



Application Notes for DATEL Call SWEET! Live CRM Integration with Avaya IP Office 8.0 – Issue 1.0

Abstract

These Application Notes describe the configuration steps required for DATEL Call SWEET! Live CRM Integration to interoperate with Avaya IP Office 8.0. DATEL Call SWEET! Live is a contact center management solution, and CRM Integration is an optional component that supports retrieval of calling party information from existing CRM application and make available to answering agents.

In the compliance testing, DATEL Call SWEET! Live CRM Integration used the calling party number in DevLink events from Avaya IP Office, to retrieve associated customer data from a database and populate on the answering agent's desktop.

Information in these Application Notes has been obtained through DevConnect compliance testing and additional technical discussions. Testing was conducted via the DevConnect Program at the Avaya Solution and Interoperability Test Lab.

1. Introduction

These Application Notes describe the configuration steps required for DATEL Call SWEET! Live CRM Integration to interoperate with Avaya IP Office 8.0. DATEL Call SWEET! Live is a contact center management solution, and CRM Integration is an optional component that supports retrieval of calling party information from existing CRM application and make available to answering agents.

DATEL Call SWEET! Live's integration with third party CRM applications is not the focus of these Application Notes, and will not be described. The compliance testing used a SQL table to emulate the CRM application database.

The focus of testing is on CRM Integration use of calling party number from received DevLink events as part of the basic DATEL Call SWEET! Live integration with Avaya IP Office, to retrieve associated customer data from the emulated CRM application database, and to populate the retrieved data on the answering agent's desktop.

2. General Test Approach and Test Results

The feature test cases were performed manually. Inbound calls were manually made from the PSTN, and necessary user actions such as answer and drop were performed from the agent telephones to test the various call scenarios.

The serviceability test cases were performed manually by disconnecting and reconnecting the Ethernet cable to the Call SWEET! Live server.

DevConnect Compliance Testing is conducted jointly by Avaya and DevConnect members. The jointly-defined test plan focuses on exercising APIs and/or standards-based interfaces pertinent to the interoperability of the tested products and their functionalities. DevConnect Compliance Testing is not intended to substitute full product performance or feature testing performed by DevConnect members, nor is it to be construed as an endorsement by Avaya of the suitability or completeness of a DevConnect member's solution.

2.1. Interoperability Compliance Testing

The interoperability compliance test included feature and serviceability testing.

The feature testing focused on verifying the following scenarios from CRM Integration: calling party number lookup, calling party data retrieval and desktop population, non-existent number, personal call, hunt group call, transfer, and multiple agents.

The serviceability testing focused on verifying the ability of CRM Integration to recover from adverse conditions, such as disconnecting and reconnecting the Ethernet cable to the Call SWEET! Live server.

2.2. Test Results

All test cases were executed and verified. The one observation from the compliance testing is that the current release of CRM Integration does not support population of customer data on the conference-to user desktops.

2.3. Support

Technical support on CRM Integration can be obtained through the following:

- **Phone:** (724) 940-0400
- **Email:** support@datel-group.com

3. Reference Configuration

The configuration used for the compliance testing is shown below.

These Application Notes assume the basic Call SWEET! Live integration with IP Office using TFTP and DevLink are already in place according to [3] and will not be described.

The detailed administration of general contact center devices such as hunt groups and agents are assumed to be in place, and are not covered in these Application Notes.

In the compliance testing, the used contact center devices are shown in the listing below.

Device Type	Extension
Hunt Group	21000
Agent Users	21251, 21253

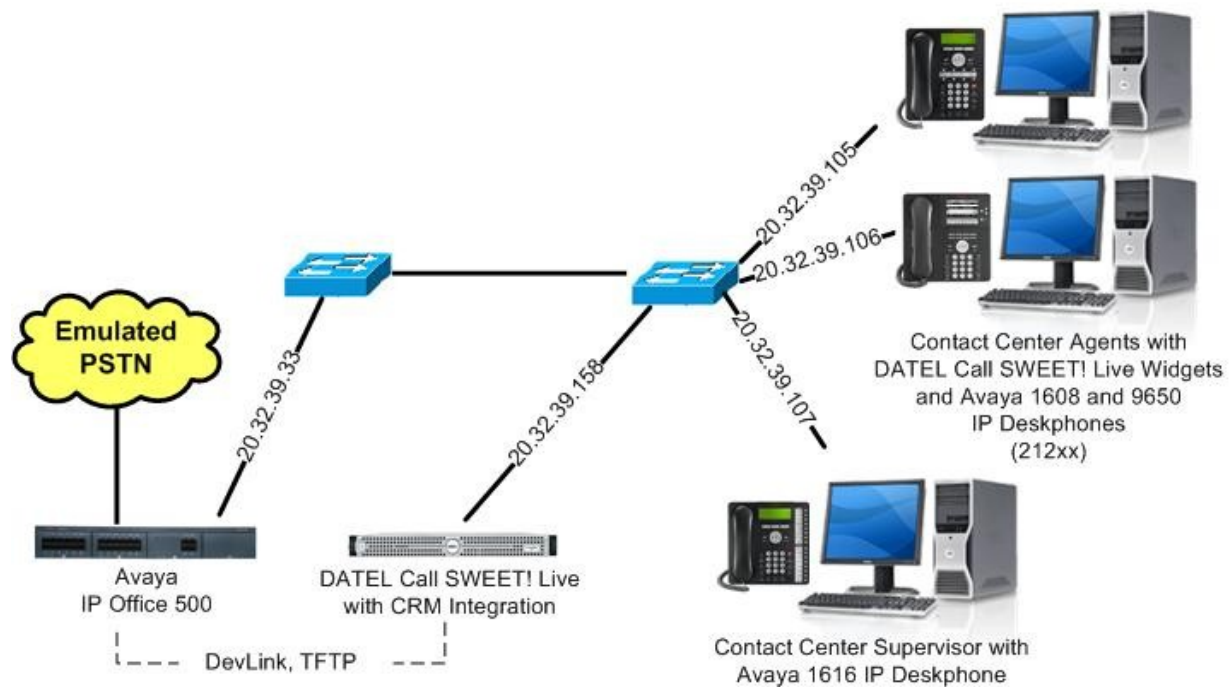


Figure 1: Compliance Testing Configuration

4. Equipment and Software Validated

The following equipment and software were used for the sample configuration provided:

Equipment	Software
Avaya IP Office 500	8.0 (18)
Avaya 16xx Series IP Deskphones (H.323)	1.300B
Avaya 9650 Series IP Deskphone (H.323)	3.186a
DATEL Call SWEET! Live CRM Integration on Windows 2008 Server with Service Pack 2 <ul style="list-style-type: none">Avaya DevLink (devlink.dll)	7.10.15.208 1.0.0.5
DATEL Call SWEET! Live Widgets	7.10.3.204a

5. Configure Avaya IP Office

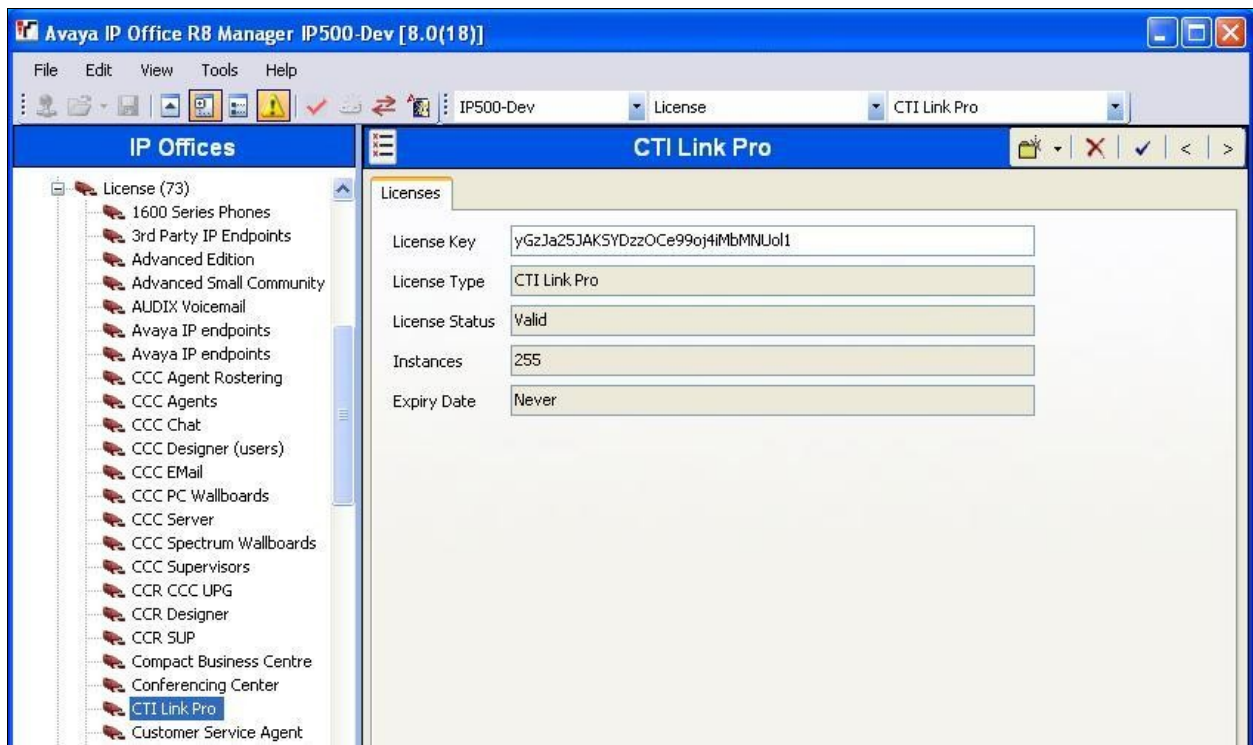
This section provides the procedures for configuring IP Office. The procedures include the following areas:

- Verify IP Office license
- Obtain agent user data

5.1. Verify IP Office License

From a PC running the IP Office Manager application, select **Start > Programs > IP Office > Manager** to launch the application. Select the proper IP Office system, and log in with the appropriate credentials.

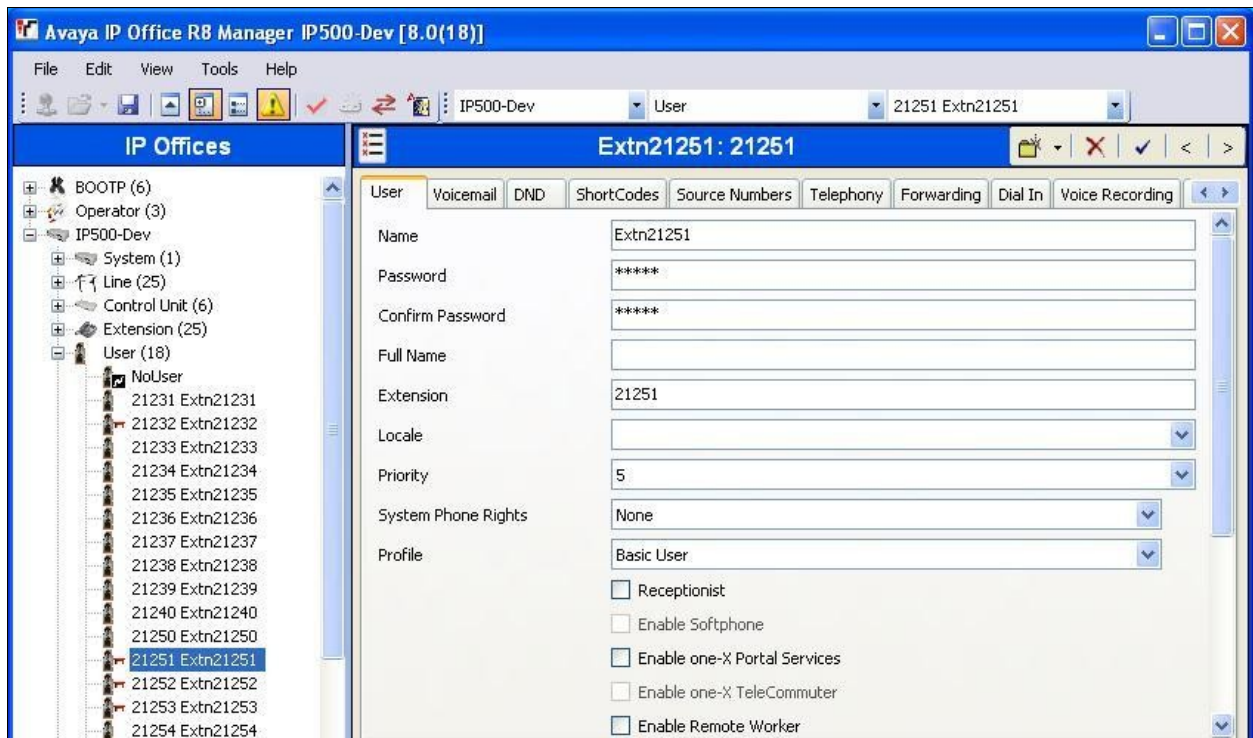
The **Avaya IP Office R8 Manager** screen is displayed. From the configuration tree in the left pane, select **License > CTI Link Pro** to display the **CTI Link Pro** screen in the right pane. Verify that the **License Status** is “Valid”.



5.2. Obtain Agent User Data

From the configuration tree in the left pane, select the first agent user from **Section 3**, in this case “21251”. Make a note of the **Name** and **Extension** values, which will be used later to configure CRM Integration.

Repeat this section for all agent users from **Section 3**.



6. Configure DATEL Call SWEET! Live CRM Integration

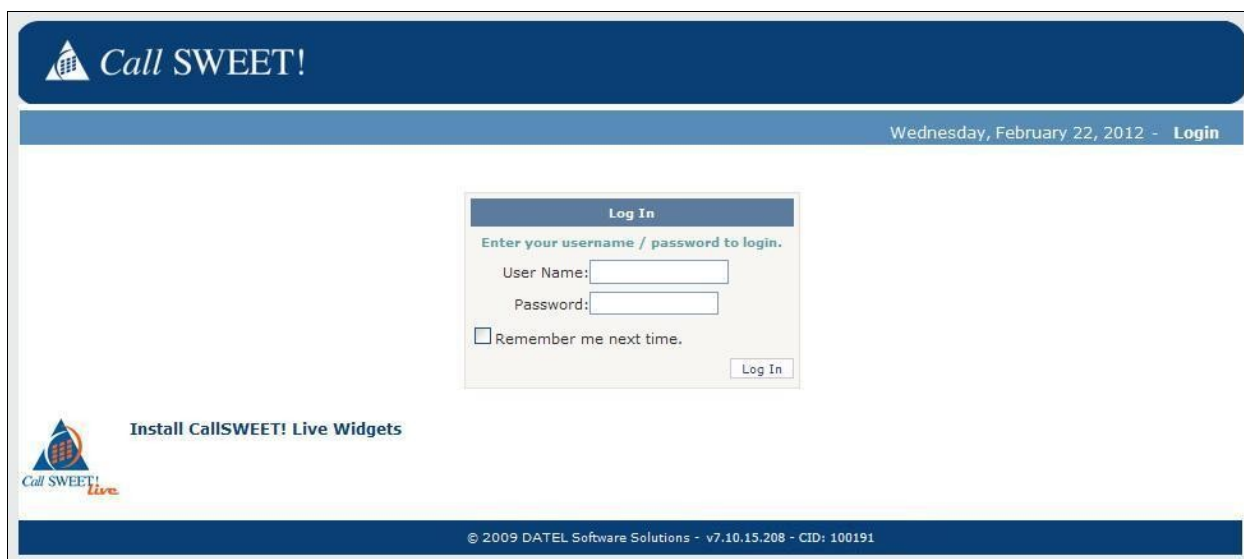
This section provides the procedures for configuring CRM Integration. The procedures include the following areas:

- Launch Call SWEET! Live
- Administer users
- Administer user data

The configuration of CRM Integration is typically performed by DATEL support technicians or DATEL business partners. The procedural steps are presented in these Application Notes for informational purposes.

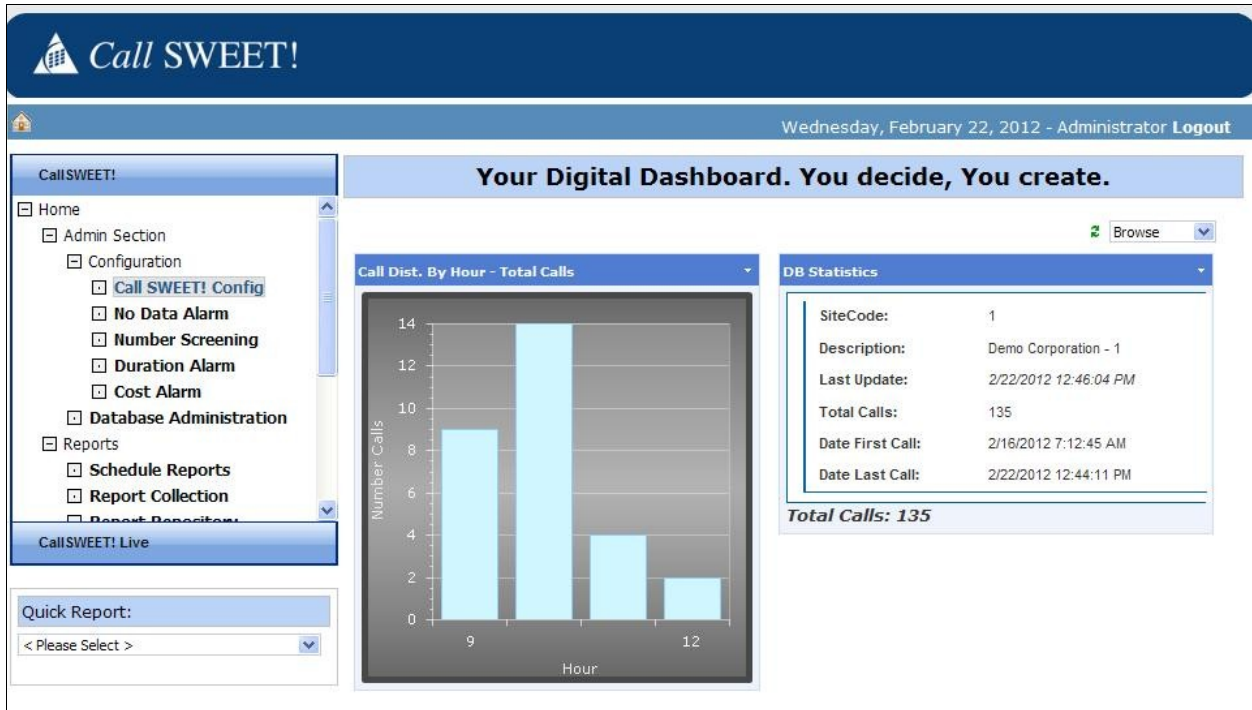
6.1. Launch Call SWEET! Live

Access the Call SWEET! Live web-based interface by using the URL “http://ip-address/callsweet” in an Internet browser window, where “ip-address” is the IP address of Call SWEET! Live. The **Log In** screen is displayed as shown below. Log in using the appropriate credentials.



The screenshot displays the Call SWEET! Live web interface. At the top, there is a dark blue header with the Call SWEET! logo and the text "Call SWEET!". Below the header, a light blue bar shows the date "Wednesday, February 22, 2012" and a "Login" link. The main content area is white and features a central "Log In" form. The form has a title "Log In" and a prompt "Enter your username / password to login." It includes two input fields: "User Name:" and "Password:". Below these fields is a checkbox labeled "Remember me next time." and a "Log In" button. In the bottom left corner of the main area, there is a logo for "Call SWEET! live" and a link that says "Install CallSWEET! Live Widgets". At the very bottom, a dark blue footer contains the copyright information: "© 2009 DATEL Software Solutions - v7.10.15.208 - CID: 100191".

The screen below is displayed. Select **Home > Admin Section > Configuration > Call SWEET! Config** from the left pane.



6.2. Administer Users

The **Call SWEET! Configuration** screen is displayed. Select the **System / Report Users** tab, and click **Add new record** to add a new user.



The **Call SWEET! Configuration** screen is updated with the **Modify User Account** section shown below.

For **Username**, **Password**, and **Password Again**, enter the desired credentials for the first agent user from **Section 3**.

The screenshot shows the 'Call SWEET! Configuration' interface. At the top, there is a navigation bar with the following tabs: 'System / Report Users', 'Security Roles', 'Security Permissions', 'System Settings', 'Archive', and 'Licensing'. Below the navigation bar, the current security mode is 'DATEL Integrated'. There is an 'Add new record' button and a 'Refresh' button. The main content area is titled 'Modify User Account:' and contains the following form fields:

- Select roles that user will be a member.**
- Current Mode: [User Insert]
- Username: agent21251
- Password: [Masked]
- Password Again: [Masked]
- Email: [Empty]
- Use Basic Widget ScreenPop

Repeat this section for all agent users. In the compliance testing, two agent users were configured as shown below.

The screenshot shows the 'Call SWEET! Configuration' interface with a list of users. The navigation bar and current security mode are the same as in the previous screenshot. The list of users is as follows:

User Name:	LastActivityDate
administrator	2/22/2012
agent21251	2/22/2012
agent21253	2/22/2012

At the bottom of the page, there is a footer: © 2009 DATEL Software Solutions - v7.10.12.207 - CID: 100191

6.3. Administer User Data

Select the pencil icon associated with the first agent user, in this case “agent21251”. The **Call SWEET! Configuration** screen is updated with the **Modify User Account** section.

Scroll down to the **Unlock User** section. For **Extension** and **Agent Id**, enter the corresponding agent user extension and name from **Section 5.2** respectively. For **Security Roles**, select the desired role. Repeat this section for all users from **Section 6.2**.

The screenshot displays the 'Call SWEET! Configuration' web interface. At the top, there is a navigation bar with the 'Call SWEET!' logo and the text 'Home : Admin Section : Configuration : Call SWEET! Config'. The date and user information 'Wednesday, February 22, 2012 - Administrator Logout' are shown on the right. Below the navigation bar, there are tabs for 'System / Report Users', 'Security Roles', 'Security Permissions', 'System Settings', 'Archive', and 'Licensing'. The current security mode is 'DATEL Integrated'. A table lists users with columns for 'User Name' and 'LastActivityDate'. The user 'agent21251' is highlighted in yellow, and a red circle is drawn around the pencil icon next to it. Below the table, the 'Modify User Account' section is active. It includes a 'Select roles that user will be a member.' section with a 'Current Mode: [User Edit]' indicator. The 'Username' field contains 'agent21251'. There is a 'Change User's Password' dialog box with fields for 'User Name', 'Password', 'New Password', and 'Confirm New Password'. Below this are buttons for 'Reset Password' (with a note '(Will reset the user's password to an autogenerated one)') and 'Unlock User'. The 'Email' and 'Full Name' fields are empty. The 'Extension' field contains '21251' and the 'Agent Id' field contains 'Extn21251'. There are two checkboxes: 'Can apply VR Categories' and 'Use Basic Widget ScreenPop', both of which are unchecked. At the bottom, there is a 'Security Roles' section with a list of available roles: 'Administrators', 'Power Users', and 'Users'. The 'Administrators' role is selected. An 'Add Current User to Selected Role' button is located at the bottom of the list.

7. Verification Steps

This section provides the tests that can be performed to verify proper integration between IP Office and CRM Integration.

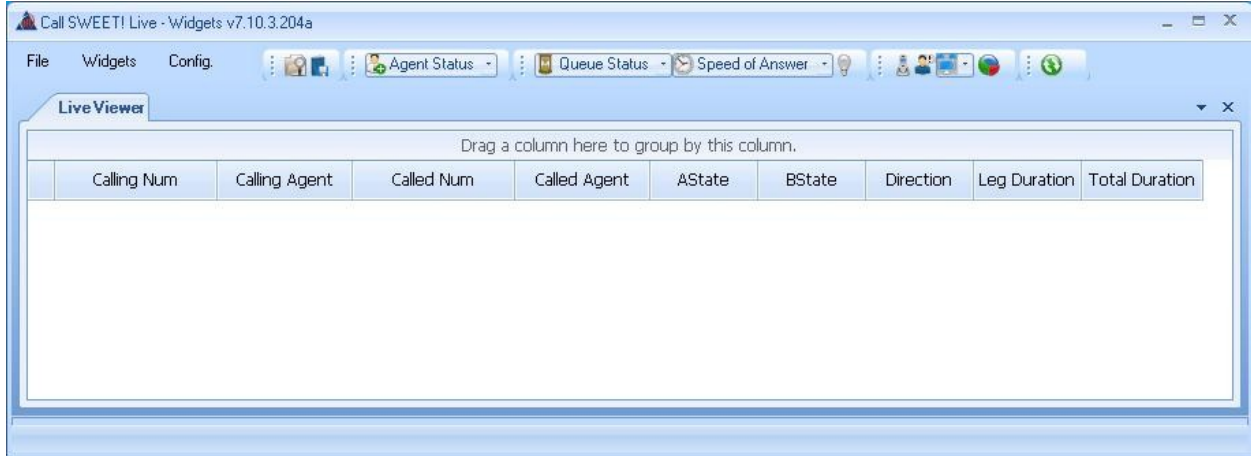
From the agent PC running DATEL Call SWEET! Live Widgets, select **Start > All Programs > CallSWEET! Live – Widgets > Call SWEET! Live – Widgets** to launch the application and log in with the appropriate credentials from **Section 6.2**.



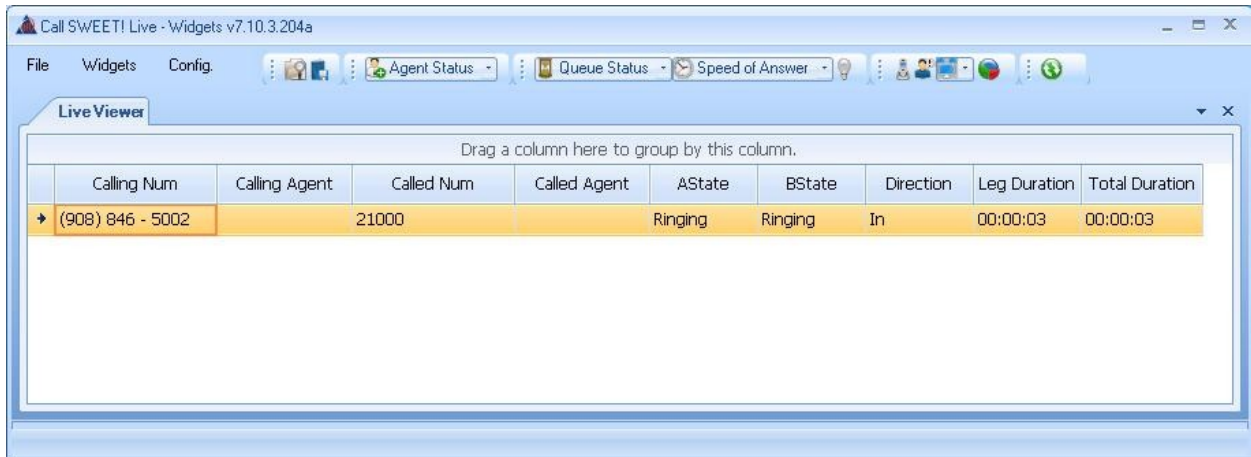
The **Call SWEET! Live – Widgets** screen is displayed. Select **Widgets > Live Viewer** from the top menu, as shown below.



The screen is updated with the **Live Viewer** tab, as shown below.



Make an incoming call from the PSTN to the hunt group. Verify that the call is ringing at the agent's telephone, and that the **Call SWEET! Live - Widgets** screen is updated with an entry reflecting the active call in the "Ringing" state.



Answer the call at the agent's telephone. Verify that the states are updated to "Connected", as shown below.

Calling Num	Calling Agent	Called Num	Called Agent	AState	BState	Direction	Leg Duration	Total Duration
→ (908) 846 - 5002		21000	Extn21251	Connected	Connected	In	00:00:05	00:00:08

Also verify that the **CRM Alert** pop-up screen is displayed, and that the screen contains the proper customer data associated with the PSTN calling number from the CRM database.



8. Conclusion

These Application Notes describe the configuration steps required for DATEL Call SWEET! Live CRM Integration to successfully interoperate with Avaya IP Office 8.0. All feature and serviceability test cases were completed with an observation noted in **Section 2.2**.

9. Additional References

This section references the product documentation relevant to these Application Notes.

1. *IP Office 8.0 Knowledge Base Documentation CD*, December 2011, available at <http://support.avaya.com>.
2. *CRM Integration*, available upon request to DATEL Support.
3. *Application Notes for DATEL Call SWEET! Live with Avaya IP Office 8.0 – Issue 1.0*, available at <http://support.avaya.com>.

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