

Business Voice

Cloud

CRM Connector

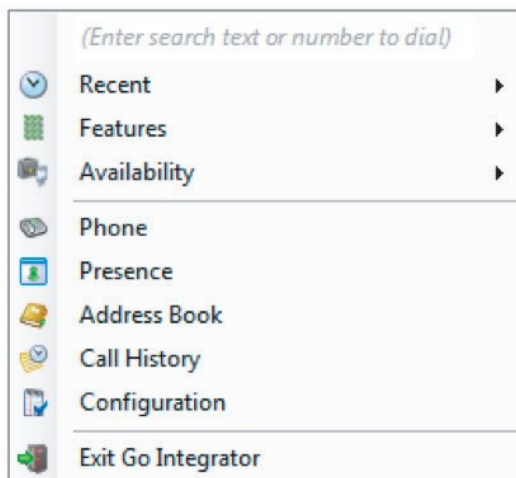
User Guide



Welcome to CRM Connector. This quick reference guide contains some useful information to help you get started. The CRM Connector runs in the system tray. It will appear as a green (or another color) circle. This document describes the various screens that can be accessed by right-clicking on the tray icon.

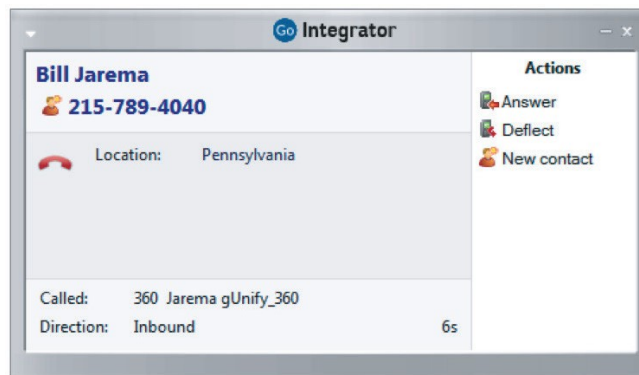
TRAY MENU

- » **Quick dial box:** Type the number to dial or enter the name to find contact details.
- » **Recent menu:** Quickly see recently dialed numbers, and click to redial them.
- » **Features:** Setup Do Not Disturb (DND) and Call Forwarding on your extension.
- » **Availability menu:** Select your CommPilot Express profile.
- » **Configuration:** Contains options to change your user experience, and configure CRM packages to integrate with.
- » **Exit:** Use this to unload the software.



PHONE WINDOW

- » When you are on a telephone call, the software will show information that is known about the person you are speaking to and a list of actions that you can perform.
- » When you are not on a telephone call, typing numbers on this window will allow you to dial.
- » **Contact information:** The name and telephone number of the remote person.
- » **Actions:** Use these buttons to interact with the current call and contact.
- » **Call information:** Other information about the current call.



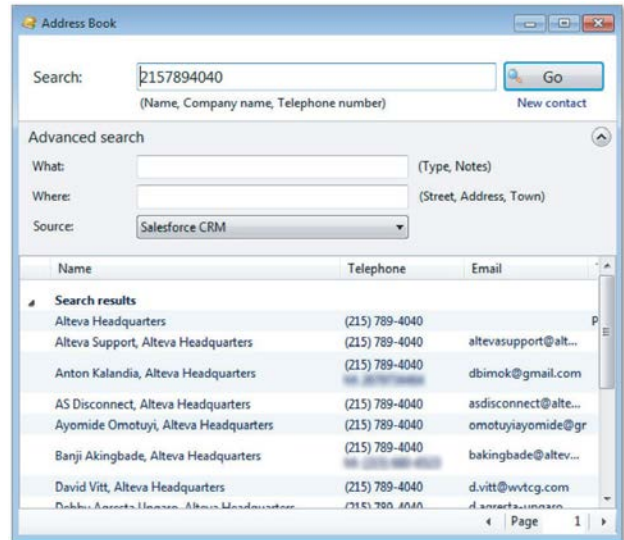
PREVIEW WINDOW

- » By default the preview window is set to appear when calls happen. The window will fade away after a few seconds.
- » **Close button:** Use this to make the Preview window disappear more immediately.
- » **Contact information:** The telephone number and name of the other party.
- » **Call control actions:** Use these to interact with the call or show the contact if it is found in an address book.



ADDRESS BOOKS AND CONTACTS

- » The Address Book window provides access to a personal address book as well as any integrated address books that have been configured. You can either click the 'New contact' button to add a contact for future use, or type in search criteria and press 'Go' to look for existing contacts.
- » Clicking on the name in the search result area will show the contact in more detail.
- » Clicking the telephone number will make a call to the contact.
- » Clicking the email address will create a new email to the contact.



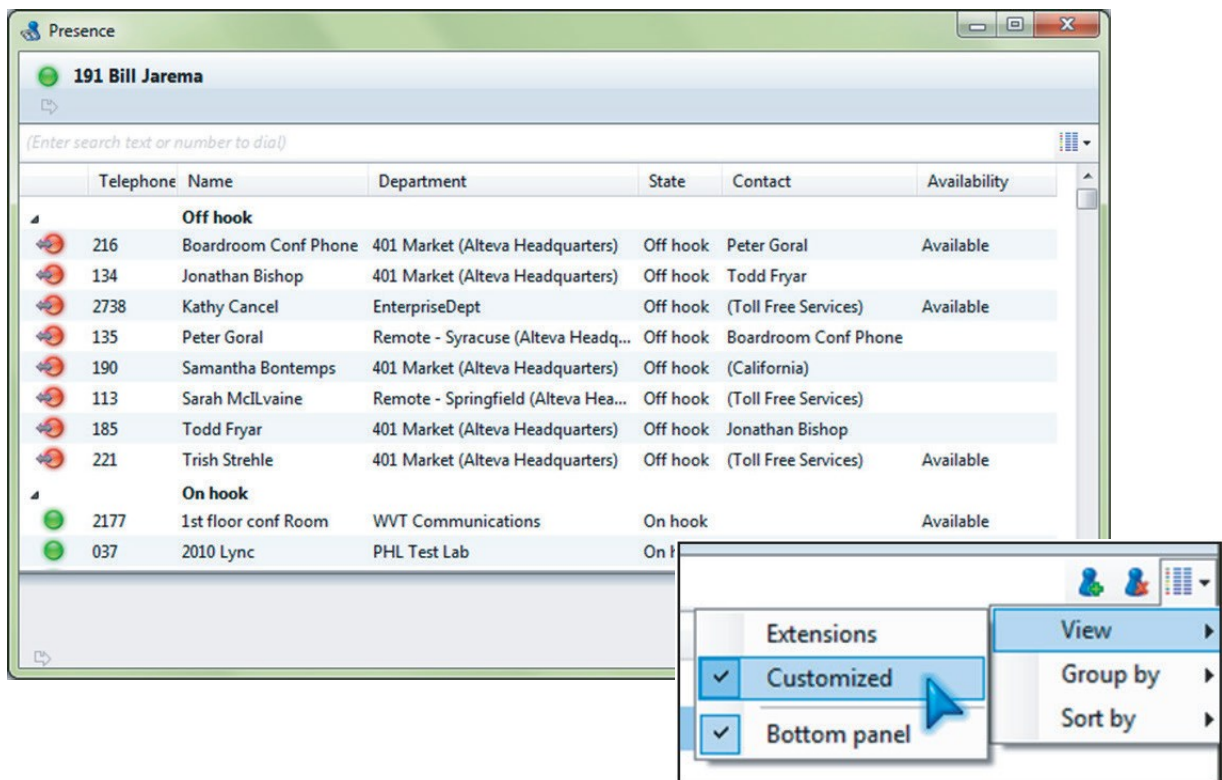
CALL HISTORY

- » The Call History window shows your fifty most recent calls, arranged in reverse date and time order. The next fifty can be accessed by pressing the page right button in the bottom right of the window.
- » You can make calls from this window by clicking on the contact's telephone number and you can add or edit their name by clicking on the entry in the Name column.
- » The arrow in the left hand column shows whether the call was made by you or received by you, and whether or not it was answered.



PRESENCE WINDOW

- » The Presence window provides a quick way to check the status of your colleagues. The Presence window shows a list of all the extensions. If you start to type in the search box, the list will show only extensions that match what you typed.
- » If you right-click on one of the entries in the Presence list, a context menu will appear. This context menu contains a list of actions that you can perform with the extension including calling, consulting and transfer; the available actions depend on the state of the extension.



NOTE: If the default presence list contains more than thirty extensions it is advised to set up a customized list. In cases of very large companies (hundreds of extensions) the default presence window could take upwards of 60 second to update when it first opened.