



invisibleCRM

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Outlook Integration for Amdocs CRM 7 User guide



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Outlook Integration for Amdocs CRM 7: User Guide	Date: 6/24/2008

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Chapter 1

Overview

In This Chapter

Overview



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Overview

Outlook Integration for Amdocs CRM (Oi4A) is the Integration solution that brings together two key applications: Amdocs CRM and Microsoft Outlook. This software allows users to work with a unified contacts list, action items and all essential productivity tools. It helps salespeople work better and ensures corporate systems are kept current, adding value to their investment in Amdocs CRM.



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Chapter 2

Getting started

In This Chapter

Before you start

Working in offline mode

Configuration

Amdocs CRM Integration Log

Before you start

Before you get started ensure you install Oi4A components on your computer.

To start using Oi4A:

1. Launch **Microsoft Outlook**.
2. Click on **Logged Out** button on Amdocs CRM Integration toolbar (Fig. 1).

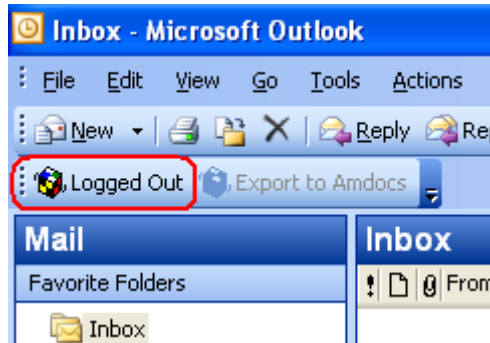


Fig. 1

3. On Amdocs CRM Integration Log window click on **Login...** button (Fig. 2).

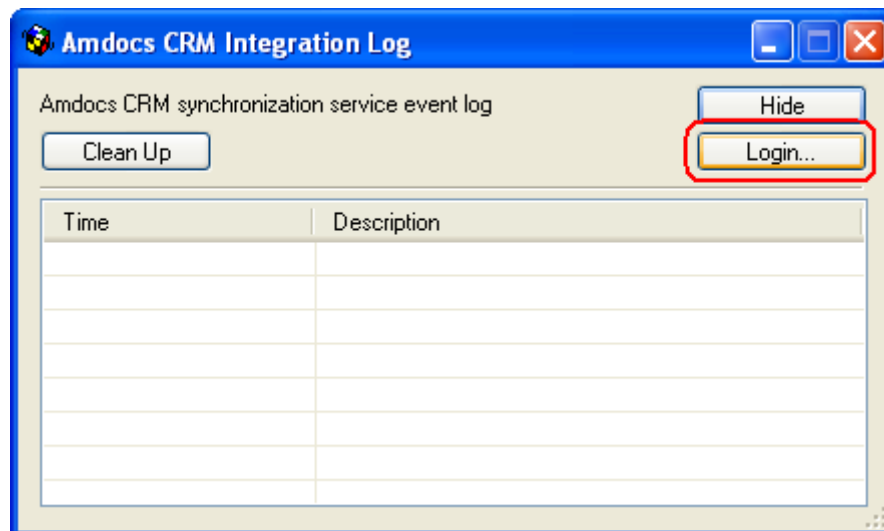


Fig. 2

4. In the login window for your Amdocs CRM account input your password for your Amdocs CRM account (Fig. 3).

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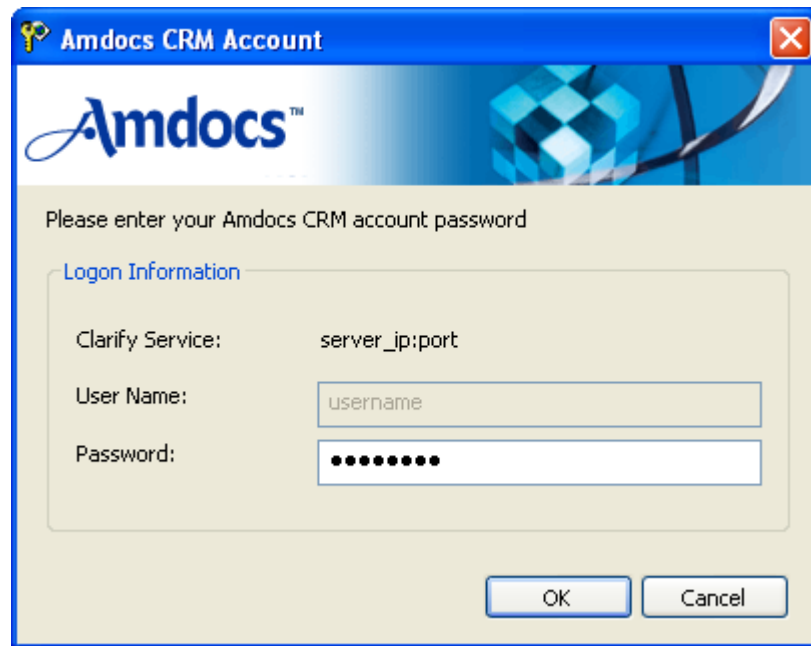


Fig. 3

5. Click the 'OK' button.

Accessing Amdocs CRM

To access Amdocs CRM use AmdocsCRM SmartClient by downloading it from the link of the following type:

http://<server_name>:<port>/smart/CRM/Crm.jnlp

Working in offline mode

You can work with MS Outlook and Amdocs CRM applications separately in offline mode.

When working in offline mode application stores manually selected for export or updated objects in the local cache and synchronizes them as soon as online mode is restored.

The 'Logged Out' button on command bar means that you are working in offline mode. You can work with all Outlook objects and use synchronization functionality for them. To connect to Amdocs CRM server click on the 'Logged Out' button and click the 'Login' button on the 'Amdocs CRM Integration Log' window (Fig. 4).

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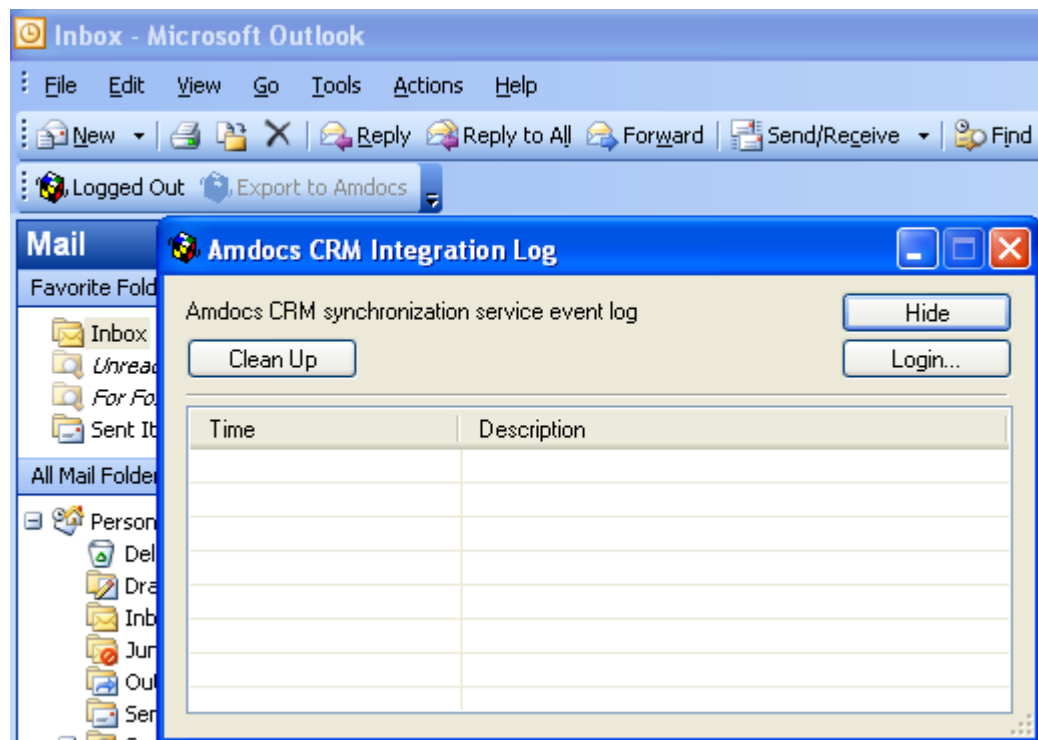


Fig. 4

After authentication process is finished all objects you created or changed in offline mode and which should be synchronized will be updated in Amdocs CRM.

Also application can go to offline mode when network connection is broken or Amdocs CRM server is not accessible. In this case integration add-in will periodically try to restore connection with the server (Fig. 5).

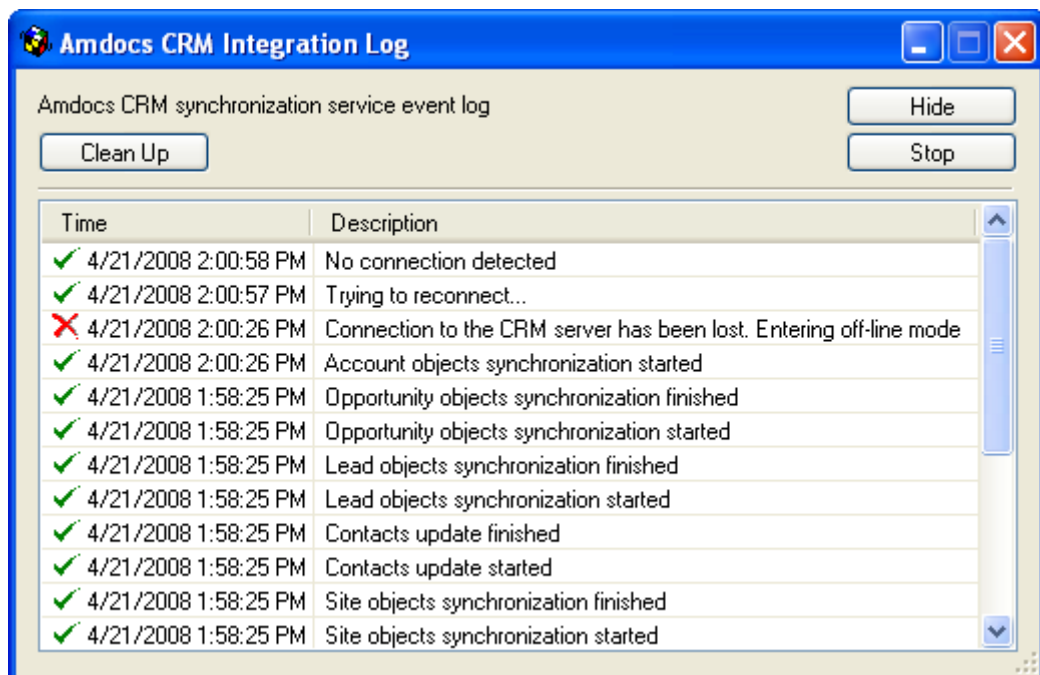


Fig. 5

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A user can cancel automatic connect procedure by clicking on the '**Stop**' button and later proceed with automatic connection procedure by clicking on the '**Login...**' button (Fig. 6).

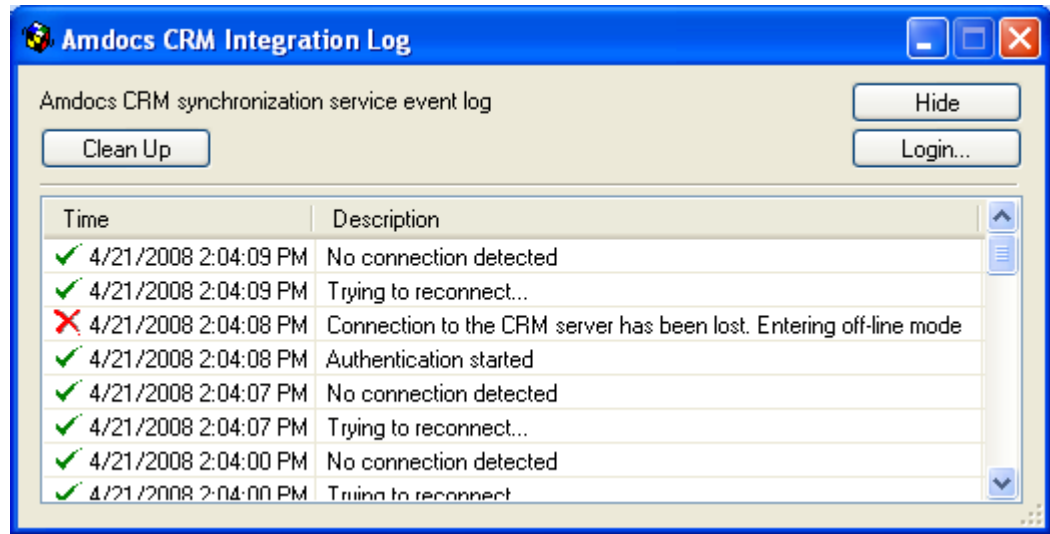


Fig. 6

Once a connection to CRM is restored, a user is notified and a usual synchronization process goes on with synchronizing contacts and messages, exported in offline mode (Fig.7).

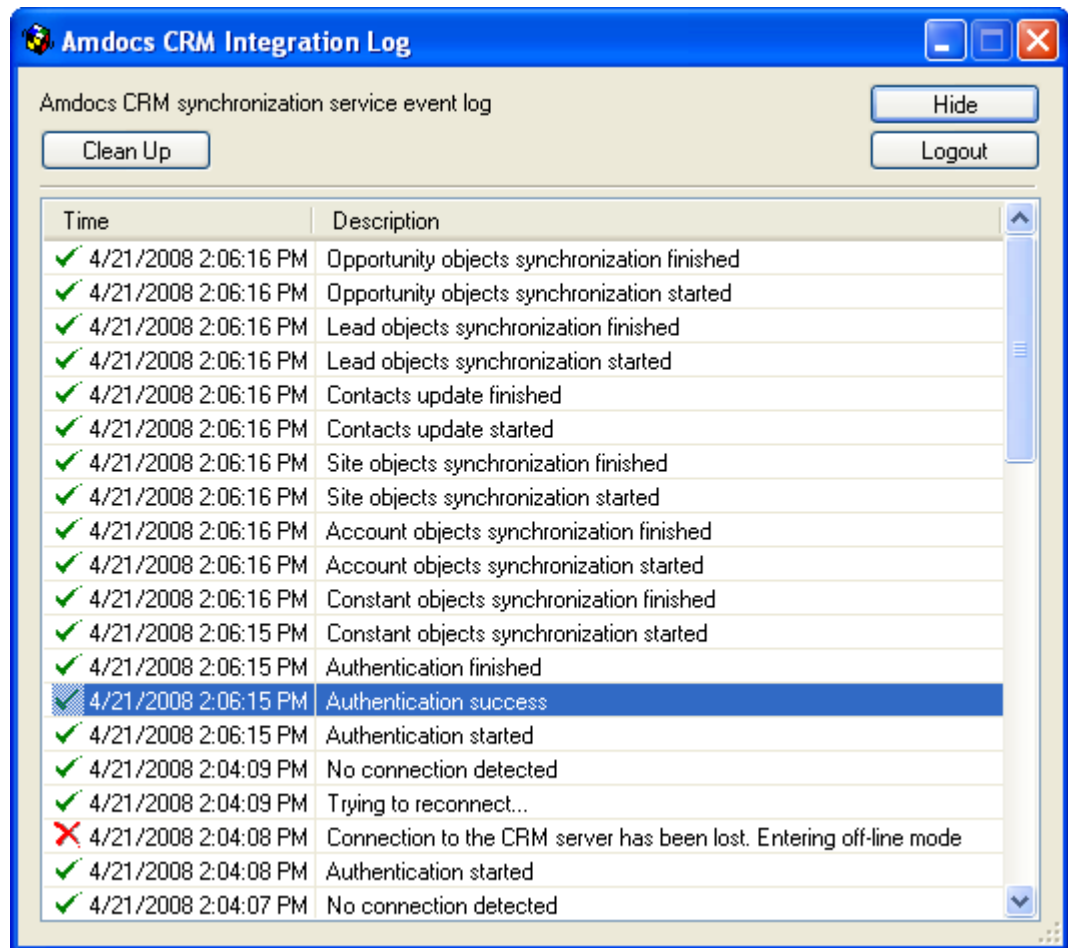


Fig. 7

Note, you can work with all types of objects in both Amdocs CRM and Outlook in offline mode and changes will be synchronized. But there is a limitation of offline mode - you can manually export contacts from Amdocs CRM to Outlook only when your Outlook is connected to the Amdocs CRM server.

Configuration

To open configuration dialog click **'Tools' -> 'Options' -> 'Amdocs CRM Options'** in MS Outlook. This form contains connect information for the Amdocs CRM Server and Synchronization settings (Fig. 8).

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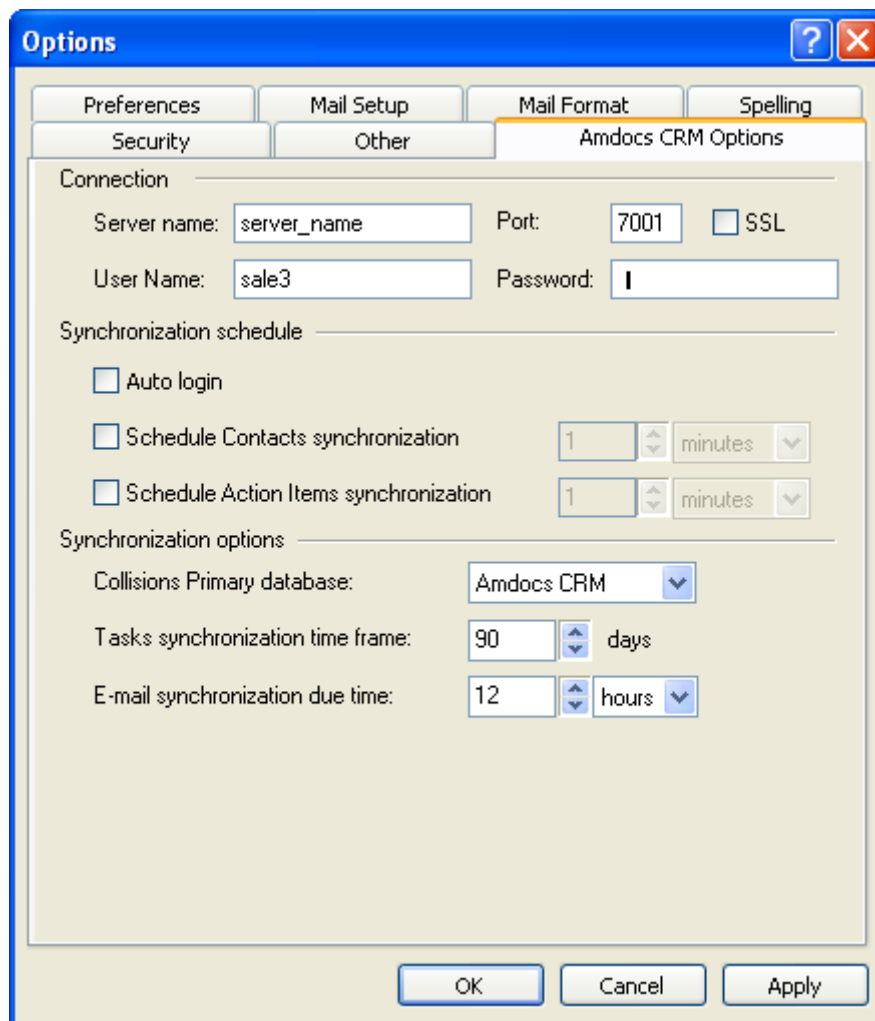


Fig. 8

Information about the Amdocs CRM **server**, **port**, **SSL connection** and **user name** is shown in the '**Connection**' section.

By default Amdocs CRM database is selected as the **Primary database**. This means that if you update the same object in Outlook and Amdocs CRM in one synchronization period, changes from Amdocs CRM have higher priority over changes made in Outlook (read more on this option in Chapter 9 'Resolving collisions').

In the '**Synchronization schedule**' section you can select the '**Auto login**' option in order to automatically connect to the Amdocs CRM server when you launch MS Outlook. You can specify time period for Contacts and Action Items automatic synchronization. Minimum time period is 1 minute.

Automatically synchronized objects are:

Outlook -> Amdocs CRM direction

- Tasks, calendar items
- Contacts, manually exported from / imported to Amdocs CRM and modified later in Outlook

Amdocs CRM -> Outlook direction

- Action items



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- Contacts, manually exported from / imported to Outlook and modified later in Amdocs CRM

By default automatic synchronization is disabled for users to be able to set appropriate synchronization options first.

In the '**Synchronization options**' section:

'**Tasks synchronization time frame**' defines the time period for tracking a task, calendar item and action items this means that if an object is updated during certain time frame, changes will be synchronized.

The default value for this option is 90 days.

Note, time frame option matters a lot on the very first synchronization run. It allows defining period of time in the past for which Outlook tasks, calendar items and Amdocs CRM action items, **created before** Oi4A Outlook add-in installation, will be synchronized.

On second and all subsequent synchronization runs only **modified** since Oi4A Outlook add-in installation objects, satisfying this time frame will be synchronized.

'**E-mail synchronization due time**' specifies due time for Amdocs CRM action items synchronized from Outlook e-mails. More on Synchronizing Emails in the 'Working with Emails' section.

To save changes click the 'Apply' button.

Note connection settings changes take effect after Outlook restarting.

Amdocs CRM Integration Log

To open the Amdocs CRM Integration Log click the 'Logged on' button on command bar in MS Outlook. The new window presents common information about synchronization process. When you start Outlook and connect to the Amdocs CRM server there is information about authentication results in this window. During synchronization of different objects use this window to look after synchronization status and the number of synchronized objects (Fig. 9).

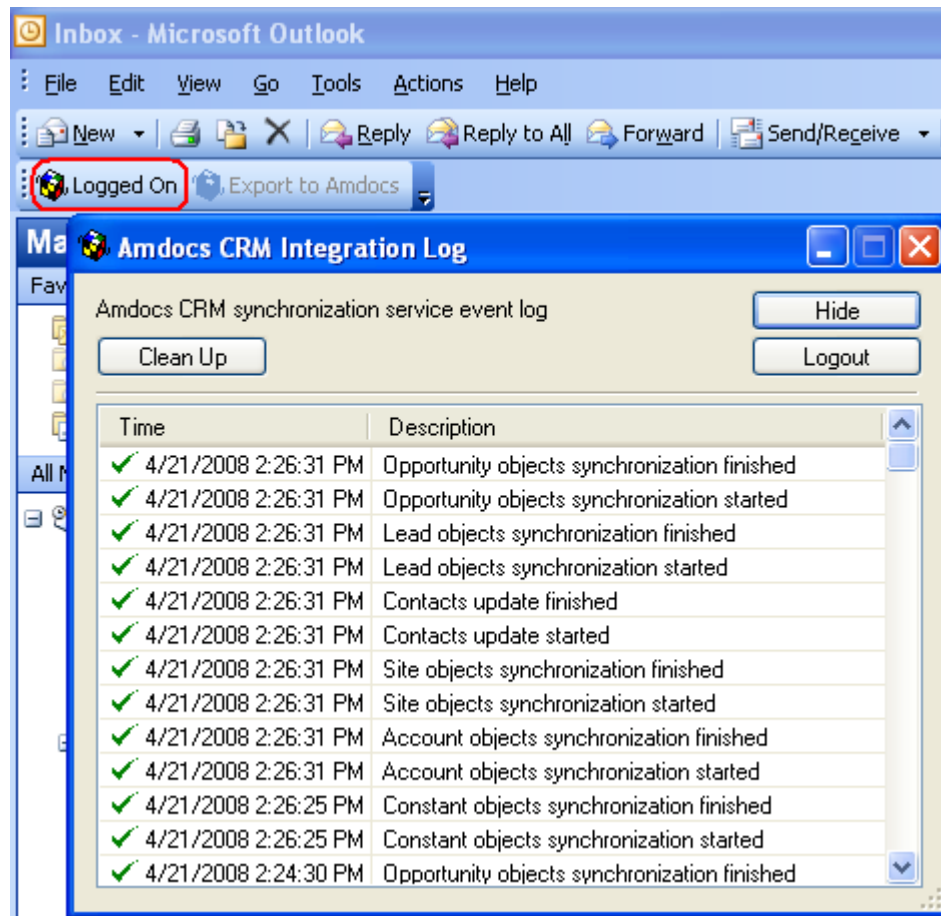


Fig. 9



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Chapter 3

Working with Contacts

In This Chapter

Amdocs CRM -> Outlook

Outlook -> Amdocs CRM



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Amdocs CRM -> Outlook

Open Contacts page in AmdocsCRM SmartClient. The 'Add to Outlook' button for export Contacts to Outlook presents on the command bar.

Note, before pressing the 'Add to Outlook' button ensure that MS Outlook and InvisibleCRM Oi4A software are installed on your computer, Outlook client is launched and login to Amdocs CRM was successful.

When you create a new contact in Amdocs CRM, it does not synchronize with MS Outlook automatically. Use the 'Add to Outlook' button for pushing contact to Outlook explicitly.

Note you can change Address Information only using the 'Look Up' button in Amdocs CRM, if you change Address Information directly on Contact form in Amdocs CRM, these changes will not be synchronized.

So, the way to update Contact address information in Outlook is to update the Site information in Amdocs CRM either through 'Look Up' button or through 'Search'->'Site' menu item.

Note the latter operation affects all synchronized contacts, related to updated site, in Outlook. Upon Site synchronization, which by default happens every 2 minutes, address information will be automatically updated in all Outlook contacts, related to updated site.

When you update the 'Preferred time'/'Preferred mode' field for Contact in Amdocs CRM you should use the 'Add to Outlook' button to synchronize changes.

To export contact to Outlook select it and click the 'Add to Outlook' button. After synchronization the message appears "N object exported to Outlook successfully", where N is a number of contacts selected for import. And now you can find this contact in Outlook contacts.

For synchronized contacts all changes made in Amdocs CRM are synchronized automatically with MS Outlook.

If you want to synchronize more than one contact, select them on the Contact page in Amdocs Sales SmartClient and then click the 'Add to Outlook' button. When synchronization is finished you can continue work with them in Outlook (Fig. 10).

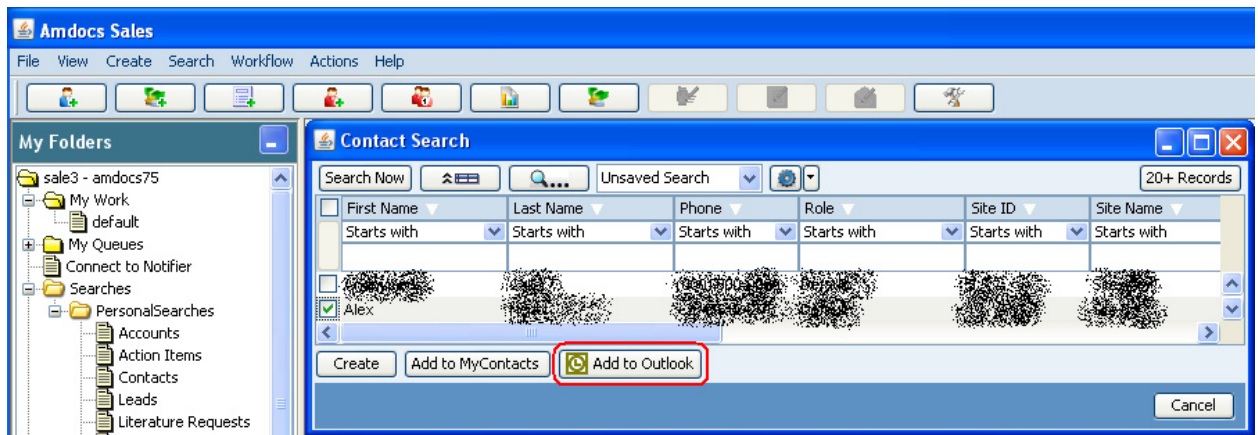


Fig. 10

Note if contact is not synchronized with Outlook, see troubleshooting section.

Outlook -> Amdocs CRM

Open the Contacts folder in MS Outlook. The Export to Amdocs button for export contacts to Amdocs CRM presents on the command bar (Fig. 11).

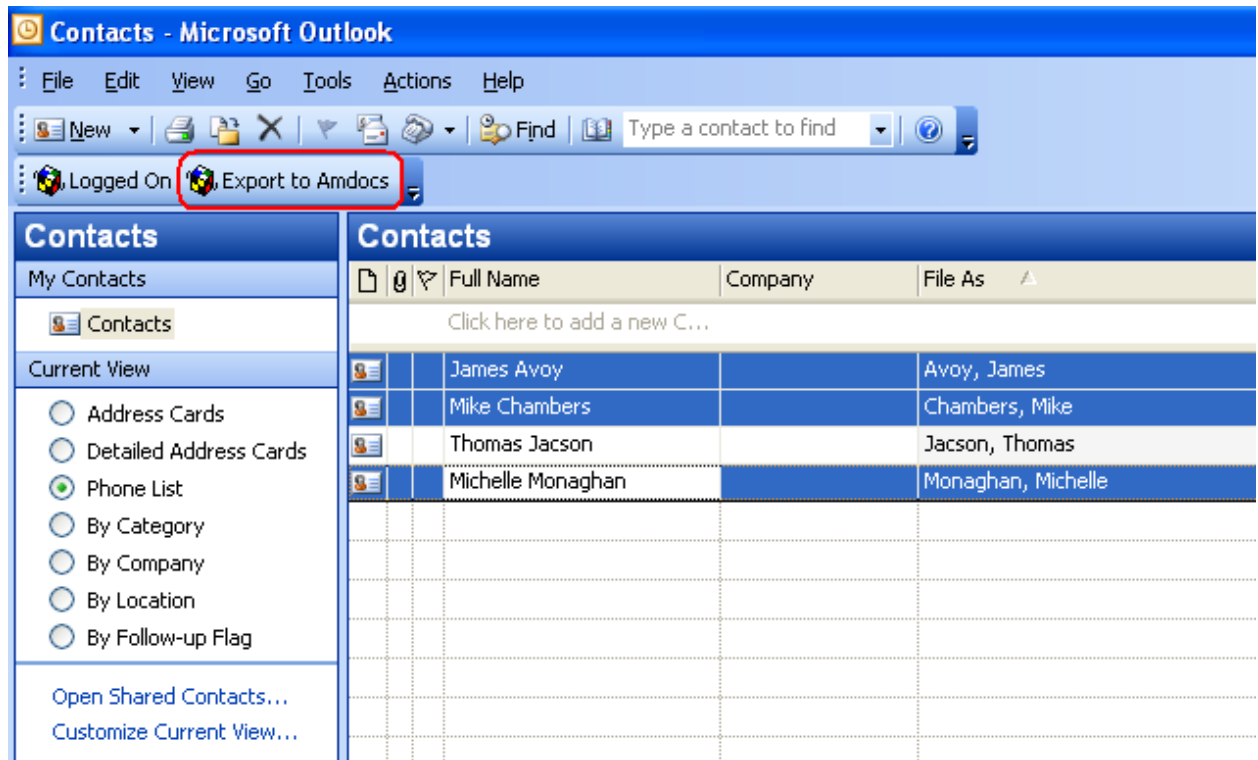


Fig. 11

To synchronize a contact (a new contact or modified existing one) you can choose between automatic and manual synchronization. For automatic

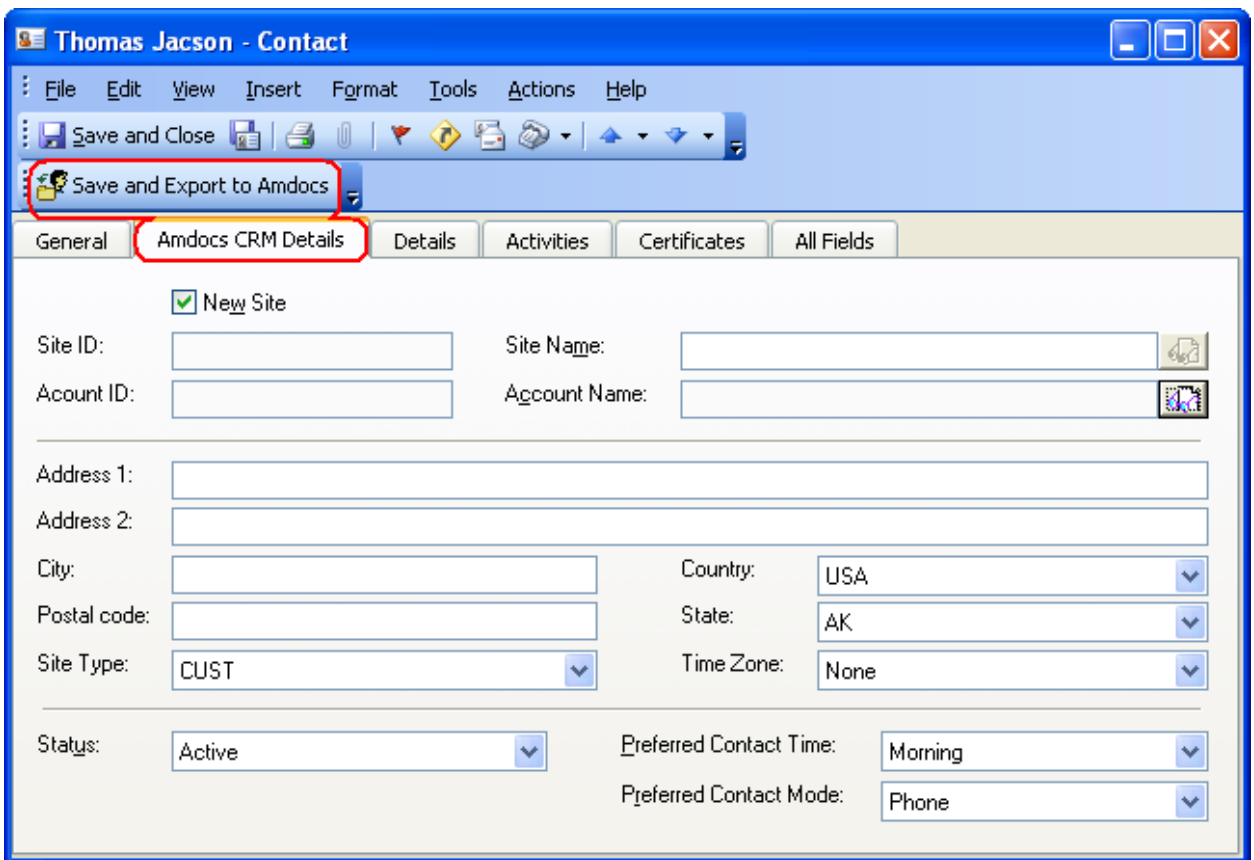
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synchronization use the 'Save and Export to Amdocs' button on contact form to save changes; for manual sync, use the 'Export to Amdocs' button on the command bar.

Open a new contact form to create a new contact. There are the 'Amdocs CRM Details' tab and the 'Save and Export' button on the command bar. Specify information about Contact on the 'General' tab.

Note, that 'First name', 'Last name' and 'Phone number' fields are required fields, if you want this object to be synchronized with Amdocs CRM.

Switch to the 'Amdocs CRM Details' tab. This tab presents additional information about contact which is kept in Amdocs CRM (Fig. 12).



The screenshot shows a contact form for 'Thomas Jacson' with the 'Amdocs CRM Details' tab selected. The 'Save and Export to Amdocs' button in the command bar is highlighted with a red box. The form contains the following fields and options:

- New Site
- Site ID: [Text Field]
- Site Name: [Text Field]
- Account ID: [Text Field]
- Account Name: [Text Field]
- Address 1: [Text Field]
- Address 2: [Text Field]
- City: [Text Field]
- Country: USA (Dropdown)
- Postal code: [Text Field]
- State: AK (Dropdown)
- Site Type: CUST (Dropdown)
- Time Zone: None (Dropdown)
- Status: Active (Dropdown)
- Preferred Contact Time: Morning (Dropdown)
- Preferred Contact Mode: Phone (Dropdown)

Fig. 12

You can select an existing Site name, in this case the 'Account name' field will be automatically filled in with Account name related with this site. You can also create a new site for a contact. To do this enable the 'New Site' option and type a new site in the 'Site name' field (Fig. 13).

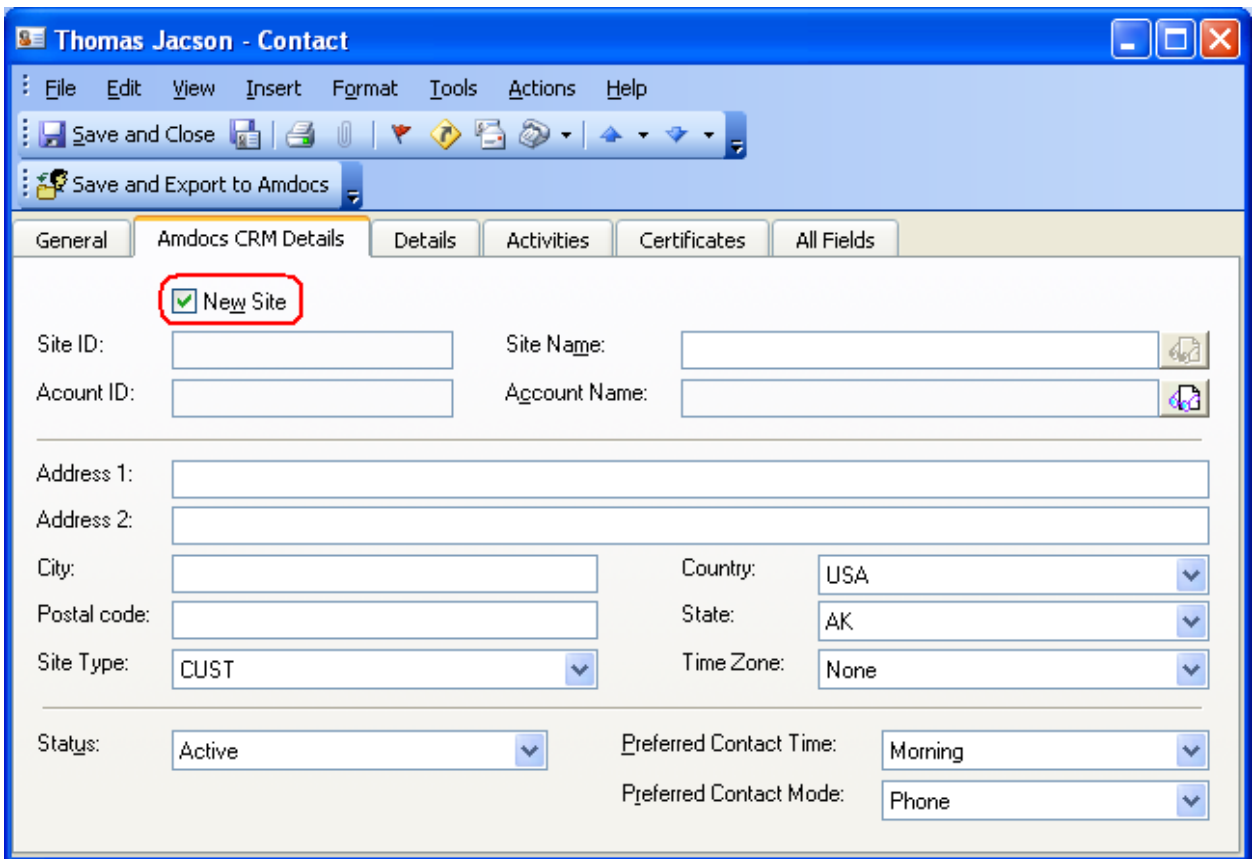


Fig. 13

You can select an Account which will be related with this site and contact and specify other information connected with this contact.

Note, when you create a new contact in MS Outlook Time Zone on Amdocs CRM Details tab should correspond to Country, otherwise this field will not be represented correctly on Contact form in Amdocs CRM.

If you want this contact to be synchronized automatically after saving use the 'Save and Export to Amdocs' button. Otherwise use the 'Save and Close' button and synchronize this object manually later.

You can synchronize one or more existing contacts in Outlook with Amdocs CRM manually, to do this select this object in Outlook and click the 'Export to Amdocs' button. When synchronization is finished you can continue work with it in Amdocs CRM.

When you update a contact in Outlook use the 'Save and Export to Amdocs' button to apply and synchronize changes, otherwise use the 'Save' and 'Close' buttons and synchronize this object manually later. When you update a contact in Amdocs CRM all changes are synchronized with MS Outlook automatically.

When you delete a contact in Outlook, it will not appear again after synchronization. If you want to synchronize this object once again, use the 'Add to Outlook' button in Amdocs CRM.

When you are working in Offline mode, you also can use the 'Export to Amdocs' button for contacts export or the 'Save and Export to Amdocs' button to synchronize a new contact. These objects will appear in Amdocs CRM as soon as you connect to Amdocs CRM.



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Chapter 4

Working with Activities

In This Chapter

Outlook Tasks

Outlook Calendar

Amdocs CRM Action Items

Outlook Tasks

Go to the Tasks folder in MS Outlook.

Note, when you create a new task in Amdocs CRM or in MS Outlook it synchronizes automatically if synchronization option is enabled on the 'Amdocs CRM Options' tab in MS Outlook.

Open a new task form to create a new task. The 'Amdocs CRM Details' tab is present on this form (Fig. 14).

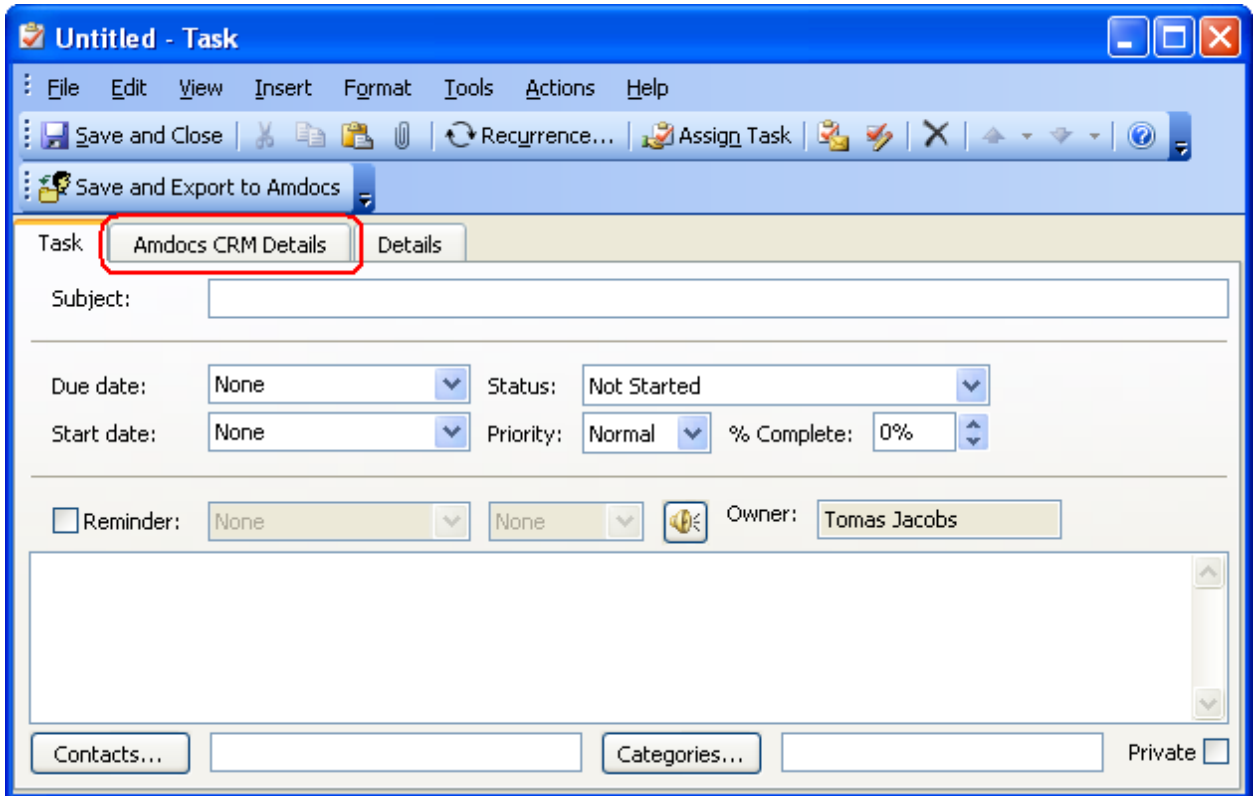


Fig. 14

Specify information about the task on the Task tab.

Note that Outlook task has no exact day time, only a year-month-date attribute. Thus Outlook tasks are exported to Amdocs CRM with 00:00 AM day time. Vice versa Amdocs CRM Action Item exact day time is dropped when the object is exported to Outlook. Only the date matters in this case.

The next table explains possible specific cases of assigning dates in Outlook tasks and how these dates are interpreted when tasks are synchronized with Amdocs CRM.

Start Date/Due Date	Outlook	Amdocs
---------------------	---------	--------

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Start date	None	Current date
Due date	None	Current date + 7 days
Start date	None	Current date
Due date	Selected date > Current date	Selected date
Start date	None	Current date
Due date	Selected date < Current date	Current date

Note, that 'Title' is a required field, if you want this object to be synchronized with Amdocs CRM.

Switch to the 'Amdocs CRM Details' tab. This tab contains additional information about related items for task which is kept in Amdocs CRM.

Outlook task correspond "To do" and Amdocs CRM action items. You can select related Contact, Account, Opportunity or Lead for the task. To do this click on the 'Add' button and select an item you need in the 'Select Related Amdocs Item' form (Fig .15). For convenience you can use Search option.

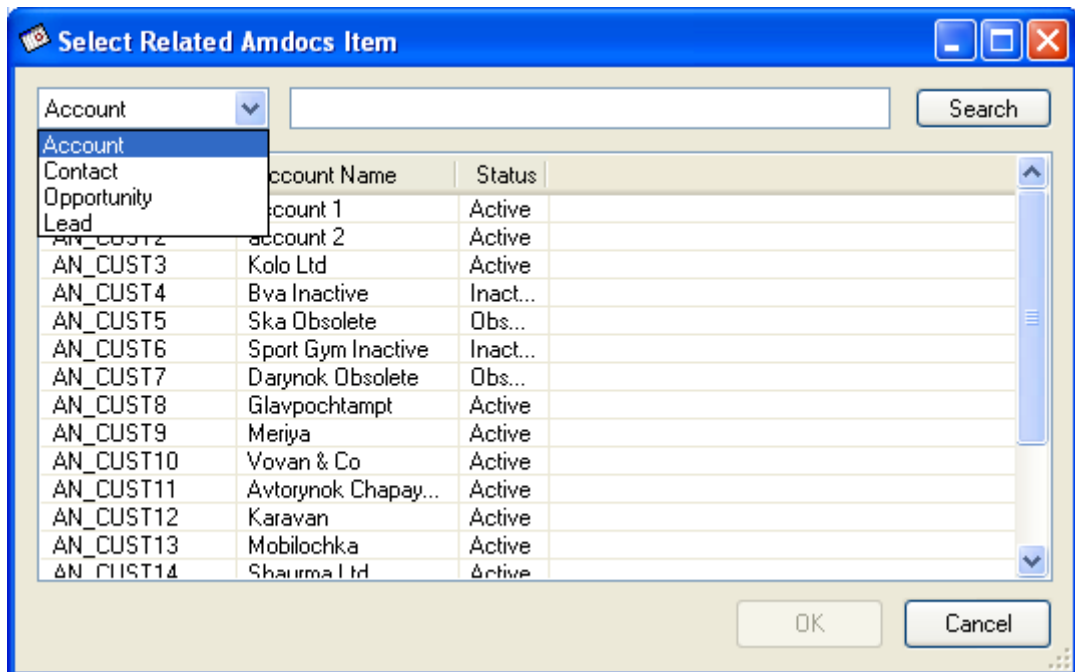


Fig. 15

Note, that you can select only one object of each type and these objects

should be related between themselves.

To remove a selected item use the 'Remove' button (Fig. 16).

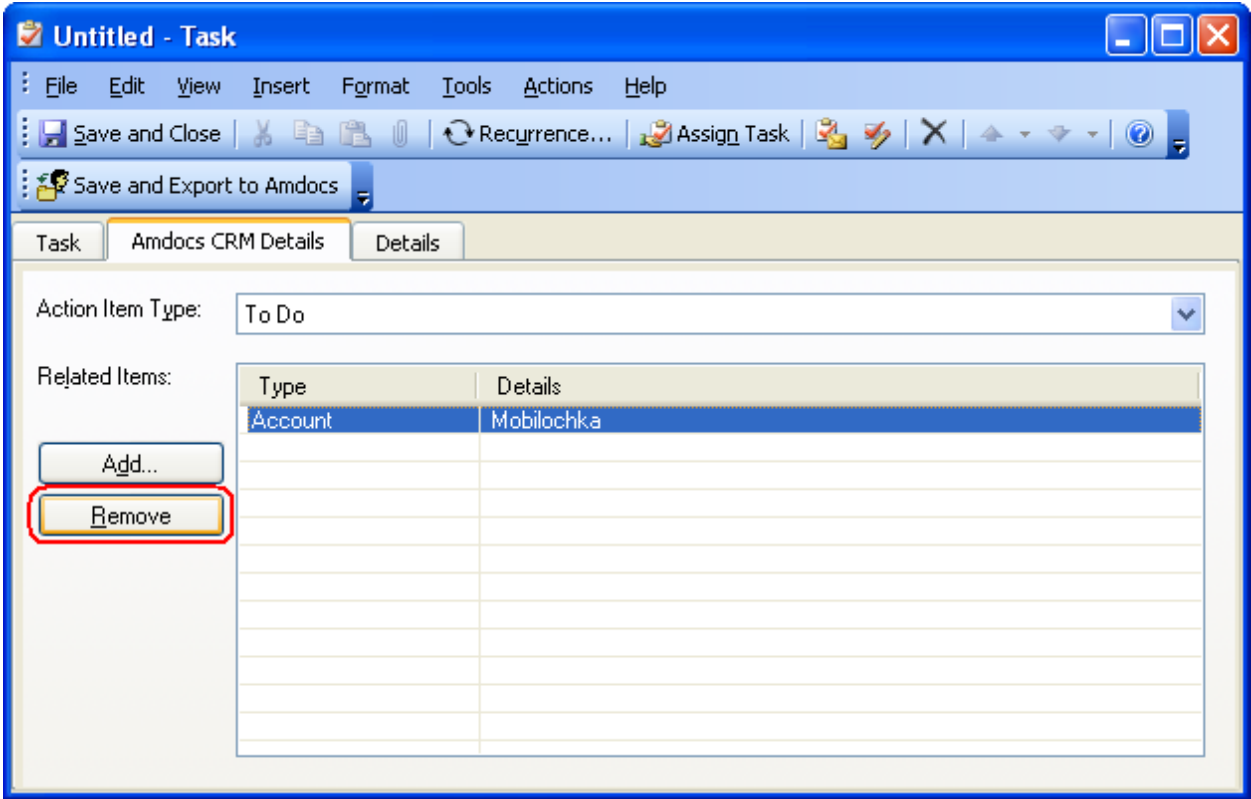


Fig. 16

Click the 'Save and close' button to save Task.

When you delete a task in Outlook, it will not appear again after synchronization. If you want to synchronize this object once again update this object in Amdocs CRM.

When you are working in Offline mode, you also can create new tasks in Outlook and Amdocs CRM. These objects will appear in Amdocs CRM or in Outlook as soon as you connect to Amdocs CRM accordingly.

Outlook Calendar

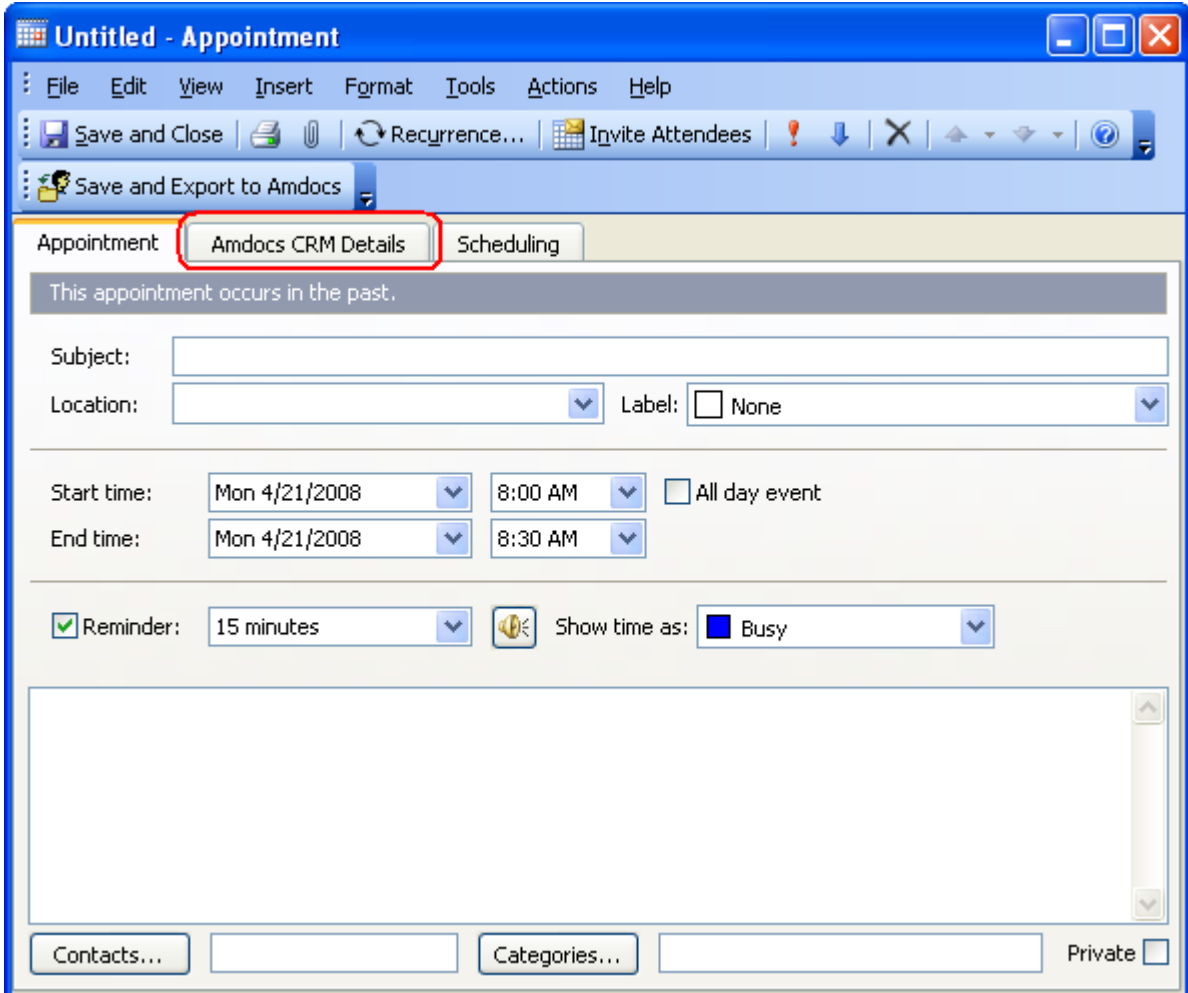
Open Calendar in MS Outlook.

Note, when you create a new appointment in Amdocs CRM or in MS Outlook it synchronizes automatically if synchronization option is enabled on Amdocs CRM Options tab in MS Outlook.

Open a new appointment form to create a new appointment. The 'Amdocs CRM Details' tab presents on this form. Specify information about an object on the 'Appointment' tab and then switch to the 'Amdocs CRM Details' tab. This tab contains additional information about related items for appointment which is kept in Amdocs CRM (Fig. 17).

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Note, Outlook appointments do not have statuses and priorities values, thus Amdocs CRM assigns default values for these fields for corresponding Action Items after export operation.



The screenshot shows the 'Appointment' dialog box in Outlook. The 'Amdocs CRM Details' tab is selected and highlighted with a red rectangular box. The dialog box contains the following fields and options:

- Appointment** (selected), **Amdocs CRM Details** (highlighted), **Scheduling**
- Message: "This appointment occurs in the past."
- Subject:** [Empty text box]
- Location:** [Dropdown menu]
- Label:** None [Dropdown menu]
- Start time:** Mon 4/21/2008 [Dropdown], 8:00 AM [Dropdown], All day event
- End time:** Mon 4/21/2008 [Dropdown], 8:30 AM [Dropdown]
- Reminder:** 15 minutes [Dropdown]
- Show time as: Busy [Dropdown]
- Contacts...** [Text box]
- Categories...** [Text box]
- Private**

Fig. 17

For Outlook appointment you can select Amdocs CRM action item types "Meeting", "Phone Call", "Correspondence", "Email" or "Fax" as Action Items type in Amdocs CRM. ". You can select related Contact, Account, Opportunity or Lead for appointment. To do this, click on the 'Add' button and select an item you need in the 'Select Related Amdocs Item' form (Fig. 16).

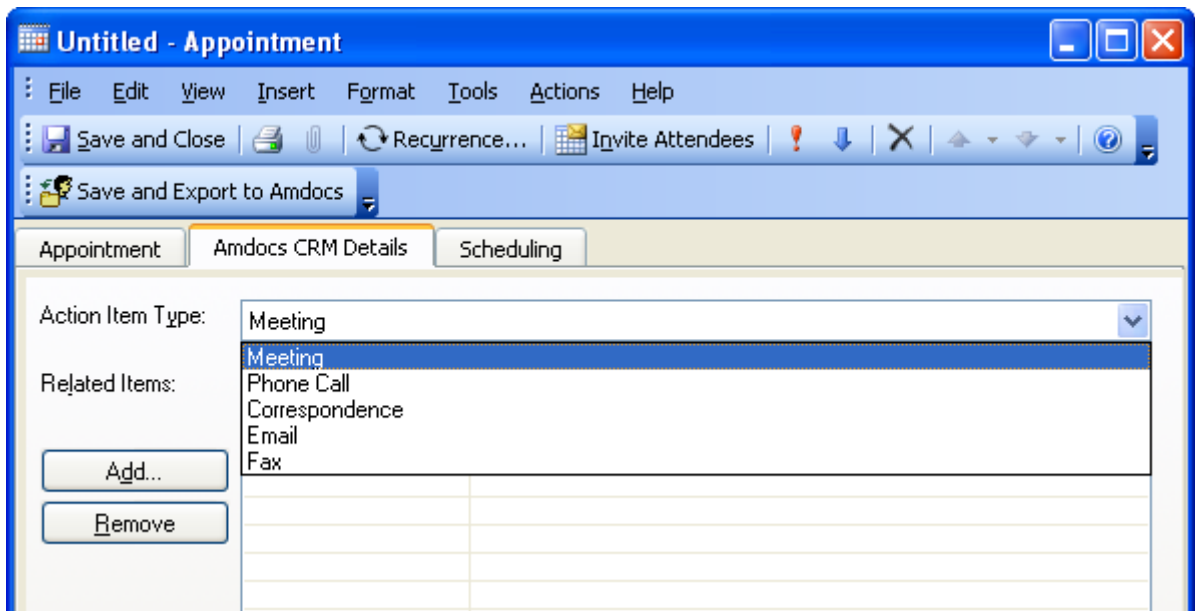


Fig. 18

Note, that you can select only one object of each type and these objects should be related between themselves.

To remove selected item use the 'Remove' button

Click the 'Save and close' to save an appointment.

When you delete an appointment in Outlook, it will not appear again after synchronization. If you want to synchronize this object once again update this object in Amdocs CRM.

When you are working in Offline mode you also can create new appointments in Outlook and Amdocs CRM. These objects will appear in Amdocs CRM or in Outlook as soon as you connect to Amdocs CRM accordingly.

Note, that Posted/Accepted Meeting Requests are also synchronized with Amdocs CRM (see also known issue 10).

Amdocs CRM Action Items

Open Action Items page in Amdocs Sales SmartClient. When you create a new action item, it is automatically synchronized with Outlook activities (appointments and tasks). Action items with types "Meeting", "Phone Call", "Correspondence", "Email" or "Fax" correspond to appointments in Outlook. Action items with type "To do" correspond to Tasks in Outlook.



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Chapter 5

Outlook e-mails

In This Chapter

Outlook e-mails

Outlook e-mails

Open the Mail folder in MS Outlook.

Open a new email form. There are 'Send and Export to Amdocs' button and the button with service objects from Amdocs CRM.

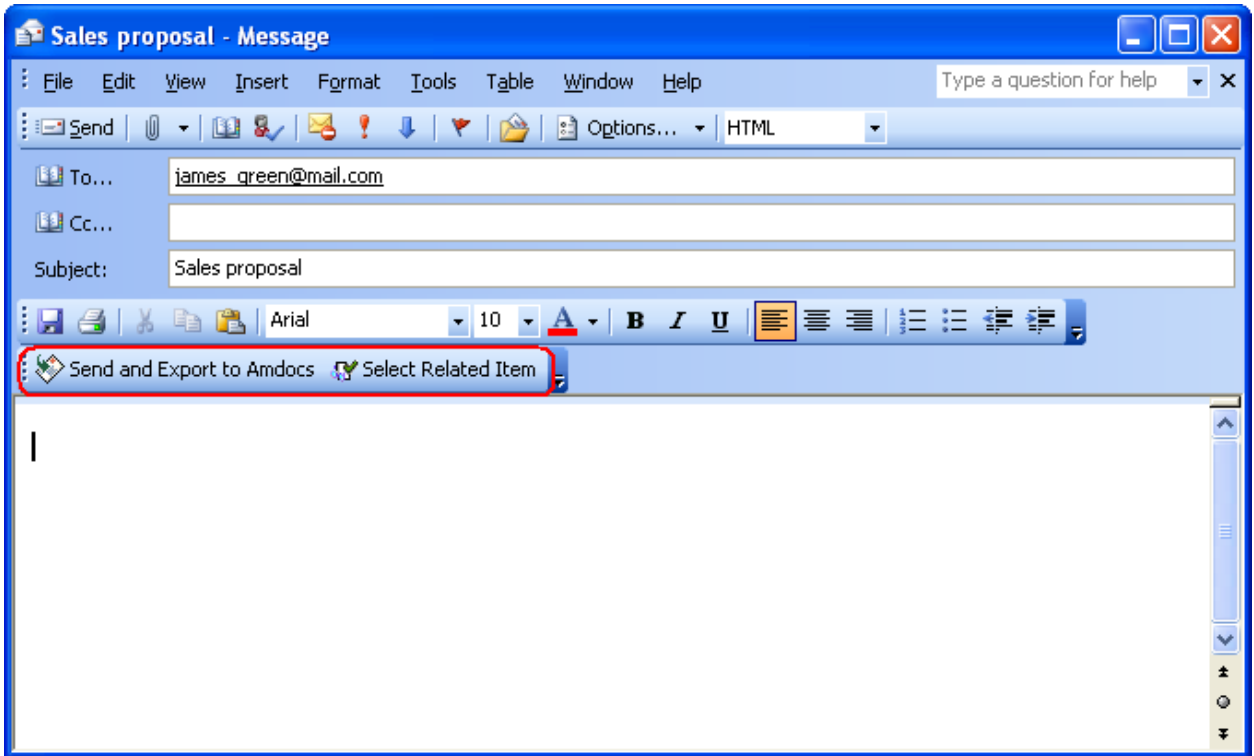


Fig. 19

Compose a new email. Press "Select Related Item" button, you can select one related object for exported email: Account or Opportunity (Fig. 19). To send and push this email to Amdocs CRM use the 'Send and Export to Amdocs' button. Outbound emails exported from Outlook are stored as "E-mail" Action Items in Amdocs CRM and have "Outbound Email: subject" title, where subject is the subject of the e-mail (Fig. 20).

While exporting email to CRM, Contact/Lead mentioned in From (for inbound messages), or the first one in To/CC (for outbound messages) fields will be **automatically** attached to the created Action Item.

You can export emails from the 'Sent Items' folder to Amdocs CRM. To do this open the sent email and click the 'Export to Amdocs' button. Outbound emails exported from Outlook are stored as "E-mail" Action Items in Amdocs CRM and have "Outbound Email: subject" title, where subject is the subject of the e-mail.

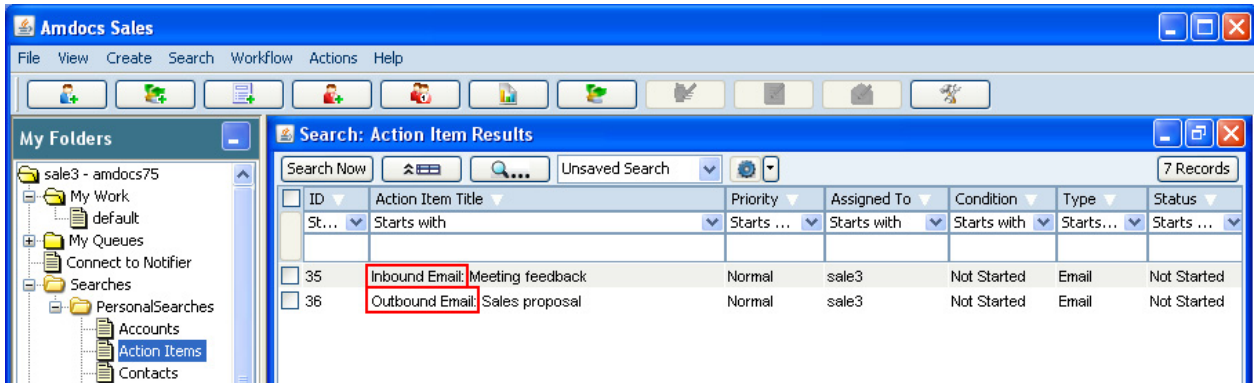


Fig. 20

You can export inbound emails to Amdocs CRM from the 'Inbox' folder. To do this open the email, select a related item and click the 'Export to Amdocs' button. Inbound emails are stored as "E-mail" Action Items in Amdocs CRM and have "Inbound Email: subject" title, where subject is the subject of the e-mail.

Due time for such Action Items is set in "E-mail synchronization due time" value on Amdocs CRM Options tab in Outlook options (Fig. 21).

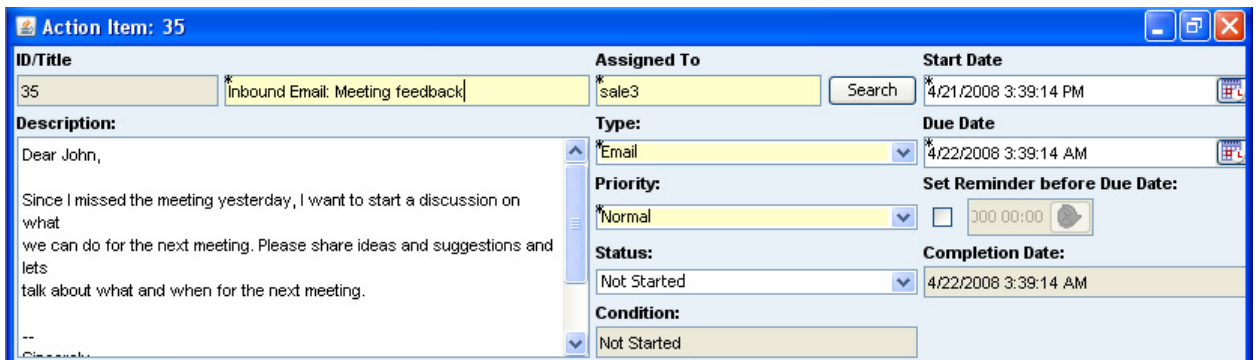


Fig. 21

Note, while exporting email to CRM, Contact/Lead mentioned in 'From' (for inbound messages), or the first one in 'To/CC' (for outbound messages) fields will be **automatically** attached to the created Action Item. See also Troubleshooting section part 5.

Note these Action items are not synchronized backwards with Outlook.



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Chapter 6

Service Objects

In This Chapter

Service Objects

Service Objects

When you create a contact, task, appointment or e-mail in Outlook you can specify related items for these objects, which are stored in Amdocs CRM.

Information about service objects is stored on a client side in a special settings file. So, even if you work in offline mode you can select these objects as related items for activities and contacts in Outlook. When you create a new account, contact, lead, opportunity or site in Amdocs CRM, it is automatically synchronized with Outlook.

For tasks and opportunities you can select related items like "Account", "Contact", "Lead" and "Opportunity"; for e-mails you can select related items like "Account" and "Opportunity"; for Contact - "Account" and "Site name" These objects are stored in Amdocs CRM and synchronize automatically with Outlook when you connect to the Amdocs CRM server (Fig. 22).

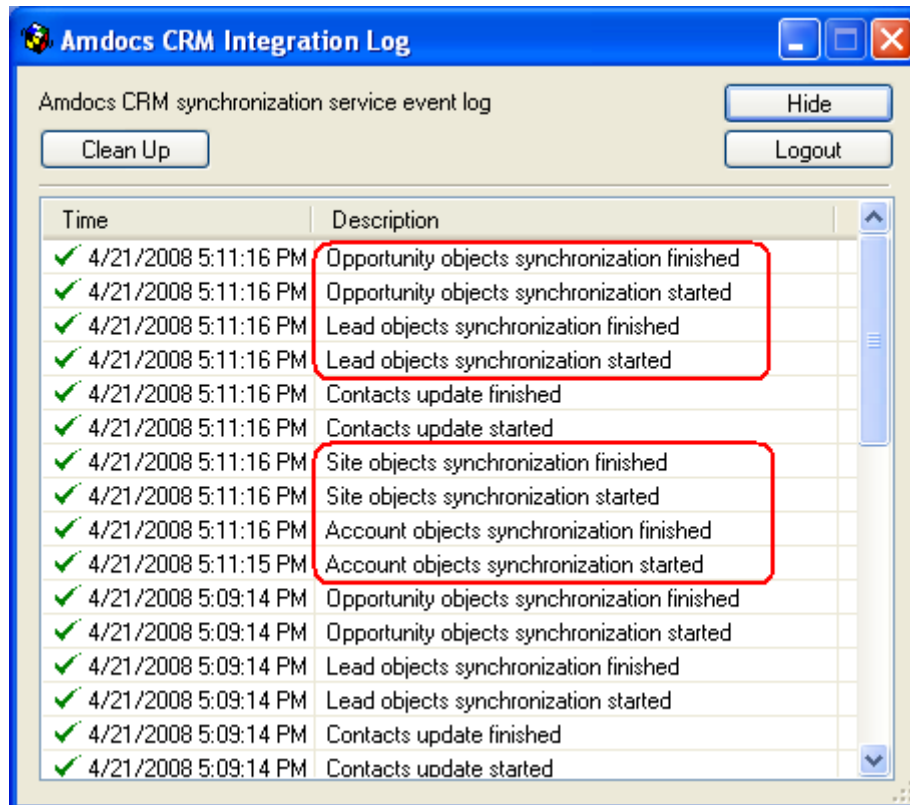


Fig. 22

You may change status of service objects (Active, Inactive, Obsolete). Obsolete objects can't be listed as related objects, but existing links to these objects are preserved. Inactive objects are still present while listing (Fig. 23)

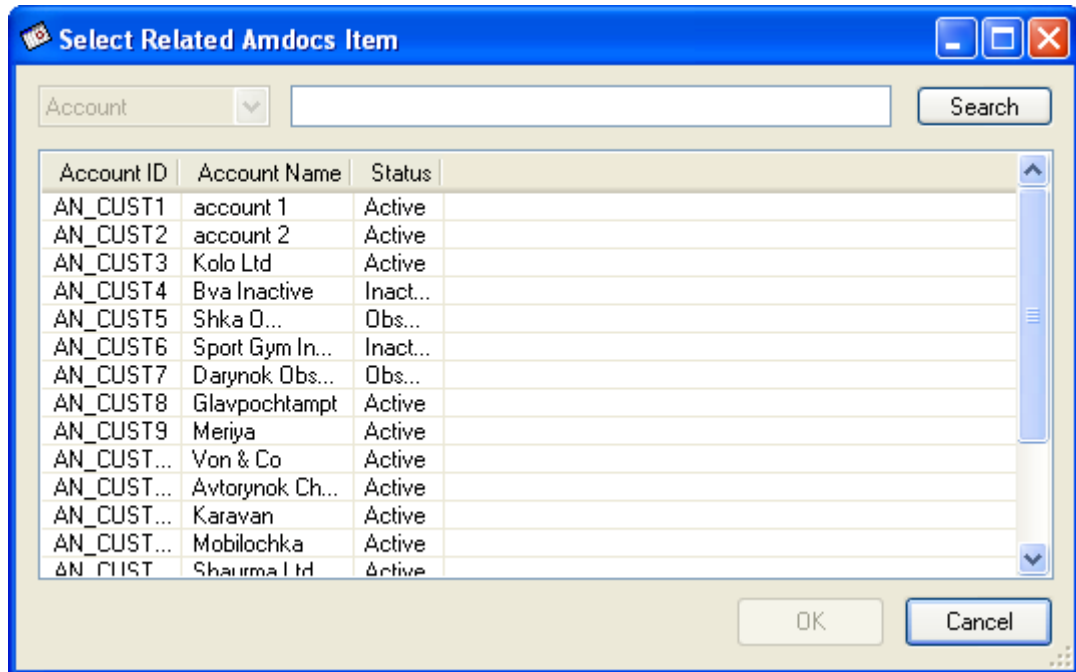


Fig. 23



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Fields mapping

In This Chapter

Fields mapping



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Fields mapping

OI4A automatically maps synchronizable fields of Outlook objects (contacts, tasks, calendar events and e-mails) with corresponding fields of Amdocs CRM objects.

Contact

Field #	Amdocs CRM Contact Field Name	Outlook Contact Field Name
1	First name	First name
2	Last name	Last name
3	Title	Title
4	Phone	Business phone
5	Email	E-mail
6	Job title	Job title
7	Alternate Fax	Business fax
8	Alternate Mobile	Mobile
9	Account name	Company
	<i>Site fields</i>	<i>Address fields</i>
10	Address	Street
11	City	City
12	State	State/Province
13	Postal code	ZIP/Postal code
14	Country	Country/Region

Task

Field #	Amdocs CRM Action Item Field Name	Outlook Task Field Name
1	Title	Subject
2	Start Date	Start date
3	Due Date	Due date
4	Priority	Priority
5	Status	Status
6	Description	Body



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Event

Field #	Amdocs CRM Action Item Field Name	Outlook Event Field Name
1	Title	Subject
2	Start Date	Start date
3	Due Date	Due date
4	Priority	Importance
5	Description	Body

E-mail

Field #	Amdocs CRM Action Item Field Name	Outlook E-mail Field Name
1	Title: <i>"Inbound/Outbound Email:" + Subject</i>	Subject
2	Priority	Importance
3	Description	Body



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Chapter 7

Troubleshooting

In This Chapter

Troubleshooting

Troubleshooting

1. Last synchronization status

After synchronization process is finished you can follow the status of synchronization for objects. To do this open a synchronized object in Outlook, and check the 'Last Sync Status' button on the command bar. When an object is successfully synchronized its 'Last Sync Status' is 'OK' and if you click this button message indicating last synchronization time will appear. If there were any problems during the synchronization process there will be the 'Last Synchronization Status is Error' button on command bar. You can click the button to view details about synchronization error (Fig. 24).

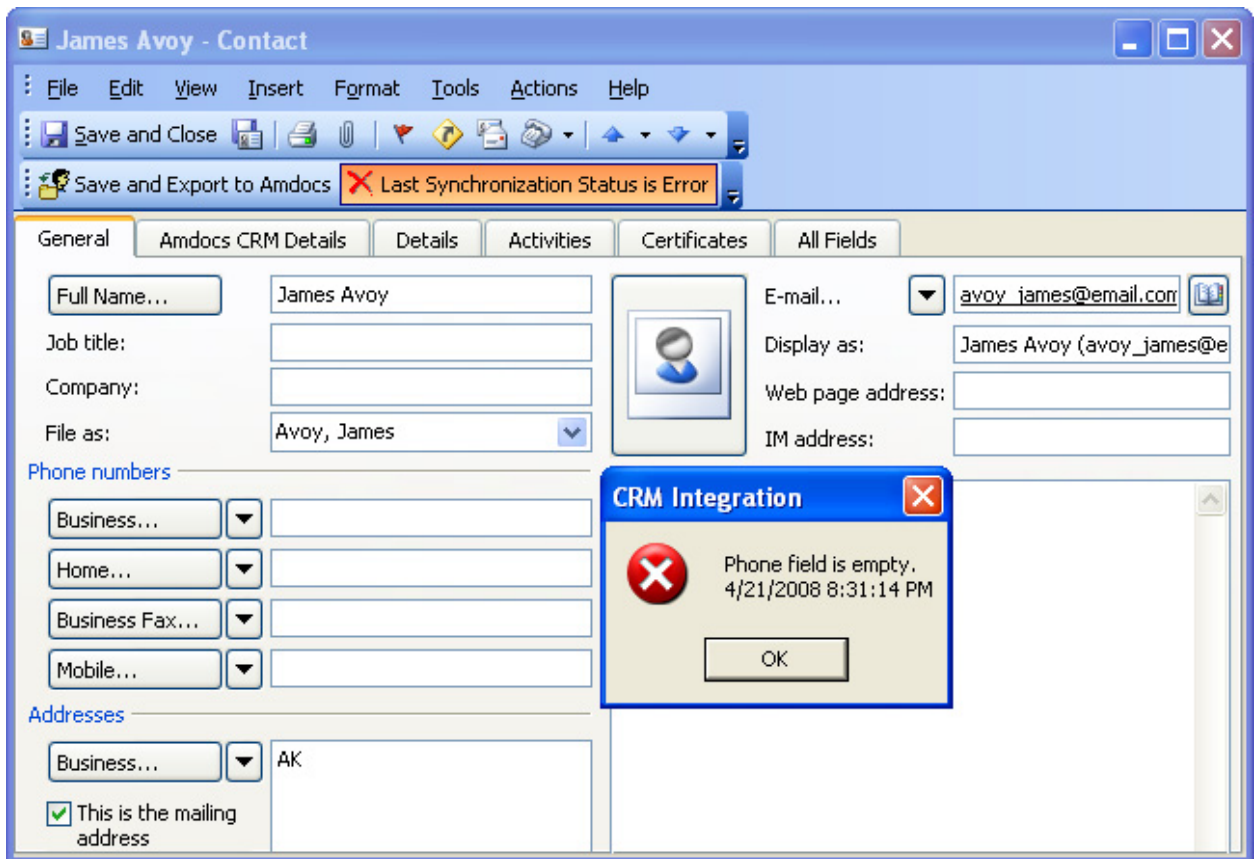


Fig. 24

2. Required fields

When you create objects in MS Outlook specify all required fields for objects, otherwise there will be errors during synchronization process and these objects will not be synchronized into Amdocs CRM.

For 'Contact' the required fields are 'First name', 'Last name' and 'Phone number'.

For 'Tasks/Appointments' the required field is 'Title'.

3. Contact/Account and Opportunity/Account relationship for Action Items

When you select related items for a task or appointment make sure that they are related in Amdocs CRM, otherwise there will be an error during synchronization process and these objects will not be synchronized to Amdocs CRM (Fig. 25).

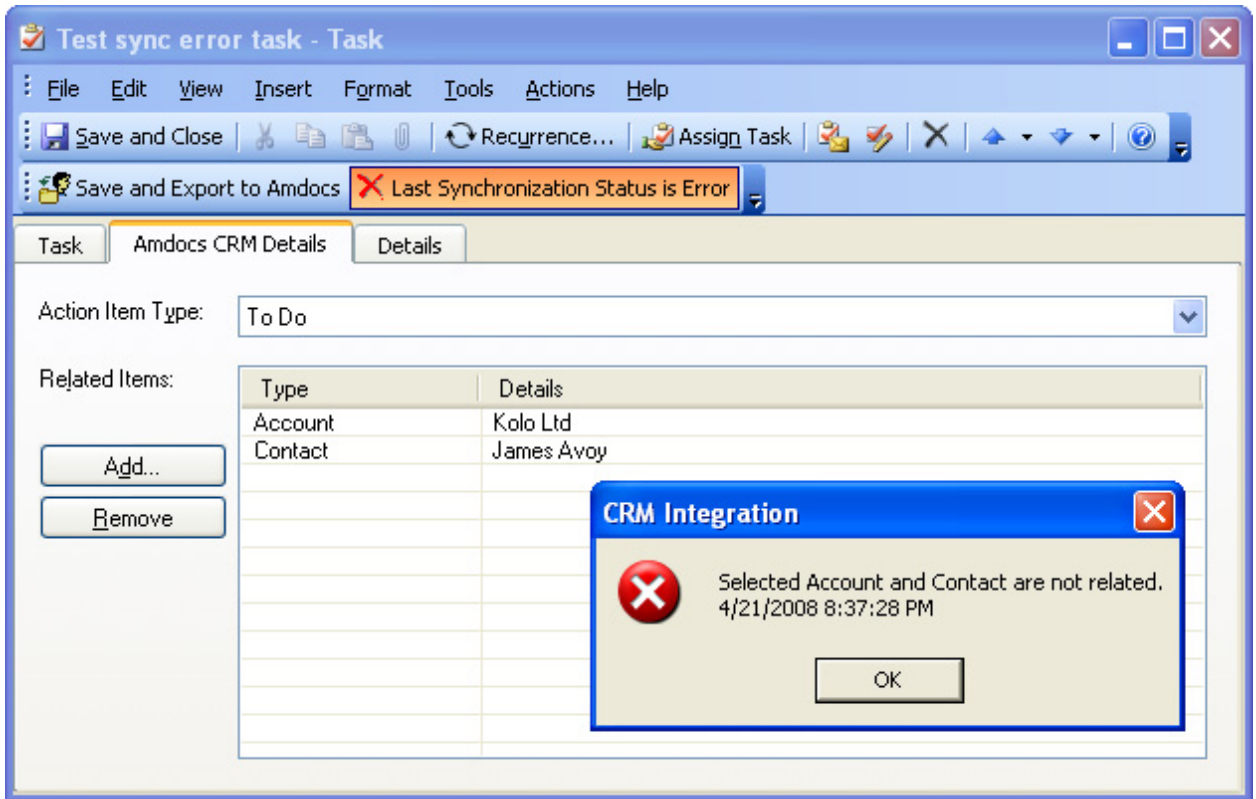


Fig. 25

Note attaching unrelated Accounts and Opportunities also leads to similar error type, with corresponding error message.

4. Export Contacts from Amdocs CRM

When you export Contacts from Amdocs CRM to Outlook using the 'Add to Outlook' button make sure that MS Outlook is started and successfully connected to the Amdocs CRM server. Following message pops up if Outlook is not running. (Fig. 26).

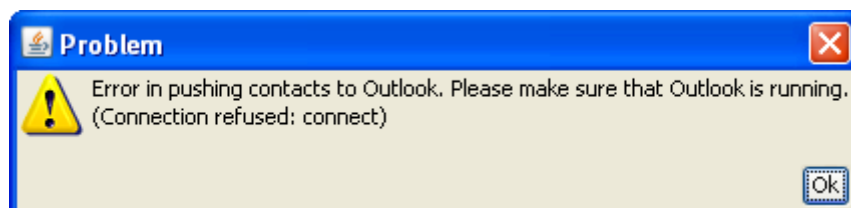


Fig. 26

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5. Contact/Account relationship for Emails

While exporting to CRM email message from/to one of your CRM contacts/leads, do not attach account/opportunities, not related to this Contact/Lead. Otherwise you get unrelated objects type of error after synchronization (Fig. 27).

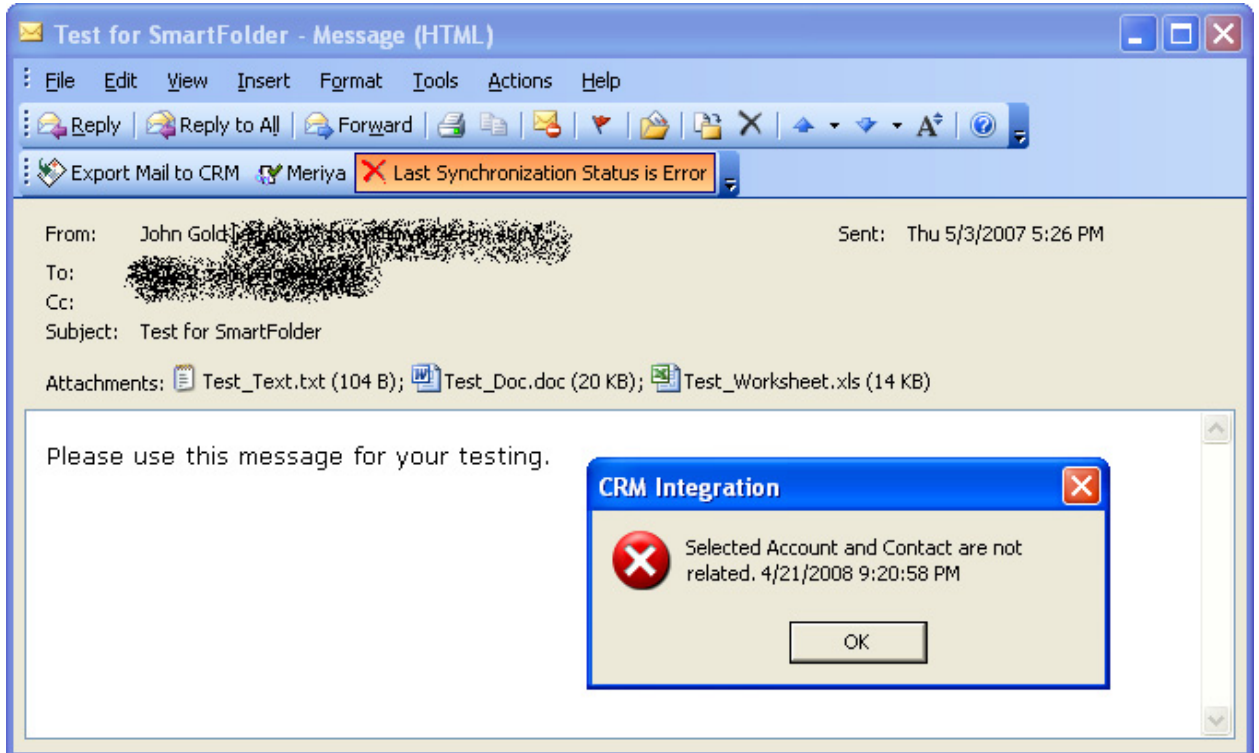


Fig. 27

6. Identical Contacts.

While creating contacts you cannot create Contacts with a first name, last name and phone number combination, matching existing in a CRM Contact.

You will get an error (Fig. 28).

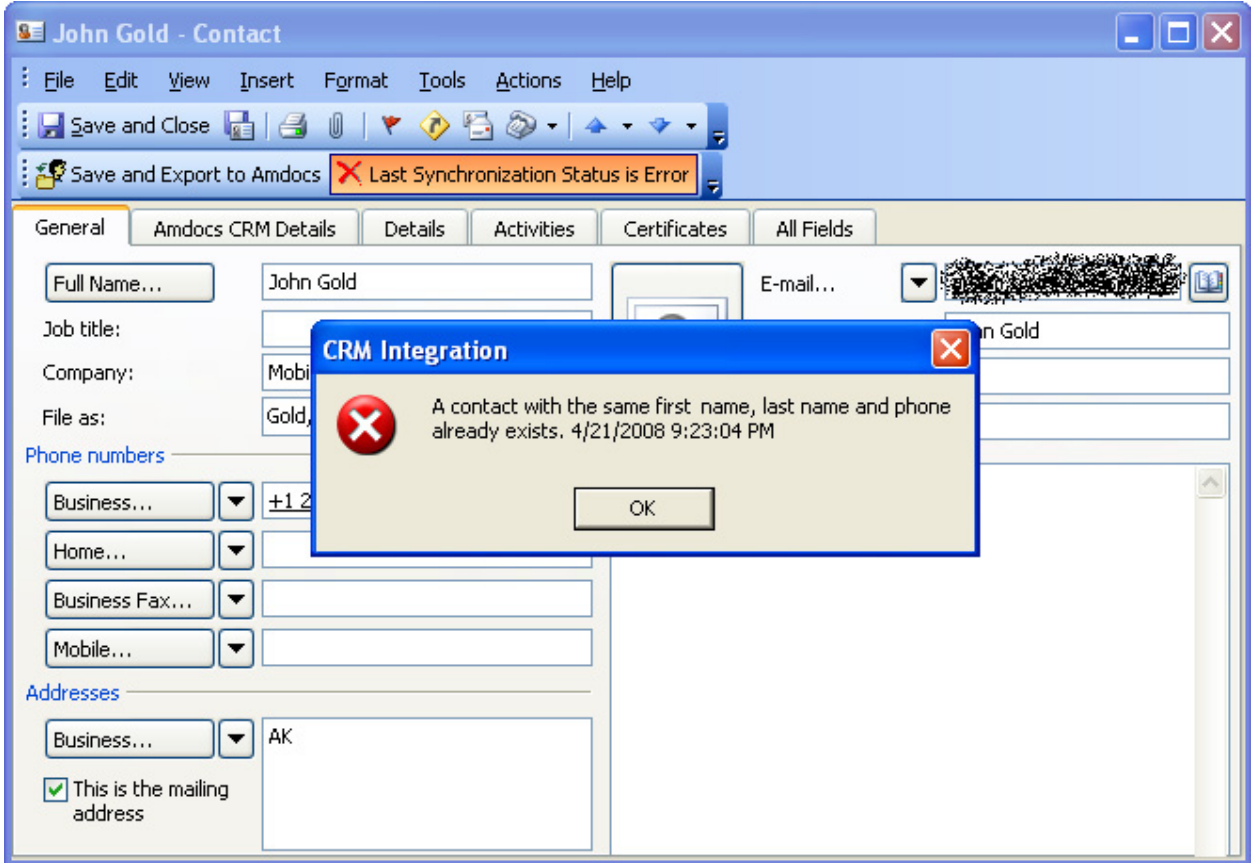


Fig. 28

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7. Object fields length exceeds predefined values.

Do not synchronize objects with field's length that exceed values, predefined in Amdocs CRM. E.g. Contact phone number length cannot exceed 20 symbols. Otherwise synchronization will not succeed (Fig. 29)

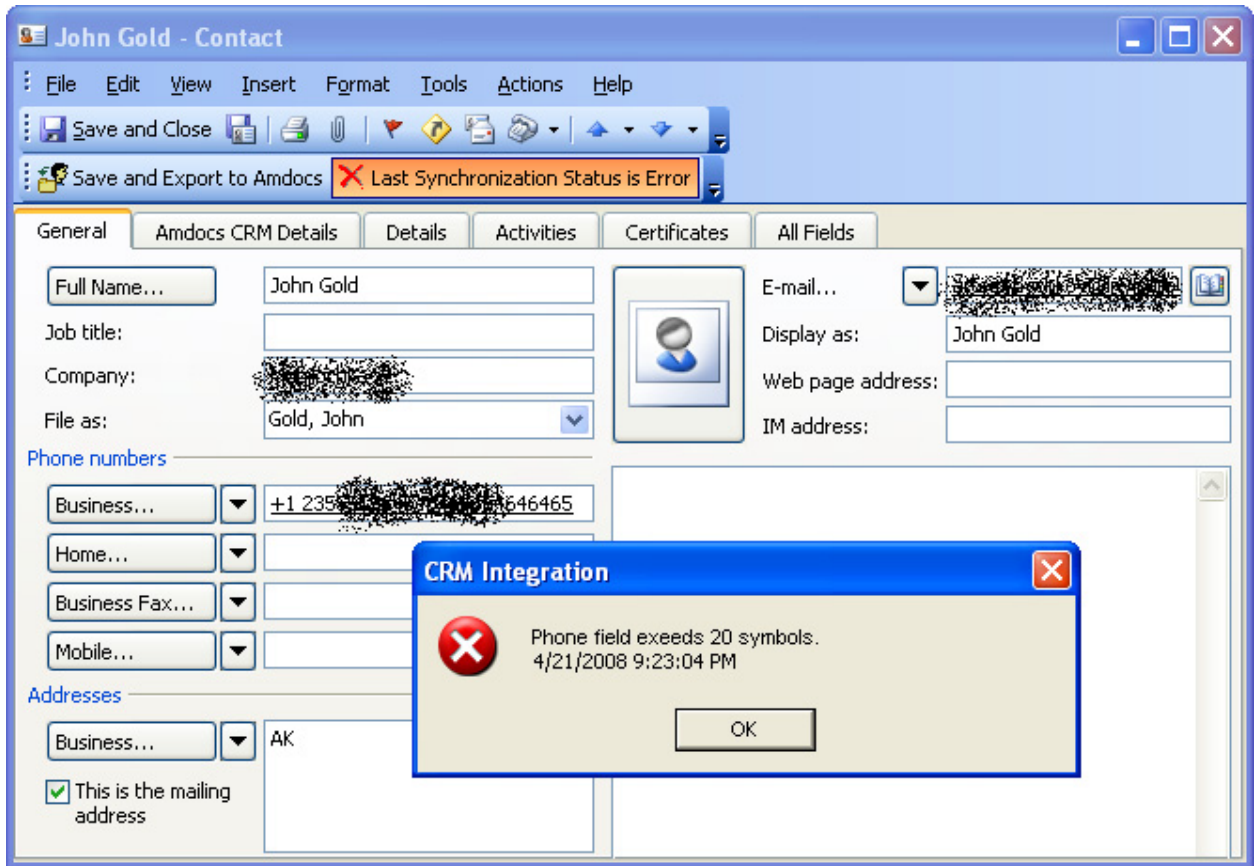


Fig. 29

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8. Ownership problems

If you try to update task or action item, created by other Amdocs CRM user (e.g. you changed username in 'Amdocs CRM Options' tab), you'll get following error (Fig. 30)

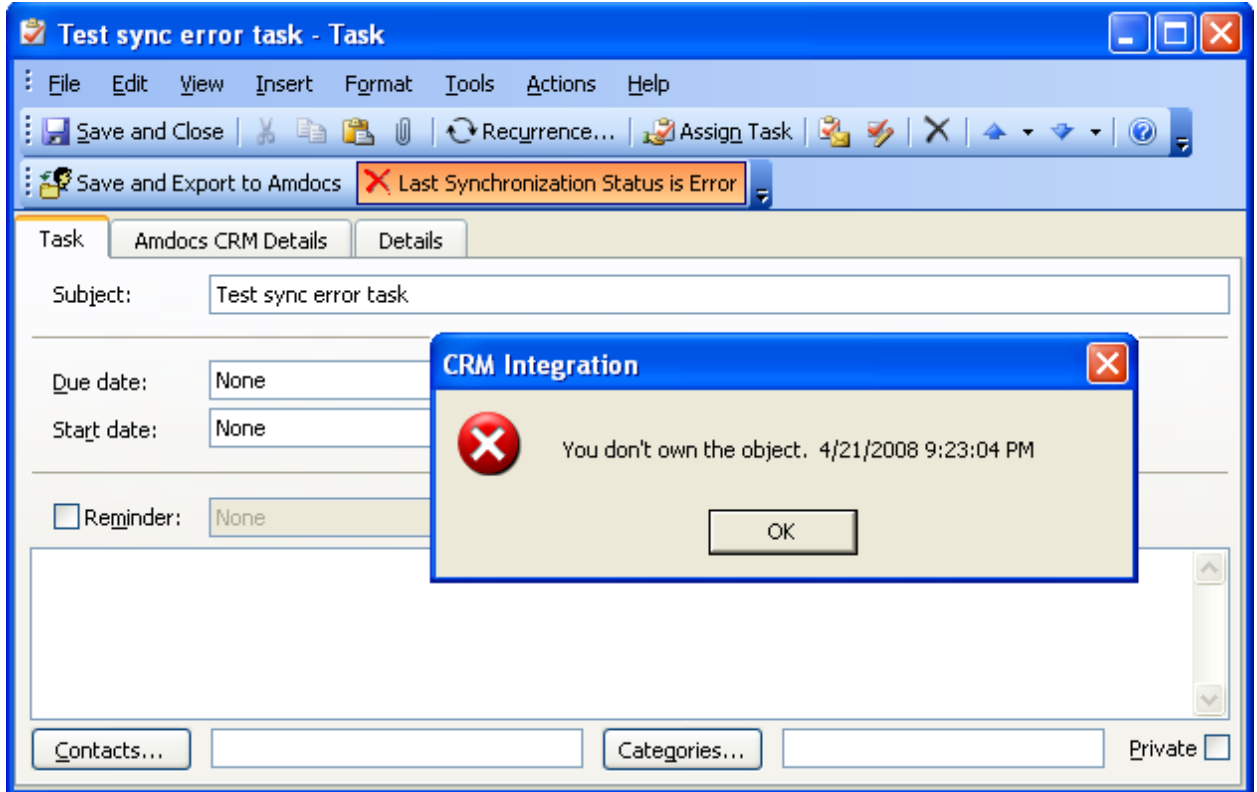


Fig. 30

Note, also refer to Known Issues section if you do not find description of your problem in Troubleshooting section.

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9. Licensing problems

License support is being handled by the system administrator. You have to be within the list of the named users to be able to use Oi4A product. If you get any kind of error messages, concerning licenses, in the event viewer (Fig. 31), please contact your system administrator.

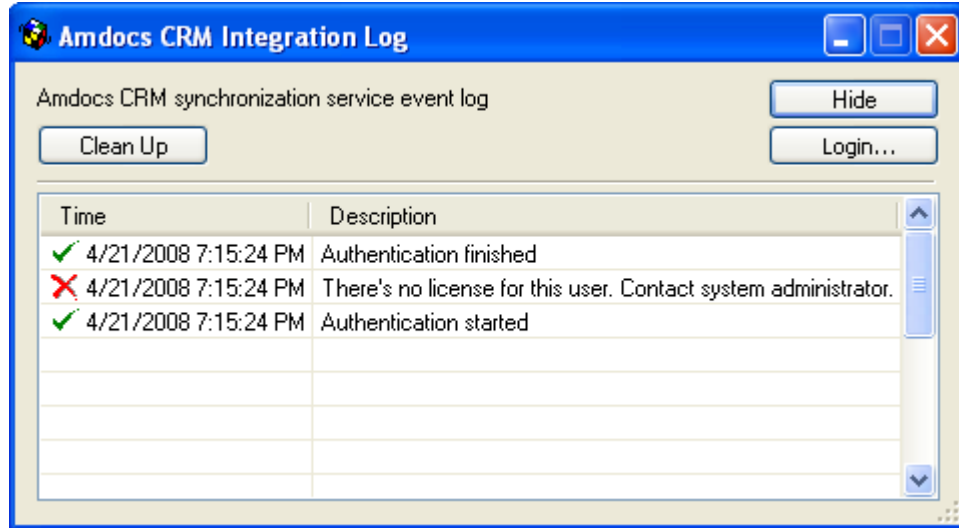


Fig. 31



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Chapter 8

Resolving collisions

In This Chapter

Resolving collisions

There is a possible situation when two different sales persons Sale 1 and Sale 2 want to initially synchronize information about the same contact with Amdocs CRM (Fig. 32)

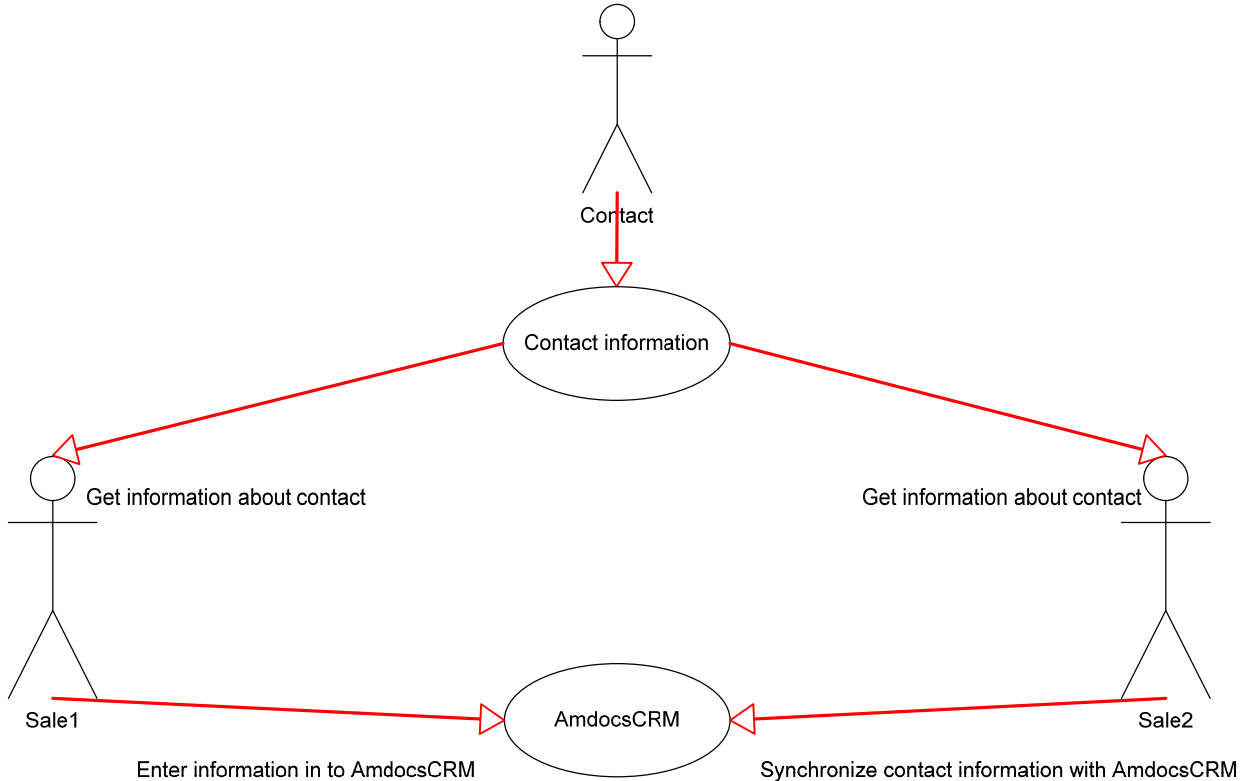


Fig. 32

In this case if Sale 1 and Sale 2 try to synchronize identical contact information, the one who does that later, get identical contact error (see 'Troubleshooting', part 6). So he/she can export this existing Contact from Amdocs CRM.

Another type of collision happens when Sale 1 and sale 2 synchronize the same Contact and modify information about this Contact later.

You can see the scheme when Sale 1 automatically gets updated information about Contact on fig. 33 however it was not he/she who updated the Contact.

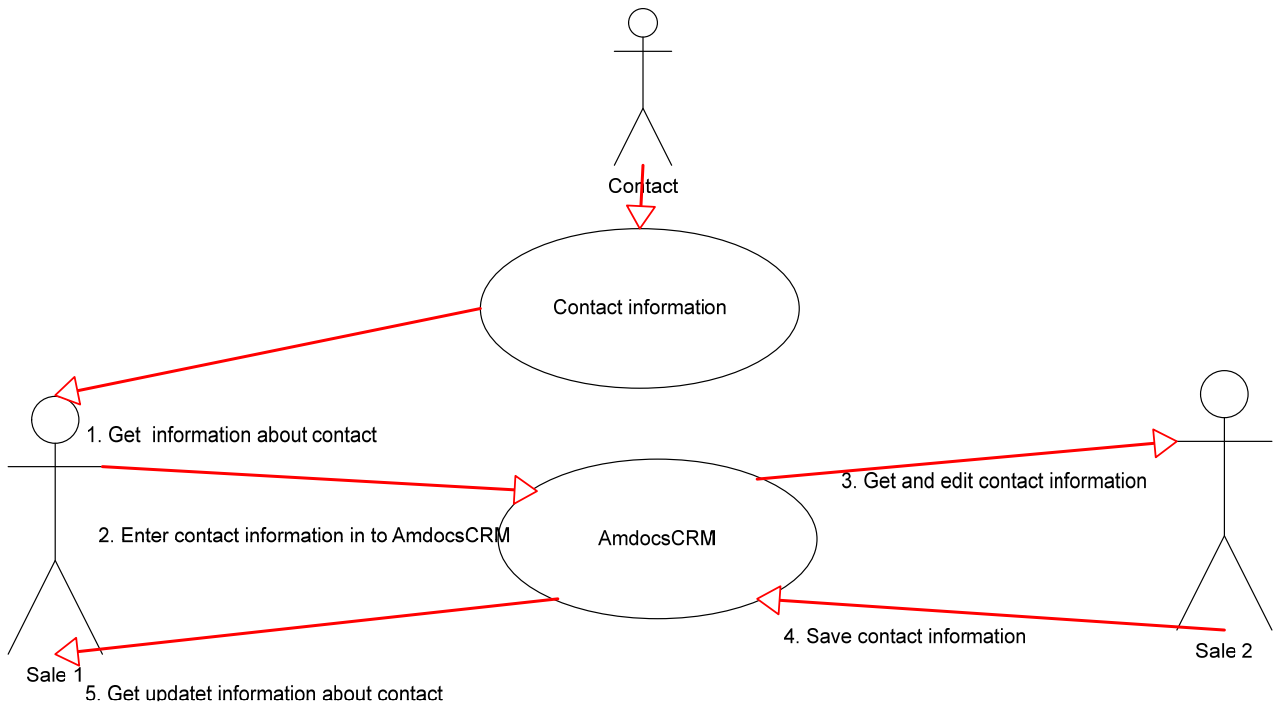


Fig. 33

Even more interesting case is described on fig.34 Let both Sale 1 and Sale 2 modify Contact information between two subsequent synchronization cycles. But let's assume Sale 2 was the first to synchronize the change. Then Collision for Sale 1 is resolved in the following manner. Sale 1 either overwrites Sale 2 changes if his/her 'Primary database' option is set to be Outlook. Or adopts Sale 2 changes if 'Primary Database' was set to be Amdocs CRM. (Refer to Configuration Chapter to see how to set 'Primary database' setting).

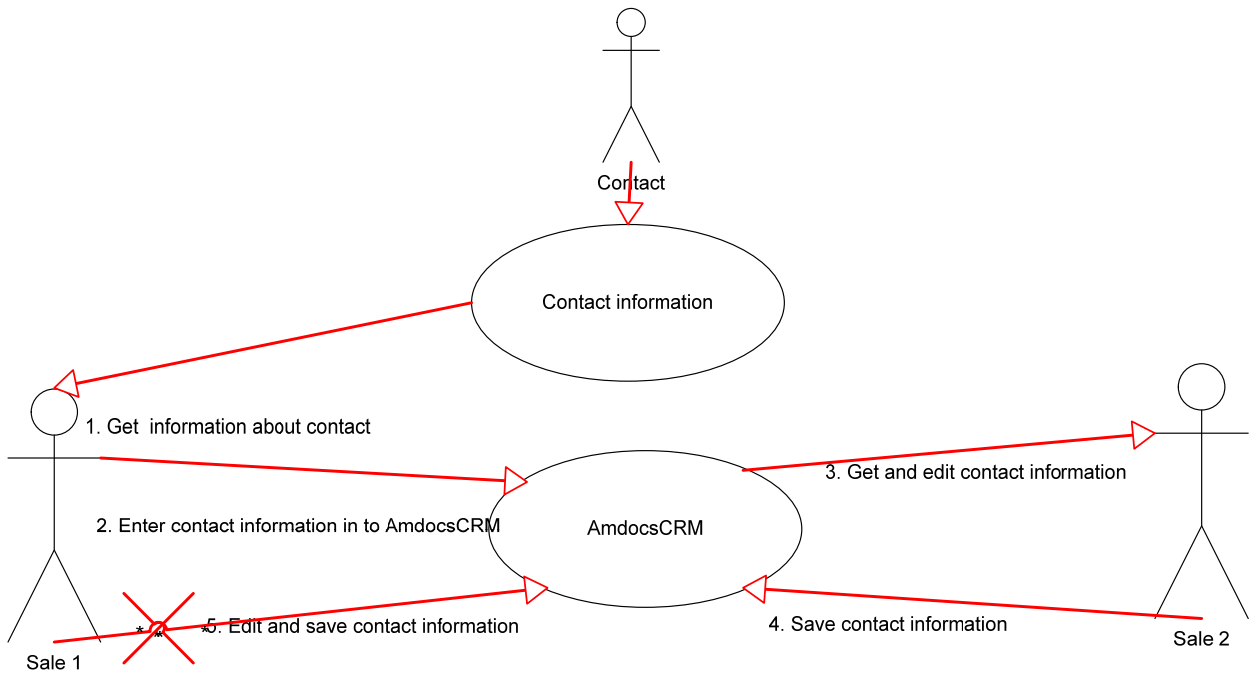


Fig. 34