



Connector

CRM Connector User Guide

Lite for PC

MOMENTUM

T E L E C O M

Momentum Telecom, Inc. © 2023. All Rights Reserved.

The Momentum Telecom name, logos, and the names and marks associated with Momentum products are registered trademarks and/or service marks of Momentum Telecom in the United States and other countries. All other product trademarks, brands, and their ownership thereto mentioned within this document are hereby acknowledged.

The contents of this document are intended to assist customers and partners of Momentum Telecom on an individual basis. All contents are considered proprietary. No part of this document may be reproduced, translated, or transmitted in any form or by any means for any purpose, without the express advanced written permission of:

Corporate Training Dept c/o Momentum Telecom, Inc.
1200 Corporate Drive | Suite 300 Birmingham, AL 35242

Momentum Telecom, Inc. reserves the right to make changes to or update documentation in order to provide additional information when needed, at any time, without prior notice.

CONTENTS

1. ABOUT	5
2. INSTALLATION	5
3. TRAY MENU	6
3.1 HOME	6
3.2 HELP	6
3.3 RECENT CALLS	7
3.4 COMMPILOT EXPRESS	7
3.5 FEATURES	7
3.6 EXIT	7
4. PREVIEW WINDOW	8
4.1 POSITIONING	8
4.2 CLOSE BUTTON	8
4.3 CONTACT INFORMATION	8
4.4 CALL CONTROLS	9
4.5 MULTIPLE CALLS	9
4.6 CONFERENCE	9
5. TOOLBAR	10
5.1 DOCKING AND POSITIONING	10
5.2 CRM DISPLAY	10
5.3 CALL DISPOSITION	10
5.4 CALL CONTROLS	10
5.5 OUTGOING AS	11
5.6 AVAILABILITY	11
5.7 ASSISTANCE	11
5.8 QUEUES	11
5.9 TRANSFERS	11
6. PRESENCE WINDOW	12
6.1 USER/EXTENSION DETAILS	12
6.2 SEARCH	12
6.3 USER CALL STATUS ICONS	13
6.4 HOVER MENU	13
6.5 PRESENCE OPTIONS	13
6.6 CALL INFORMATION	13
6.7 EXTERNAL LED	13
7. CALL SETTINGS	14
7.1 CALL FORWARDING TAB	14
7.2 ANYWHERE TAB	14
7.3 OUTGOING AS TAB	15
8. ADDRESS BOOK WINDOW	16
8.1 ADDRESS SEARCH	16
8.2 NEW CONTACT	16
8.3 ADVANCED SEARCH	16
8.3.1 <i>Search Results</i>	16
8.4 CONTACT RECORDS	17
8.4.1 <i>Personal and Group Contacts</i>	17
8.4.1.1 Contact Type	17

8.4.1.2	Contact Details	17
8.4.1.3	Dial Button	17
8.4.1.4	Email Button	17
8.4.1.5	Notes	17
9.	CALL HISTORY	18
9.1	VIEW/ADD CONTACT	18
9.2	HOVER MENU	18
10.	CONFIGURATION	19
10.1	TELEPHONY SETTINGS	19
10.2	INTERFACE SETTINGS	20
10.2.1	<i>Basic Interface Settings</i>	20
10.2.2	<i>Advanced Interface Settings</i>	20
10.2.2.1	Use Dialed Number for Searches	20
10.2.2.2	Include Internal Numbers in Searches	20
10.2.2.3	Show Full Dialed Number	20
10.2.2.4	Prefer Call Center Number	21
10.2.2.5	Hot Keys	21
10.2.2.6	Clear Cache	21
10.3	DIALING SETTINGS	21
10.3.1	<i>Dialing Applications</i>	23
10.3.2	<i>Dialing Configuration Wizard</i>	24
10.3.2.1	Detect Numbers in Web Pages and Web-based Applications	24
10.3.2.2	Detect Numbers in Non Web-based Applications	24
10.3.3	<i>Dialing Add-Ons</i>	25
10.3.3.1	Microsoft Internet Explorer Dialing	25
10.3.3.2	Microsoft Edge Dialing	26
10.3.3.3	Google Chrome Dialing	27
10.3.3.4	Mozilla Firefox Dialing	28
10.3.3.5	Opera Dialing	30
10.4	AUDIO SETTINGS	31
10.5	AVAILABILITY EVENTS	31
10.5.1	<i>Update Skype for Business</i>	31
10.5.2	<i>External LED</i>	31
10.6	CALL EVENTS	32
10.6.1	<i>Call Actions</i>	32
10.6.2	<i>Call Sound Selection</i>	32
10.6.3	<i>External Program Call Events</i>	32
10.6.3.1	Custom Events Setup	33
10.6.3.2	Command Line Parameter Primer	33
10.6.3.3	Passable Call Information	34
10.6.3.4	Chosen Application Parameters	34
10.6.4	<i>Call Event Configuration Prep</i>	35
10.6.5	<i>Software Call Event Configuration</i>	35
10.7	INTEGRATION SETTINGS	37
11.	VERSIONS	38
12.	LOG	38
13.	CUSTOMER SUPPORT	39

1. ABOUT

The Momentum Connector Client software (powered by *MondaGO Go Integrator*) for PC is supplied via internet as an easy self-contained installation download. The installer provides the files needed to place a copy of the Connector Client on your Computer. Once installed, it is easy to set up and use the various viewing and dialing options available through the Connector Client.

Note: The information presented here offers useful examples of all possible features as a reference.

The Connector Client you have may differ from these examples – including the available features, display styles and logos, etc. – as each feature is dependent on the provider and how your organization defines access for each user.

2. INSTALLATION

Installation of the Momentum Connector client is made easy by the Installation Wizard. It assists users through the process step by step, and requests information as it is needed.

Before you start, please ensure that you know or have the following ready:

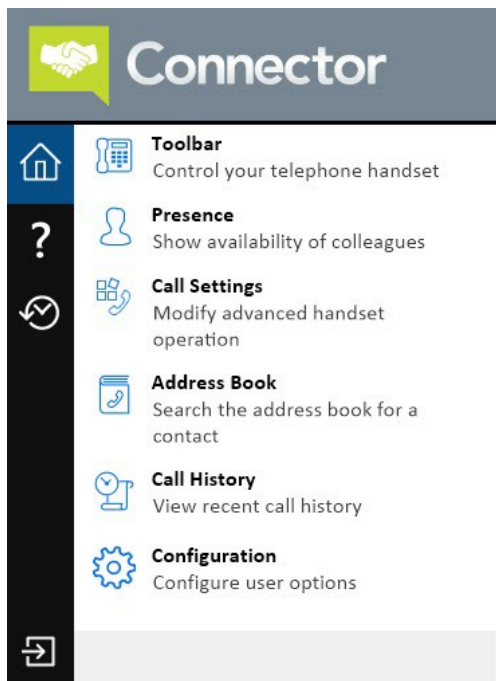
- A suitable computer to install the client that meets the minimum memory and system requirements
- Your login credentials (username/password) as provided by Momentum.
Example: [yournumber]@mymtm.us + your active directory/assigned password

* Contact the Provider to receive the XSP URL and to identify any license information required for your installation, or to request assistance with your setup.

1. Download the Momentum Connector using the web link sent to you by your system administrator or service provider.
2. When the installation steps are complete, a Connector Client icon is automatically added to the Windows Tray Menu and the application opens to display the Telephony settings page of the Configuration window.
3. Click on the tray icon to open the application.
4. Enter the login credentials where requested and any other information the system requires, as needed.

3. TRAY MENU

The Connector Client is accessed from the **Tray Menu** by right-clicking on the Connector Client icon that is automatically added during installation. It displays as a green square when your phone is Idle (or red if you're on a call, or yellow if a call is on hold).



Note: In Windows 7 and above, some tray icons become hidden and must be set up in Windows to display. These settings are stored in the "Notification Area Icons" part of the Windows Control Panel.

When opened, the Connector Client dialog displays menu options for the features and settings that are available to the user, along with a text box to enter text or numbers to search for within any integrated applications.

- Results are dynamically displayed directly in the tray menu for selection as text is typed into the text box.
- Calls can be made to any contacts returned in the search by clicking on the number displayed in the results.

Clicking on the icons in the left-hand menu displays the various management and viewing sections. These can include:

3.1 Home



From this section, users can access the other parts of Connector Client by clicking on the appropriate option displayed within the view.

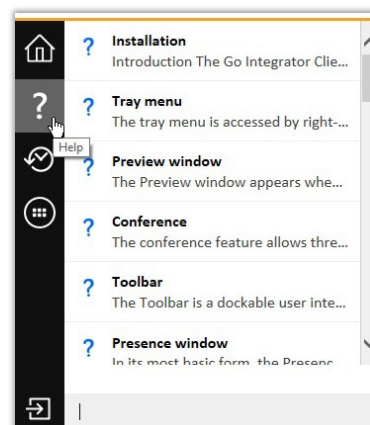
3.2 Help



Click this option to review online help options. Click on a topic to open Online Help page in your default internet browser, and then double-click on the topic option you would like to review.

When this section of the menu is being viewed, the search field at the bottom of the dialog is used to find words or phrases within the online help documentation.

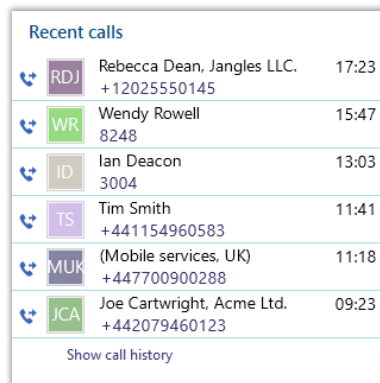
(Enter search text)



3.3 Recent Calls



Quickly see recently dialed numbers and click to redial them.



3.4 CommPilot Express



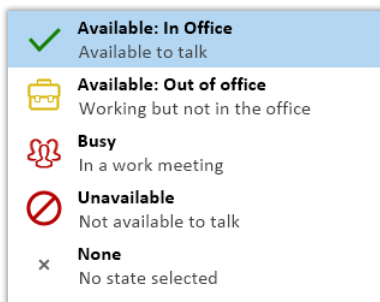
Some versions of Connector either do not include or have modified implementations of this feature.

The CommPilot menu option makes it easy to quickly select your preferred CommPilot Express (availability) profile and to view the current state* of other users.

* The CommPilot state of other users who subscribe to CommPilot Express.

These can also be linked to your Microsoft Outlook calendar so that the status of your Microsoft Outlook calendar will set your CommPilot Express profile. To link these, you must set your Appointment setting in your Microsoft Outlook integration to "(Default)". The Microsoft Outlook calendar availability will match to your CommPilot Express profiles as follows:

CommPilot Express	Microsoft Outlook calendar availability
Available: In Office	Free
Busy	Busy
Busy	Tentative
Available: Out of Office	Working elsewhere

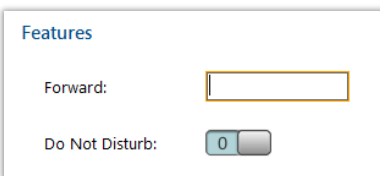


3.5 Features



Some versions of Connector either do not include or have modified implementations of this feature.

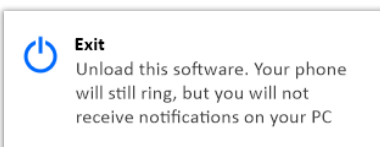
The Features menu provides you with options to control the behavior of your phone. The options available from this menu are "Call settings", "Set Forward All" and "Set Do Not Disturb".



3.6 Exit

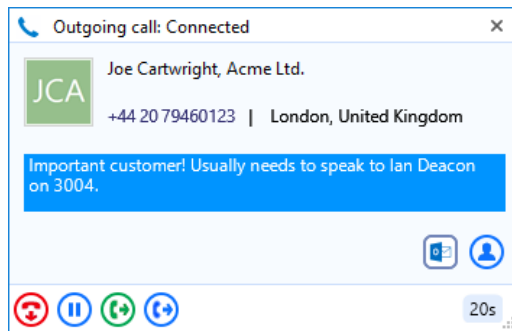


Click this Icon to close the software.



4. PREVIEW WINDOW

The Preview Window appears when a call is made or received. It contains much of the information from the main Phone window but in a much more compact format and it disappears shortly after a call connects.

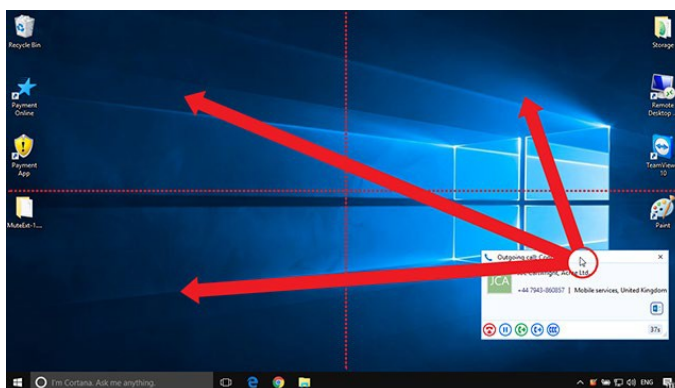


4.1 Positioning

The Preview window opens in the lower right corner of the window by default. It can be repositioned to display in any screen quarter and this position will be retained. Please note this is a fixed position in each quarter. To do this:

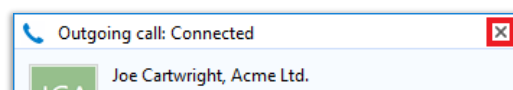
1. Place the cursor anywhere along the header bar.
2. Click and hold then drag and drop the cursor into the screen quarter where the window should appear in the future.

The Preview window will initially sit exactly where it was dropped until it fades out but will reappear in the appropriate corner of the given screen quarter from then on.



4.2 Close Button

Click to make the Preview window disappear immediately.

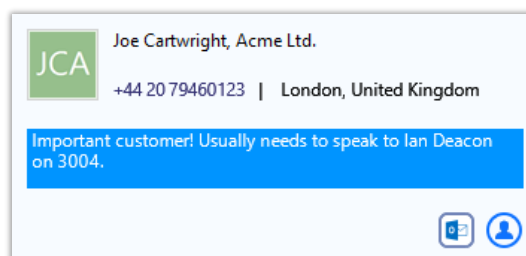


4.3 Contact Information

The telephone number and name of the other party.

If notes are contained in the contact's record, they will also be displayed.

Click on a contact record icon to open the contact record in the corresponding 3rd party software.



4.4 Call Controls

Use the call control buttons at the bottom of the window to interact with the call.

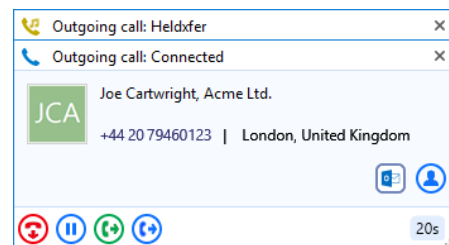
Some call control buttons display the main Phone preview window. Call controls are determined by the provider. Options can include actions such as Answer, Deflect/Transfer cold or warm, Hold, Play/Resume, Hangup, Conference, etc.



4.5 Multiple Calls

When more than one call is in progress at the same extension, the Preview windows are now stacked with the active call always at the front.

The hidden call is simply selected by clicking its header box (behind the active call).



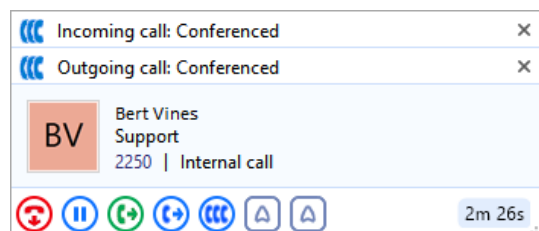
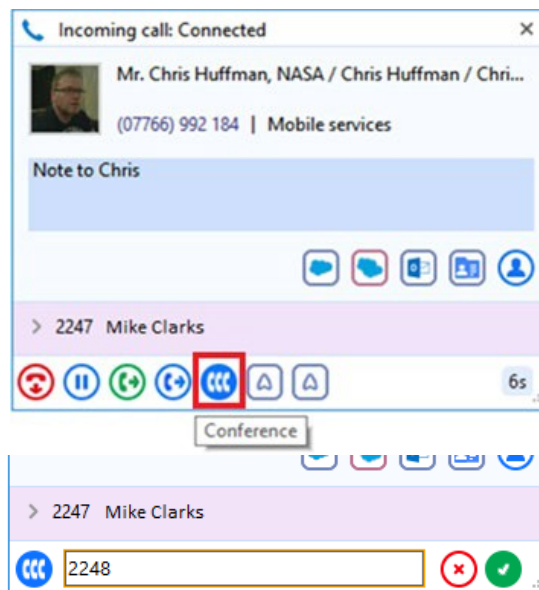
4.6 Conference

Note: Some versions of Connector do not show the conference button, or your system may not be set up to support this feature.

The conference feature allows the user and two other parties to simultaneously be in the same call.

During an active call:

1. Click the **Conference** call control button
2. Type the number you wish to conference with into the field provided.
3. Click the green Checkmark icon to simultaneously place the current caller on hold and dial the entered number.
4. Once connected, press the **Conference** call control button again to join all parties in the call.
5. During a conference the calls are stacked in the display to reduce the size of the display.
6. To end the conference, press the **Hangup** (end call) icon.



5. TOOLBAR

The **Toolbar** is a user interface for Connector. It allows many of the core features to be accessed, plus it provides a range of Call Center Agent features. The features available with the toolbar are controlled by the BroadWorks service assigned to the user and the license type. This is presented in a smaller format that can be docked on the desktop. Some Toolbar features will either be greyed out or not shown. This is dependent on the Connector license type assigned, the BroadWorks services assigned to the user, and the queue type associated with the active call.

User with BroadWorks Call Center*



User without BroadWorks Call Center*



*Display of Call Center features requires an appropriate Connector license.

5.1 Docking and Positioning

The Toolbar can be docked to the top or bottom of the desktop screen (Windows 8 and 10 only) or moved or closed using the controls shown.



The "X" closes the Toolbar.

The 4-way arrow docks and undocks the Toolbar.

The patterned rectangle is the grip box for drag and drop of the Toolbar to other areas around the screen when undocked.

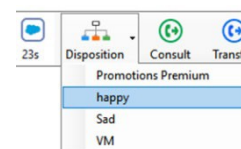
5.2 CRM Display

The left hand side of the toolbar displays the CRM integration features like Caller Preview and Contact Popping, as well as extension / group / queue name.



5.3 Call Disposition

When in use, this section of the toolbar allows a call disposition code to be set while the Agent is either in a queue call or in wrap up state. The disposition codes shown are as configured in BroadWorks.



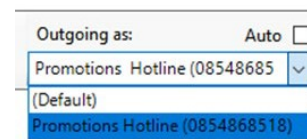
5.4 Call Controls

Standard call control features (pick up, transfer, hangup, etc.) display dynamically as the service is available to the user during a call. Note: Conference is not available from the toolbar.



5.5 Outgoing As

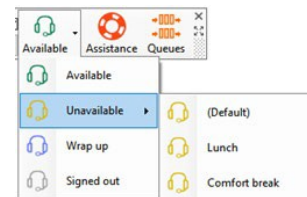
Allows the agent to select the outgoing DNIS presented to the called party either manually by selecting a number from a drop down list or allowing Connector to decide based on the closest geographic match to the number being dialed. This feature requires the BroadWorks Premium Call Center DNIS service.



5.6 Availability

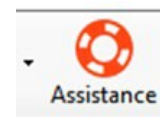
Quickly and easily select an availability status.

Any custom Availability codes (as defined in the BroadWorks configuration) are also displayed for review and selection.



5.7 Assistance

Clicking the Assistance icon while in a call will escalate the call to the Supervisors defined in BroadWorks. This action simply sends the #83 feature code.



5.8 Queues

Clicking the Queues icon expands the Toolbar to show information about the Agent's assigned queues.

It also allows the Agent to join and un-join their queues.

Join	Name	Telephone	Calls in Queue	Total Agents	Available Agents	Wait Time
<input checked="" type="checkbox"/>	Promotions Hotline (Premium)	085486818	0	3	2	0s
<input type="checkbox"/>	Payment Enquires (Basic)					
<input checked="" type="checkbox"/>	Record Sales (Standard)	085486814	0	4	3	0s

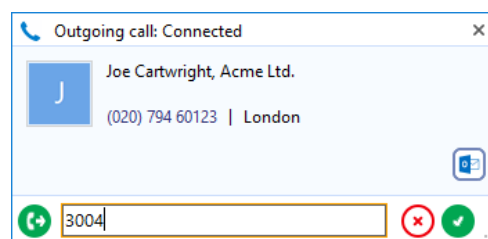
The queue statistics displayed here offer the number of agents joined to a queue and number available to take a call. Wait time is the expected wait time for queued callers. This statistic is provided directly from the BroadWorks platform.

5.9 Transfers

To transfer a call to a co-worker as a **Consult** (warm) or blind **Transfer** (cold) you either press the **Consult** button or the **Transfer** button. You choose the button according to whether you want to let the other person know a call is being transferred (Consult) or not (Transfer).

This opens the **Make Call** view, but with the word Consult or Transfer at the top. Opening this view does *not* immediately place the caller on hold. It prepares to allow you to perform a transfer – so when you are ready, type the number to dial and click the Transfer/Consult button according to the required action.

- If you are consulting, then the original call will be put on hold pending transfer (the pending

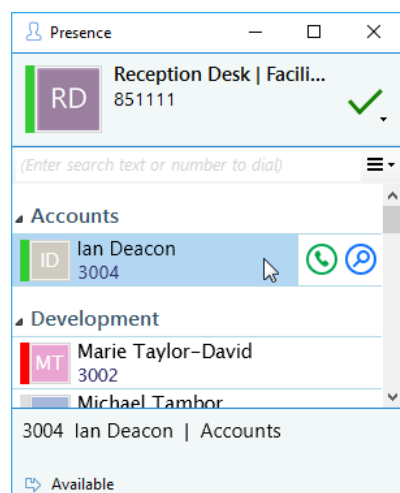


transfer bit is important). When you have finished talking to the other caller, you can either click **Cancel** to return to the original call or click **Complete** to transfer the original call to your co-worker.

- If you are transferring, then the call will be put straight through to the number you dialed and will no longer be on your line. You can also transfer calls when viewing the **Presence** window.

6. PRESENCE WINDOW

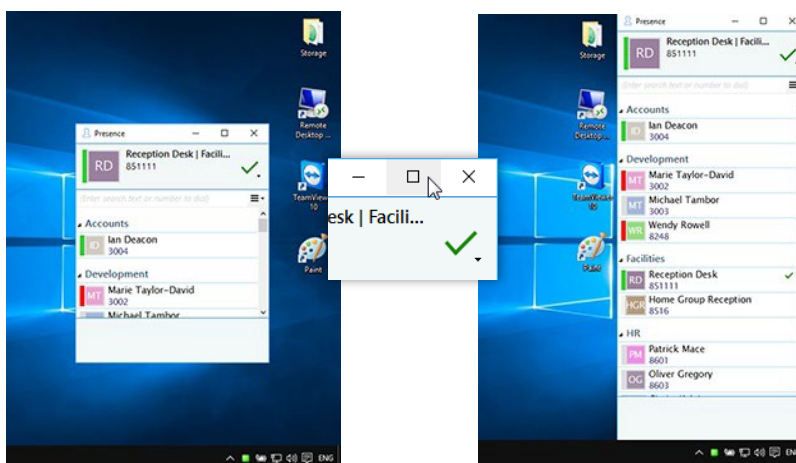
In its most basic form, the **Presence** Window provides a quick way to check the availability of co-workers.



The Presence window is accessible from the tray menu and contains a list of all the extensions, unless your administrator has chosen a different arrangement.

Windows 8 and above users can **dock** the Presence screen to the right hand side of their primary monitor. When other applications are maximized, they will fill the screen up to the left edge of the Presence dialog.

The size is controlled by choosing the desired width of the Presence window when "normalized" and then clicking the "maximize" button at the top in the toolbar to fill the screen from top to bottom at that width.



6.1 User/Extension Details

The current call status is indicated here by the icon.



6.2 Search

To filter the list of users/extensions, text can be typed into this box and the list will update to only show items containing that text.

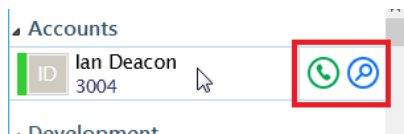


6.3 User Call Status Icons



These color code icons (next to an avatar or picture) indicate the current call status (available, DND, held, busy, etc.) of each user/extension.

6.4 Hover Menu

If you place the cursor over one of the entries in the list, a useful context menu displays.

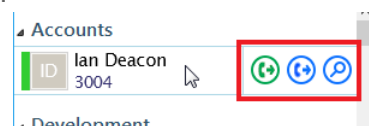


The options in this view are

-  Make Call (dials the contact)
-  Show Detail (opens the contact details for

review) If you are already on a call, useful in-call action options display.

The green Transfer/Consult button places the current call on hold pending transfer and makes a concurrent call to the selected number. The blue Transfer/Consult button transfers the call immediately (remember to say goodbye first). If you see an extension that is flashing **red** then it means that the extension has a call ringing at it. Hover over the extension and the context menu will include an option to pick up the ringing call.



6.5 Presence Options





Personalize your Presence window to include just the contacts that you need using the customization options in the drop-down list, or choose the **User List** for hot desk

environments. The maximum number of drives monitored cannot exceed 30.

6.6 Call Information

When an extension is selected, other information about that extension can be seen here including the current call (if there is one). †Some versions of Connector either do not include or have modified implementations of this feature.

3004 Ian Deacon | Accounts
 +442079460123 Joe Cartwright, Acme Ltd.
 Available

6.7 External LED

Connector has plug and play compatibility with External LEDs so everyone in the office can see whether a colleague is available for a conversation, busy on the phone, or simply does not want to be disturbed.

Green = Available

Red = Busy

Blue = Do Not Disturb/Forward

Fast Flashing **Yellow** = Held

Flashing **Red** = Ringing

Slow Flashing **Magenta** = Voice Mail

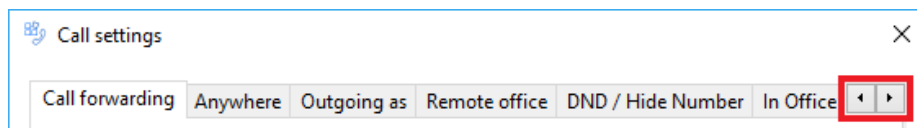
7. CALL SETTINGS

The **Call Settings** sections are defined for availability by the provider. Each offers access to modify and customize various Connector settings and configurations with other applications. It displays tab access to each setting section.

Hint: Scroll to the right to view more settings if your display is not maximized when viewing.

(Where Enabled) In addition to any subscriber portal offered by the service provider, Call Settings provides a way to configure certain user settings.

- The Call settings page consists of multiple tabs for available setting options.
- Click on a tab to see the related setting options.
- Users with smaller screens can click on the arrow buttons to see tabs which do not fit.



Note: Call Settings is not available with all versions of the client software and the tabs shown will be dependent upon the Connector Client version and the user's assigned services.

7.1 Call Forwarding Tab

Use this tab to set the available call forwarding options, including **Forward Immediate**, **Forward When Busy**, **Forward on No Answer**, and **Forward When Unavailable**, along with the number of rings to allow at your desk phone before forwarding to the number you defined.

Call forwarding

Enter the number that you want to forward calls to:

Forward immediate 8512

Forward when busy 8513

Forward on no answer _____

Forward when unreachable _____

Number of rings

7.2 Anywhere Tab

Define additional phone numbers where your incoming calls will also ring, and set the behavior (enable, diversion inhibit when transferring, answer confirm, call control code, etc.) for each.

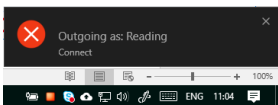
Anywhere

This service allows you to configure additional phone numbers where you want to receive incoming calls.

Alert all locations

Number	Enable service	Diversion inhibit	Answer confirm	Call control	Description
01234567890	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

7.3 Outgoing As Tab



Connector can be setup to change the caller ID number presented to a called party, for an outgoing call made from a BroadWorks Call Center to recipients within the same country*.

1. Open Call Settings
2. Select the **Outgoing As** tab
3. Choose and define either Automatic or Manual options:

- **Automatic Selection** – Click to add a checkmark to enable Connector Client to automatically select the call center DNIS number presented to the called party from one of the numbers listed in the grid below.
- **Show When Dialing** - When selected, a notification will appear in the bottom left of the screen detailing the Call Center number (DNIS) being presented. Note: Only effective when "Automatic selection" is selected.

Outgoing as
This service allows you to automatically select the number you present when making outbound calls.

Automatic selection Show when dialing

Matching: Same area code Nearest area code

Number to use (manual selection):

Number	Name	Location	Service user
<input checked="" type="checkbox"/> <Default>	<Default>	<Default>	<Default>
<input type="checkbox"/> 01414960529	Glasgow	0141 Glasgow	Example_Setup...
<input type="checkbox"/> 01184960210	Reading	0118 Reading	Example_Setup...

DND
If you activate this service all inbound calls will be blocked by the server.

Enable service

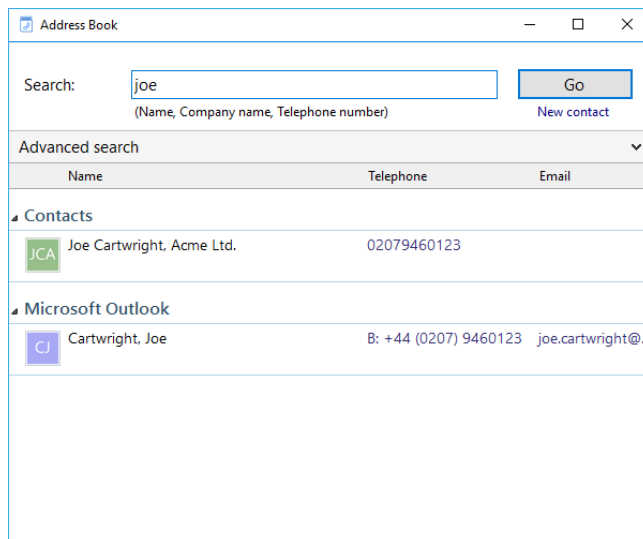
Hide Number
You can hide your number when calling other parties. Enable the service to hide your number.

Enable service

- **Matching** – Click to select either the Same area code or Nearest area code matching criteria.
- **Manual** - Click within a checkbox in the table grid to select the associated number to use when calling out within the list or choose Default.

8. ADDRESS BOOK WINDOW

The **Address Book** window is accessed from the Address Book item on the main Presence menu or by clicking on the tray menu icon. It provides access to a local address book that is included with the client. It is searchable and can be added to when the user wishes to include new contacts.



8.1 Address Search

Enter the text to search for within the contacts.

Search:
(Name, Company name, Telephone number)

8.2 New Contact

[New contact](#) Click this link to add a new contact record to the local Address Book.

8.3 Advanced Search

Click this button to show advanced options for further filtering of the search results.

Advanced search ▼

If you get too many results back, you may want to consider further restricting your search by using the Advanced options.

Users can filter by address fields such as town or postal code (Where), other

fields (What) and the specific database where you think the contact might be currently stored (Source).

Advanced search

What: (Type, Notes)

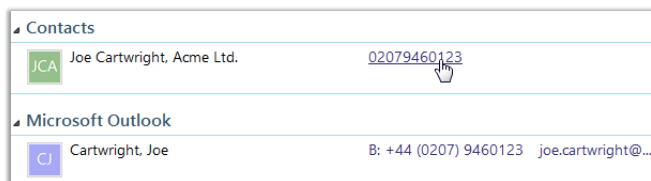
Where: (Street, Address, Town)

Source: (All)

Name	Telephone	Email
Joe Cartwright, Acme Ltd.	02079460123	
Cartwright, Joe	B: +44 (0207) 9460123	joe.cartwright@...

8.3.1 Search Results

Click on the telephone number of a contact to dial them.

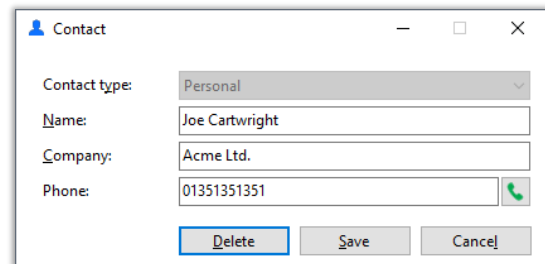


8.4 Contact Records

Contact Records may be opened from the Preview Window, Call History, and the Address Book.

It displays directory information from various sources including the Group/Enterprise and Common directories where a match is made against a number for a received or made call.

All fields within the Contact Record view can be searched. You can also interact with some of the boxes to make a call, send an email, etc. if that data has been entered.



The screenshot shows a window titled "Contact" with the following fields and buttons:

- Contact type:** Personal (dropdown menu)
- Name:** Joe Cartwright
- Company:** Acme Ltd.
- Phone:** 01351351351 (with a green telephone icon)
- Buttons:** Delete, Save, Cancel

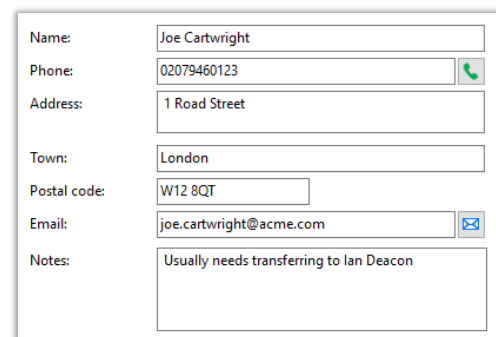
8.4.1 Personal and Group Contacts

8.4.1.1 Contact Type

This is used to change the format of the Contact window. Different "types" have different templates. Pick the one that best represents the contact entry that you are creating.

8.4.1.2 Contact Details

Enter the contact's information into the Name, Phone, Address, Email, and Notes boxes.



The screenshot shows a window with the following fields and buttons:

- Name:** Joe Cartwright
- Phone:** 02079460123 (with a green telephone icon)
- Address:** 1 Road Street
- Town:** London
- Postal code:** W12 8QT
- Email:** joe.cartwright@acme.com (with an email icon)
- Notes:** Usually needs transferring to Ian Deacon

8.4.1.3 Dial Button



Click this button to dial the telephone stored alongside.

8.4.1.4 Email Button



Compose an email to the stored email address via your default email client.

8.4.1.5 Notes

This text entry field provides a space for entering useful information about the contact or reminders.

9. CALL HISTORY

The **Call History** window is accessed from the Call History item on the main Preview menu or from the Tray view menu. As well as reviewing recent activity, you can dial someone from here by clicking on their telephone number.

By default, the Call History screen returns up to fifty (50) of the most recent calls.

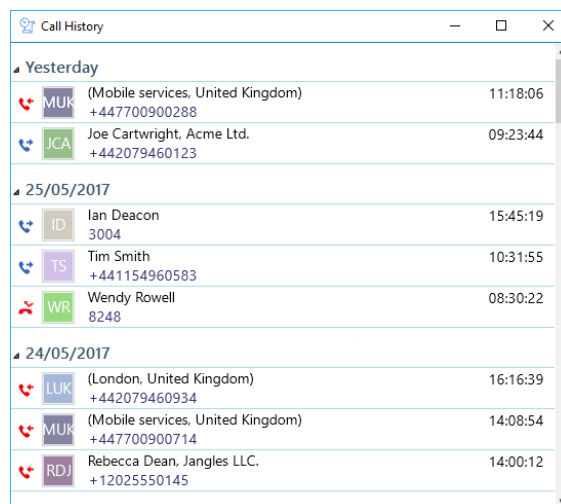
9.1 View/Add Contact

Add a new contact record to the Personal Phone List from your Call History by clicking where the name would appear (it will be a location name in brackets instead) to open the Create contact window and fill in the fields needed to create a new contact.

9.2 Hover Menu

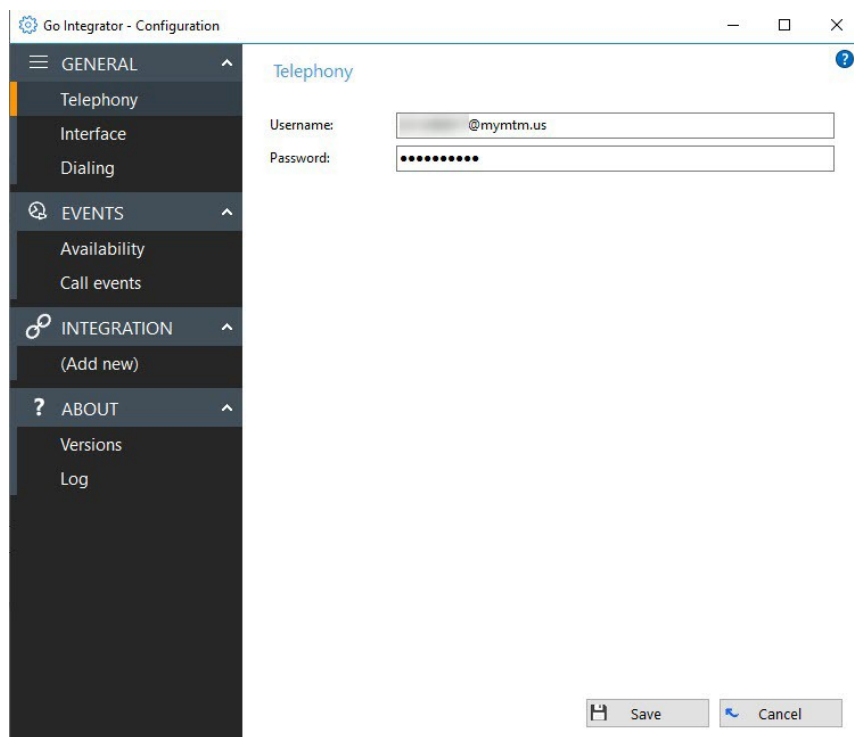
If you hover the cursor over one of the entries in your list, a useful menu of actions displays actions you may perform.

Note: Some versions of Connector either do not include or have modified implementations of this feature.



10. CONFIGURATION

Right-click on the Tray Menu icon to open the client and click on **Configuration** to display the *General, Events, Integration* and *About* sections.

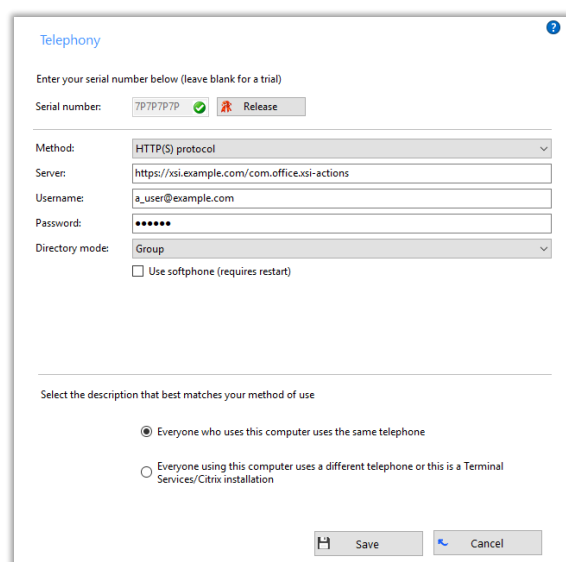


10.1 Telephony Settings

Manage available settings relating to the telephony connection. Click the **Save** button to store new/edited information.

Note: Not all settings described here are available to all users for management.

- **Server** - Please choose your corresponding Switch location (Atlanta or Philadelphia). If unsure, please contact your Account Manager or Customer Support
- **Username / Password** - Enter the username and password credentials sent to you by the provider.
(Generally formatted as: [3215551212]@XXDomain.XXXs + your active directory/assigned password).



10.2 Interface Settings

The Interface page allows you to change settings relating to the look and feel of the software, including actions that happen when calls take place and where you will go to clear the cache histories.

10.2.1 Basic Interface Settings

- **License Type** – Read-Only. Displays a license type the Connector Client uses. (LITE)
- **Application Load** – To have the software start automatically when you log on to your computer, put a checkmark in the "Application load" checkbox. The setting will take effect next time you log on to your computer.
- **Language** – Language packs are available for the software to change the language of the user interface. By default, the software will attempt to automatically select the language to use based on the language setting of your operating system. However, you can change the language used by selecting from the Language dropdown list. If your language is not in the list, contact your reseller. Any changes you make to the language will take effect next time you start the software.
- **Preview Window** – You can turn on or off the unobtrusive Preview window for all calls by placing a checkmark in or clearing the appropriate box.
- **Toolbar Window** – You can turn the unobtrusive Toolbar Window On or Off by checking or clearing the appropriate box.

10.2.2 Advanced Interface Settings

Advanced Settings allow some powerful features related to CRM Integration and call centers to be enabled.

10.2.2.1 Use Dialed Number for Searches

When enabled the caller's number will be substituted for the dialed number in the preview window. For inbound calls it uses the number dialed rather than the caller's number to search the integrated application (CRM). This is often used when a dedicated DDI/DID number is assigned to a call center queue or hunt group for a single customer. When selected the caller's number will be substituted for the dialed number in the preview window.

10.2.2.2 Include Internal Numbers in Searches

Allows extensions or numbers of 6 digits or less to be used for contact popping.

10.2.2.3 Show Full Dialed Number

Shows the full DDI/DID for calls that are not the user's own number, for example to a call center queue or hunt group (a call to one's own number shows the local extension). Often

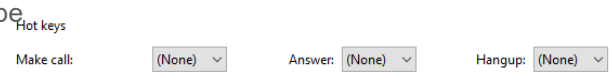
used in conjunction with "Use dialed number for searches" i.e. when the full DDI/DID is used in the contact database of the integrated application.

10.2.2.4 Prefer Call Center Number

Prioritizes the ACD telephone number and uses it as the called number when presented (ignores re- direction values). Normally required when the ACD receives the call via an IVR. Often used in conjunction with "Use dialed number for searches" and "Show full dialed number".

10.2.2.5 Hot Keys

The "Hot keys" section allows you to setup keys on your keyboard and associate them with the following actions: Call (number must be highlighted in order to dial), Answer and Hangup.



10.2.2.6 Clear Cache

The last section of the Interface page has buttons you can press to quickly and securely perform certain cache clearing actions:



- **Contact History** – Clear the history of all CRM contacts from your call history
- **Recent** – Clear recent numbers (as shown in the Recent list)
- **Hints** – Reset/Clear hints the software has already shown you to allow the software to show you the hints again.

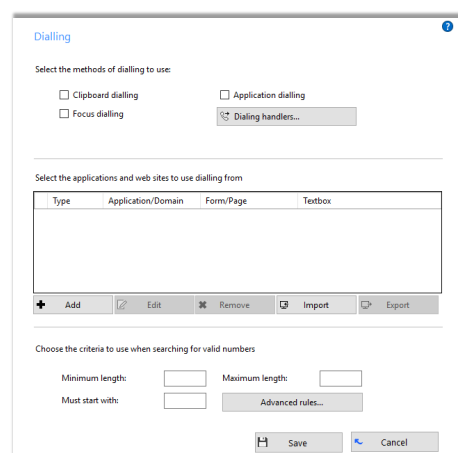
Click the **Save** button to store any new/edited information or click the **Cancel** button to discard any new/edited information.

10.3 Dialing Settings

The Dialing page allows you to turn dialing on and off from all the different types of applications that the software supports. Contact your Provider to get a detailed configuration dialing guide for the standard applications supported by Connector Client.

1. Go to [Configuration > Dialing](#).
2. **Select the methods of dialing to use** – Click within the adjacent check box(es) to Enable or Disable the following dialing methods:

- **Clipboard dialing:** A checkmark here enables Connector to dial valid phone numbers copied to the clipboard.



- **Focus dialing:** Click to enable Connector Client to dynamically recognize any telephone numbers in the textbox where the cursor is located, and to dial that number when selected.
- **Application dialing:** Click to open the Dialing Wizard to select and enable the Connector Client to dynamically add new Dial buttons to applications that you define below.
- **Dialing Handlers:** Click to open the Dialing Wizard and set up dialing handler options like Web page dialing or TAPI dialing. The handlers include:

Handler	Behavior	Suggested Usage
Internet Explorer (native)	Valid telephone numbers in IE display dial-able hyperlinks.	Use with a web-based CRM or for websites with contact details that include a telephone number.
Microsoft Edge (extension)	Edge Toolbar controls whether valid telephone numbers in Edge have dial-able hyperlinks.	Use with a web-based CRM or for websites with contact details that include telephone numbers.
Google Chrome (extension)	Chrome Toolbar controls whether valid telephone numbers in Chrome into dial-able hyperlinks.	Use with a web-based CRM or for websites with contact details that include telephone numbers.
Mozilla Firefox (add-on)	Extension turns valid telephone numbers in Firefox into dial-able hyperlinks.	Use with a web-based CRM or for websites with contact details that include telephone numbers.
TAPI driver (dial only)	Once you have enabled TAPI and configured your CRM /TAPI supported application, you will be able to dial out telephone numbers directly from your CRM application. Please note that when Skype for Business or Lync is installed, it can	For TAPI-enabled programs like GoldMine, our software provides a TAPI (dial only) driver to handle call requests from such CRMs to the telephone system.
TAPI Request	take over the Call function within Outlook causing the TAPI option to be disabled in Outlook.	If you happen to use one of this type of CRMs (e.g. Sage Line 50), our software will capture and handle the TAPI request sent by this application.
	Once you have enabled TAPI, turned on this option, and configured your CRM application, Connector Client will handle the TAPI requests and allow you to dial telephone numbers directly from your CRM application.	

CallTo Protocol	By enabling this option, Connector Client will identify the CallTo protocol and use the marked parameters (e.g. CallTo:[0123456789]) to handle the "Dial" request via our in-built PhoneHelper.exe application.	Our software can work with any type of application (e.g. Maximizer) that supports the CallTo protocol to handle call requests.
Skype for Business	Enabling this will modify the Lync / Skype for Business menu to include the option "Call using desk phone". When clicked, this option will interrogate the Lync / Skype for Business Contact Card (last option in Lync / Skype for Business) and display the numbers held in it. Click a number to dial.	If you use Skype for Business with contact details that include telephone numbers that you want to dial.

10.3.1 Dialing Applications

Any applications or webpages the Connector Client has been instructed to add Dial buttons to appear in the table.

1. Click the [Add](#) button to launch the Dialing Wizard
2. Follow the prompts to enter or select information.
3. Click [Save](#) to submit the new information.

You can use the Edit and Remove buttons to correct any mistakes you have made.

Other actions that can be performed here:

- **Export** - If you have set up some applications that you dial from and are now moving PC, you can use the Export button to save the dialing settings of the applications and webpages that you have set up in a single file named *dial.settings*.
- **Import** - If you have a *dial.settings* file and want to add the settings from it to your software, you use the Import button.
- **Dialing Criteria** - The last section on this page allows you to define what telephone numbers look like to help the software more accurately determine whether a string of numbers it sees in a webpage or on the clipboard is really a telephone number. You can tell the software the minimum and maximum length of telephone numbers (anything outside the range will be disregarded as a real telephone number), and you can also specify that telephone numbers must begin with a certain string of characters.
- **Advanced Rules** - This section allows users to implement *regular expressions* to more accurately control whether a number should be considered a valid telephone number. Recommendation: Use Advanced Rules only if you are well versed in defining Regular Expressions.

10.3.2 Dialing Configuration Wizard

The **Dialing Wizard** is used to manually configure Connector to recognize and dial from webpages that use text boxes or from within applications that the software doesn't already know how to dial from.

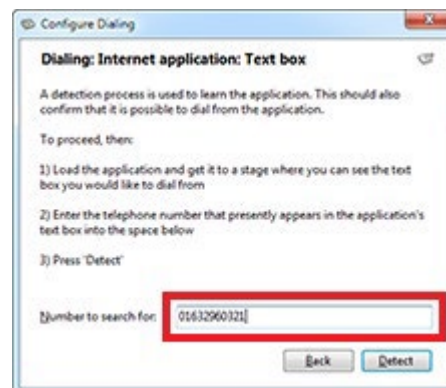
- Go to: [Configuration > Dialing](#)
- Press the [Add +](#) button to load the dialing wizard
- Follow the appropriate set of instructions below:

10.3.2.1 Detect Numbers in Web Pages and Web-based Applications

1. Select the [Internet Explorer](#) option, then choose **Text boxes**.
2. Locate a page in your application that contains telephone numbers in a text box.
3. Enter the telephone number that is shown in your application into the wizard.
4. Press the [Detect](#) button.

Connector will scan all open web pages and find the first instance of your number (you can only do one at a time).




5. Press the [Save](#) button.
6. Refresh the web page to view the Connector dial button in the field.

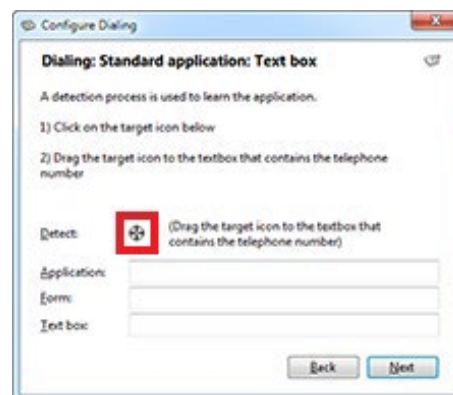


10.3.2.2 Detect Numbers in Non Web-based Applications

1. Arrange the Connector Configure Dialing view and the desired application side-by-side.
2. Select the [Any other type of standard Windows application](#) option
3. Press [Next](#) and then click [Detect](#).
4. Left-click and hold the mouse button on the target icon (next to [Detect](#)) to “grab” it.
5. Drag and drop the Detector Target icon onto the text box in your application where a phone number is stored.

Connector will indicate whether it is likely to add dialing support to the field by changing the crosshair icon to Good, Bad or Don't know to identify whether it detects the number.

-  Good
-  Bad
-  Don't know



6. Press [Next](#) when Connector identifies the field.
7. Press [Close](#) to save and return to the configuration page.
8. Press [Save](#) to update the new configuration settings for future use.
9. Now, close and reopen the application to see if Connector includes a dial button or

Dial/Hang Up icons next the number in the field within the application you just defined for use.

When Connector detects the number field correctly, you may continue to repeat the steps above to allow Connector to detect additional number fields within this application, as needed.

Note: If a field is not detected at all, the selected text field type is not supported, and the clipboard method should be used for this field within the application.

10.3.3 Dialing Add-Ons

Manage Add-Ons and configure web page dialing for Microsoft Internet Explorer, Edge, Google Chrome, Mozilla Firefox and Opera web browsers in those applications.

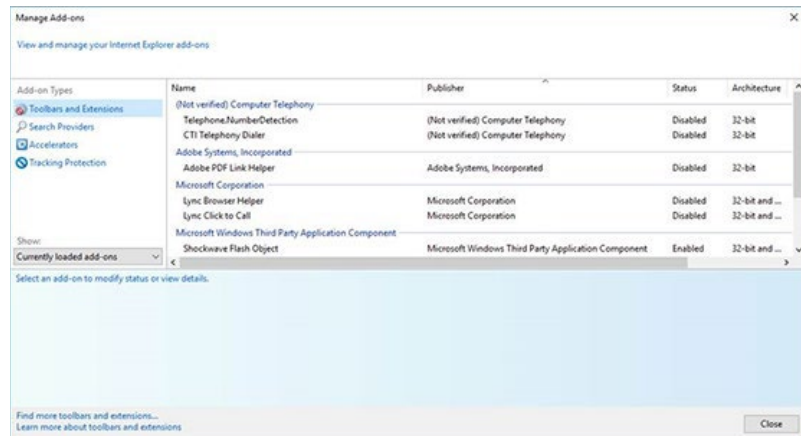
10.3.3.1 Microsoft Internet Explorer Dialing

Connector **automatically** installs an add-on within the Internet Explorer browser: "CTI Telephony Dialer" which can be viewed and managed from the "Manage Add-ons" menu.

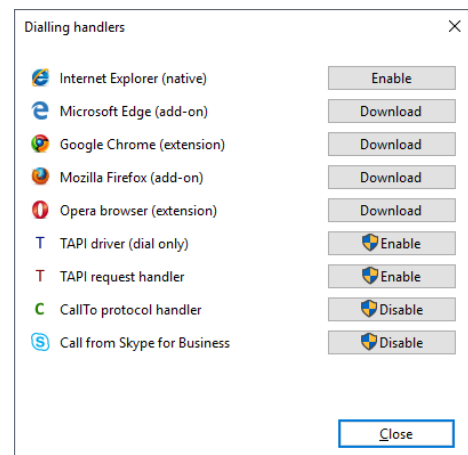
Microsoft's CTI Telephony Dialer is a browser extension that scans through web pages to find telephone numbers and converts them to clickable hyperlinks that you can dial.

You can enable/disable the CTI Telephony Dialer Add-On via:

- The Dialing handlers within the Connector client
- or
- Within the Internet Explorer Manage Add-ons menu



Note: Opening a web page (URL) from a browser shortcut pinned to the Windows Taskbar will disable web page dialing on any page opened in this way.

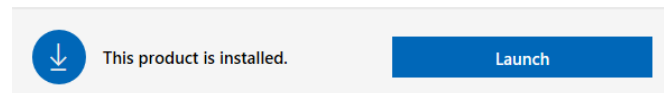
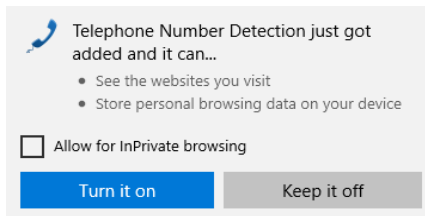
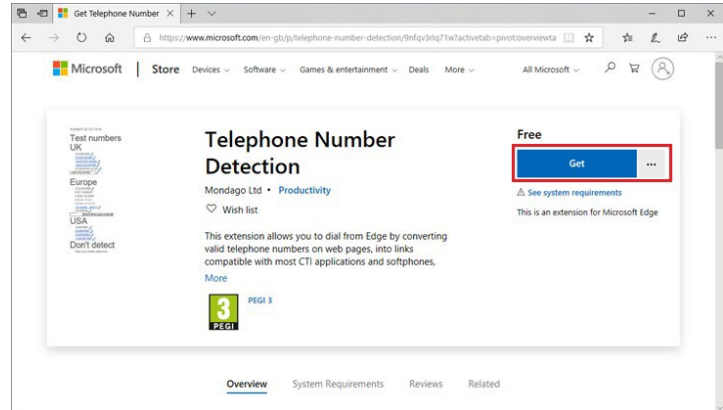


10.3.3.2 Microsoft Edge Dialing

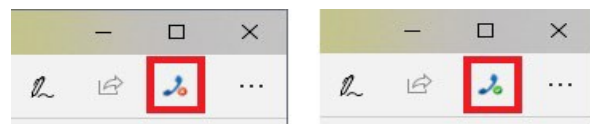
The Telephone Number Detection extension for Edge turns valid telephone numbers into dial-able hyperlinks. Download and Installation of the extension via the Edge Web Store will cause the extension to automatically update whenever a new version is published (unless your Edge browser has been manually configured differently).

In Edge:

1. Click on the **Download** button to open the Edge Web Store.
2. Click on the **Get** button next to the "Telephone Number Detection" extension.
3. Launch the extension.
4. Click on the Edge **"Turn it on"** message when prompted.



Once the extension has been added, a small blue telephone icon will be added to

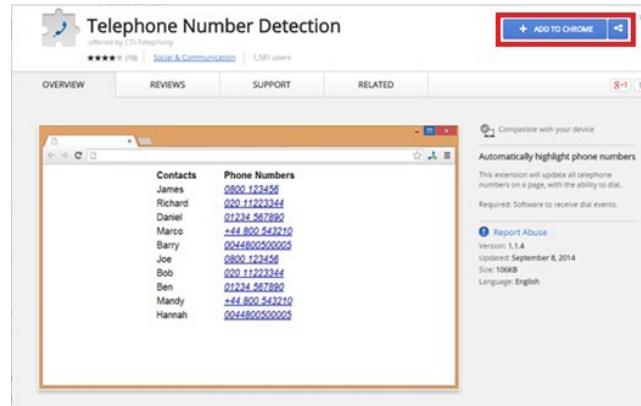


the Edge toolbar.

After installing and enabling this extension you will be able to control it via the "On/Off" (green/red) telephone icon in the Edge toolbar.

10.3.3.3 Google Chrome Dialing

Dialing handlers provides option to download 'Telephone Number Detection' extension for Google Chrome. This extension turns valid telephone numbers into dial-able hyperlinks. Installing the extension via the Chrome Web Store will cause the extension to automatically update whenever a new version is published (unless Chrome browser is configured differently).



To download this extension:

1. Click on the [Download](#) button to open the Chrome Web Store.
2. Click [Add To Chrome](#) next to the Telephone Number Detection extension option.
3. Click [Add](#) when prompted.

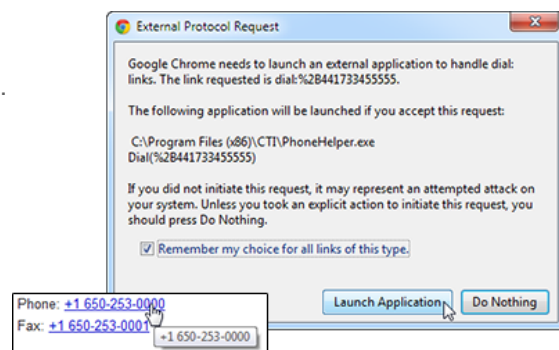
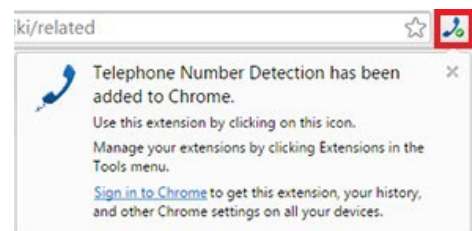
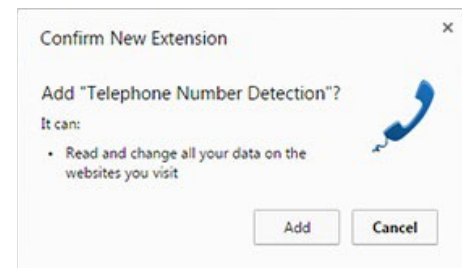
Once the extension has been added, a small blue telephone icon will be added to the Chrome toolbar.

After installing and enabling this extension you will be able to control it by the "On/Off" (green/red) telephone button.

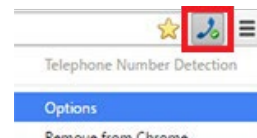
Chrome will now be able to identify numbers and convert them into hyperlinks that you can click and dial.

Note: The first time you use web page dialing in Chrome, a window may pop up with a message about external protocols.

4. Click the [Remember my choice for all links of this type](#) check box to prevent the message from reappearing.
5. Click on [Launch Application](#) to dial the number.

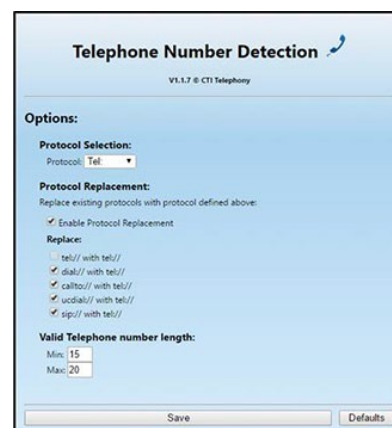


6. **Setup Options:** Right-click on the small blue telephone icon
7. Click on the **Options** menu item.



- **Protocol Selection:** Select the telephony protocol for the extension to use.
- **Protocol Replacement:** If conflicts occur, you can check the "Enable Protocol Replacement" option to replace existing protocols with the one selected in the "Protocol Selection" box. The individual protocols to replace can be selected by checking the appropriate boxes in the "Replace" section.
- **Valid Telephone Number Length:** Enter the minimum and maximum number of digits a telephone number can contain in order to be recognized as a telephone number by the extension.

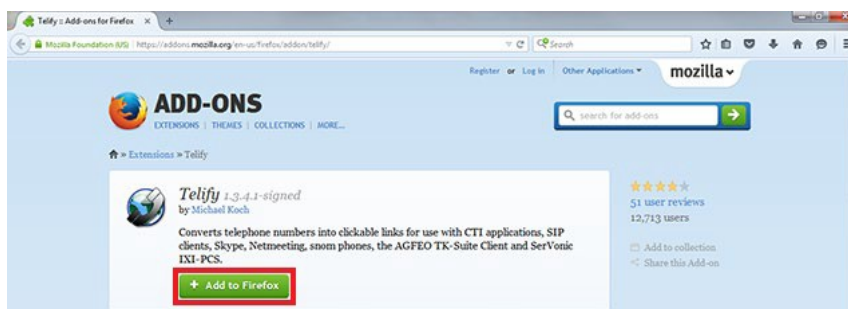
8. Click the **Save** button to store any changes, - Or click **Defaults** to restore the settings to their default values.



10.3.3.4 Mozilla Firefox Dialing

Dialing in Mozilla Firefox is achieved with the assistance of CTI-Telephony's "Telephone Number Detection" add-on which can be downloaded from the Dialing Handlers window.

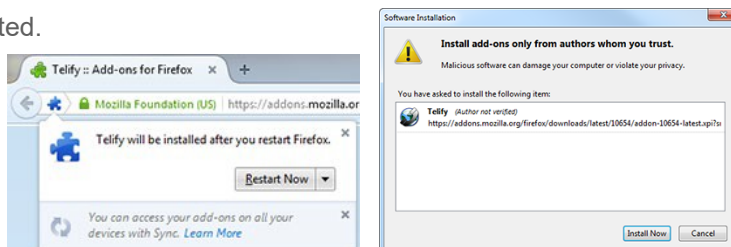
1. Click on the **Download** button and **Mozilla Firefox** to launch the Telephone Number Detection's *Add-ons* page.
2. Click on the appropriate **Add to Firefox** option (e.g.; Telfy).



Firefox will prompt you with a permission request to allow the Add-on.

3. Click **Add** if you agree to the permissions (this is required to use the Add-on).
4. Click **Restart Now** when prompted.
5. Click **Install Now** when prompted.

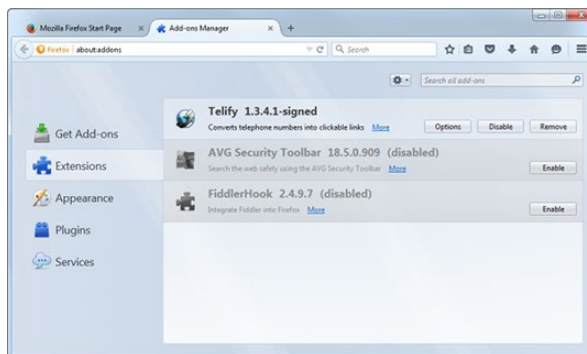
A small balloon message pops in the top-left corner of the browser telling you that the add-on has been added to Firefox.



- Click **OK** to confirm and close the message.
- Click on the Menu button (top-right corner) and select the **Add-ons** option.

A new tab will be opened that gives you access to the various extensions and plugins that have been installed.

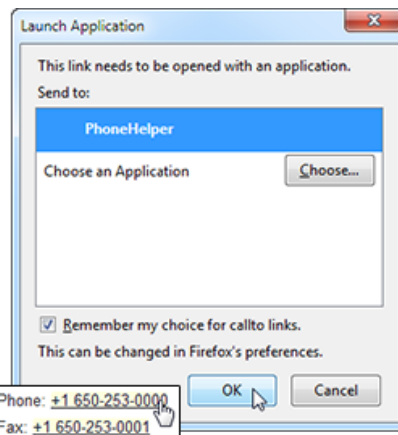
- Click the **Extensions** option to display the list where Telephone Number Detection resides. Telephone Number Detection should be enabled by default.
- If the Add-on's row is greyed out with an **Enable** button, then it is disabled. Just click the **Enable** button and then the **Restart Now** button when prompted. Firefox will restart and dialing is almost ready to go.
- Once enabled, return to Menu > Add-Ons and click the **Options** button next to Telephone Number Detection.
- User Protocol - Make sure that **callto:** is selected in the dropdown.



Send To: - Select the **PhoneHelper** option.

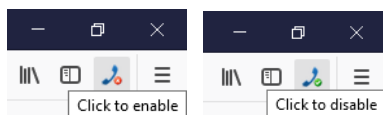
The first time you use dialing in Firefox, a pop-up message informs you that the link you have clicked on needs to be opened with an application.

- Remember my choice for CallTo links:** - Place a check in the box to disable the 'open with an application' message dialog in the future.
- Click the **OK** button to save the settings and dial the first number.



A shortcut icon is added to the task tray menu.

You may click the icon in the tray menu to Enable/Disable the dialing add-on at any time.



A **Green** ✓ checkmark means the add-on is running and will detect numbers and convert them to click-able links.

A **Red X** on the icon means the add-on is not running and will not detect numbers or convert them to links.

10.3.3.5 Opera Dialing

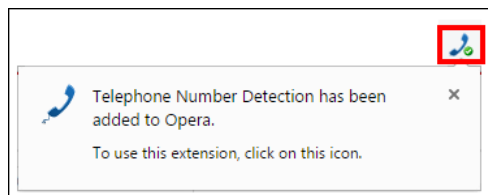
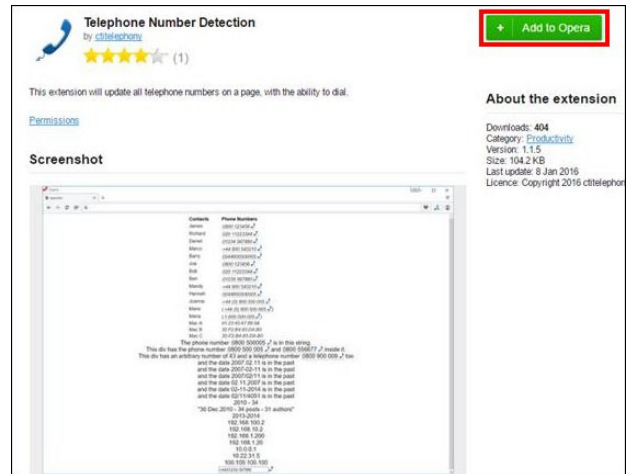
The dialing handler provides the option to download the **Telephone Number Detection** extension for Opera. This extension turns valid telephone numbers into dial-able hyperlinks.

Installing the extension using Opera's Add-ons dialog allows the extension to automatically update whenever a new version is published (unless the Opera browser is manually configured differently).

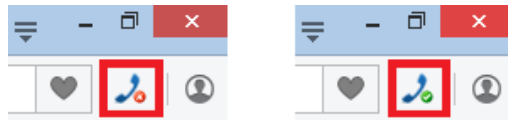
To download this extension:

1. Open Opera.
2. Click on the **Download** button to open the Opera *Add-ons* view
3. Locate the **Telephone Number Detection** extension and click on the adjacent **Add to Opera** button.

Once the extension has been added, a small blue telephone icon will be added to the Opera toolbar.



After installing and enabling this extension you will be able to control it by the "On/Off" (green/red) telephone button.

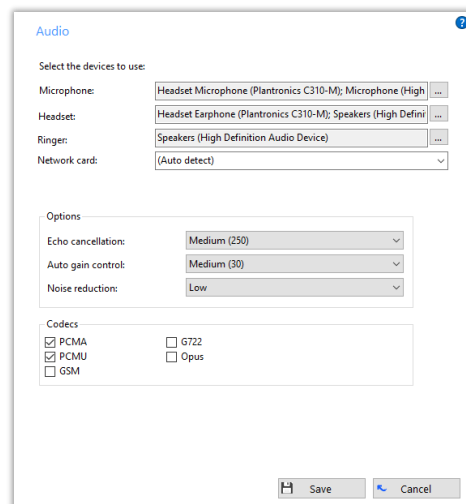


10.4 Audio Settings

Manage the devices used for audio.

- **Select Devices** – Use this section to select your audio devices for talking, listening, and ringing.
 Note: It is advisable to move your preferred audio device to the top of the list.
- **Network Card** – Auto-detect should always be tried first for the Network Card setting.
- **Options** – Contact your Provider/IT partner for assistance.
- **Codecs** – Contact your Provider/IT partner for assistance.

If audio is not working correctly, it may also be necessary to manually select the device your PC is using to connect to the LAN.



10.5 Availability Events

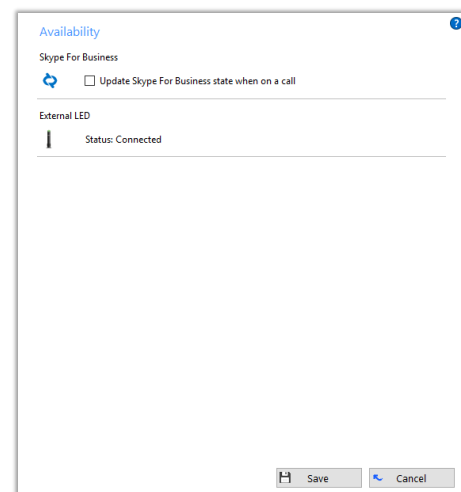
The Availability page allows you to change settings relating to the look and feel of the software, including actions that happen when calls take place.

10.5.1 Update Skype for Business

If you use Microsoft Skype for Business, Connector Client can automatically update the Microsoft Skype for Business state accordingly. Checkmark this option to enable the feature.

10.5.2 External LED

Connector Client has plug and play compatibility with External LEDs (presence) so everyone in the office can see whether a colleague is available for a conversation, busy on the phone, or simply does not want to be disturbed.



10.6 Call Events

The Call Events page allows you to change settings relating to actions taken when a call is ringing or is in progress.

10.6.1 Call Actions

You can make the software either show the Phone window or pop the contact when certain events happen. Just select the relevant action from the relevant dropdown list: On ringing, On answer, or On outbound.

10.6.2 Call Sound Selection

The Call Sound section allows you to choose a sound to have your computer play when your phone is ringing and/or you have a call waiting. This can help you to uniquely identify that it is your phone that is ringing and not a co-worker's. Please note that only audio files in WAV format are supported.

You can also checkmark the *Mute speaker when call in progress* box to have your computer's sound automatically muted whenever a call is in progress, which is useful if you listen to music or Internet radio while you work, giving you a more professional appearance.

10.6.3 External Program Call Events

The software can also be configured to run one or more custom executables on specified call events. When external programs are configured, click the **Save** button to store any new/edited information or click the **Cancel** button to discard any new/edited information.

Press the **Add** button and enter the following information:

- **Event** - Select the event on which to run the program/application.
- **Direction** - Select when it is either an incoming or an outgoing call.

The Calls lists can be used to restrict events for internal/external or both.

- **Program** - Select which executable to run. This box should be left blank to load an internet browser.
- **Parameters** - Choose the "command line arguments" for the program, or in the case of a browser, the URL to load. When using a URL, make sure that you include the URI scheme (ie HTTP://). Then you can include in the Parameters any number of values from the call. For instance, to output the caller's telephone number you can include %Call\CallerContact\Tel%.

To use the telephone number of the remote party (as opposed to the caller, who may be the local user), you can use the syntax %Call>Contact\Tel%, or you can use %Call>Contact\DisplayTel% to get the formatted number. To test, enter the term 'Message Box' in the Program entry to show a message box with the translated Parameter output.

Use following external programs when selected events occur

Event	Program	Parameters

+ Add Edit Remove Import Export

10.6.3.1 Custom Events Setup

A "custom" button can also be added to the preview window allowing a user to control application popping in the same way as for standard integrated applications.

Custom events and buttons can be used to pass call information from Connector Client to other software using command line parameters under conditions specified by you.

For example, your custom event could create a new call record in a database that automatically includes the telephone number when a call is connected.

You will need the Windows account Username and Password credentials.

10.6.3.2 Command Line Parameter Primer

For those who aren't sure what a "command line parameter" is, let's break it down with a brief run-through.

"Command line" refers to the "Command Line Interface" (CLI) which is a method of giving instructions to your computer by typing commands one line at a time to perform specific tasks like starting an application.

In very basic terms, a "parameter" is simply a definition of something e.g. name = Joe or telephone = 6329603210.

A "command line parameter" is just a parameter that is specified and used when a program is started by adding it to the end of the command line instruction that starts the program.

Another type of command line parameter called a "switch" can be used to start the associated program in a certain mode or affect it in some other way e.g. '-editmode' or '/AddNewContact'.

An example of a typical command line instruction you would type manually and how it is made up:

```
C:\Program Files\YourCRM\YourCRM.exe /AddNewContact/Phone=6329603210
```

`C:\Program Files\YourCRM\YourCRM.exe` - This section is the full file path to the app that is being started. If the command line was just this section on its own, the app would start normally.

`/AddNewContact` - This section is a switch-type command line parameter that causes the application to automatically add a new contact record when the app starts.

`/Phone=6329603210` - This section is a command line parameter that is passing information to the application which in this case is a telephone number.

When the above example is run, it would open Your CRM which would then immediately create a new contact record by itself and enter "6329603210" into the "Phone" field.

When you set up your custom event parameters in Connector Client, what you are effectively doing is using your chosen app's normal syntax except you substitute real call information with the name of the call information as in the example below. You can find the call information names and descriptions in the "Passable Call Information" section below.

`C:\Program Files\YourCRM\YourCRM.exe /AddNewContact`

`/Phone=%Call\Contact\Tel% C:\Program Files\YourCRM\YourCRM.exe` - This

section is the same as before.

`/AddNewContact` - This section is the same as before.

`/Phone=%Call\Contact\Tel%` - The phone number that was here has been replaced with the name of the specific piece of call information. Note that `"/Phone="` is still present.

Then, when Connector Client runs your custom event, it inserts the current call information into the parameters where you have specified. Please note that command line instructions and parameters are usually entered manually using the "Run" window, but you won't be doing that. Once your custom event has been set up, Connector Client takes care of everything else. Also note that the structure of a command line instruction (also called "the syntax") can vary between applications. For example, some apps' parameters start with a hyphen character (-) like "-Phone", but other apps use a forward slash (/) instead like "/Phone" etc. Whatever syntax your app uses, the principle is generally the same.

10.6.3.3 Passable Call Information

The call information that can be passed to other software is listed below:

Description	Name
The number of the person making the call (this can be you if you are making the call)	<code>%Call\CallerContact\Tel%</code>
The number of the person call is to (this can be you if you are receiving the call)	<code>%Call\CalledContact\Tel%</code>
The number of the other person you are speaking/spoke to, as given by the phone system	<code>%Call\Contact\Tel%</code>
The number of the other person you are speaking to, with the area code formatted for readability	<code>%Call\Contact\DisplayTel%</code>
The duration of the call (can only be used on events at the end of a call e.g. those using "Call Completed" triggers)	<code>%Call\DurationTotal%</code>
The unique ID of the call	<code>%Id%</code>

Remember, the call information name must always be enclosed in '%' signs to properly identify it, otherwise the information will not be passed correctly. When Connector Client runs your custom event, it inserts the call information into the parameter in place of the call info name e.g. if the other person's phone number is "6329603210", `telephone = %Call\Contact\Tel%` becomes `telephone = 6329603210`.

10.6.3.4 Chosen Application Parameters

Recommendation: review any help files or support documentation supplied with the 3rd party software to find out what can be done using command line parameters. You could also search online using your chosen app's name and "command line parameters" as keywords.

10.6.4 Call Event Configuration Prep

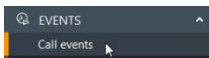
Prior to configuration, it is best to know *what should happen* and when it should happen...

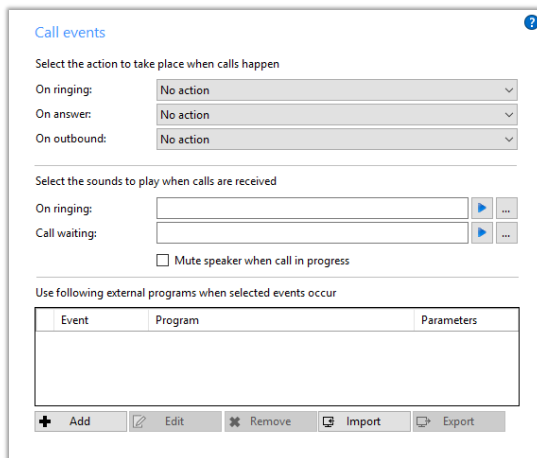
- **The call is:** Ringing, Connected, Completed, or Missed
- **Call direction is:** In or Out
- **Call is:** Internal or External

AND - Which actions or behaviors will occur...

- **Which program gets triggered** – This could be a CRM app or any other software. Please note that the passing of information between Connector Client and your chosen app will only work if the app is can receive command line parameters.
- **What information will be passed** – There are several different pieces of information that can be passed from Connector Client. These are listed in the "Passable Call Information" section along with further guidance on their use. This info can be passed to the triggered software along with any other parameters that are supported.
- **What is done with the passed information** – You may only be able to achieve a limited number of actions depending on the command line functionality of your chosen app so you should be aware of its limitations.

10.6.5 Software Call Event Configuration

1. Right-click on the Connector Client System Tray icon.
 
2. Select [Configuration > Events > Call Events](#).
3. **Select the action to take place when calls happen** from the adjacent drop-down menu:
 - On Ringing:
 - On Answer:
 - On outbound:
4. **Select the sounds to play when calls are received** using the [Ellipsis ...](#) button to upload and the [Play ▶](#) button to listen to a sample for:
 - On ringing:
 - Call waiting:
5. **Mute speaker when call in progress:** enable/disable.
6. Click the [Add](#) button. *The event details screen will be displayed.*
7. Select the required event trigger within the [Event](#), [Direction](#), and [Calls](#) dropdown boxes.



Call events

Select the action to take place when calls happen

On ringing: No action

On answer: No action

On outbound: No action

Select the sounds to play when calls are received

On ringing: [] [▶] [...]

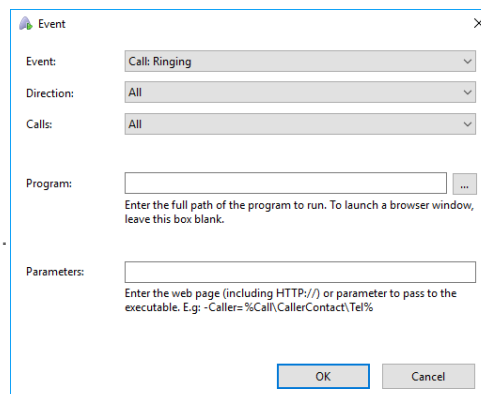
Call waiting: [] [▶] [...]

Mute speaker when call in progress

Use following external programs when selected events occur

Event	Program	Parameters

[+] Add [✎] Edit [X] Remove [📄] Import [📄] Export



Event

Event: Call: Ringing

Direction: All

Calls: All

Program: [] [...]
Enter the full path of the program to run. To launch a browser window, leave this box blank.

Parameters: []
Enter the web page (including HTTP://) or parameter to pass to the executable. E.g: -Caller=%Call\CallerContact.Tel%

[OK] [Cancel]

If the *Custom: Button* option in the *Event* dropdown is selected, enter the text to appear on the button in the new Text field.

- 8. Program:** Enter the full file path to the program you are triggering (including the executable name) or click the ellipsis ... button to navigate to and select the program.

C:\Program Files\YourCRM\YourCRM.exe

Program: ...
 Enter the full path of the program to run. To launch a browser window, leave this box blank.

If you need to launch a web page instead of a specific piece of software, leave the "Program" textbox empty. All of the internet browser-related work is done in the "Parameters" textbox.

- 9. Parameters:** Enter the required program parameters and call information to be passed to the triggered program. Any text that makes up the parameters other than the call information names will be passed to the triggered program "as is". If you were entering our example from before, you would enter:

/AddNewContact /Phone=%Call\Contact\Tel%

Parameters:
 Enter the web page (including HTTP://) or parameter to pass to the executable. E.g: -Caller=%Call\CallerContact\Tel%

If you are launching a web page, enter the full URL and any required parameters, remembering to include the "http://" before the "www".

- 10.** Click **OK** once all custom event details have been entered to keep the changes and close the dialog. *The new Event is added to the list.*

Use following external programs when selected events occur

Event	Program	Parameters
<input checked="" type="checkbox"/> Call: Ringing	C:\Program Files\YourCRM\YourCRM.exe	/AddNewContact /Phone=%Ca...

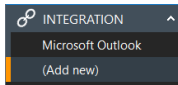
- 11.** Repeat Steps 6-10 to add as many custom events as are needed.

- 12.** Click the **Save** button to store and apply all changes.

Other actions that can be performed here:

- Edit:** Highlight the event in the list and click **Edit**. When your changes have been made, click **OK** to keep the changes and then **Save** to update the list.
- Remove:** Highlight the event in the list and click the **Remove** button to delete the event and then click the **Save** button to update the system with the change.
- Import:** To load a previously exported (saved) custom event, click the **Import** button, navigate to and select the settings file and then click the **Open** button – then click **Save** to update the list.
- Export:** Save a custom event to a local file by highlighting it in the list and clicking the **Export** button. Enter a filename and location to store the file, and then click **Save**.

10.7 Integration Settings



The Integration section allows you to review the databases set up in integration with Connector.

The Integrations section allows users to view any current telephony connections to one of the supported Business Applications that enable features such as Caller preview, Contact popping, and Address book searching.

Important Note:

In the Momentum Connector version, users have limited access to add new CRM integrations.

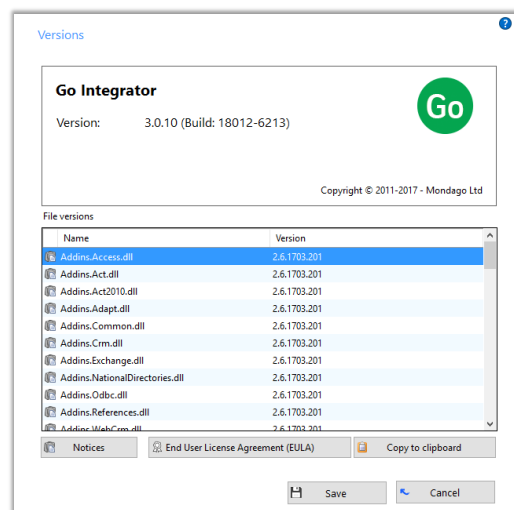
If disallowed integrations are needed, please contact your provider to request an upgrade to Momentum CRM Connector and to receive detailed configuration integration assistance for the standard applications supported by that client.

11. VERSIONS

The Versions page lists the version used for each component part that makes up Connector along with tools and information that can be useful for determining whether components have updated correctly.

Most software these days consists of several small programs and libraries that form a whole, and Connector is no different.

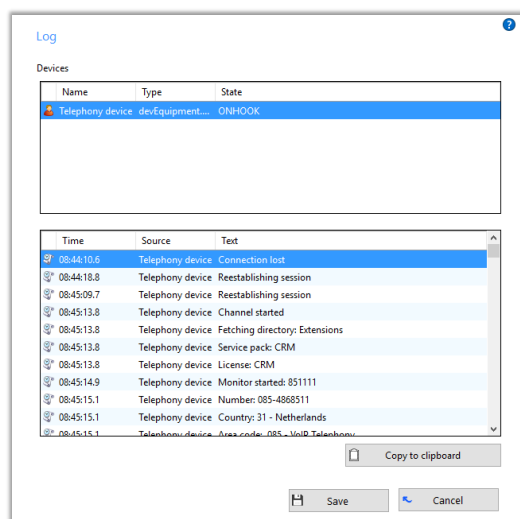
- **Notices** – Review update notifications and messages.
- **End User License Agreement (EULA)** – Review a copy of the EULA data for Connector.
- **Copy to clipboard** – click this button to copy and then paste the information straight into a document, ticket or email.
- **Save** – Click this button to save a copy of the Version data to a local file.
- **Cancel** – Click to exit without applying any changes.



12. LOG

The Log page displays information that is useful for tracking down the time of a problem. It displays 2 sections and some useful tools.

- **Devices List** – This section shows the devices that are being used with Connector. This could include hardware and any apps that you have integrated with Connector on your PC.
- **History** - The panel beneath the Devices list offers a table view of each attempted Connector action with the time, source, and error/success messages for each. This information can be very useful when troubleshooting an issue.
- **Copy to clipboard** – Click this button to copy and paste the log information into a document, ticket, or report.
- **Save** – Click this button to save a copy of the log to a local file.
- **Cancel** – Click to exit without applying any changes.



13. CUSTOMER SUPPORT

A team of expert support professionals are here to assist with technical issues, questions related to billing, feature usage, service upgrades, as well as any other general inquiries you may have. Simply contact us and a representative will help you with your request.

In order to provide optimal support, we recommend that the Account Owner (or an Authorized Contact) submit a ticket online or contact us via our toll-free support number regarding any critical or timely issues that may require troubleshooting. And always keep your account number handy to help us better assist you when you need us.

Support by Phone: 1 888.538.3960

Live phone support is available **24/7** for emergency assistance.

Online Support: www.GoMomentum.com/support

Documentation: www.GoMomentum.com/mu

Momentum University (MomentumU) is a free online knowledge base of training and support content on the Momentum Telecom website. The Momentum University library is easy to use and offers the latest information about Momentum's best-in-class cloud services and features. The helpful information provided here includes product guides, user guides, FAQs, videos, and quick reference tools to help you do what you do.

Additional Training:

Instructor-led training courses (LIVE web-based) are available upon request for products or services purchased from Momentum Telecom.

Authorized contacts for the organization can connect with your Momentum Account Manager, Project Manager, or Customer Support to find out about the course offerings, and to request a session for you and your team. They will ensure that a friendly representative of the Corporate Training team will contact you to assist with scheduling the training you need at a convenient time.

