

## Connecting Legrand CRM to your phone system

### Overview

Legrand CRM PRO and CORP editions support the **TAPI** interface to respond to incoming phone calls and make outgoing phone calls.

When an incoming call is received, Legrand CRM uses the Caller ID number to scan the database for a phone match in the Company phone field and the Contact phone fields. When a match is found Legrand CRM brings up the appropriate Contact or Company record.

In order for this to work your computer must be able to communicate to your phone system and your phone system must support CallerID.

### What is TAPI?

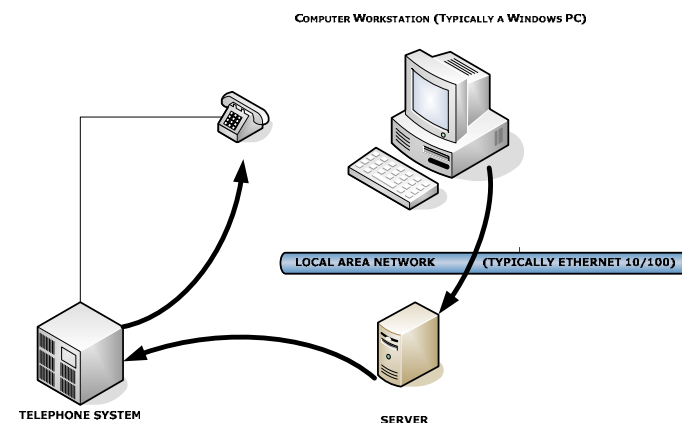
Webopedia.com Definition for **TAPI**:

Short for *Telephony Application Programming Interface*, an API for connecting a PC running Windows to telephone services. TAPI was introduced in 1993 as the result of joint development by Microsoft and Intel. The standard supports connections by individual computers as well as LAN connections serving many computers.

TAPI typically falls into 2 distinct categories: 1<sup>st</sup> party TAPI and 3<sup>rd</sup> party TAPI.

### 3<sup>rd</sup> Party TAPI

In a 3<sup>rd</sup> Party TAPI application your computer and your telephone communicate *indirectly* with the assistance of a 3<sup>rd</sup> party server acting as a go-between (hence 3<sup>rd</sup> party).



3<sup>rd</sup> Party TAPI

## 1<sup>st</sup> Party TAPI

In a 1<sup>st</sup> party TAPI application your computer communicates with your telephone directly.

In the case of a computer modem connected to an outside phone line, the direct physical connection between the computer and the modem is obvious.

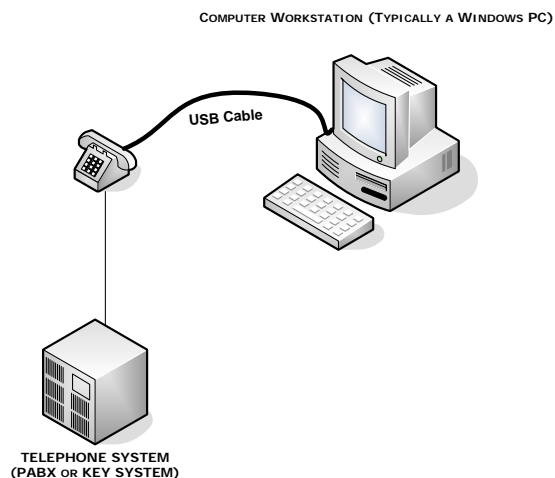
If your business uses a central telephone system (such as a PABX or a smaller 'Key System') it is not a matter of connecting your phone handset's extension line to your computer modem – this will not work. Rather, you must obtain a TAPI interface kit from your phone supplier to connect your phone handset to your computer.

Phone systems vary greatly from manufacturer to manufacturer, however the following examples illustrate the two most common mechanisms for 1<sup>st</sup> party TAPI employed by phone system manufacturers today.

### Example 1

Your Phone System Manufacturer uses a USB connection between your computer and your phone. In this example the manufacturer has provided 3 elements to help you create a 1<sup>st</sup> party TAPI CTI interface with your computer.

1. A physical USB connection on the phone (or handset) which can be connected to your computer using a standard USB cable –check with the dealer that installed your telephone system to see if your system's handsets have USB capability.
2. A set of basic USB drivers that tell the PC about the USB connection to the phone. This is not the TAPI driver.
3. A 1<sup>st</sup> party TAPI driver compatible with Microsoft TAPI 2.0 or higher that utilises the USB connection to your handset.



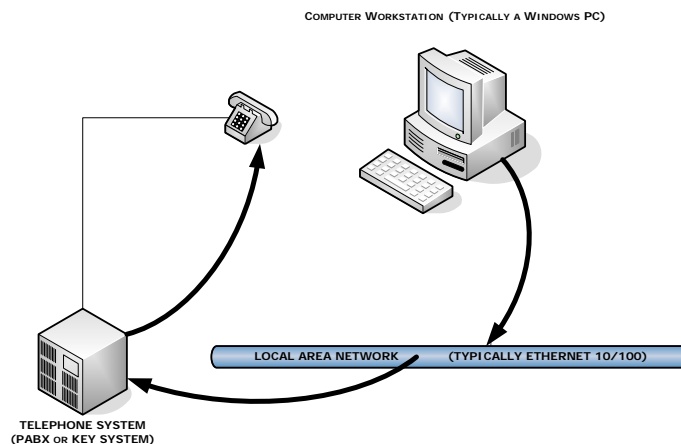
Next are the steps commonly taken to create this TAPI connection via USB. You should carefully read your manufacturer's instructions on 1<sup>st</sup> party TAPI drivers and/or USB connections before attempting to make the connection.

1. Ensure you have the correct handset type, USB drivers for your Windows operating system and the 1<sup>st</sup> party TAPI driver from the manufacturer of your telephone system.
2. Physically install the USB adapter into the phone, or if integrated, then connect the USB cable to your PC. Supply the USB drivers in the normal manner of loading a Windows PC with software drivers.
3. Install the 1<sup>st</sup> party CTI driver software, indicating your telephone extension number if requested during or after the installation. Restart your PC.
4. After restart check the advanced section of the Phone and Modem Options (in Windows XP in this example) and see that your telephone system manufacturer's TAPI driver (or simply your extension) is listed, and that it has the correct extension configured when you select it and click Configure.

## Example 2

Your Phone System Manufacturer uses a LAN connection between your computer and your phone system which in turn controls only your phone. In this example the manufacturer has provided only 2 necessary elements to help you create a 1<sup>st</sup> party TAPI CTI interface with your computer.

1. A piece of software usually referred to as a LAN CTI driver for installing the TAPI driver and providing the mechanism to communicate with your phone system over the local area network.
2. A programming mechanism to allow the phone system to control which computers or users are allowed to control which phones by 1<sup>st</sup> party CTI. This is usually a collection of setting in the manufacturer-supplied management console for the telephone system.



Next are the steps commonly taken to create this TAPI connection via the LAN. You should carefully read your manufacturer's instructions on 1<sup>st</sup> party TAPI drivers and/or LAN connections before attempting to make the connection.

1. Ensure you have the correct handset type and the LAN CTI software for your Windows operating system.

2. Have the dealer (or staff member) that maintains your phone system to create an association between your computer and your telephone extension. Many manufacturers do this by allocating an extension to an IP address.
3. Install the 1<sup>st</sup> party LAN CTI software. You are usually not required to configure your telephone extension number because this configuration has been achieved already
4. After restart check the advanced section of the Phone and Modem Options (in Windows XP in this example) and see that your telephone system manufacturer's TAPI driver (or simply your extension) is listed, and that it has the correct extension configured when you select it and click Configure.

Always refer to your manufacturer's instructions with regard to installing software and making changes to a telephone system's programming. A telephone system is usually a very complex thing indeed and changes should really be done by trained personnel only.

### Configuring Legrand to use TAPI

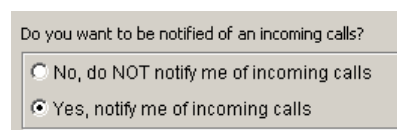
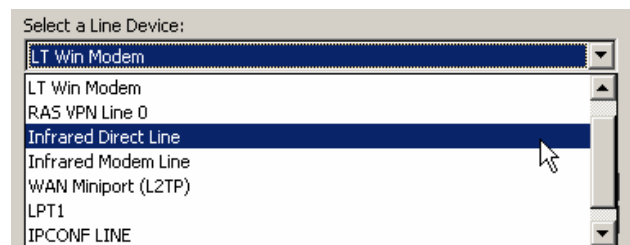
Once your phone handset is connected to your computer you need to configure Legrand CRM so that it knows which TAPI service to use.

Go to the main menu at the top of the screen and select "Administration > User Options", then click on the button "Telephone Device".

In the "Line Device" drop-down selection list you should see the TAPI driver that was loaded on your computer during the installation of the TAPI software drivers from your phone system supplier.

After you have selected the correct TAPI driver all that is left to do is to tell Legrand CRM whether it should monitor the phone line and notify you of incoming phone calls.

If you don't want the system to notify you of incoming phone calls you can still use the phone connection to dial numbers for outgoing phone calls.



Please note that Caller ID will work when both the phone lines and phone system support Caller ID.

Also note that if your computer uses a modem which is connected directly to an outside line you will also need to check whether the modem itself supports caller ID. Some modems do not, in which case the incoming number cannot be transmitted to Legrand CRM. Checking the modem specifications at the manufacturer's website will allow you to identify if your particular model of modem supports caller ID.