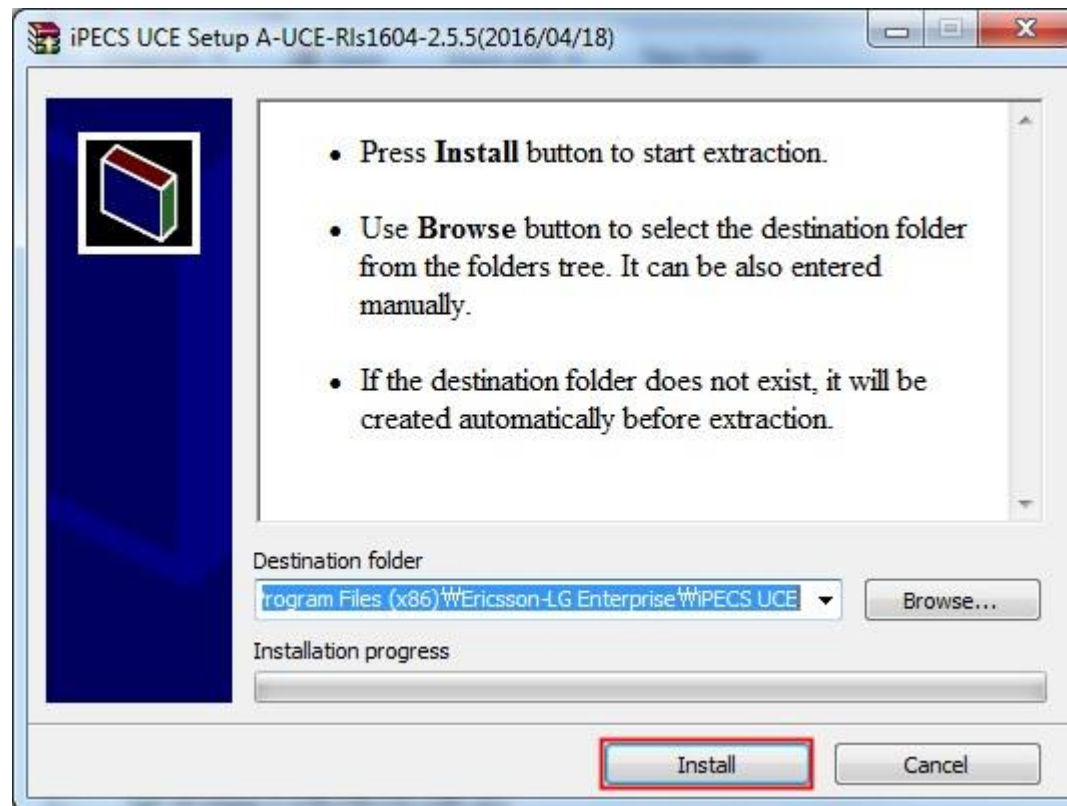


UCE CRM Intergration



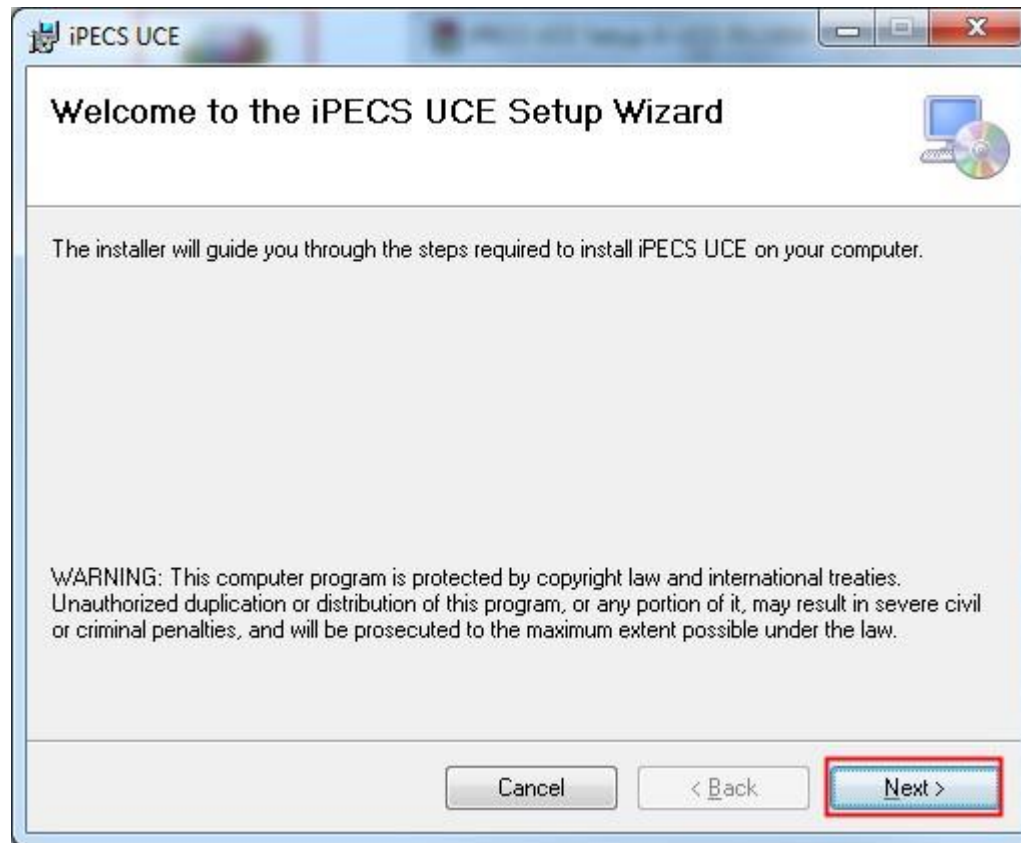
Installation

Open the exe file

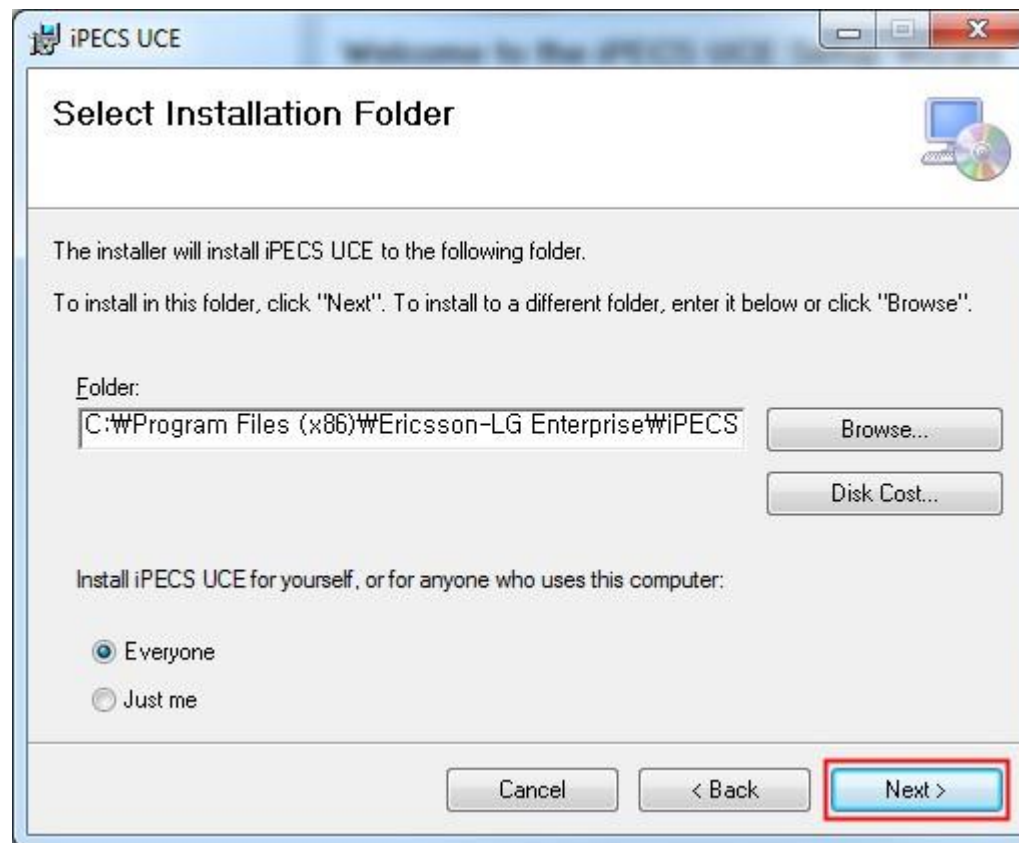


Installation

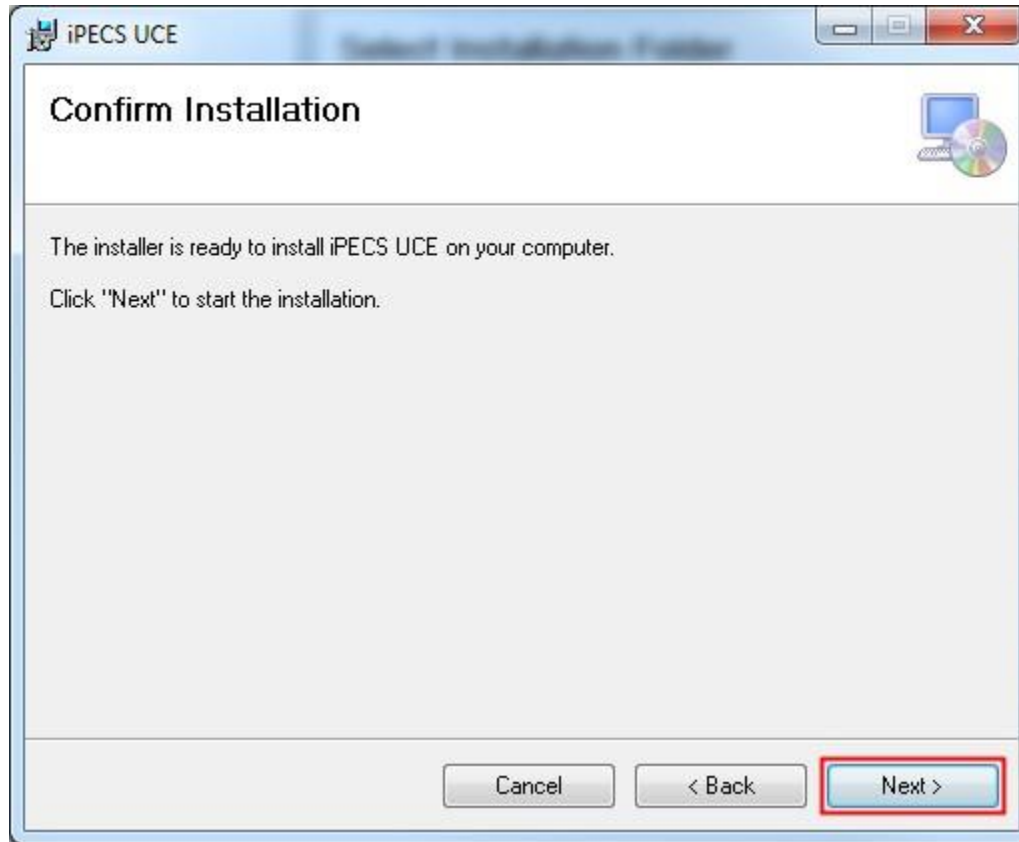
Follow the install wizard



Installation

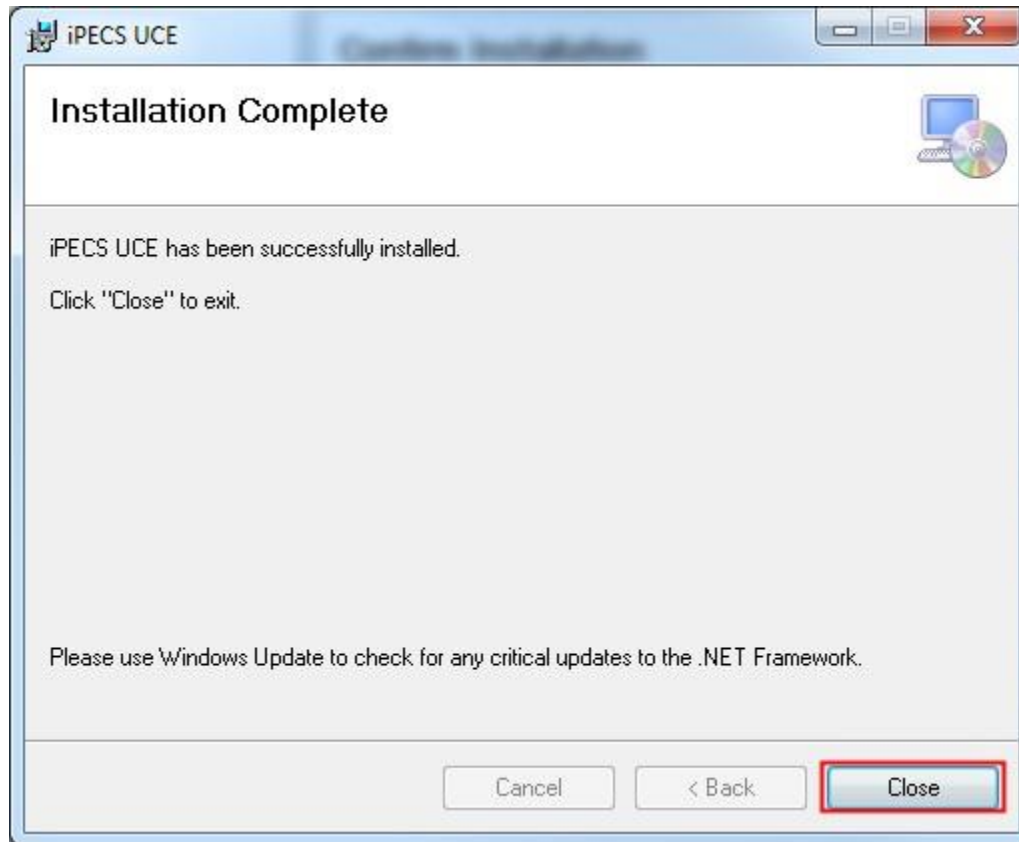


Installation



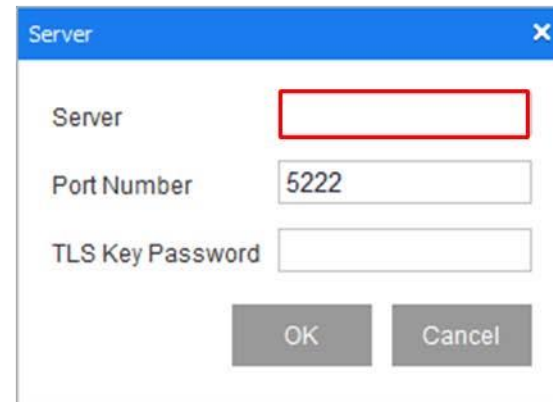
Installation

Click close to complete install



Server setting

Input Server IP : 185.110.180.16



Login

Login with your portal ID and password

Site Management
Music On Hold
Voicemail Service
Company Directory
Feature Codes

User

User Setup
User Phone Configuration
User Feature Configuration
Account Information

Call Manager
Group Settings
Auto Attendant
Service Number
Schedule Setting
Scenario Define
Call Center
Conference Room
Shared Line

Add Modify Delete

Extension * 100 2 ~ 5 Digit
Name * 100 Last name This name is also used for phone
Site * Pragma
Portal ID * 100 @customer.wearepragma.co.uk
Password * ***** At least 8 characters, Max 15 cha
E-mail
Package * Feature User (4)
User Type * Single Client ?
Direct Dial Call Number --- NONE ---
Call Barring * Obey Site Call Barring Default
Outgoing Caller ID * Obey Company Outgoing Caller ID

iPECS UCE

iPECS

iPECS UCE

ID
Password
My Presence Available
 Auto Login
Login

ERICSSON LG



CRM Install

Download the CRM integration toll from our website.

iPECS Cloud Applications

DOWNLOADS:

- iPECS-ATTENDANT-CLOUD(2.0Ax).zip - [84MB]
- iPECS-ATTENDANT-CLOUD(B.0Bg).zip - [76MB]
- iPECS_UCE_3.4.3.zip - [168MB]
- RccvClient_R1.0.19.zip - [37MB]
- UCE-CRM-Integration-2-6-12.zip - [80MB]

[Link](#)



CRM Install

Download the CRM integration toll from our website.

iPECS Cloud Applications

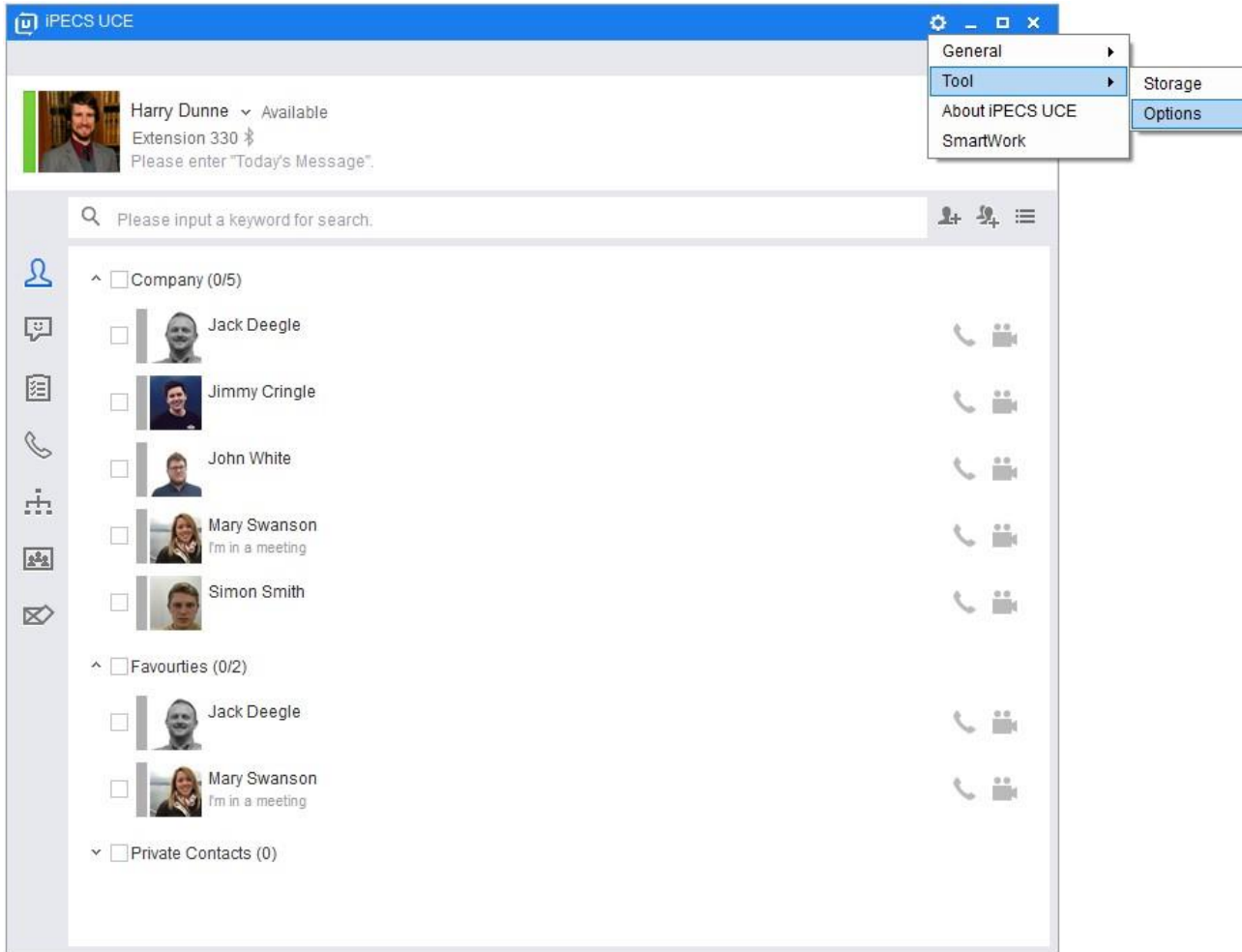
DOWNLOADS:

- [iPECS-ATTENDANT-CLOUD\(2.0Ax\).zip](#) - [84MB]
- [iPECS-ATTENDANT-CLOUD\(B.0Bg\).zip](#) - [76MB]
- [iPECS_UCE_3.4.3.zip](#) - [168MB]
- [RccvClient_R1.0.19.zip](#) - [37MB]
- [UCE-CRM-Integration-2-6-12.zip](#) - [80MB]



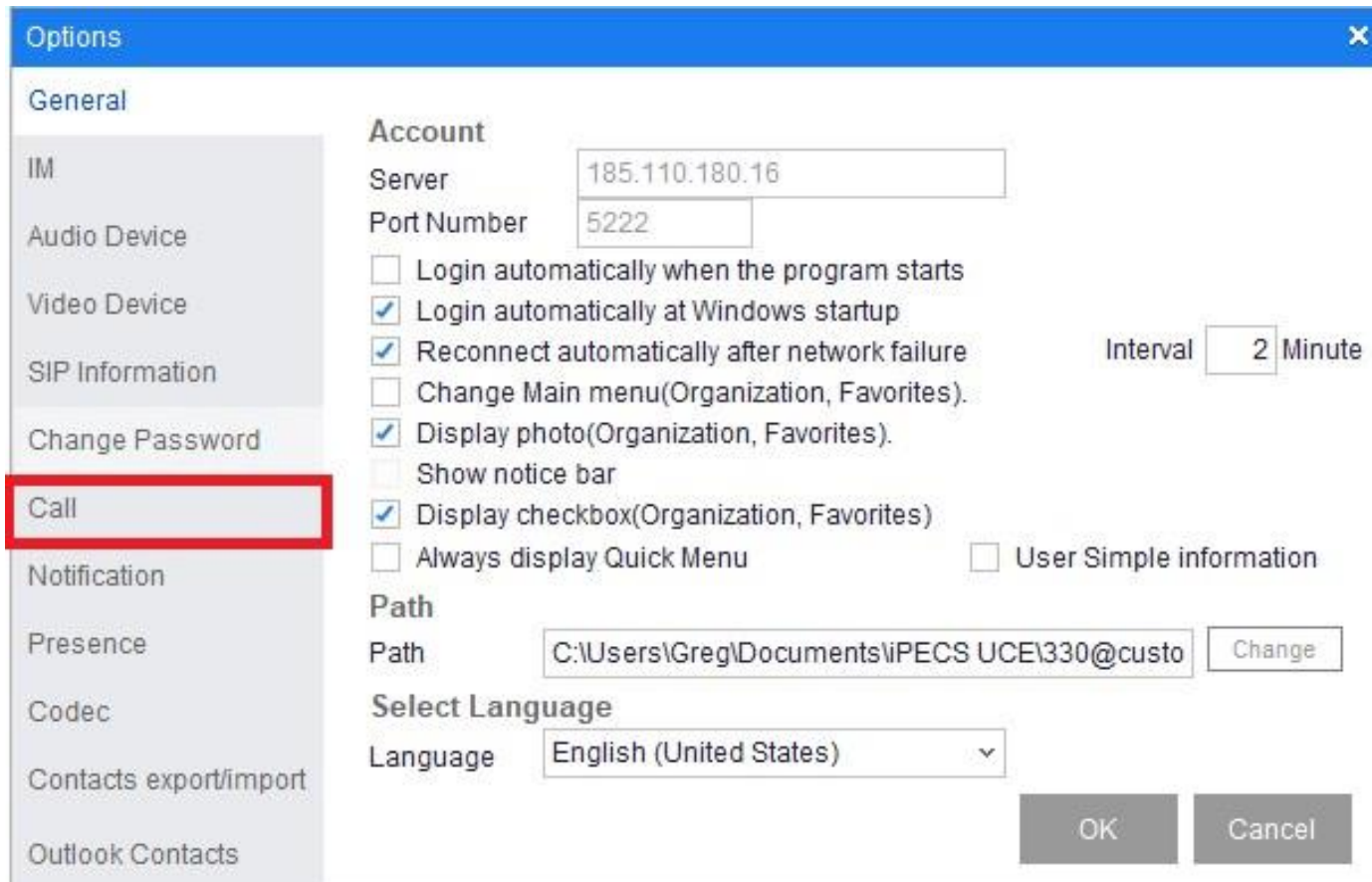
CRM Install

Login and go to the Cog Icon then tolls and then options.



CRM Install

Select Call from the options



The screenshot shows the 'Options' dialog box for CRM installation. The 'Call' option is highlighted in the left sidebar. The main area contains the following settings:

- Account**
 - Server: 185.110.180.16
 - Port Number: 5222
 - Login automatically when the program starts
 - Login automatically at Windows startup
 - Reconnect automatically after network failure (Interval: 2 Minute)
 - Change Main menu(Organization, Favorites).
 - Display photo(Organization, Favorites).
 - Show notice bar
 - Display checkbox(Organization, Favorites)
 - Always display Quick Menu
 - User Simple information
- Path**
 - Path: C:\Users\Greg\Documents\IPECS UCE\330@custo (Change button)
- Select Language**
 - Language: English (United States) (dropdown menu)

Buttons: OK, Cancel



CRM Install

You will now see the CRM options within this screen

The screenshot shows a software configuration window titled "Options" with a sidebar on the left and a main content area on the right. The sidebar lists various settings categories: General, IM, Audio Device, Video Device, SIP Information, Change Password, Call, Notification, Presence, Codec, Contacts export/import, and Outlook Contacts. The "Call" category is selected. The main content area is titled "Dialing Rule" and contains several input fields and checkboxes. A red rectangular box highlights the "CRM Integration" section, which includes two checked checkboxes: "Use CRM Integration" and "Use CRM Pop-up". To the right of these checkboxes are two buttons: "Settings" and "Search". Other visible settings include "Digit Settings" (0 or More), "Exception (SSDP)" (empty field with Add/Delete buttons), "CO Access" (9), "Country Code" (empty field), "Area Code" (empty field), and two checkboxes: "Press the Enter key to answer the incoming call." (checked) and "Call end alert" (unchecked). At the bottom right of the dialog are "OK" and "Cancel" buttons.

Options

General

IM

Audio Device

Video Device

SIP Information

Change Password

Call

Notification

Presence

Codec

Contacts export/import

Outlook Contacts

Dialing Rule

Digit Settings or More
(0 : Not Set)

Exception (SSDP)

CO Access

Country Code

Area Code

Press the Enter key to answer the incoming call.

Call end alert

CRM Integration

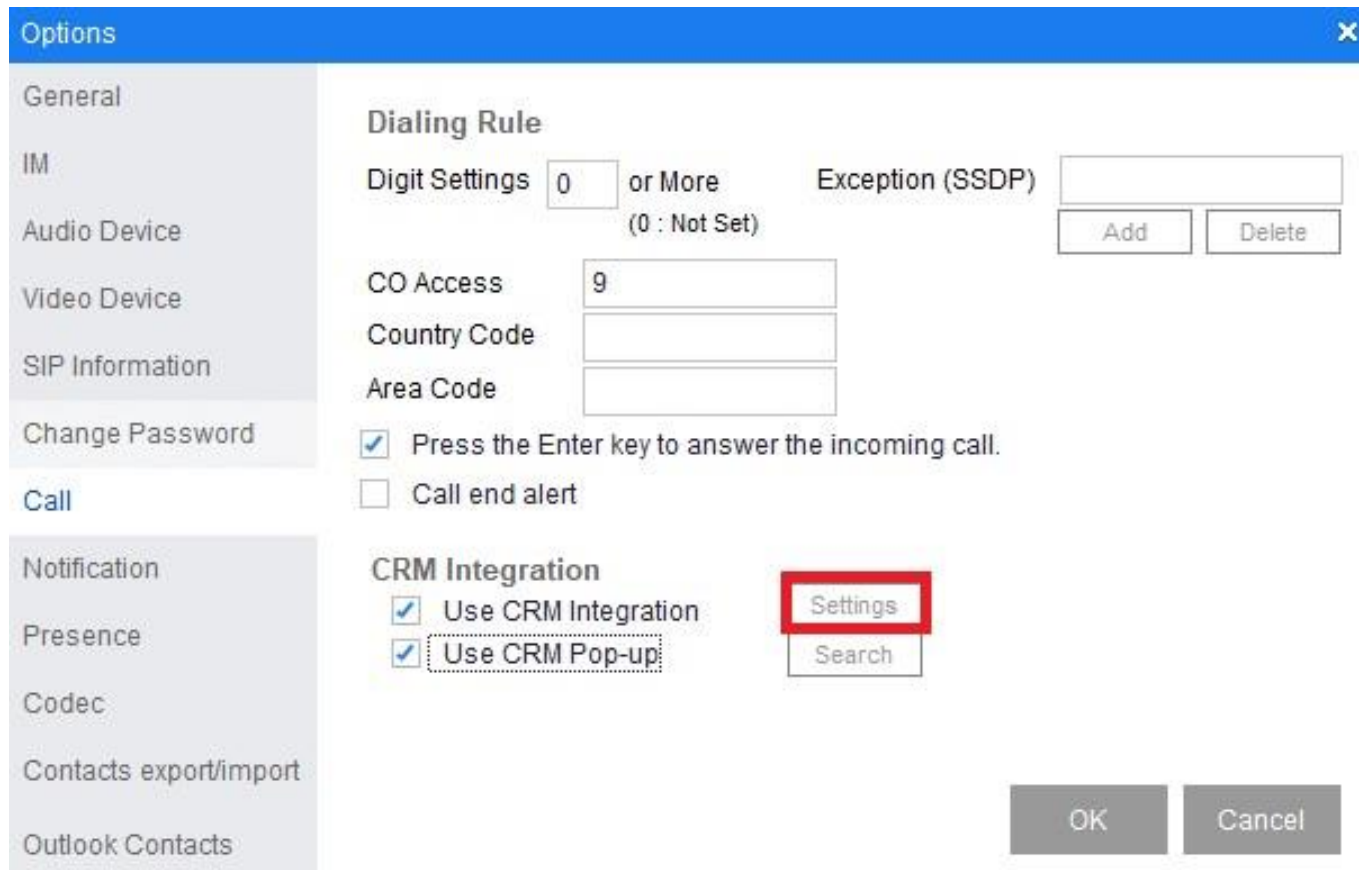
Use CRM Integration

Use CRM Pop-up



CRM Install

Select Settings Next to “Use CRM Integration” and you will get another popup

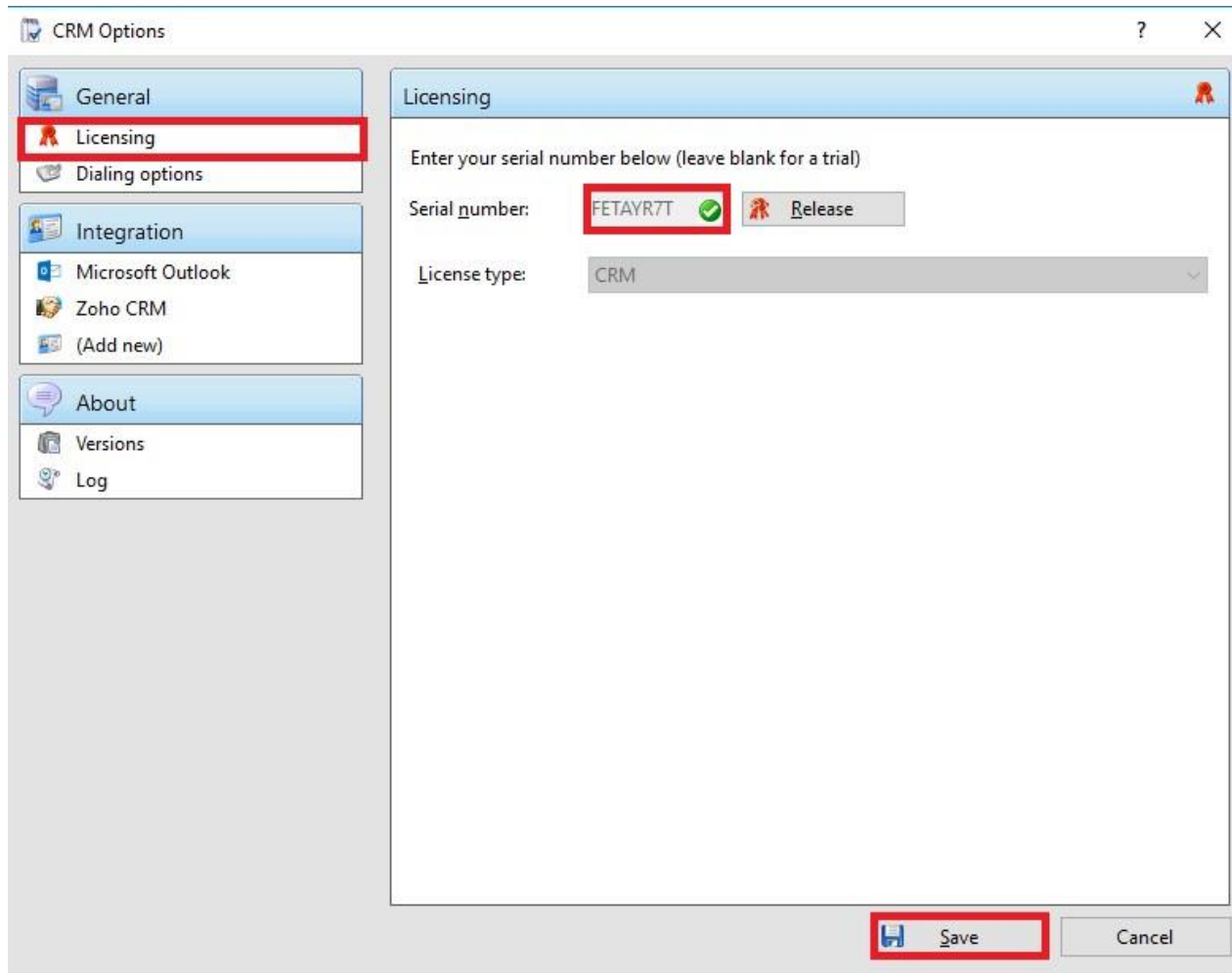


The image shows a screenshot of a software configuration window titled "Options". The window has a blue header bar with a close button (X) on the right. On the left side, there is a vertical menu with the following items: General, IM, Audio Device, Video Device, SIP Information, Change Password, Call, Notification, Presence, Codec, Contacts export/import, and Outlook Contacts. The "Call" section is currently selected. In the main area of the window, under the "Dialing Rule" section, there are several fields: "Digit Settings" with a value of "0" and the text "or More (0 : Not Set)", "Exception (SSDP)" with an empty text box and "Add" and "Delete" buttons below it, "CO Access" with a value of "9", "Country Code" with an empty text box, and "Area Code" with an empty text box. Below these fields are two checkboxes: "Press the Enter key to answer the incoming call." (checked) and "Call end alert" (unchecked). In the "CRM Integration" section, there are two checkboxes: "Use CRM Integration" (checked) and "Use CRM Pop-up" (checked). To the right of these checkboxes are two buttons: "Settings" (highlighted with a red border) and "Search". At the bottom right of the window, there are "OK" and "Cancel" buttons.

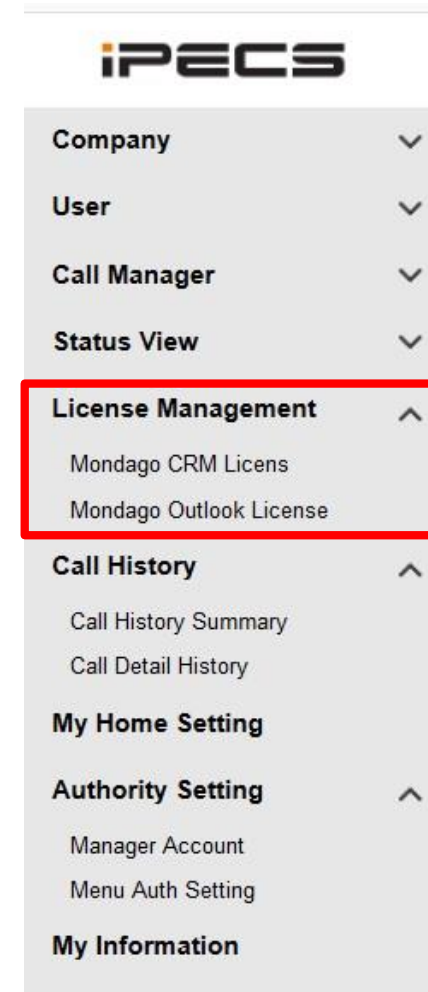


CRM Install

When you click this you will be taken to licencing, you will then need to enter your licence that will be found on the portal under Licence management



The screenshot shows the 'CRM Options' application window. The 'Licensing' tab is selected and highlighted with a red box. The 'Serial number' field contains 'FETAYR7T' and is also highlighted with a red box. A green checkmark icon is visible next to the serial number. The 'License type' dropdown menu is set to 'CRM'. At the bottom of the window, the 'Save' button is highlighted with a red box. The 'Cancel' button is also visible.

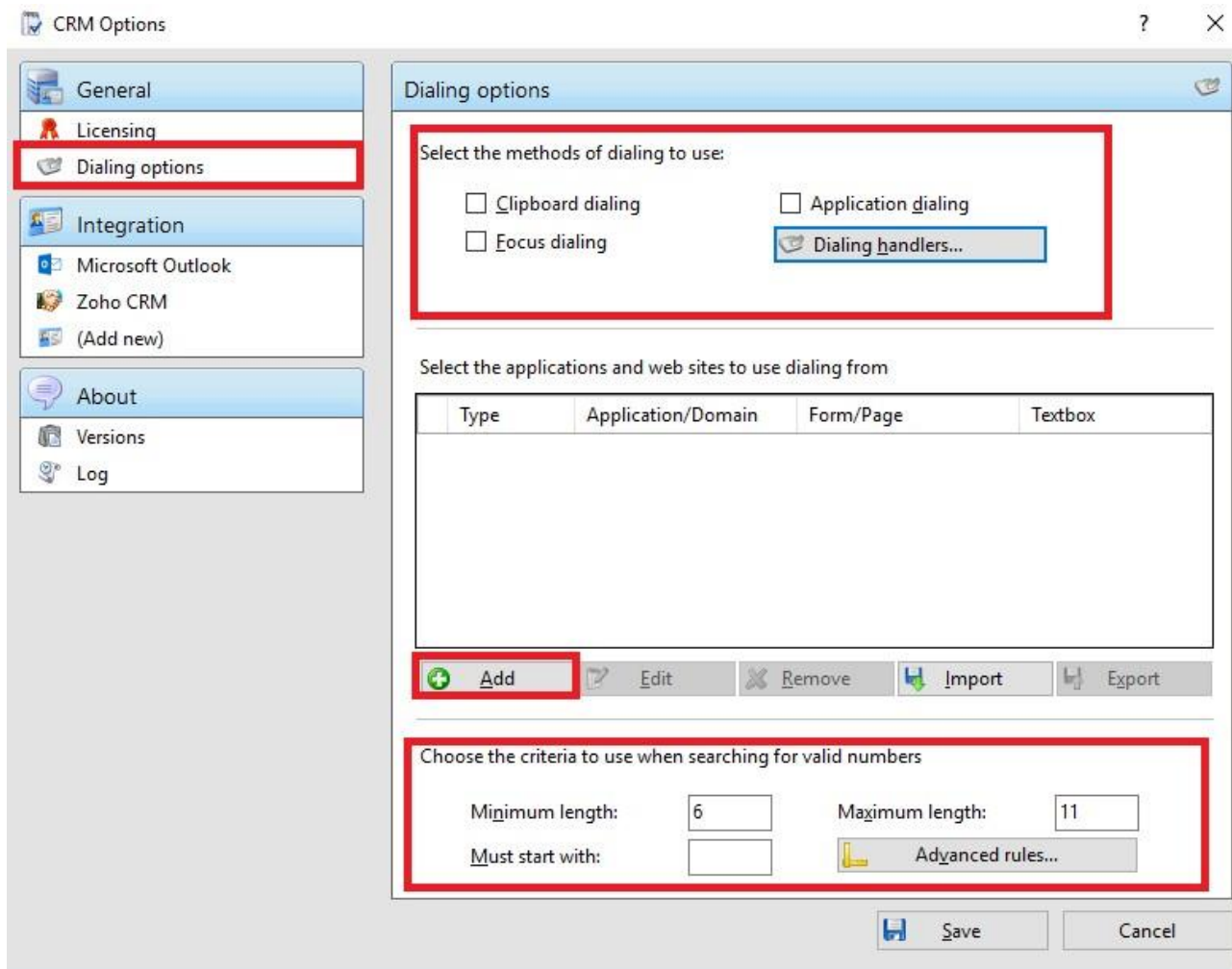


The screenshot shows the iPECS user interface. The 'License Management' menu item is highlighted with a red box. Below it, the sub-items 'Mondago CRM Licens' and 'Mondago Outlook License' are visible. Other menu items include 'Company', 'User', 'Call Manager', 'Status View', 'Call History', 'My Home Setting', 'Authority Setting', and 'My Information'.



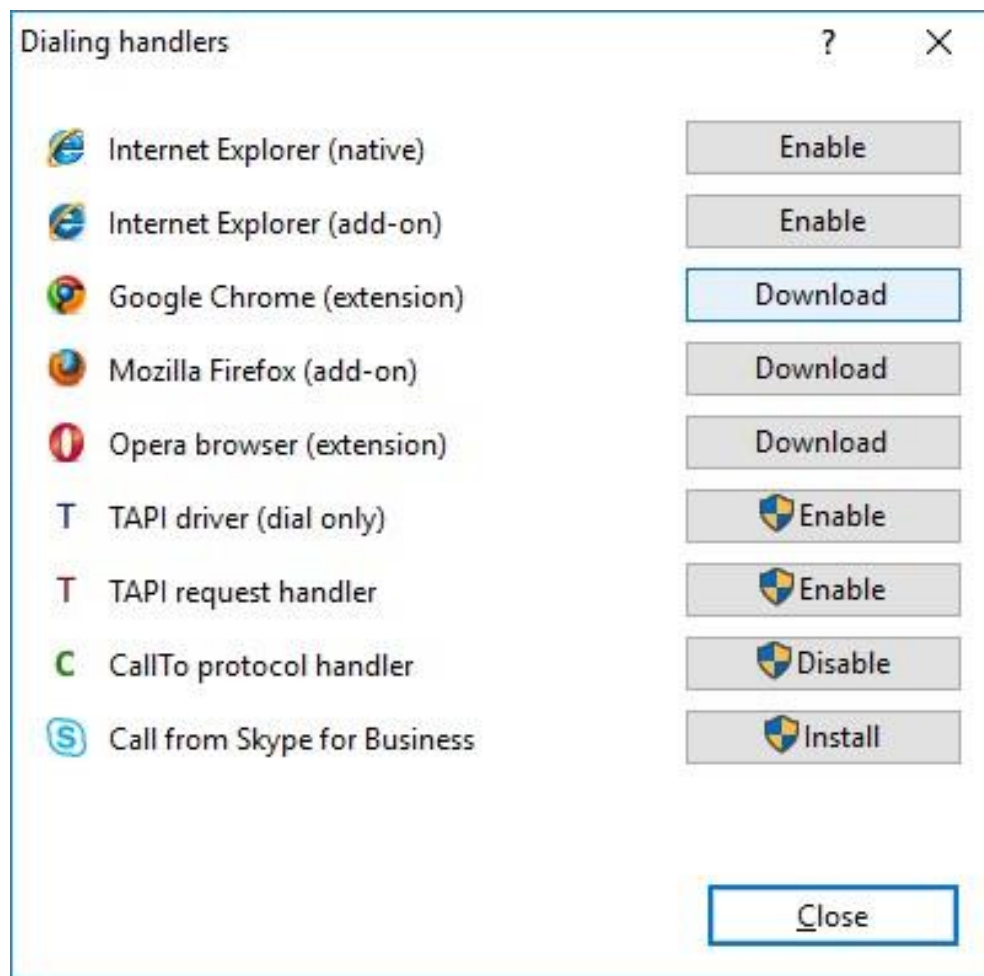
Dialling Options

Now we are in Dialling Options, we can select when we will use click to dial what applications can use this and also the amount of digits that we are looking for.



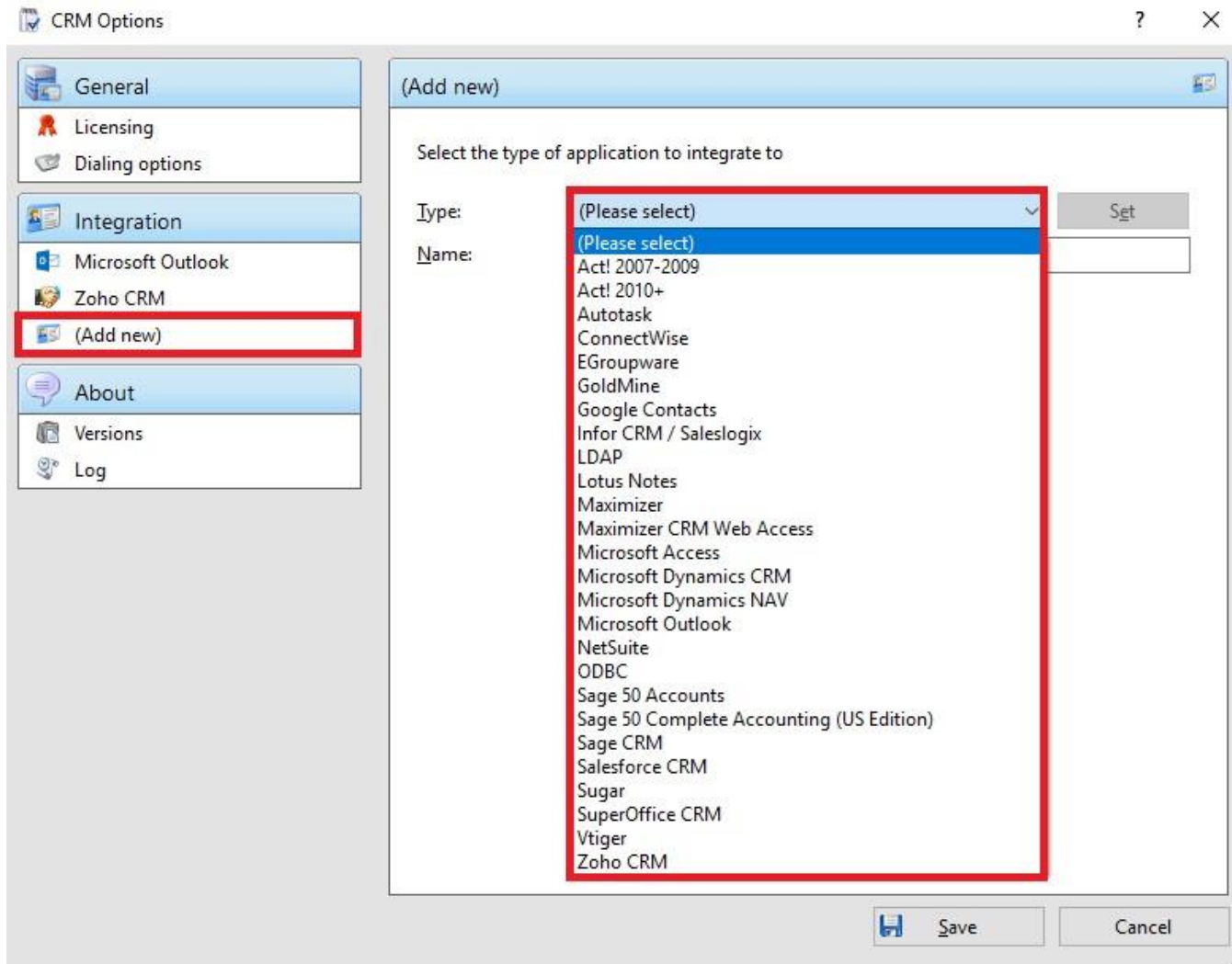
Dialing Handlers

From Dialing Handlers you are able to install plugins for the browser that you use.



Add New CRM

Click add new and then select the CRM that you want to use on the dropdown list.



Add New CRM

Enter the Username and Password and Save

The screenshot shows a 'CRM Options' dialog box with a sidebar on the left and a main configuration area on the right. The sidebar has three sections: 'General' (with 'Licensing' and 'Dialing options' sub-items), 'Integration' (with 'Salesforce CRM', 'Microsoft Outlook', 'Zoho CRM', and '(Add new)' sub-items), and 'About' (with 'Versions' and 'Log' sub-items). The 'Salesforce CRM' option is selected in the 'Integration' section. The main area is titled 'Salesforce CRM' and contains the following fields and options:

- Select the type of application to integrate to:**
 - Type: A dropdown menu set to 'Salesforce CRM' with a 'Disable' button to its right.
 - Name: A text input field containing 'Salesforce CRM'.
- Configuration:**
 - Username: An empty text input field.
 - Password: An empty text input field.
 - Objects: A list of checkboxes for 'Accounts', 'Contacts', and 'Leads', all of which are checked.
- Data connection:**
 - Cache: A checkbox that is currently unchecked.
 - Frequency: A text input field containing '60' followed by the label 'minutes'.
- Integration test:**
 - Telephone: A text input field with a 'Search' button to its right.

At the bottom right of the dialog box, there are 'Save' and 'Cancel' buttons.



Add New CRM

Click Use CRM Pop-up

The screenshot shows a software configuration window titled "Options" with a close button (X) in the top right corner. On the left is a vertical sidebar menu with the following items: General, IM, Audio Device, Video Device, SIP Information, Change Password, Call, Notification, Presence, Codec, Contacts export/import, and Outlook Contacts. The "Call" option is currently selected. The main area of the window is divided into several sections:

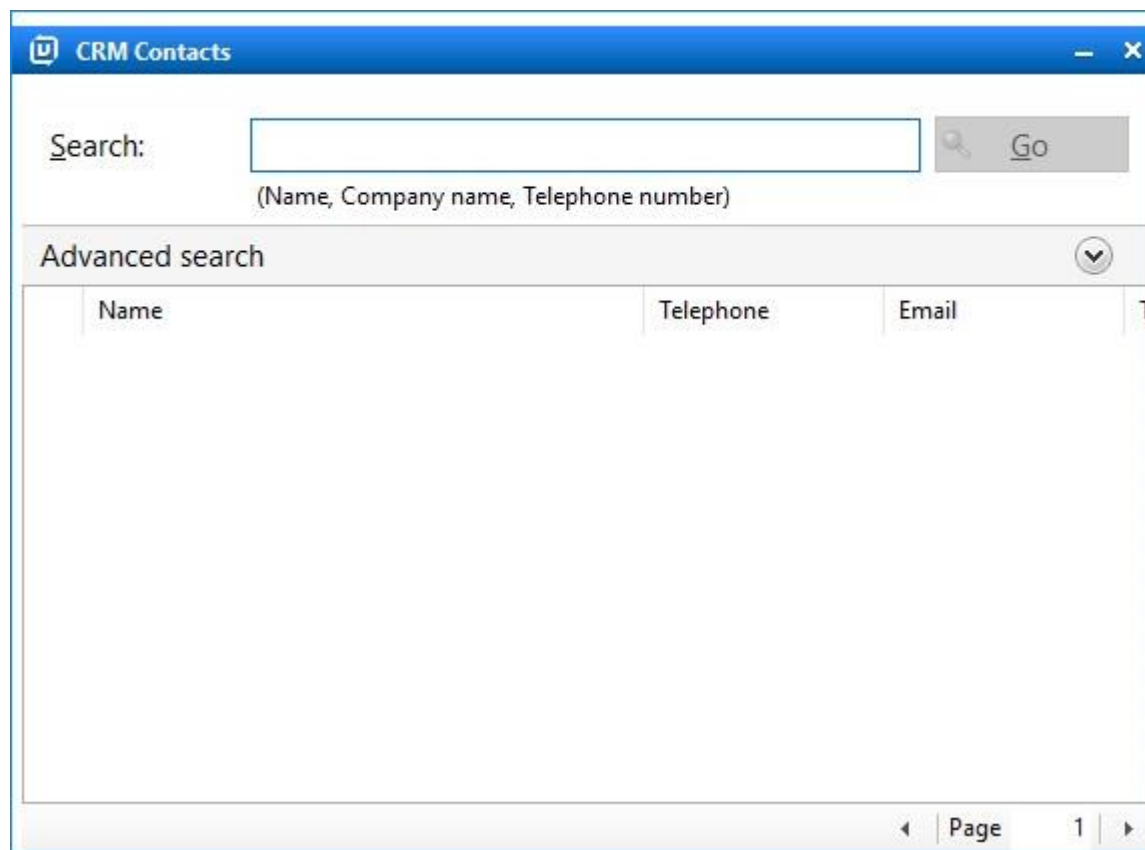
- Dialing Rule**: Includes a "Digit Settings" field with the value "0" and the text "or More (0 : Not Set)", an "Exception (SSDP)" text box, and "Add" and "Delete" buttons.
- CO Access**: A text box containing the value "9".
- Country Code**: An empty text box.
- Area Code**: An empty text box.
- Call Settings**: Two checkboxes: "Press the Enter key to answer the incoming call." (checked) and "Call end alert" (unchecked).
- CRM Integration**: Two checkboxes: "Use CRM Integration" (checked) and "Use CRM Pop-up" (checked). To the right of these are two buttons: "Settings" and "Search". The "Search" button is highlighted with a red rectangular border.

At the bottom right of the dialog are "OK" and "Cancel" buttons.



Add New CRM

Click Use CRM Pop-up this enables you to search your CRM contacts



The screenshot shows a web browser window titled "CRM Contacts". At the top, there is a search bar with the label "Search:" and a "Go" button. Below the search bar, the text "(Name, Company name, Telephone number)" is displayed. Underneath is an "Advanced search" section with a dropdown arrow. The main area contains a table with the following headers: "Name", "Telephone", "Email", and "T". The table is currently empty. At the bottom right of the window, there is a pagination control showing "Page 1".

| Name | Telephone | Email | T |
|------|-----------|-------|---|
|------|-----------|-------|---|

