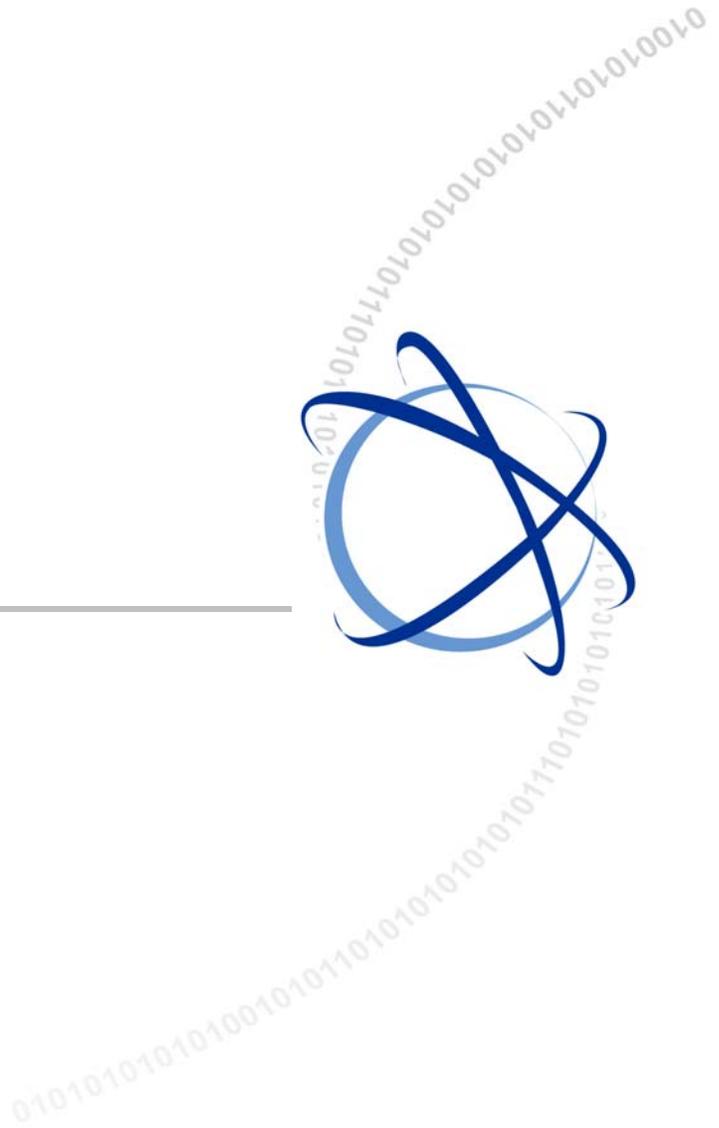


OS SOHO CRM User Guide



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This manual should be read before the installation and operation, and the operator should correctly install and operate the product by using this manual.

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.

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INTRODUCTION

Purpose

OS Small Office Home Office(SOHO) Customer Relationship Management(CRM) is a Voice Data Convergence(VDC) solution for PC, which interworks with the OS SOHO or mobile stations registered to the OS SOHO.

This document describes procedures on registering/managing customers and on controlling calls through the OS SOHO CRM.

Document Content and Organization

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

CHAPTER 1. Introduction

This chapter describes the overall features of OS SOHO CRM program.

CHAPTER 2. Program Installation

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

CHAPTER 3. Menu Description

This chapter describes the menus of OS SOHO CRM.

CHAPTER 4. Customer Information Management

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

CHAPTER 5. Call Control

This chapter describes method of controlling the call functions of the OS SOHO through the OS 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.



CHECK

CHECKPOINT

Provides the operator with checkpoints for stable system operation.



NOTE

NOTE

Indicates additional information as a reference.

Reference

OS SOHO User Guide

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

OS SOHO Web Management System User Guide

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

Revision History

EDITION	Date of Issue	Remarks
00	2004. 07.	Original
01	2005. 05.	Revision
02	2005.07	Revision



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TABLE OF CONTENTS

INTRODUCTION	I
Purpose	I
Document Content and Organization	I
Conventions.....	II
Reference	III
Revision History.....	III
CHAPTER 1. Introduction	1
OS SOHO CRM Overview.....	1
OS 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
Dial Pad Menu.....	10
Phonebook Menu	12
Call/SMS Log Menu	19
Short Message Service (SMS) Menu.....	27
Configure Menu	30
CTI Setting.....	32
Phone Setting	34
Call Statistics	36
Data Exchange	39

TABLE OF CONTENTS

Field Setting	41
Group Setting.....	45
Additional Setting.....	46
Help Menu	48
<hr/>	
CHAPTER 4. Customer Information Management	49
<hr/>	
Customer Information Entry	49
Phonebook Management	51
Synchronization of OS SOHO Phonebook Data	51
Synchronization of Microsoft Outlook Phonebook Data	58
Synchronization of Microsoft Excel Phonebook Data.....	62
Searching Phonebook.....	67
<hr/>	
CHAPTER 5. Call Control	75
<hr/>	
Call Control	75
Making Calls.....	76
Making Intercom Calls	76
Making External Calls	78
Answering Calls.....	79
Answering Intercom Calls	79
Answering External Calls	80
Call Pickup.....	82
Functions Available While Calling.....	83
Recall.....	83
Conference Call	83
<hr/>	
CHAPTER 6. Outlook Add-On	84
<hr/>	
Outlook Add-On Toolbar	84
Make a call.....	85
Short Message Service.....	87
<hr/>	
ANNEX A. ABBREVIATION	89
<hr/>	
C ~ U	89
V ~ W.....	90



CHAPTER 1. Introduction

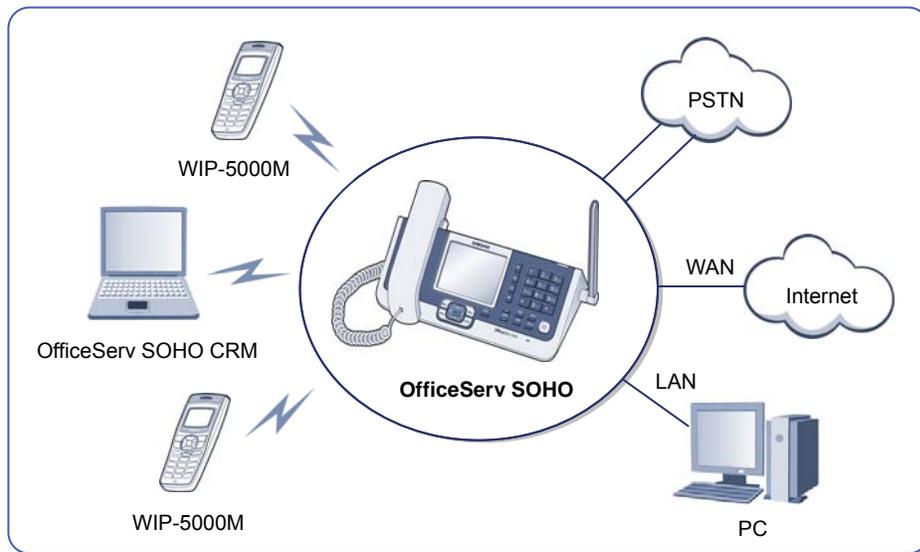
This chapter describes the overall features of OS SOHO CRM.

OS SOHO CRM Overview

OS SOHO CRM is a VDC solution running on PC, which interworks with the OS SOHO or with a mobile station registered to the OS SOHO. Users of OS SOHO can perform customer information management and call control through the OS SOHO CRM program.

In addition, Microsoft Outlook/Excel format data can be used as phonebook data.

OS SOHO CRM interworks with the network is as shown below.



OS SOHO CRM Function

OS SOHO CRM provides the following functions:

CID Based Customer information Management

- Customer information management based on Caller Identification(CID)

Customer Address Book Management

- Synchronization with OS SOHO address book/phonebook
- Provides detailed customer information

Call Control

- Various call control functions on a PC through CTI(computer and Telephony Integration)

External Data Interwork

- Data interwork with Microsoft Outlook/Excel
- Convenient customer information entry through interworking with OS SOHO phone book

SMS (Short Message Service)

- Users can send/receive text messages by using OS SOHO CRM

Outlook Add-On

- Users can control call and send SMS on the Outlook.



CHECK

Data Interwork Between OS SOHO and OS SOHO CRM Program

The network configuration must be configured accordingly to support the data interwork between the OS SOHO and the OS SOHO CRM program. Refer to the 'CTI Setting' description of '[Configure] 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 OS SOHO CRM program.

Preparations for Installation

Check the following items before installing the OS SOHO CRM program.

System Requirements

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

Items to Check

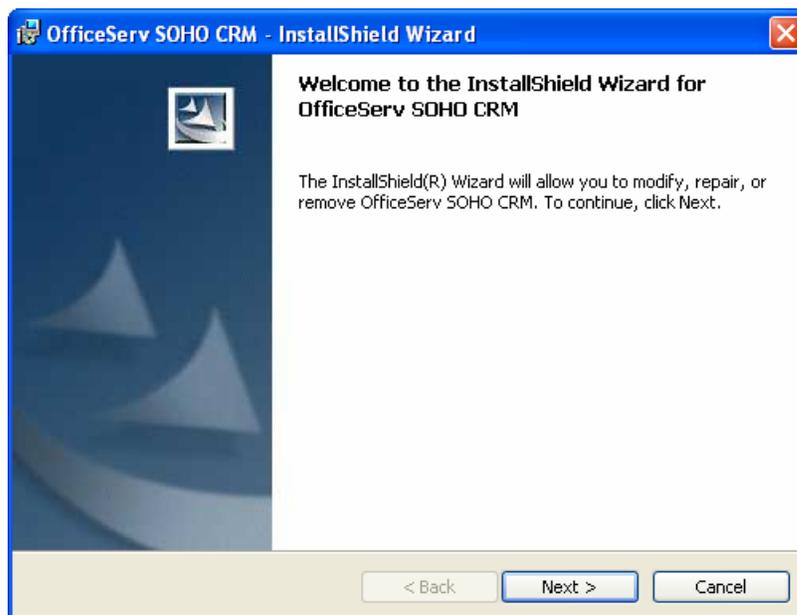
Verify the following items before installing the OS SOHO CRM program:

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

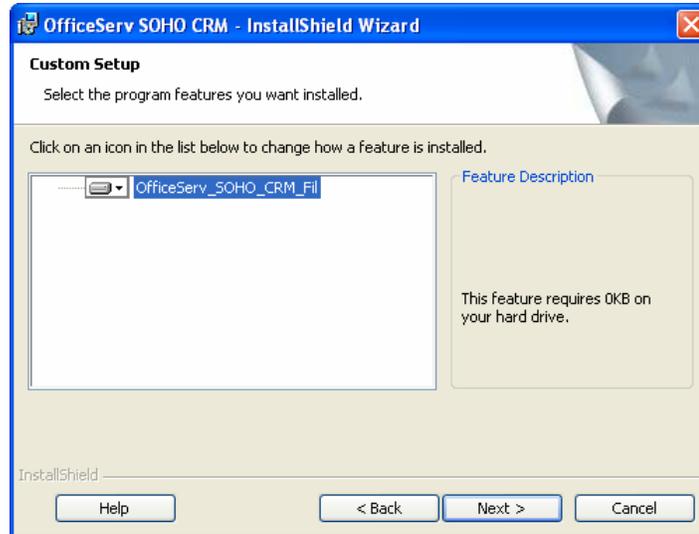
Program Installation Procedure

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

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

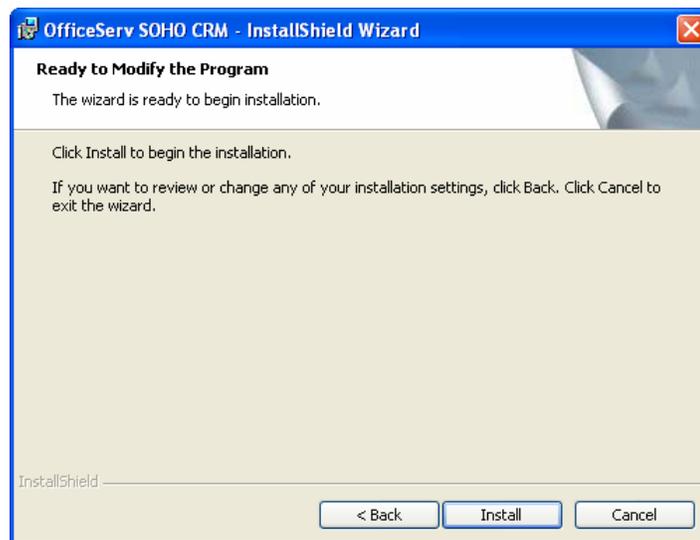


3. Confirm the installation folder from the <Destination Folder> window and click the [Next>] button.



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

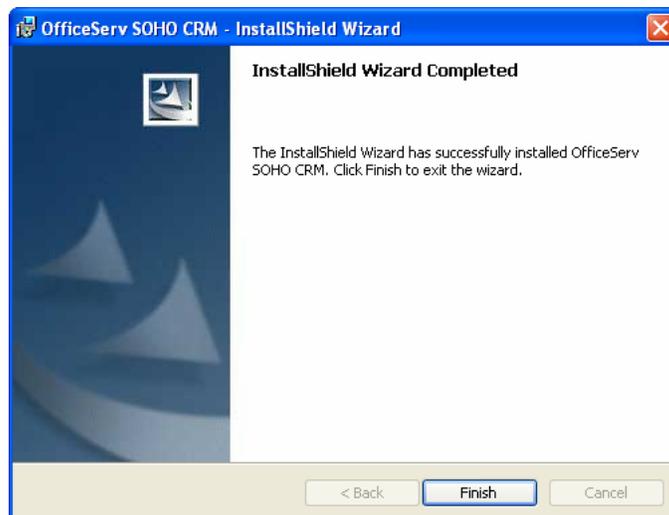
4. Click the [Install] button of the <Ready to Install the Program> window.



5. The <Installing OS 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 OS SOHO CRM Program After Installation

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

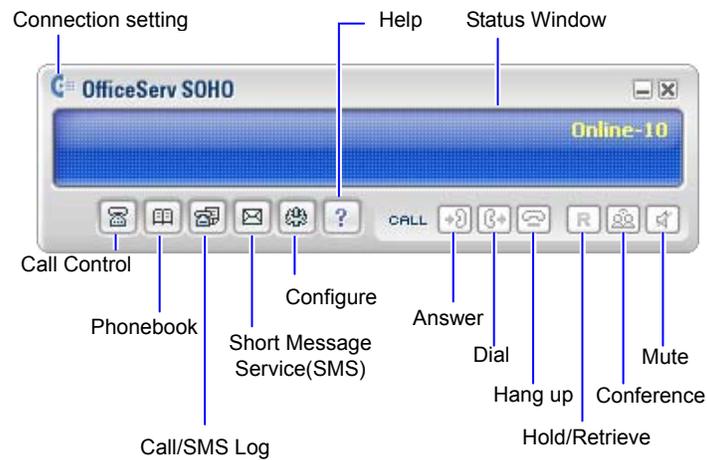


CHAPTER 3. Menu Description

This chapter describes the menus of OS SOHO CRM program.

Toolbar Menu Window

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



Connecting to the OS SOHO from the Toolbar Window

Click the OS SOHO CRM (C) icon, and then the pop up menu will appear as shown below.

Selecting the pop up menu enables to connect or disconnect to the OS SOHO.



You can set the station data of a OS SOHO CRM user in the <Configure> menu window.

	NOTE	Setting the station data
For detailed procedure on setting the station data, refer to '[Configure] menu'.		

Making calls from the Toolbar Window

You can make a call, using the call control button in the <Toolbar> menu window.



Enter the target station number by using the keyboard , and then click the [] button.



If the target answers the call, speak to the target through the speakphone in the OS SOHO or the receiver.



NOTE

Deleting Entered Phone Number

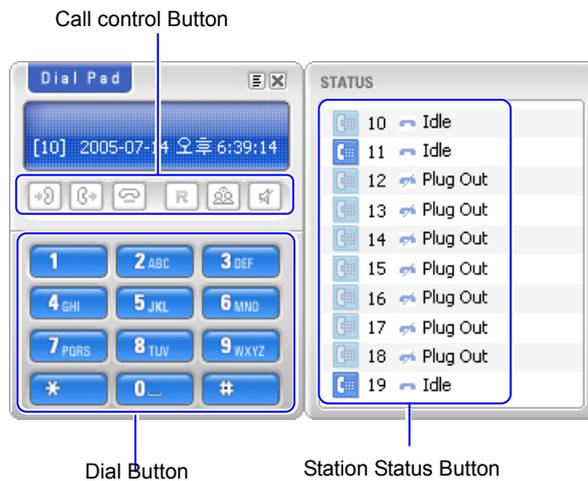
Press [←] to delete a letter of the entered phone number at a time. Press [Esc] to delete the whole number at a time or to delete after a call is end.

Call Control

For detailed information about the call control, such as making calls, answering calls, etc., refer to /Chapter 5. Call Control menu'.

Dial Pad Menu

Click the [Dial Pad] icon(☎) to display the following the <Dial Pad> menu window.



The dial buttons, call control buttons, and Extension Phone status buttons on the <Dial Pad> menu window are used for controlling simple call function of the OS SOHO.

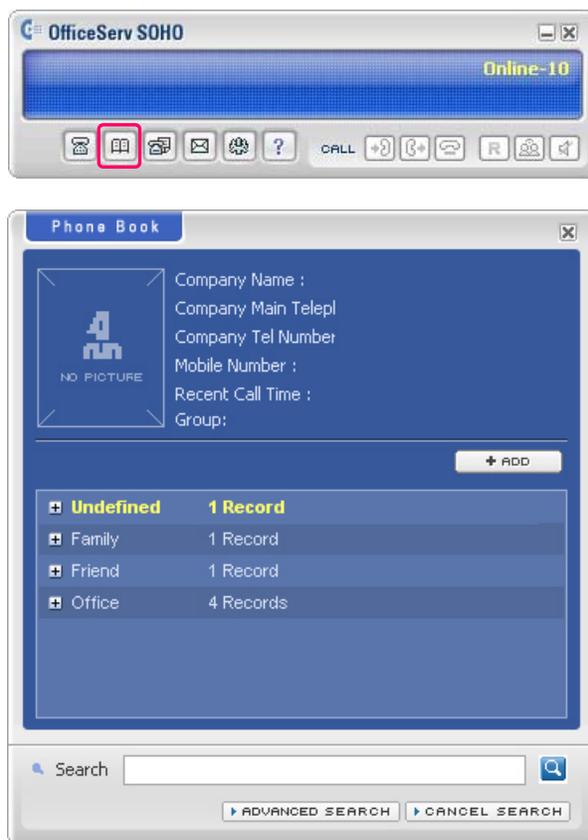
With [☐] button, you can show or hide the station status button field on the <Dial Pad> window.

The call control buttons are described below.

Buttons	Description
Answer 	Answer calls.
Dialout 	Makes a call.
Disconnect 	Disconnects the current call.
Recall 	Hold/ Retrieve/ Transfer/.
Conference 	Starts a conference call.
Mute 	Mute

Phonebook Menu

Click the [Phonebook] icon(☎) of the <Toolbar> menu window to display the <Phone Book> menu window shown below:



Searching Phonebook Data from Group List

Click the [+] button of the each group in the group list field to search a customer information registered to the corresponding group.

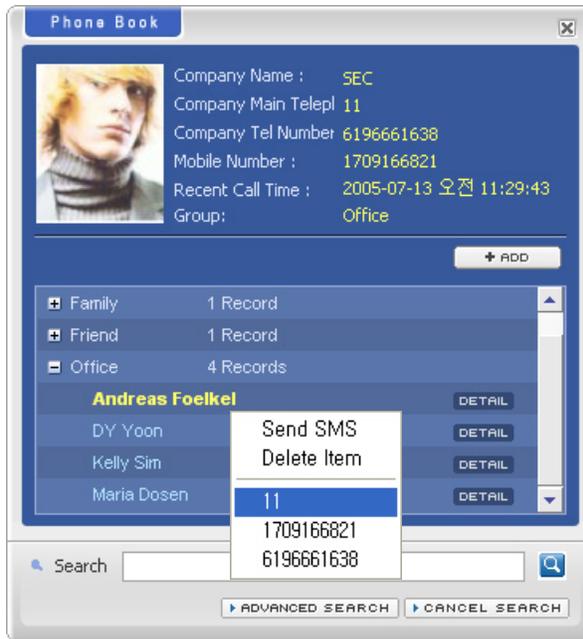


Click a desired name in the group list field to display the customer's basic information in the top of the phonebook menu.



Dialing from the Phonebook Menu Window

Click the right mouse button in the group list field. Select the [Dialing] menu from the popup menu.



Sending Message from the Phonebook Menu Window

Click the right mouse button in the group list field. Select the [Send SMS] menu from the popup menu.



 **NOTE** | **Sending Short Message from the Phonebook Menu Window**
For detailed procedure on sending short message, refer to '[Short Message] menu'.

Searching by Search Options

In the search data entry field of <Phone Book> menu, You can search the customer information by name.

Enter the content to be searched into the search data entry field and click the search button() to search a customer information that corresponds to the search condition.

The entire customer information is searched if the search data entry field is not entered.



Search Result

If a customer information that satisfies the search condition is found, the search result is displayed in the group list field.



Click a desired name in the group list field to display the customer's basic information in the top of the phonebook menu.



View Detail Info

Double click a desired name in the group list field to display the <Customer Information> window as shown below. Customer's detailed information is classified by categories. Select the extension button [▼].

The screenshot shows a 'Customer Information' window with the following data:

- Name:** Andreas Foelkel
- Company Name :** SEC
- Company Main Teleph** 11
- Company Tel Number** 6196661638
- Mobile Number :** 1709166821
- Recent Call Time :** 7/13/2005 11:29:43 AM
- Group:** Office

Buttons: DEL, OPEN

Detail Information

- Personal**
 - Company Name: SEC
 - Department: Sales Support Engineer
 - Company Tel Number: 6196661638
 - Mobile Number: 1709166821
 - E-Mail: [Empty]
 - Home Page: [Empty]
 - Nick Name: [Empty]
- Telephones** [▼]
- Miscellaneous** [▼]

Buttons: UPDATE

Call Log

11	July 13, 11:29:43	0:0:9'
11	July 13, 10:52:23	0:0:4'
11	July 13, 10:52:04	0:0:8'
11	July 13, 10:46:47	0:1:10'
11	July 13, 10:44:46	0:0:30'

Buttons: REFRESH



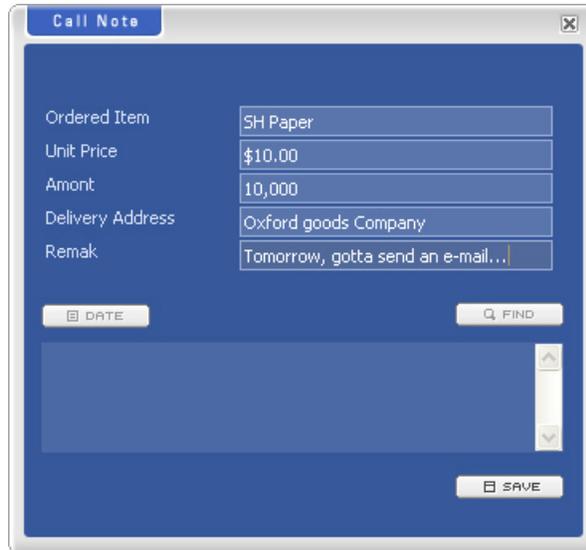
NOTE

Modifying categories and fields

For detailed information about modifying categories and fields, refer to 'Chapter 3. Menu Description' -> 'Configure' -> 'Field Setting'.

View Call Note

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



The screenshot shows a 'Call Note' dialog box with a blue background and a white border. The dialog has a title bar with 'Call Note' and a close button. The main area contains several text input fields with the following data:

Ordered Item	SH Paper
Unit Price	\$10.00
Amount	10,000
Delivery Address	Oxford goods Company
Remark	Tomorrow, gotta send an e-mail...

Below the input fields are two buttons: 'DATE' and 'FIND'. At the bottom right is a 'SAVE' button. There is also a vertical scrollbar on the right side of the dialog box.



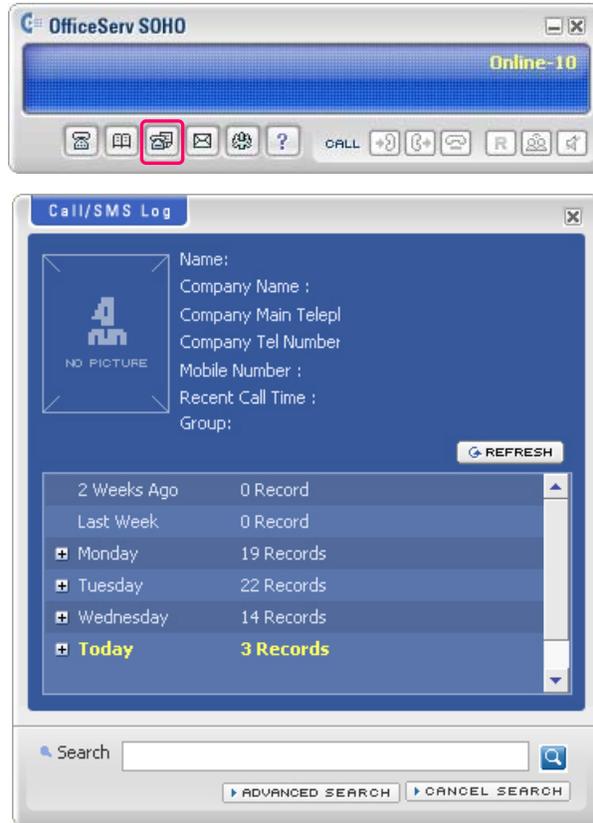
NOTE

Customer Information Entry/Modification/Remove

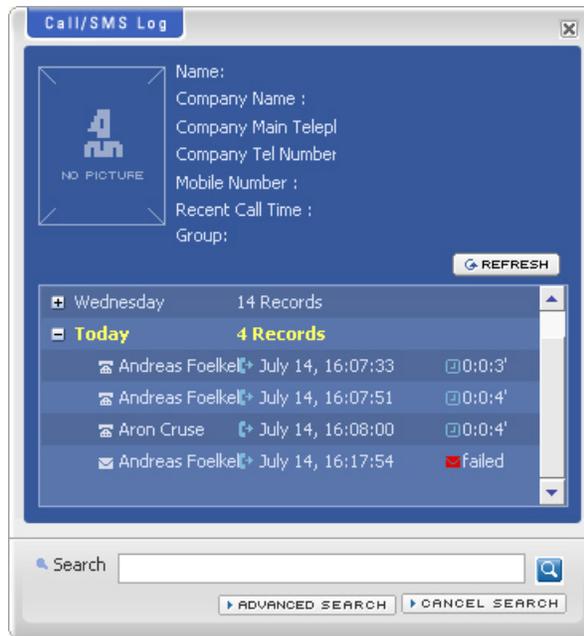
For detailed information about customer information, refer to 'Chapter 4. Customer information Information'.

Call/SMS Log Menu

Click the [Call/SMS Log] menu icon(☎) on the <Toolbar Menu> window to display <Call/SMS Log> menu window.



[Call/SMS Log] menu displays call histories and SMS log in recent days/weeks. Click the [+] button to display the calling history and short message data.

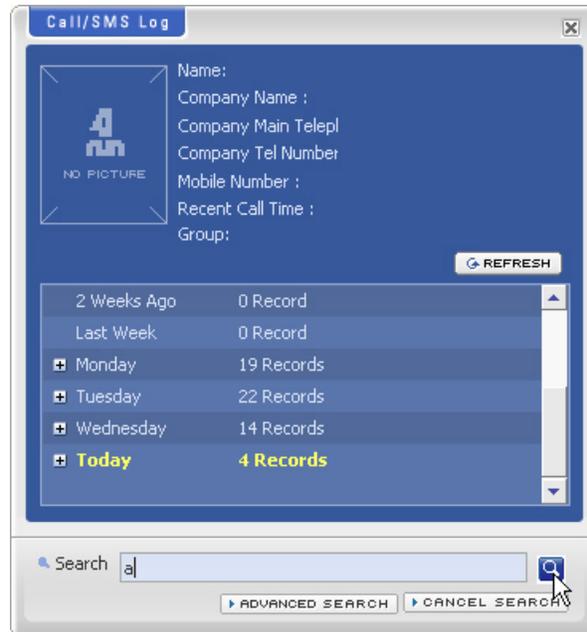


Calling histories and sort messages are classifies with the following icons:

Icons	Description
	Incoming Call
	Outgoing Call
	Incoming Message
	Outgoing Message

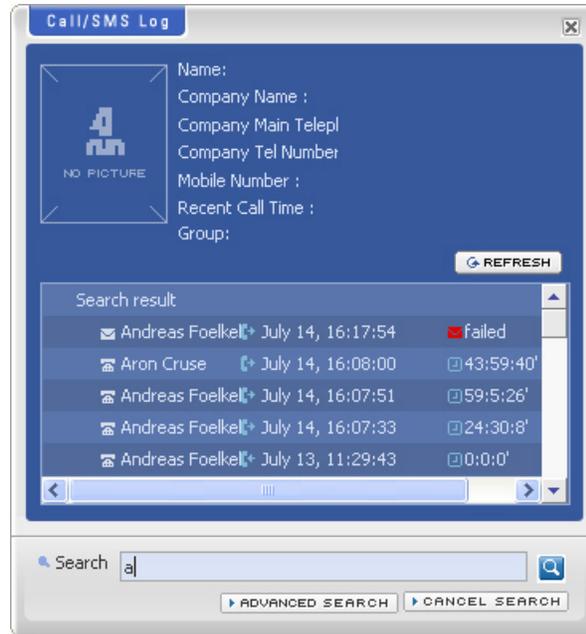
Searching Call/SMS Log

Enter desired contents in the search contents entry field, and click the [🔍] icon to display the data matching with the condition.



Search Result

If there are data that meet the search condition, the relevant data appears in the search result field.



View Call Note

Double click the call log to display the <Call Note> window recorded in calling, and then the <Call Note> window will appear as shown below.



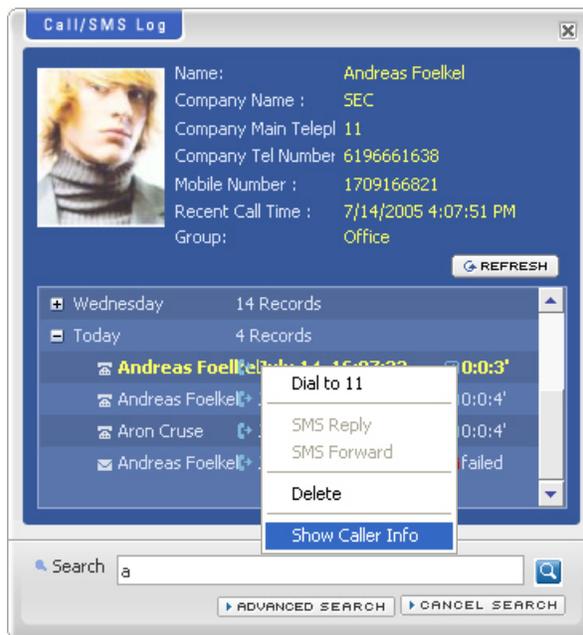
View the contents of SMS

Double click the SMS log to display the <SMS Messages> window.



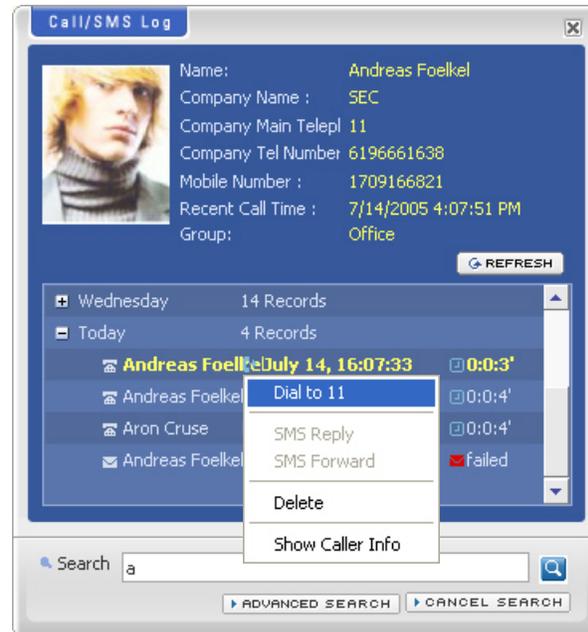
View detail customer information

Click the right mouse button in the log list field. Select the [Show Caller Info] menu in the popup menu.



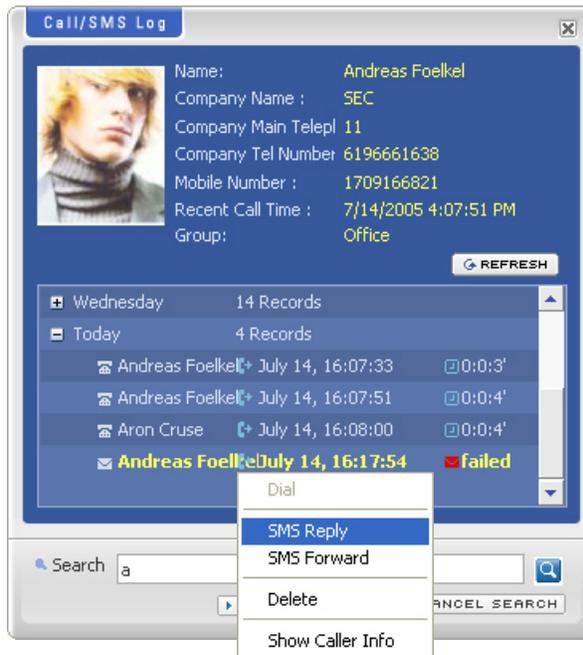
Calling up from the <Call/SMS Log> menu window

Click the right mouse button in the log list field. Select the [Dial] from the popup menu.



Forwarding /Replying Message on the <Call/SMS Log> menu window.

Click the right mouse button in the log list field. Select [SMS Forward] or [SMS Reply] in the popup menu.



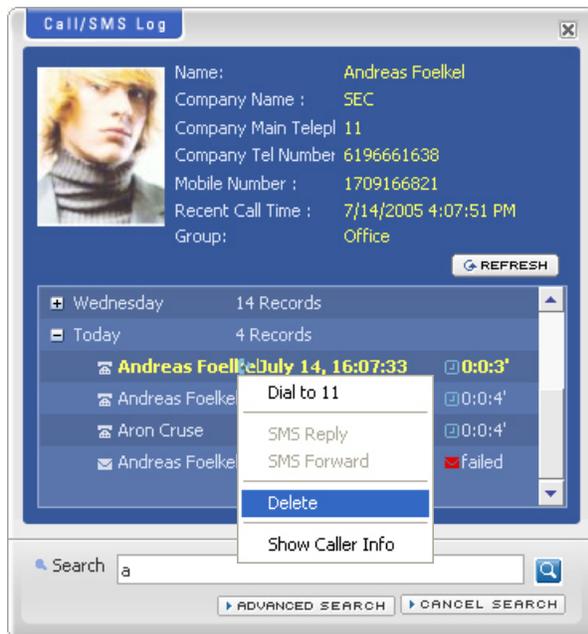
NOTE

Forwarding /Replying Message on the <Call/SMS Log> menu window

For detailed information about how to send short message, refer to [SMS Service] menu.

Removing Call/SMS Log

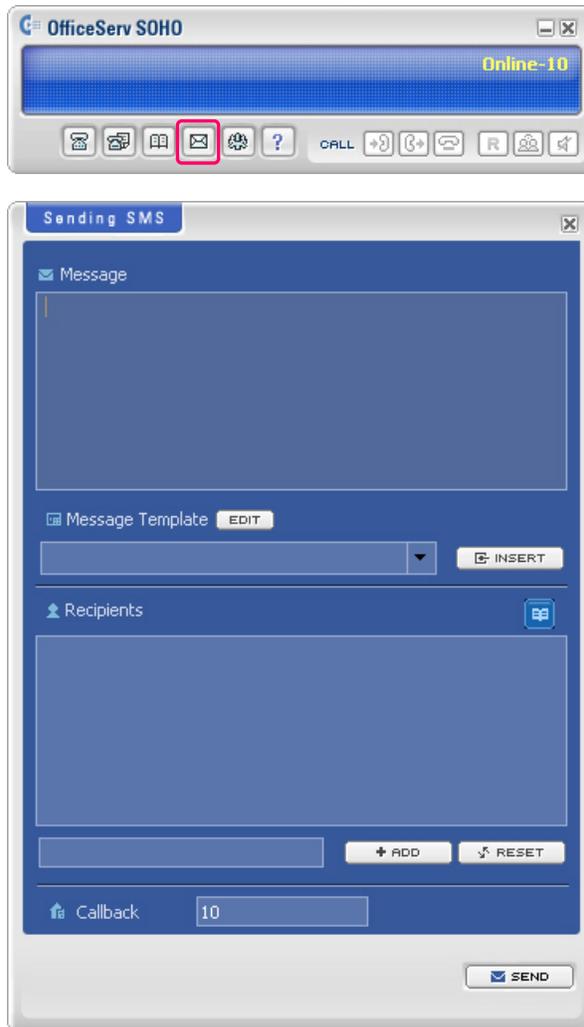
Click the right mouse button in the log list field. Select the [Delete] menu in the popup menu.



Short Message Service (SMS) Menu

Sending SMS

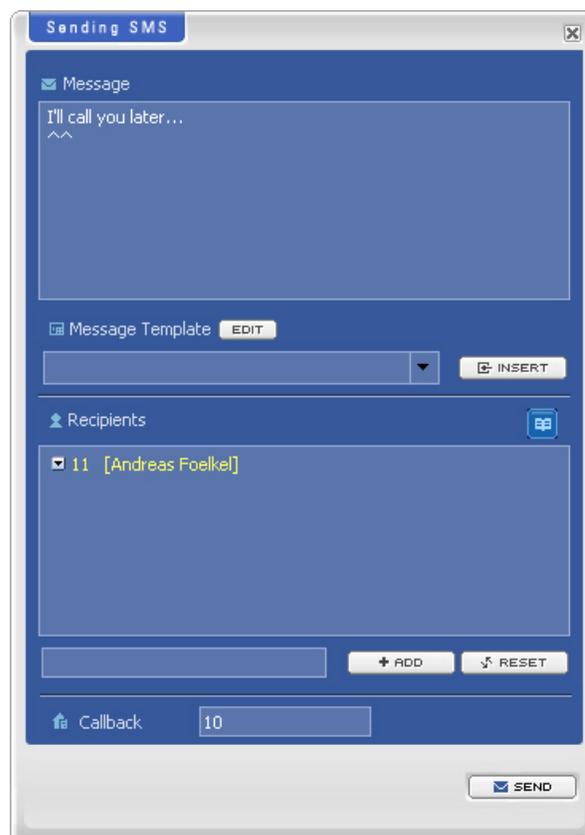
Click the [Short Message Service] icon(☒) of the Toolbar menu window to display the following <Sending SMS> menu window:



The procedure to send a short message is as follows:

1. Enter the message to the message text field.

2. Enter the phone number of the recipient into the Destination field and click the [+ADD] button to add the item to the Destination list field.
3. To delete a phone number from the Destination field, right click the target number and select [Remove Item].
4. Enter the return number, including the area code, into the Callback field.
5. Click the [SEND] button.



6. If the message is transferred, the following message is displayed to tell the message sending. Click the [OK] button.



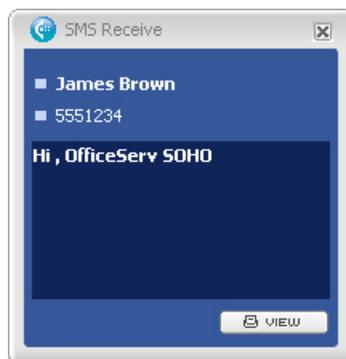
NOTE

Importing Receiving Phone Numbers from the Phonebook
 Click the [Phone Book] icon (📞) on the <Sending SMS> menu window to display <Phone Book> menu window. drag and drop the destination phone number to the 'receiving list' of the <Sending SMS> menu window.

Frequent Message Field
 Frequent message is used in short messages by editing or storing.

Checking SMS

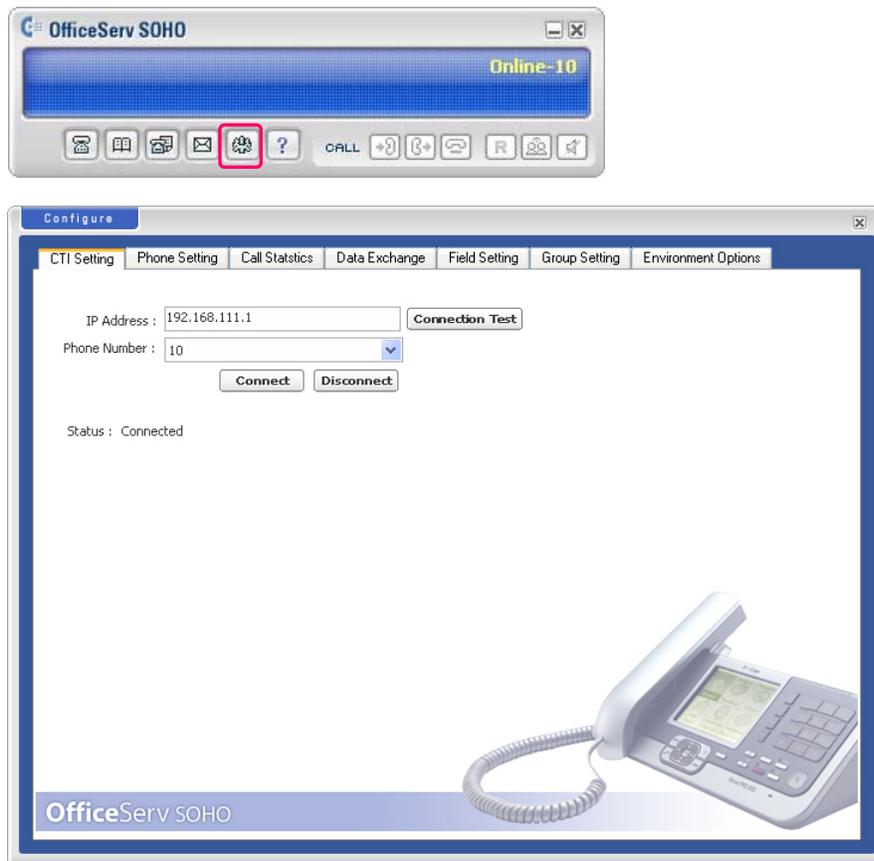
If a short message arrives, an message alarm in OS SOHO and a message to tell the arrival of a message appears on the <SMS Receive> window .



Click the [VIEW] button to display the arrived message. In additions, incoming/outgoing messages are displayed in the [Call/SMS Log] menu.

Configure Menu

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



Configurable items are categorized as tabs in the <Configure> menu window. Different data items are displayed for each tab, which are described below:

- CTI Setting: Configures the line interfacing with OS SOHO and sets registration data.
- Phone Setting: Configures call forwarding busy/no answer
- Call Statistics: Appears charges by lines or weeks in a specified term and displays or stores the calculated charge in graphic or data.
- Data Exchange: Phonebook data interworking between OS SOHO CRM and Microsoft Outlook/Excel.
- Field Setting: Configures the customer information field of the [Phonebook]

menu and the field of [Call/Message Log] menu.

- Group Setting: Configures customer information registration phonebook group.
- Additional Setting : Configures additional environment setting

CTI Setting

The procedure to set the station data of a OS SOHO CRM user is as follows:

Select the [CTI Setting] tab on the <Configure> menu window.



1. Enter the IP address of the OS SOHO in the IP address field.
- To do the connection test, click the [Connection Test] button.



NOTE

When starting the Program for the First Time After Installation

When the OS SOHO CRM program is executed for the first time after installation, the IP address of the mainframe is set to '192.168.111.1' by default.

Checking the IP address of the OS SOHO mainframe

If you don't know the IP address of the OS SOHO mainframe, refer to the 'Menu' -> 'Phone Setting' -> 'Network Setting' of the OS SOHO mainframe.

For more information about checking the IP address of the mainframe, refer to the 'OS SOHO User Guide'.

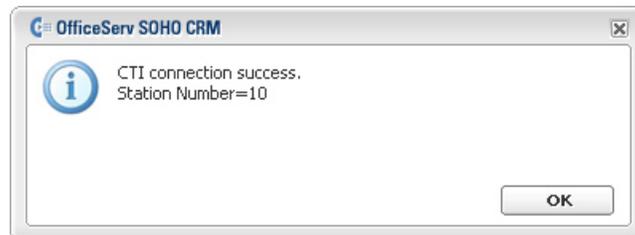
2. Click the [▼] button nearby the phone number field to select the extension number of the OS SOHO main frame or the wireless terminal interfacing with the OS SOHO CRM program, and click the [Connect] button.
 - When disconnecting, click the [Disconnect] button.

3. The <Password Check> window appears as shown below.
 - The password is the one of the OS SOHO mainframe. The initial password is '0000'.



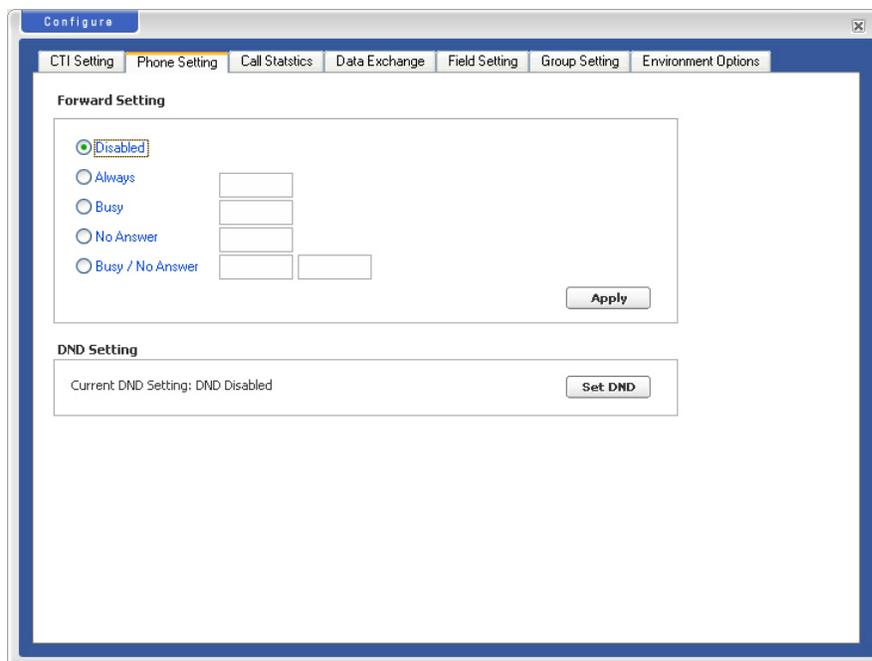
4. Enter the password and click the [OK] button.

5. A message to tell the success of the connection will appear on the window shown below. Click the [OK] button.



Phone Setting

Select the [Phone Setting] tab in the <Configure menu> window.



The types of the phone setting are as follows:

Types	Description
Disable	Releases the status of call forwarding.
Forward Always	Forwards all incoming calls to the configured destination.
Forward on Busy	Forwards incoming calls to the configured destination during busy call times.
Forward on No Answer	Forwards incoming calls to the configured destination when not receiving the calls for a specified time.
Forward On Busy or No Answer	Forwards to the configured destination during busy call times or for unanswered calls.
DND	Denies to forward all calls.

The procedure to forward calls is as follows:

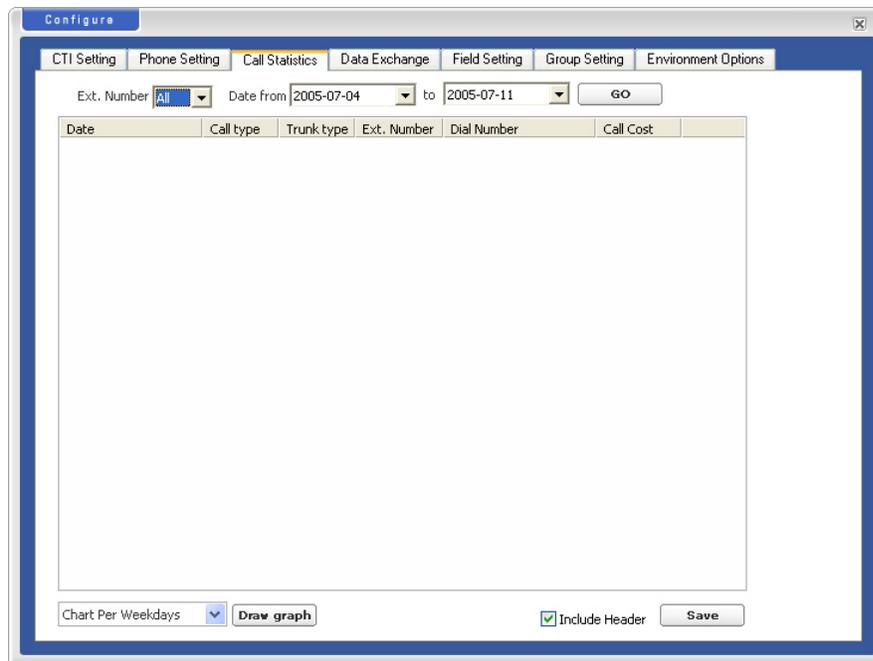
- 1.** Select the types of the phone setting
- 2.** Enter the destination phone number in the Destination field, and click the [Apply] button .

To do DND setting, click the [Set DND] button ,and then the caption of the button is going to change from [Set DND] to [Cancel DND].

To Cancel DND, click the [Cancel DND] button. and then the text of the button will change back into [Set DND].

Call Statistics

Click the [Call Statistics] tab on the <Configure> menu window



You can calculate the charges for all phones or a particular phone interfaced with the OS SOHO.

The procedure to calculate the charges is as follows:

1. Specify the phone number to calculate a charge in the phone number field. You can calculate the charges for all phones or a particular phone.
2. Specify the period to calculate the charge in the period selection field.
3. Click the [GO] button to display the call statistics as shown below.

Configure

CTI Setting Phone Setting **Call Statistics** Data Exchange Field Setting Group Setting Environment Options

Ext. Number **All** Date from 2005-07-04 to 2005-07-11 **GO**

Date	Call type	Trunk type	Ext. Number	Dial Number	Call Cost
2005-07-05 오후 8:...	Out	BRI	10	3	0
2005-07-08 오후 1:...	Out	BRI	10	46547	0
2005-07-08 오후 1:...	Out	BRI	10	46547	0
2005-07-08 오후 2:...	Out	BRI	11	2222221212122	0
2005-07-08 오후 3:...	Out	BRI	11	6196661638	0
2005-07-08 오후 4:...	Out	BRI	10	6196661638	0
2005-07-08 오후 4:...	Out	BRI	10	6196661638	0
2005-07-08 오후 4:...	Out	BRI	10	077863135	0
2005-07-08 오후 4:...	Out	BRI	10	10	0
2005-07-08 오후 4:...	Out	BRI	10	11	0
2005-07-08 오후 5:...	Out	BRI	10	19	0
2005-07-11 오전 10:...	Out	BRI	11	23	0
2005-07-11 오후 1:...	Out	BRI	10	11	0

Chart Per Weekdays **Draw graph** Include Header **Save**



NOTE

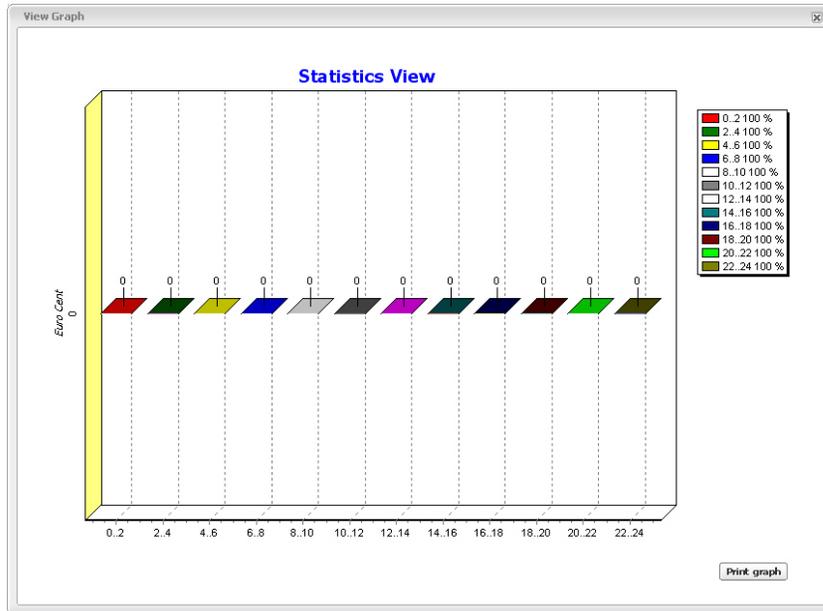
Saving as a CSV File

The [Save] button enables to save a charge calculation result as a file divided by comma.

4. Decide the graph option in the graph option field.



5. Click the [Draw graph] button to display the charge statistics graph according to the specified graph option, and then the <View Graph> window appears as shown below.



NOTE

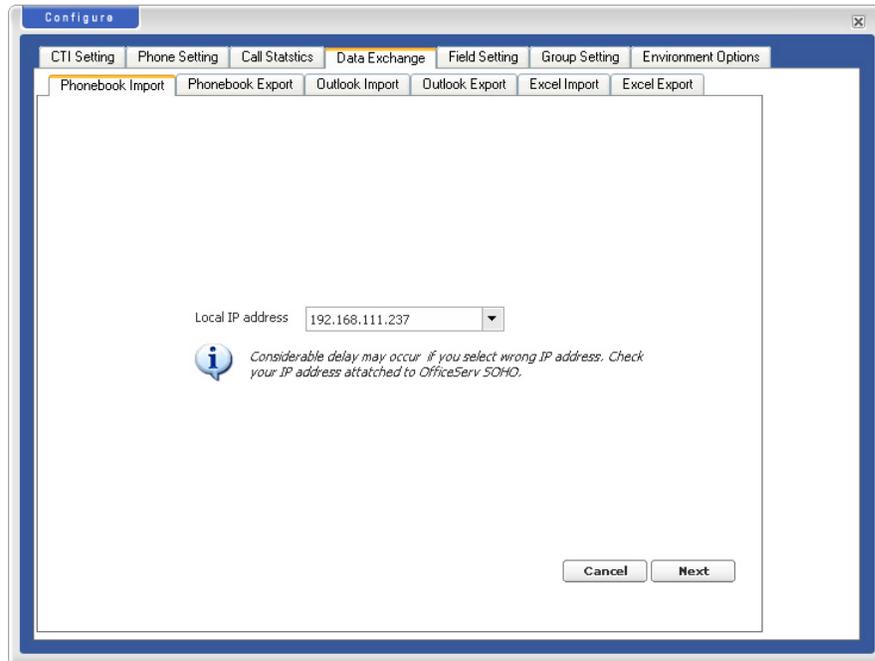
Printing graph

The [Print graph] button enables to print a charge statistics graph.

Data Exchange

The procedure for interworking data between OS SOHO CRM and an external phonebook is as follows:

Select the [Data exchange] tab of the <Configure> menu window.



Configurable items are categorized as tabs. Different data items are displayed for each tab, which are described below.

Synchronizing the Data in the OS SOHO Phonebook

Select the [Phonebook Import] or the [Phonebook Export] tab to interface the data between the OS SOHO CRM and OS SOHO Phonebook.

Synchronizing MS Outlook Phonebook

Select the [Outlook Import] or the [Outlook Export] tab to interface the data between the OS SOHO CRM and Microsoft Outlook phonebook

Synchronizing MS Excel Phonebook

Select the [Excel Import] or the [Excel Export] to interface the data between the OS SOHO CRM and Microsoft Excel phonebook.



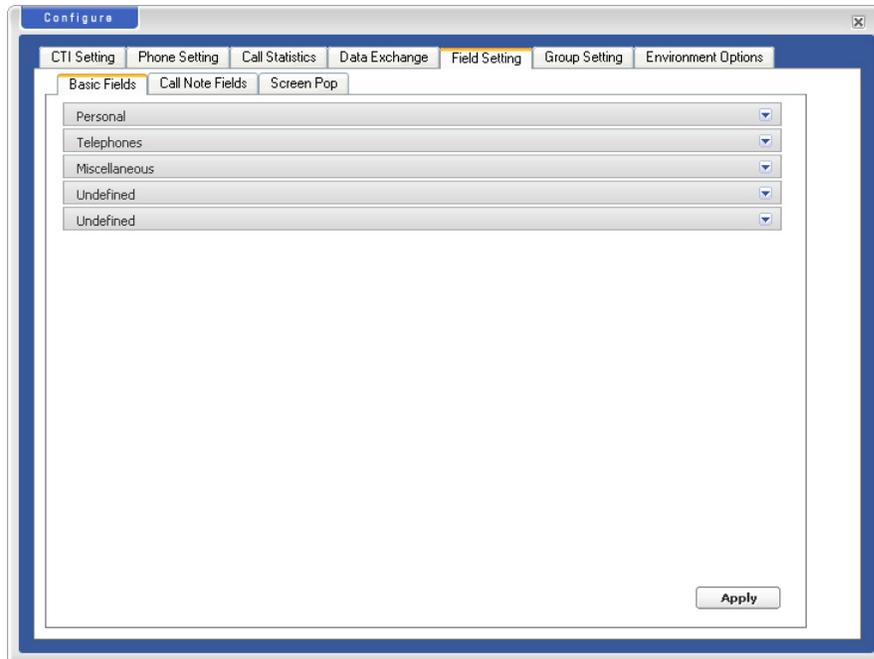
NOTE

Data Synchronization Between OS SOHO CRM and Outlook/Excel

For procedure on synchronizing the phonebooks between OS SOHO CRM and Microsoft Outlook/Excel, refer to 'External Phonebook Management' of 'Chapter 4. Customer Information Management'.

Field Setting

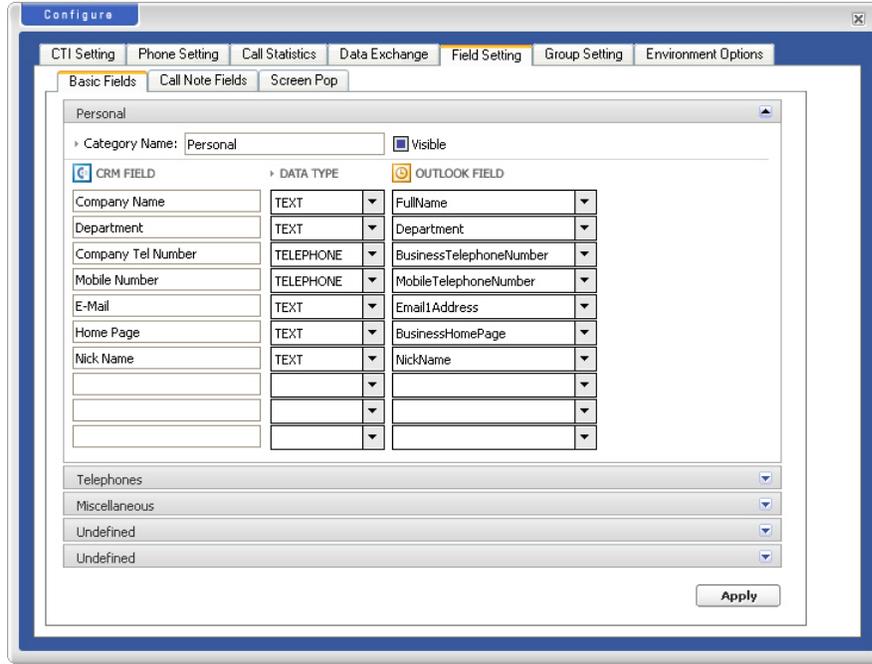
Select the [Field Setting] tab on the <Configure> menu window



Configurable items are categorized as tabs. Different data items are displayed for each tab, which are described below.

Specifying categories and fields on the <Customer Information> window

Click the [Basic Fields] tab .

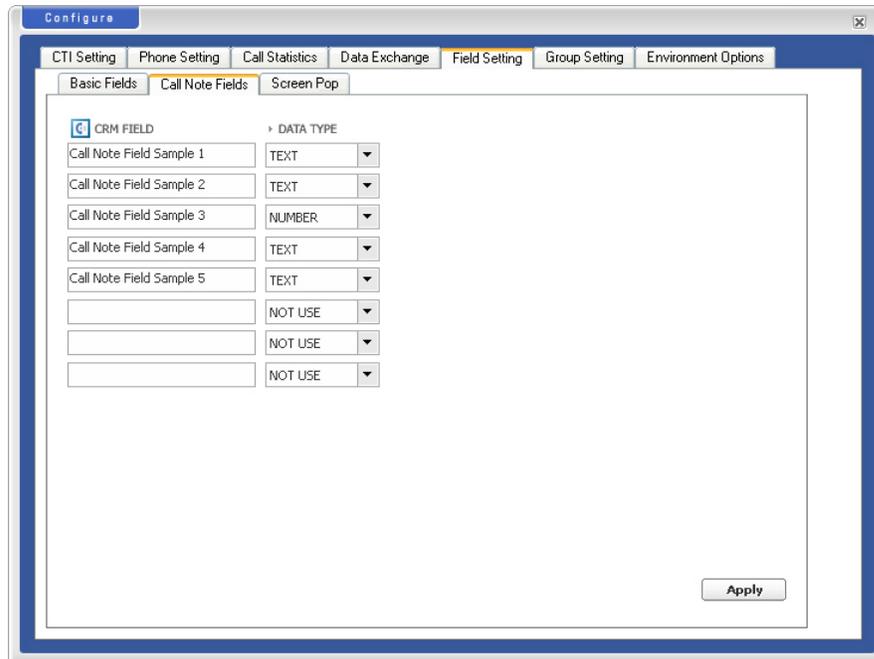


The currently configure customer information category and field contents and data types by categories can be modified. Select the [▼] button of the category to be modified to display the attribute of the category field. Select the field contents and the data types of the field to be modified, and click the [Apply] button.

The edited information can be displayed on the <Customer Information> window from the [Phone Book] menu.

Specifying Fields on the <Call Note> Window

Select the [Call Note Fields] tab.



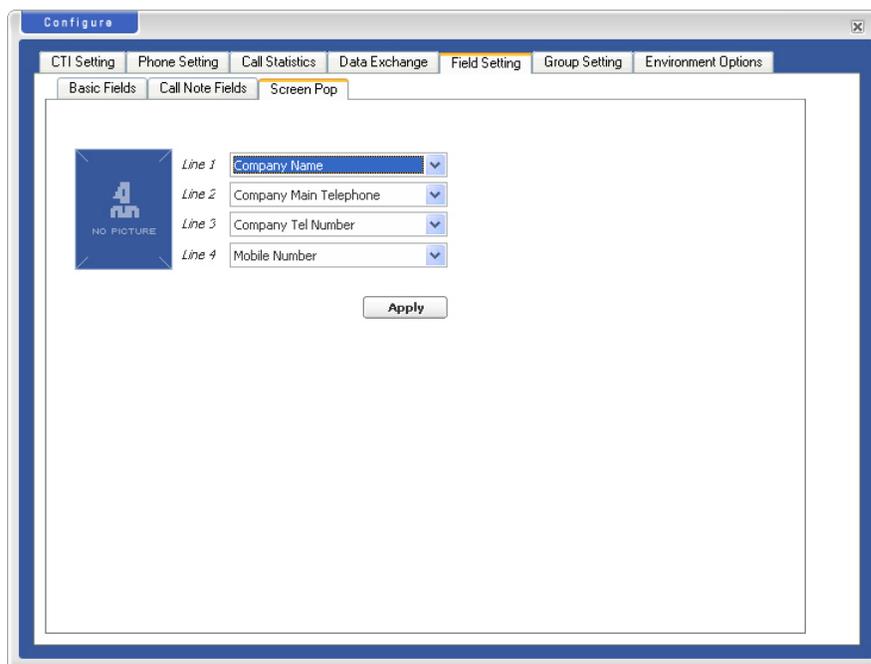
To edit the currently configured call record field, select a desired item and edit the contents in the entry field. Click the [Apply] button after specifying the data type.

The Double click of the call log of the [Call/SMS Log] menu or the <Customer Information> window enables to check the edited fields on the <Call Note> window.

Specifying Fields on the SCREENPOP window

Select the [Screen Pop] tab.

Select the items to edit and edit the field entry items to edit the currently configured fields. Click the [Save] button.

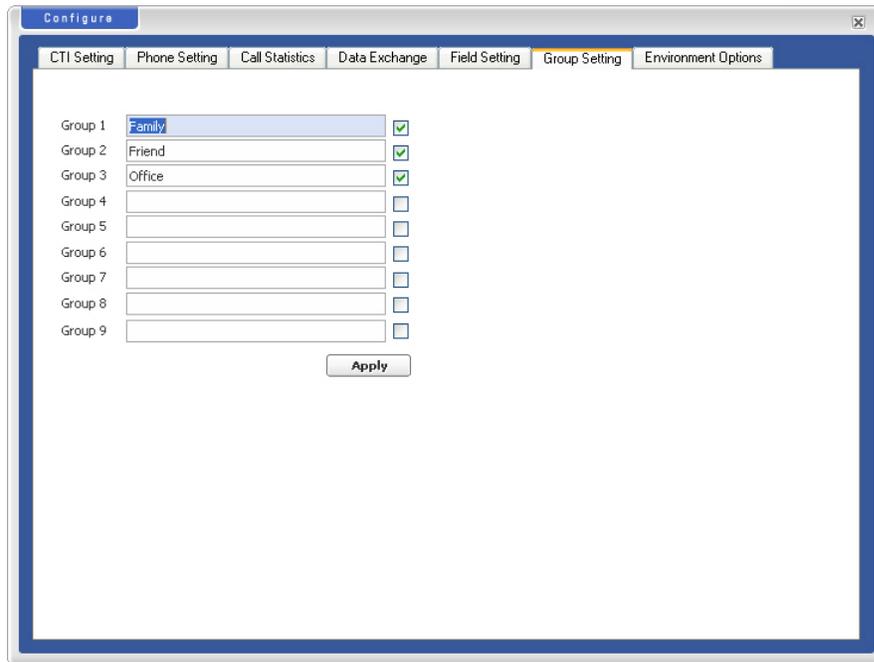


The edited information is displayed on the brief <Customer Information> window or the <Calling Notification> window that pops up for the incoming /outgoing call.

Group Setting

The procedure for configuring a group to register customer information is as follows:

Select the [Group Setting] tab of the <Configure menu> window.



Add Group

To add a new group, check in the unchecked box and the name of the new group into the group name entry field, and click the [Apply] button. It is possible for up to 9 groups .

Update Group

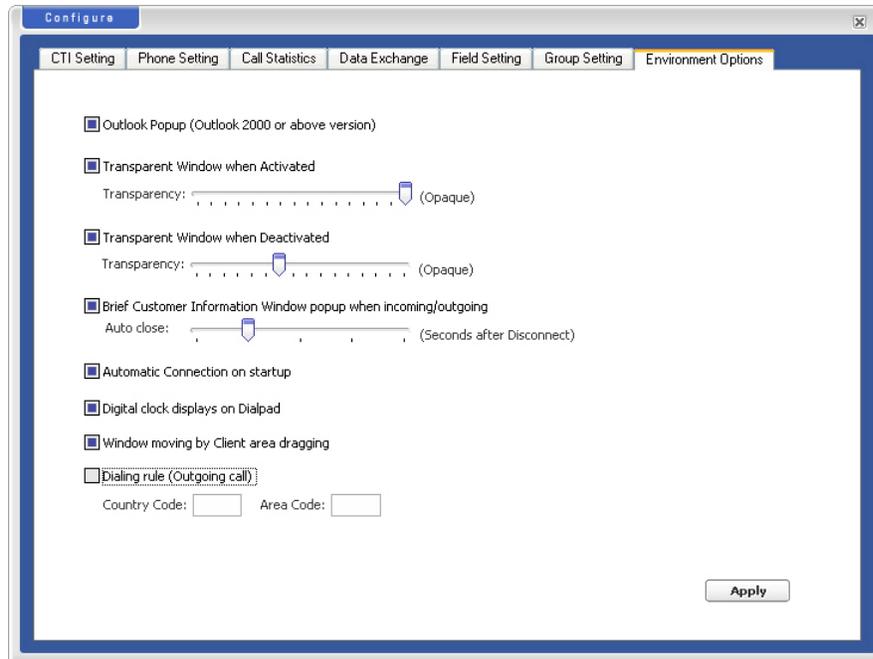
To update the registered group information, modify the information in group name entry field and click the [Apply] button.

Delete group

To delete the registered group information, check in the checked box and click the [Apply] button

Additional Setting

Select the [Additional Setting] tab of the <Configure menu> window.



The following items can be configured in the [Additional Setting] tab window.

Outlook popup

If you wish, you can allow the <Outlook contacts> window to appear when incoming. To Set this option, the contact have to be registered in the Outlook contacts before you use this option.

Transparent window when activated

Setting this option, you can control the transparency of the activated window.

Transparent window when deactivated

Using this option, you can control the transparency of the deactivated window.

Brief customer information window popup when incoming/outgoing

You can allow the brief customer information window to appear when incoming and outgoing.

Automatic connection on startup

If you wish, you can allow OS SOHO CRM to start automatically each time you start windows.

Digital clock displays on dialpad

Setting this option, you can display the digital clock on the dialpad.

Window moving by client area dragging

Using this option, you can allow the window to move following the mouse dragging.

Dialing rule (Outgoing call)

When you make External Calls, country code or area code is automatically added to target phone number.

To use the each option, check in the unchecked box and control the level if necessary , and the click the [Apply] button.

Help Menu

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



The <Help> menu window allows users to easily search through brief descriptions on how to use the functions of OS SOHO CRM.



CHAPTER 4. Customer Information Management

This chapter describes how to register customer information or search the registered phonebook.

Customer Information Entry

Follow the steps below to enter customer information.

1. Click the [Phone Book] menu icon(☎) on the <Toolbar> menu window, and the <Phone Book> menu window below will appear.



2. Click the [+ADD] button, and the <Add New Customer> menu window shown below will appear.

The screenshot shows a software window titled "Add New Customer". At the top left is a "NO PICTURE" placeholder with a camera icon and "DEL" and "OPEN" buttons. To the right are "Name:" and "Group:" labels with corresponding input fields. The "Group" dropdown is currently set to "Undefined". Below this is a "Personal" section with a list of fields: "Company Name", "Department", "Company Tel Number", "Mobile Number", "E-Mail", "Home Page", and "Nick Name". Underneath are "Telephones" and "Miscellaneous" sections, each with a dropdown arrow. At the bottom of the window are "RESET" and "+ ADD" buttons.

3. Enter the customer information to be reentered.
4. Click the [OPEN] button to register the customer's photo.
 - Click the [DEL] button to delete the customer's photo.
5. If the entry of customer information is completed, click the [+ADD] button.
 - Click the [RESET] button to clear all.



NOTE

Registering Photos

Photos should be saved in your PC as image file formats beforehand.

Phonebook Management

Follow the step below to interface phonebook data between OS SOHO CRM and Microsoft Outlook/Excel data.

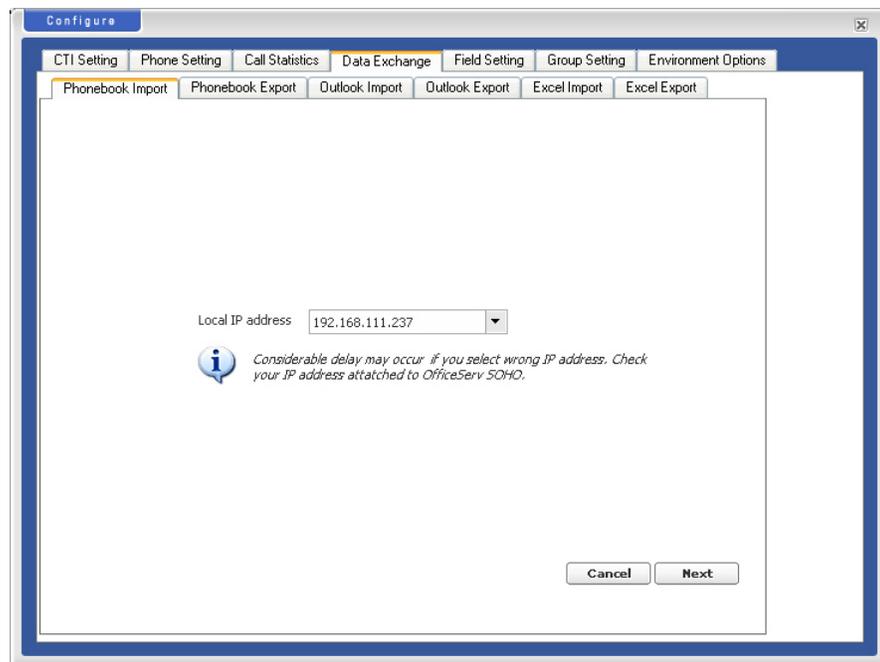
Click the <Configure> menu icon() on the <Toolbar> and select the [External Phonebook] tab.

Synchronization of OS SOHO Phonebook Data

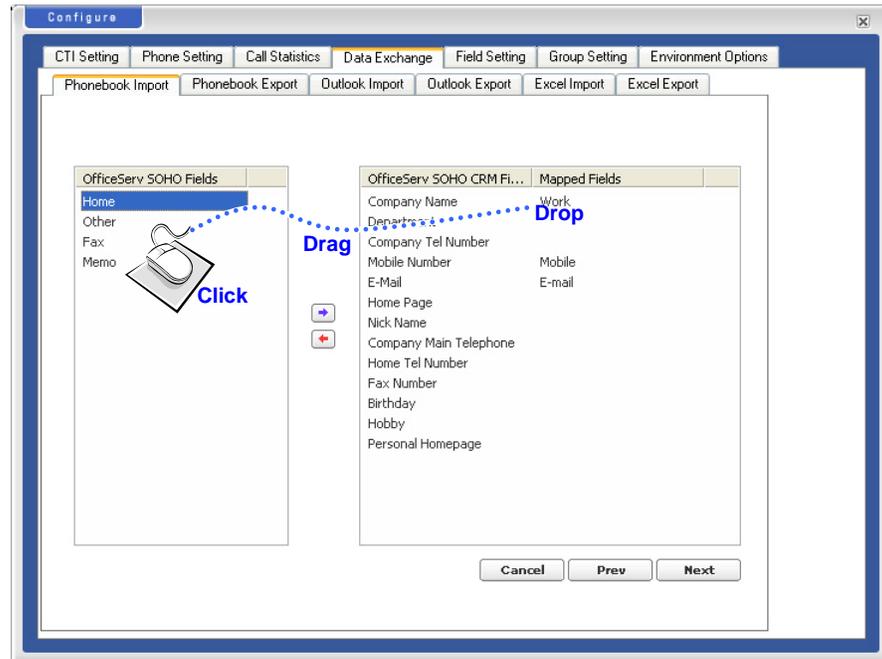
Importing OS SOHO Phonebook Data

The procedure to import the phonebook data of the OS SOHO to OS SOHO CRM is as follows:

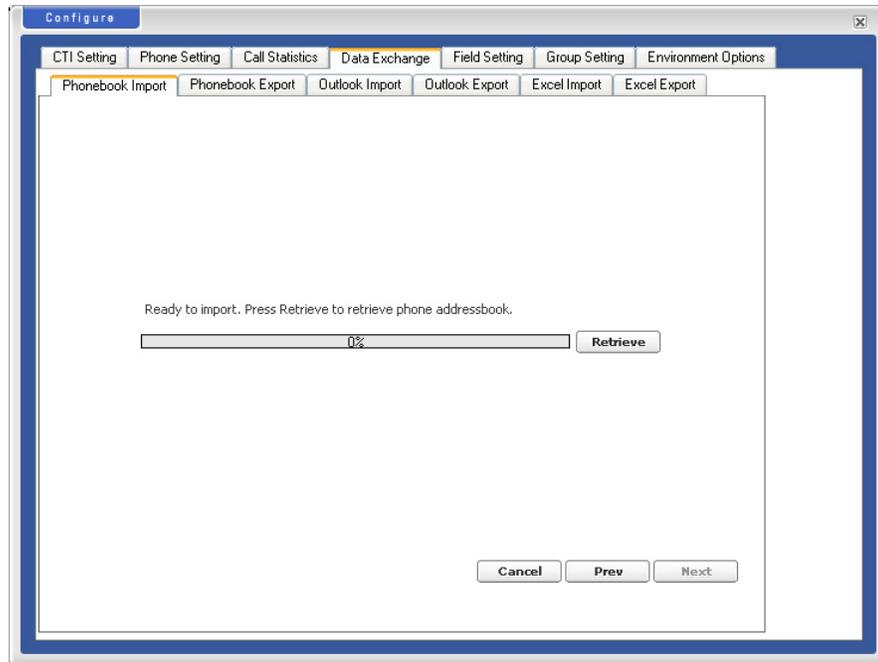
1. Select the [Phonebook Import] tab and the following window will appear.



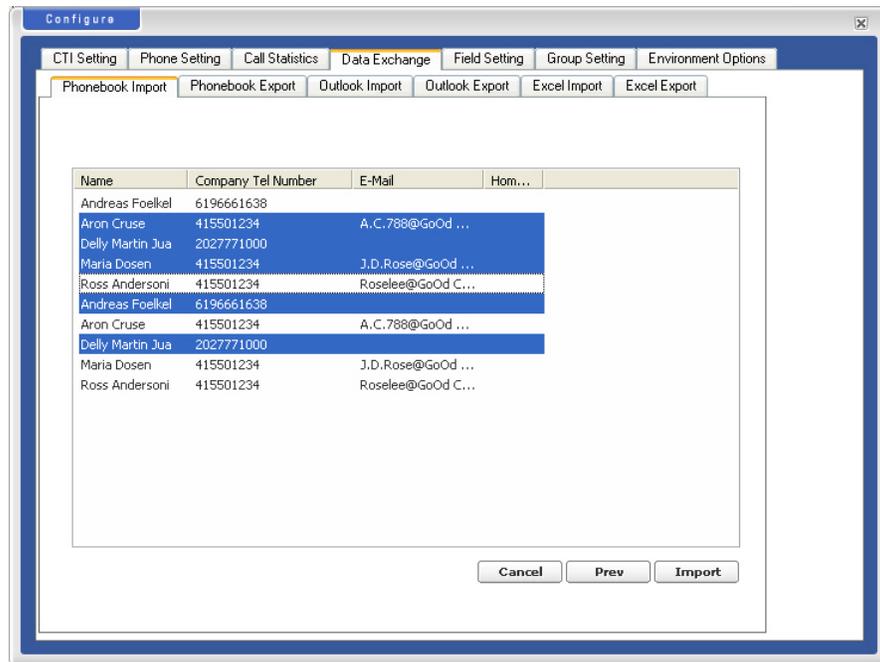
2. Enter IP of the OS SOHO and click the [Next] button.
3. Perform mapping between the customer information field in the phonebook of OS SOHO CRM and the customer information field in the phonebook of OS SOHO. After mapping, click the [Next] button.



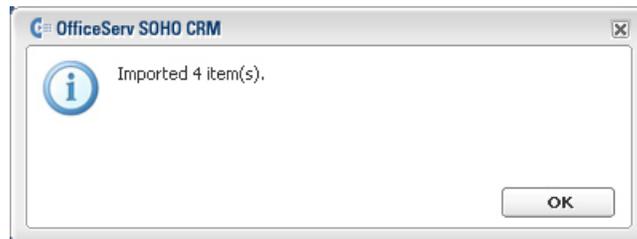
4. Click the [Retrieve] button on the <OS SOHO phonebook data download> window. The download starts and the progress bar shows the downloading status. After importing, click the [Next] button.



5. Select the data of the OS SOHO phone to import and click the [Import] button.



6. The <Message> window to tell the completion of the phonebook data import will appear. Clcik the [OK] button.



Exporting to OS SOHO Phonebook Database

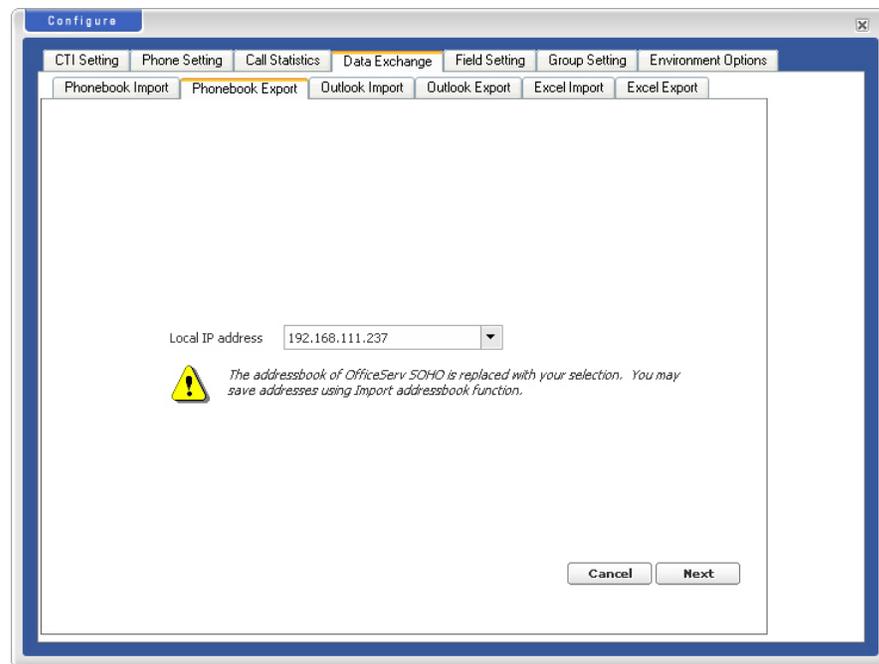
The procedure to export the phonebook data of OS SOHO CRM to the OS SOHO is as follows:


CHECK

Exporting Phonebook Data in OS SOHO CRM

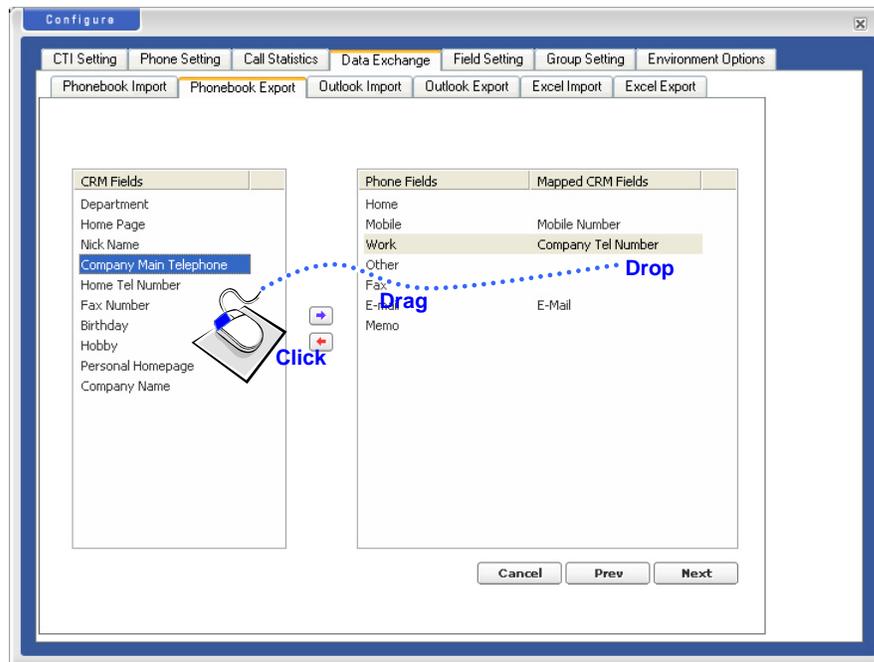
If the phonebook data of the OS SOHO are exported, all phonebook data in OS SOHO CRM program overwrite the phone book data of the OS SOHO. Make sure that important files should be backed up in advance.

1. Select [Phonebook Export] tab, and the following window will appear.

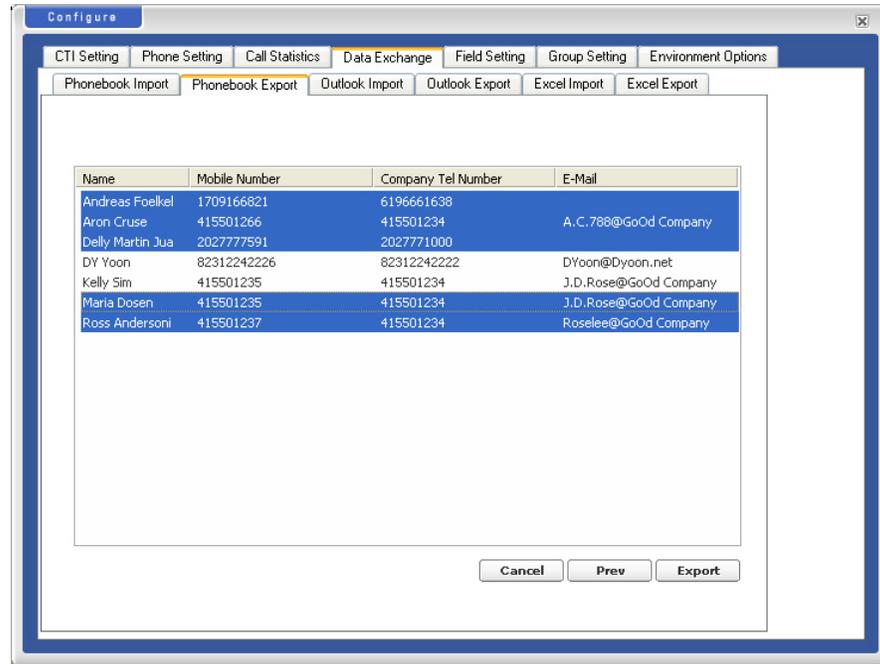


2. Enter IP of the OS SOHO and click the [Next] button.

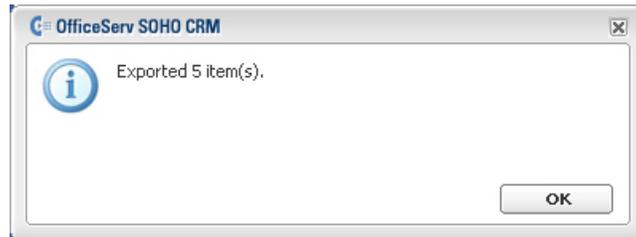
3. Perform mapping between the customer information field in the phonebook of OS SOHO CRM and the customer information field in the phonebook of OS SOHO. After mapping, click the [Next] button.



4. Select the phonebook data to export to the OS SOHO and click the [Next] button.



5. The <Message> window to tell the completion of the phonebook data export will appear. Click the [OK] button.

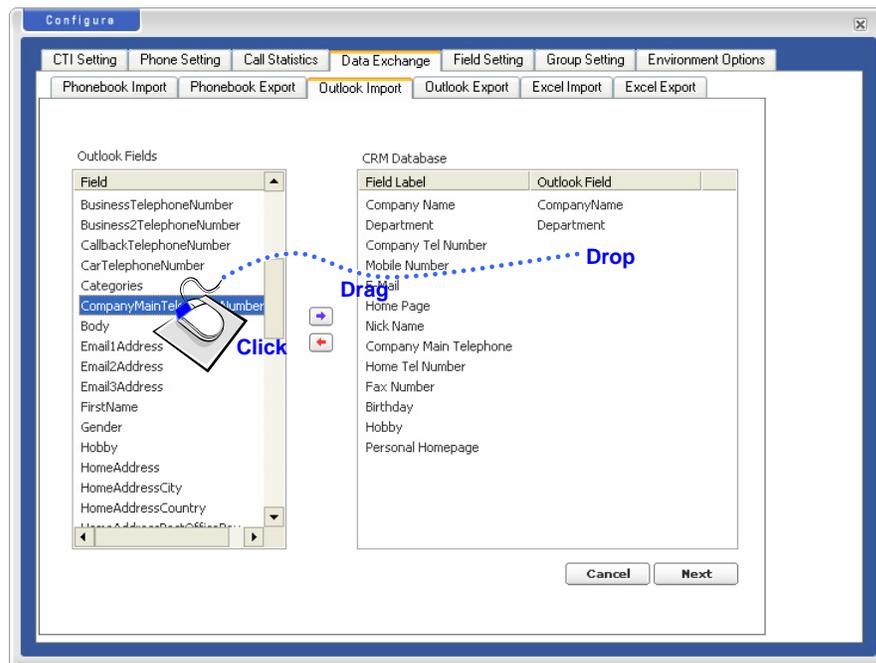


Synchronization of Microsoft Outlook Phonebook Data

Importing Data from Microsoft Outlook Phonebook

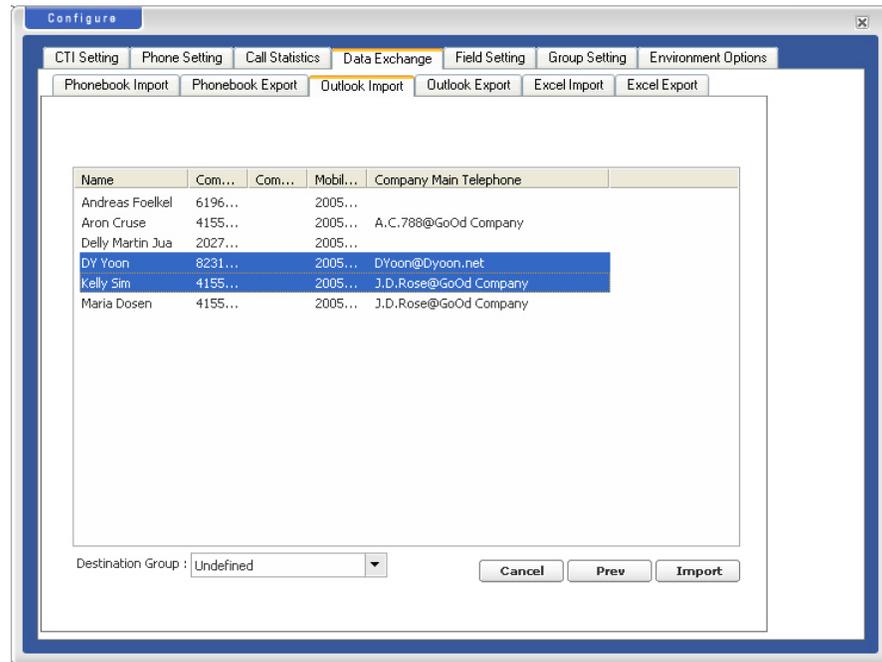
The procedure to import the phonebook data of Microsoft Outlook to OS SOHO CRM is as follows:

1. Select [Outlook Import] tab, and the following window will appear.

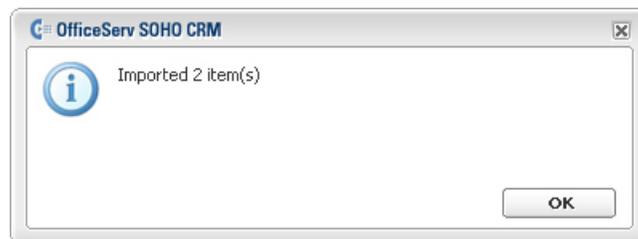


2. Perform mapping between the customer information field in the phonebook of Microsoft Outlook Phonebook and the customer information field in the phonebook of OS SOHO. After mapping, click the [Next] button.

3. Select the data to import and click the [Import] button.



4. A message window to tell the completion of the import will appear. Click the [OK] button.



NOTE

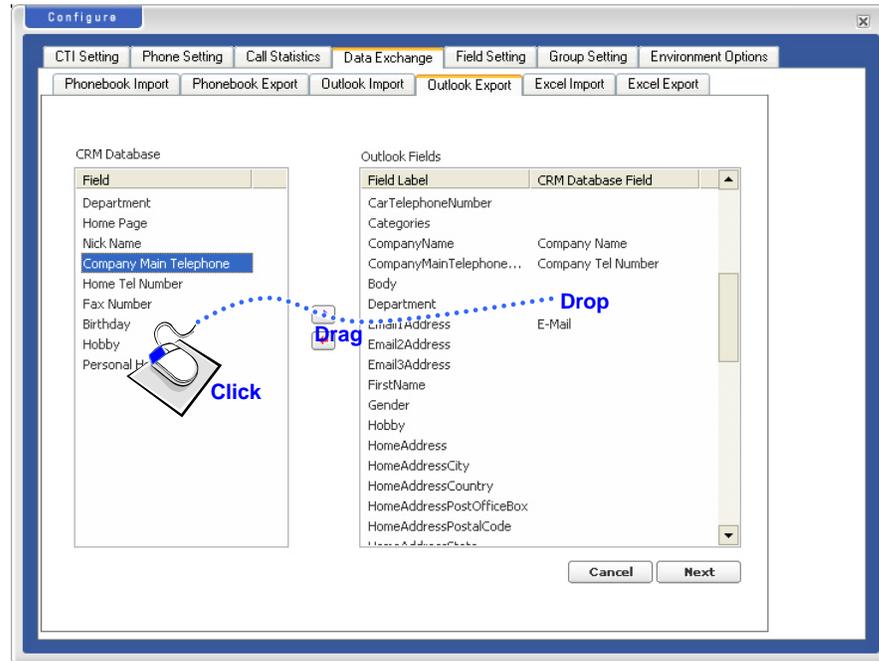
Message Displayed When Microsoft Outlook Phonebook Data is Imported

Once a message 'A program will access the e-mail address stored in Outlook. Do you want to continue? If you do not expect the access, it may be virus. Select [NO]' appears, select the access allowed time checkbox to set the allowed time. Then, click the [Yes] button.

Exporting to Microsoft Outlook Phonebook

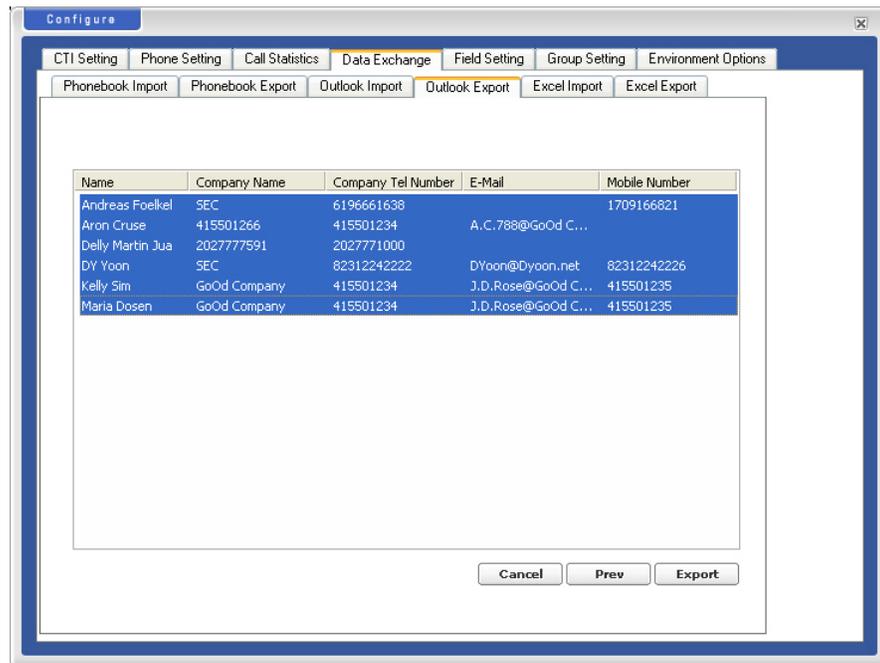
The procedure to export the phonebook data of OS SOHO CRM to Microsoft Outlook phonebook is as follows:

1. Select [Outlook Export] tab, and the following window will appear.

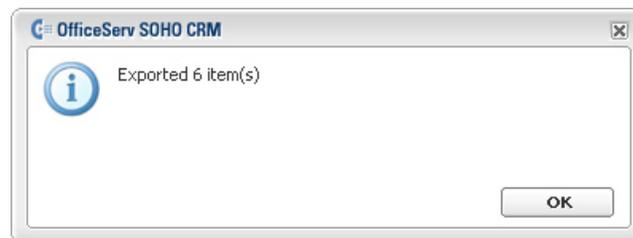


2. Perform mapping between the customer information field in the phonebook of Microsoft Outlook Phonebook and the customer information field in the phonebook of OS SOHO. After mapping, click the [Next] button.

3. Select the data to export and click the [Export] button.



4. A message to tell the completion of the export will appear on the window shown below. Click the [OK] button.

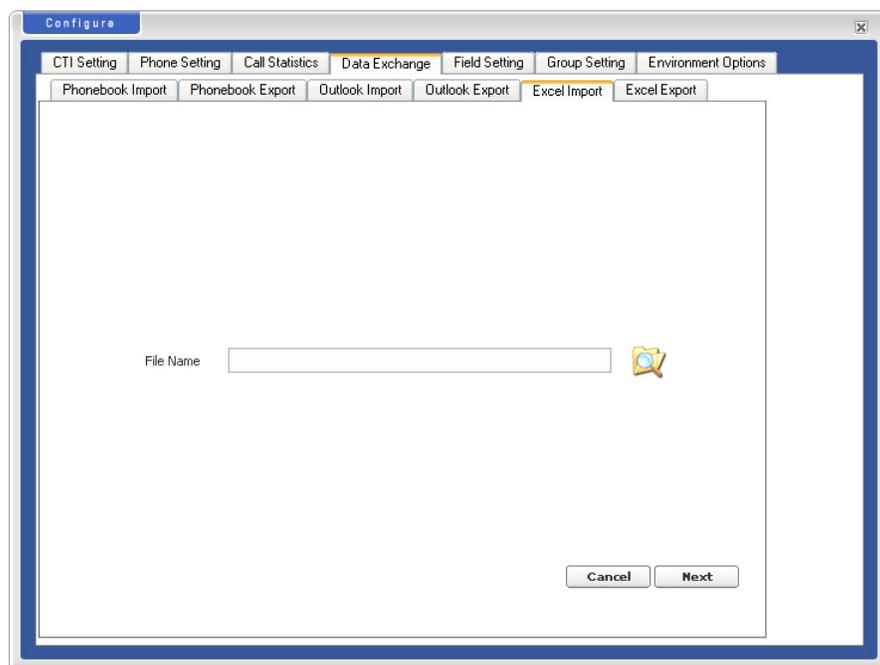


Synchronization of Microsoft Excel Phonebook Data

Importing Phonebook Data from Microsoft Excel File Format

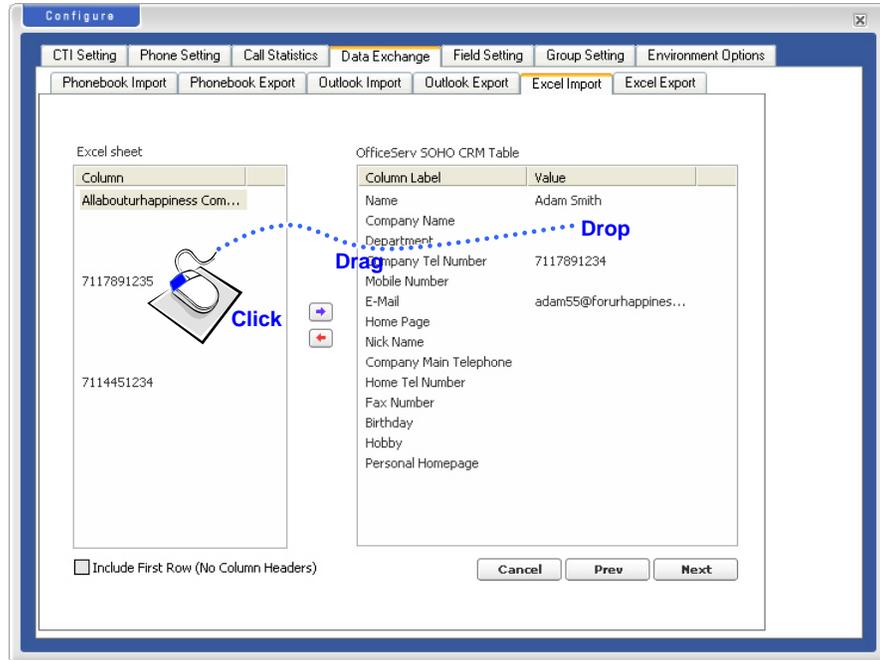
The procedure to import the phonebook data of Microsoft Excel file format to OS SOHO CRM is as follows:

1. Select [Phonebook Import] tab on the [External Phonebook] tab window, and the following window will appear.

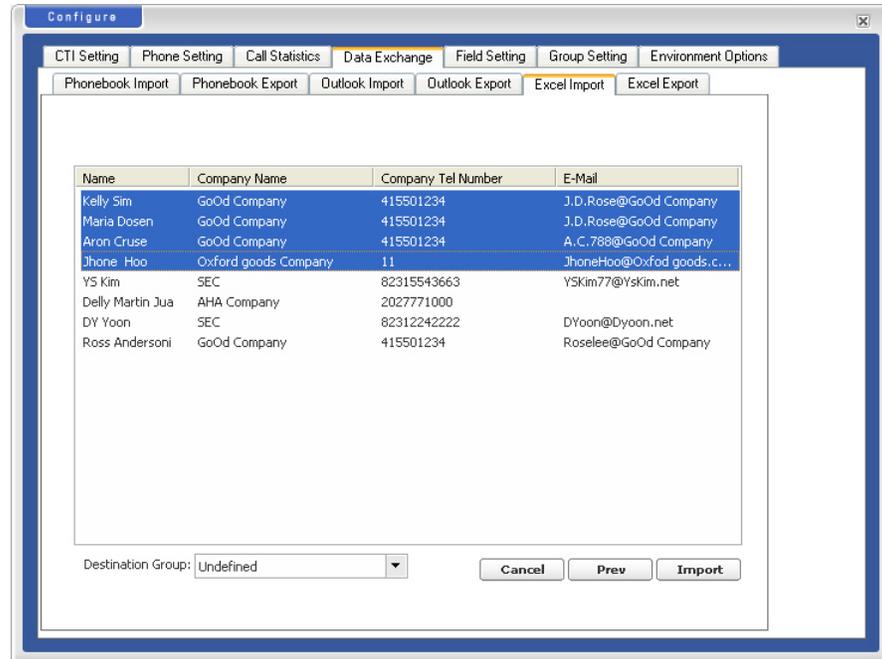


2. Select a desired phonebook data file of Microsoft Excel file format and click the [Next] button.

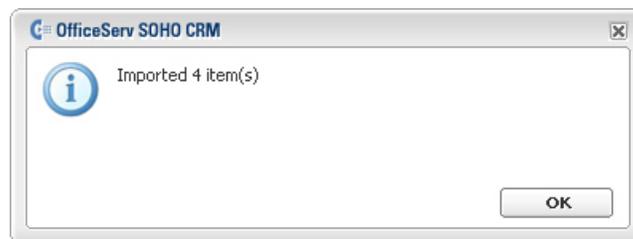
3. Perform mapping between the customer information field in the phonebook of Microsoft Excel file format and the customer information field in the phonebook of OS SOHO.



4. Phonebook data of Microsoft Excel file format are displayed on the window shown below. Select a desired phonebook data on the window and click the [Import] button.



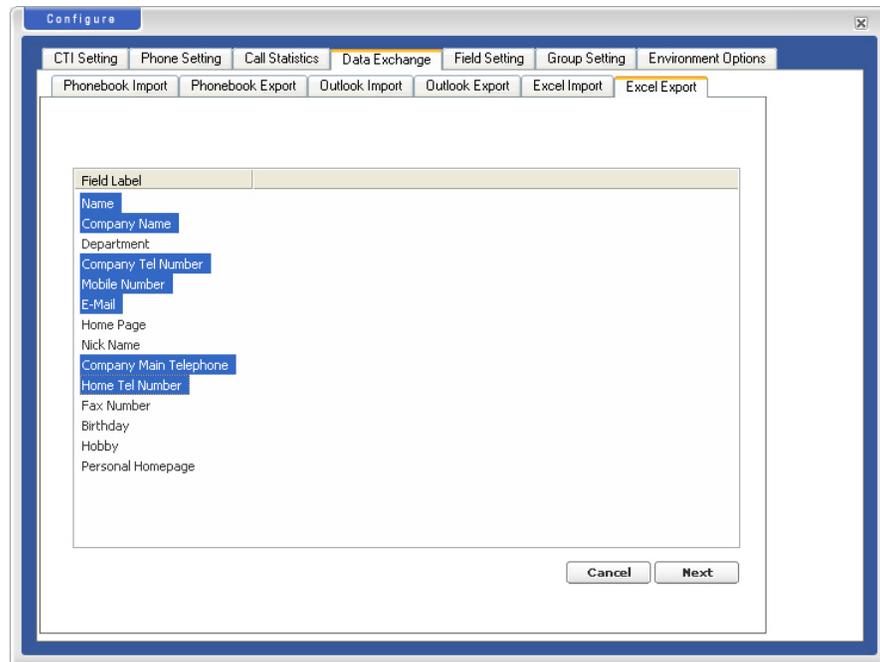
5. A message to tell the completion of the import will appear on the window shown below. Click the [OK] button.



Exporting Phonebook data in Microsoft Excel File Format

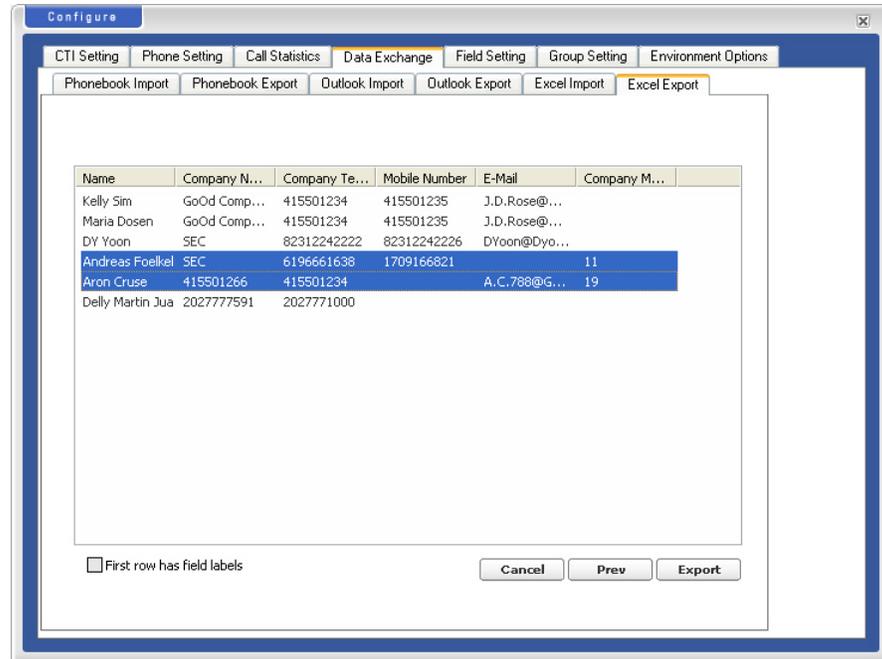
The procedure to export the phonebook data of OS SOHO CRM to Microsoft Excel file format is as follows:

1. Click the [Go] button of the 'Export to Excel Sheel' item on the [External Phonebook] tab window, and the following window will appear.

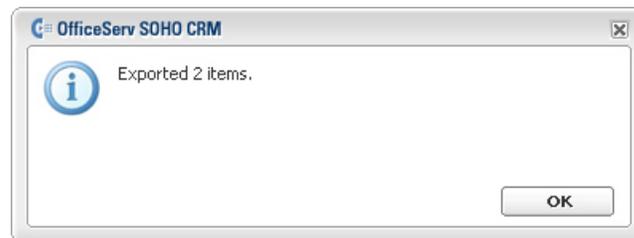


2. Select CRM fields to export and click the [Next] button.

- The selected CRM fields appear as the customer information items of the phonebook and the relevant data items are arranged on the window as shown below.



- Select phonebook data to export as Microsoft Excel file formats and click the [Export] button.
- Select the location to save the Excel files, enter the file name and click the [Save] button.
- The <Message> window to tell the completion of the phonebook data export will appear. Clcik the [OK] button.



Searching Phonebook

There are two ways to search the phonebook for the customer information registered in OS SOHO CRM: Easy Search and Advanced Search.

Easy Search

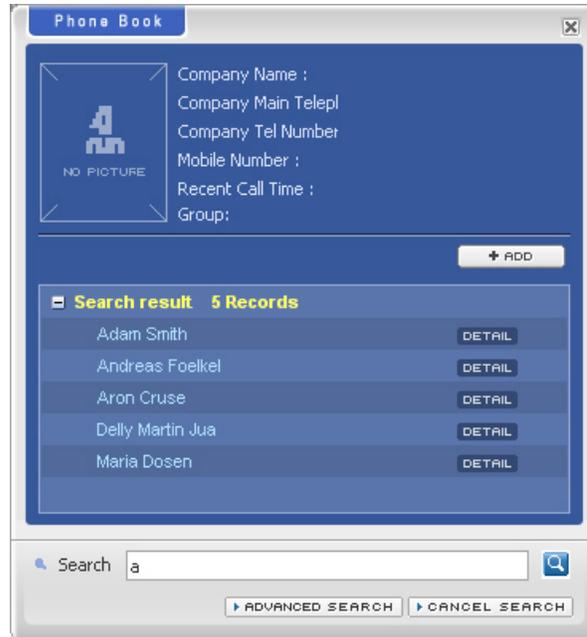
Searches phone numbers by name. The procedure for the Easy Search is as follows:

1. Click the [Phonebook] menu icon(☎) from the <Toolbar> menu window to display the <Phone Book> menu window as shown below.



2. Enter a desired a name in the Value field.

3. Click the [search] icon(🔍) on the right side of the Value field to the search result. If a customer information that satisfies the search condition is found, the search result is displayed in the group list field.



4. Click the searched need to display the brief customer information.



5. Double click the searched name or phone number displayed in the search result field, and the following <Customer Information> window will appear as shown below.

The screenshot shows a 'Customer information' window with the following data:

Name:	Andreas Foelkel
Company Name :	SEC
Department :	Sales Support Engineer
Company Tel Number	6196661638
Mobile Number :	1709166821
Recent Call Time :	2005-07-11 오전 10:14:54
Group:	Office

Buttons: DEL, OPEN

Detail Information

Personal

Company Name	SEC
Department	Sales Support Engineer
Company Tel Number	6196661638
Mobile Number	1709166821
E-Mail	Andreas000@sec.sec.com
Home Page	
Nick Name	Andrea

Telephones

Miscellaneous

UPDATE

Call Log

11	7월 08, 17:57:38	0:0:30'
11	7월 08, 17:56:05	0:0:2'
11	7월 08, 16:40:26	0:0:3'
11	7월 08, 16:38:55	0:0:6'
11	7월 08, 15:57:23	0:0:46'

REFRESH

6. To edit the registered customer information, edit the relevant contents in the above window.
7. To change the registered photo image on the window, Click the [OPEN] button and select a desired photo image.

8. After editing the customer information, click the [UPDATE] button.

 NOTE

Deleting Photos
Click the [DEL] button to delete the photo.

Deleting Customer Information
Select and right-click the customer information to delete in the search results field and select [Delete Item] to delete the customer information.

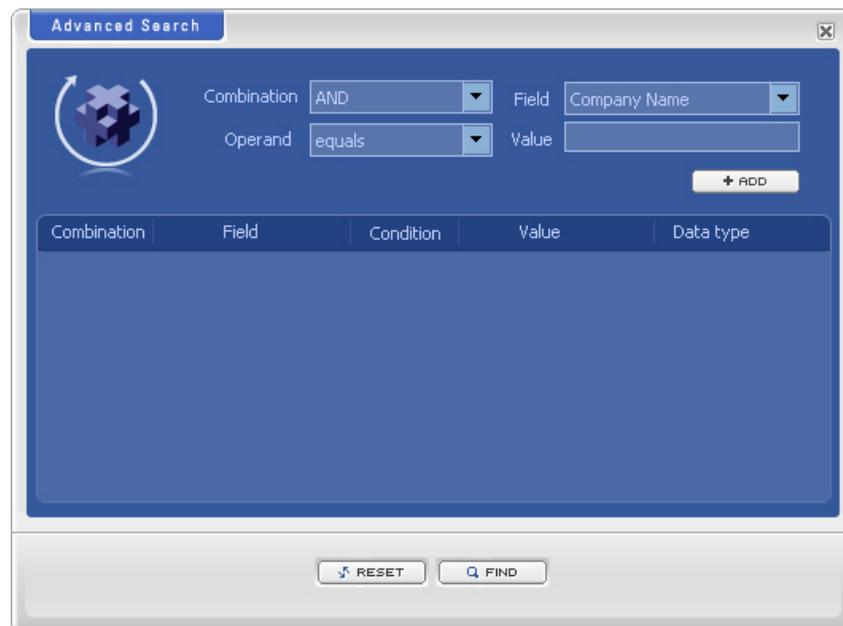
Making calls
Click the [] button next to the phone number in the <Customer Information> window.

Sending Messages
Right-click the search results and select [Send SMS] to send a message to the recipient.

Advanced Search

Searches phone numbers by means of various detailed conditions. It provides a function that searches the relevant phone number by conditioning or specifying values in more than one customer information fields. The procedure for the Advanced Search is as follows:

1. Click the [ADVANCED SEARCH] button on the <phonebook> menu window to display the <Advanced Search> window as shown below.



2. The combination conditions that are “AND” and “OR” can be available to search by combining various conditions.



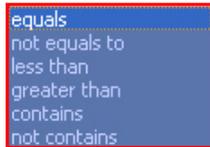
AND
OR

3. Select the customer information items to search in the customer information field.



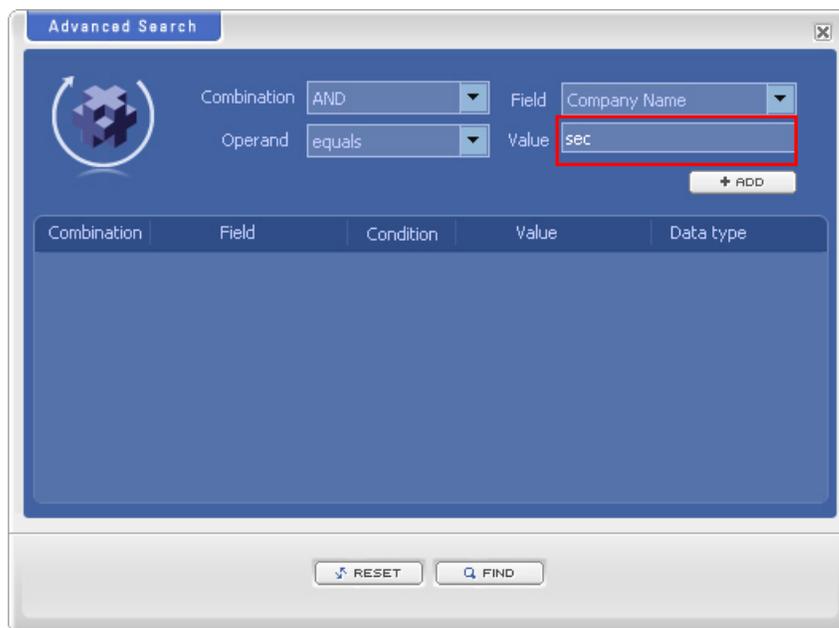
Company Name
Department
Company Tel Number
Mobile Number
E-Mail
Home Page
Nick Name
Company Main Telephone
Home Tel Number
Fax Number

4. Select the search conditions in the Operand items. Search conditions such as equals, differs, greater than, less than contains and not contains are available.

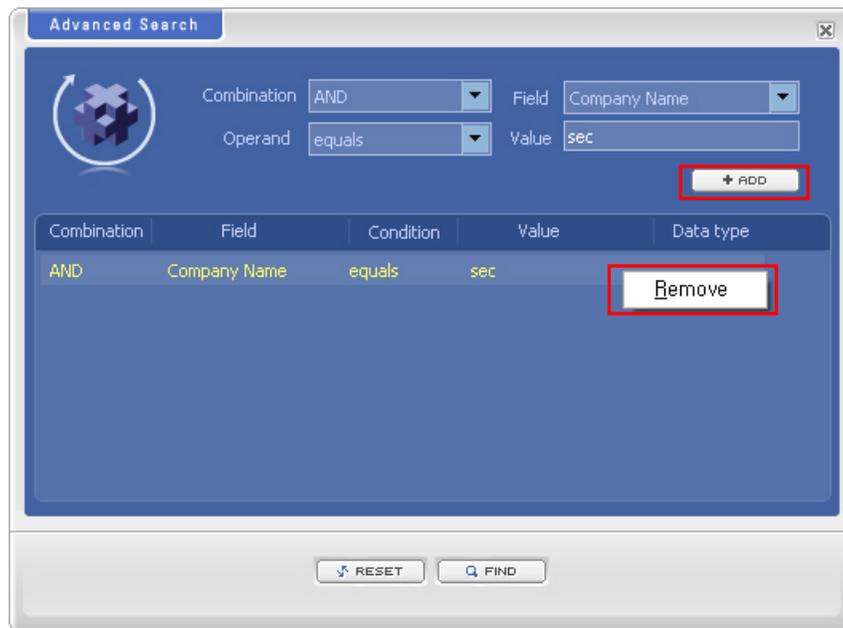


equals
not equals to
less than
greater than
contains
not contains

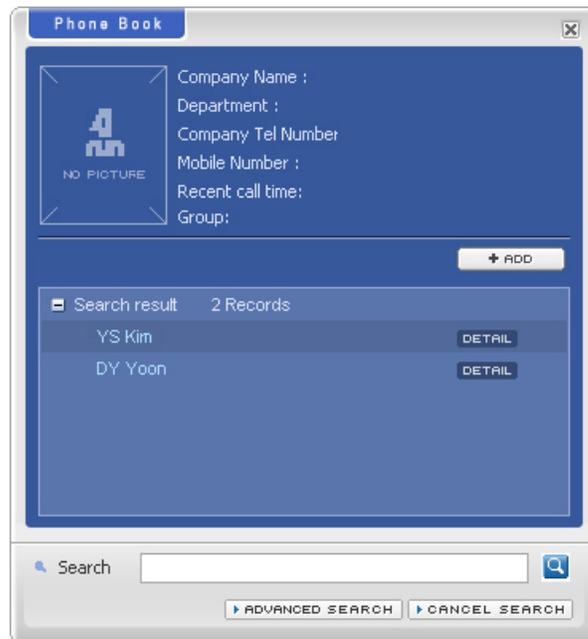
5. Enter the value to search in the entry field.
Strings or values can be available to search.



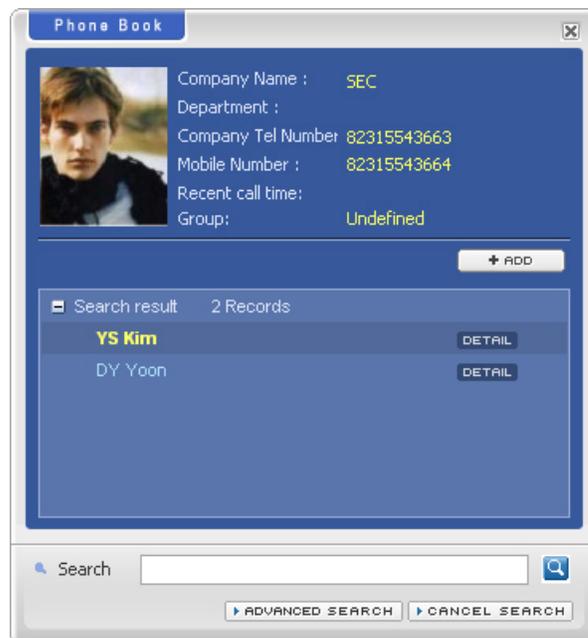
6. Click the [ADD] button to add a condition.
 - To remove the condition, click the right mouse button in the condition list field. Select the [Remove] menu in the popup menu.



7. After specifying conditions, click the [FIND] button. The search icon shows the progress status while searching.
8. When the search is completed, the searched name is displayed in the <Phone Book> menu window.



9. Click the searched name displayed in the search result field to show the brief customer information.



10. Double click the searched name displayed in the search result or click the [Detail] button to pop up the <Customer Information> window.



CHAPTER 5. Call Control

This chapter describes the functions to make calls of various types through the OS SOHO CRM program.

Call Control

The function to control the OS SOHO by using the [Call Control] menu of the OS SOHO CRM program is as follows:

Category	Station	C.O.Line
Dialing	- Making Intercom Calls - Making calls by using the station buttons	Making external calls
Answering Calls	Answering intercom calls	- Answering external calls - Forwarding calls
	Call pickup	
Functions on Busy	Holding intercom calls	Holding external calls
	Conference call	



NOTE

Call Control by Using OS SOHO CRM

Only the call control functions for the OS SOHO are enabled by using the call control menu of OS SOHO CRM when CTI operates. To make a call, OS SOHO should be used. For detailed method of making a call by using the OS SOHO, refer to 'OS SOHO User's Guide'.

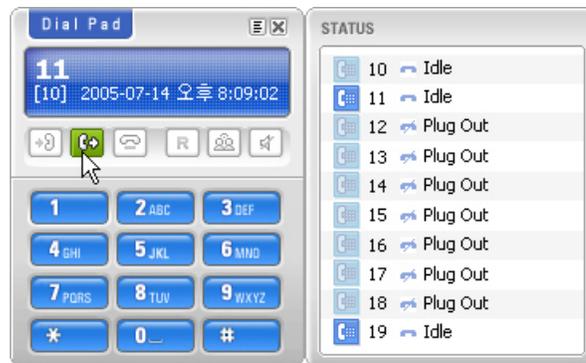
Making Calls

Making Intercom Calls

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

Making Intercom Calls by Using the Dial Button

1. Enter the target station number by using the dial button in the <Call Control> menu window in the waiting status, and then click the [] button.



2. If the target answers the call, speak to the target through the speakphone in the OS SOHO or the receiver.
3. Click the [] button.



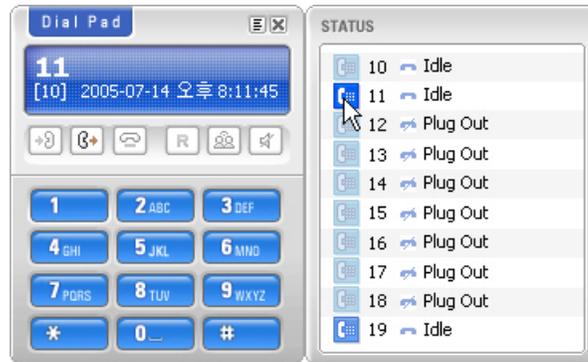
NOTE

Deleting Entered Phone Number

Press [←] to delete a letter of the entered phone number at a time. Press [Esc] to delete the whole number at a time or to delete after a call is end.

Making Calls by Using the Station Buttons

1. Click the target station number button in the <Call Control> menu window in a waiting status.

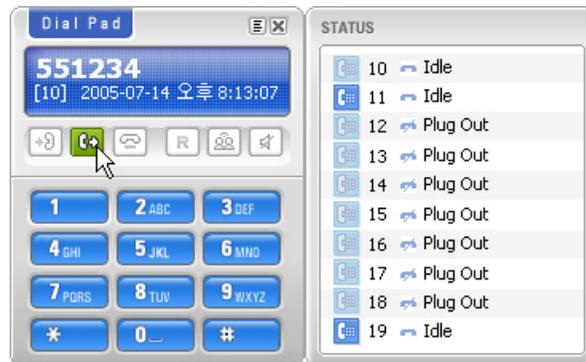


2. If the target answers the call, speak to the target through the speakphone in the OS SOHO or the receiver.
3. Click the [] button to hang up the phone.

Making External Calls

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

1. Enter the target station number button by using the <Call Control> menu window in a waiting status, and then click [] button.



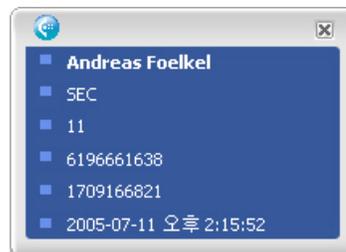
2. If the target answers the call, speak to the target through the speakphone in the OS SOHO or the receiver.
3. Click the [] button to hang up the phone.

Answering Calls

Answering Intercom Calls

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

1. If a call is received, OS SOHO rings, and the <Calling Notification> window comes up on the bottom of the Windows desktop and the brief <Customer Information> window comes up on the top of the Windows desktop.



2. If clicking the <Calling Notification> window or the [Answer] icon() on the brief <Customer Information> window, the user can have a conversation with the called party.



NOTE

Answering a Call by Using OS SOHO CRM

Upon answering a call by using OS SOHO CRM, the user can answer the call by using the speaker phone of OS SOHO. Answer the call by using the speaker phone or through the receiver. Hang up the receiver when having a conversation through the receiver.

Brief customer information window popup when incoming/outgoing

You can allow the brief customer information window to appear when incoming and outgoing. For detailed information about setting this option, refer to 'Chapter 3. Menu Description' -> 'Configure' -> 'Additional Setting'.

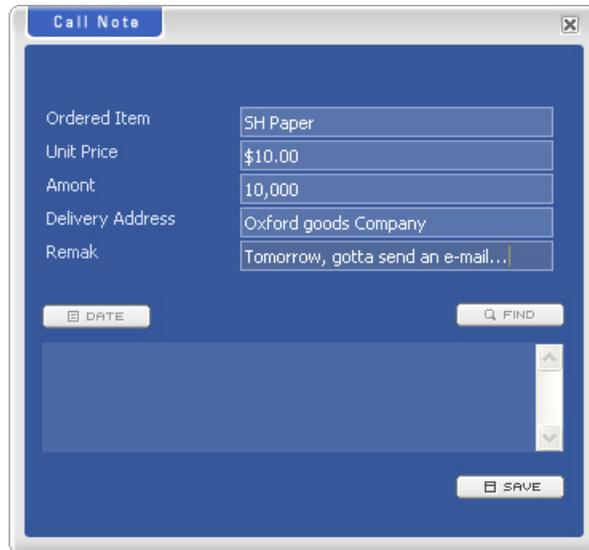
Answering External Calls

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

1. If a call is received, OS SOHO rings, and the <Calling Notification> window and the brief <Customer Information> window comes up on Windows desktop.



2. If clicking the <Calling Notification> window or or the [Answer] icon() on the brief <Customer Information> window ,and the user can have a conversation with the called party.
3. It is available to enter calling details on busy by clicking the [EDIT CALL NOTE] button in the brief <Customer Information> window.
4. Click the [SAVE] button after writing out <Call Note> to save the note.



Ordered Item	SH Paper
Unit Price	\$10.00
Amount	10,000
Delivery Address	Oxford goods Company
Remark	Tomorrow, gotta send an e-mail...

DATE FIND SAVE



NOTE

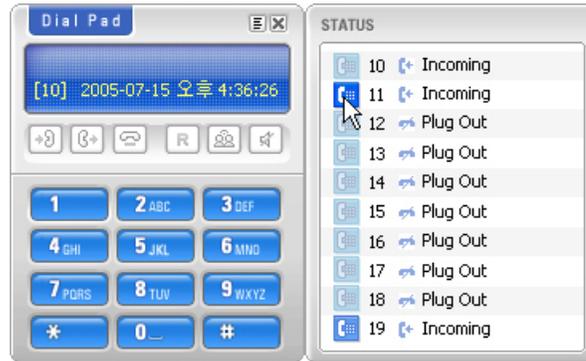
Checking or Modifying Calling Note

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 that is connected to another phone:

1. If a phone in the next seat rings, it is indicated in the station status button.



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

Functions Available While Calling

Recall

Follow the steps below to have the counterpart wait for some time and then resume a conversation when an urgent business happens or another call is connected while calling:

1. Click the [] button from the <Call Control> menu window to have a call on hold while calling.
2. The counterpart stays in the hold status and hears a hold tone.
3. Click the [] button to resume the conversation.

Conference Call

The conference call is available up to 3 people(in a station or on a C.O. line) including the concerned party at once. Follow the steps below:

1. Click the [] button from the <Call Control> menu window to make a conference call while calling.
2. Enter the target numbers, and then click the [] button.
3. If the counterpart answers the call, click the [] button again to make a conference call.

CHAPTER 6. Outlook Add-On

This chapter describes how to use Outlook Add-On.

Outlook Add-On Toolbar

If users install OS SOHO CRM in user's PC, the Outlook Add-On is automatically added to the tool box of the Microsoft Outlook.

After Completing installation, On executing the Microsoft Outlook program, the window shown below appears : Users can check the Outlook Add-On from the Microsoft Outlook window.



Users can make a call or send messages on the Microsoft Outlook, using the Outlook Add-On toolbar.

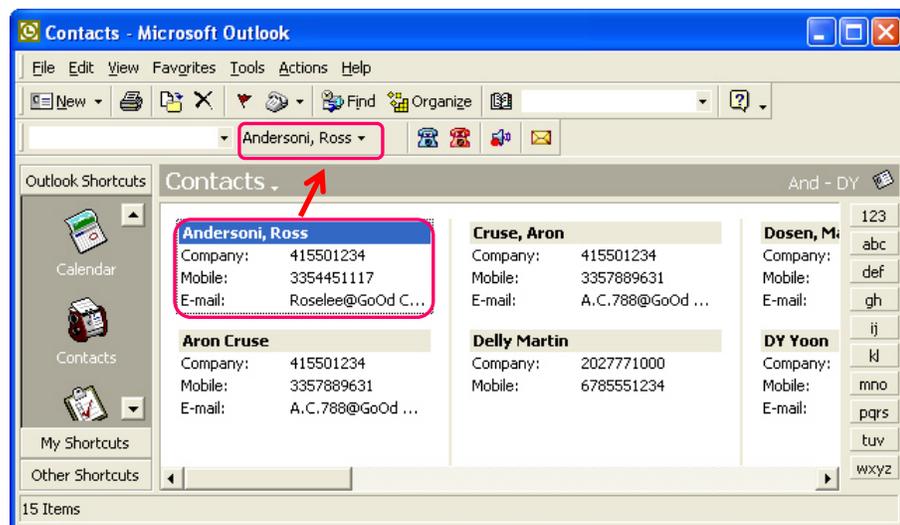
The buttons of the Outlook Add-on are described below.

Buttons	Description
	Makes a call.
	Disconnects the current call.
	Mute
	Short Message Service

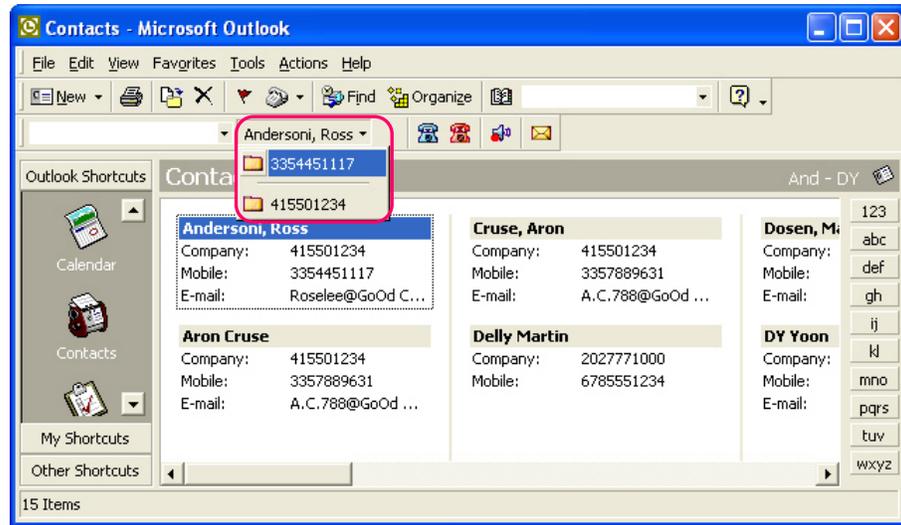
Make a call

Follow the steps below to make calls by using Outlook Add-On:

1. On executing the OS SOHO CRM, start the Microsoft Outlook program.
2. Select the <Contacts> menu.
3. Click the target contact in the <Contacts> menu window.



4. Click the target name [▼], and then the phone number list of the target contact will appear as shown below.



5. Select the target phone number from the list and click the Dialout (📞) button to make a call.
 - Click the Phone number box, and then outgoing list will be appear as shown below. Select the target phone number from the list and click the Dialout (📞) button.



- Users can enter the target phone number by using keyboard. After entering the phone number, click the Dialout (📞) button to make a call.



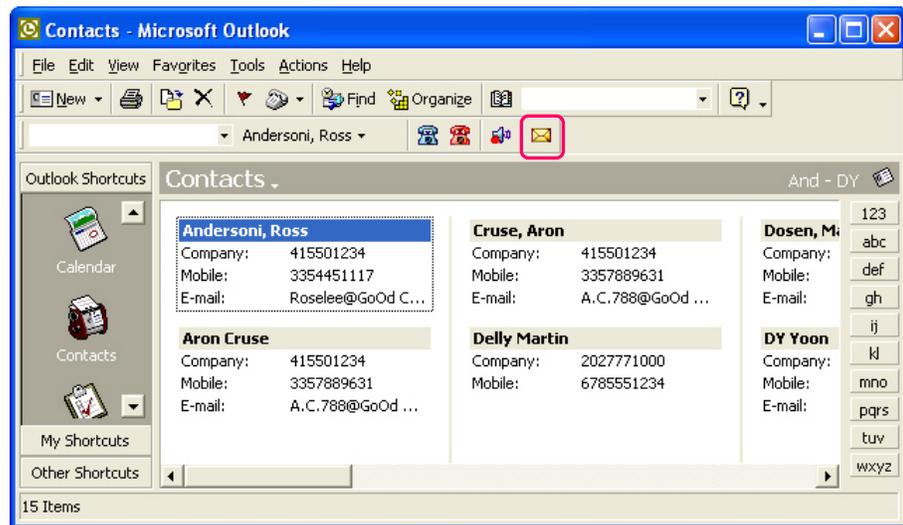
- Users can make a call by using the [Enter] key of the keyboard instead of using the Dialout (📞) button.

6. If the target answers the call, speak to the target through the speakphone in the OS SOHO or the receiver.
7. Click the Disconnect () button to hang up the phone.

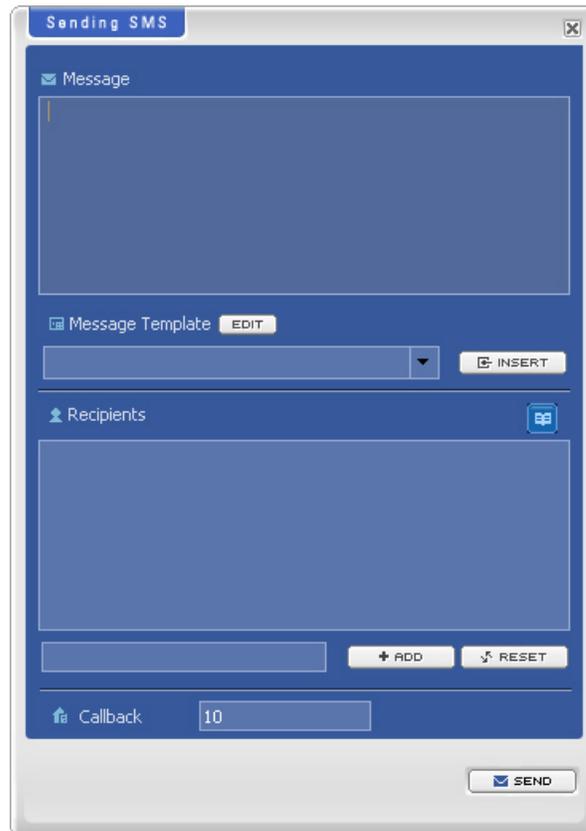
Short Message Service

Follow the steps below to send messages by using Outlook Add-On:

1. On executing the OS SOHO CRM, start the Microsoft Outlook program.
2. Click the SMS() button in the Outlook Add-On toolbar,



and then the <Sending SMS> menu will appear as shown below.



3. Enter the message to the message text field and add the recipients and enter the callback number. Click the [SEND] button.



NOTE

Sending Short Message from the Phonebook Menu Window

For detailed procedure on sending short message, refer to 'Chapter 3. Menu Description' -> '[Short Message Service] menu'.



ANNEX A. ABBREVIATION

C

CID	Caller Identification
CPU	Central Processing Unit
CRM	Customer Relationship Management

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 Digital Convergence

W

WAN Wide Area Network

WIP Wireless IP-Phone

OfficeServ SOHO
CRM User Guide

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