



Mac Help Guide

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Menu Bar

partnerCRM is launched through the associated partner desktop software client via a specific launch command syntax. When partnerCRM is running, a menu bar 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.

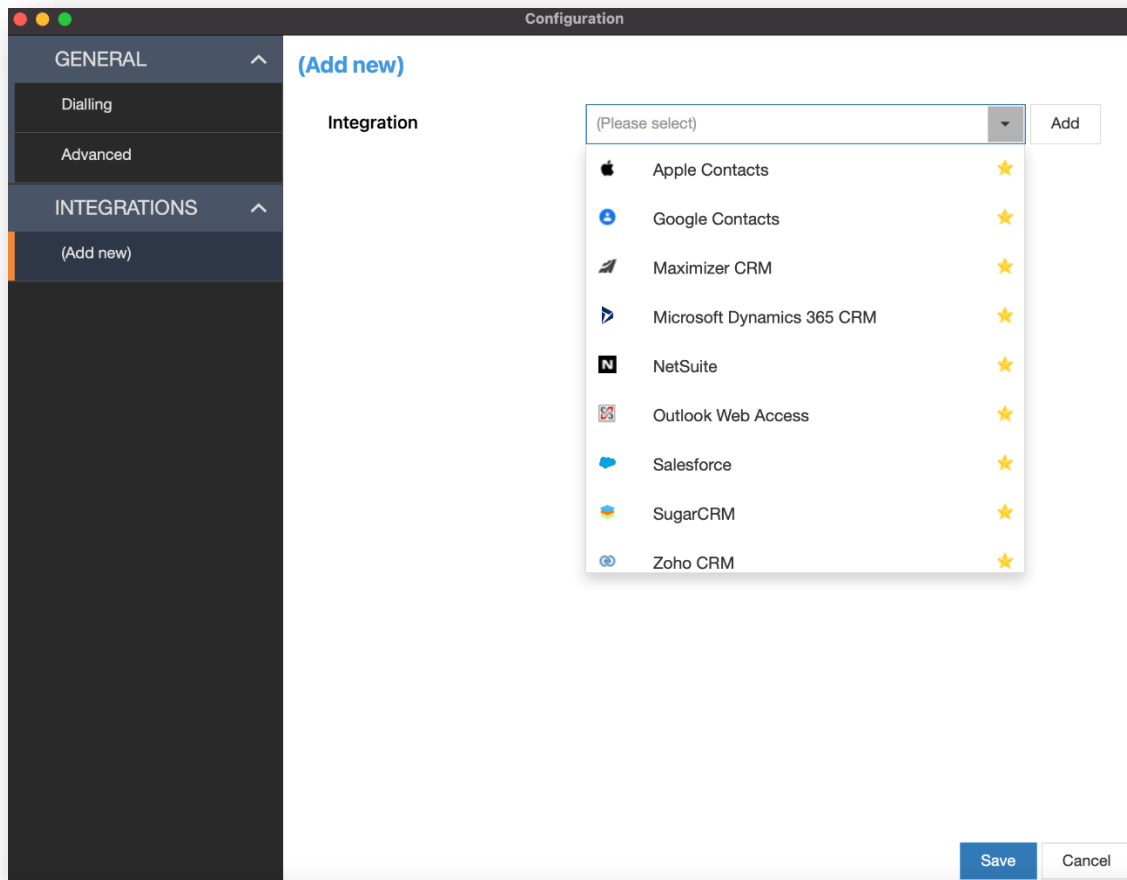
Features

- **CRM integration**
 - Connect to CRM business applications for address book searching and contact popping
- **Dialing**
 - Ability to dial through clipboard dialling
- **Advanced**
 - Application data, versions, log files etc

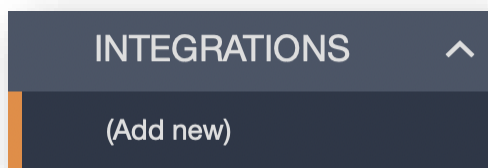
CRM Integration

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

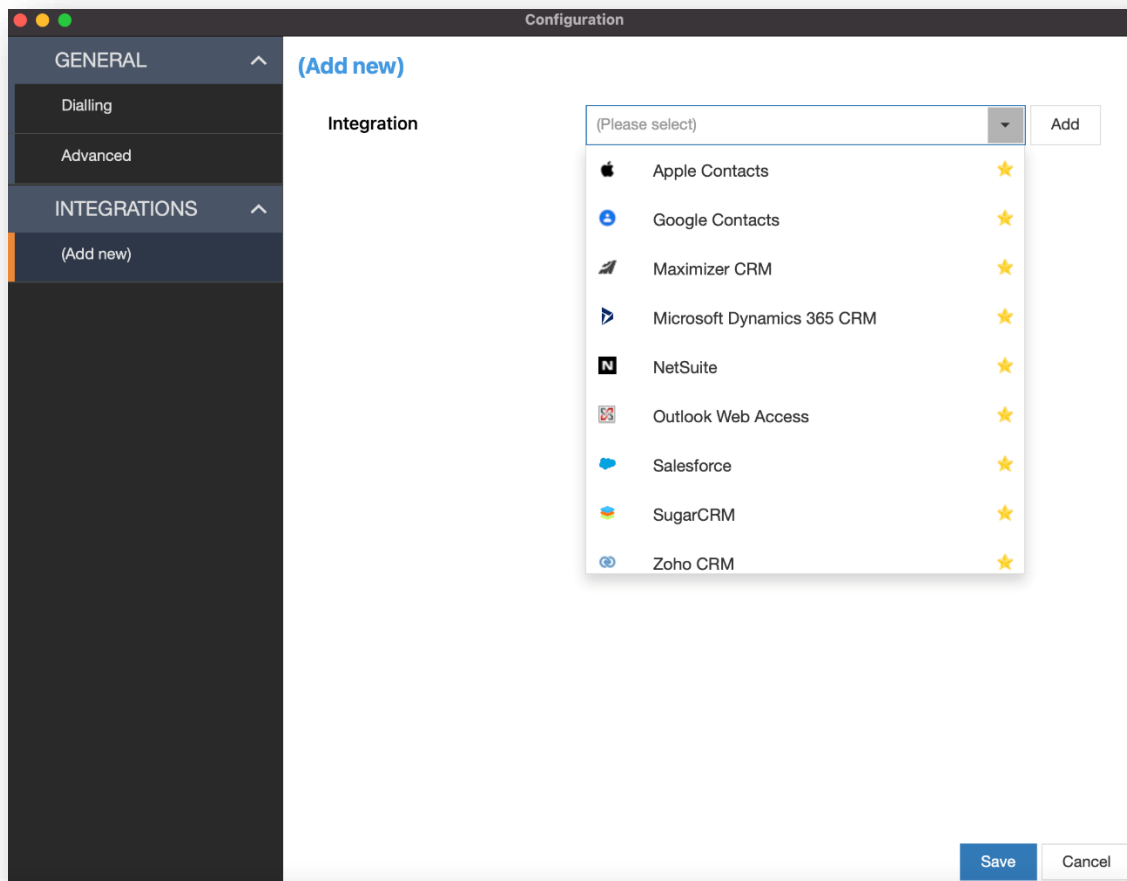
Incoming or outgoing telephone numbers are matched to contact records located in the connected CRM application. This enables features such as Contact Popping and Address Book Searching to be performed through the partner software client.



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

Name: Salesforce

Enabled: Disable

Salesforce

Client id: [Empty field]

Endpoint: https://login.salesforce.com/services/oauth2/

Authorize

Not authorized

Get objects

Objects

- Accounts
- Contacts
- Leads

Caching

Cache:

Cache frequency, minutes: 60

Help Delete Save Cancel

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)

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.

(Add new)

Integration: Salesforce Set

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

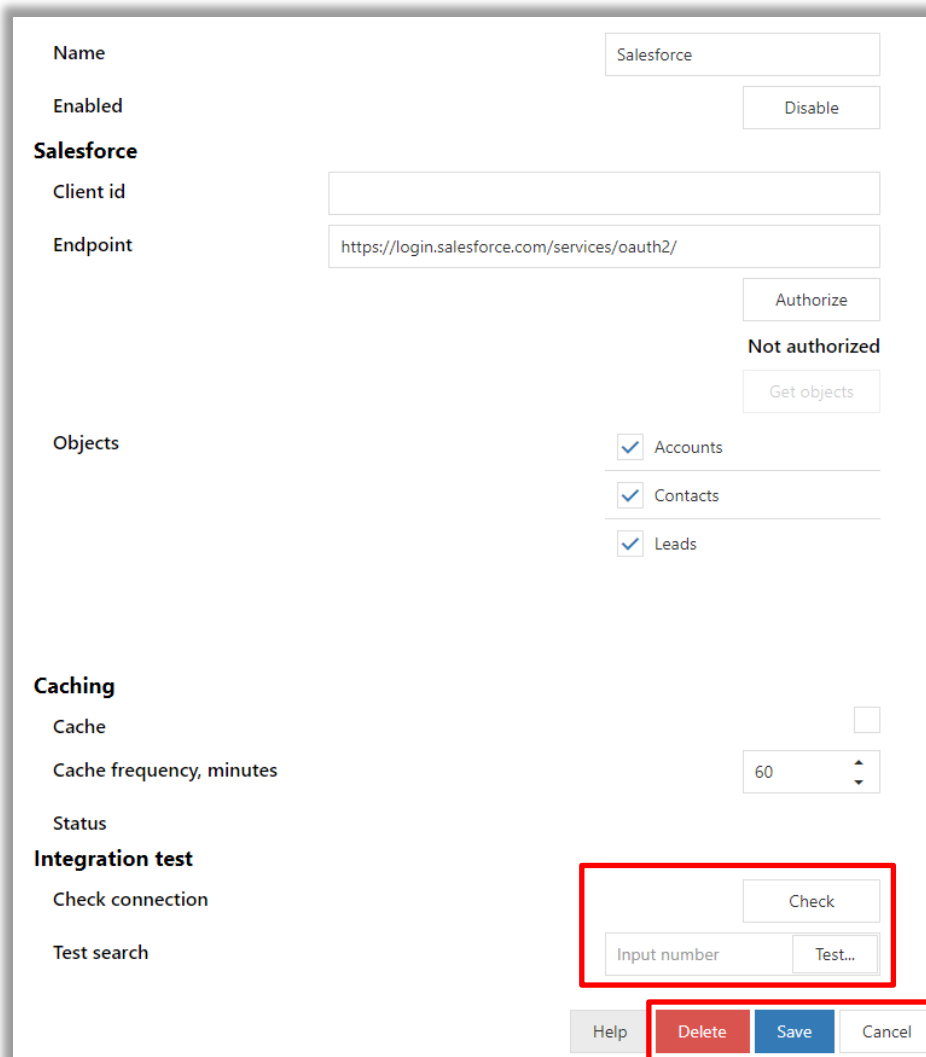
Name: Salesforce

Enabled: Disable

Salesforce

Client id: [Empty field]

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. It includes the following sections:

- Name:** Salesforce
- Enabled:** Disable
- Salesforce:**
 - Client id:** [Empty field]
 - Endpoint:** https://login.salesforce.com/services/oauth2/
 - Authorize:** [Button]
 - Not authorized:** [Label]
 - Get objects:** [Button]
- Objects:**
 - Accounts
 - Contacts
 - Leads
- Caching:**
 - Cache:**
 - Cache frequency, minutes:** 60
 - Status:** [Empty field]
- Integration test:**
 - Check connection:** [Check] [Button]
 - Test search:** [Input number] [Test...]

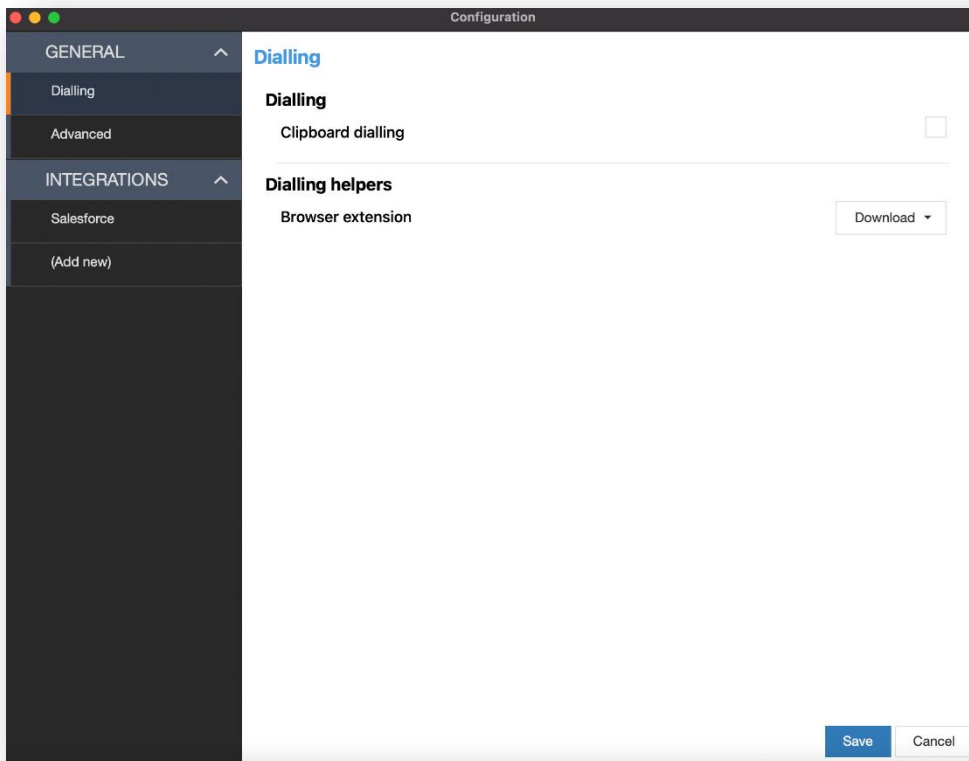
At the bottom, there are buttons for **Help**, **Delete**, **Save**, and **Cancel**.

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.

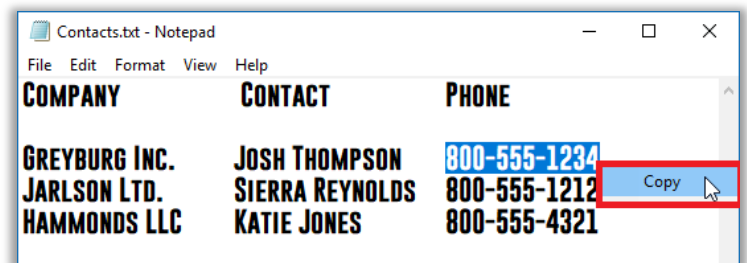
Dialing



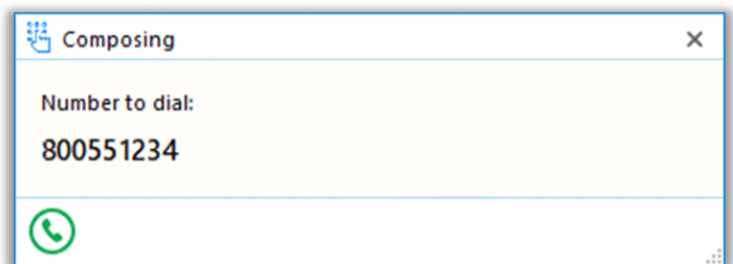
Manage outbound calling methods.

Clipboard dialing

Enables quick dialing by selecting and copying telephone numbers:



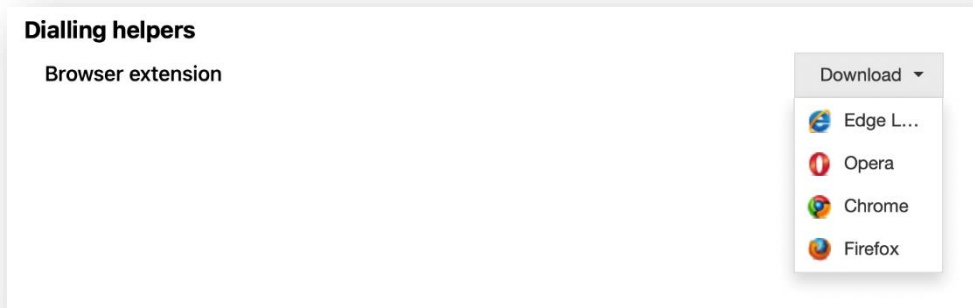
A dial pop-up prompt automatically appears when the number is copied to the clipboard, either by keyboard or by mouse clicks – simply click the phone icon to make the call:



Web Dialing Configuration

Browser Extension

Web dialing makes outbound calls directly from a web browser.



Select a web browser extension to install

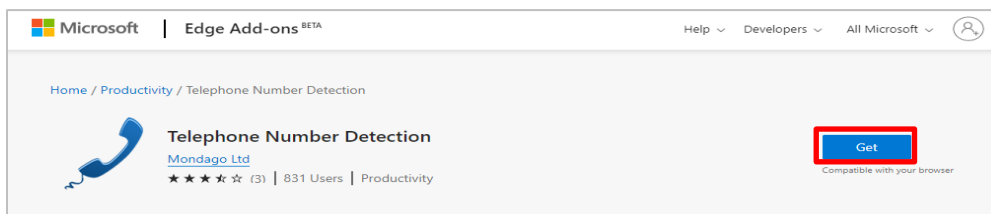
Configure dialing directly from a web page for Edge, Opera, Chrome or Firefox.

Edge Legacy

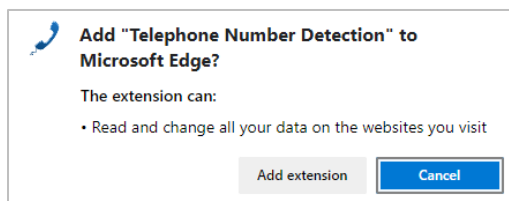
Select Edge Legacy from the list of Dialling helpers in partnerCRM configuration.

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

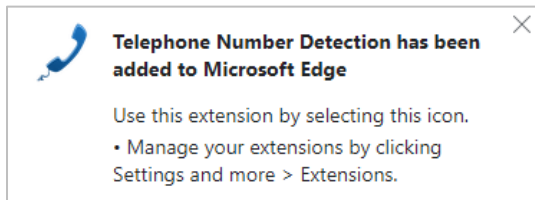
Select 'Get':



Select 'Add extension'



A confirmation will appear:



The extension is enabled by



default (green):

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

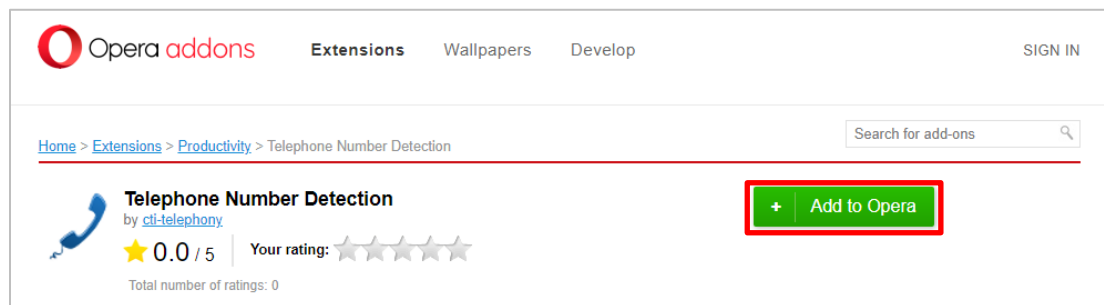


Opera

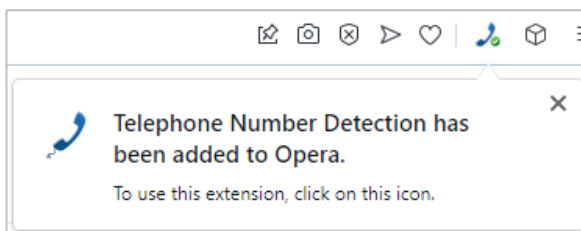
Select Opera from the list of Dialing helpers in partnerCRM configuration.

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

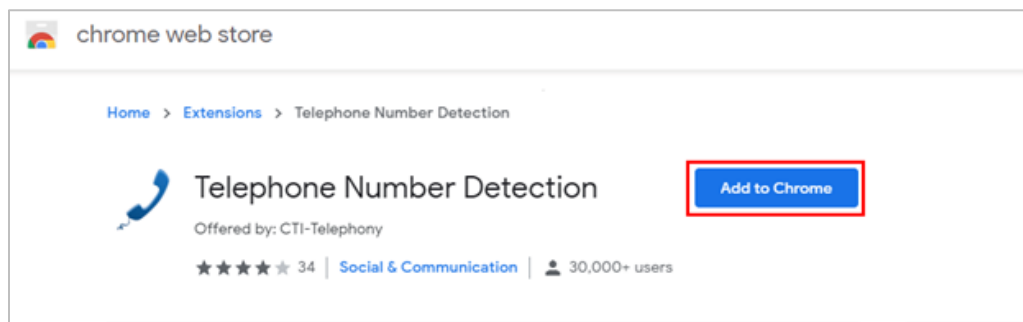


Chrome

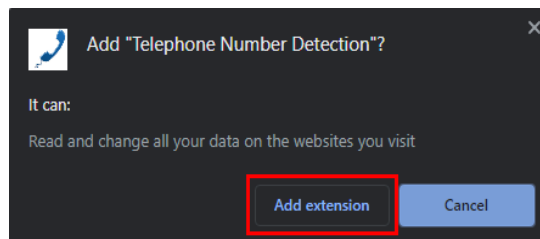
Select Chrome from the list of Dialing helpers in partnerCRM configuration.

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

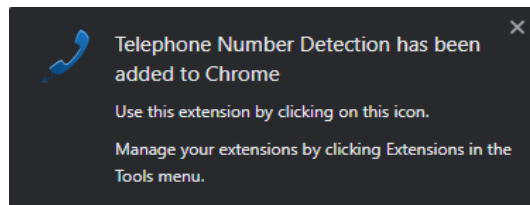
Select 'Add to Chrome':



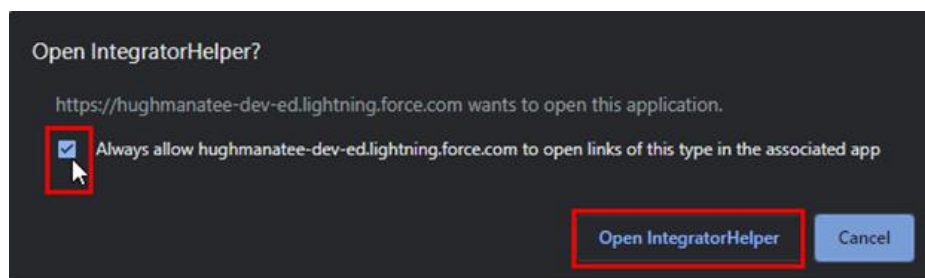
Select 'Add extension':



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):

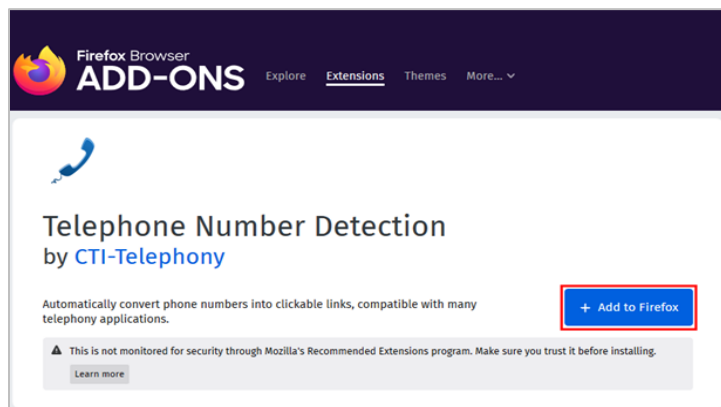


Firefox

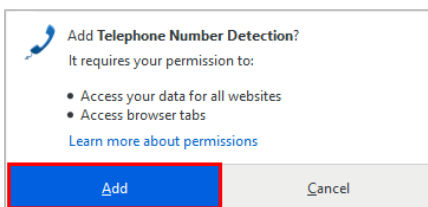
Select Firefox from the list of Dialing helpers in partnerCRM configuration.

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

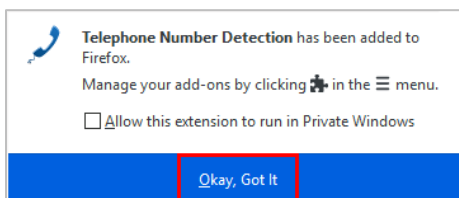
Select 'Add to Firefox':



Select 'Add':



Select 'Okay, Got It' to confirm:



The extension is enabled by default (green):

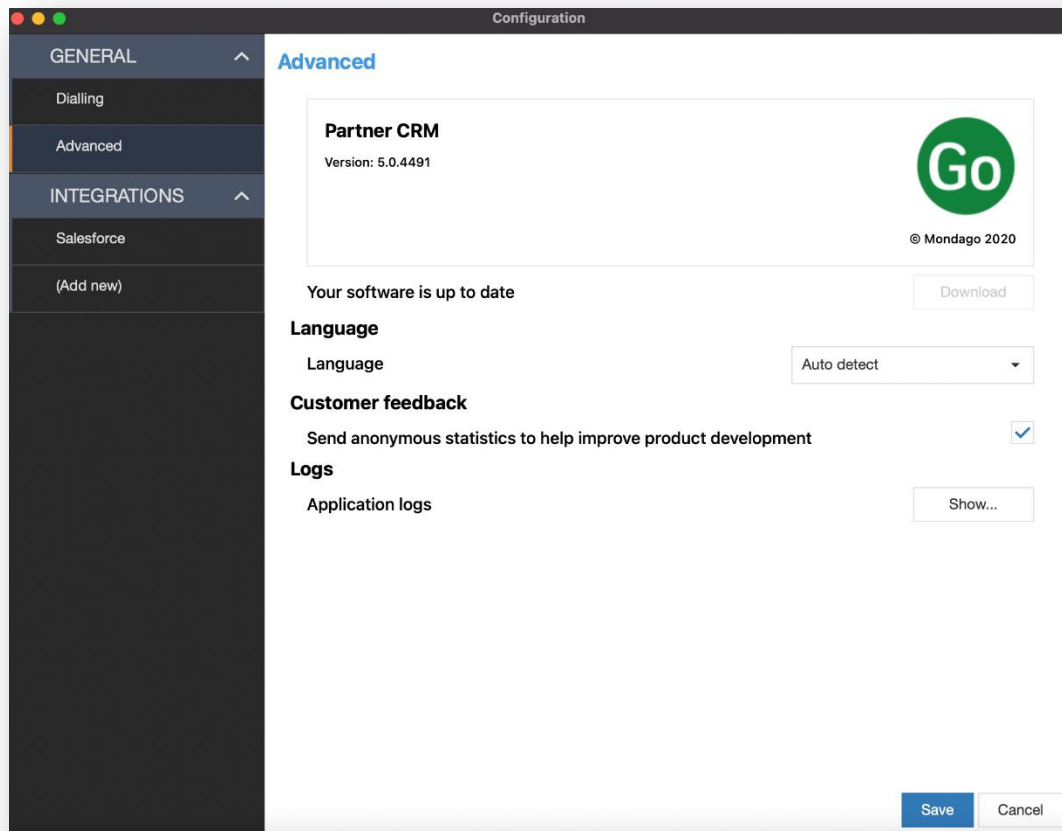


The extension can be disabled by selecting it (red):



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