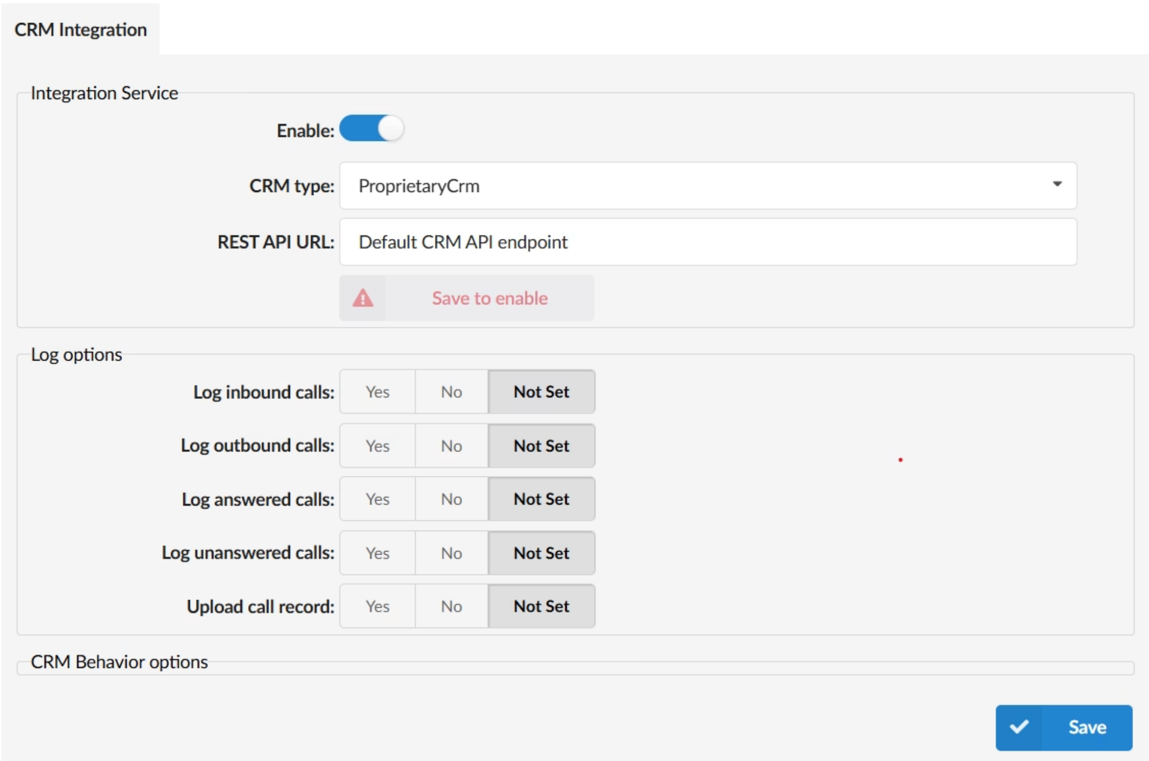
Communicator – Proprietary CRM

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

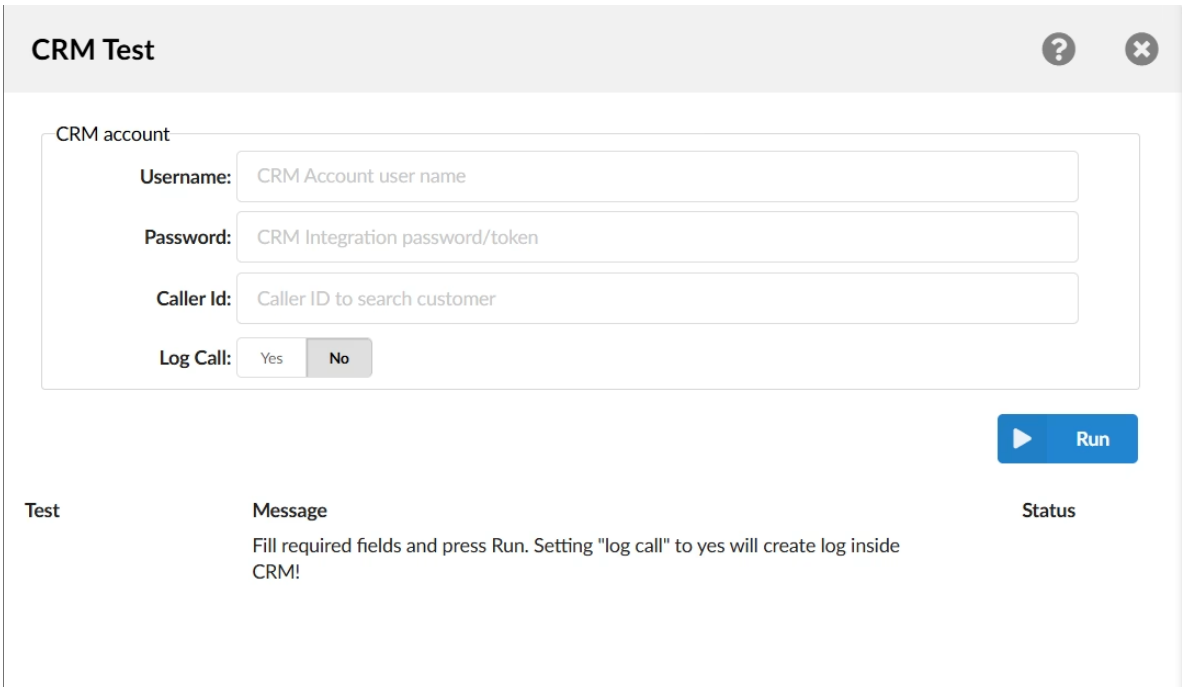
1. In the **CRM Type** dropdown menu, select **ProprietaryCRM**.
   (This option is used when customers want to connect

their own CRM system.)

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.

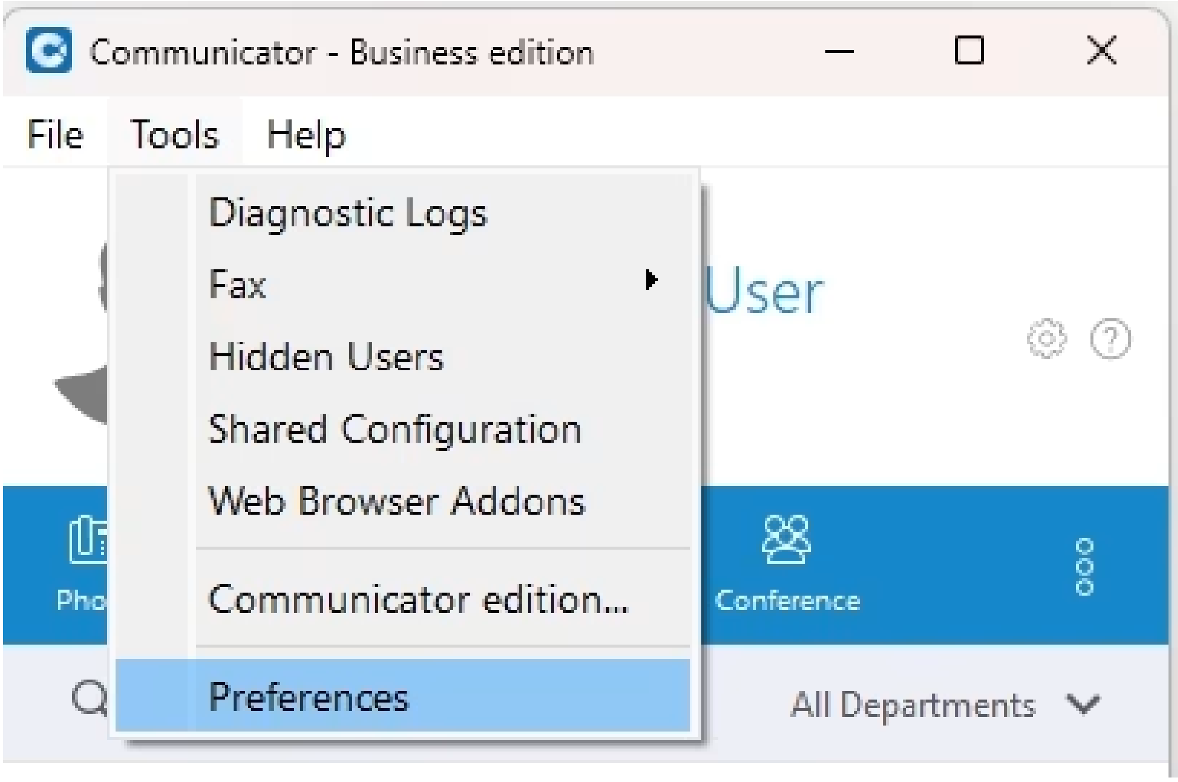
1. Go to **Log Options** under CRM settings.

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



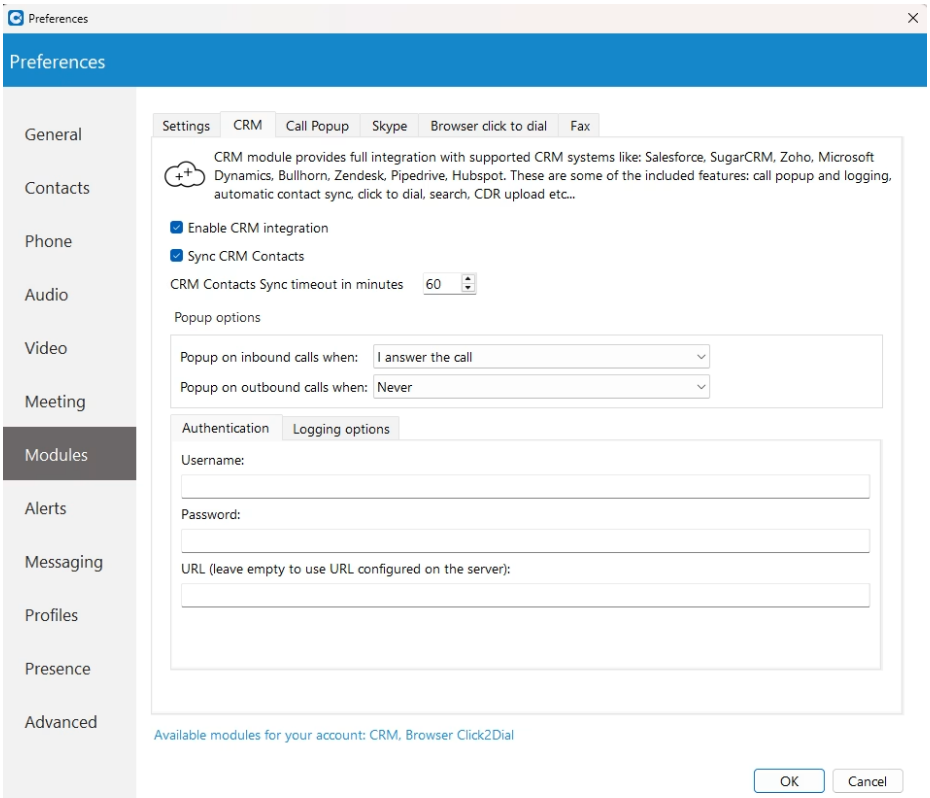
1. Select Tools
2. Select Preferences

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.