



The following guide is intended to outline all the information you need to get started with the Telesystem CRM Integrator. This guide will walk you through how to download, login, and use all the most common features.

You will need

- The ability to install software on your computer and a computer that meets the minimum system requirements.
- Your company's unique CRM serial number. This 8 character alpha-numeric code will be provided by Telesystem to your system administrator when this feature is deployed.
- Your own Telesystem Hosted VoIP credentials (your 10-digit telephone number and its application password).
- Your CRM user information (varies based on the system you link with).

System Requirements

For supported CRM integrations, the system requirements are:

- Windows 10, 8.1, 8 (desktop mode) and Windows 7
- For Skype for Business integrations, the clients supported are the 2015 and 2016 clients
- Web Dialing is supported in IE 11, MS Edge 44.x, Chrome 63.x, Firefox 57.x, and Opera 47, Safari 9.1 and may require an extension/add-on.
- 32 and 64 bit
- 1.8 GHz Pentium-class processor
- SVGA display
- 2GB Memory
- 1GB free hard drive space
- Network adapter connected to a TCP/IP network
- .NET 4.5 Framework (required and shipped with software) from 2.6 version onwards.
- Ultra-wide monitors are not supported
- Keyboard and mouse

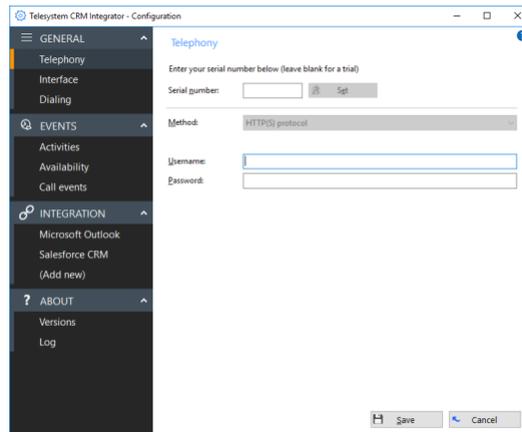
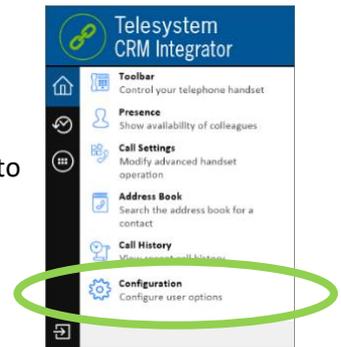
Setup and Use Instructions

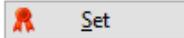
Step 1: Download the application to your computer

1. Point your browser to the www.telesystem.us website and go to (or search for) the CRM landing page
2. Click the **download** link to initiate the file download
3. *Agree/Next/Finish* until the application has fully downloaded to your computer

Step 2: Log into the application

1. **Launch** the *CRM Integrator* application from your start menu or programs then **right-click on the program's square icon** in the task bar to see the CRM options.
2. Choose **Configuration** from the options menu.



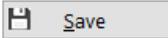
3. In the *Telephony* section, enter your company **serial number** then click 
4. Enter your Telesystem VoIP username and password as shown in the example below

Example:

Username - 5137258801@combuckeye.com

Password - Your Portal/Application Password

Method:	HTTP(S) protocol
Username:	610359712@combuckeye.com
Password:	●●●●●●●●

5. Click 
6. If the correct information has been provided, the CRM Integrator will appear as a **green square** in the taskbar.

Getting an error?

In most cases, errors arise due to wrong or incomplete credentials or serial numbers. Some tips:

- Remember to add *@combuckeye.com* after your phone number for the username as noted in the instructions.
- Be sure to type in your full *application* password (not voicemail) correctly with no extra spaces.
- If you do not know your phone number, password, or serial number, please reach out to your system administrator or Telesystem to assist.

Step 3: Customize and use the application

After you have installed and logged into the client, you will find that the CRM Integrator is highly customizable and can be setup according to your own preferences and needs. The purpose of this next section is to highlight the most common features that are setup or used with the product.



While navigating any part of the software, be sure to look at the top right for the help icon. Click this icon to launch a more robust help for all features.

Taskbar Icon:

After it's been launched, the application appears as a small square the taskbar. The square's color indicates the status of the application and your phone line as follows:



If you use the directory via the application, these same presence indicators apply to others in your business group that are using the software.

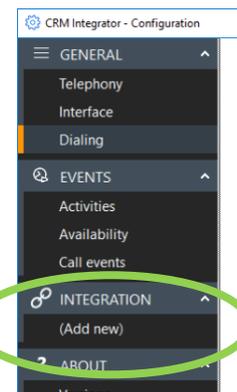
Integrations:

If you intend to link the CRM Integrator with a company CRM system, you must set up the connection in the *Configuration-Integration* section.

To add a new integration:

1. Click **(add new)**
2. **Select** the desired application from the drop down list
3. Click **Set**
4. **Complete** the unique configuration for the CRM then **Save** changes.

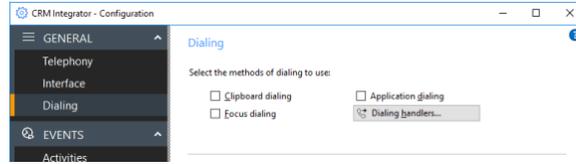
All CRMs require specific information. Use the  help icon on the top right of the CRM integration page to launch an embedded help guide tailored for the CRM you have selected.



Telesystem does not have access to your company CRMs and thus cannot assist in procuring your CRM user credentials or unique CRM information. Please engage your system administrator for this information.

Dialing options:

If you would like to use the CRM Integrator to initiate outbound calls ('click to dial') in additional ways, you can add these in the *Configuration-Dialing* section

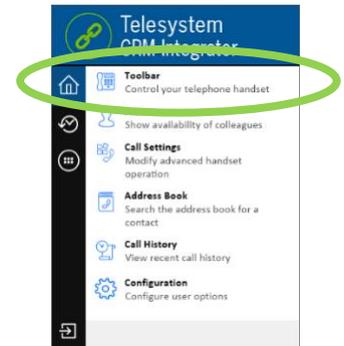


For example, to enable clipboard dialing (copy a phone number to initiate dialing), click the *Clipboard dialing* option. Alternately, there are a variety of add ins for browsers that allow you to initiate a call simply by click on the phone number in your browser.

Toolbar (for licensed Telesystem call center agents):

A popular option for CRM Integrator users that are agents within a Telesystem Hosted Call Center is the CRM Toolbar.

To launch the toolbar, **Right-click on the CRM Integrator square icon** in the task bar to see the CRM options then choose **Toolbar** from the list.



The toolbar gives the Telesystem Hosted VoIP call center agent access to all their basic agent capabilities without taking up much space on the desktop:

