Getting Started

Welcome to Call On CRM for ACT!, an innovative add-on that fully integrates your Skype application with ACT!. Call On CRM gives you a toolbar in ACT! that lets you place, answer, track, and record details about your calls without ever leaving ACT!.

This document guides you through installing and setting up Call On CRM. For complete instructions for using Call On CRM features, see the online Help by clicking Settings on the Call On CRM toolbar and then clicking Help.

System requirements

Before installing Call On CRM, ensure that you meet the following system requirements:

- ACT! or ACT! Premium 10.0.1 or later
- Skype 3.0 or later with a registered Skype account.

Installing Call On CRM

1. Close ACT! and any other applications you are running.
2. Double-click the setup file you downloaded and follow the wizard screens to install the plug-in.
3. When the installation finishes, start ACT!.

Setting up your account

When you start ACT!, you will see the Call On CRM toolbar at the top of your default view under the ACT! toolbar. You must now register Call On CRM and configure your Skype account to work with Call On CRM.

1. Ensure your Skype application is running and you are logged in to your Skype account.
2. On the Call On CRM toolbar, click **Settings**.

   The Settings dialog appears.
3. Click the **Skype Settings** tab.
4. Click Request Skype Permission to give Call On CRM permission to work with Skype.
5. Switch to your Skype application and accept the permission request for ActSage.exe.

   Call On CRM is now connected with Skype. On the Call On CRM Skype Settings tab, a connected icon displays along with your Skype ID.
6. Click **Apply** to save your Skype handle.
7. Click the **Licensing** tab.

   Call On CRM assigns you a trial license based on your Skype account ID.
8. Click **OK**.

To activate a full license valid after the trial period

1. Register for an account and log on to the Call On CRM web site at http://www.CallonCRM.com.
2. Click the **Licensing** tab.
3. From the **Select a product to license** drop-down list, select **Call On CRM - Skype**.
4. Enter your Skype ID in the box provide, and then click **Create New or Link Trial License**.

Your Skype ID is now associated with your Call On CRM web site account, and appears in the Call On CRM Active Licenses table.

The licensing system operates on credits that let you extend the expiration date of your account. Each credit is worth one month of service.

5. Click **Get Skype Credits** to receive six credits.
6. Click **+3** twice to apply all six credits to your license.

   The License Type changes to Active and your expiration date moves out six months.
7. In ACT!, return to the **Licensing** tab of **Skype Settings** and verify that your license information has updated.
8. Click **OK**.

Integrating additional Skype features

Call On CRM includes three ways to integrate Skype features into ACT!. Configure these features before using Call On CRM.

Important note: As a prerequisite to using these features, use the ACT! Define Fields tool to create a contact field with Skype in its name (for example, "Skype ID"). Use the ACT! Layout Designer to place this field on your contact layout. Doing this allows Call On CRM to recognize the Skype IDs of your contacts.

Adding a Skype button to your ACT! layout to enable Skype status and other features

1. In the ACT! Layout Designer, click the **Custom** toolbox.
2. Drag the Skype button onto your contact layout.

You now have a Skype button on your layout. When you browse to any contact for whom you have entered a Skype ID, the button shows their Skype status. Right-click the button to access additional Skype features from inside ACT!.

Enabling Skype-to-Skype calling

1. On the Call On CRM toolbar, click **Settings**.
2. Click the **Skype Settings** tab.
3. From the **Skype Call Matching** drop-down list, select the Skype field you set up in ACT!.

You can now make Skype-to-Skype calls, in addition to normal phone calls, to contacts for whom you have entered a Skype ID. See Help for more information.

Enabling ACT! Team Integration

If you have Teams set up in ACT! (an ACT! Premium-only feature),you can configure Call On CRM to integrate Skype features with those teams.

1. On the Call On CRM toolbar, click **Settings**.
2. Click the **ACT! Team Integration** tab.
3. Select **Enable Team Collaboration**.
4. In the **Team Filter** box, select what teams to display in the Call On CRM toolbar.
5. From the **Select Skype Handle Field** drop-down list, select the Skype field you set up in ACT!.
6. Click **OK**.

You can now view and manage Skype functions for ACT! teams from the Call On CRM toolbar. See Help for more information.