CRM INTEGRATION
User Guide
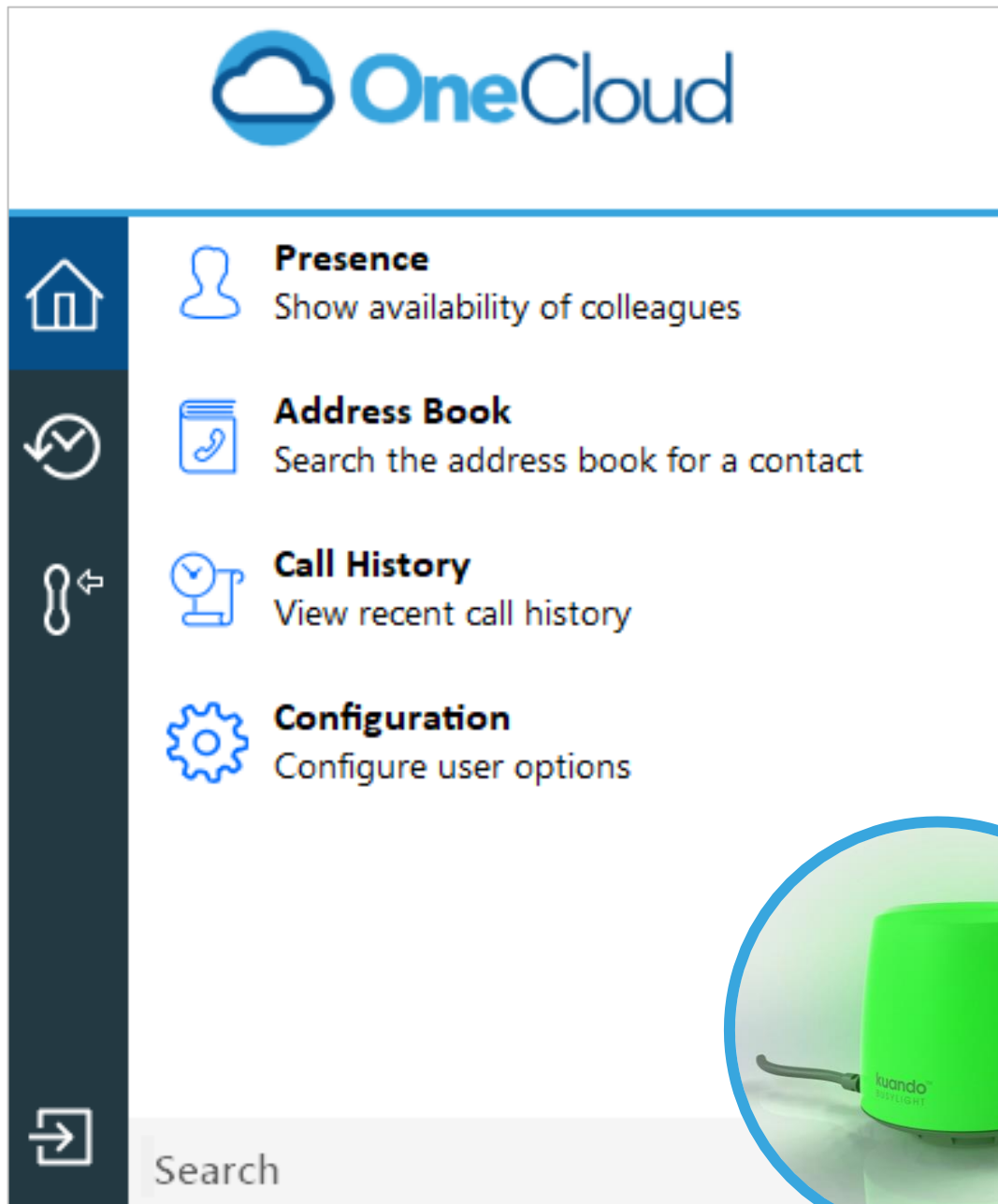
OneCloud

Presence
Show availability of colleagues

Address Book
Search the address book for a contact

Call History
View recent call history

Configuration
Configure user options

Search

CRM Integrator User Guide

Welcome to the OneCloud CRM Integrator user guide. This document has been designed to help familiarize you with the basic button layout of the desktop application, as well as guide you through the options, and some advanced features the OneCloud CRM Integrator has to offer.

Getting Started

INSTALLING THE SOFTWARE

When you first install OneCloud CRM Integrator, it takes you through an installation phase where you need to tell it your OneCloud CRM Integrator Access Code and your OneCloud login credentials or extension number. When it does this, it presents the Telephony settings page of the Configuration window.

NOTE: Select 'Auto login' to prevent entering user credentials again.

NAVIGATING THE SOFTWARE

HOME 1

Selecting the home button brings the main menu functions into focus. Main Menu options include Presence, Address Book, Call History, and Configuration.

RECENT CALLS 2

View the most recent calls. Recent calls can be dialed by selecting the phone number
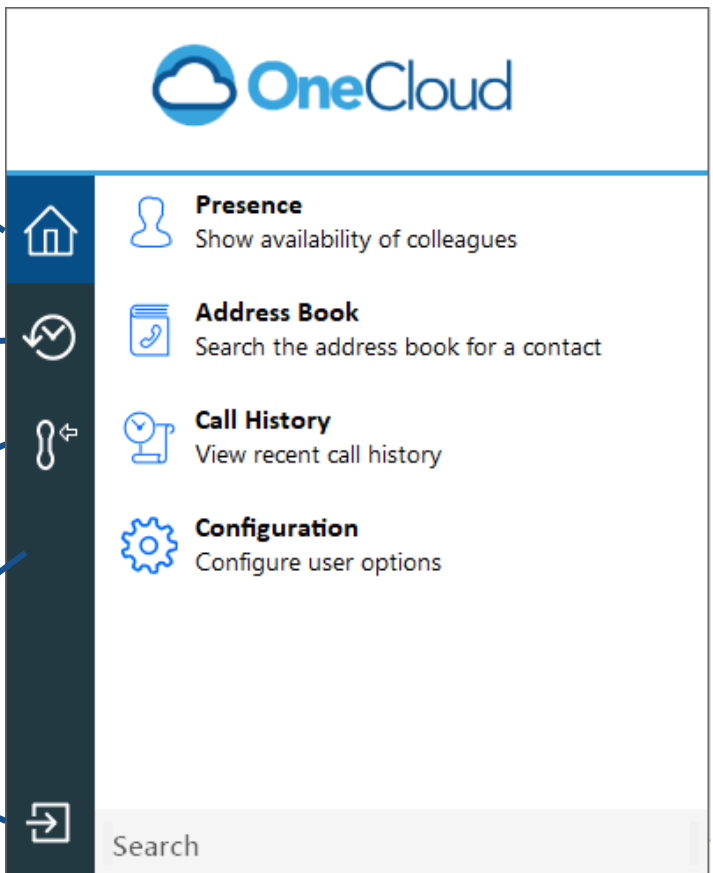
PREFERRED DEVICES 3

Select your preferred device from the drop-down menu.

DIAL PAD 4

Use the dial pad to place an outbound call.

EXIT 5

Use the Exit button to **Log out** or **Exit** the OneCloud CRM Integrator. If you Exit the software, you will not receive notifications on your PC.

OneCloud

Presence
Show availability of colleagues

Address Book
Search the address book for a contact

Call History
View recent call history

Configuration
Configure user options

Search

6

SEARCH

Search for a number or contact name directly from the Tray menu. Selecting a phone number in the search places an outgoing call.

TelWare

Presence

The **Presence** window provides a quick way to check the availability of your colleagues and call your colleagues using your preferred device.
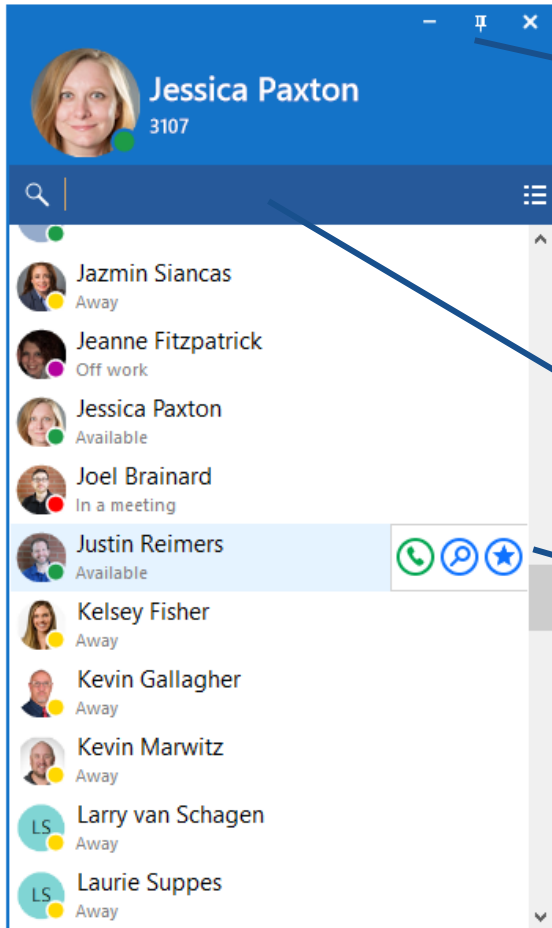
1 PIN

Pin your presence window to always be visible on the side of your display. Change the side it's displayed in the configuration. The window can be resized it fit your needs.

2 SORT AND GROUP

Sort and group your colleagues for easy navigation.

3 SEARCH

Search for a number or contact name. Selecting a phone number in the search places an outgoing call.

4 HOVER MENU

USER STATUS

A user's current call status is indicated by the color of the icon.

🟢 Available   🔴 Busy   ⚪ Offline   🟡 Held   🔴 Do Not Disturb   🔵 Forward

HOVER MENU

Hovering the mouse cursor on a contact will display the context menu.

📞 **CALL** | Call the contact.

🔍 **SEARCH** | Select the search icon to show more details about the contact.

⭐ **FAVORITE** | Add the contact to your favorites.

💬 **CHAT** | Send a chat to the user in Microsoft Teams. (This option only displays if turned on in Configurations.)

Active Call Options

INCOMING CALL OPTIONS

On an incoming call, a preview window presents an information summary when a call is made or received. Hover the mouse over the tray menu icon to show the preview *window.* When receiving an incoming call, the soft keys will display the following options. *NOTE: The Preview window is hidden after 10 seconds by default.*

Press **Answer** to answer the call on your preferred device.

Deflect transfers a call directly to another extension without answering it.
Select Deflect, enter the extension or phone number, then select the green check.

CALL CONTROL OPTIONS

Once on an active call, the following call controls will be available:

The **hang-up** button ends the call.

The hold button pauses the call. The other party will hear hold music.

When you have a call on hold, the hold button changes to a resume button. Select it to resume the call. *NOTE: The hold button is not utilized for transferring calls*.

TRANSFER

With a call connected, two different transfer options are available:

BLIND | To send the caller to another extension or 10-digit number without speaking to the receiving party first, Press the **Transfer** soft key, dial the extension or 10-digit number, and press the **B Transfer** soft key.

CONSULT | To send the caller to another extension or 10-digit number after confirming with the receiving party first. Press the **Transfer** soft key, dial the extension or 10-digit number, and press **Send**. Once the receiving party confirms, then press the **Transfer** soft key.

MULTIPLE CALLS
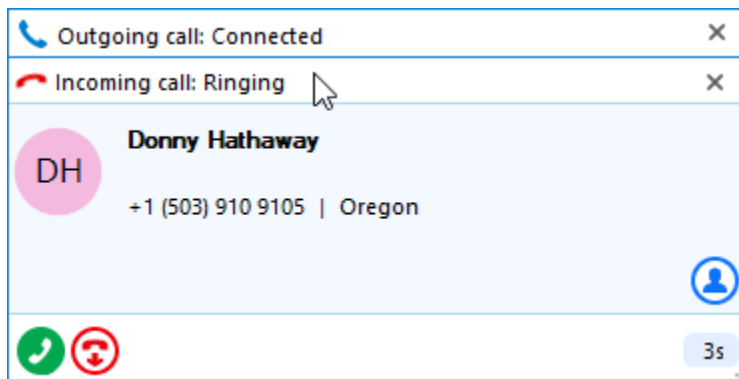
The preview windows will be stacked, with the active call in the front.
Select the header from the inactive preview window to put it into focus.

Integrations

Integrations connect a CRM or application with the telephone platform. Oncoming or outgoing telephone numbers are matched to a contact record in a CRM. This enables features such as Contact Popping and Address Book Search.

ADD A CRM INTEGRATION

1. Navigate to the Configuration window.
2. Select **(Add new)** to add a new CRM integration.
3. **Choose** the desired application from the list and select **Set**.
   NOTE: Only Standard Integrations will appear in the list. After completing the configuration steps, select Save.
4. **Check** the connection status of the integration.
5. **Test** search by selecting 'Test', enter the contact number, then select Search.
   NOTE: Test search may be unavailable with certain CRMs or applications.
6. Depending on your CRM, you may have additional settings and options. In the example below, Salesforce integration allows you to set up objects, caching, and activities.
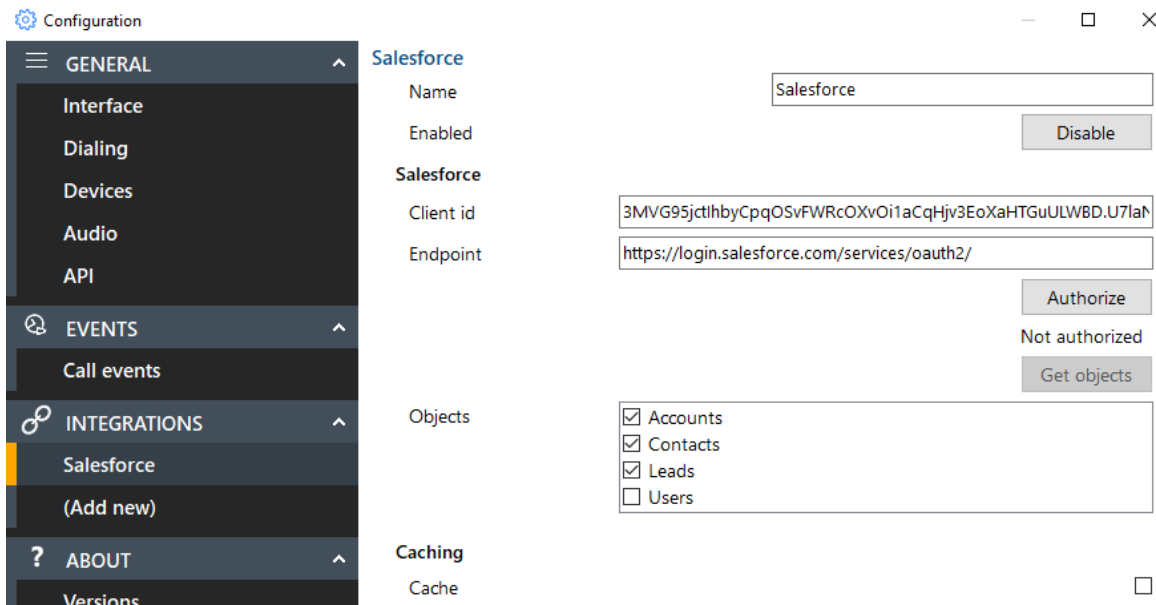
BUSYLIGHT INTEGRATION

The OneCloud Desktop Integration has plug-and-play compatibility with Kuando Busylight so everyone in the office can see whether a colleague is available for a conversation, is busy on the phone, or simply does not want to be disturbed.

CRM INTEGRATION COLOR	EXTERNAL LED COLOR
Available (not on a call)	Green
Held	Fast flashing yellow
Busy (on a call/online meeting)	Red
Ringing	Flashing red
Do Not Disturb / Forward	Blue

Common Settings

We'll cover some settings below to get you started with the most common settings.

USE TEAMS FOR PRESENCE

This setting will change your presence in the app (and busy light if applicable) when your Teams status changes.

1. Press **Configurations.**
2. In the Configurations pop-up window, select **Devices**.
3. Check the box labeled "**User for presences (beta)**" Under the Microsoft Teams header.
4. Another pop-up will appear.
5. Log in to your Microsoft Account.
6. Hit **Save.**

HOTKEYS

To set up hotkeys, go to **Configurations**, then **Interface**. You can set hotkeys to make, answer, and hang up calls.

SOFTPHONE AUDIO SETTINGS

If you plan to use the built-in Softphone to make and receive calls, verify your **Audio** settings are set up how you'd like them. *NOTE: Use this feature only when the desired device is not auto-detected by default. Do not change the other settings without consulting your admin or TelWare support.*

MICROPHONE | Select the preferred device and move it to the top of the list.

SPEAKER | Select the preferred device and move it to the top of the list.

RINGER | Select the preferred device and move it to the top of the list.

PREFERRED DEVICE

Verify the CRM Integrator is set to use your preferred device. Options will include any hardware phones, softphone, and Microsoft Teams (if applicable.)

SHOW AVATARS

To display profile photos from OneCloud, you must enable Gravatar on your app.

1. Press **Configurations.**
2. In the Configurations pop-up window, select **Devices**.
3. Check the box labeled "**Use Gravatar**" Under the Public Image Service section.
4. Hit **Save.**

TelWare Support Team
If you are having any service-related issues, visit our website support.telware.com or call 1-800-637-3148 to open a service ticket.