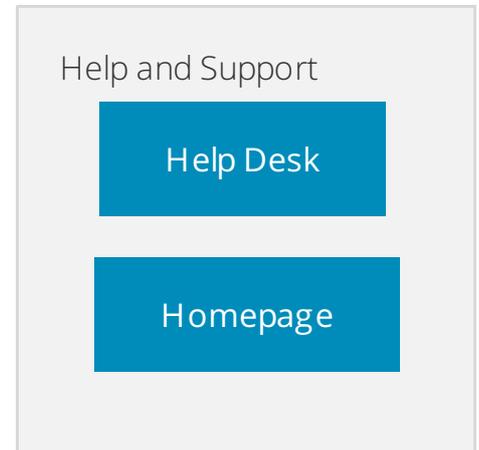# CRM Plugins

3CXPhone for Windows, which comes bundled with 3CX Phone System 12.5. This article demonstrates how to integrate Outlook using 3CXPhone for Windows, how to launch calls, what in-bound call pop-ups are and how to view all calls via Outlook's journal. Integrating 3CX with Outlook provides the following features:

- Click-To-Call - To call a customer within Outlook, simply click on the customer contact. There's no need to input the customer's number into your phone, which saves you and your employees time.
- Call Pop-ups - In-bound calls will pop-up on your screen, letting you know which customer is calling. This saves your company time, as your customer's details are instantly brought up on the screen. If you do not have the customer's details stored within Outlook, you can create a new contact record.
- Call Journals - All in-bound, out-bound and missed calls are stored in the customer's contact journal, allowing you to track the calls that were made to that customer.
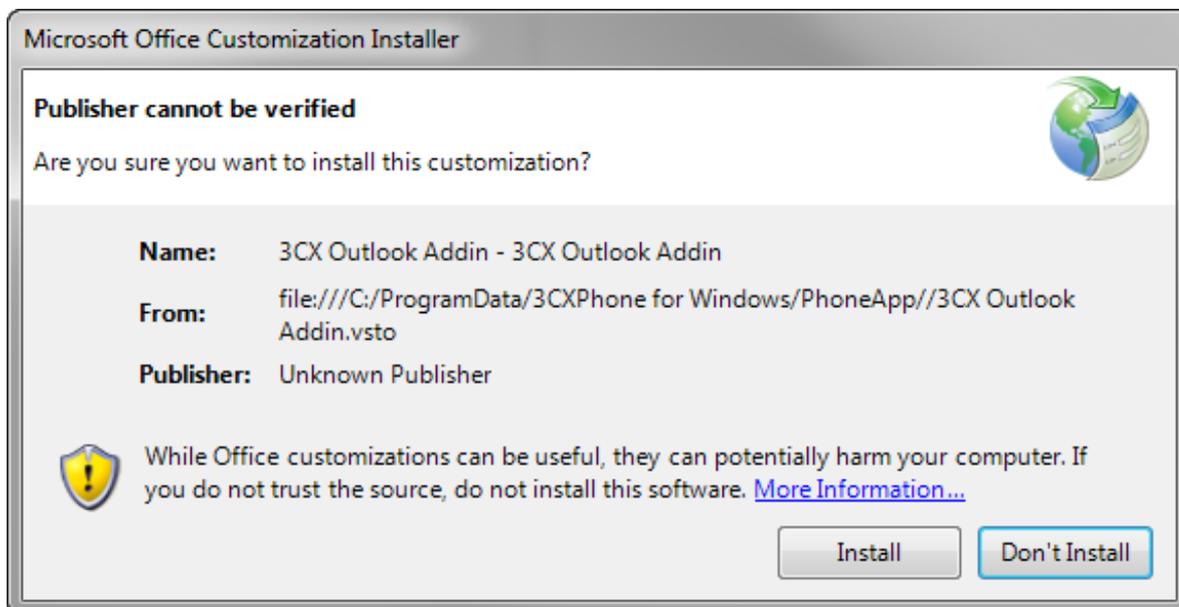
3CX Plugins.
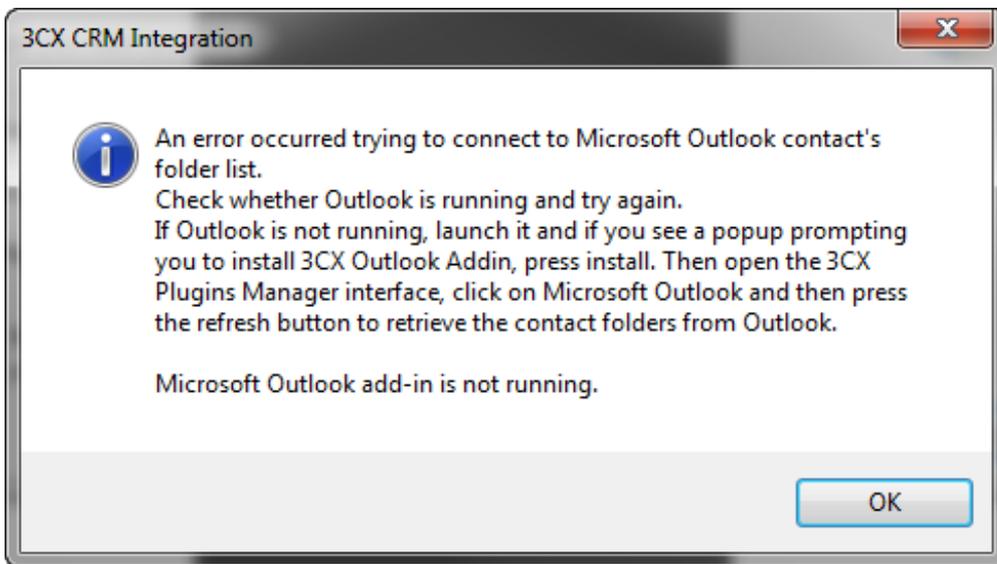- Make sure you don't have Microsoft Outlook open.

- Start the 3CX Plugins setup, select "Microsoft Outlook + TAPI Driver" and follow the instructions to complete the installation.
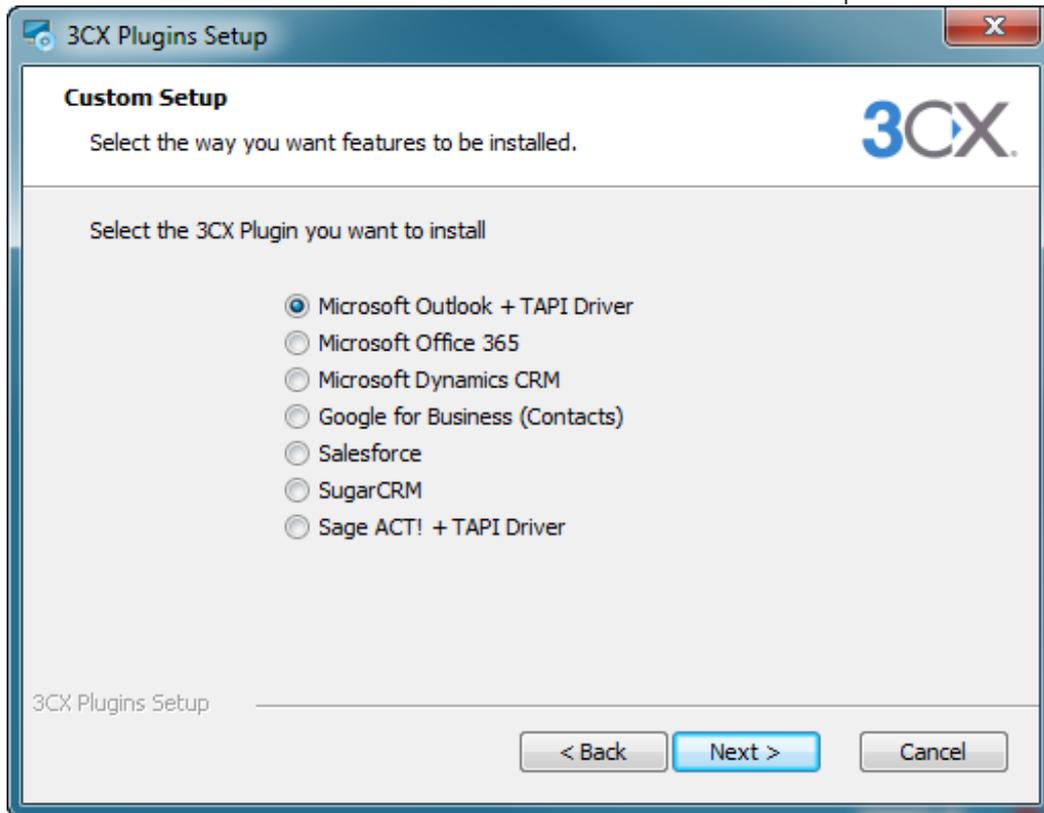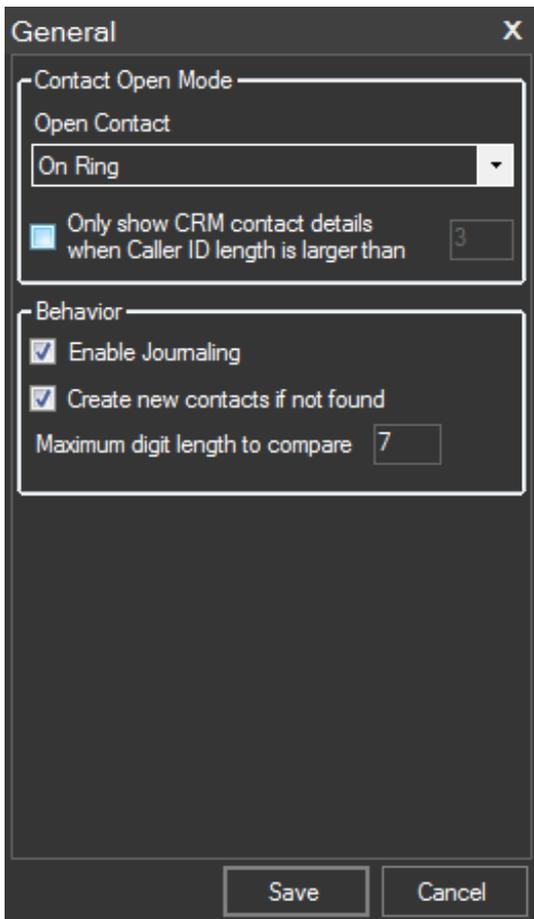

1. Start Outlook. When you start Outlook for the first time after installing the plug-in, you will be prompted to install the Outlook add-in. Press Install.

1. Start the 3CX Plugins Manager tool to configure your plug-in. If the add-in was not installed yet, you will see an error message like this:

3CX CRM Integration ✕

(i) An error occurred trying to connect to Microsoft Outlook contact's folder list.
Check whether Outlook is running and try again.
If Outlook is not running, launch it and if you see a popup prompting you to install 3CX Outlook Addin, press install. Then open the 3CX Plugins Manager interface, click on Microsoft Outlook and then press the refresh button to retrieve the contact folders from Outlook.

Microsoft Outlook add-in is not running.

OK

1. Click on "General" to open the general settings page. Here you can configure when you want to open the contact record in Microsoft Outlook (on ring, on answer, or don't open it), and if you only want to open the contact record if the Caller ID length is larger than a number of digits (so it's not launched when another extension is calling you).

General ✕

┌─ Contact Open Mode ─
Open Contact

On Ring ▾

☐ Only show CRM contact details when Caller ID length is larger than [3]

┌─ Behavior ─
☑ Enable Journaling
☑ Create new contacts if not found
Maximum digit length to compare [7]

Save   Cancel

If you also want to automatically register the call activity in the contact's journal, you must check the "Enable Journaling" option. When this option is set, the plugin will add a new journal entry containing information about the call, after the call has ended. If you want to create a new contact when the Caller ID is not found, just
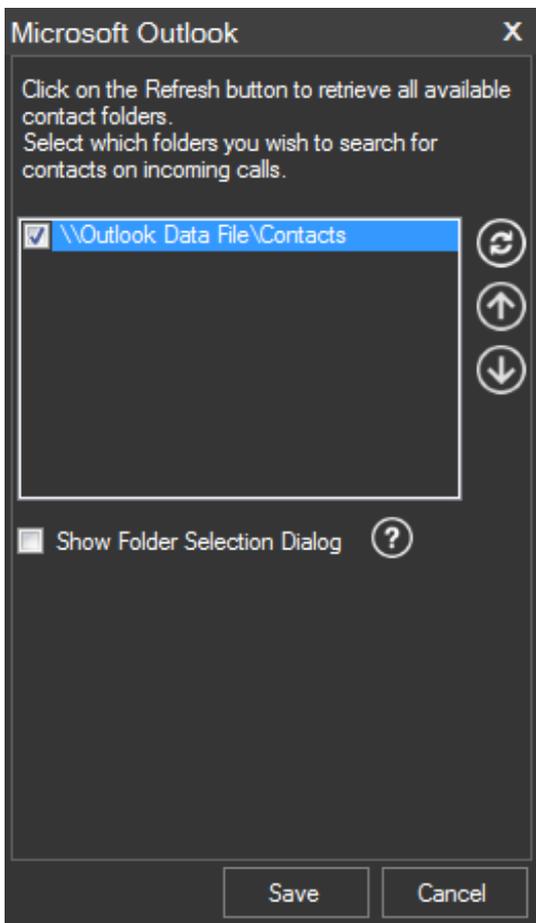
check the option.

In the Behavior section you can also change the maximum digit length to compare. When an inbound call arrives at your extension, the caller ID may have different formats depending on your PSTN or VoIP Provider. It could have an international format (including the country code), national format (including the region or city code), or local format (including only the local number).

Also, you may have created your contact's phone numbers in Outlook with prefixes that are not present in the caller ID, such as mobile phone prefixes. In this case, to match the caller ID with the contact's phone number, you need to specify the maximum digit length to compare parameter. Usually this parameter should be the length of your local phone number.

The Microsoft Outlook plug-in will compare the final number digits of the Caller ID with the final number digits that appear in your contact's phone number. If you configure this parameter to compare a high number of digits, there's a greater chance that the Caller ID will match up with the contact, but it's possible that the Caller ID will not always match up with some contacts. If you configure the maximum digit length to compare to a lower number of digits, you get less accuracy when matching the Caller ID with your contacts.

1. Click on "Microsoft Outlook" to select which personal contact folders or even public folders to use for contact matching. Select as many as you want but take note that the more you select, the slower the caller ID matching will be.

Check the "Show Folder Selection Dialog" to let you choose in which contact folder create the contact when it's not found.
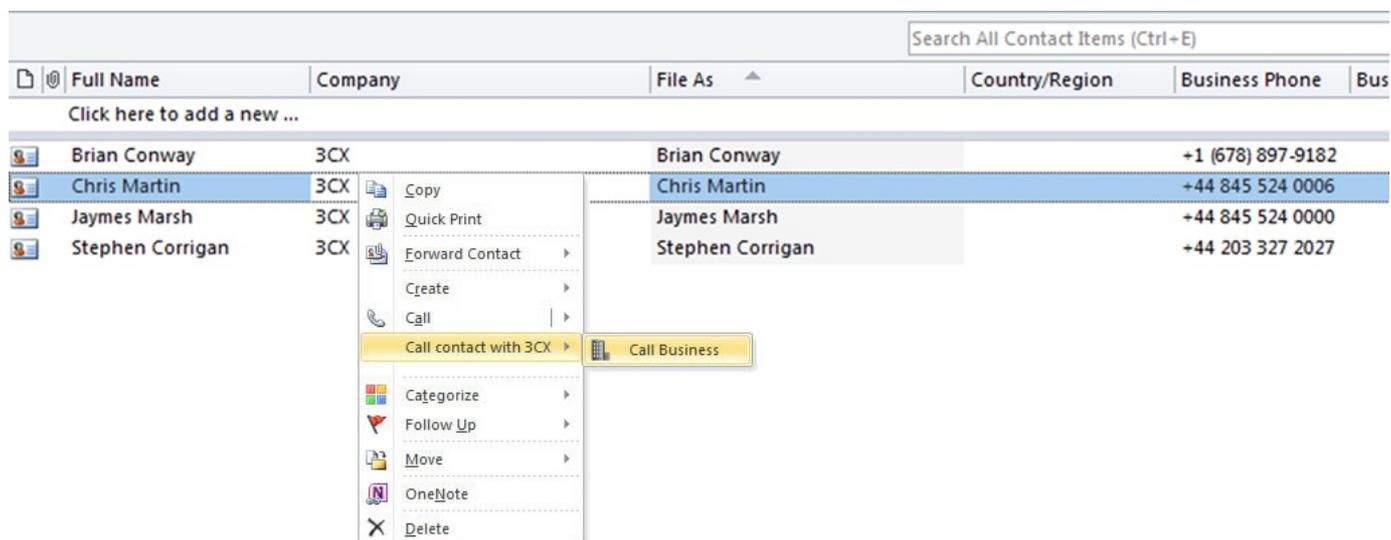
1. Once you have set up your desired options,click Save to complete the configuration. Then start 3CXPhone for Windows.

Launching Calls from Microsoft Outlook

1. Open your contact's section within Outlook.

1. Right click on the contact you want to call and select Call contact with 3CX. The call will be set up directly on your phone.

Inbound Calls

When an inbound call arrives into your extension, the contact record will be shown by Microsoft Outlook. If a contact is not matched and the option "Create new contacts if not found" is checked, a new contact will be created and shown so you update its details.

Track All Calls with Microsoft Outlook's Journal

When the "Enable Journaling" option is checked, all in-bound, out-bound and missed calls will automatically be logged in Outlook's journal and shown in the activities tab for that contact.

Note that this feature is not available in Outlook 2013 because the journal has been deprecated in that version.

Troubleshooting

Outlook add-in not registered when installing from a non-administrator account

When installing the Outlook plug-in from a non-administrator account, the installer may fail to register the add-in in Outlook during installation. In this case the Outlook add-in will be

registered later by the 3CXPhone plug-in for Outlook, for the current user. Administrator credentials are not required for installing the Outlook integration.

The Outlook add-in (which runs into Outlook) is automatically registered by the Outlook plug-in (which runs into 3CXPhone). And in order to run the Outlook plug-in into 3CXPhone, it needs to be registered first in 3CXPhone. This is done using the 3CX Plugins Manager tool. Therefore, in this scenario in order to register the Outlook add-in, you need to complete the following steps:

1) Install the 3CXPlugins module.

2) Run the 3CX Plugins Manager tool. You will see an error about Outlook add-in not running. Ignore that error and press "Save" in order to register the Outlook plug-in in 3CXPhone.

3) Restart 3CXPhone. It will load the Outlook plug-in into 3CXPhone, and register the Outlook add-in.

4) Restart Outlook. You will see the dialog to allow the 3CX add-in. Accept and you're ready to go.

5) Now that the Outlook add-in is running, launch the 3CX Plugins Manager tool again and configure the integration with Outlook.

Outlook Contact Folder not listed in the 3CX Plugins Manager tool

In order to identify which Outlook folder contains contacts, the Outlook add-in needs to iterate all the folders. In most installations this is done very quickly, but in some big installations, and specially when Exchange is involved, this may result in a heavy task, raising the CPU usage and turning Outlook unresponsive. Also, in most cases, the contacts folders are located in the first level of the folder tree, and therefore it makes no sense to look for contact folders deeper. Because of this, the Outlook add-in looks for contacts folders only in the first level by default. But if you have contacts folders in a deeper location, they will not be detected by the Outlook add-in, and as a result they will not be listed in the 3CX Plugins Manager tool.

This behavior can be changed by editing the configuration file "%AppData%\3CX CRM Integration\3CXCRM.ini", and setting the value of the following parameter:

[Microsoft Outlook Add-in]

ContactFolderLookupMaxDeepLevel=1

For example, if you have 2 contact folders:

\\Exchange\FolderA\FolderA1\FolderA11

\\Exchange\FolderB

And ContactFolderLookupMaxDeepLevel=1 (default value if not set), the 3CX Plugins Manager tool will only show:

\\Exchange\FolderB

But if you set ContactFolderLookupMaxDeepLevel=3, both folders will be shown.

You should keep that parameter as small as possible, because larger values will cause a larger iteration, and possibly turn Outlook unresponsive for a while. But if your desired contact folder is not being shown, you can increase the value of this parameter to solve the issue.