

This document informs the reader about technical issues regarding TAPI functionality, Microsoft Outlook security, and fax configuration.

This technical white paper is specifically about third-party technical issues that may be encountered when installing and demonstrating CRM – Marketing & Sales. While Navision does not sell or support these devices, we provide the information in this paper to facilitate using our product. If you require more information, you should contact the relevant provider directly.

Content

| | |
|--|---|
| CRM – Marketing & Sales Technical White Paper | 1 |
| Using TAPI (Telephony Application Program Interface) | 1 |
| Microsoft Outlook Security | 2 |
| Fax Configuration in Windows 2000/Office 2000 | 3 |
| About Navision | 5 |

CRM – Marketing & Sales Technical White Paper

Using TAPI (Telephony Application Program Interface)

TAPI (Telephony Application Program Interface) is a standard program interface that lets you and your computer "talk" over telephones or video phones to people or phone-connected resources elsewhere in the world. If you have the right installation, Navision Attain™ can dial up the phone number of your contacts when you want to call them. To do this, you must have TAPI-compliant telephone equipment.

TAPI is a technology that merges classic and IP telephony. Possible applications range from simple voice calls over the Public Telephone Network to multicast multimedia IP conferencing. There is no difference in how Navision Attain handles these

methods. For the time being, Navision Attain is only using a very small subset of all these functions – the phone dial functionality.

The TAPI functionality is a standard part of any Windows 98 (or later) installation. The specific component is called Tapi32.dll. Windows is handling all the technical issues when a client (Navision Attain) wants to make a phone call through connected telephony equipment. This means, that all set up is done in Windows not the Client program. The client will just tell TAPI to dial. The TAPI functionality in Windows can be set up to take advantage of, for

instance, an IP Server complex or a simple TAPI compliant modem. This makes the interface to the client (Navision Attain) generic.

Microsoft Outlook Security

Microsoft has introduced a significant security countermeasure for Outlook 2000 - the Outlook 2000 SR-1 E-mail Security Update. This update will protect your Outlook program from most viruses spread through attachments in emails. This update is part of Service Pack 2 and is included in Outlook XP (Outlook 2002).

However, in order to provide a higher level of security, the Outlook 2000 SR-1 Email Security Update limits certain functionality in Outlook. This conflicts with

some of the functions that CRM – Marketing & Sales uses when sending e-mails.

In order to reduce the impact of the countermeasure on CRM – Marketing & Sales, customers need to change the default security settings. You can find the tool to do this, as well as additional information and instructions on usage here:

<http://support.microsoft.com/support/kb/articles/q263/2/97.asp>

After installing the tool, change the property, *When sending items via Simple MAPI to Automatically approve*.

Warning

Lowering any default security setting may increase your risk of virus execution or propagation. Use caution and read the documentation before you modify these settings.

NAVISION[®]
The Way to Grow

Fax Configuration in Windows 2000/Office 2000

When running campaigns in CRM – Marketing & Sales, you can send letters directly via your fax machine. To do this you need to have set up fax configuration in Windows using the following procedure:

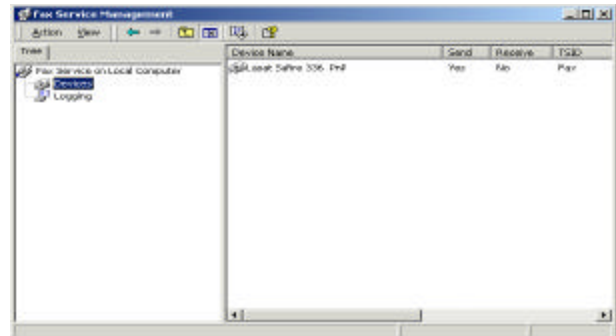
1. If you have an external modem, turn it on.
2. Boot Windows 2000. Log in using local administrator rights.

In most cases Windows 2000 will automatically detect the modem and install the appropriate modem driver and the Microsoft fax printer driver. If not you will have to run the Add Hardware Wizard and install the modem manually.

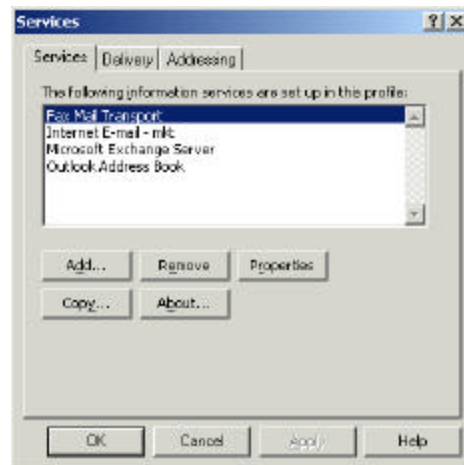
You can see that a modem driver is installed by clicking Control Panel, Phone and Modem Options. A Microsoft fax printer driver should also be installed. To check this, click Settings, Printers.



3. Ensure that your modem driver is created as a device by clicking Control Panel, Fax, Advanced Options, Open Fax Service Management Console.



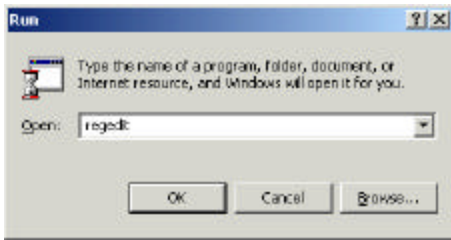
4. Start Outlook 2000. Click Tools, Services. The Services window appears.



5. Add the Fax Mail Transport service and restart Outlook.

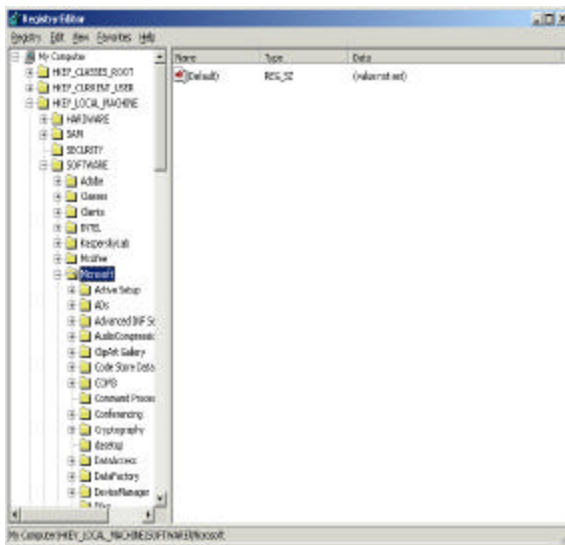
NAVISION[®]
The Way to Grow

6. Click Start, Run and run Regedit.exe.

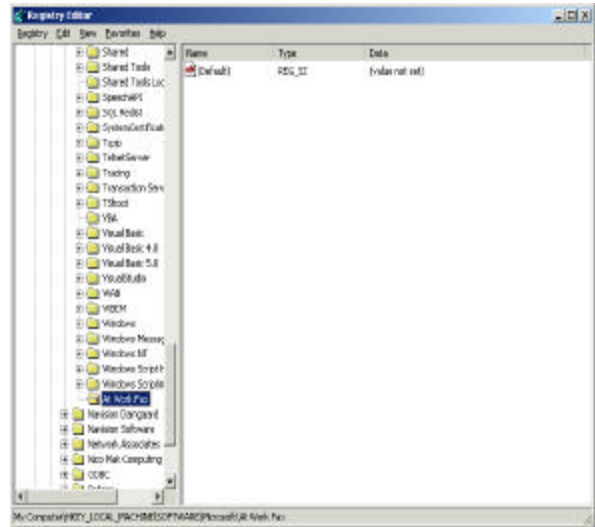


7. In the Registry Editor window, create a Registry Key in the following location:

My Computer\HKEY_LOCAL_MACHINE\Software\Microsoft



8. Click Edit, New, Key and add the key *At Work Fax*. You do not have to add any values.



9. Exit the Registry Editor.

You are now able to take advantage of the fax functionality in CRM – Marketing & Sales.

About Navision

Navision a/s is a leading global provider of cost-effective and adaptable integrated business solutions that help companies in their quest to grow. The company has more than 130,000 customers worldwide, a global network of more than 2,250 partners, and around 1,100 employees in 29 countries. The Navision product line consists of Navision Axapta[®], Navision Attain[®]/ Navision Financials[®], and Navision XAL[®]. Navision a/s was created through the merger of Navision Software a/s and Damgaard A/S in December 2000. Its shares are listed on the Copenhagen Stock Exchange (CSE: NAVI). The company is headquartered in Vedbaek, Denmark. You can learn more about Navision a/s on the Internet at www.navision.com.

Copyright © 2001 Navision a/s, CBR No. 76 24 72 18. The trademarks referenced herein and marked with either [™] or [®] belong to Navision a/s. The names of actual companies and products mentioned herein may be the trademarks of their respective owners. No part of this document may be reproduced or transmitted in any form or by any means, whole or in part, without the prior written permission of Navision a/s. Information in this document is based on Navision Attain version 2.6 and subject to change without notice. All rights reserved.

Address:

Navision a/s
Frydenlunds Allé 6
2950 Vedbaek
Denmark
Tel +45 45 67 80 00
Fax +45 45 67 80 01
www.navision.com

NAVISION[®]
The Way to Grow