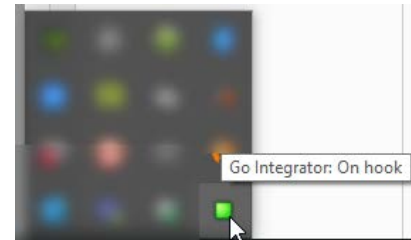


## Welcome to Momentum's CRM Connector LITE

This quick reference guide offers useful information to help you get started.

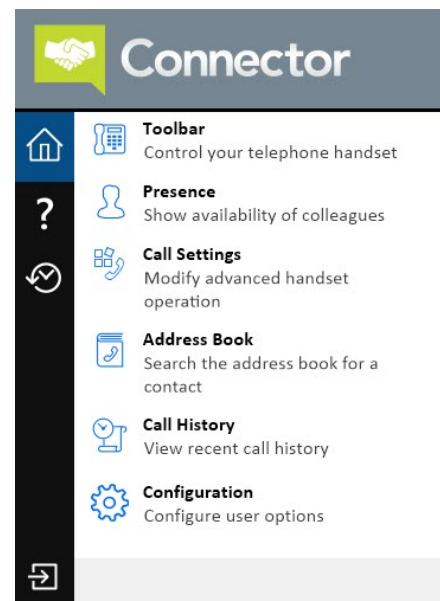
Once installed, the Connector runs in the system tray.

- » It displays as a colored square icon - green, red, yellow, or gray - based on the user's current login status and calling availability.
- » A right-click on Connector icon opens the Tray Menu to manage or configure tools, access calling and contact features, and review helpful information.



## TRAY MENU

- » **Help:** Instant access to helpful application assistance.
- » **Toolbar:** Dial or enter a name to find contact details and control your desk phone.
- » **Presence:** View contact availability and connect
- » **Address Book:** Search and connect within your address book.
- » **Call History:** Review and connect with your most recent calls .
- » **Call Settings and Configuration:** Manage your handset, modify your Connector user experience, and configure CRM Packages and application add-ons.
- » **Exit:** Close and exit Connector.



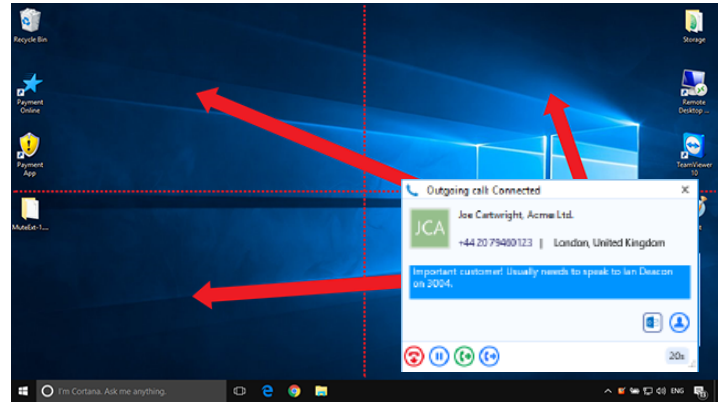
## TOOLBAR

- » The Toolbar is a helpful user interface for Connector that is easily docked on the desktop to make call handling easier.
- » It provides constant access to core calling features along with a range of any Call Center Agent features that are assigned to the user.



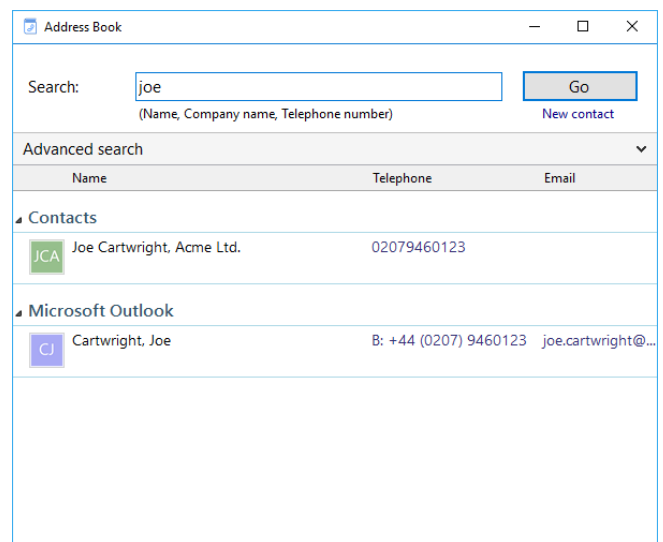
## PREVIEW WINDOW

- » The call Preview window displays when calls occur and by default will fade from view after a few seconds.
- » The display includes any contact information making it easy to see who is on the other end of the call.
- » This view allows the user to answer or manage a call using the call control tools for hold and transfer.
- » Access to the user's Address Book and Contact list is also provided in this view.



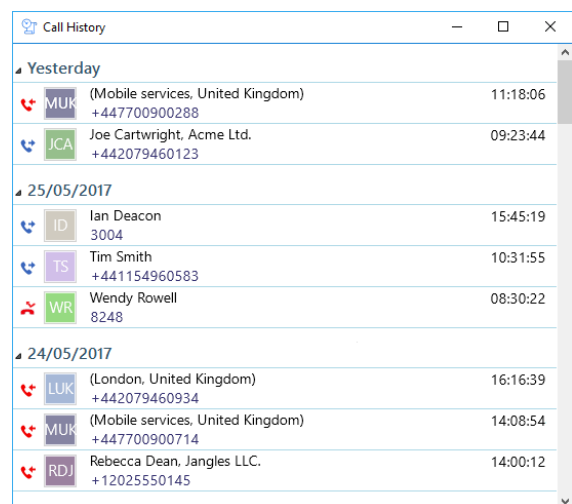
## ADDRESS BOOKS AND CONTACTS

- » The Address Book window provides access to a personal address book as well as any integrated address books that have been configured. You can either click the 'New contact' button to add a contact for future use, or type in search criteria and press 'Go' to look for existing contacts.
- » Clicking on the name in the search result area will show the contact in more detail.
- » Clicking the telephone number will make a call to the contact.
- » Clicking the email address will create a new email to the contact.



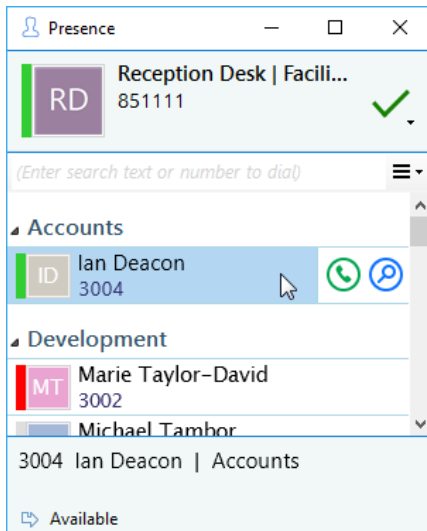
## CALL HISTORY

- » The Call History window shows your fifty most recent calls, arranged in reverse date and time order. The next fifty can be accessed by pressing the page right button in the bottom right of the window.
- » You can make calls from this window by clicking on the contact's telephone number and you can add or edit their name by clicking on the entry in the Name column.
- » The arrow in the left hand column shows whether the call was made by you or received by you, and whether or not it was answered.



## PRESENCE WINDOW

- » The Presence window provides a quick way to check the status of your colleagues. The Presence window shows a list of all the extensions. If you start to type in the search box, the list will show only extensions that match what you typed.
- » Use the call control buttons at the bottom of the window to interact with the call. Some call control buttons display the main Phone preview window. Call controls are determined by the provider. Options can include actions such as Answer, Deflect/Transfer cold or warm, Hold, Play/Resume, Hangup, Conference, etc.
- » The context menu contains a list of actions that you can perform with the extension including calling, consulting and transfer; the available actions depend on the state of the extension.



NOTE: If the default presence list contains more than thirty extensions it is advised to set up a customized list. In cases of very large companies (hundreds of extensions) the default presence window could take upwards of 60 seconds to update when it is first opened.

