

# Communicator – Proprietary CRM

## PBX Configuration

### Step 1: Open the CRM Integration Settings

1. Login to [ux.firelinecommunications.com](http://ux.firelinecommunications.com) or your systems pbx domain.
2. Go to **CRM Integration Service** in your
3. Locate the **Enable/Disable** toggle switch.

CRM Integration

Integration Service

Enable:

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.”*)

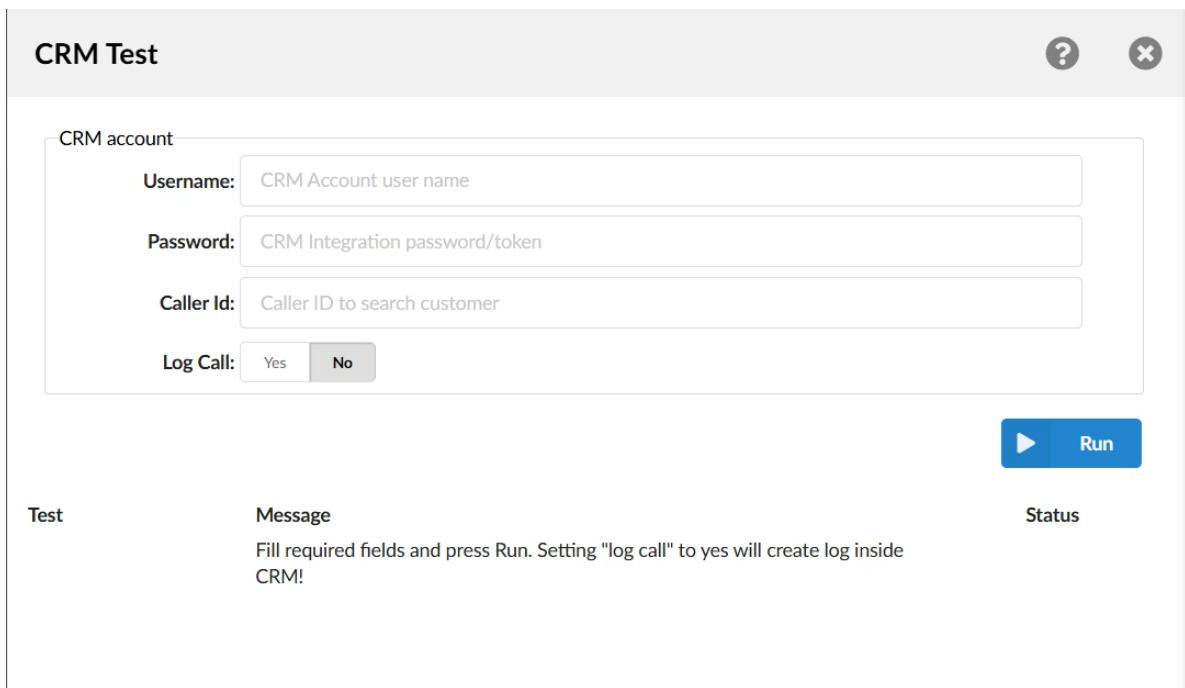
### Step 2: Select the CRM Type

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 configuration window titled "CRM Test". At the top, there are three buttons: a question mark icon, a close (X) icon, and a "Run" button. The main area is titled "CRM account" and contains four input fields: "Username" (CRM Account user name), "Password" (CRM Integration password/token), "Caller Id" (Caller ID to search customer), and a "Log Call" switch (with "Yes" and "No" options, where "No" is selected). Below this is a "Test" table with three columns: "Test", "Message", and "Status". The "Message" column contains the instruction: "Fill required fields and press Run. Setting 'log call' to yes will create log inside CRM!". The "Status" column is currently empty.

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.

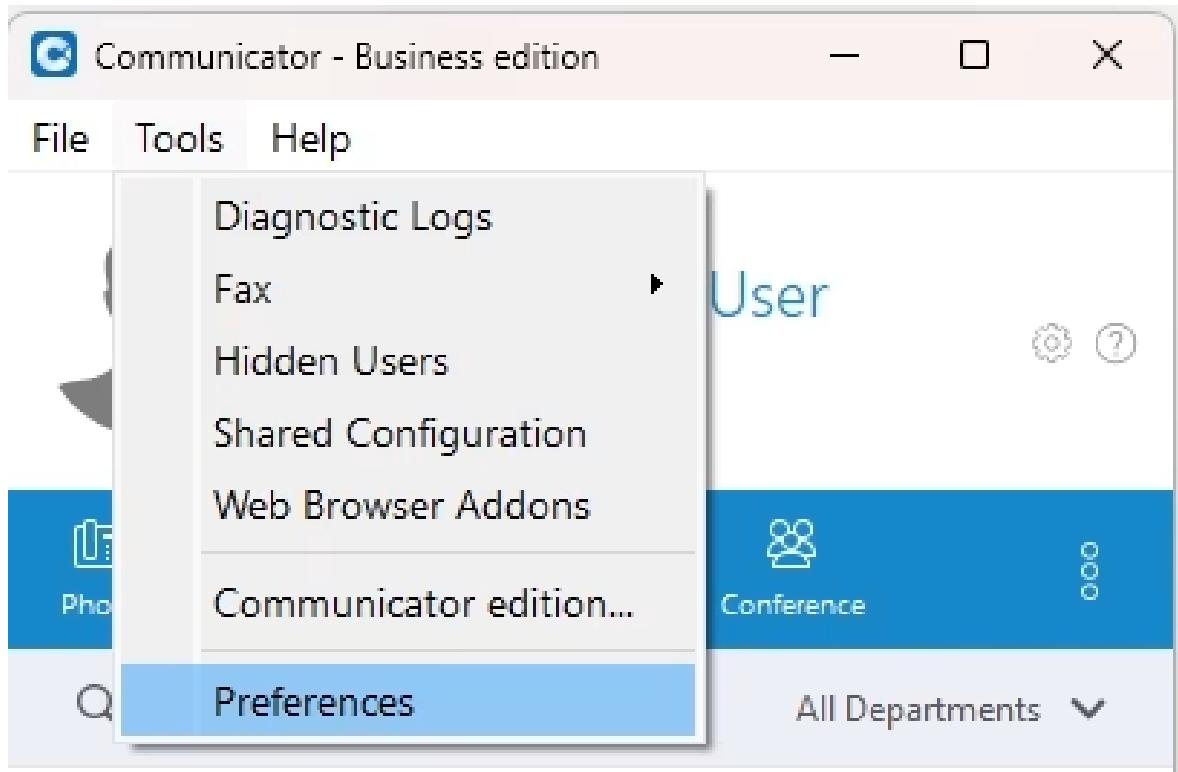
## **Step 5: Configure Log Options (Optional)**

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**



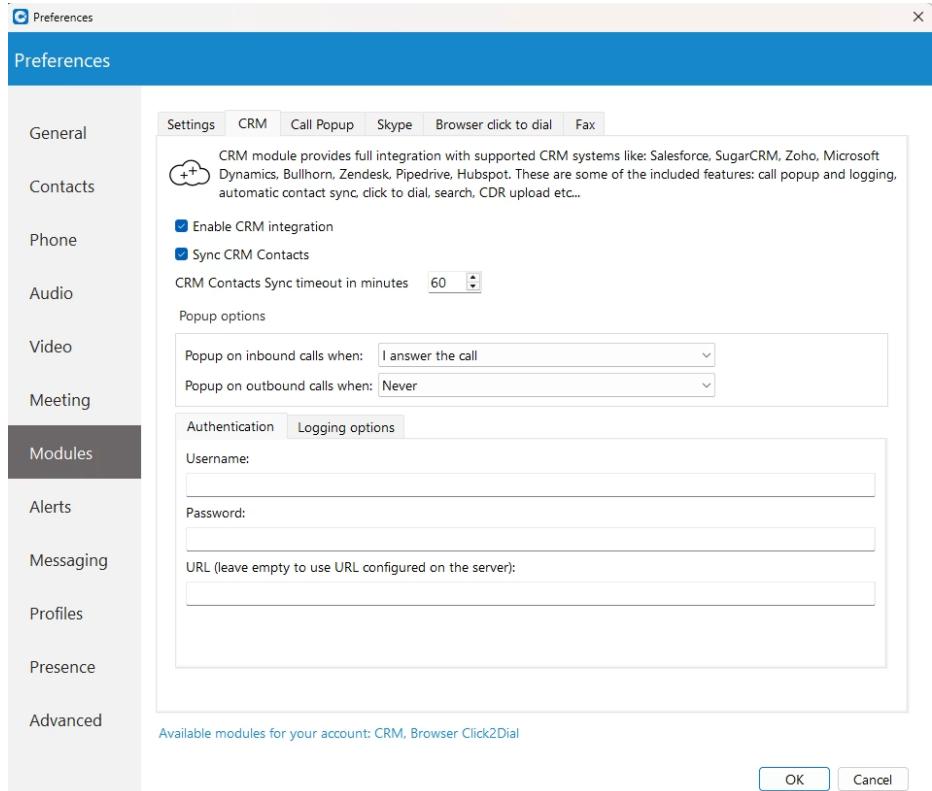
1. Select Tools
2. Select Preferences

## 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 sync 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.