

GLBD-000073

Ed. 01

OfficeServ SOHO **CRM User Guide**

01. 2005.



COPYRIGHT

This manual is proprietary to SAMSUNG Electronics Co., Ltd. and is protected by copyright. No information contained herein may be copied, translated, transcribed or duplicated for any commercial purposes or disclosed to third parties in any form without the prior written consent of SAMSUNG Electronics Co., Ltd.

TRADEMARKS

Product names mentioned in this guide may be trademarks of the respective companies with which they are associated.

This manual should be read and used as a guideline for properly installing and operating the product.

This manual may be changed for the system improvement, standardization and other technical reasons without prior notice.

For further information on the updated manual or have a question for the content of manual, contact the address or homepage below.

**Address: Document Center 2nd Floor IT Center. Dong-Suwon P.O. Box 105, 416, Maetan-3dong
Yeongtong-gu, Suwon-si, Gyeonggi-do, Korea 442-600**

Homepage: <http://www.samsungdocs.com>



INTRODUCTION

Purpose

OfficeServ SOHO CRM(Customer Relationship Management) is a Voice Data Convergence(VDC) solution for PC, which interworks with the OfficeServ SOHO or mobile stations registered to the OfficeServ SOHO. This document describes procedures on registering/managing customers and on controlling calls through the OfficeServ SOHO CRM.

Document Content and Organization

This document contains 5 chapters and an annex, which are summarized as follows:

CHAPTER 1. Introduction to OfficeServ SOHO CRM

This chapter describes the overall features of OfficeServ SOHO CRM.

CHAPTER 2. Program Installation

This chapter describes preparations and procedures for installing the OfficeServ SOHO CRM program.

CHAPTER 3. Menu Description

This chapter describes the menus and usage of the OfficeServ SOHO CRM program.

CHAPTER 4. Customer Information Management

This chapter describes procedures for registering customer information to the OfficeServ SOHO CRM program and for searching the phonebook.

CHAPTER 5. Call Control

This chapter describes method of controlling the call functions of the OfficeServ SOHO through the OfficeServ SOHO CRM program.

ANNEX A. Abbreviation

This annex provides full names of the acronyms frequently used in this document.

Conventions

The following special paragraphs are used in this document to point out information that must be read. This information may be set-off from the surrounding text, but is always preceded by a bold title in capital letters.



CHECK

CHECKPOINT

Provides the operator with checkpoints for stable system operation.



NOTE

NOTE

Indicates additional information as a reference.

Reference

OfficeServ SOHO User Guide

This document describes the main features of OfficeServ SOHO, environmental setup procedure, procedures on making/receiving calls, and various other convenient features.

OfficeServ SOHO Web Management User Guide

This document describes the Web Management system of OfficeServ SOHO and its menus.

Revision History

EDITION	DATE OF ISSUE	REMARKS
00	08. 2004.	Original
01	01. 2005.	- Changing Configuration Menu and Template Menu(related to the SMS) - Deleting SMS Menu



This page is intentionally left blank.



TABLE OF CONTENTS

INTRODUCTION	I
Purpose	I
Document Content and Organization	I
Conventions.....	II
Reference	III
Revision History.....	III
CHAPTER 1. Introduction to OfficeServ SOHO CRM	1
OfficeServ SOHO CRM Overview	1
OfficeServ SOHO CRM Function.....	2
CHAPTER 2. Program Installation	3
Preparations for Installation	3
Program Installation Procedure	4
CHAPTER 3. Menu Description	7
Toolbar Menu Window	7
Floating Window	8
Phonebook Menu.....	9
Add New User Menu.....	13
Calling History Menu	14
Configuration Menu.....	15
Line.....	16
Group	19
External Address Book	20
Template Menu.....	21

TABLE OF CONTENTS

Dialpad Menu	22
Help Menu	24
CHAPTER 4. Customer Information Management	25
Template Management	25
Entering Customer Information.....	28
External Address Book Registration.....	30
MS Outlook Address Book Synchronization.....	31
MS Excel Data Synchronization.....	33
Synchronization of OfficeServ SOHO Address Book Data	37
Searching Phonebook.....	40
CHAPTER 5. Call Control	43
Call Control	43
Making Calls.....	44
Making Intercom Calls	44
Making External Calls	46
Making a Call to the Recently Called Number	46
Answering Calls.....	47
Answering Intercom Calls	47
Answering External Calls	48
Call Pickup.....	50
Functions Available While Calling.....	50
Hold	50
Transfer	51
Conference Call	51
ANNEX A. Abbreviation	53
C ~ U	53
V ~ W.....	54



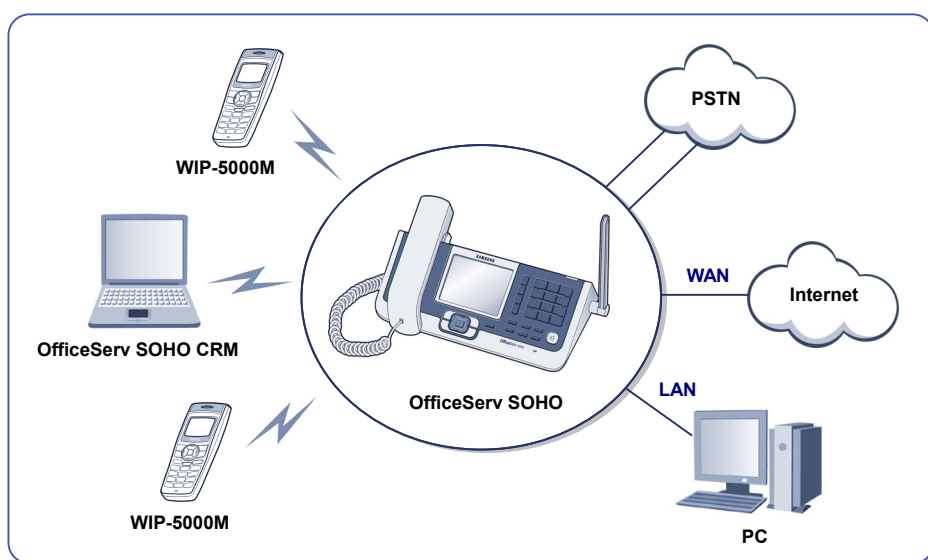
CHAPTER 1. Introduction to OfficeServ SOHO CRM

This chapter describes the overall features of OfficeServ SOHO CRM.

OfficeServ SOHO CRM Overview

OfficeServ SOHO CRM is a VDC solution running on PC, which interworks with the OfficeServ SOHO or with a mobile station registered to the OfficeServ SOHO. Users of OfficeServ SOHO can perform customer data management and call control through the OfficeServ SOHO CRM program. In addition, Microsoft Outlook/Excel format data can be used as phonebook data.

OfficeServ SOHO CRM interworks with the network as shown below:



OfficeServ SOHO CRM Function

OfficeServ SOHO CRM provides the following functions:

CID Based Customer Data Management

- Customer data management based on Caller Identification(CID)
- Customer DB configuration using template

Customer Address Book Management

- Synchronization with OfficeServ SOHO address book/phonebook
- Provides detail customer data

Call Control

Various call control functions can be performed from a PC through CTI(Computer Telephony Integration)

External Data Interwork

- Data interwork with Microsoft Outlook/Excel
- Convenient customer data entry through interworking with OfficeServ SOHO address book.



CHECK

Data Interwork Between OfficeServ SOHO and OfficeServ SOHO CRM Program

The network must be configured accordingly to support the data interwork between the OfficeServ SOHO and the OfficeServ SOHO CRM program. Refer to the 'Line' description of 'Configuration Menu' in 'Chapter 3. Menu Description' for detailed procedure on configuring the network.



CHAPTER 2. Program Installation

This chapter describes preparations and procedures for installing the OfficeServ SOHO CRM program.

Preparations for Installation

Check the following items before installing the OfficeServ SOHO CRM program:

System Requirements

Item	Specification
OS	MS Windows98/ME/2000/2003/XP-Home/XP-Pro or higher
CPU	Pentium III or higher
Memory	128 Mbytes or higher
HDD	500 Mbytes or higher
I/O port	USB port(interworking with card reader S/W)
Network	TCP/IP(wire/wireless LAN)
OfficeServ SOHO	OfficeServ SOHO Version 1.0 or higher

Items to Check

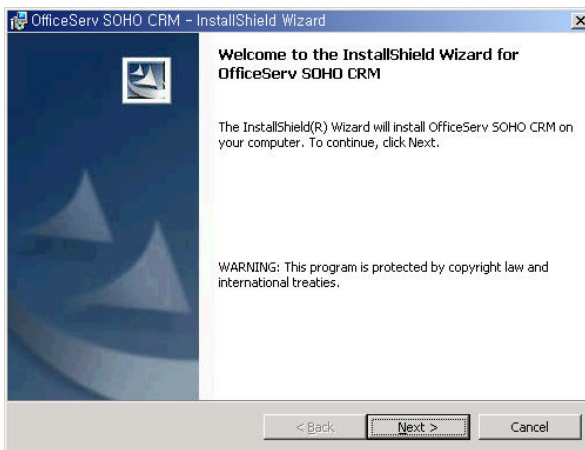
Verify the following items before installing the OfficeServ SOHO CRM program:

- IP address of the OfficeServ SOHO
- IP address and phone number of the phone interworking with the OfficeServ SOHO CRM program

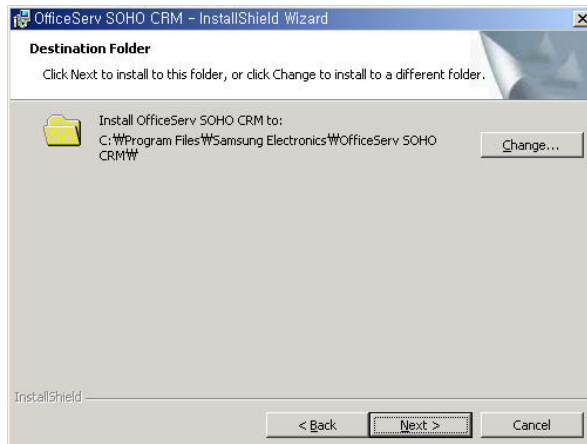
Program Installation Procedure

The procedure for installing a OfficeServ SOHO CRM program on a PC connected to OfficeServ SOHO is as follows:

1. Double click the 'Setup.exe' file in the PC where the OfficeServ SOHO CRM program should be installed.
2. The <InstallShield Wizard> window appears after the <Preparing Installation> window. Click the [Next>] button.

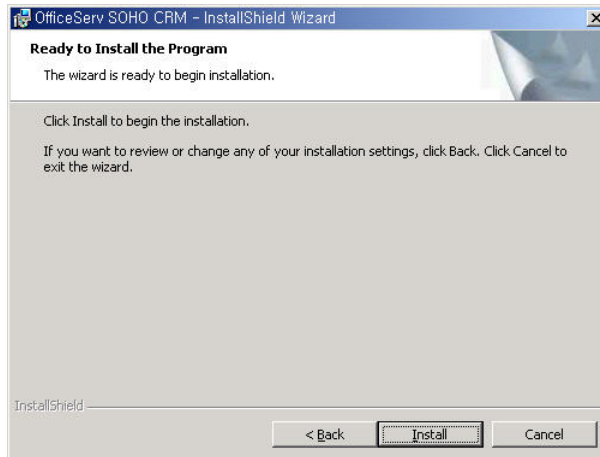


3. Confirm the installation folder from the <Destination Folder> window and click the [Next>] button.

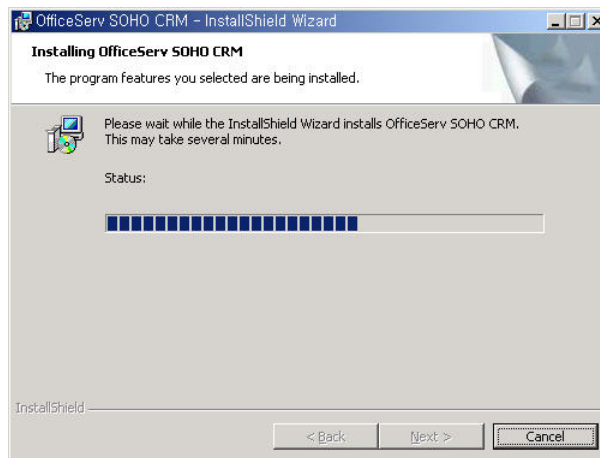


Otherwise, click the [Change...] button to select another folder.

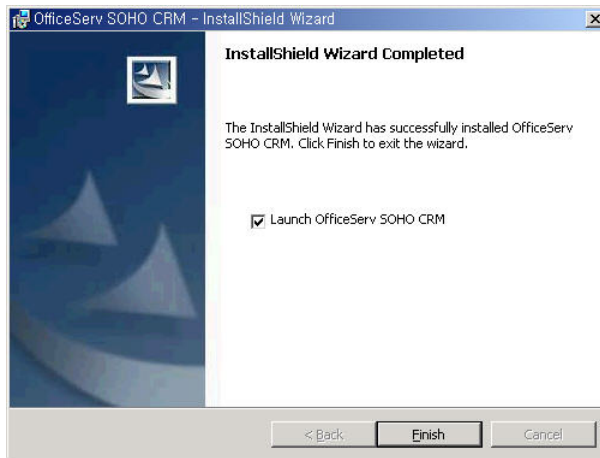
4. Click the [Install] button of the <Ready to Install the Program> window.



5. The <Installing OfficeServ SOHO CRM> window appears as the installation is started. Press the [Cancel] button to abort installation.



6. Click the [Finish] button of the <InstallShield Wizard Completed> window.



NOTE

Starting OfficeServ SOHO CRM Program After Installation

Select the 'Launch OfficeServ SOHO CRM' checkbox and click the [Finish] button of the <InstallShield Wizard Completed> window to start the OfficeServ SOHO CRM program after installation.

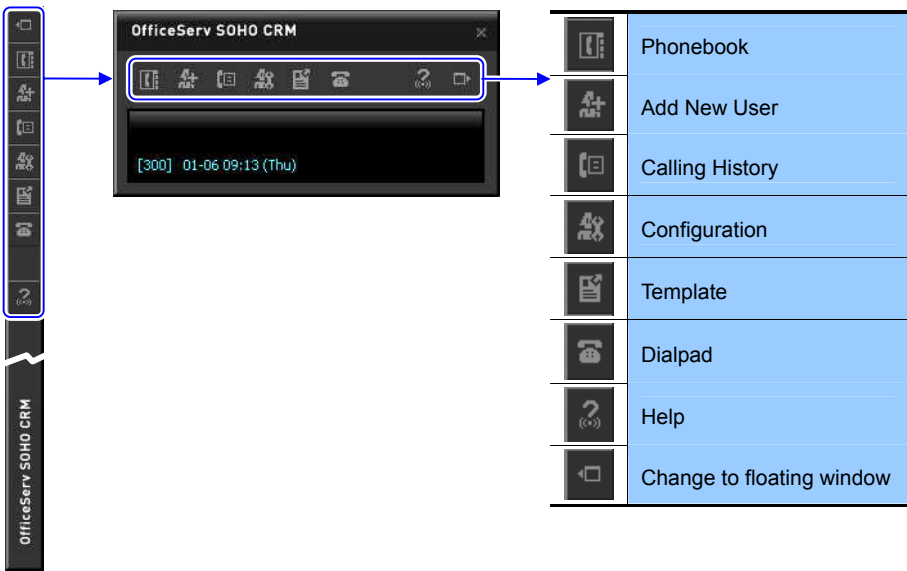


CHAPTER 3. Menu Description

This chapter describes the menus and usage of the OfficeServ SOHO CRM program.

Toolbar Menu Window

On executing the OfficeServ SOHO CRM program, the window shown below appears on the right side of the Windows desktop. This window is called the <Toolbar menu> window.



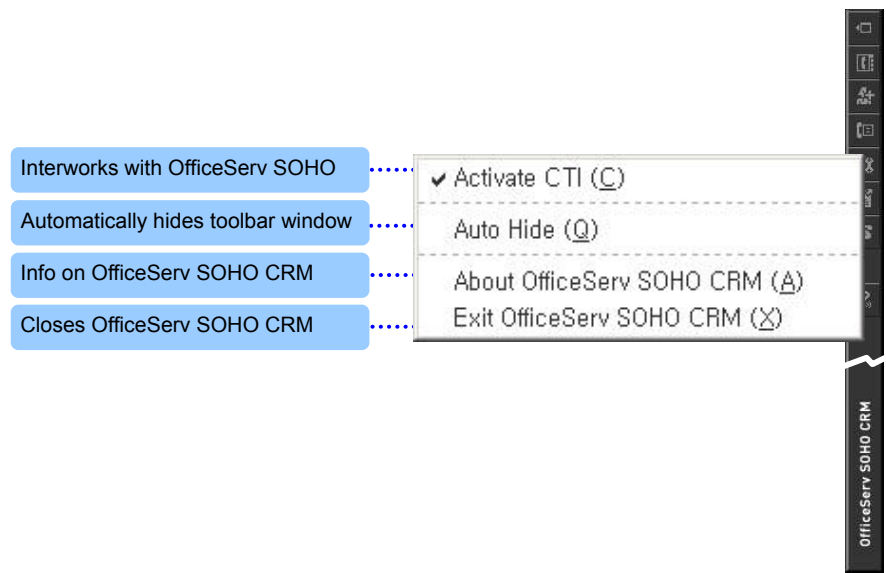
NOTE

When starting the Program for the First Time After Installation

When the OfficeServ SOHO CRM program is executed for the first time after installation, the IP address and intercom number of the OfficeServ SOHO is set to '192.168.111.1' and '300' by default. This setting can be changed at the [Line] tab of [Configuration] menu.

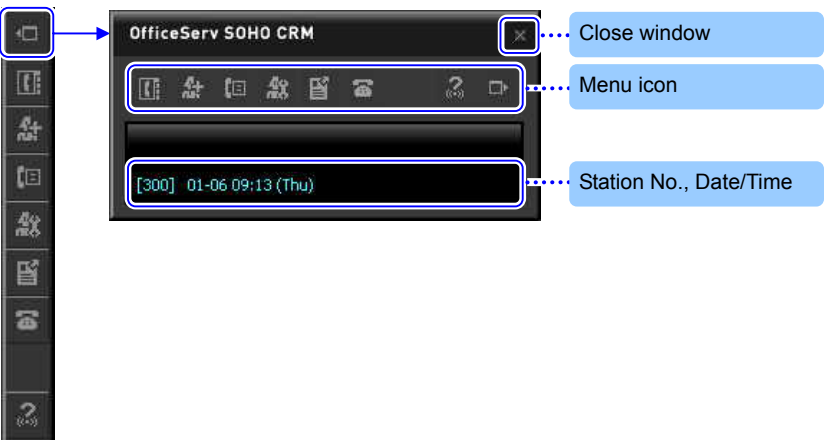
Popup Menu

The popup menu shown below appears when the right button of mouse is clicked on the Toolbar menu window:



Floating Window

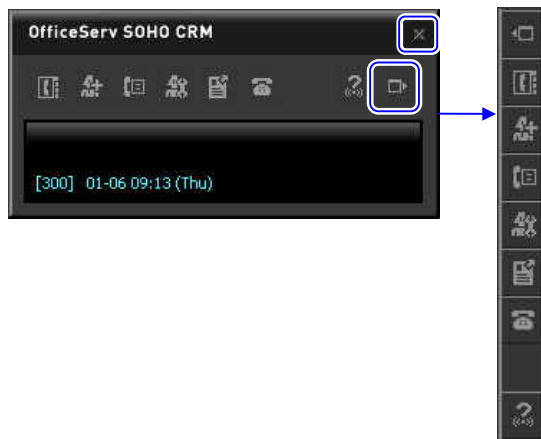
Click the [Change to floating window] menu icon(☐) of the <Toolbar menu> window to display the window shown below. This window is called the <Floating> window.



The floating window can be dragged freely within the Windows desktop.
The floating window displays the menus of the toolbar as icons, along with station information, and the current date/time.

Switching to Toolbar Menu Window

Click the [Change to toolbar menu] icon(☐) or the [×] button to switch from the floating window to the toolbar menu window.



Phonebook Menu

Users can use the phonebook menu to sort customer data by name/phone number/company name/recent registration.

Click the [Phonebook] icon(☎) of the toolbar menu window(or floating window) to display the <Phonebook> window shown below:



Retrieving Phonebook Data

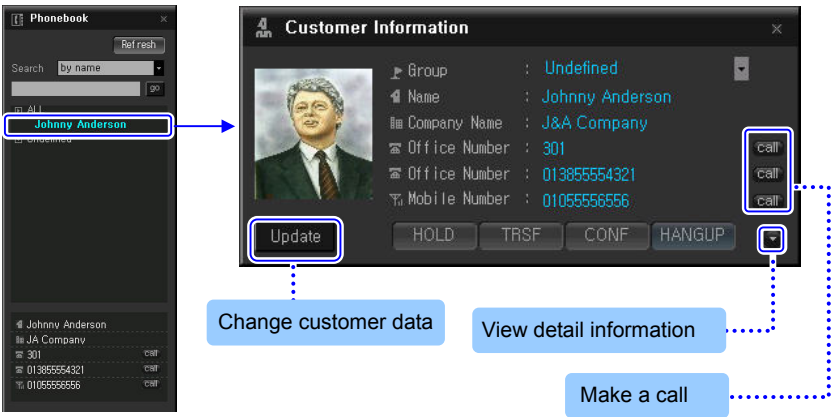
Click the [Refresh] button to search and display data saved in the phonebook. During the search, a window appears on the upper left corner of the Windows desktop and displays the progress of the search.

Setting Search Options

Select a search category from the search condition field(①) and enter the content to be searched into the search data entry field(②) to search a customer data that corresponds to the search condition. Or, click the [▼] button of the entire group or each group in the group list field(③) to search a customer data registered to the corresponding group. The entire customer data is searched when the search data entry field(②) is not entered

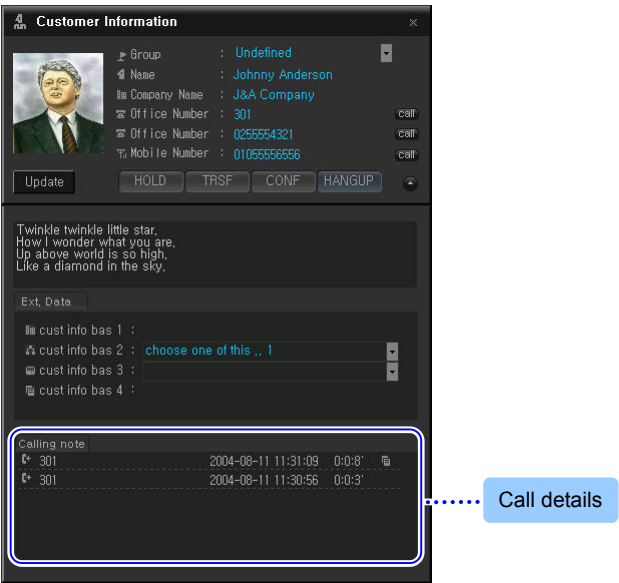
Search Result

If a name is selected from the group list field(③) or if a customer data that satisfies the search condition is found, the result field(④) appears. Double click the name in the group list field(③) to display the <Customer Information> window.

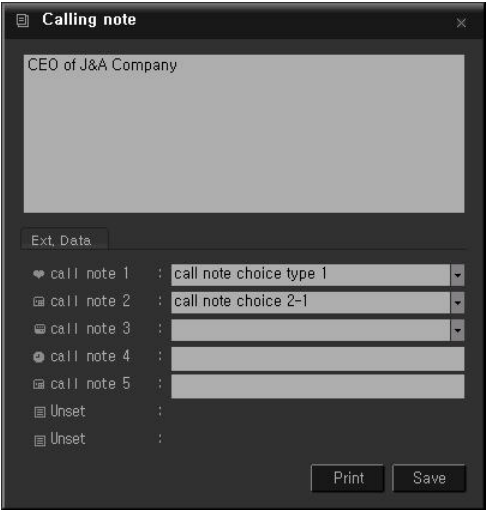


View Detail Information

Click the view detail information icon() in the <Customer Information> window to display detailed information on the customer as shown below:



Double click a call record of the call details field to verify or modify a memo saved during the call.



NOTE

Changing a Searched Number

For detailed procedure on changing a searched phone number, refer to the 'Search Phonebook' section of 'Chapter 4. Customer Data Management'.

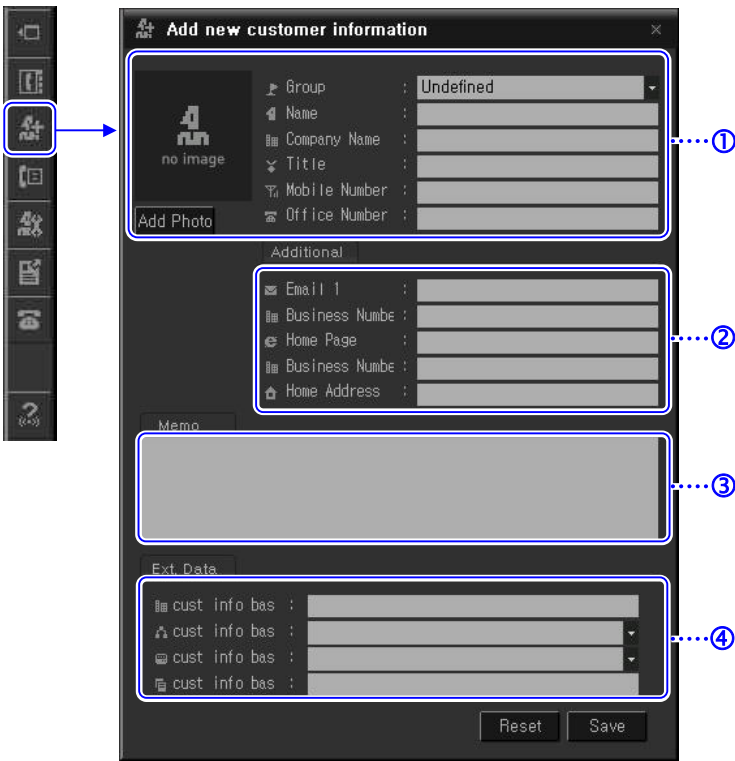
Changing Extension Data Entry Item of Call Record Window

The extension data entry item of the call record window can be changed at the [Calling note extension] tab of the [Template] menu.

Add New User Menu

Add New User menu allows users to register new customer data to the OfficeServ SOHO CRM phone book.

Click the [Add New User] icon() of the Toolbar menu window(or floating window) to display the <Add new customer information> window shown below:



The screenshot shows the 'Add new customer information' window. On the left is a vertical toolbar with several icons; the 'Add New User' icon (a person with a plus sign) is highlighted with a blue box and an arrow pointing to the main window. The main window has a title bar 'Add new customer information' and a close button. It contains several sections: a 'Basic Information' section with fields for Group (a dropdown menu showing 'Undefined'), Name, Company Name, Title, Mobile Number, and Office Number; an 'Additional' section with fields for Email 1, Business Number, Home Page, another Business Number, and Home Address; a 'Memo' section with a large text area; and an 'Ext. Data' section with four rows of 'cust info bas' fields. Each of these four sections is enclosed in a blue border and labeled with a circled number (1, 2, 3, and 4 respectively) connected by a dotted line. At the bottom right are 'Reset' and 'Save' buttons.

Select an address book group and enter Basic Information(①), Additional(②), Memo(③), and Ext. Data(④).



NOTE

Customer Data Registration Template

The template of [Add new customer information] menu can be selected at the [Template] menu.

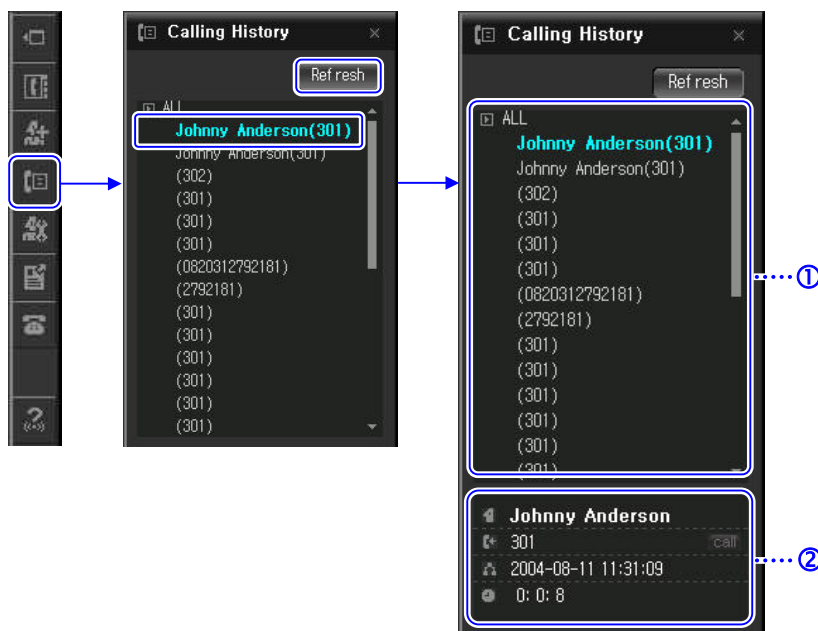
Registering Customer Data

For detailed procedure on registering customer data, refer to 'Customer Data Registration' of 'Chapter 4. Customer Data Management'.

Calling History Menu

Calling History menu allows users to retrieve the calling history during the recent week.

Click the [Calling History] icon() of the Toolbar menu window(or floating window) to display the <Calling History> window shown below:



Click the [Refresh] button to search and display the call history during the recent week. Click the [▼] button of the entire or a certain date(①) to retrieve the call history.

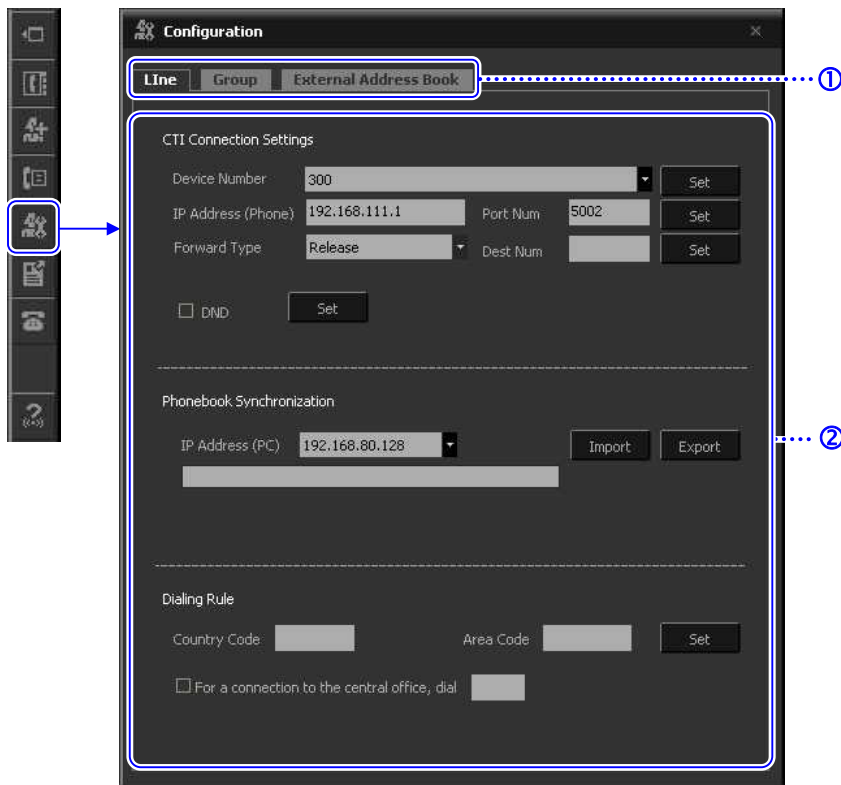
The result appears in the search result field(②) where the name and phone number of the other party, the call start time and call duration are displayed.

Click the [call] button in the search result field(②) to make a call to the number.

Configuration Menu

Configuration menu allows users to configure data required for using the OfficeServ SOHO CRM program.

Click the [Configuration] icon() of the Toolbar menu window(or floating window) to display the following <Configuration> window:



Configurable items are categorized as tabs of the <Configuration> window. Different data items(②) are displayed for each tab(①), which are described below:

- Line: Configure the line interfacing with OfficeServ SOHO and set registration data
- Group: Configure group for customer data registration. External Address Book: Address book data interwork between OfficeServ SOHO CRM and Microsoft Outlook/Excel

Line

The procedure for configuring the station data of a OfficeServ SOHO CRM user is as follows:

Select the [Line] tab(①) of the <Configuration> window.

 NOTE

Line Configuration
The 'Line Configuration' tab of the 'Configuration' menu can be configured only when the CTI function of OfficeServ SOHO CRM is running. To start CTI, right click on the <Toolbar menu> window and check the [Activate CTI(C)] item.



The following items can be configured from the [Line] tab window:

- CTI Connection Settings(②): Set the line data, call forward, and DND of the station that will be interworking with OfficeServ SOHO CRM.
- Phonebook Synchronization(③): Synchronize data between the OfficeServ SOHO and the OfficeServ SOHO CRM address book.
- Dialing Rule(④): Set calling data used when making a call through OfficeServ SOHO CRM.

CTI Connection Settings (②)

- 1.** Enter the IP address and port number of the OfficeServ SOHO into the IP address and Port Num fields and click [Set].
- 2.** Click the [▼] button of the Device Number field and select the station number of the mobile station or OfficeServ SOHO that will be interworking with the OfficeServ SOHO CRM program.
- 3.** To set call forwarding, select the Forward Type and enter the destination number, and click the [Set] button.
- 4.** To set DND, click the [Set] button of the DND item.

Phonebook Synchronization (③)

Click the [Import] or [Export] button of the Phonebook Synchronization field(③) to import phonebook data of OfficeServ SOHO to the OfficeServ SOHO CRM program or to export phonebook data of the CRM program to the OfficeServ SOHO.



NOTE

Synchronization of Address Book Data between the OfficeServ SOHO and OfficeServ SOHO CRM

For detailed procedure on synchronizing the address book data of OfficeServ SOHO and that of OfficeServ SOHO CRM, refer to 'OfficeServ SOHO Address Book Data Synchronization' of 'Chapter 4 Customer Data Management'.

Dialing Rule (④)

Configure the rule for dialing from the OfficeServ SOHO CRM address book and click the [Set] button.

- Country Code: Enter a default country code that will be used for making a call.
- Area Code: Enter a default area code that will be used for making a call.
- For a connection to the central office: Enter an external connection number that will be used for outgoing calls.



NOTE

If a Country Code is Identical to the Provider's ID

If a country code coincides with the identification code of a service provider, the number containing the country code cannot be dialed. In such cases, enter the country code into the phonebook once again to dial the phone number.

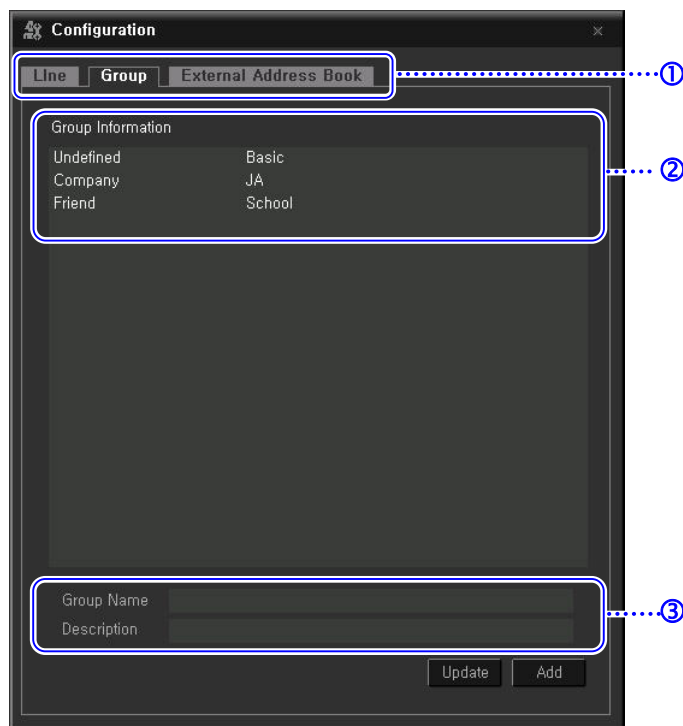
When the OfficeServ SOHO is Connected to C.O. Line

A C.O. line number need not be entered if the OfficeServ SOHO is connected to a C.O. line. A C.O. line number must be entered only when the OfficeServ SOHO is connected to an internal or private switch.

Group

The procedure for configuring a group for customer data registration is as follows:

Select the [Group] tab(①) of the [Configuration] window. Information on groups currently registered is displayed on the Group Information field(②).



Add Group

To add a new group, enter the name and description of the new group into the data entry field(③), and click the [Add] button.

Edit Group

To modify data of a registered group, select a group from the Group Information field(②) and modify the data at the data entry field(③), and click the [Update] button.

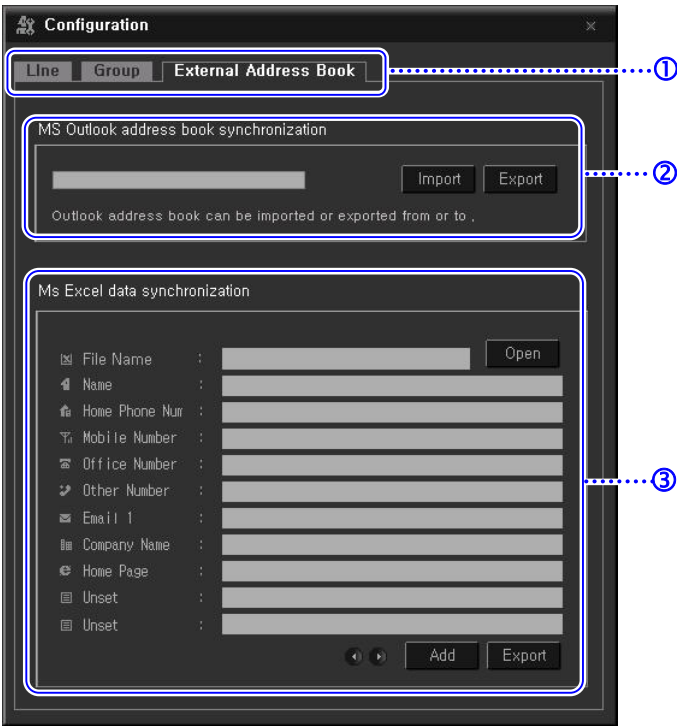
Delete Group

To delete a group, right click a group from the Group Information field(②) and select the [Delete] item.

External Address Book

The procedure for interworking data between OfficeServ SOHO CRM and an external address book is as follows:

Select the [External Address Book] tab(①) of the <Configuration> window.



MS Outlook address book synchronization (②)

Select the [Import] or [Export] button of the MS Outlook address book synchronization field(②) to interwork data between OfficeServ SOHO CRM and Microsoft Outlook.

MS Excel data Synchronization (③)

Click the [Open] and [Export] buttons of the MS Excel data Synchronization field(③) to interwork data between OfficeServ SOHO CRM and Microsoft Excel.



NOTE

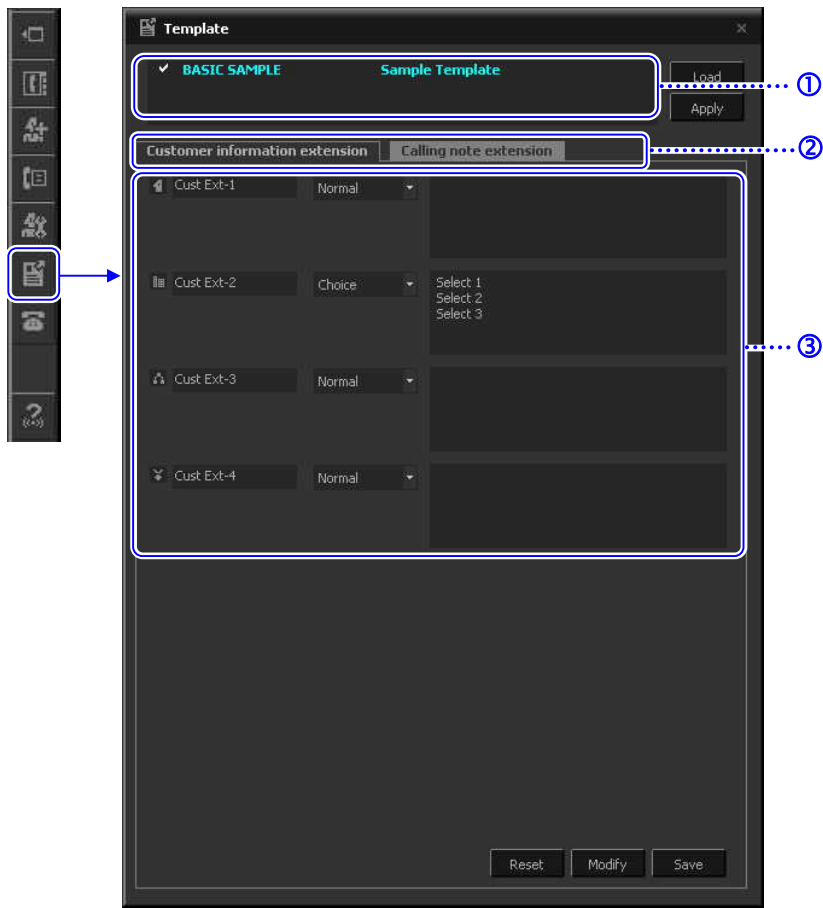
Address Book Data Synchronization Between OfficeServ SOHO CRM and Outlook/Excel

For procedure on synchronizing the address books of OfficeServ SOHO CRM and Micro soft Outlook/Excel, refer to 'External Address Book Management' of 'Chapter 4. Customer Data Management'.

Template Menu

Template menu allows users to select or edit a template, which will be used for registering customer data to the phone book.

Click the [Template] icon() of the Toolbar menu window(or floating window) to display the following <Template> window:



The template function allows users to configure the environment and window of OfficeServ SOHO CRM to accommodate the characteristics of his or her business category. Users can select a template from numerous templates basically provided, and can change an existing template or create a new one.

Template window provides the Customer information extension tab and the Calling note extension tab, which are used for configuring the following data:

- Customer information extension tab: Extension data used for registering customer data
- Calling note extension tab: Extension data used for recording calling data during a call



NOTE

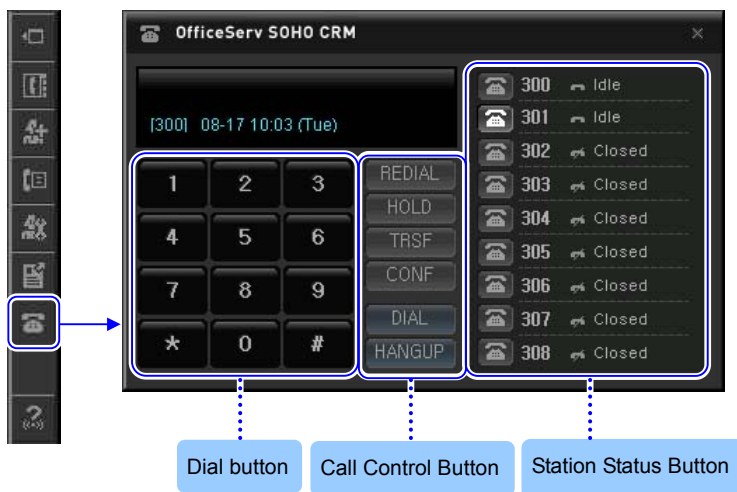
Select/Edit Template

For detailed procedure on selecting/editing/deleting a template, refer to 'Template Management' of 'Chapter 4. Customer Data Management'.

Dialpad Menu

Dialpad menu allows users to control calls of the OfficeServ SOHO by interworking the OfficeServ SOHO CRM with the OfficeServ SOHO.

Click the [Dialpad] icon(☎) of the Toolbar menu window(or floating window) to display the following <Dialpad> window:



The dial buttons, call control buttons, and station status buttons of the <Dialpad> menu window are used for controlling simple call function of the OfficeServ SOHO.



NOTE

Dialpad Menu

The [Dialpad] menu window of OfficeServ SOHO CRM only supports call control through interworking with the OfficeServ SOHO. However, this function is not supported for mobile stations.

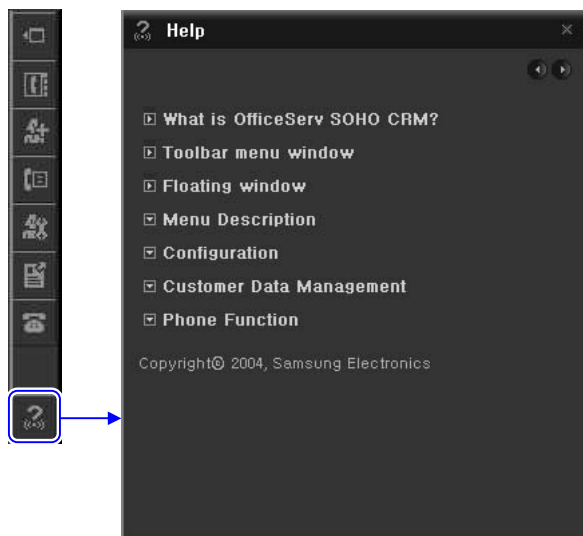
The call control buttons are described below:

Button	Description
REDIAL	Redials the most recent number dialed.
HOLD	Holds current call.
TESF	Transfers the current call to another station.
CONF	Starts a conference call.
DIAL	Makes a call or receives an incoming call.
HANGUP	Disconnects a connected call.

Help Menu

The Help menu allows users to easily search brief descriptions on how to use the functions of OfficeServ SOHO CRM.

Click the [Help] icon(?) of the Toolbar menu window(or floating window) to display the following <Help> window:





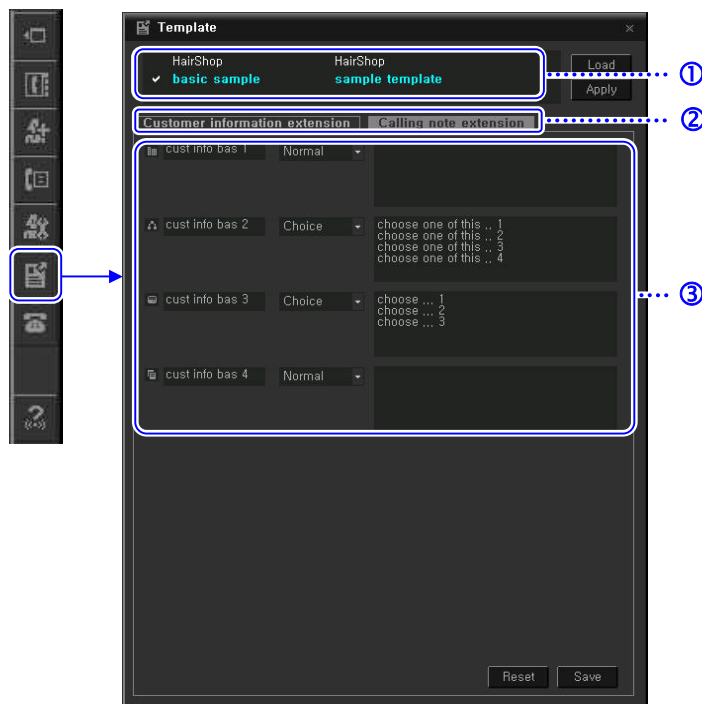
CHAPTER 4. Customer Information Management

This chapter describes method of registering customer information by using the template provided by the OfficeServ SOHO CRM program or of searching the registered address book.

Template Management

Follow the steps below to create or select and modify a template:

1. Click the [Template] menu icon() from the toolbar(or floating) window.



2. Select a template to be used from the template items(①).
Otherwise, click the [Load] button to select the default template.
3. Select the Customer information extension(②) to set a template where customer information will be registered.
4. Set each template item(③) to register customer information.
5. Click the [Save] button to save the modified template.



The image shows a 'Save template' dialog box with a close button (X) in the top right corner. It has three input fields: 'Template name' with a dropdown menu showing 'HairShop', 'Description' with an empty text box, and 'Country' with a text box containing '1042'. At the bottom, there are 'OK' and 'Cancel' buttons.

6. Enter a value in Template name, Description, Country, and then click the [OK] button.
7. Click the [Apply] button to apply the template settings.
8. Click the [Reset] button to delete the settings.



CHECK

Applying Template Settings

Template details are not applied until the template is applied by clicking the [Apply] button in the Customer information extension and Calling note extension tabs. Click the [Apply] button after modifying template settings.

Deleting Template

Select and right-click a template to be deleted from the template items(①), and then select [Delete Item].

9. Select Calling note extension(②) to set a template that allows the user to enter a log of calls with customers.

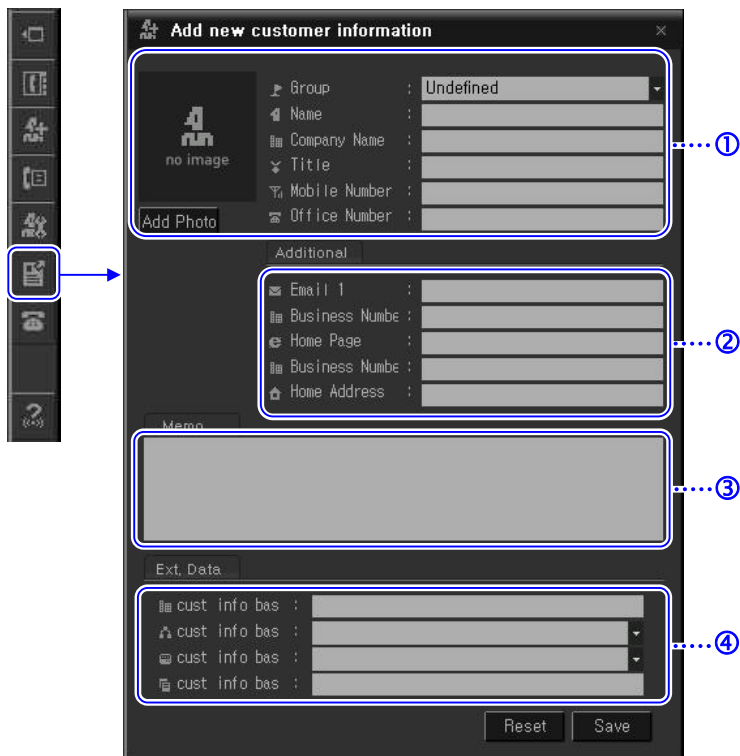


10. Set each option(③) of the template to enter a calling log.
11. Click the [Save] button to save the modified template.
12. Click the [Apply] button to apply the template settings.
13. Click the [Reset] button to delete the settings.

Entering Customer Information

Follow the steps below to enter customer information by using a template:

1. Click the [Add New User] menu icon() from the toolbar(or floating) window. Then, the <Add new customer information> menu window below will appear:



2. Enter basic information on the customer to be registered in the basic information(①), Additional(②), Memo(③), and Ext. Data(④) subwindows.
3. Click the [Add Photo] button from the basic information subwindow(①) to register customer photos.

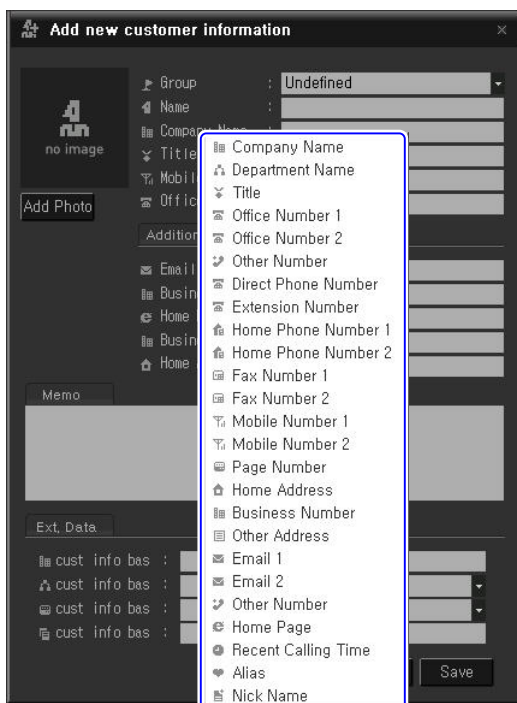


NOTE

Registering Photos

Photos should be saved in the PC in the format of an image file beforehand.

4. Select and right-click an option from the basic information(①) and Additional(②) subwindows to change the option to another one.



NOTE

Changing a Field in the Basic Information(①) and Additional(②) Subwindows

Duplicate options can be selected in the nine fields other than 'Group' and 'Name' from the fields of the basic information(①) and Additional(②). The 'Name' field of the basic information subwindow(①) cannot be changed.

Changing a Field in the Ext. Data(④) Subwindow

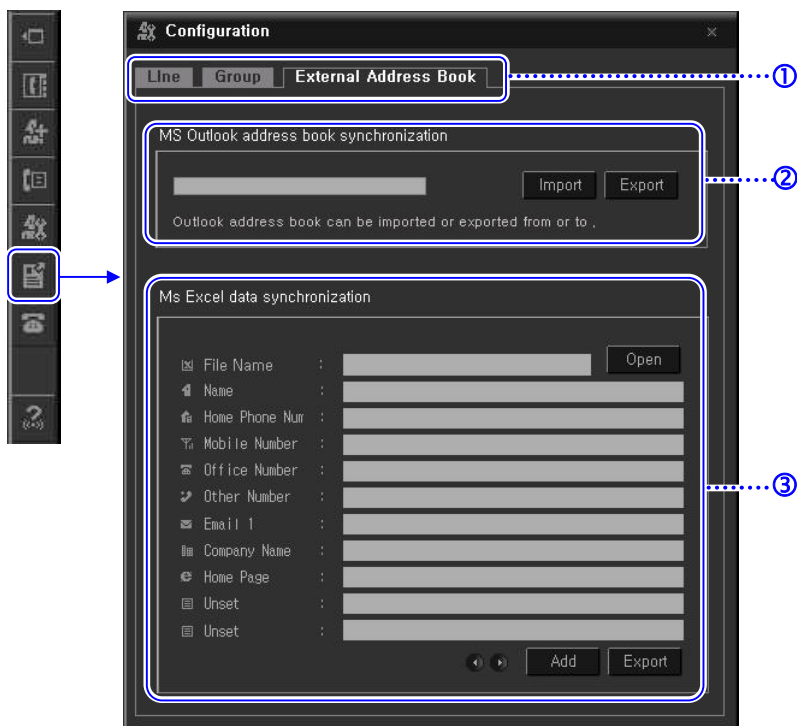
The fields of the Ext. Data(④) subwindow can be changed in the 'Customer information extension' tab of the 'Template' menu.

5. Enter customer information. Then, click the [Save] button to register the customer information.

External Address Book Registration

Follow the steps below to interwork address book data of OfficeServ SOHO CRM with that of Outlook/Excel data:

Click the [Configuration] menu icon() from the Toolbar(or floating) window, and select the [External Address Book] tab(①).

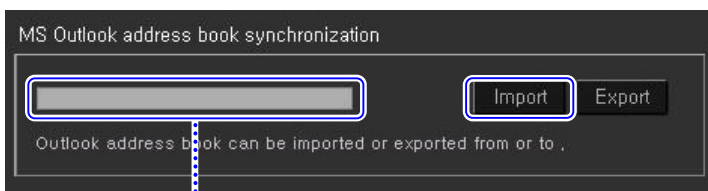


MS Outlook Address Book Synchronization

Importing Address Book

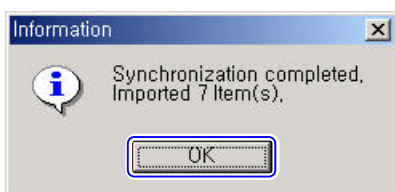
Follow the steps below to import address book data in Microsoft Outlook to OfficeServ SOHO CRM:

1. Click the [Import] button from MS Outlook address book synchronization(②) in the External Address Book tab. A window that displays the import progress at top left of Windows desktop appears as shown below while Microsoft Outlook Address Book data is being imported:



Address Book Import Progress

2. Once the address book import complete message appears, click the [OK] button.



NOTE

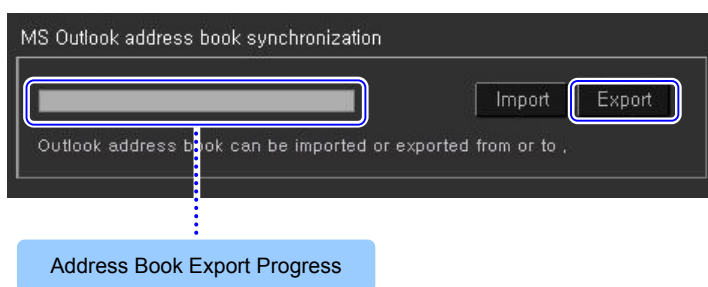
Message Displayed When Microsoft Outlook Address Book is Imported

Once a message, 'A program is trying to access a e-mail address you have stored in Outlook. Do you want to allow this? If this is unexpected, it may be a virus and you should choose "No".' appears, select the access allowed time checkbox to set the allowed time. Then, click the [Yes] button.

Exporting Address Book

Follow the steps below to export the address book data of OfficeServ SOHO CRM to the Microsoft Outlook address book data:

1. Click the [Export] button from MS Outlook address book synchronization(②) in the External Address Book tab. A window that displays the export progress at top left of Windows desktop appears as shown below while the address book data is being exported to Microsoft Outlook:



2. Once the address book export complete message appears, click the [OK] button.



MS Excel Data Synchronization

Opening Address Book Data in the Format of Microsoft Excel

Follow the steps below to import address book data in Microsoft Excel to OfficeServ SOHO CRM:

1. Click the [Open] button from MS Excel data Synchronization(③) in the External Address Book tab.

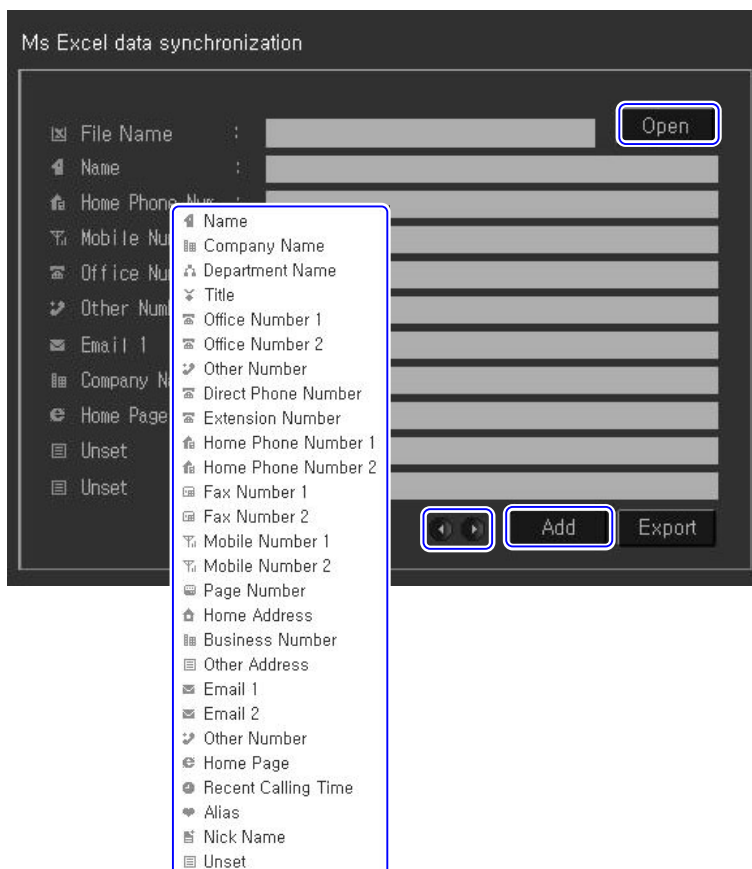
Ms Excel data synchronization

File Name	:		Open
Name	:		
Home Phone Num	:		
Mobile Number	:		
Office Number	:		
Other Number	:		
Email 1	:		
Company Name	:		
Home Page	:		
Unset	:		
Unset	:		

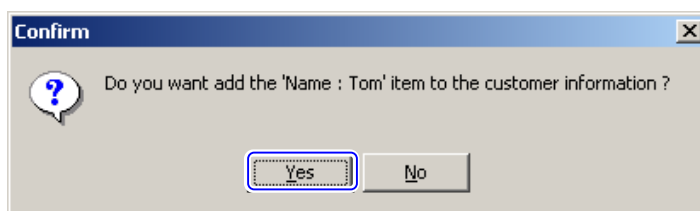
◀ ▶ Add Export

2. Select an address book data file in Microsoft Excel, and then click the [Open] button.
3. Modify the contents of the address book data file to modify the address book data.

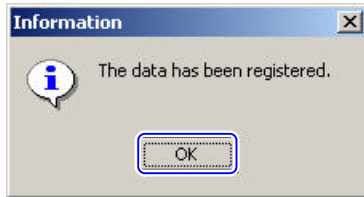
4. Select and right-click a field to change the field to another one.



5. Click the [Add] button to save the imported or modified address book data in the address book data of OfficeServ SOHO CRM.
6. Once the customer information adding confirmation message appears, click the [Yes] button.



7. Once the information registration complete message appears, click the [OK] button.

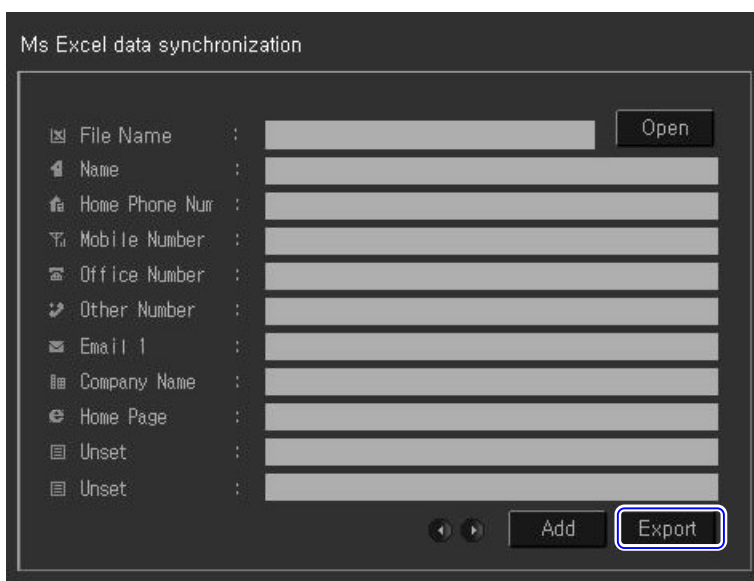


8. Click the [◀▶] button from Ms Excel data synchronization(③) select the next customer information.
9. Modify the customer information as described in Step 4. Click the [Add] button to register the customer information.

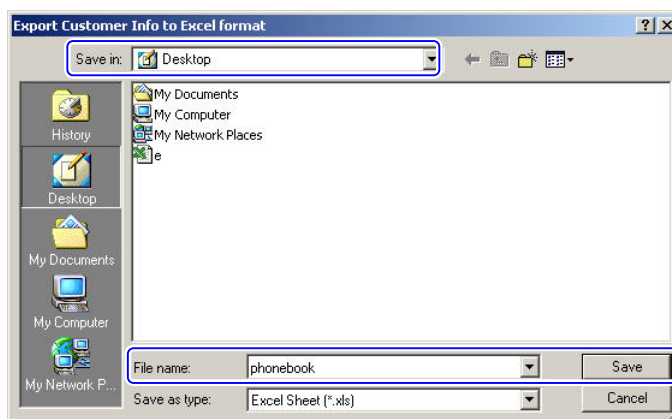
Exporting Address Book of OfficeServ SOHO CRM in the Format of Microsoft Excel

Follow the steps below to export the address book data of OfficeServ SOHO CRM in the format of Microsoft Excel:

1. Click the [Export] button from Ms Excel data synchronization(③) in the External Address Book tab.



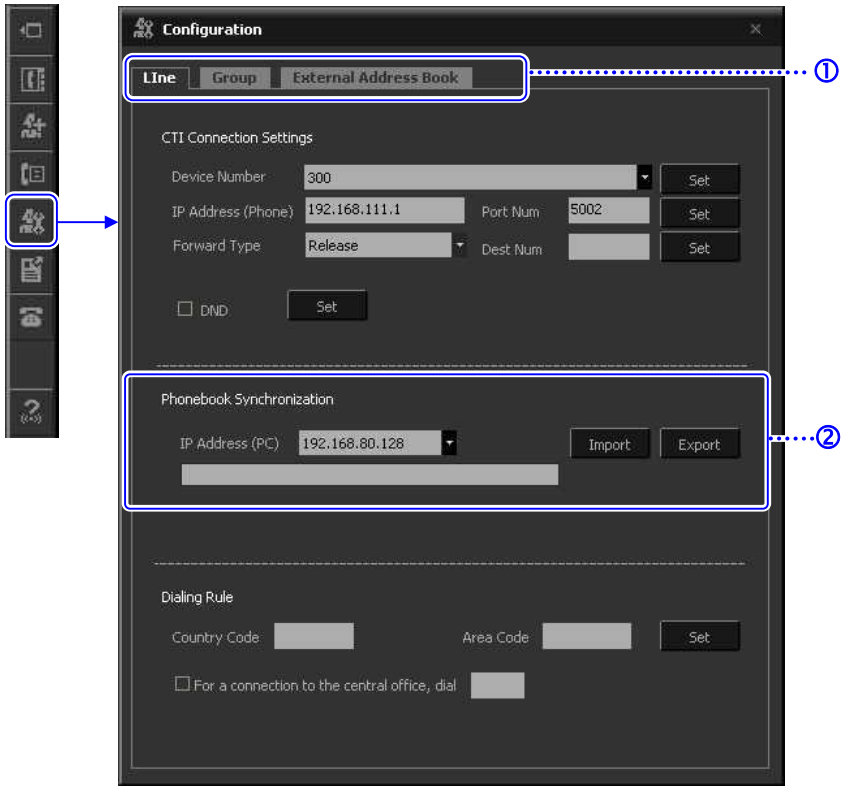
2. Select a location where an Excel address book file will be saved and enter the file name. Then, click the [Save] button.



Synchronization of OfficeServ SOHO Address Book Data

Follow the steps below to synchronize the OfficeServ SOHO with the address book data of OfficeServ SOHO CRM:

Click the [Configuration] menu icon(④) from the toolbar(or floating) window, and then select the [Line] tab(①).





NOTE

Synchronizing OfficeServ SOHO CRM with OfficeServ SOHO Address Book Data

CTI operation status should be set in OfficeServ SOHO CRM to synchronize OfficeServ SOHO CRM with the address book data of OfficeServ SOHO. Right-click the toolbar and select [Activate CTI(C)] to set CTI operation status.

Importing Address Book

Follow the steps below to import the address book data of the OfficeServ SOHO to OfficeServ SOHO CRM:



CHECK

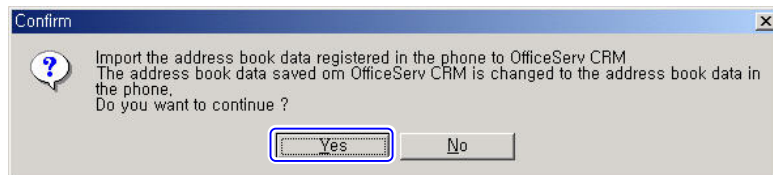
Importing the Address Book Data of the OfficeServ SOHO

Once the address book data of the OfficeServ SOHO is imported, the data saved in the address book of OfficeServ SOHO CRM is deleted, and the address book data of the OfficeServ SOHO is saved in the address book of OfficeServ SOHO CRM. Execute after ensure that important data is not delete.

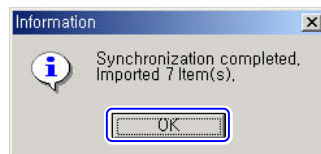
1. Click the [Import] button from Phonebook Synchronization(②) in the [Line] tab.



2. Once the address book data import confirmation message appears in the OfficeServ SOHO, click the [Yes] button.



3. Once the address book data import complete message appears, click the [OK] button.



Exporting Address Book

Follow the steps below to export the address book of OfficeServ SOHO CRM to the OfficeServ SOHO:

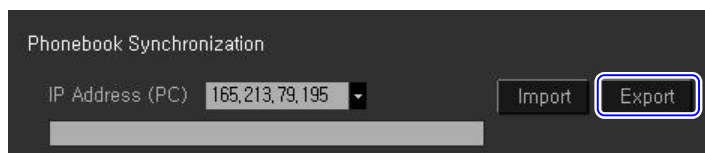


CHECK

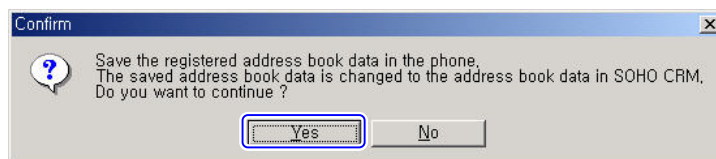
Exporting the Address Book Data of OfficeServ SOHO CRM

Once the address book data of OfficeServ SOHO CRM is exported, the data saved in the address book of the OfficeServ SOHO is deleted, and the address book data of the OfficeServ SOHO is saved in the address book of the OfficeServ SOHO CRM. Be careful that important data is not deleted.

1. Click the [Export] button from Phonebook Synchronization(②) in the [Line] tab.



2. Once the address book data export confirmation message appears in the OfficeServ SOHO CRM, click the [Yes] button.



3. Once the address book data export complete message appears, click the [OK] button.



Searching Phonebook

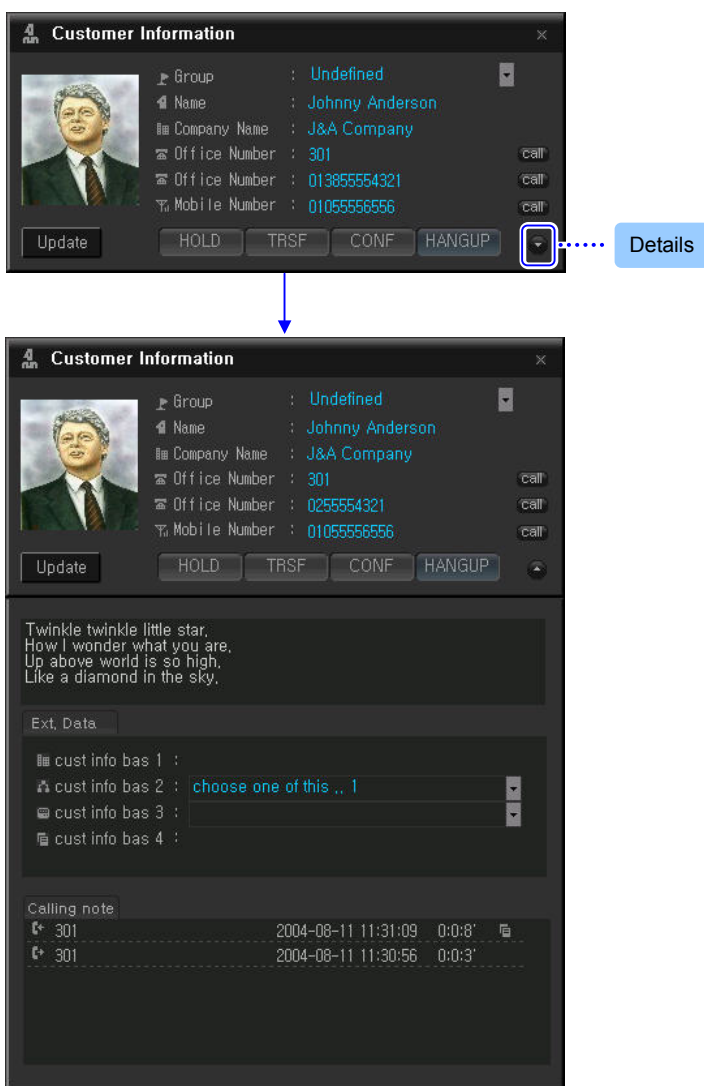
Follow the steps below to search the phonebook of the customer information registered with OfficeServ SOHO CRM:

1. Click the [Phonebook] menu icon() from the toolbar(or floating) window. Then, the <Phonebook> menu window will appear as shown in the figure below:



2. Click the [Refresh] button to search and display the data registered with the phonebook. A window that displays the data search progress at top left of Windows desktop while the data registered with the phonebook is being searched.
3. Select a search criterion from Search(①).
4. Enter a phone number or name to be searched in the search field(②).

5. Click the [go] button from the search field(②). Then, the basic information on a customer who meets the criteria will be displayed in the search results(④).
6. Double click the searched name/phone number displayed in the results(③). Then, the <Customer Information> window will appear as shown in the figure below:



7. Modify the contents of the registered customer information.
8. Right-click the photo and click [Change Picture] to change the photo.
9. Modify the customer information, and then click the [Update] button.



NOTE

Deleting Photos

Right-click the registered photo and select [Delete Picture] to delete the photo.

Deleting Customer Information

Select and right-click the searched customer information from the search results(③) and select [Delete Item] to delete the customer information.



CHAPTER 5. Call Control

This chapter describes method of making various calls by using the OfficeServ SOHO CRM program.

Call Control

The OfficeServ SOHO is controlled by using the [Dialpad] menu of OfficeServ SOHO CRM as described below:

Category	Station	C.O.Line
Making Calls	- Making intercom calls - Making calls by using the station buttons	Making external calls
	Making a call to the recently called number	
Answering Calls	Answering intercom calls	- Answering external calls - Forwarding calls
	Call pickup	
Functions Available While Calling	Holding intercom calls	Holding external calls
	Conference call	



NOTE

Controlling Calls by Using OfficeServ SOHO CRM

Only the call control functions for the OfficeServ SOHO are enabled by using the call control menu of OfficeServ SOHO CRM when CTI operates. To make a call, OfficeServ SOHO should be used. For detailed method of making a call by using the OfficeServ SOHO, refer to 'OfficeServ SOHO User Guide'. The call control function in a wireless terminal is not enabled.

Making Calls

Making Intercom Calls

Follow the steps below to make intercom calls by using OfficeServ SOHO CRM:

Making Intercom Calls by Using the Dial Button

1. Enter the target station number by using the dial button in the <Dialpad> menu window in a wait state, and then click the **DIAL** button.



2. Once the target answers the call, speak to the target by using the speaker phone of the OfficeServ SOHO or by lifting the receiver.
3. Click the **HANGUP** button to hang up the phone.



NOTE

Deleting Entered Phone Number

Press [←] to delete a letter of the entered phone number at a time. Once a phone number is deleted or a call ends, press [Esc].

When Having a Conversation By Lifting the Receiver

Replace the handset if you spoke through the handset of the OfficeServ SOHO.

Making Calls by Using the Station Buttons

1. Click the target station number button in the <Dialpad> menu window in a wait state.



2. Once the target answers a call, speak to the target by using the speaker phone of the OfficeServ SOHO or by lifting the receiver.
3. Click the **HANGUP** button to hang up the phone.

Making External Calls

Follow the steps below to make external calls by using OfficeServ SOHO CRM:

1. Enter the target number by using the dial button in the <Dialpad> menu window in a wait state, and then click the **DIAL** button.



2. Once the target answers a call, speak to the target by using the speaker phone of the OfficeServ SOHO or by lifting the receiver.
3. Click the **HANGUP** button to hang up the phone.

Making a Call to the Recently Called Number

Follow the steps below to make a call to the recently called station or C.O. line number by using OfficeServ SOHO CRM:

1. Click the **REDIAL** button from the <Dialpad> menu window in a wait state.
2. Make a call to the recently called number.
3. Once the target answers a call, speak to the target by using the speaker phone of OfficeServ SOHO or by lifting the receiver.
4. Click the **HANGUP** button to hang up the phone.

Answering Calls

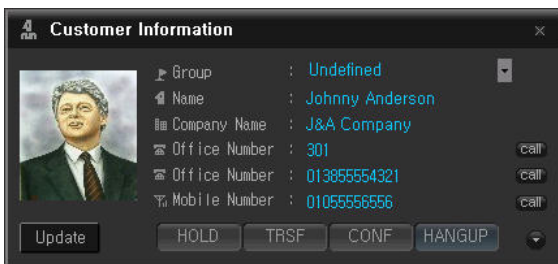
Answering Intercom Calls

Follow the steps below to answer intercom calls connected to the OfficeServ SOHO by using OfficeServ SOHO CRM:

1. Once a call is connected, OfficeServ SOHO rings, and the <Calling notification> window below appears on Windows desktop:



2. Upon clicking the <Calling notification> window, the <Customer Information> window below appears, and the user can have a conversation to the called party:



NOTE

Answering a Call by Using OfficeServ SOHO CRM

Upon answering a call by using OfficeServ SOHO CRM, the user can answer the call by using the speaker phone or by lifting the receiver. After the conversation, leave the receiver off the hook.

3. After the conversation, click the **HANGUP** button from the customer information details window, and then leave the receiver off the hook.

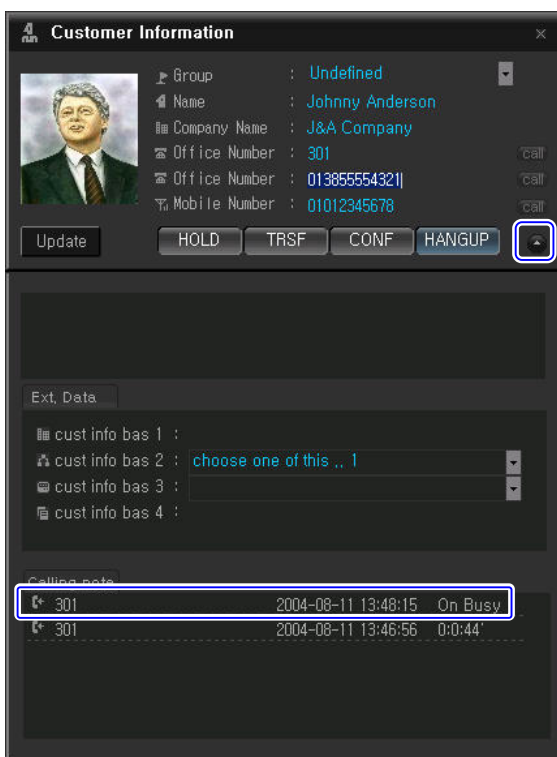
Answering External Calls

Follow the steps below to answer external calls connected to the OfficeServ SOHO by using OfficeServ SOHO CRM:

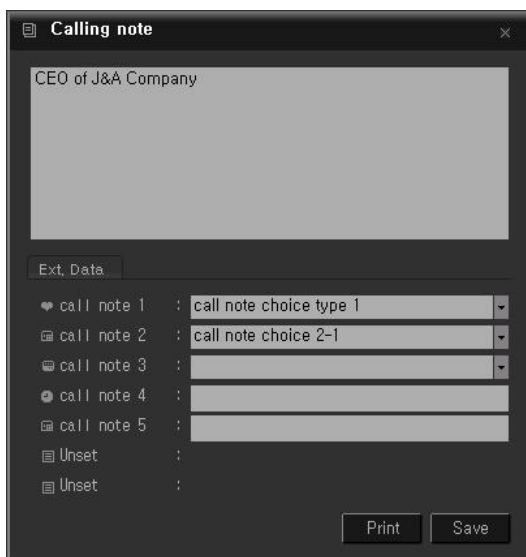
1. Once a call is connected, OfficeServ SOHO rings, and the <Calling notification> window below appears on Windows desktop:



2. Upon clicking the <Calling notification> window, the <Customer Information> window below appears, and the user can have a conversation to the called party:



3. Click the affected calling log in Calling note to enter calling details and calling note extension data.



4. Enter calling note. Then, click the [Save] button to save the note.



NOTE

Checking or Modifying Calling Note
Select a calling note from the calling note list of the <Customer Information> window to check or modify the calling note texts created while calling.

Call Pickup

Follow the steps below to pick up a call when the call is connected to another phone:

1. Once a phone in the next seat rings, it is displayed in the station button.



2. Click the corresponding phone number button to pick up the call.

Functions Available While Calling

Hold

Follow the steps below to have the other party wait for some time and then resume a conversation when an emergency occurs or another call is connected while calling:

1. Click the **HOLD** button from the <Dialpad> menu window to have a call on hold while calling.
2. The other party is on hold and hears a hold tone.
3. Click the **RETR** button to resume the conversation.

Transfer

Follow the steps below to transfer an external call when the other party requests the user to connect the call to the third party while calling:

1. Click the  button from the <Dialpad> menu window.
2. Enter a station or C.O.line number to which the call will be transferred.

Conference Call

Follow the steps below to join up to three people(in a station or C.O.line) including the user and have a simultaneous conversation with one another:

1. Click the  button from the <Dialpad> menu window to make a conference call while calling.
2. Enter the target numbers, and then click the  button.
3. Once the other party answers the call, click the  button to make a conference call.



This page is intentionally left blank.



ANNEX A. Abbreviation

C

CID	Caller Identification
CPU	Central Processing Unit
CRM	Customer Relationship Management
CTI	Computer Telephony Integration

H

HDD	Hard Disk Drive
-----	-----------------

I

IP	Internet Protocol
----	-------------------

P

PSTN	Public Switched Telephone Network
------	-----------------------------------

S

SMS	Short Message Service
-----	-----------------------

T

TCP/IP	Transmission Control Protocol/Internet Protocol
--------	---

U

USB	Universal Serial Bus
-----	----------------------

V

VDC	Voice Data Convergence
-----	------------------------

W

WAN	Wide Area Network
-----	-------------------

WIP	Wireless IP-Phone
-----	-------------------

OfficeServ SOHO CRM User Guide

©2005 Samsung Electronics Co., Ltd.
All rights reserved.

Information in this document is proprietary to SAMSUNG
Electronics Co., Ltd.

No information contained here may be copied, translated,
transcribed or duplicated by any form without the prior
written consent of SAMSUNG.

