



About

The CRM (Customer Relationship Management) Integrator Client application aims to make communication a little more convenient. With the client you can set up a phone call with one click, i.e., ‘click-to-call,’ from any Windows application or website. Moreover, it provides you with relevant information about a calling party from your own central customer database, i.e., ‘caller recognition.’ And best of all, the application offers a one-click shortcut to that caller’s info screen within your own CRM application, i.e., a ‘screen pop.’ This document describes how to use these functionalities.

First Time Sign In

The first time the client starts, you need to sign in using your credentials.

Telesystem Blue Customers will use their *phonenumber@combuckeye.com* (example: 5555551212@combuckeye.com) for the Email field. Your Webex or Call Management Portal password will be used for the Password field.

Telesystem Green Customers will use their *phonenumber@pbx.telesystem.us* (example: 5555551212@pbx.telesystem.us) for the Email field. Your MaXUC or Comm Portal password will be used for the Password field.

Sign in
Enter your CloudCTI credentials

Email

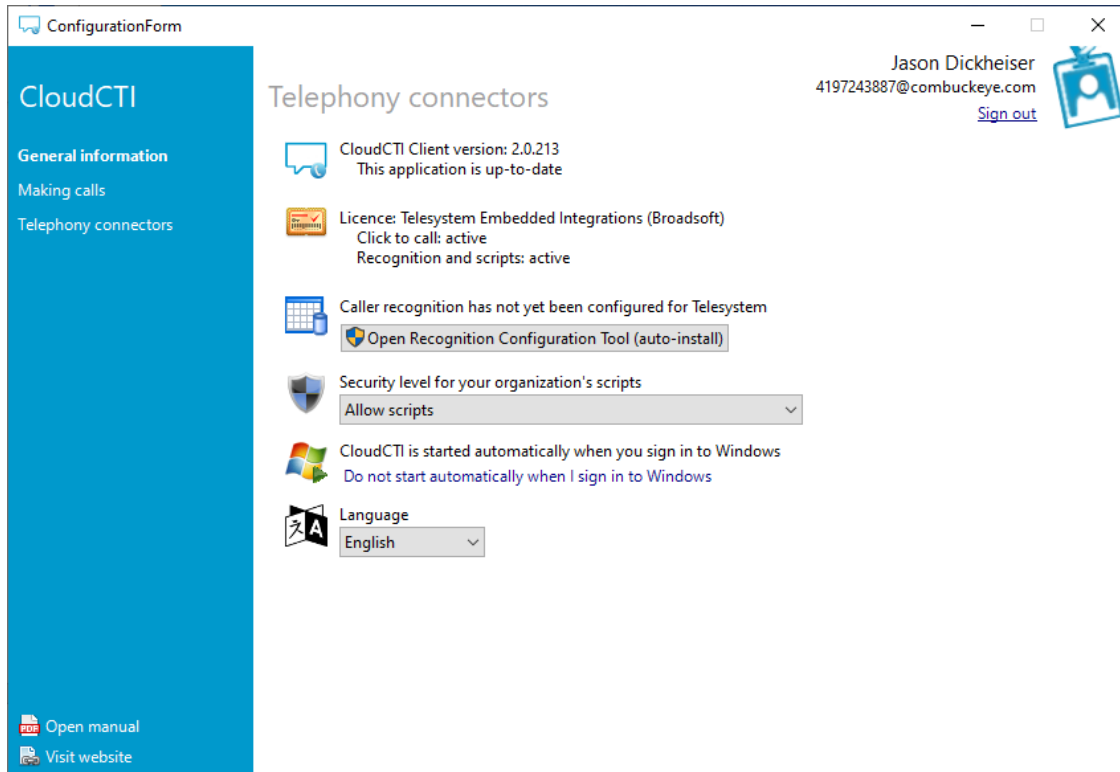
Password

Remember my credentials

Sign in

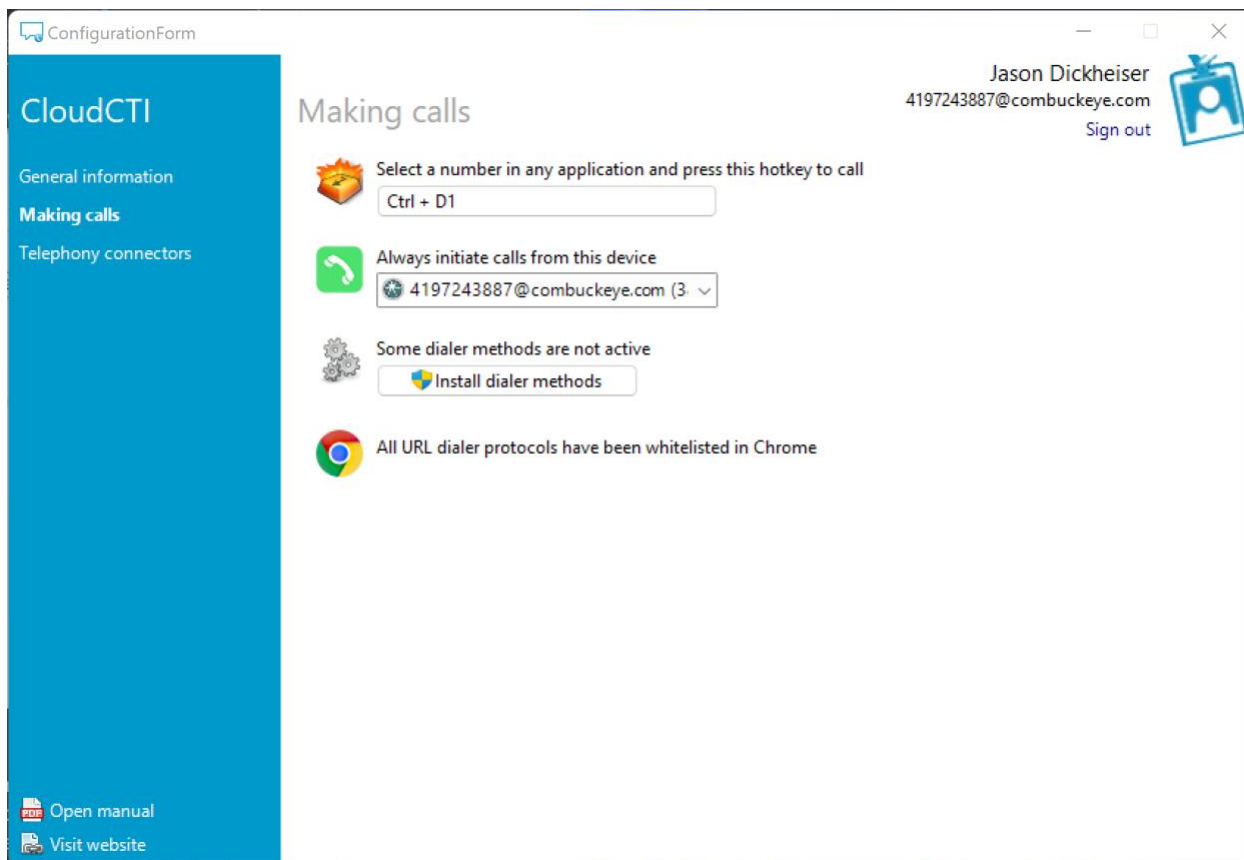
If you choose to keep the setting ‘Remember my credentials’ checked, this is only required once. If you do not have valid user credentials, please check with the primary administrator on your account or if you are the primary administrator, contact Telesystem Support.

Once you have signed in, the client will show the main configuration screen.



The **General Information** menu shows the following content:

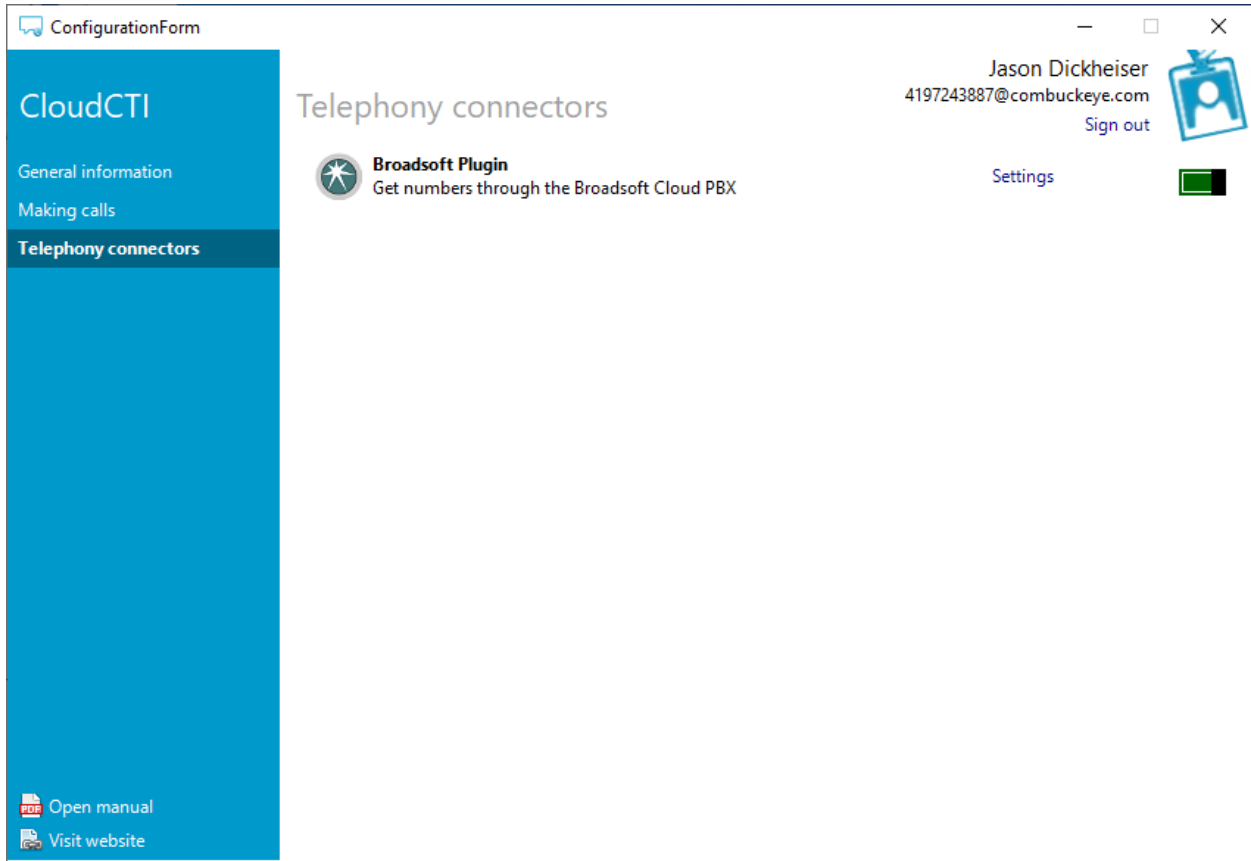
- Client version number
- Type of Integration License Assigned
- Caller Recognition Configuration
- Security Level for scripting – default option is to allow scripts. The drop-down allows you to disable scripts or to prompt you before a script is run.
- CloudCTI is standard automatically when you sign into Windows – click the available link to change this configuration which would require you to manually start the CRM integration application each time you restart the computer
- Language – Adjust the language used for the CRM Integrator application. Options include English, Dutch, and French



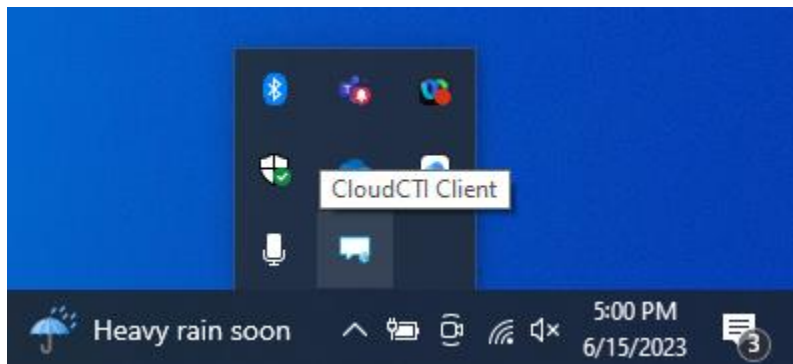
The **Making calls** menu shows the following options:

- Click-to-Call Hotkey Configuration – Under the label “Select a number in any application and press this hotkey to call,” use this field to enter the key on your keyboard you wish to use as the click-to-call hotkey. For example, you may wish to use the digit “1” as the hotkey. The client will automatically add the “Ctrl +” here so that when you wish to utilize click-to-call feature, highlight the phone number on the website or application and then on your keyboard you would press “Ctrl” + “1” at the same time to initiate the call.
 - Click-to-dial functionality can be used right away. The ‘caller recognition’ and ‘screen pop’ should be configured centrally for the whole organization by a system administrator.
- Select device to make calls – Under the label “always initiate calls from this device” there should be a drop-down option to select either “Use the first available device, or an option to specify your Telesystem hosted phone line. It is recommended that you select the configured phone line. If there are any additional options available, these would indicate other calling applications you have configured outside of your Telesystem phone service. These additional options cannot be supported by Telesystem.
- Install Dialer Methods – This option is not required for use with your Telesystem Hosted Phone Service. Out dialed calls should be made with the Click-to-Call configuration.

The **Telephony connectors** menu allows you to verify the status of the connector, which should be green as shown below.



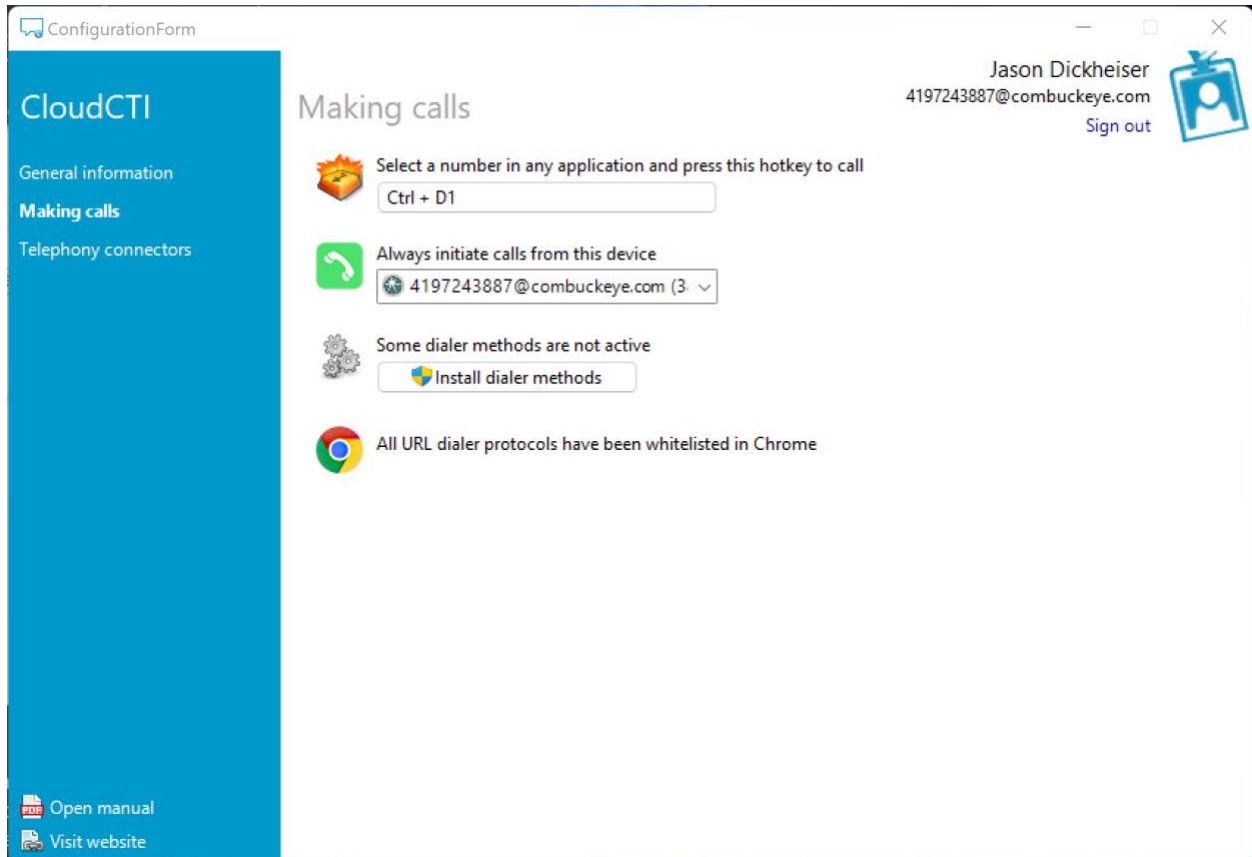
If everything is up and running, the client can be minimized to your system tray. Since Windows 7, newly installed system tray icons are, by default, hidden from view. It will show up if the client has relevant information, such as when a new call arrives.



Using ‘Click-to-call’

Under the label “Select a number in any application and press this hotkey to call,” use this field to enter the key on your keyboard you wish to use as the click-to-call hotkey.

For example, you may wish to use the digit “1” as the hotkey. The client will automatically add the “Ctrl +” here so that when you wish to utilize click-to-call feature, highlight the phone number on the website or application and then on your keyboard you would press “Ctrl” + “1” at the same time to initiate the call.



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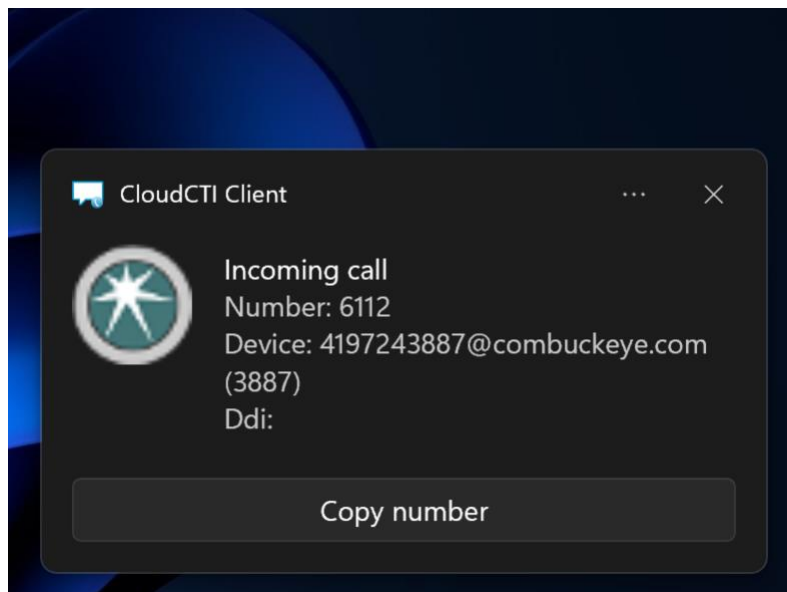
To initiate a click-to-call, any number you can highlight with your mouse cursor can be dialed by simply highlighting the phone number then using the hotkey sequence that is configured in the client settings under the “Making calls” section. Do not worry if a few extra characters are highlighted. The client translates the number into a dialable format, automatically excluding accidental letter characters.

When the click-to-call is initiated, the system will call your number first to initiate the call, once you answer your phone, the call to the other party will then be initiated.

Using 'Caller Recognition' and 'Screen Pop'

On an incoming call, the connector signals the client to show a notification balloon. In Windows 10, such a notification is by default shown for 5 seconds (although this system setting can be changed). If you want to click a button on the notification you are not required to do so immediately.

If you click the tray icon, it simply repeats the last notification. If a caller's number is not recognized the standard balloon is used as shown with the 'copy' button. This button copies the caller's number to the clipboard which can be convenient if you decide to add the caller to your CRM application so the number will be recognized the next time.



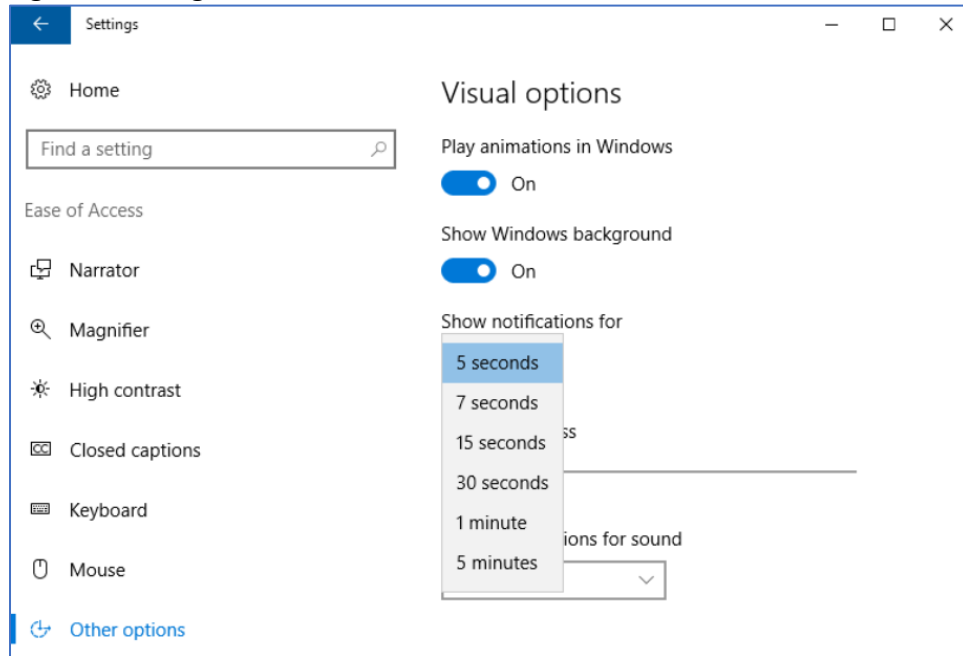
Caller recognition is configured by a system administrator using the Recognition Configuration Tool. This tool can be used to configure what contact information should be shown in the notification balloon. The tool allows the configuration of multiple 'screen pop' scripts, and with most pre-configured CRM applications the notifications have a 'Show Contact' button which activates the caller's info page within the specific CRM application.

Common Tasks

How to increase the time a notification is displayed

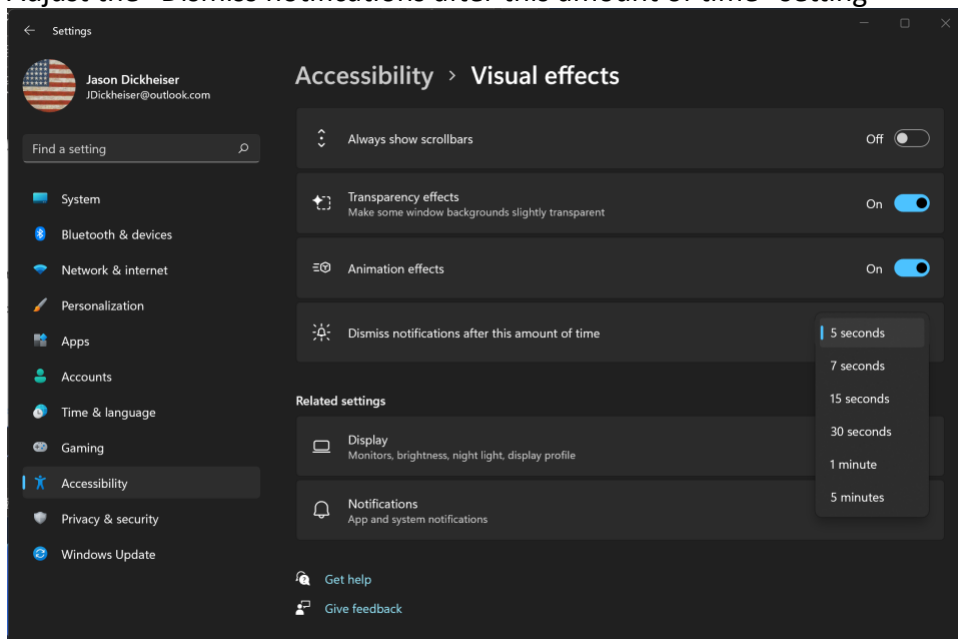
In Windows 10:

1. Go to **Settings > Ease of Access > Display**
2. Change the setting for 'Show notifications for.'



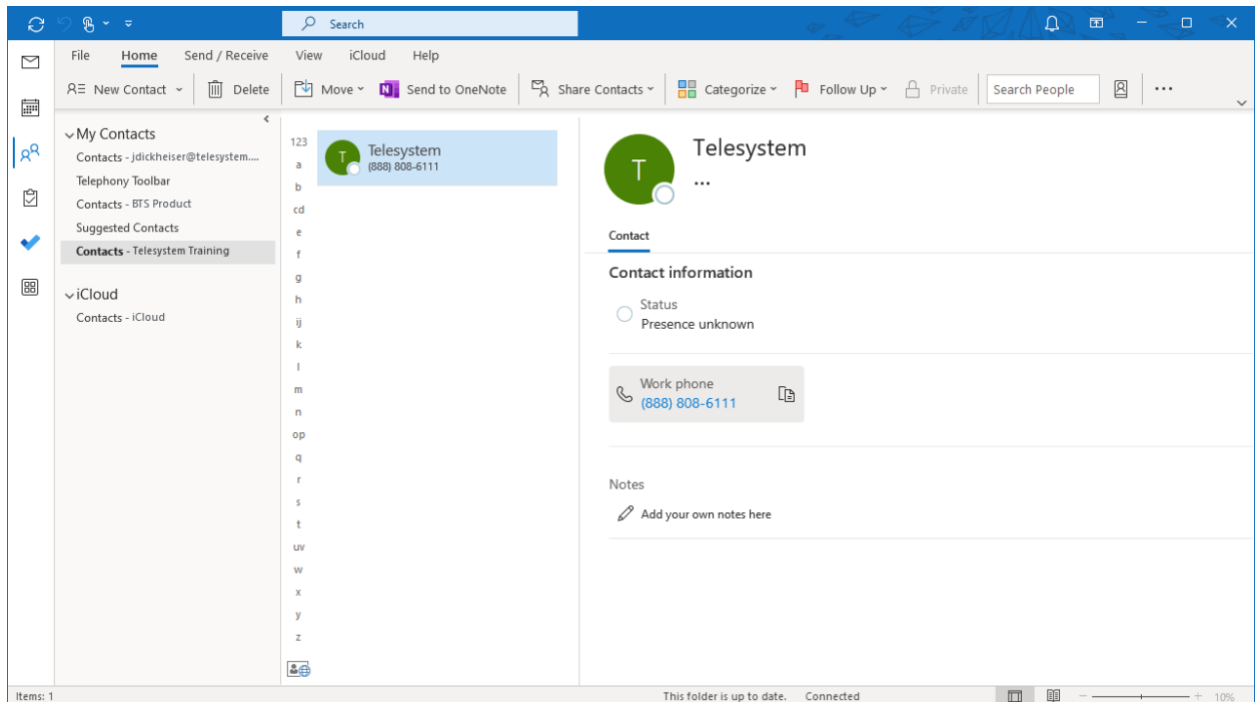
In Windows 11:

1. Go to **Settings > Accessibility > Visual Effects**
2. Adjust the "Dismiss notifications after this amount of time" setting



How to call a contact from Outlook

1. Locate the contact you wish to call in your Outlook Contacts
2. Mouse over the phone number of the contact



How to copy the number of the last call if the number was not recognized

1. Click the CloudCTI Client tray icon to bring back the last notification.
2. Click the 'Copy' button. The caller's number is now copied to the clipboard.
3. To test, open notepad and press CTRL-V.

How to log in with a different user

1. Right-click the CloudCTI Client tray icon and select 'Configure.'
2. In the top-right, click 'Sign Out.'
3. Enter the different user credentials and press 'sign in.'

How to use another display language

1. Right-click the CloudCTI Client tray icon and select 'Configure.'
2. In the General section, choose another language.