



Help Guide

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System Tray

partnerCRM is launched through the associated partner desktop software client via a specific launch command syntax. When partnerCRM is running, a system tray icon is displayed. The icon and software name can be customized to your own branding:



If partnerCRM needs to be shutdown or restarted, the partner desktop software client controls the process via unloading command syntax.

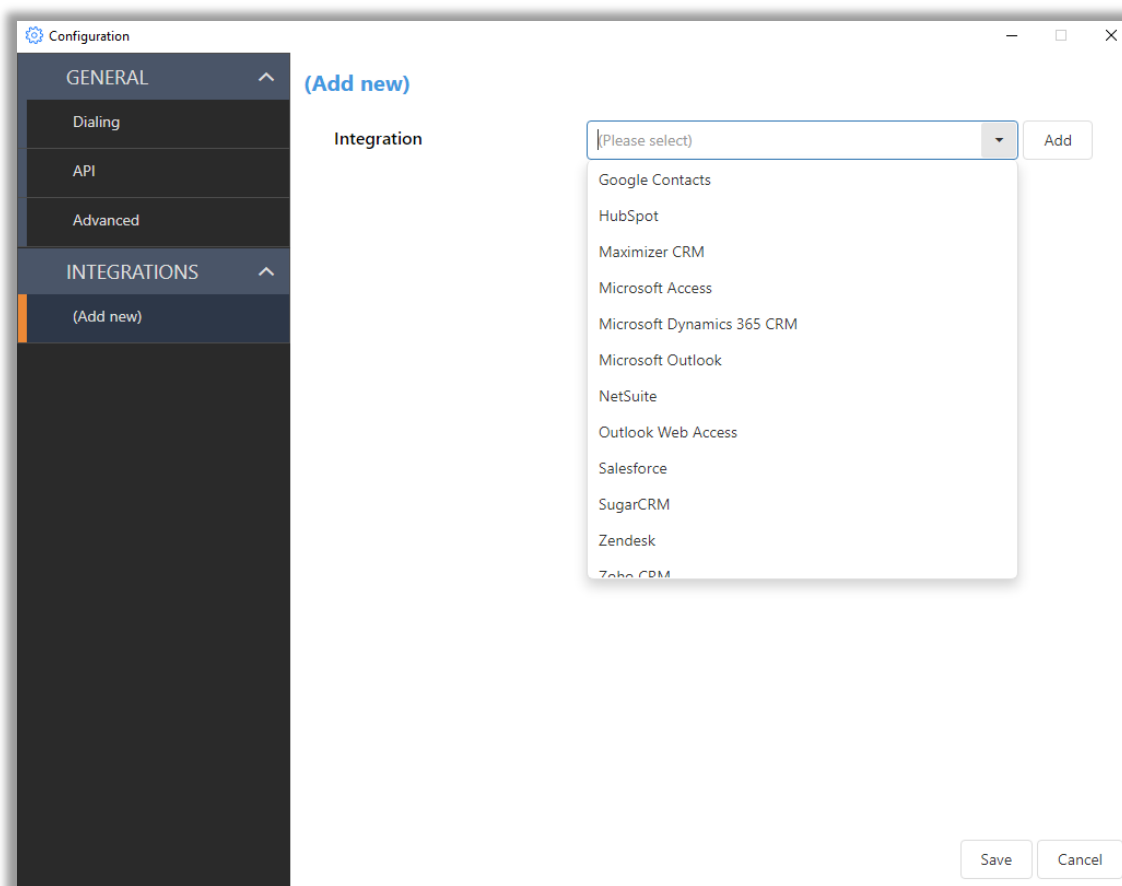
Features

- **CRM integration**
 - Connect to CRM business applications for address book searching and contact popping
- **Dialing**
 - Enable dialling through a variety of methods from basic clipboard through to web page and in-application click-to-dial tools
- **API**
 - Controls for connection between partnerCRM and partner desktop software application
- **Advanced**
 - Application data, versions, log files etc

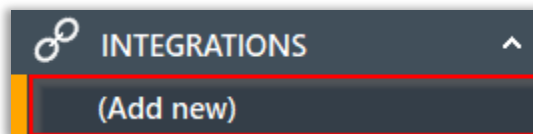
CRM Integration

CRM integrations are configured under the "INTEGRATIONS" section to connect a CRM or application with the software partner API or CTI client.

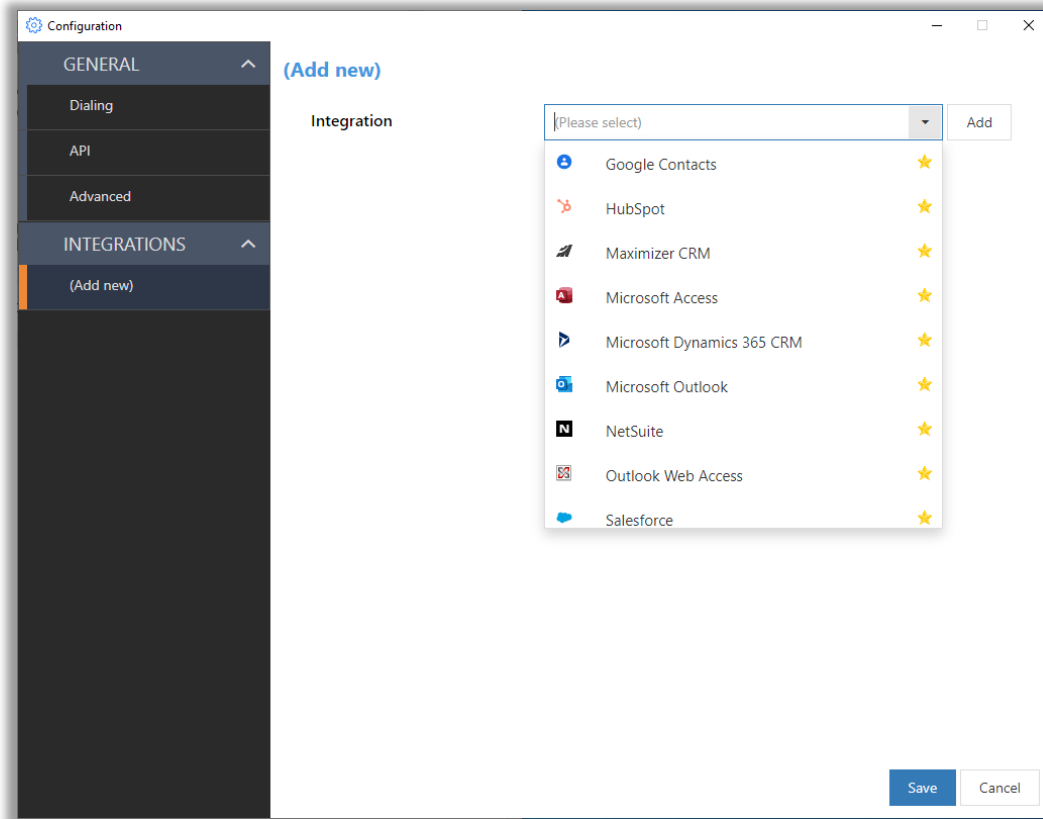
Incoming or outgoing telephone numbers are matched to contact records located in the connected CRM application. This enables features such as Contact Popping and Address Book Searching to be performed through the partner software client.



Select '(Add new)' to add a new CRM integration:



Choose the desired application from the list, and then **Add**



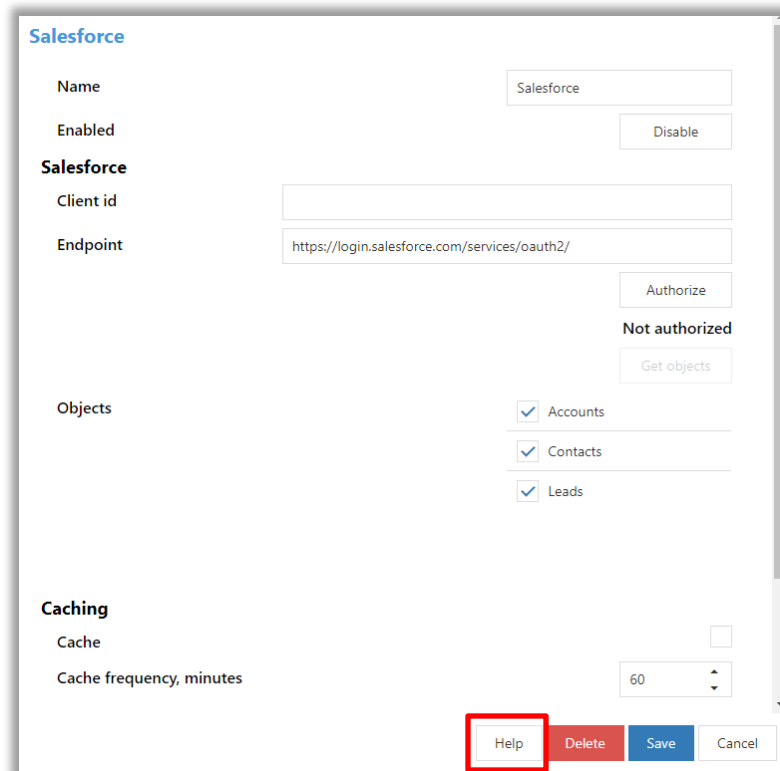
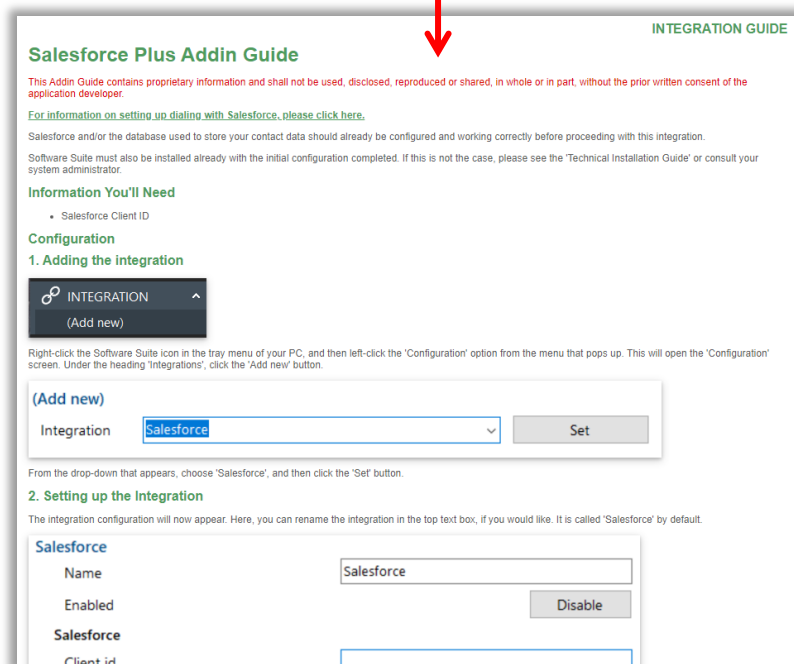
The configuration page for the selected integration is displayed, presenting the required information to connect to the specified application or database.

NOTE: Only standard Integrations will appear in the list. Other applications or 'Controlled' integrations require an unlock code.

Click here to search for supported integrations, or to request a new one:

<https://integrations.pc.mondago.com/>

For each integration listed, a detailed step-by-step help guide is available via the Help button (example shown for Salesforce):

Salesforce Plus Addin Guide INTEGRATION GUIDE

This Addin Guide contains proprietary information and shall not be used, disclosed, reproduced or shared, in whole or in part, without the prior written consent of the application developer.

For information on setting up dialing with Salesforce, please click [here](#).

Salesforce and/or the database used to store your contact data should already be configured and working correctly before proceeding with this integration.

Software Suite must also be installed already with the initial configuration completed. If this is not the case, please see the 'Technical Installation Guide' or consult your system administrator.

Information You'll Need

- Salesforce Client ID

Configuration

1. Adding the integration

INTEGRATION (Add new)

Integration: Salesforce Set

Right-click the Software Suite icon in the tray menu of your PC, and then left-click the 'Configuration' option from the menu that pops up. This will open the 'Configuration' screen. Under the heading 'Integrations', click the 'Add new' button.

From the drop-down that appears, choose 'Salesforce', and then click the 'Set' button.

2. Setting up the Integration

The integration configuration will now appear. Here, you can rename the integration in the top text box, if you would like. It is called 'Salesforce' by default.

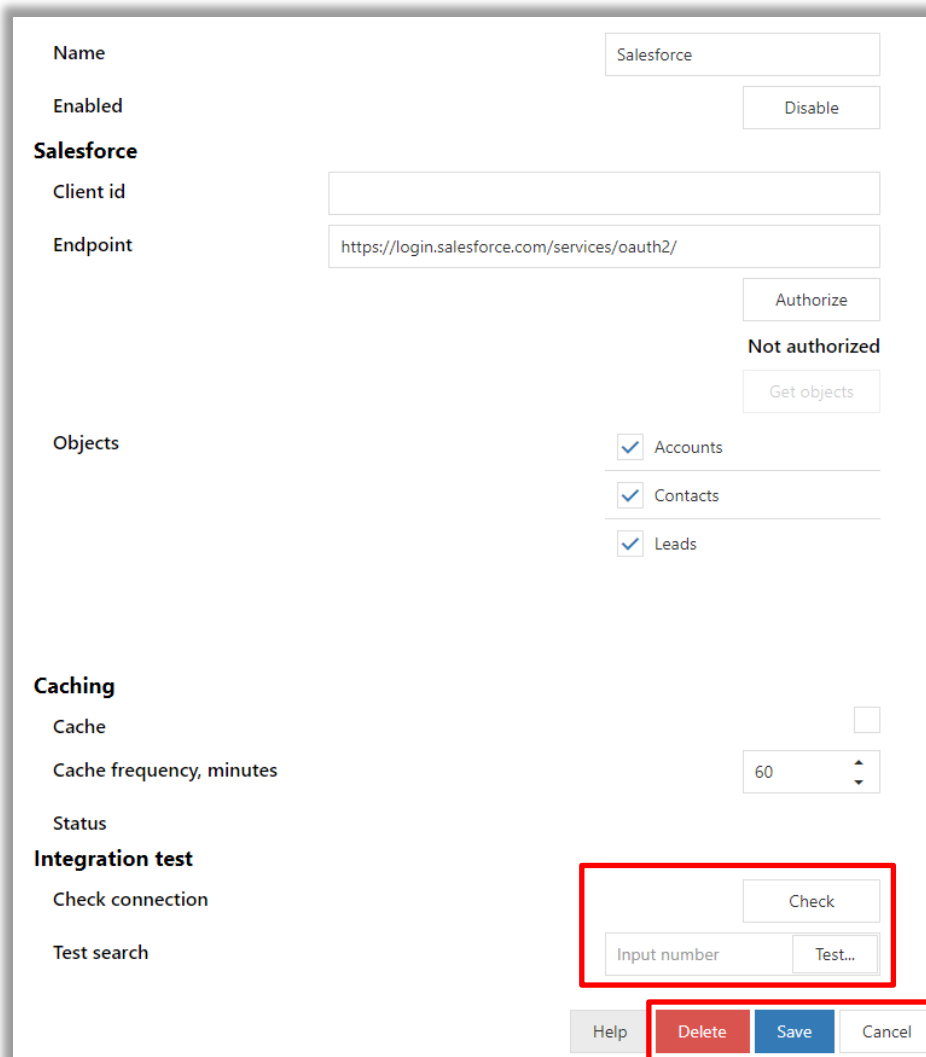
Salesforce

Name: Salesforce Disable

Enabled: Disable

Client id:

After completing the configuration steps from the Help Guide, the connection can be confirmed via the **Check** button and number matches can be verified using the **Test...** button.



The screenshot shows a configuration window for a Salesforce integration. The 'Name' field is set to 'Salesforce'. There is a 'Disable' button for the 'Enabled' status. Under the 'Salesforce' section, there are input fields for 'Client id' and 'Endpoint' (pre-filled with 'https://login.salesforce.com/services/oauth2/'). An 'Authorize' button is present. Below that, it says 'Not authorized' and has a 'Get objects' button. The 'Objects' section has three checked checkboxes: 'Accounts', 'Contacts', and 'Leads'. The 'Caching' section has a 'Cache' checkbox (unchecked) and a 'Cache frequency, minutes' spinner set to '60'. The 'Integration test' section has a 'Check connection' button and a 'Test search' section with an 'Input number' field and a 'Test...' button. At the bottom, there are 'Help', 'Delete', 'Save', and 'Cancel' buttons. A red box highlights the 'Check' button and the 'Test...' button. Another red box highlights the 'Delete', 'Save', and 'Cancel' buttons.

After completing the setup, select **Save** to store the configuration.

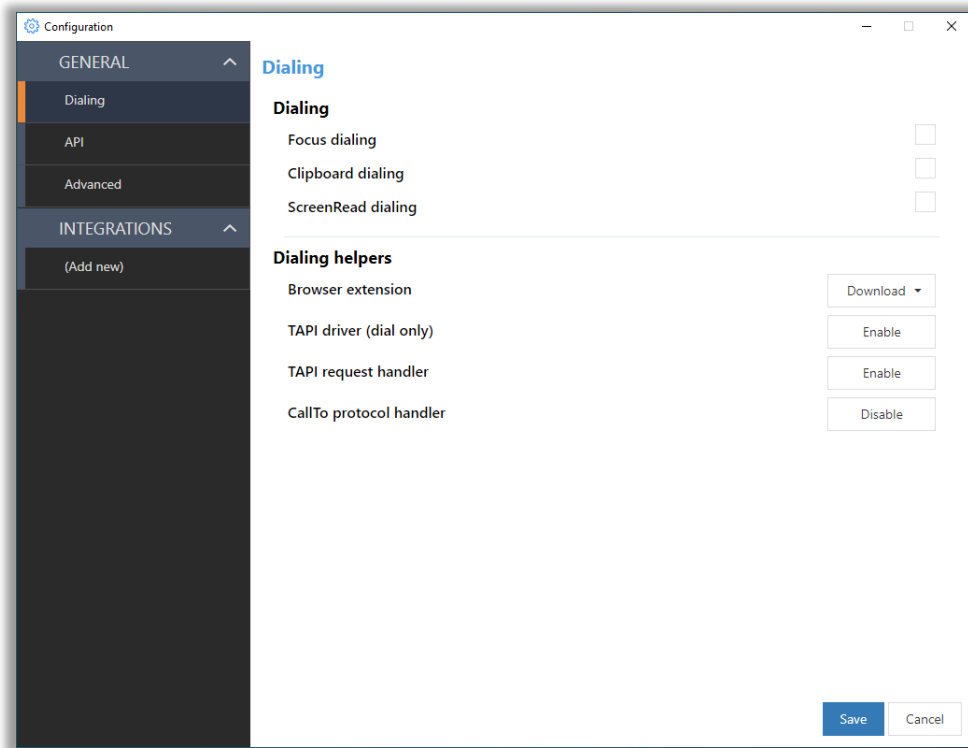
Use **Cancel** to abandon the integration configuration or **Delete** to remove a previously configured integration, if required.

NOTE: Please refer to the Integration guide specific to your application or CRM. Specific features may vary depending on the CRM or application. Test search may be unavailable with certain CRMs or applications.

Dialing

Manage outbound calling methods.

NOTE: Different dialing methods are offered for varying application types.

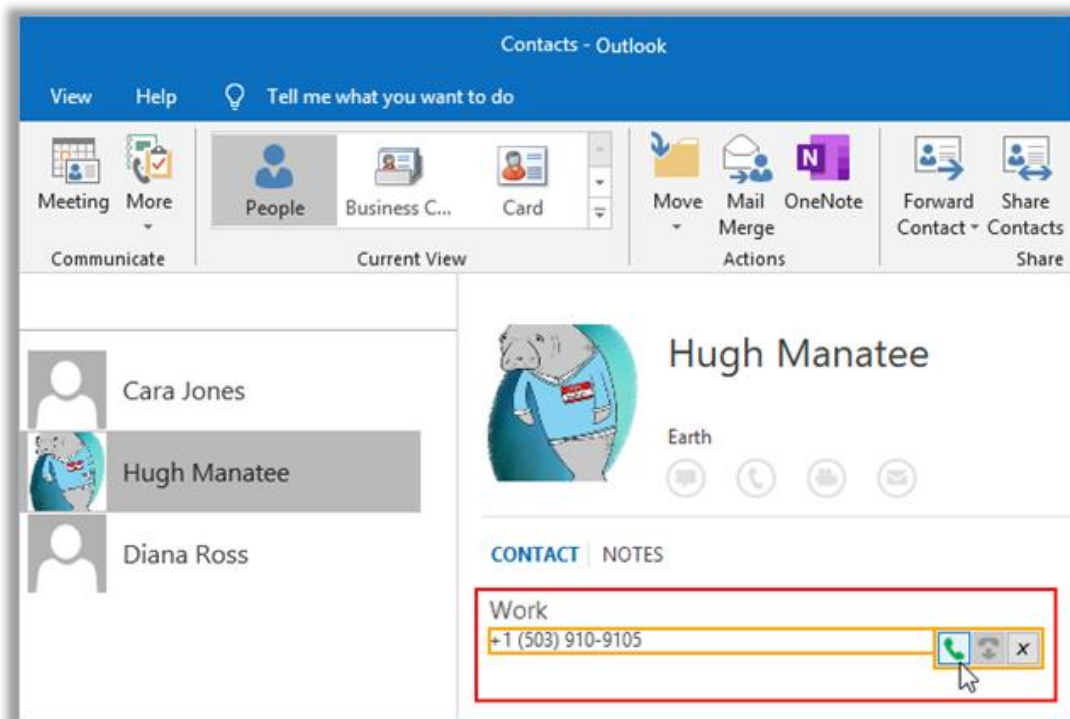


Not all applications support all dialing methods.



Focus dialing

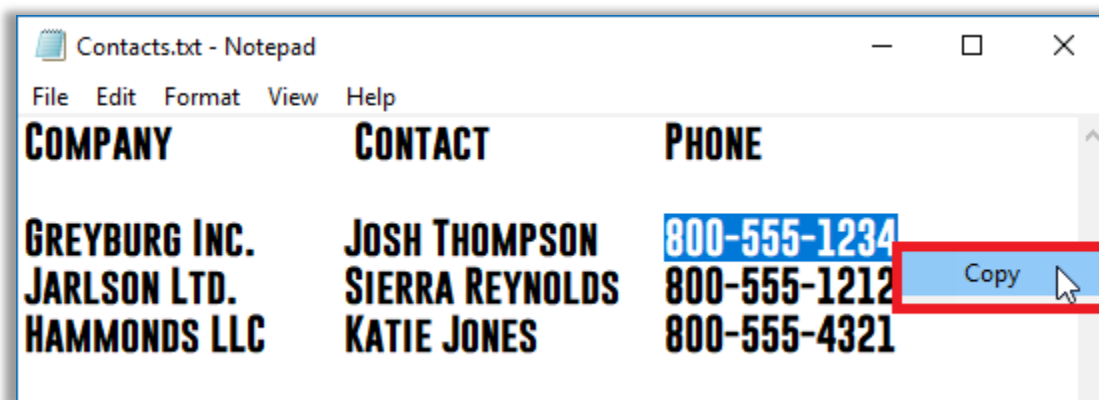
Presents a dial icon for a field in focus containing a phone number:



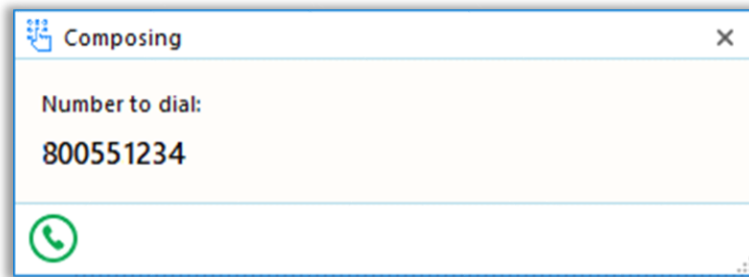
NOTE: The field must first be selected or in 'focus' for the dial icon to appear.

Clipboard dialing

Enables quick dialing by selecting and copying telephone numbers:



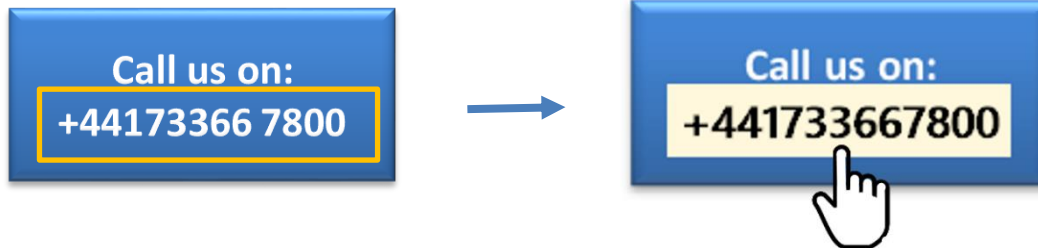
A dial pop-up prompt automatically appears when the number is copied to the Windows clipboard, either by keyboard or by mouse clicks – simply click the phone icon to make the call:



ScreenRead dialing

Allows any telephone number visible in Windows applications, documents, email signatures or even images containing phone numbers to be dialed.

Position the mouse cursor over the number to dial and hold CTRL+SHIFT to activate the "capture" box.



The "capture" box will automatically convert anything that appears to be a telephone number into a click to dial button – just click the number to dial.

NOTE: Not every image may be readable due to certain conditions – e.g. digits should be horizontal and must fit within the capture box.

Dialing helpers

Dialing helpers	
Browser extension	Download ▾
TAPI driver (dial only)	Enable
TAPI request handler	Enable
CallTo protocol handler	Enable


Web Dialing Configuration

Browser Extension

Web dialing makes outbound calls directly from a web browser. Select a web browser extension to install

Configure dialing directly from a web page for Edge, Opera, Chrome or Firefox.

Dialing helpers	
Browser extension	Download ▾
TAPI driver (dial only)	
TAPI request handler	
CallTo protocol handler	

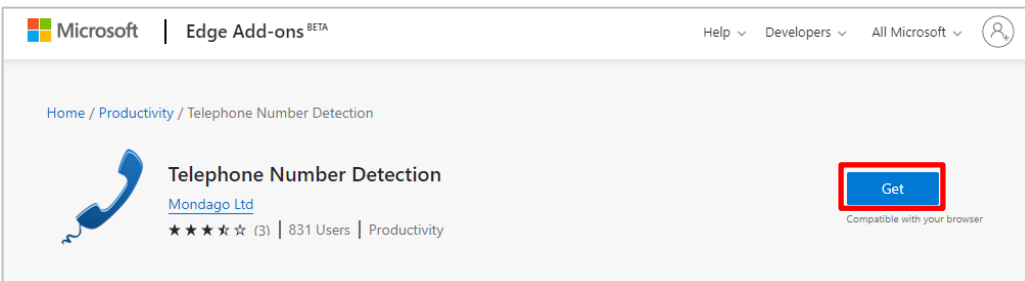
-  Edge Le...
-  Edge
-  Opera
-  Chrome
-  Firefox

Edge

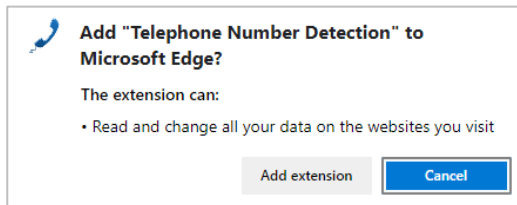
Select Edge from the list of Dialing helpers in partnerCRM configuration.

NOTE: The default Windows browser will open from this action. It is recommended to set Edge as the default Windows browser.

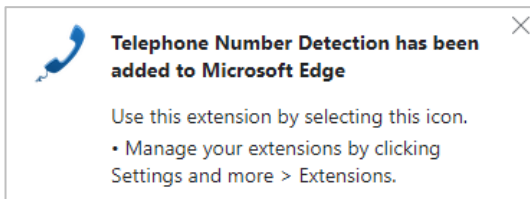
Select 'Get':



Select 'Add extension'



A confirmation will appear:



The extension is enabled by default (green):



The extension can be disabled by selecting it (red):

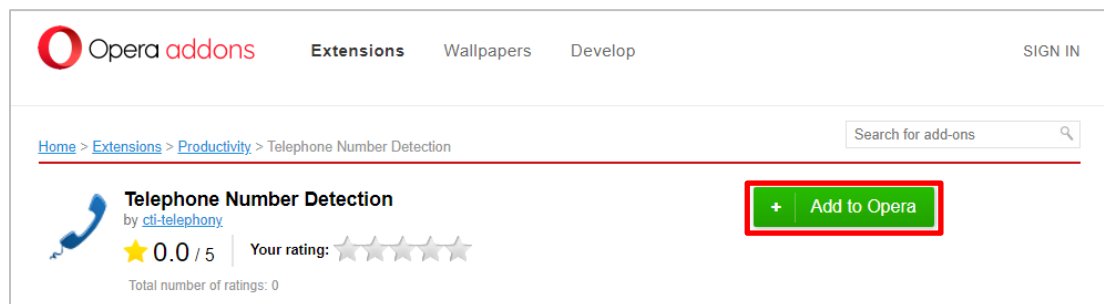


Opera

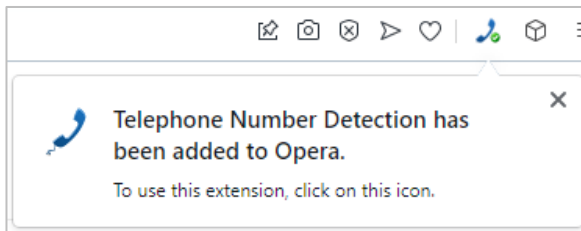
Select Opera from the list of Dialing helpers in partnerCRM configuration.

NOTE: The default Windows browser will open from this action. It is recommended to set Opera as the default Windows browser.

Select 'Add to Opera':



A confirmation will appear:



The extension is enabled by default (green):



The extension can be disabled by selecting it (red):

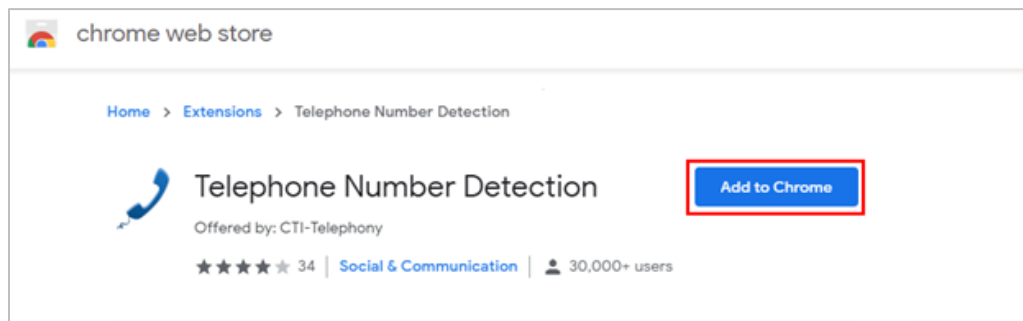


Chrome

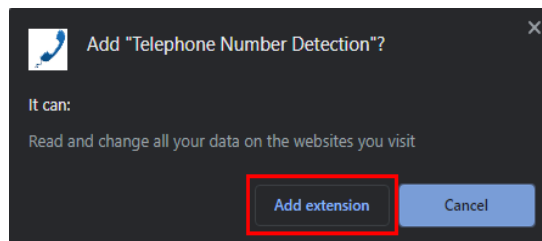
Select Chrome from the list of Dialing helpers in partnerCRM configuration.

NOTE: The default Windows browser will open from this action. It is recommended to set Chrome as the default Windows browser.

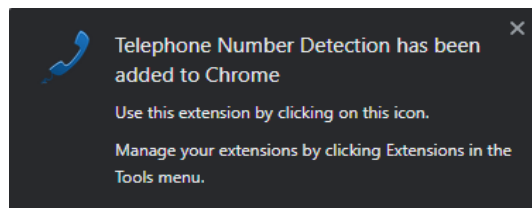
Select 'Add to Chrome':



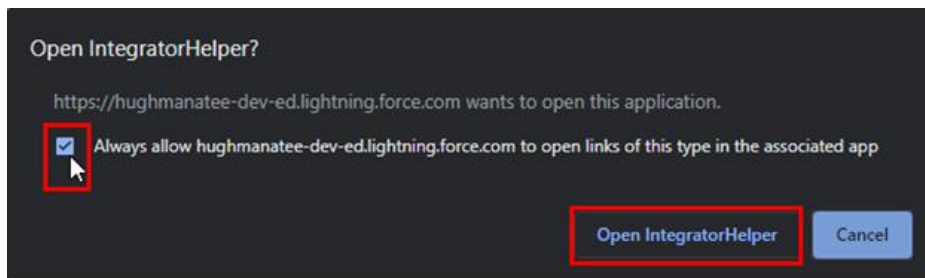
Select 'Add extension':



A confirmation will appear:



Select 'Always allow' upon initial use to remember these settings:



The extension is enabled by default (green):



The extension can be disabled by selecting it (red):

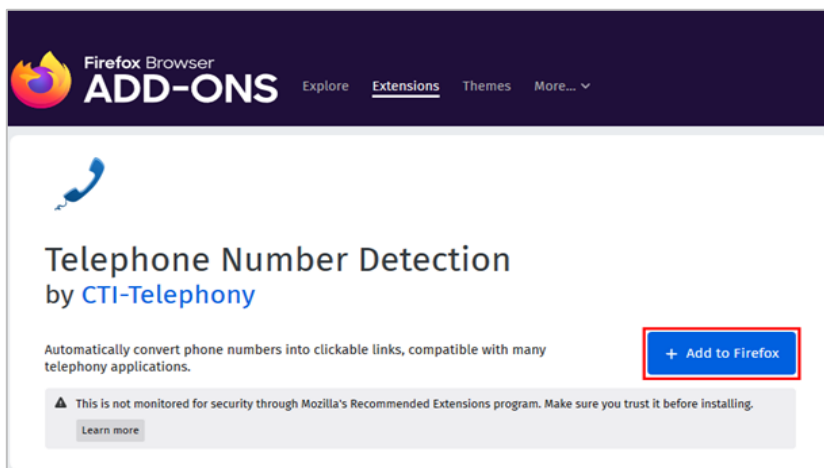


Firefox

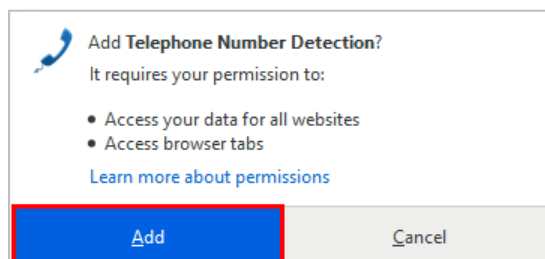
Select Firefox from the list of Dialing helpers in partnerCRM configuration.

NOTE: The default Windows browser will open from this action. It is recommended to set Firefox as the default Windows browser.

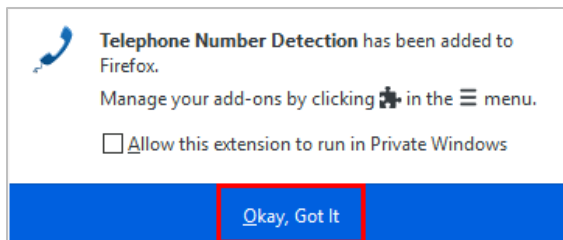
Select 'Add to Firefox':



Select 'Add':



Select 'Okay, Got It' to confirm:



The extension is enabled by default (green):



The extension can be disabled by selecting it (red):



TAPI Driver

Enable TAPI-compatible application to assist with dialing:

Enable TAPI driver (dial only), 'CallTo' protocol handler, or TAPI request handler:

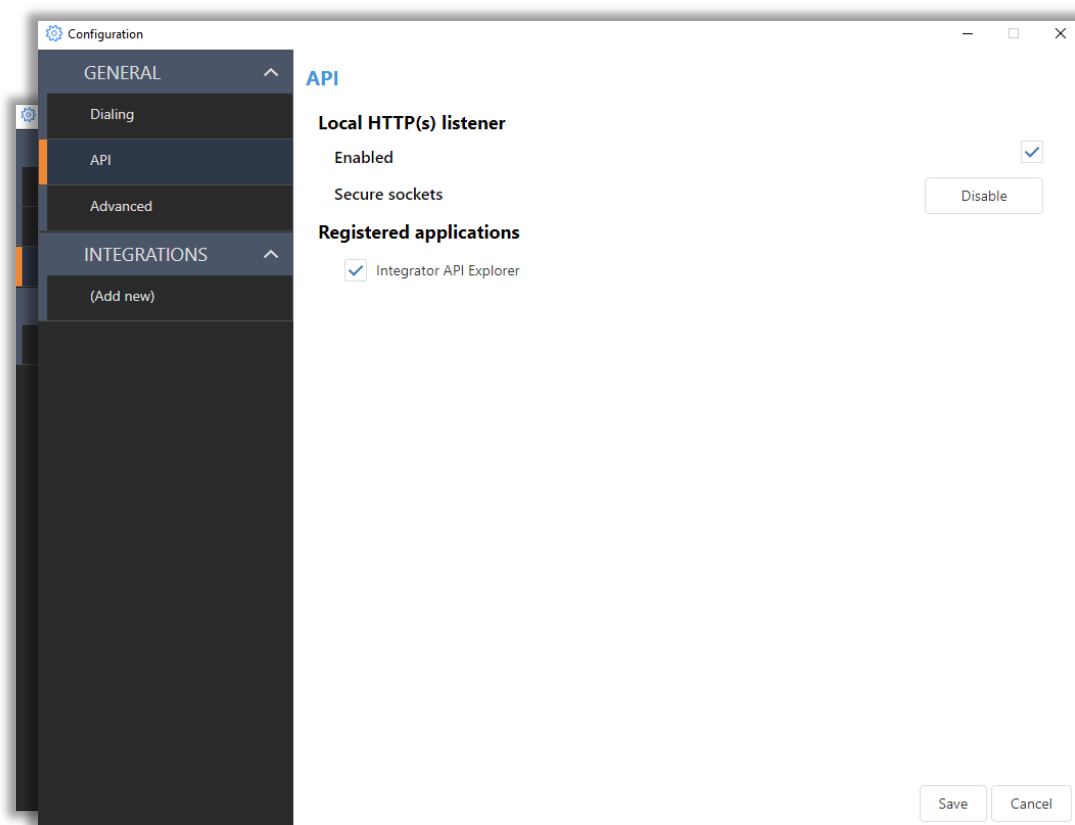
NOTE: Refer to the manual of your TAPI-enabled application to configure dialing.

API

Local Http(s) listener

For API connections:

NOTE: This setting is enabled by default.
Toggle 'Secure sockets' as enabled or disabled. Registered applications appear below.



Advanced

Language

Select display language for partnerCRM Menu.

Versions

Contains application specific version details, Notices, and EULA information:

Customer Feedback

Sends anonymous data to help improve the product:

Logs

The Log section contains important details about the software configuration:

NOTE: Depending on initial setup, not all user information will be displayed.

Select 'Show' to open the application log file location:

END OF DOCUMENT