

CRM Integrator with CloudCTI



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

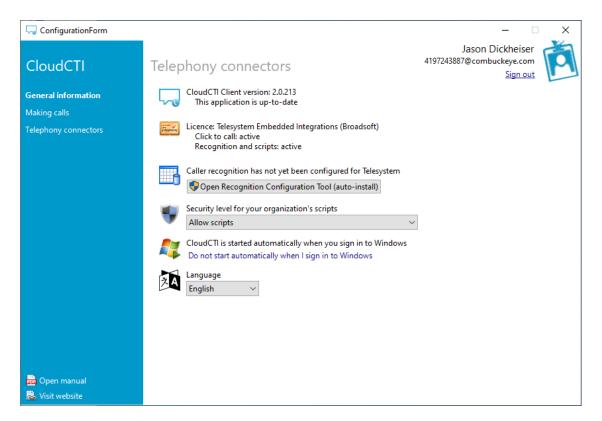
The first time the client starts, you need to sign in using your credentials.

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.

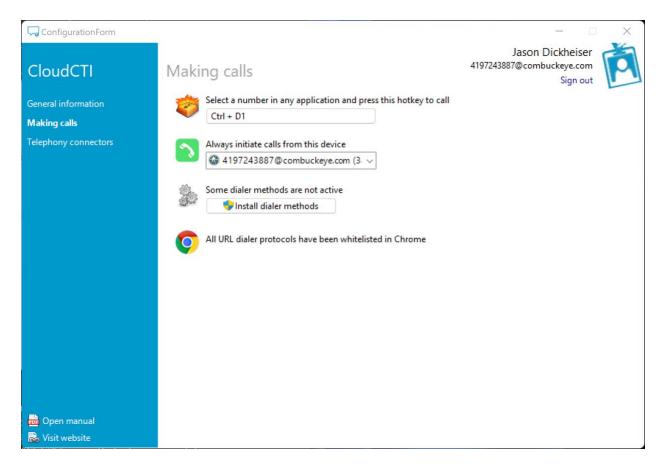
Sign in Enter your CloudCTI credentials		
	Email	
		\exists
	Password	
Remember my credentials		
Sign in		

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



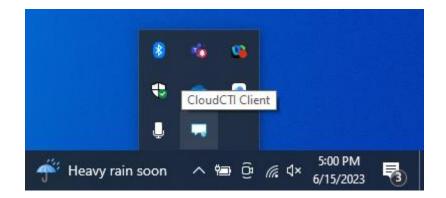
The **Making calls** menu shows the following options:

- 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.

🤜 ConfigurationForm			×
CloudCTI	Telephony connectors	Jason Dickheiser 4197243887@combuckeye.com Sign out	P
General information Making calls	Get numbers through the Broadsoft Cloud PBX	Settings	
Telephony connectors			
📅 Open manual			
Visit website			

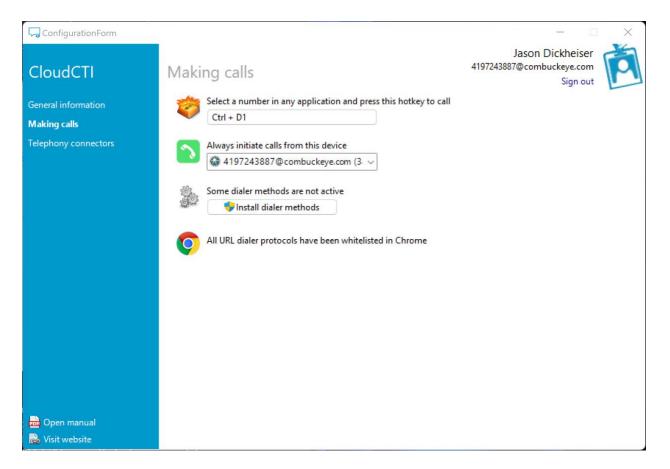
If everything is up and running, the client can be minimized to your system tray. Since Windows 7, newly installed system tray icons are, by default, hidden from view. It will show up if the client has relevant information, such as when a new call arrives.



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.



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.

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.

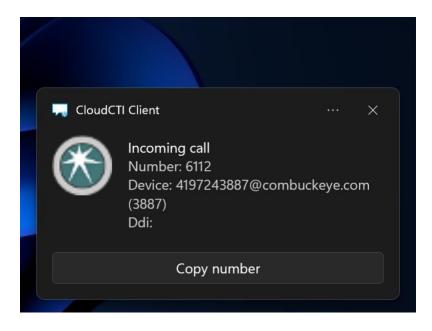
When the click-to-call is initiated, the system will call your number first to initiate the call, once you answer your phone, the call to the other party will then be initiated.



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.'

← Settings		-	×
Ø Home	Visual options		
Find a setting $ ho$	Play animations in Windows		
Ease of Access	On On		
Ease of Access	Show Windows background		
명 Narrator	On		
⊕ Magnifier	Show notifications for		
☆ High contrast	5 seconds 7 seconds		
Closed captions	15 seconds ⁵⁵		
📼 Keyboard	30 seconds 1 minute ions for sound		
() Mouse	5 minutes		
🕁 Other options			

In Windows 11:

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

← Settings		– o x
Jason Dickhe		
Find a setting	Always show scrollbars	Off •
System	Transparency effects Make some window backgrounds slightly transparent	On 🔵
8 Bluetooth & devic Retwork & internet		On 🧰
 Personalization Apps 	诀: Dismiss notifications after this amount of time	5 seconds
Accounts	Related settings	7 seconds 15 seconds
 Time & language Gaming 	Display Monitors, brightness, night light, display profile	30 seconds 1 minute
I ★ Accessibility I Privacy & security	Q Notifications App and system notifications	5 minutes
 Windows Update 		
	 Get help Give feedback 	

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

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\square	File Home Send / Receive	View iCloud Help	
	R∃ New Contact ~ 🛄 Delete	🔄 Move 🖌 🚺 Send to OneNote 🦻 Sh	are Contacts * 🗧 Categorize * 🏴 Follow Up * 🛆 Private Search People 🛛 🖓 \cdots 🗸
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Items: 1		<u>*</u>	This folder is up to date Connected TT DB + 1055

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.