BULLETIN: Xchange CRM Viewer v3   **XCHANGE**

Introduction

"CRM Viewer" is the name given to Xchange's web application that provides a simple way to look up business applications available for integration with Xchange.

Over the past years both the range of business applications supported and the types of integration features available in Xchange CTI has been increasing. The current CRM viewer was not designed with these changes in mind and version 3 is being introduced to ensure the (sometimes complex) information associated with integration options can be delivered as effectively as possible.

Please note: Version 3 of the CRM Viewer is not explicitly related to version 3 of the desktop client.

This bulletin describes the improvements made to the CRM Viewer v3 plus other important related information.

Changes to classification system

Before we describe the changes to the layout of the CRM Viewer we will describe important modifications to the classification system used for each integration.

Changes to "Integration Classification"

New "Standard" classification – Standard is now an amalgamation of (and replaces) the two classifications previously called "Standard" and "Partner". Standard integrations are defined as:

- available by default within the Xchange client and installation can be completed by the reseller / end user using the add-in guides provided.
- use open APIs and/or benefit from partner agreements with the application developer enabling long term support and maintenance of the integration.

New "Controlled" classification – "Controlled" replaces the classification previously known as "Other". Controlled integrations are defined as:

- typically provided on a customer project basis and do not necessarily benefit from a partner arrangement between Xchange and the Application Developer. As such support can only be provided on a case by case basis and support for future versions might not be available. The integration add-in is not available by default within the Xchange client and must be enabled by the Xchange developer at the time of installation.

Removal of "Integration Category"

Integration Category (Support, Specialist, Beta and Not Supported) has been removed from the classification system. "Integration Classification" and the "Notes / Advisories" section will be used to convey any information previously covered by this status.

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Adjustment for TAPI integrations

An "Integration classification" will no longer be given for TAPI type integrations. This is because TAPI integration is mainly a function of the business application rather than the TAPI driver and Xchange are ultimately providing just the driver rather than an integration to the business application.

CRM Viewer v3 gives an historical list of TAPI compatible applications that have previously been known to work with our TAPI driver rather than a guarantee* that the business application will always be compatible with it. It is also important to note that the driver may work with TAPI compatible applications we have no previous experience with and, we would encourage any user to try it with or without our involvement. If you find that a business application is compatible with our driver then please let us know and we will update CRM Viewer to reflect this.

* we do partner with some application developers who provide telephony integration through TAPI and, in such instances, we would expect to support current and future releases of their product. CRM Viewer V3 does not currently show this information but will in the future
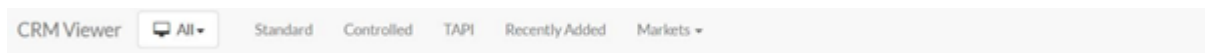
Changes to web-page layout

Introduction page

The layout and information contained within the introduction page has been designed to more easily provide essential information

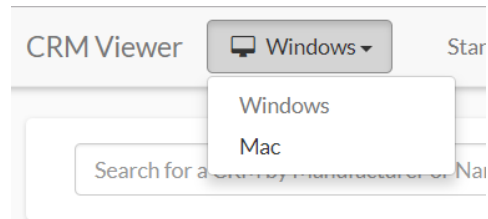# BULLETIN: Xchange CRM Viewer v3

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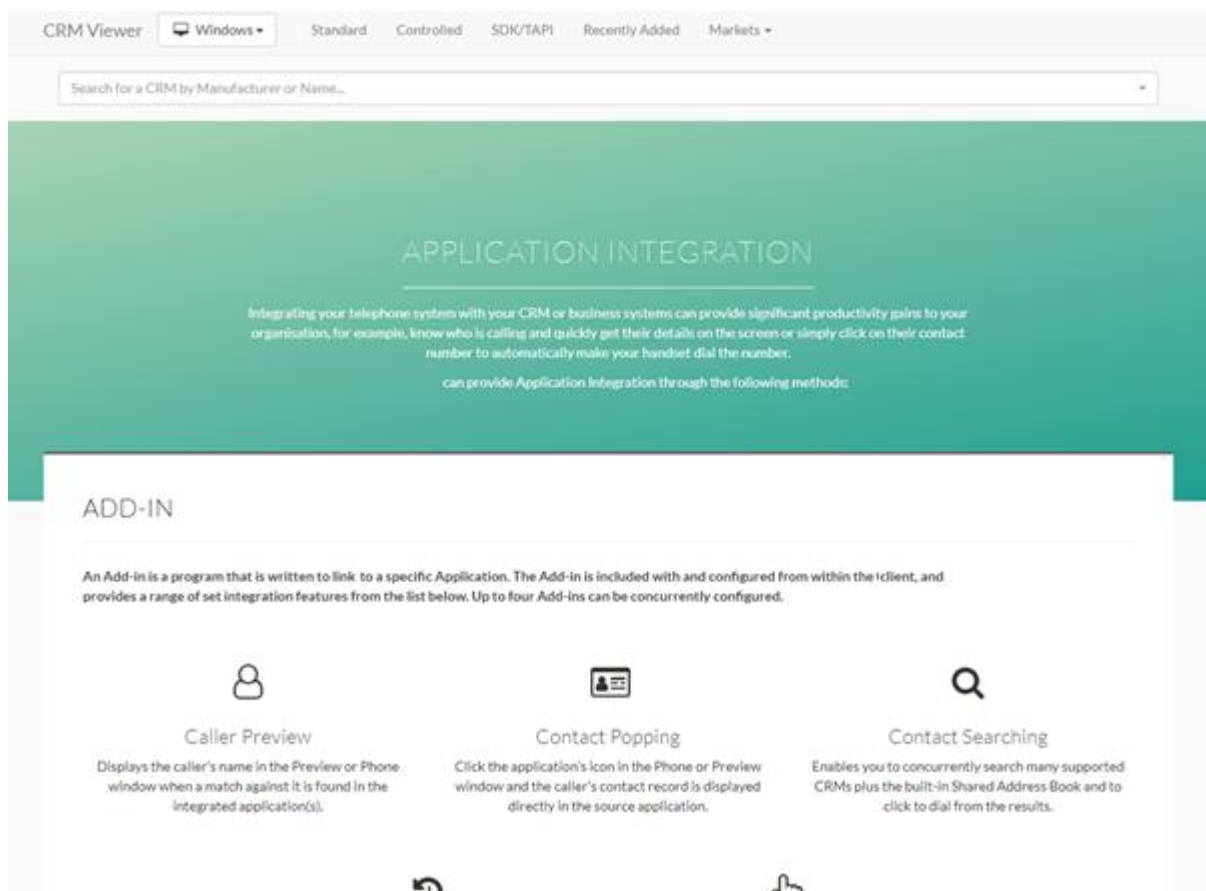
Main title bar

New platform selector

Introduction of the platform selector allows you to see the integrations filtered by Platform. Simply choose from the drop-down menu bar the platform you want your search to be based on. There are two options: Windows or MAC. The default search is set to Windows.


Note: selection of the platform determines the results that will be displayed when you select from the title bar filters of Standard / Controlled / TAPI / Recently added and Markets. It also determines the search results when using the main search bar.

New filter options

The previous filter options of Standard, Partner, Recently Added and Markets has changed to Standard, Controlled, TAPI, Recently Added and Markets (please see the previous section for more details on classification section)

Main Search bar

The main search bar in CRM viewer version 3, has been updated to incorporate the platform selector as described earlier. For example, if the platform selector is set to MAC, only integrations specific to MAC will be in your results.
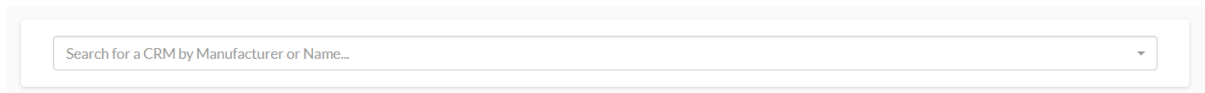

Integration information detail

For CRM Viewer v3, we show the most important and relevant information toward the top of the page.

Firstly, you will see a box that states: 'All content on these pages are related to the latest supported release'. This an advisory that the features shown are only applicable to the latest supported release of Xchange. Details of the latest supported release can be found on the main product pages and / or via your micro-site.

Below the box, you will see the application name. It is important to note that there are applications that can have very similar names, it is therefore advisable that you make sure you are looking at the correct integration page.

Below the application name you will find two or three boxes. This is an update from CRM viewer v2. Client add-in integrations will display three boxes, whereas TAPI or SDK based integrations only display two. The classification boxes for "Controlled integrations" are coloured amber just to make it more obvious that caveats exist and should be understood prior to installation.

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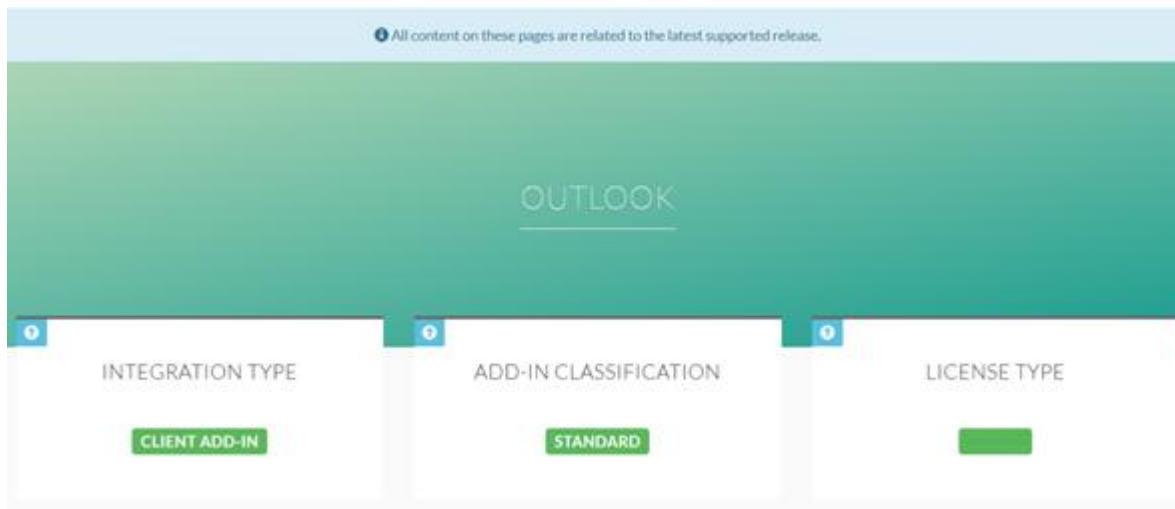
Where an information box has a help icon in the top left corner then, clicking on this box, will provide and explanation of the option available in this box.

Another important area of change is the "Supported Features" section. You may notice this has three extra feature options that are either already available or planned for the version 3 client.
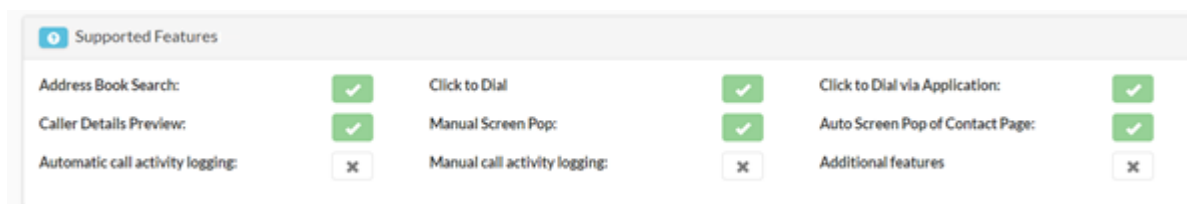
Note: if 'Additional features' has a tick, details of the additional feature or features, will be detailed in the Notes / Advisories box (explained bleow)

Notes / Advisories
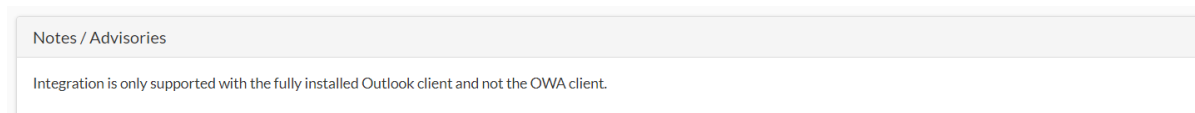
A Note / Advisory can contain important information regarding the integration, therefore it would be prudent to check this information. An example of the information contained here could be 'Will require the direct involvement of the manufacturer to assist with the integration'.

More Information

If you require any further information please raise a Sales ticket through the Xchange CTI ticketing system.