



Support Center

CRM Integration — Last update: 1 June 2023

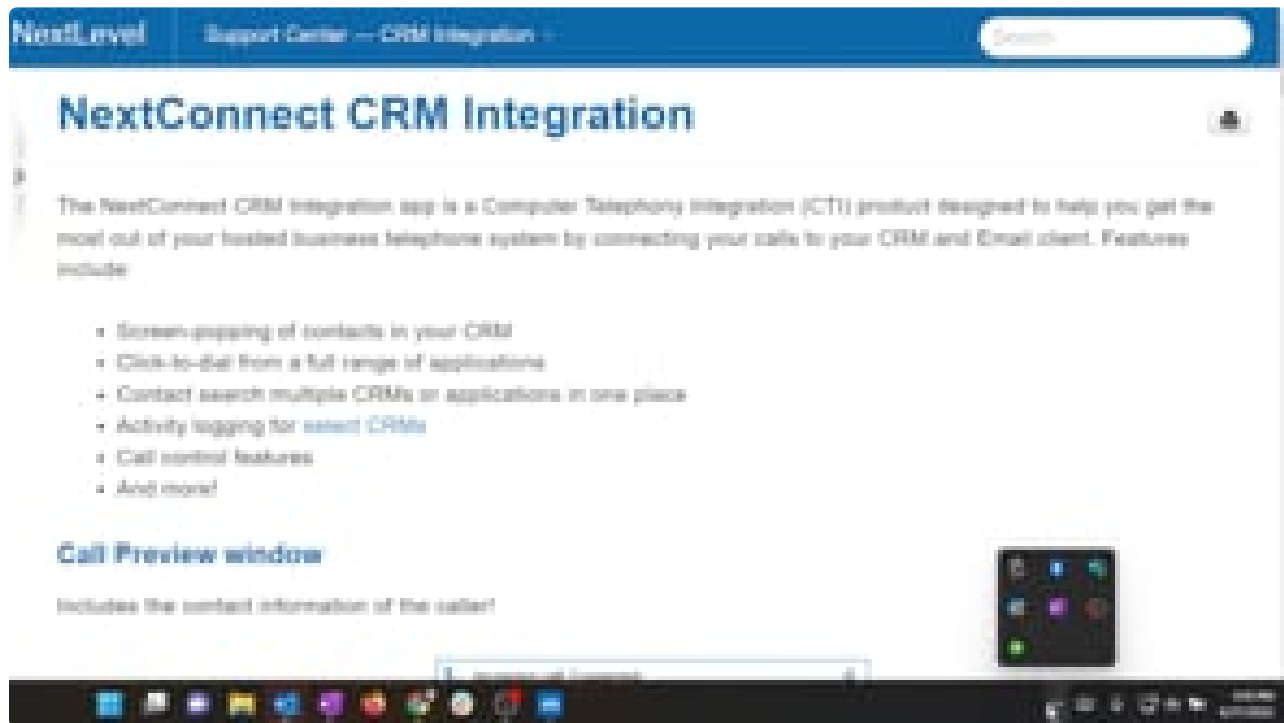
Verve

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1. NextConnect CRM Integration

The NextConnect CRM Integration app is a Computer Telephony Integration (CTI) product designed to help you get the most out of your hosted business telephone system by connecting your calls to your CRM and Email client.



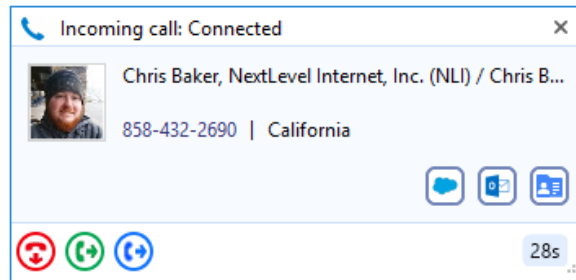
<https://player.vimeo.com/video/721612510>

Features include:

- Screen-popping of contacts in your CRM
- Click-to-dial from a full range of applications
- Contact search multiple CRMs or applications in one place
- Activity logging for [select CRMs](#)
- Call control features
- And more!

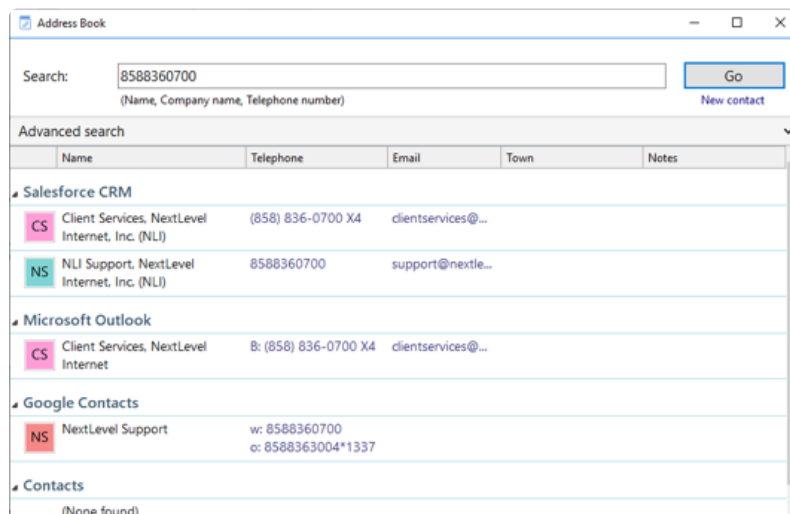
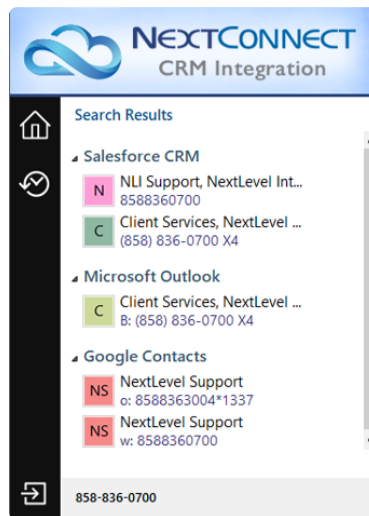
Call Preview window

Includes the contact information of the caller!



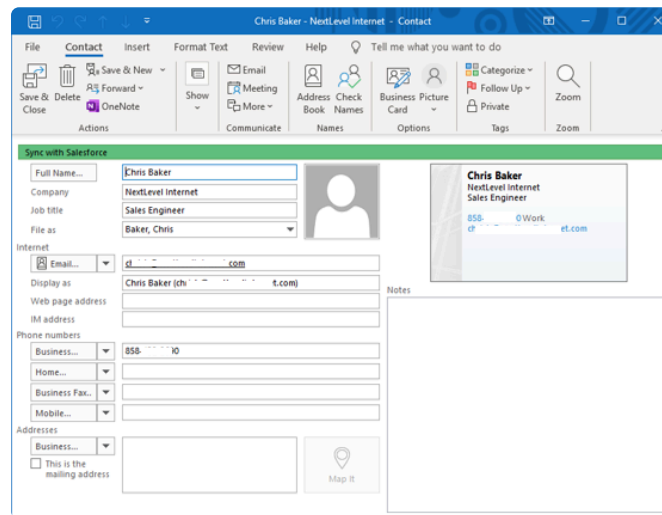
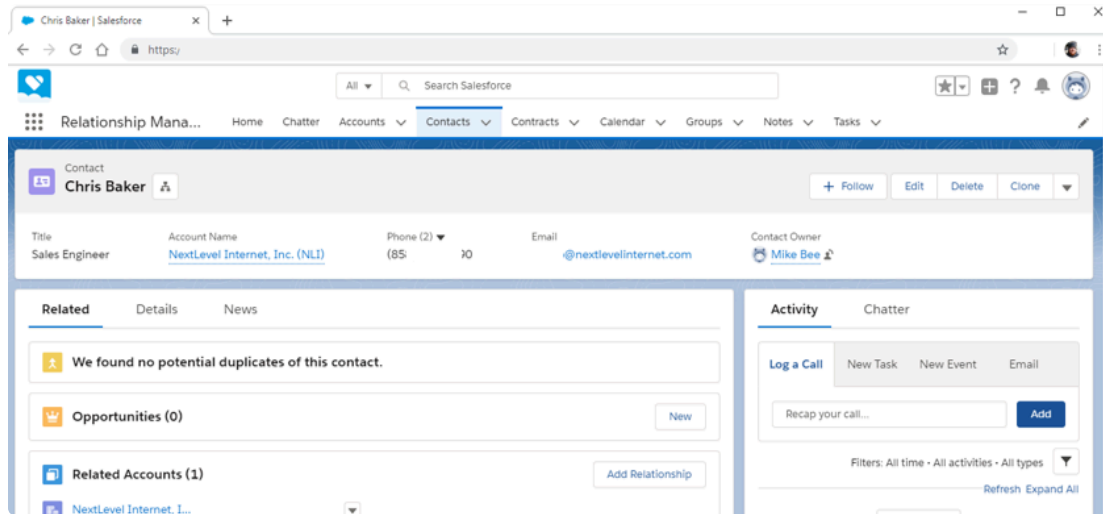
Contact Search across CRMS

Quick search or address book search of all connected services from one source!



Screen-pop directly to your contacts in your CRM

Automatically launch your CRM to the contact's page when they call!



* This page provides an overview of the NextConnect CRM product. For information about setting up the application see [Getting Started](#).

* To have NextConnect CRM Integration added to your account please contact your NextLevel Client Services representative at 858-836-0700 option 4, or ClientServices@nextlevelinternet.com

There are two license types available depending of what level of integration is required.

NextConnect Express

Provides access to all features above while connecting your contact list from Microsoft Outlook, Lotus Notes and Google Contacts.

NextConnect CRM

Provides the features and contact integration above, while also enabling you to connect your contact from one or more supported CRM.

Supported CRM Integrations

CRM Integrations fall into two categories: Standard and Controlled. Standard integrations are included with your NextConnect CRM license at no additional charge. Controlled integrations require an additional one-time setup fee to connect your CRM application to the NextConnect application.

These categories are subject to change. To confirm if your CRM is available for integration please contact NextLevel Client Services.

Standard Integrations





Max-Immo



Controlled Integrations



To learn more or to have the NextConnect CRM Integration app added to your account please contact your NextLevel Client Services representative at 858-836-0700 option 4, or ClientServices@nextlevelinternet.com

If you already have access to the NextConnect CRM Integration click on the topic below to start connecting.

- [Getting Started](#)
- [Configuring Integrations](#)

Or use the Table of Contents (above in windowed, left in full screen) to navigate through the full contents of this guide.

1.1. Getting Started

To begin using the NextConnect CRM Integration app you will need the following:

1. The NextConnect installer application
2. Your NextConnect Serial number (license)
3. Your NextLevel Portal credentials (username and password)

The link to the installer and the serial number will be provided to the Technical Contact for your account after the NextConnect feature has been enabled.

For pricing information or to have the NextConnect CRM Integration app added to your account please contact your NextLevel Client Services representative.

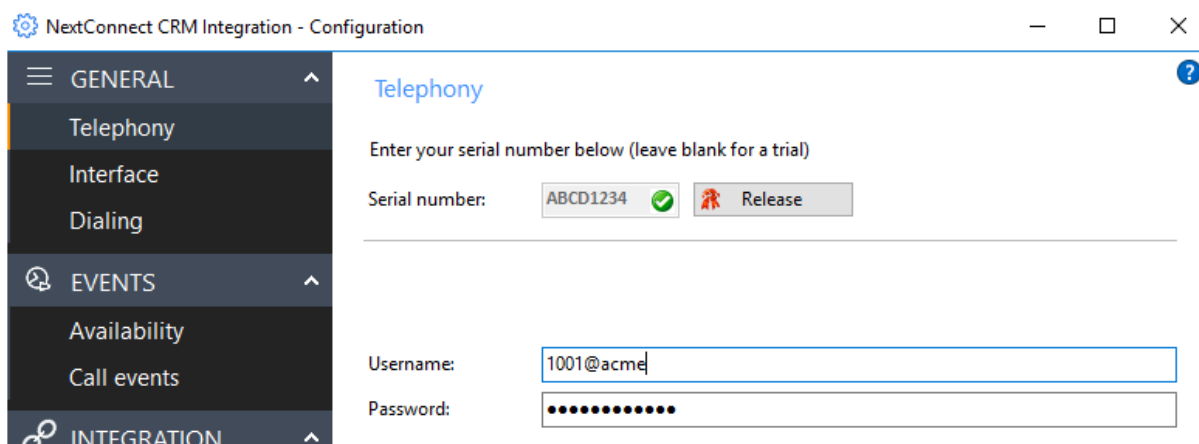
Install the NextConnect CRM Integration App

Download and run the NextConnect installer application. This may require Windows Administrator rights. Contact your company's network administrator for assistance.

Enter your Credentials

Once installation is complete the app will automatically open to the "Telephony" > "Configuration" section. Activate NextConnect by entering your credentials.

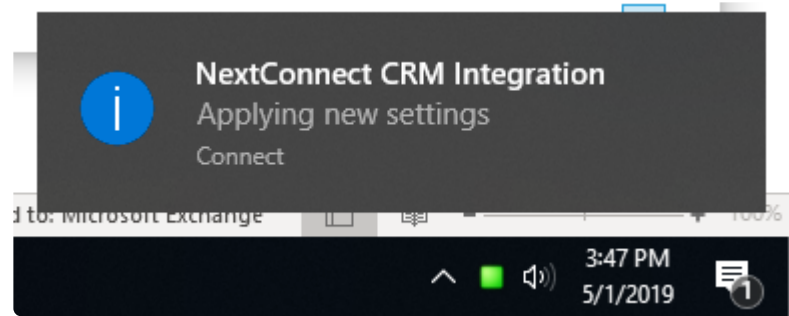
- Enter the provided Serial Number in the indicated field. A green check mark will appear to indicate you have a valid license.
- Click the "Set" button to confirm.
- Enter your NextLevel portal login in the "Username" field. This is the ext@domain username, such as 1001@acme. This is not your email address.
- Enter your NextLevel portal password in the "Password" field.
- Click "Save".



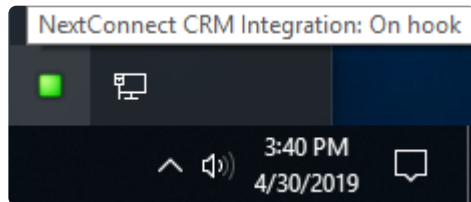
The screenshot shows the 'NextConnect CRM Integration - Configuration' window. The left sidebar has a menu with 'GENERAL', 'Telephony', 'Interface', 'Dialing', 'EVENTS', 'Availability', 'Call events', and 'INTEGRATION'. The 'Telephony' section is selected. The main area is titled 'Telephony' and contains the instruction 'Enter your serial number below (leave blank for a trial)'. There is a 'Serial number:' field with the value 'ABCD1234' and a green checkmark icon, followed by a 'Release' button. Below this, there is a 'Username:' field with the value '1001@acme' and a 'Password:' field with masked characters (dots).

- The application window will be minimized, and you will see an alert in your system tray that the app is

“Applying new settings”



- When you have entered the credentials successfully, the system tray indicator will turn green to notify you that the phone is “On Hook” and ready to accept calls.



Your NextConnect CRM Integration is now configured and connected to your NextLevel extension. Now you can begin connecting to your CRM and other Applications.

[Integrations](#)

Note – To manually access the configuration settings:

1. Right-click the NextConnect CRM Integration application in the system tray (the icon is a gray or green square). This will bring up the app menu
2. Click “Configuration” (the gear icon)
3. Click “Telephony” under the “General” tab

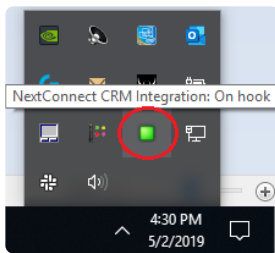
1.2. Common Configuration Settings

Documentation for configuring and using some of the most popular features.

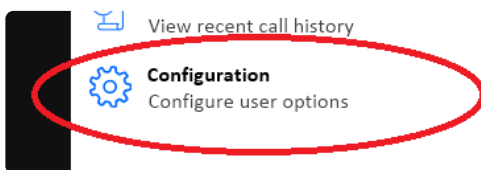
- [Click-to-Dial and Dialing Options](#)
- [Screen Popping](#)
- [Activity Logging](#)

1.2.1. Click-to-Dial and Dialing Options

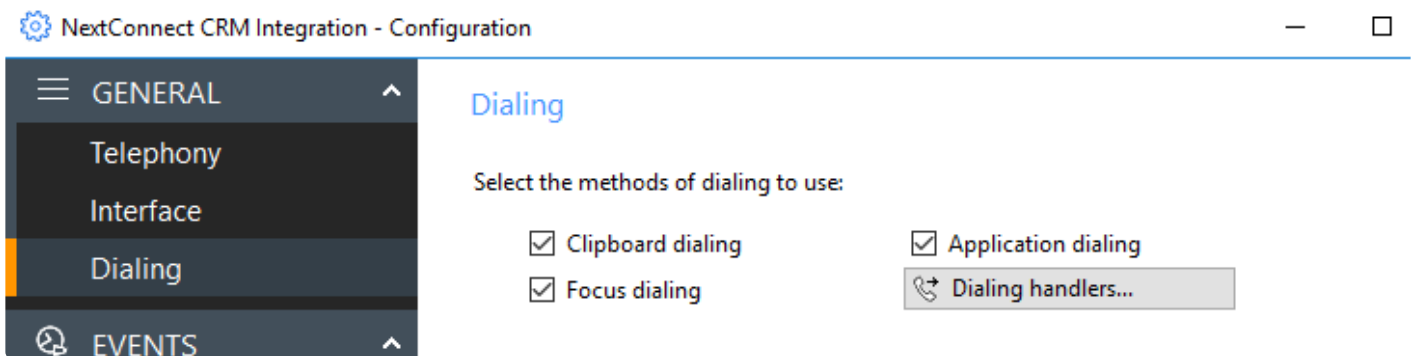
- Right click the NextConnect app in the windows system tray



- Click “Configuration”

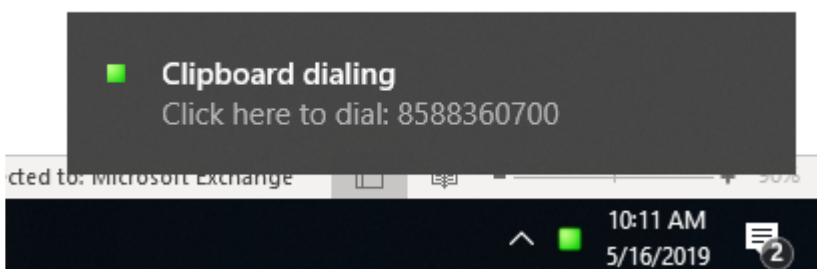


- In the “General” navigation menu click “Dialing”



Check the box for each dialing option you would like to enable

- Clipboard dialing – Will create a notification in the system tray whenever you copy a phone number (highlight and Ctrl+C, or right click and click copy) that you can click to dial that number



- Application dialing – Allows you to click-to-dial from applications that are TAPI enabled
- Focus dialing – Allows the NextConnect app to detect a phone number in a field of a Windows application when you hover over it

Phone numbers

Business...	(858) 836-0700 X4	📞	🔄	✕
Home...				


Browser Click-to-Dial via Dialing handlers

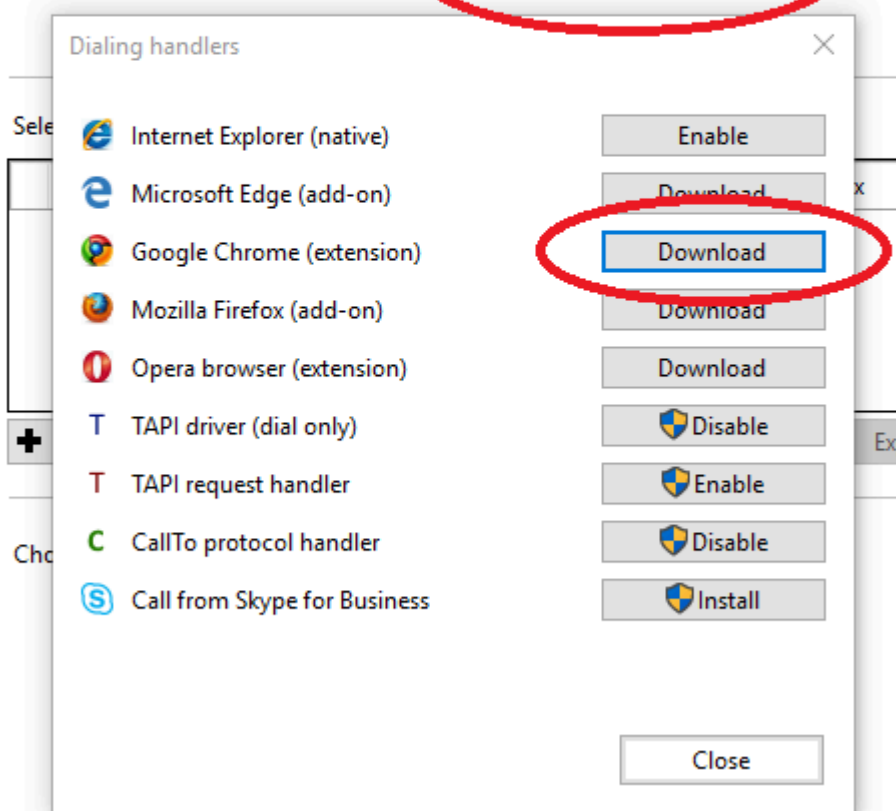
- Click “Dialing handlers” to launch the options

Dialing

Select the methods of dialing to use:

- ☒ Clipboard dialing
- ☒ Focus dialing
- ☐ Application dialing

 Dialing handlers...



- Click the “Download” or action button by the item you want to enable
- Follow the steps to add/download/install the dialer in the browser you have selected, or otherwise follow the prompts to complete the activation



chrome web store

[Home](#) > [Extensions](#) > Telephone Number Detection

Telephone Number Detection

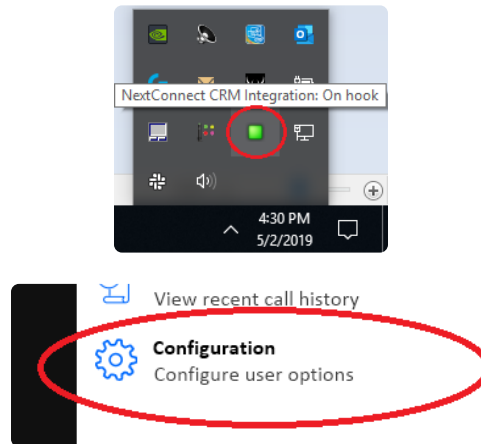
Offered by: CTI-Telephony

★★★★★ 28 | [Social & Communication](#) | 29,197 users

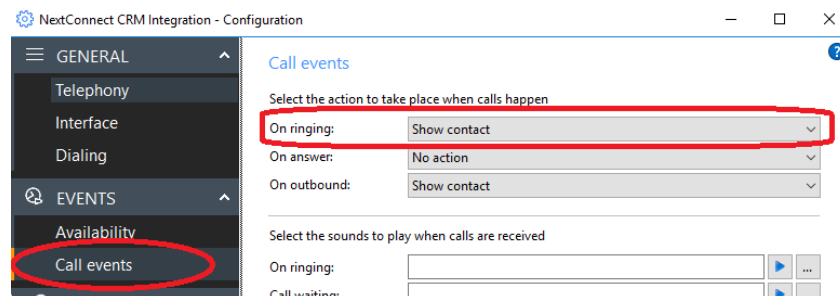
[Add to Chrome](#)

1.2.2. Screen Popping

- Right click the NextConnect app in the windows system tray
- Click “Configuration”



- In the “Events” navigation menu click “Call events”



Under the “Select the action to take place when calls happen” you can select what actions to take during three events: Ringing, answering and outbound calls.

Select the dropdown for each event. To “Screen pop” a contact, select “Show contact” from the dropdown.

- This will launch the contact related to the phone number in any integrated CRMs you have configured
- It is recommended **not** to use the same action for “On ringing” and “On answer”

Custom Events

You can create custom Screen Pops by entering a URL (or website address) that includes a phone number in it.


For example, in google contacts, you can search for contacts relating to phone number **858-836-0700** by using a URL that looks like: [https://contacts.google.com/search/ 8588360700](https://contacts.google.com/search/8588360700)

To automatically conduct a search like this in NextConnect, simply create a Custom Event including the URL string with the token **Call\Contact\Tel** where you want the phone number to appear. For example:

[**Call\Contact\Tel**](https://contacts.google.com/search/)

1. Navigate to **Configuration > Call Events**
2. Click the **+ Add** button to add a new event

3. From the **Event** dropdown, choose when you want this action to happen
 - **Ringing** will happen as soon as your phone starts ringing
 - **Button** will give you a new button to click on the call preview window to manually trigger the event
 - If you choose Button, a field will appear to add a label that will appear when you hover over the button
 - **Connected** will perform the action only once you've answered the call
4. From the **Direction** dropdown choose if you want this to happen for **all calls**, or only **inbound**, or only **outbound**.
5. From the **Calls** dropdown choose if you want this for **all calls**, or only **internal**, or only **external**
6. Leave the Program field **blank** to launch a browser window
7. The Parameters field will include the URL to launch when you receive a call.
 - a. Add the URL here with the token **Call\Contact\Tel** where you want the phone number to appear.
 - b. For example: [**Call\Contact\Tel**](https://contacts.google.com/search/)
8. Click **OK** to save

 Event ✕

Event:

Custom: Button

Direction:

All

Calls:

All

Text:

BUTTON NAME

Program:

...

Enter the full path of the program to run. To launch a browser window, leave this box blank.

Parameters:

https://contacts.google.com/search/%Call\Contact\Tel%

Enter the web page (including HTTP://) or parameter to pass to the executable. E.g: -Caller= %Call\CallerContact\Tel%

OK

Cancel

You may repeat this process to create multiple call events for different URLs.

1.2.3. Activity Logging

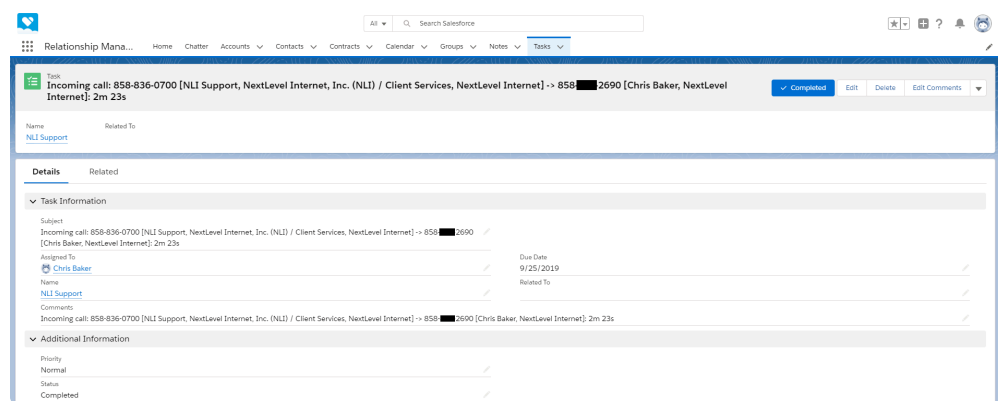
Activity Logging allows automatic or manual creation of Activity Log entries of your calls with contacts found in your CRM.

✿ Activity Logging is available for select CRM applications only. Please see below for list of currently supported CRMs.

Create activity on call end

This will automatically create a log of the call in your CRM after the call has been completed. The log will include the name and phone number of the participants, the time of the call, and the duration of the call.

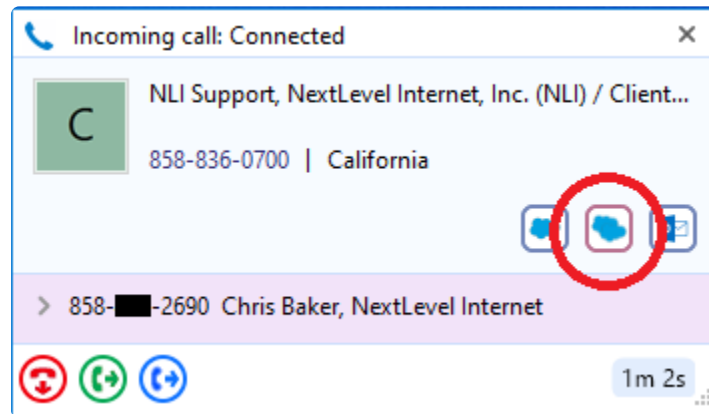
This will create an entry for completed Inbound calls, completed Outbound calls, and attempted Outbound calls.



Show activities on call

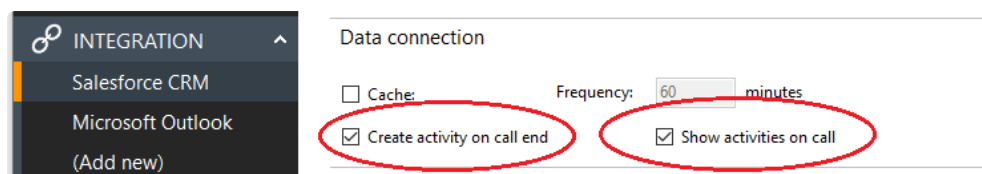
This will add a new button on the Call Preview window to launch a new Activity Log entry in your CRM. The new button will be a modified logo of the CRM outlined in red. The log will include the name and phone number of the participants, and the time of the call.

When using both "Create activity on call end" and "Show activities on call" all calls will be documented on call end automatically, unless you select to manually document a specific call by clicking the activity log button.



To enable Activity Logging:

1. Navigate to Configuration
2. Select your CRM from the Integration list.
3. Scroll down to the “Data connection” section and check one or both boxes: “Create activity on call end” and “Show activities on call”



Create Activity on Answer

Alternatively, you may automatically launch an Activity Log browser entry when an inbound call is answered. This will launch a new Activity Log entry in your CRM when the call is answered, including the name and phone number of the participants, and the time of the call.

To enable Create Activity on Answer:

1. Navigate to Configuration
2. Select Call Events on the left-hand menu
3. In the “On answer” dropdown, select “Create phone activity”

This option will create duplicate entries if used in conjunction with one of the options above.

Supported CRMs

Activity Logging is currently supported in the following CRMs:

- Salesforce
- Dynamics 365
- Hubspot
- Netsuite

- Connectwise
- Bullhorn

* The above features have been documented using Salesforce as an example. The exact features and functionality will vary based on the CRM you are using.

1.3. Integrations

NextConnect CRM license will empower you to connect your NextLevel phone system with one of dozens of CRM platforms.

- [Connect Microsoft Outlook](#)
- [Connect to Google Contacts](#)
- [Connect to Salesforce](#)
- [Connect to Microsoft Dynamics 365](#)
- [Connect to Microsoft Dynamics CRM](#)
- [Connect to Zendesk](#)

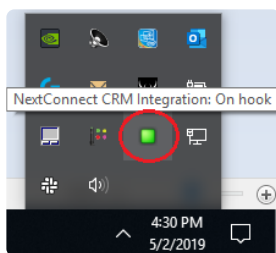
1.3.1. Connect to Microsoft Outlook

Credentials needed:

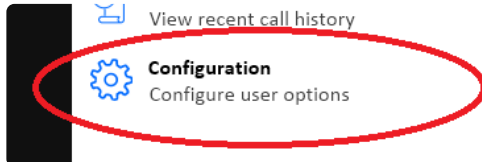
- Windows account username and password
- Microsoft Outlook profile information, username and password (if password protected)

Configuring the Integration

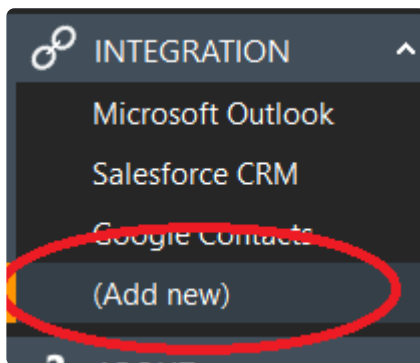
- Make sure you are signed into Outlook in Windows before proceeding. Outlook must be installed and activated to connect.
- Right click the NextConnect app in the windows system tray



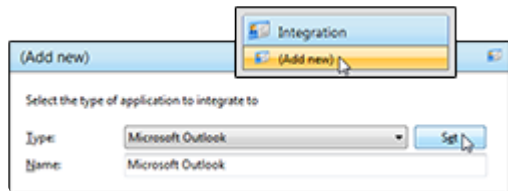
- Click "Configuration"



- In the "Integration" navigation menu click "(Add new)"



- Begin typing Outlook in the field, then select Microsoft Outlook and click set.



- Since you are already logged in to Outlook in Windows the app will automatically link
- The “outlook profile” and other dropdowns will be left at “Default” for most users
 - If you have multiple Outlook profiles or custom Personal Folder files you will need to select those from the dropdowns. Contact your local Windows system administrator if you are unsure.
- You can test by scrolling down to the Integration Test section and typing in a known phone number in your address book and click search. A string of text will appear.

Integration test

Telephone:	<input type="text" value="8588360700"/>	<input type="button" value="Search"/>
Result:	ContactType= Contact, Id= Contact:003f- OriginalId=00 AT, ShowURI=https://.salesforce.com/0 IIL AAT, ContactName=Client Services, CompanyName=NextLevel Internet, Inc. (MIL) Object=Contact TelephonePhone= (050) 026 0700 V4	
Actions:	<input type="button" value="Show contact"/>	

- If this test is not successful you may have to customize the configuration dropdowns. Contact your Outlook administrator for more information on which accounts you should use. Try selecting items in the dropdown that are most appropriate to your Outlook account
 - Outlook profile try Outlook
 - Information store: try your email address
 - Contacts folder: try Contacts or Contacts/GAL Contacts
 - Try the Integration Test again, adjust until the data is found.

Your Microsoft Outlook is now connected with NextConnect!

Now your Call Previews will include contact info pulled from your Outlook contacts.

You can search your Outlook contacts from the NextConnect search field, or in the NextConnect address book

You can manually Screen Pop your Outlook contact info from the Call Preview window, or enable automatic Screen Pop.

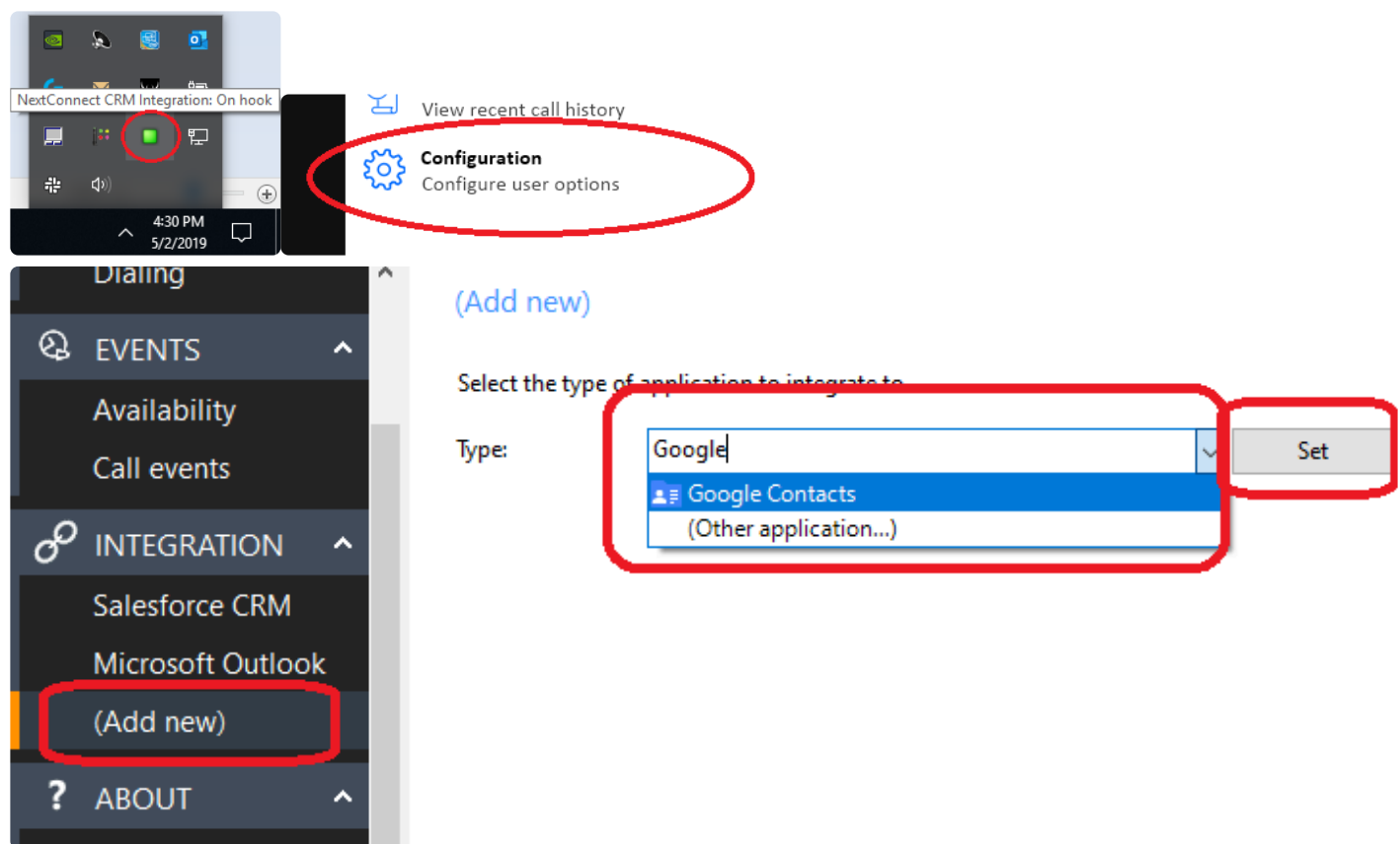
1.3.2. Connect to Google Contacts

Credentials needed:

- Google account username and password

Configuring the Integration

- Right click the NextConnect app in the windows system tray
- Click “Configuration”
- In the “Integration” navigation menu click “(Add new)”
- Begin typing “Google” in the field, then select Google Contacts and click “Set”.



- You will see a browser pop-up to authenticate (log in) to your google account
 - Enter your user name, password, and select “allow” to grant the displayed permissions
 - You may get a notification from Google that a new device has connected to your account, this is expected. The device will be called “UC” (for “Unified Communications”)

The first screenshot shows the 'Sign in' screen with the email 'support@nextlevelinternet.com' entered. The second screenshot shows the 'Welcome' screen with the password field masked. The third screenshot shows the 'UC wants to access your Google Account' screen with permissions for contacts and calendars.

- You can test by scrolling down to the Integration Test section and typing in a known phone number in your address book and click search. A string of text will appear.

Integration test

Telephone:

Result:

ContactType=Contact, Id=Contact:003f-
 OriginalId=00 AT,
 ShowURI=https://.salesforce.com/0 IL
 AAT, ContactName=Client Services, CompanyName=NextLevel Internet,
 Inc (NLI), Object=Contact, Telephone Phone=(958) 826 0700 V4

Actions:

Your Google Contacts is now connected with NextConnect!

Now your Call Previews will include contact info pulled from your Google Contacts.

You can search your Google Contacts from the NextConnect search field, or in the NextConnect address book

You can manually Screen Pop your Google Contacts info from the Call Preview window, or enable [automatic Screen Pop](#).

1.3.3. Connect to Salesforce

Credentials needed:

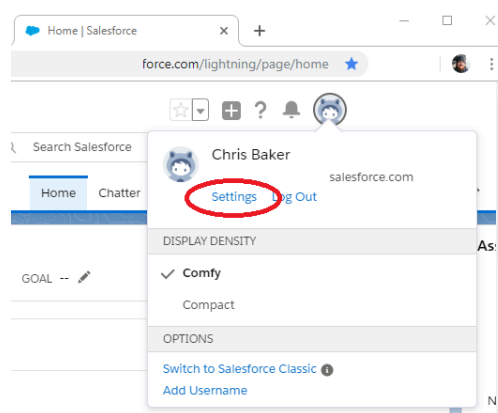
- Salesforce Login Username
- Salesforce Login Password
- Salesforce Security Token
- Salesforce Secure API password

Salesforce requires the use of the “Secure API Password”.

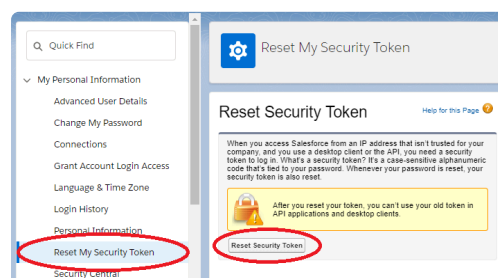
To get your salesforce Secure API Password, combine your Salesforce Login Password and Security Token by appending the token on the end of the password with no spaces.

To generate a Salesforce Security Token

- Log into Salesforce
- Click on your profile in the top right corner and select settings



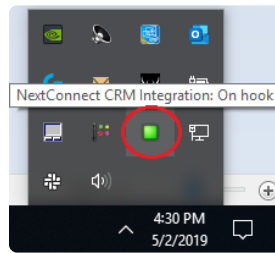
- Click “Reset My Security Token” link in the navigation menu and then on that page click “Reset Security Token”



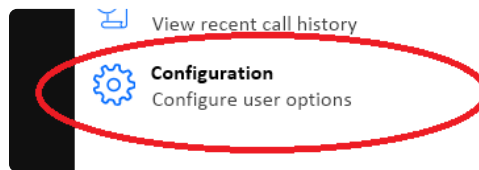
- A new token will be emailed to you.

Configuring the Integration

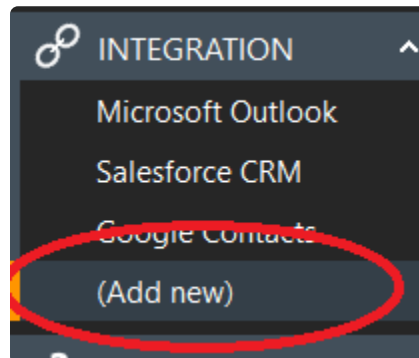
- Right click the NextConnect app in the windows system tray



- Click "Configuration"



- In the "Integration" navigation menu click "(Add new)"



- Begin typing Salesforce in the field, then select "Salesforce CRM" and click set.

(Add new)

Select the type of application to integrate to

Type: Set

☒ Salesforce CRM
(Other application...)

Standard Authentication

1. Select the radio button (checkbox) next to "Standard Authentication"
2. In the Username field enter your Salesforce Login Username, which is typically your email address
3. In the Password field enter your Salesforce Secure API Password, which is your combined password

+ security token

- a. This is case sensitive, make sure you use the correct case for both the Login Password and the Security Token.

✿ **Salesforce Secure API Password = [salesforce password+salesforce-token]**

✿ For example, if...

- Your Salesforce password is: **MyPassword123**
- and your Security Token is: **xyzSALES123FORCEabcTOKEN987**
- Then your Salesforce Secure API Password is:
MyPassword123xyzSALES123FORCEabcTOKEN987

4. It is recommended that you copy and paste your Salesforce Password and Security token together, then paste it into the NextConnect CRM Integration password field.

Salesforce CRM

Select the type of application to integrate to

Type:	<input type="text" value="Salesforce CRM"/>	<input type="button" value="Disable"/>
Name:	<input type="text" value="Salesforce CRM"/>	

Configuration

☒ Standard authorization

Username:	<input type="text" value="tweety@acme"/>
Password:	<input type="text" value="MyPassword123xyzSALES123FORCEabcTOKEN987"/>

5. You can test by scrolling down to the Integration Test section and typing in a known phone number in your address book and click search. A string of text will appear.

Integration test

Telephone:	<input type="text" value="8588360700"/>	<input type="button" value="Search"/>
Result:	<div style="border: 1px solid #ccc; padding: 5px;"> <p>ContactType=Contact, Id=Contact:003f- AT, OriginalId=00 AT, ShowURI=https:// .salesforce.com/0 IIL AAT, ContactName=Client Services, CompanyName=NextLevel Internet, Inc (MID) Object=Contact Telephone Phone= (959) 926 0700 V4</p> </div>	
Actions:	<input type="button" value="Show contact"/>	

Your Salesforce is now connected with NextConnect!

Now your Call Previews will include contact info pulled from your Salesforce contacts.

You can search your Salesforce contacts from the NextConnect search field, or in the NextConnect address book

You can manually Screen Pop your Salesforce contact info from the Call Preview window, or enable automatic Screen Pop.

OAuth Authentication

Alternatively, you can log into Salesforce via OAuth. OAuth offers an alternative way to connect to Salesforce Lightning and classic versions. See below on how to setup the OAuth account on Salesforce:

If your Salesforce account has a domain, go straight to 'Part 2'.

Part 1 – Creating a domain name in Salesforce

1. Log into your Salesforce account, and open the 'Setup' menu. Search for 'Domains' in the Quick Find Box, then select My Domains.
2. Enter the Domain Name you want to use, and press 'check availability', and then register.
3. Your domain should be emailed to you shortly after.

Part 2 – Creating a connected APP

1. In Salesforce Classic-Log into your Salesforce account, and open the 'Setup' menu. Click on Build > Create > Apps, then at the bottom of the page, under 'Connected Apps', press 'New'. In Salesforce Lightning-Log into your Salesforce account, and open the 'Setup' menu. In the quick find box, enter 'App' and then select 'App Manager'. Click 'New Connected App'.
2. Enter a Connected App Name, API Name, and Email address for your app.
 - a. Tick the 'Enable OAuth Settings' option.
 - b. Tick 'Enable' for Device Flow.
3. Add Callback URL as: <https://login.salesforce.com/services/oauth2/success>
4. Under Available OAuth Scopes, bring over
5. 'Access and manage your data (api)'
6. 'Perform requests on your behalf at any time (refresh_token_offline_access)'
7. Uncheck 'Require Secret for Web Server Flow' option.
8. Press save, followed by the Continue button.
9. You will now see the Connected App definition – make note of your 'Consumer Key'.

Note: Allow from 2-10 minutes for your changes to take effect on the Salesforce.com server before using the connected app.

Now, on the Software Suite configuration, select 'OAuth', and paste in your Domain and Client ID (Consumer Key). Press authorize.

Note: The domain you enter will need to be something like 'johnsmithsalesforce-dev-ed' if your Salesforce URL is 'https://johnsmithsalesforce-dev-ed.my.salesforce.com/'.

Please note the correct domain and client ID (consumer key) needs to be entered before pressing the authorize button. If one of these is incorrect, please delete the integration and start again.

1.3.4. Connect to Microsoft Dynamics 365

Credentials needed:

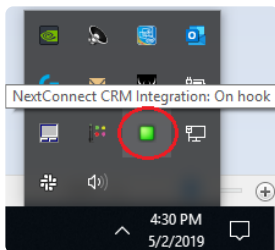
- Windows account Username and Password

You may need:

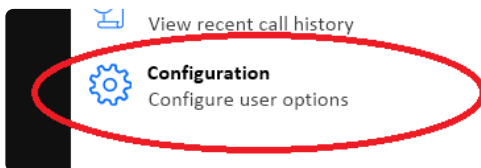
- Dynamics Username and Password
- Dynamics Client ID
- Dynamics Server

Configuring the Integration

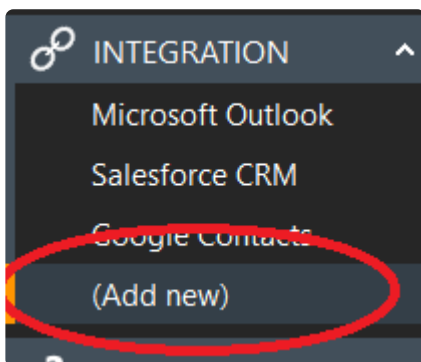
- Right click the NextConnect app in the windows system tray



- Click "Configuration"



- In the "Integration" navigation menu click "(Add new)"



- Begin typing "Microsoft Dynamics 365" in the field or scroll through, then select Microsoft Dynamics 365 Customer Engagement and click set.

Select the type of application to integrate to

Type: Microsoft Dynamics 365 Customer Engagement Set

Application: Microsoft Dynamics 365 Customer Engagement

- On the Configuration group, First select the method you use to log in to your Microsoft Dynamics 365 Customer Engagement.

Microsoft Dynamics 365 Customer Engagement

Select the type of application to integrate to

Type: Microsoft Dynamics 365 Customer Engagement Disable

Name: Microsoft Dynamics 365 Customer Engagement

Configuration

☐ Online / IFD (OAuth)

Client id:

☒ On-premises (network credentials)

Username:

Password:

(leave blank to use your Windows credentials)

Server:

(leave blank for Dynamics 365 Online)

Organization: List...

Entities:

- ☒ Accounts
- ☒ Contacts
- ☒ Leads
- ☒ Users

Data connection

Save Cancel

- If you choose Online/ IFD (OAuth), then enter your Client ID into the appropriate box.
- If your Microsoft Dynamics 365 Customer Engagement server is available on your LAN, select 'On-premise'. Fill in your Microsoft Dynamics 365 Customer Engagement credentials, or leave blank to

use your Windows Credentials.

- In the 'Server URL' text box, you need to enter the web address you visit to access Microsoft Dynamics 365 Customer Engagement e.g. <http://mscrm/>. You'll find this info in browser's address bar when you login to Microsoft Dynamics 365 Customer Engagement.
- After entering the details above, click 'List' and all the organizations that your user has access to will be listed in the 'Organization' box. Usually your user will only have access to one organization.
- In the Entities section, are the categories of records in Microsoft Dynamics 365 Customer Engagement that can be looked up in searches and popped. Check all of them to allow NextConnect access to all.
- Click the 'Save' button to store the information you've entered and apply the configuration.
- You can test by scrolling down to the Integration Test section and typing in a phone number known to be in your CRM and click search. A string of text will appear.

Integration test

Telephone:	<input type="text" value="8588360700"/>	<input type="button" value="Search"/>
Result:	<div>ContactType=Contact, Id=Contact:003f- OriginalId=00 AT, ShowURI=https://.salesforce.com/0 IL AAT, ContactName=Client Services, CompanyName=NextLevel Internet, Inc (MID), Object=Contact, TelephonePhone=(050) 826 0700 V1</div>	
Actions:	<input type="button" value="Show contact"/>	

Your Microsoft Dynamics 365 is now connected with NextConnect!

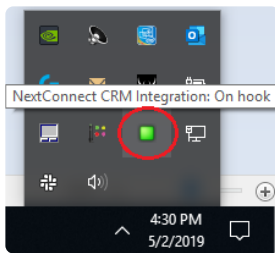
Now your Call Previews will include contact info pulled from your Dynamics 365 contacts.

You can search your Dynamics 365 contacts from the NextConnect search field, or in the NextConnect address book

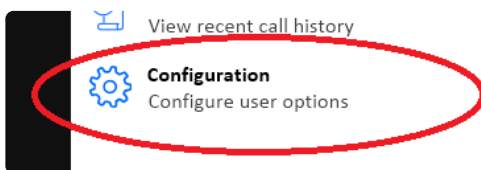
You can manually Screen Pop your Dynamics 365 contact info from the Call Preview window, or enable automatic Screen Pop.

1.3.5. Connect to Microsoft Dynamics CRM

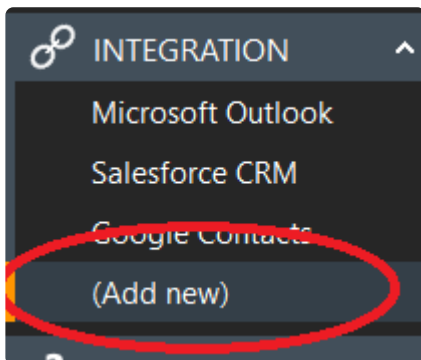
- Right click the NextConnect app in the windows system tray



- Click "Configuration"



- In the "Integration" navigation menu click "(Add new)"



- Begin typing "Microsoft Dynamics CRM" in the field or scroll through, then select Microsoft Dynamics CRM and click set.

Select the type of application to integrate to

Type: Set

- Microsoft Dynamics 365 Customer Engagement
- Microsoft Dynamics CRM**
- Microsoft Dynamics NAV
- (Other application...)

- On the Configuration group, First select the method you use to log in to your Microsoft Dynamics CRM.

Microsoft Dynamics CRM

Configuration

Select the method you use to log in to Microsoft Dynamics CRM:

- ☒ Use my Windows credentials
- ☐ Use a different Windows username
- ☐ Use a federated (claims-based) identity
- ☐ Use a Windows Live ID (CRM Online)
- ☐ Use online federation (Office 365 / Dynamics 365)

Enter your server and user details:

Server URL:

Deployment type: ☒ On-premise
☐ Hosted (IFD)

Location:

Username:

Password:

Domain:

Version: ☐ Use CRM 2011 or newer services

Organization:
(CRM 4 and above only)

Inactive records: ☐ Exclude inactive records

Entities: ☒ Accounts
☒ Contacts
☒ Leads
☒ Users

- On the 'Deployment type', select which type of Microsoft Dynamics CRM you use.
- If you choose (CRM Online) for log in enter your Windows Live ID information, including which of Microsoft's server groups you log on to (Europe, Asia-Pacific, or Americas).
- If your Microsoft Dynamics CRM server is available on your LAN, select 'On-premise'. Select 'Hosted (IFD)' if it is over the Internet but not via Microsoft CRM Online. For either case, in the 'Server URL' text box, you need to enter the web address you visit to access Microsoft Dynamics CRM e.g. <http://mscrm/>. You'll find this info in Internet Explorer's address bar when you login to Dynamics.
- Under the 'Server URL' box, select which type of authentication to use. Most users will be able to use the 'Use Windows credentials' option. If you are prompted for username and password when loading

Microsoft Dynamics CRM in your browser, uncheck 'Use Windows credentials' and enter the relevant details in the 'Username', 'Password' and 'Domain' textboxes below it.

- For those of you using version 4 or above of Microsoft Dynamics CRM, your organization needs to be selected also. After entering all of the details above, click 'List' and all the organizations that your user has access to will be listed in the 'Organization' box. Usually your user will only have access to one organization.
- Select which of your Dynamics account modules you want to be used by checking the corresponding boxes in the 'Entities' section.
- Click the 'Save' button to store the information you've entered and apply the configuration.
- You can test by scrolling down to the Integration Test section and typing in a phone number known to be in your CRM and click search. A string of text will appear.

Integration test

Telephone:	<input type="text" value="8588360700"/>	<input type="button" value="Search"/>
Result:	<div>ContactType= Contact, Id= Contact:003f- OriginalId=00 ShowURI=https:// AAT, ContactName=Client Services, CompanyName=NextLevel Internet, Inc. (MID), Object=Contact, TelephonePhone=(050) 026 0700 VA</div>	
Actions:	<input type="button" value="Show contact"/>	

Your Microsoft Dynamics CRM is now connected with NextConnect!

Now your Call Previews will include contact info pulled from your Dynamics CRM contacts.

You can search your Dynamics CRM contacts from the NextConnect search field, or in the NextConnect address book

You can manually Screen Pop your Dynamics CRM contact info from the Call Preview window, or enable automatic Screen Pop.

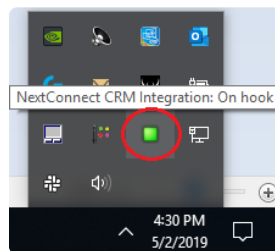
1.3.6. Connect to Zendesk

Credentials needed:

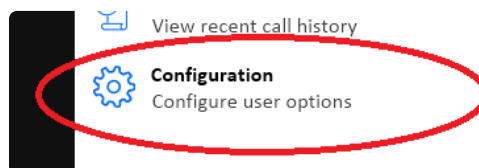
- **Zendesk subdomain**
- **Zendesk email**
- **Zendesk password or Authentication Token**

Configuring the Integration

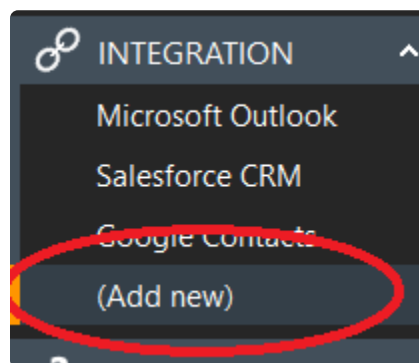
- **Right click the NextConnect app in the windows system tray**



- **Click “Configuration”**


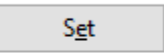



- **In the “Integration” navigation menu click “(Add new)”**



- **Begin typing Zendesk in the field, then select Zendesk and click set.**

Select the type of application to integrate to

Type:  

 Zendesk
(Other application...)

Application: Zendesk

- On the Configuration group, enter the Zendesk subdomain, Email, password or authentication token.

Configuration

Subdomain:

Email:

Password:

☒ Fuzzy number matching (slower)

☒ Talk Partner Edition popping

Note: Subdomain should not be the full URL address. For example, if the URL was “https://www.**acme-inc**.zendesk.com”, the subdomain would be “**acme-inc**”. You can find out your subdomain by going on Zendesk Settings > Settings > Account > Subdomain.

Note: Zendesk API “Password Access” needs to be enabled. To do this, go onto Zendesk Settings > Channels > API > Password Access.

Note: You can also use an Authentication Token instead of your Zendesk Password. For information on setting this up, follow this link: <https://support.zendesk.com/hc/en-us/articles/226022787-Generating-a-new-API-token->. If you do use an Authentication Token, you will need to add ‘/token’ at the end of your email in the box, and then enter your token in the password box.

Click the ‘Save’ button to store the information you’ve entered and apply the configuration.

Talk Partner Edition Popping Option

Uncheck the ‘Talk Partner Edition popping’ box to use core API screen popping. This will screen pop into a new tab on your web browser.

Check the ‘Talk Partner Edition popping’ box to use the Talk API screen popping. This will screen pop to the existing open Zendesk browser window. Please note, this requires the Talk partner edition license on Zendesk.

Your Zendesk is now connected with NextConnect!

Now your Call Previews will include contact info pulled from your Zendesk contacts, and you can search your Zendesk contacts from the NextConnect search field, or in the NextConnect address book. You can manually Screen Pop your Zendesk contact info from the Call Preview window, or enable automatic Screen Pop.



View [Common Configuration Settings](#) guide to enable Click-to-Dial or Screen-Popping options



View [Integrations](#) guide to add more connected CRMs or Communications Databases

1.4. Troubleshooting

Installation

Problem	Solution
Error message indicating cannot access files	Save and exit all programs, and reboot PC
Error message indicating cannot access Outlook files	Save and exit Microsoft Outlook

Connecting to NextLevel Phone System

Problem	Solution
No call preview window / status indicator is gray	Re-enter nextlevel portal credentials. Create new password with no "#".

Download

Download the NextConnect CRM Integration app here: <https://www.nextlevelinternet.com/nextconnect-file-download-and-getting-started/>