

# 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.

The screenshot shows the 'CRM Integration' settings page. It features a tab labeled 'CRM Integration'. Below it, the 'Integration Service' section contains an 'Enable' toggle switch (currently turned on), a 'CRM type' dropdown menu set to 'ProprietaryCrm', and a 'REST API URL' text field with the value 'Default CRM API endpoint'. A red warning icon and a 'Save to enable' button are positioned below these fields. The 'Log options' section contains five rows of settings, each with a label and three buttons: 'Yes', 'No', and 'Not Set'. The settings are: 'Log inbound calls', 'Log outbound calls', 'Log answered calls', 'Log unanswered calls', and 'Upload call record'. All 'Not Set' buttons are highlighted. At the bottom, there is a 'CRM Behavior options' section and a blue 'Save' button with a checkmark icon.

CRM Integration			
Integration Service			
Enable:	<input checked="" type="checkbox"/>		
CRM type:	ProprietaryCrm		
REST API URL:	Default CRM API endpoint		
	Save to enable		
Log options			
Log inbound calls:	Yes	No	Not Set
Log outbound calls:	Yes	No	Not Set
Log answered calls:	Yes	No	Not Set
Log unanswered calls:	Yes	No	Not Set
Upload call record:	Yes	No	Not Set
CRM Behavior options			
			Save

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.)*

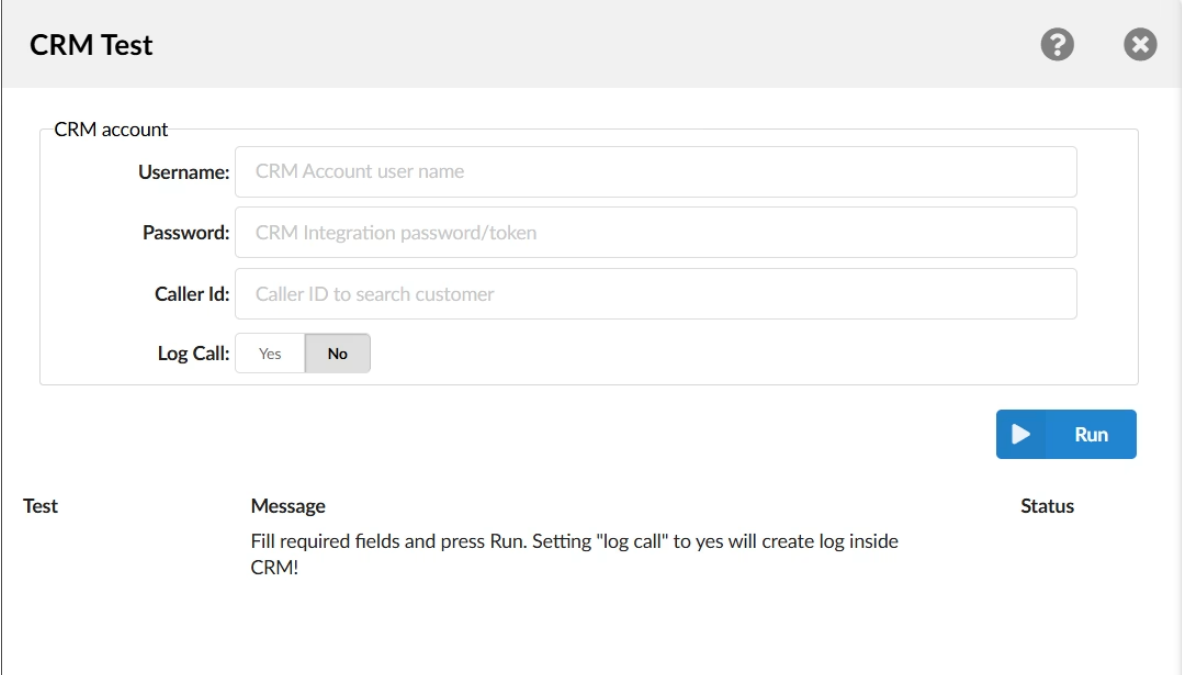
## Step 3: Enter Your API Information

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.



The screenshot shows a window titled "CRM Test" with a question mark and close button in the top right. Inside the window, there is a "CRM account" section with four input fields: "Username:" (placeholder: CRM Account user name), "Password:" (placeholder: CRM Integration password/token), "Caller Id:" (placeholder: Caller ID to search customer), and "Log Call:" with "Yes" and "No" radio buttons. A blue "Run" button with a play icon is located to the right of the "Log Call" section. Below the form, there is a table with three columns: "Test", "Message", and "Status". The "Message" column contains the text: "Fill required fields and press Run. Setting 'log call' to yes will create log inside CRM!".

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.

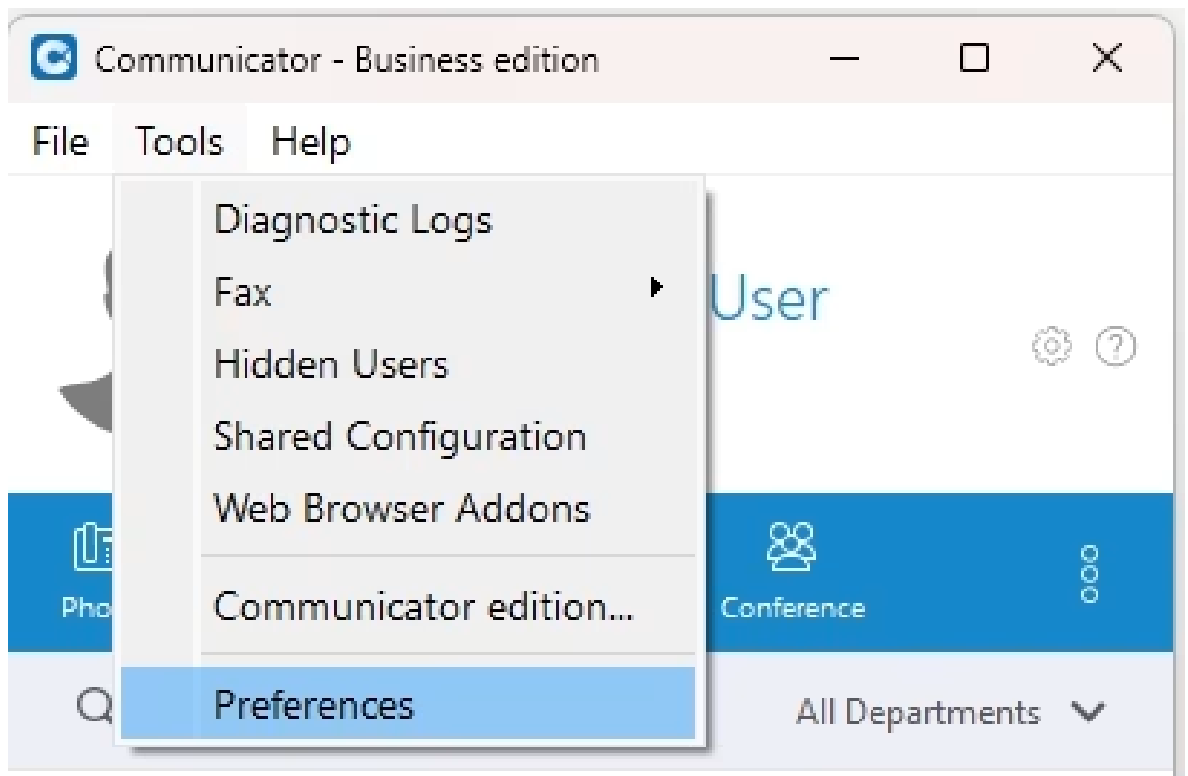
1. Go to **Log Options** under CRM settings.

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)

Preferences

General  
Contacts  
Phone  
Audio  
Video  
Meeting  
Modules  
Alerts  
Messaging  
Profiles  
Presence  
Advanced

Settings CRM Call Popup Skype Browser click to dial Fax

CRM module provides full integration with supported CRM systems like: Salesforce, SugarCRM, Zoho, Microsoft Dynamics, Bullhorn, Zendesk, Pipedrive, Hubspot. These are some of the included features: call popup and logging, automatic contact sync, click to dial, search, CDR upload etc...

☒ Enable CRM integration  
☒ Sync CRM Contacts  
CRM Contacts Sync timeout in minutes 60

Popup options

Popup on inbound calls when: I answer the call  
Popup on outbound calls when: Never

Authentication Logging options

Username:  
Password:  
URL (leave empty to use URL configured on the server):

Available modules for your account: CRM, Browser Click2Dial

OK Cancel

## 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.