



Avaya Solution & Interoperability Test Lab

Application Notes for DATEL UCCS CRM Integration with Avaya IP Office 9.0 – Issue 1.0

Abstract

These Application Notes describe the configuration steps required for DATEL UCCS CRM Integration to interoperate with Avaya IP Office 9.0. DATEL UCCS 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 UCCS CRM Integration used the calling party number in the 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 UCCS CRM Integration to interoperate with Avaya IP Office 9.0. DATEL UCCS 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 UCCS CRM Integration with third party CRM application 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 the testing is on CRM Integration use of calling party number received from DevLink events as part of the basic DATEL UCCS Business Edition integration with Avaya IP Office, and on the retrieval of associated customer data from the emulated CRM application database to populate 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 connection to the UCCS 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 connection to the UCCS server.

2.2. Test Results

All test cases were executed and passed.

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 UCCS Business Edition integration with IP Office using TFTP and DevLink are already in place according to [2] 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	29000
Agent Users	20031, 20032

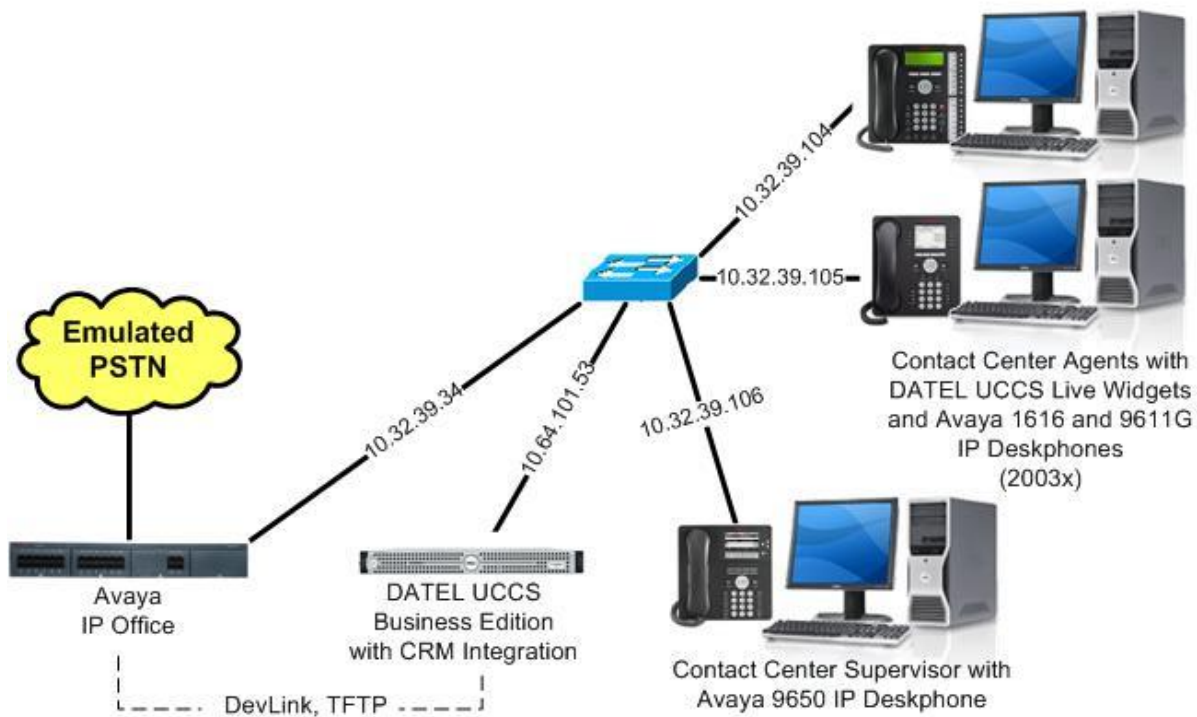


Figure 1: Compliance Testing Configuration

4. Equipment and Software Validated

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

Equipment/Software	Release/Version
Avaya IP Office on IP500V2	9.0 SP1 (9.0.100.845)
Avaya 1616 IP Deskphone (H.323)	1.343A
Avaya 9611G IP Deskphone (H.323)	6.3037
Avaya 9650 IP Deskphone (H.323)	3.212A
DATEL UCCS Business Edition on Windows 2008 Server with Service Pack 2 <ul style="list-style-type: none">• CRM Alerting• Avaya DevLink (devlink.dll)	7.10.62.219 7.10.63.219 1.0.0.5
DATEL UCCS Business Edition Widgets	7.10.49.212

Testing was performed with IP Office 500 V2 R9.0, but it also applies to IP Office Server Edition R9.0. Note that IP Office Server Edition requires an Expansion IP Office 500 V2 R9.0 to support analog or digital endpoints or trunks. IP Office Server Edition does not support TAPI Wave or Group Voicemail.

5. Configure Avaya IP Office

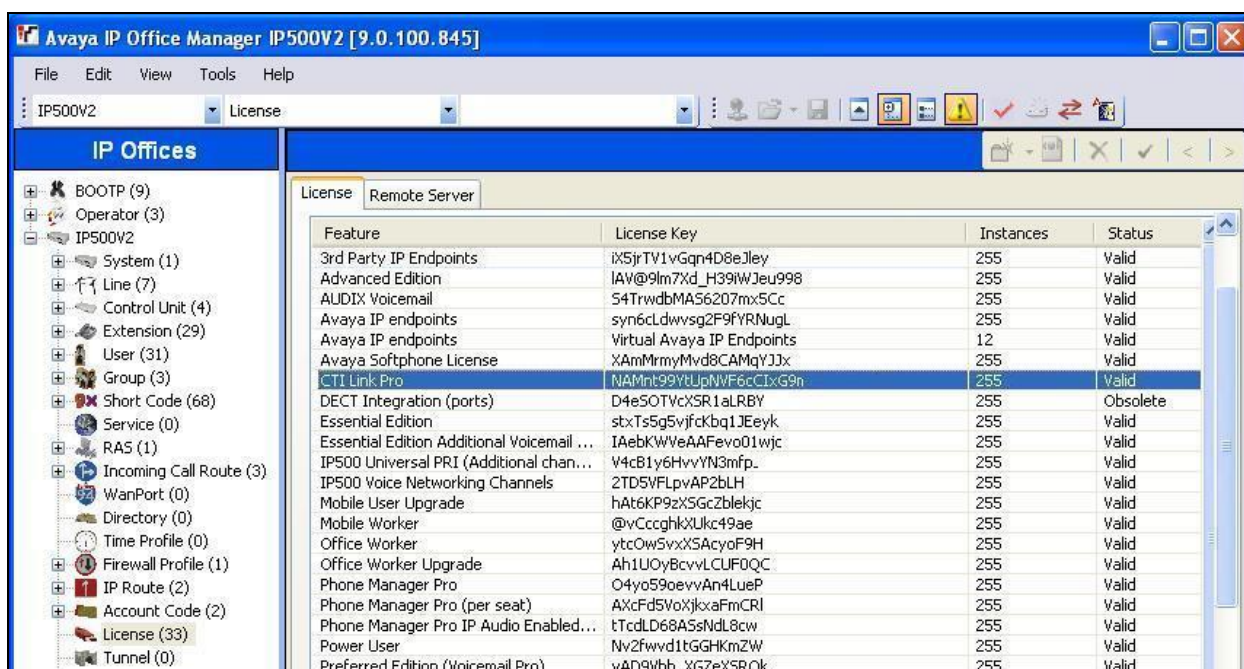
This section provides the procedures for configuring IP Office. The procedures include the following areas:

- Verify license
- Obtain agent user data

5.1. Verify License

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

The **Avaya IP Office R9 Manager** screen is displayed. From the configuration tree in the left pane, select **License** to display a list of licenses in the right pane. Verify that there is a license for **CTI Link Pro** and that the **Status** is “Valid”, as shown below.

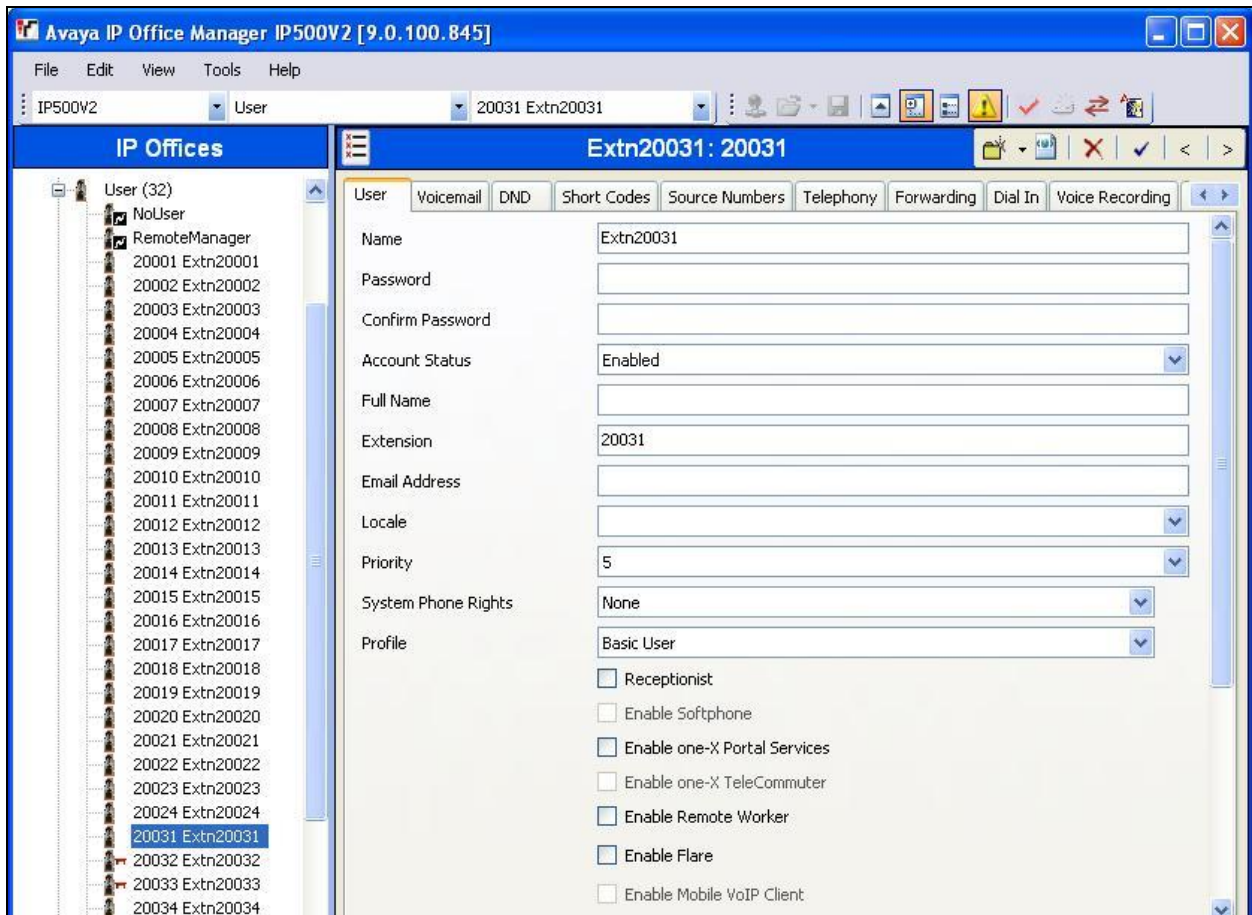


Feature	License Key	Instances	Status
3rd Party IP Endpoints	ix5jrTV1vGqn4D6eJley	255	Valid
Advanced Edition	IAW@9lm7Xd_H39IWJeu998	255	Valid
AUDIX Voicemail	54TrwdbMA56207mx5CC	255	Valid
Avaya IP endpoints	syn6cLdwysg2F9fYRNugL	255	Valid
Avaya IP endpoints	Virtual Avaya IP Endpoints	12	Valid
Avaya Softphone License	XAmMrmYmvd8CAMqYJJx	255	Valid
CTI Link Pro	NAMnt99YtUpNWF6cCIxG9n	255	Valid
DECT Integration (ports)	D4e50TvcXSR1aLRBY	255	Obsolete
Essential Edition	stxTs5g5vjfckbq1JEeyk	255	Valid
Essential Edition Additional Voicemail ...	IAebKWVeAAFevo01wjc	255	Valid
IP500 Universal PRI (Additional chan...	V4cB1y6HvvYN3mfp.	255	Valid
IP500 Voice Networking Channels	2TD5VFLpvAP2bLH	255	Valid
Mobile User Upgrade	hAt6KP9zXSgcZblekjc	255	Valid
Mobile Worker	@vCccghkXLUkc49ae	255	Valid
Office Worker	ytCOW5vxXSAcyoF9H	255	Valid
Office Worker Upgrade	Ah1UOyBcvvLCUFQOC	255	Valid
Phone Manager Pro	O4yo59oevvAn4LueP	255	Valid
Phone Manager Pro (per seat)	AXcFd5VoXjKxaFmCRI	255	Valid
Phone Manager Pro IP Audio Enabled...	tTcdLD68ASsNdl8cw	255	Valid
Power User	Nv2fwvd1tGGHkmZW	255	Valid
Preferred Edition (Voicemail Pro)	yAD9Vbh_XGZeXSROK	255	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 “20031”. 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 UCCS CRM Integration

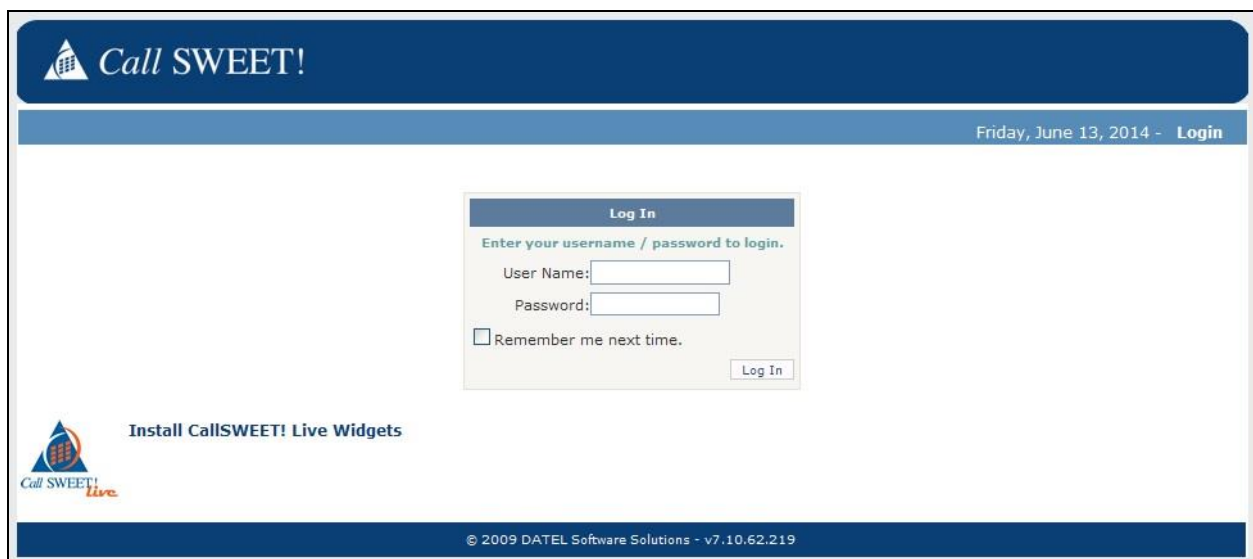
This section provides the procedures for configuring CRM Integration. The procedures include the following areas:

- Launch web interface
- Administer users
- Administer user data

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

6.1. Launch Web Interface

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

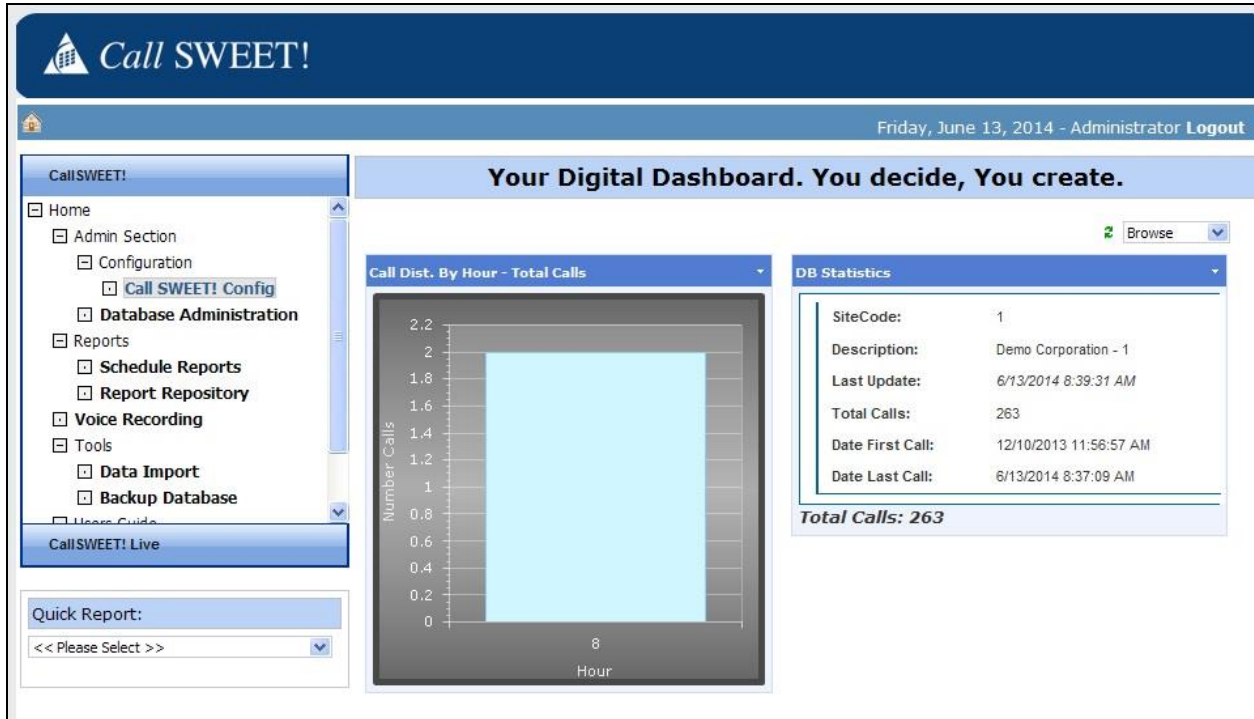


The screenshot shows the Call SWEET! web interface. At the top left is the Call SWEET! logo. At the top right, it displays the date and time: "Friday, June 13, 2014 - Login". In the center, there is a "Log In" form with the following fields and options:

- Header: Log In
- Instruction: Enter your username / password to login.
- User Name:
- Password:
- Remember me next time:
- Log In button:

At the bottom left, there is a link to "Install CallSWEET! Live Widgets" with a small logo. At the bottom center, the copyright information reads: "© 2009 DATEL Software Solutions - v7.10.62.219".

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** sub-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 'Home : Admin Section : Configuration : Call SWEET! Config' and the date 'Friday, June 13, 2014 - Administrator Logout'. Below this is a sub-header 'Call SWEET! Configuration' and a menu with 'System / Report Users', 'Security Roles', 'Security Permissions', 'System Settings', 'Archive', and 'Licensing'. The current security mode is 'DATEL Integrated'. There is an 'Add new record' button and a 'Refresh' button. A table with columns 'User Name:' and 'LastActivityDate' is partially visible. Below the table is a 'Modify User Account:' section with the instruction 'Select roles that user will be a member.' and 'Current Mode: [User Insert]'. The form includes fields for 'Username:' (agent20031), 'Password:' (masked with dots), 'Password Again:' (masked with dots), and 'Email:'. There are also two checkboxes: 'Use Basic Widget ScreenPop' and 'Can View All Reports in Report Scheduler'.

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 sub-header are the same as in the previous screenshot. The 'Add new record' button is present. The table below shows the following data:

User Name:	LastActivityDate
administrator	6/13/2014
agent20031	6/13/2014
agent20032	6/13/2014

At the bottom of the page, there is a copyright notice: '© 2009 DATEL Software Solutions - v7.10.62.219'.

6.3. Administer User Data

Select the pencil icon associated with the first agent user, in this case “agent20031”. The **Call SWEET! Configuration** screen is updated with the **Modify User Account** sub-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 application. 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 'Friday, June 13, 2014 - Login' is shown in the top right. Below the navigation bar, the main heading is 'Call SWEET! Configuration'. A secondary navigation bar contains 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 'agent20031' is highlighted in yellow, and a red circle highlights 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 is populated with 'agent20031'. There are three sub-sections: 'Change User's Password' with fields for 'User Name', 'Password', 'New Password', and 'Confirm New Password'; 'Reset Password' with a button and a note '(Will reset the user's password to an autogenerated one)'; and 'Unlock User' with fields for 'Email', 'Full Name', 'Extension', and 'Agent Id'. Below these are three checkboxes: 'Can apply VR Categories' (unchecked), 'Use Basic Widget ScreenPop' (checked), and 'Can View All Reports in Report Scheduler' (unchecked). At the bottom, the 'Security Roles' section shows a list of available roles: 'Administrators', 'Power Users', and 'Users' (selected). An 'Add Current User to Selected Role' button is located below the list.

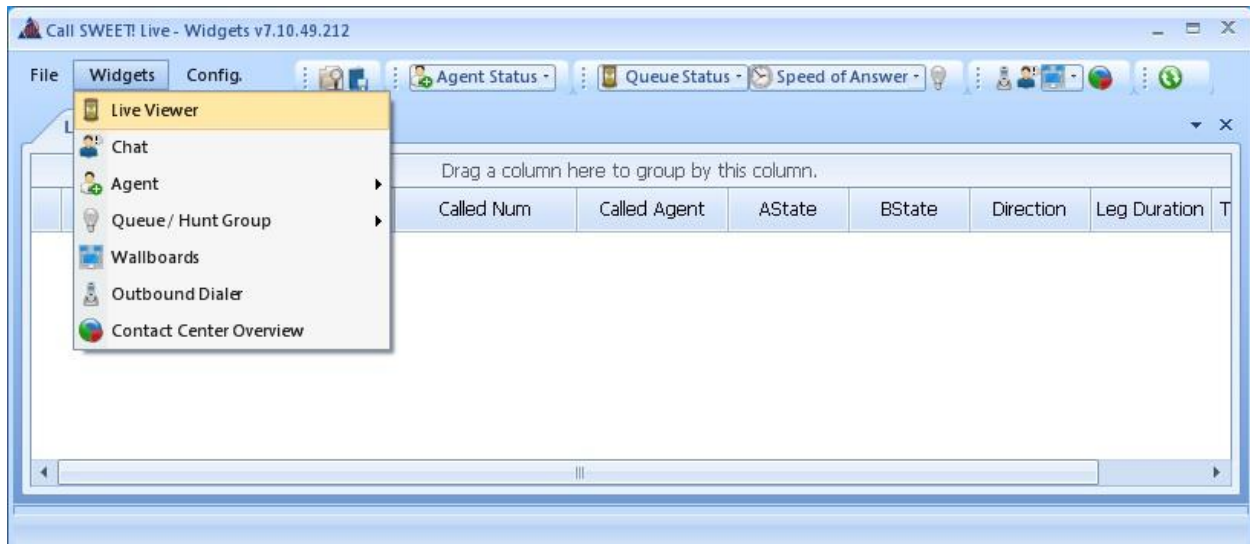
7. Verification Steps

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

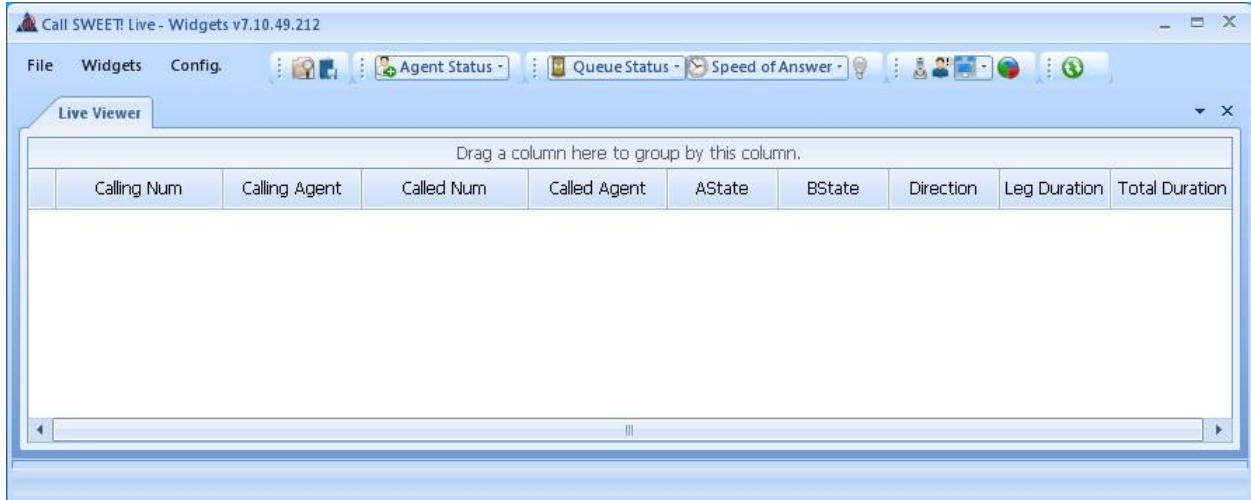
From the agent PC running the UCCS Business Edition Widgets application, select **Start** → **All Programs** → **CallSWEET! Live – Widgets** → **Call SWEET! Live – Widgets** to launch the application. Log in using the appropriate credentials from **Section 6.2**.



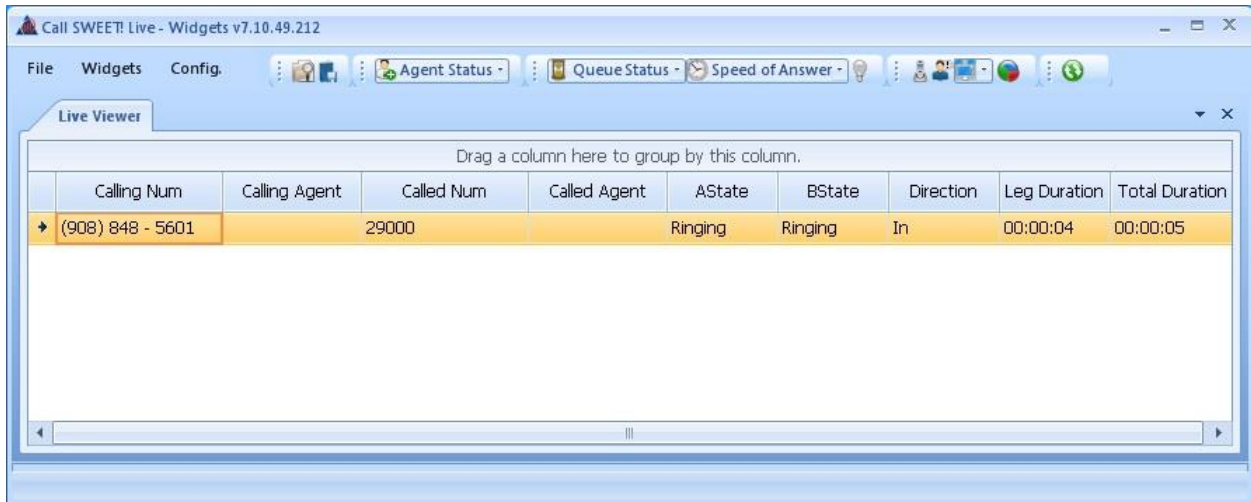
The **Call SWEET! Live – Widgets** screen is displayed. Select **Widgets** → **Live Viewer** from the top menu, as shown below.



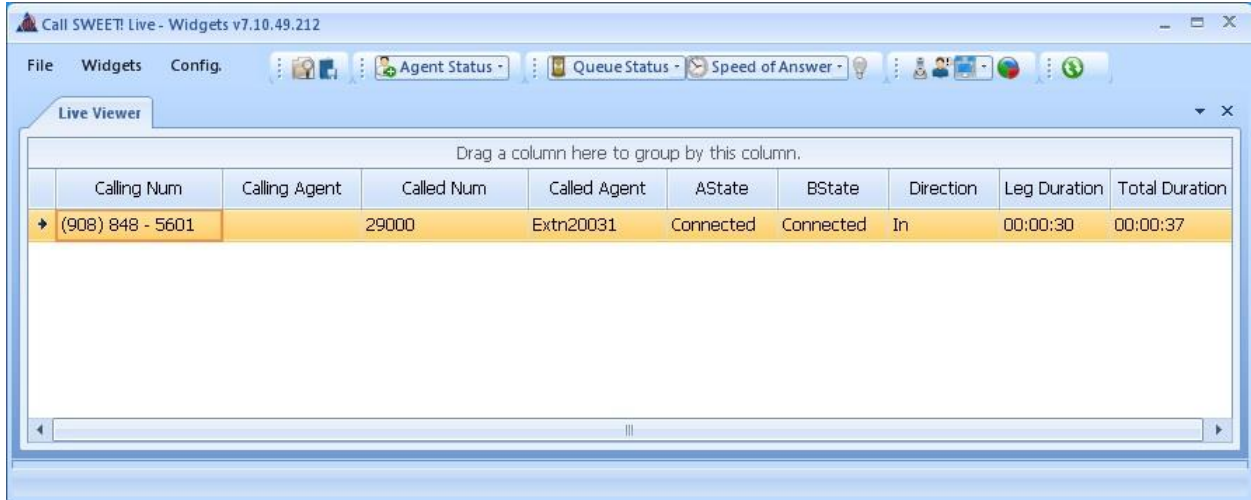
The screen is updated with the **Live Viewer** tab.



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, as shown below.



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



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 UCCS CRM Integration to successfully interoperate with Avaya IP Office 9.0. All feature and serviceability test cases were completed.

9. Additional References

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

1. *Avaya IP Office Manager*, Release 9.0, Issue 9.01, September 2013, Document Number 15-601011, available at <http://support.avaya.com>.
2. *Application Notes for DATEL UCCS Business Edition with Avaya IP Office 9.0 – Issue 1.0*, available at <http://support.avaya.com>.
3. *UCCS CRM Integration*, available upon request to DATEL Support.

©2014 Avaya Inc. All Rights Reserved.

Avaya and the Avaya Logo are trademarks of Avaya Inc. All trademarks identified by ® and ™ are registered trademarks or trademarks, respectively, of Avaya Inc. All other trademarks are the property of their respective owners. The information provided in these Application Notes is subject to change without notice. The configurations, technical data, and recommendations provided in these Application Notes are believed to be accurate and dependable, but are presented without express or implied warranty. Users are responsible for their application of any products specified in these Application Notes.

Please e-mail any questions or comments pertaining to these Application Notes along with the full title name and filename, located in the lower right corner, directly to the Avaya DevConnect Program at devconnect@avaya.com.