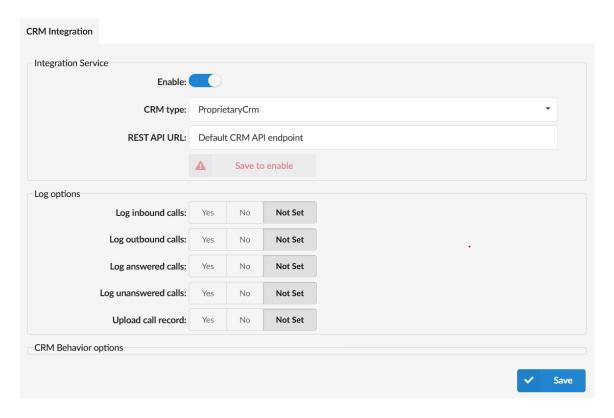
# Communicator — Proprietary CRM with your PBX system.

# **PBX Configuration**

## Step 1: Open the CRM Integration Settings

- 1. Login to ux.firelinecommunications.com or your systems pbx domain.
- 2. Go to CRM Integration Service in your
- 3. Locate the **Enable/Disable** toggle switch.



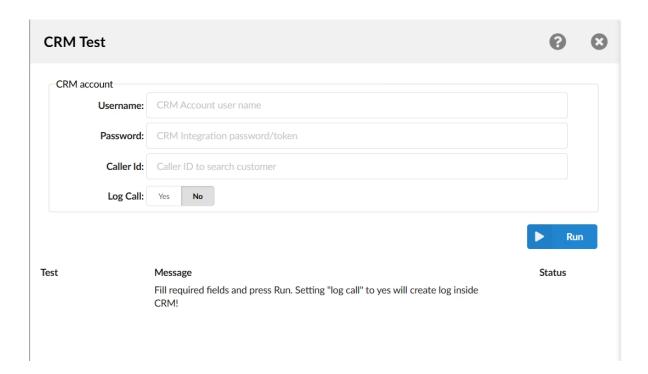
4. Click the toggle to turn the service **ON**. (The button will switch between "On" and "Off.")

#### Step 2: Select the CRM Type

1. In the **CRM Type** dropdown menu, select **ProprietaryCRM**. (This option is used when customers want to connect

# Step 3: Enter Your API Information

- 1. In the Rest API URL field, type your CRM's API URL.
  - 1. Example: https://exampleurl.com
  - 2. Once all required fields are filled in, a "Save to enable" button will appear.
- 2. Click **Save** to apply your settings.



- 3. A New window will appear to the left. In the window, enter the following:
  - 1. Username: Your CRM account username
  - 2. Password: Your CRM account password
  - 3. Caller ID (optional): Use this to test customer lookups by phone number

- 4. Log Call: Choose Yes to log the test call inside your CRM
- 4. When finished, click Run to start the test
  - 1. If everything is set up correctly, you'll see confirmation that the connection works.

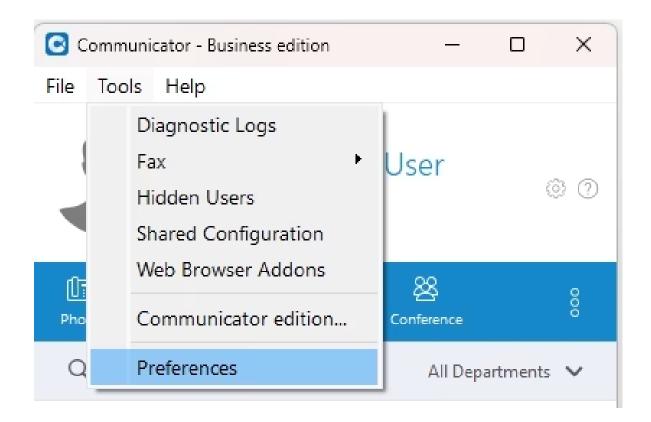
### Step 5: Configure Log Options (Optional)

You can choose what types of calls are automatically logged to your CRM.

- 1. Go to Log Options under CRM settings.
- 2. Choose Yes, No, or Not Set for each of the following:
  - Log inbound calls
  - Log outbound calls
  - Log answered calls
  - Log unanswered calls
  - Upload recordings

# **Communicator Configuration**

Step 1: Log into Communicator CRM Settings



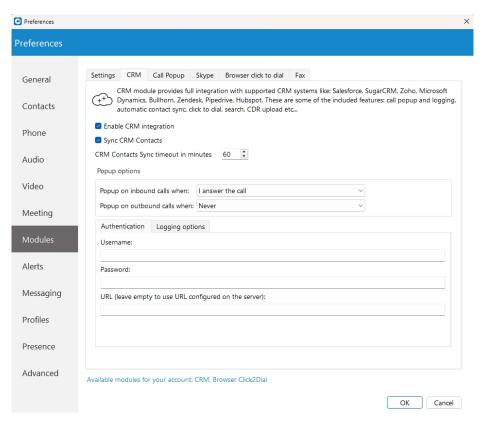
- 1. Select Tools
- 2. Select Preferences

#### Step 2: Enable CRM

- 1. Go to the Modules section
- 2. Select the CRM tab
- 3. Place a checkmark in Enable CRM Integration

### Step 3: Configure CRM Features

- 1. Place a checkmark in Sync CRM Contacts if you would like to synch your contacts with Communicator
- 2. Enter the Synchronization frequency for the contacts. Default is 60min or 1hr.
- 3. Popup Options
  - 1. Popup Inbound calls when:
    - 1. I answer the call
    - 2. I receive a call
    - 3. Never
    - 4. Call is finished (if talk time was more than 5 minutes)



- 2. Popup on outbound calls when:
  - 1. Never
  - 2. Call is started
  - 3. Call is answered
  - 4. Call is finished (if talk time was more than 5 minutes)
- 4. Authentication Tab
  - 1. Username of CRM user
  - 2. Password of DCRM user
  - 3. URL (leave empty to use URL configured on the server):
- 5. Logging Option Tab
  - 1. Use settings from the server.
  - 2. Log inbound calls
  - 3. Log outbound calls
  - 4. Log answered calls
  - 5. Log unanswered calls
  - 6. Upload recordings
- 6. Select OK

\*\*\* The Proprietary CRM is a licensed feature that works with Communicator.