

Installation

Introduction

The Unite for Teams software is supplied as an Internet download. It is a self-contained installer that contains the files needed to install a copy of Unite for Teams.

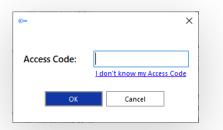
Before you start

Before you start, please check you have the following:

- A suitable computer for installation of the client software (please check minimum requirements)
- A valid Access Code and user login credentials for Unite for Teams supplied by your Service Provider

Access Code

After completing the software installation process and depending upon the software configuration, Unite for Teams may present the Access Code input window on first launch. A valid access code, supplied by your service provider, is required to proceed to user login. The Access Code is only required on first launch of the Unite for Teams client and may have been entered during installation, in which case this window will not appear and user Login will display.



A shortcut is also placed in the Windows Start Menu program list to return to this step, if required.



Mass Deployment

Unite for Teams can be installed to the user desktop by silent mode using the command format: IntegratorInstaller-4.2.0.2050.exe /quiet

After silent installation, the Setup Access Code shortcut is created but Unite for Teams will not automatically start up.



Welcome and Login

At the User login window, enter a valid username and password, as supplied by your service provider and click the "Log in" button:

Øite^{ti}	
Press "Log in" button to continue	
Log in Cancel Advanced 4.3.2.644	10

Select "Advanced" for more connection options

	Log in	Cancel	Advanced	
Access Code:				Reset
Options:	🕑 Use proxy			
				4.3.1.6004

Advanced Options

Access Code Reset

To modify the Access Code, click "Reset" and enter the new Access Code.

Access Code:	Reset

NOTE: this should only be performed on the guidance of your service provider.

Options

Select "Use proxy" only if required and instructed to by your service provider:

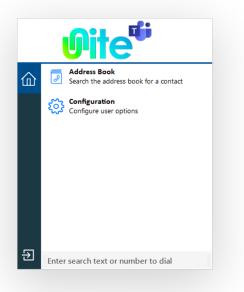
Options:	🔽 Use proxy	
		4.3.1.6004



Tray menu

Unite for Teams runs as a system tray program, displayed as a purple swirl.

To open the Tray menu to access tools and settings, right-click the Unite for Teams icon in the system tray.



Icon Definitions:

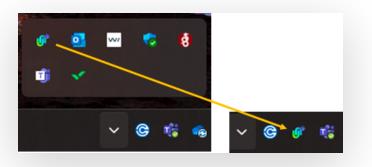


Home: Return to main Tray mode menu



Exit: Log out or Exit Unite for Teams

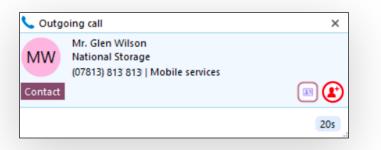
To keep the Unite for Teams tray icon visible, drag and drop the icon to the taskbar:





Preview window

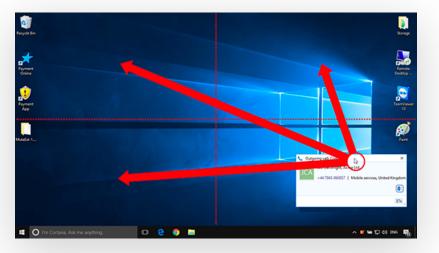
The Preview window presents an unobtrusive pop-up notification and information summary when a call is made or received. It also offers actions such as open contact data or write to activity log, depending on user and integration configuration:



The Preview window is hidden after 10 seconds by default (this can be changed in Configuration > Interface). Hover the mouse over the Unite for Teams status indicator icon to display the Preview window again.

Positioning

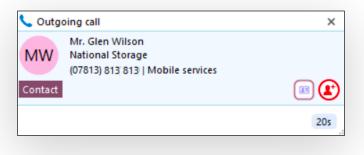
The preview window can be re-positioned to snap to any quarter of the screen. Drag the preview window by the header and drop into the desired quadrant:



*Note: The preview window will snap to a fixed position in one quarter of the screen.

Preview information

The Preview window can display contact name, company name, telephone number and location (if available) along with additional notes, all retrieved from any integrated address book or business CRM integration.



The Preview window provides both call control action buttons as well as contact or CRM integration action buttons.



Actions

The following actions and controls are available from the Preview window when a call is in progress, depending on the address book or business CRM integrations available:

Add Contact	Add the caller to an integrated CRM business application
Open/Pop Contact	Open the full contact details within an integrated CRM business application. The icon shown will relate to the CRM application (e.g. Google, Salesforce).
Create and Show Call Task	Creates and opens a call activity (call log) in an integrated CRM business application. The icon shown will relate to the CRM application (e.g. Salesforce, Dynamics) and also the type of entry: Contact, Account or Lead.

Note: The hold button is not utilized for transferring calls.

Add Contact (

When the call Preview Window displays a call that is not yet found in any integrated address book (or is found in some but not all integrated address books) the Add Contact icon is displayed. This offers a quick method to insert the contact details into multiple locations.

Entry not found in any address book:

Entry found in all address books except Salesforce:

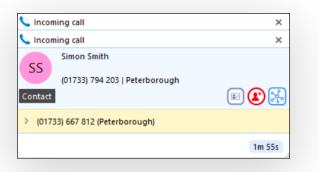
よ Add contact		×	L* Add contact	×
Phone number	07825112378		Phone number	01733667811
Туре	Google Contacts: Contact	~	Туре	Salesforce: Contact 🛛 🗸
Name	Google Contacts: Contact		Name	Salesforce: Contact Salesforce: Account Salesforce: Lead
Company			Company	CompanyA
Number type	Home	~	Number type	Business Phone \vee
E-mail			E-mail	bob.jones@companya.com
Notes			Notes	great customer!
S	ave Save and Show Ca	ancel		Save Save and edit Cancel

Select which integrated address book "Type" to add the contact into and either "Save" or "Save and Edit" to also open the contact within the selected address book. The stored details are then used to add to the next selected address book "Type" to quickly duplicate the contact record into multiple locations.



Multiple calls

When multiple parties or calls are in progress, the Preview window will "stack" each call with the currently active call initially at the front:

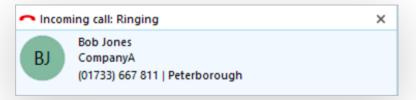


Clicking on the window header will bring an inactive Preview window to the front and into view.

Note: Selecting another Preview window does not affect the connected call status.

Close Window

Select "x" to close the preview window:



Note: Closing the preview window does not end the call

Address book search

Enter a contact name, company name or telephone number to search for, then click "Go".

Tray Mode Address Book Search

Address Book		-	- 0	×
Search: john				
		New contact 💌	Go	
dvanced search				*
Salesforce				
MB Mr. John Bond, Grand Hotels & Resorts Ltd	(312) 596-1000 (312) 596-1500 (312) 596-1563	Contact	000	Show Contact (Salesford
Mr. John Smith, Best Supplier	+44112233445566	Contact		- Show Contact (Salestore

Matching entries are displayed from any integrated CRM business application or the Telephone system User list.

Hovering over the displayed results will present a slide out menu offering click to dial, or click to "Show Contact" (in Edit mode, if authorized).



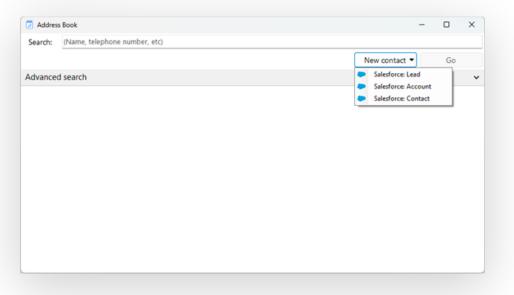
Advanced Search

Select the Advanced search option to use more specific filters or search on alternative contact details such as contact notes or address details, if supported by the source address book:

Advanced	d search	^
What:	(Type, Notes)	
Where:	(Street, Address, Town)	
Source:	(All)	~
	(All) Microsoft Outlook Salesforce Google Contacts	

New Contact

Select "New contact" to add a new entry to CRM Integration:



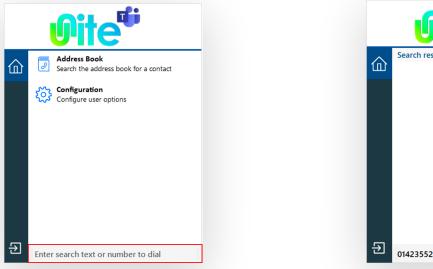
Fill in the contact details and select "Save":

L* Add contact		\times
Phone number		
Туре	Salesforce: Contact	\sim
Name		
Company		
Number type	Business Phone	\sim
E-mail		
Notes		
	Save Save and edit Cancel	



Dial / Search

At any time other than searching Help, the Tray menu "Search" bar can be used to Dial any number or search for a contact name within any integrated address book.



Dialing

To make a call, simply type the number to dial and hit Enter:



In Microsoft Teams the following prompt will appear. Click Call



Contact Searching

Contacts can be found by entering characters from the contact name (first, middle, last etc.), company or telephone number.

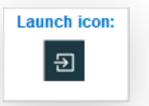
Any matching contact will be displayed – simply click the number to dial, or hover over the contact and use the slide out toolbar to open the contact within the integrated CRM application.

Hovering over a User entry will open the slide out toolbar offering the option to call or open the contact.

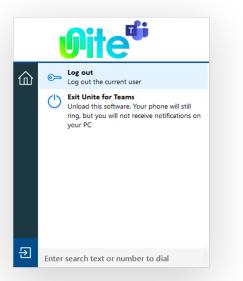




Exit / Session



Use the Exit / Session button to log in as a different user or Exit and close Unite for Teams.



Search and Call for Microsoft Teams Organization Level Install

This method requires administrator level access, and uses a PowerShell script to install Search and Call within the Teams App Store across the organization. Users can then download Search and Call when they click on Apps.

What does the PowerShell Script do

The PowerShell scripts contains 3 commands, or cmdlet's, that do the following:

1. Connect-MicrosoftTeams – this cmdlet will ask the user to sign in using their Microsoft Teams credentials via the standard Microsoft Teams login process. The credentials used must belong to someone who has administrator level access to the Microsoft Teams environment for the organization.

2. New-TeamsApp -DistributionMethod organization -Path

C:\Temp\GoIntegratorSearchandCall-1.0.23.zip – this cmdlet will install the Search and Call app in the Teams App Store for the organization. Change the file location for the -Path parameter to be the path where you saved the zip file.

3. Disconnect-MicrosoftTeams – this cmdlet disconnects the user from the Microsoft Teams environment.





Apps		
Search all apps	Q	Built for your org
Home	>	Integrator
Built for your org		Search and Call is an application that can be
Featured		added to Microsoft Teams. It connects to Go Integrator and enables users access to key Go Integrator features from within Microsoft Teams.
Popular on Teams		
Top picks		

How to use the PowerShell script

- 1. Download the PowerShell script from here: Download
- 2. Download the Search and Call for Microsoft Teams file: Download
- 3. Save the provided zip file at a suitable file location that will be accessible from the PowerShell environment.
- 4. Save the provided PowerShell file at the same location. Ensure that the path has been changed to the correct path to the zip file
- 5. Open Windows PowerShell in Administrator mode.
- 6. Change File Location to the directory containing the PowerShell script
- 7. Type in the first few letters of the script filename and press tab. This should populate the full name of the script in PowerShell.
- 8. Press Return
- 9. The script will then run, presenting the user with a login screen for Microsoft Teams
- 10. Once logged in, the script will create the App in the tenant app store under a heading on Built for your org

User Instructions following PowerShell Script

- 1. Click on "Apps" at the bottom of the Microsoft Teams Menu
- 2. Search and Call for Microsoft Teams will be displayed under "Built for your org"
- 3. Click on Search and Call for Microsoft Teams, which will display a new screen
- 4. Click "Add". Search and Call for Microsoft Teams will now install

	Pinning to App Bar in Microsoft Teams Search and Call for Microsoft Teams may not immediately appear on the App Bar
Apps	 1. To pin the app, click on the 3 dots which will bring up a sub menu 2. Right click on Search and Call, and click "Pin"
? Help	Calls Recent Pop out app Pop out app Pin Calls Pop out app Pop out app
Help モ ク 💶 🤨	To uninstall Search and Call for Microsoft Teams right click on the Integrator pin and click uninstall



Using Search and Call for Microsoft Teams

Unite for Teams client should be installed and running for Search and Call for Microsoft Teams to work.

Searching for Contacts

 To access Search and Call for Microsoft Teams, click on the Pin labeled 'Integrator' on the App Bar.

6	Integrator	Search	About	
lee				Search

- A user can search for a contact using a contact name, company name or telephone number. This is done by typing one of these either fully or partially in the search for contacts field and pressing search.
- Results will be displayed from any connected CRM and internal directories.

6 Integrator Search About		ØC
lee	Search	•
 Microsoft Outlook 		
LH Lee Harrison, Faster Bikes	07813 1234567 C	ontact
▲ Salesforce		
LP Lee Peters, National Storage	03336789000 C	ontact 📧
▲ Users		
LM Lee Mansell	2245	

Display Contact

• By clicking on the icon to the right of the displayed contact name, a user can pop the contact record from their CRM.

lee Search	6 Integrator Search About		ØC
	lee	Search	•
LH Lee Harrison, Faster Bikes 07813 1234567 Contact	 Microsoft Outlook 		
	LH Lee Harrison, Faster Bikes	07813 1234567 Contact	



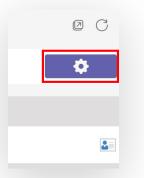
Making a call

• To make a call, click on the phone number from the search results. This will initiate a call within Microsoft Teams. The following prompt will appear - Click Call.

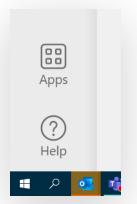
Would you like to call this nun	nber?	
+44 1423 552552		
	Cancel	Call

Access Unite for Teams Settings

• Clicking on the settings icon on the top right of the Teams display, will display the settings page from Unite for Teams.

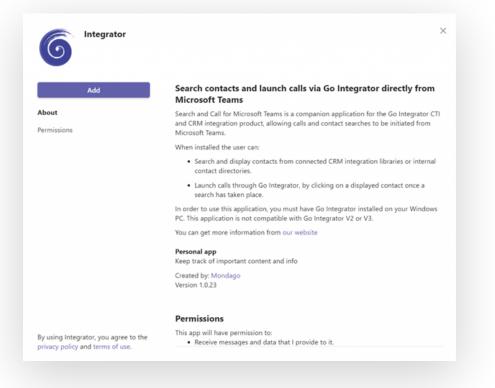


Search and Call for Microsoft Teams User Level Install



- 1. Download the Search and Call for Microsoft Teams file and store it locally: Download.
- 2. Click on "Apps" at the bottom of the Microsoft Teams Menu.
- 3. Click "Manage your apps" at the bottom.
- 4. Click "Upload a custom app", and then "Upload and Custom app". This displays a file menu where you can select Search and Call for Microsoft Teams from the location it was saved in. Click Open.

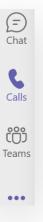




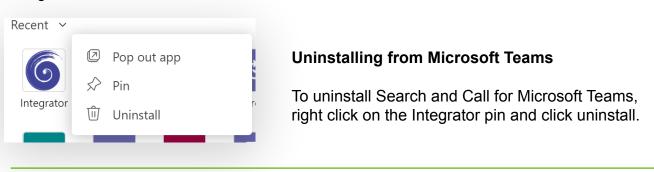
5. A new search will appear, click add.

Pinning to App Bar in Microsoft Teams

Search and Call for Microsoft Teams may not immediately appear on the App Bar 1. To pin the app, click on the 3 dots which will bring up a sub menu



2. Right click on Search and Call, and click "Pin"





Configuration

User defined settings are available within "Configuration" and are grouped into 2 areas: General and Integrations with support information available via the "About" section.

Note: The parameters available may also vary depending on centrally managed configuration settings.

🏟 Configuration		
≡ general	▲ Interface	
Interface	Preview window	_
Dialling	Show preview for call notifications	
API	Connected hide delay	10 secs \vee
σ^{o} integrations	Always on top	
-	Actions	
Salesforce	Show Contact in Edit Mode (if available)	۲
(Add new)	Hot keys	
? ABOUT	Make call	(none) \lor
Log	Make Call	(indite)
Versions	Application load	
	Start automatically with Windows	
	Localization	
	Language	Auto detect \sim
		Save Cancel

Configuration > Dialing

Manage outbound calling methods:

ialling		
Dialing methods		
5		
Clipboard dialling		
Focus dialling		
Application dialling		
ScreenRead dialling		
Applications to use dialling from:	:	
Application	Form	Text box
Add Edit	Remove	
Add Edit Dialling helpers	Remove	
	Remove	Download •
Dialling helpers	Remove	Download • • Disable
Dialling helpers Browser extension	Remove	

Dialing

Select the preferred method(s) for making outbound calls:

pboard dialling cus dialling		
plication dialling		
reenRead dialling		
plications to use dialling	from:	
Application	Form	Text box

Note: Different dialing methods are offered for varying application types. Not all applications will support all dialing types.

Clipboard Dialing

Enables quick dialing by selecting telephone numbers and copying, either by key sequence or mouse click:

Contacts.txt - Notepad File Edit Format View	Help Contact	PHONE		×
GREYBURG INC. Jarlson Ltd. Hammonds LLC	JOSH THOMPSON Sierra Reynolds Katie Jones	800-555-1234 800-555-1212 800-555-4321	Сору	₽

After the number is copied to the clipboard, a dial prompt notification appears in the corner of the screen.

🖑 Composing	×
Number to dial:	
800551234	
S	

Click the call button to initiate the outgoing call:

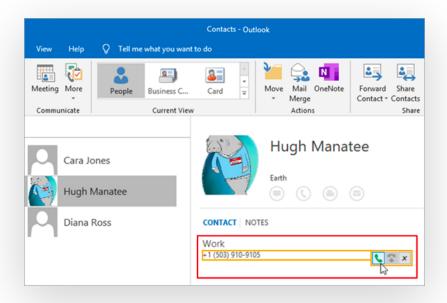
 \odot

The pop-up prompt appears in the same location as the Preview Window – drag to a different corner to change where the notification appears



Focus Dialing

Presents a dial icon within compatible applications for any field in focus containing a telephone number:



Click the dial icon to initiate the outgoing call:

۲.

Note: The field must first be selected or in "focus" for the dial icon to appear and the telephone number must be in a valid format

Application Dialing

Presents a dial icon within compatible applications by hovering the cursor over a valid telephone number.

ਜ਼ 5 ਟੇ ↑	η =		П.	unh Mana	tan End	h - Contact
	ΨŤ			ugn iviana	itee - Edit	n - Contact
File Contact	Insert Format	Text Review	Help	Ş		
Save & Delete Close	Gene	Certificates	Email	Meeting	More	Address Book
Actions		Show	Co	ommunicat	te	
Full Name	Hugh Manatee			(* 1)		
Company	Earth					
Job title				- Co		
File as	Manatee, Hugh		, ∖			
Internet						
Email 💌						
Display as						
Web page address						
IM address						
Phone numbers						
Business 🔻	+1 (503) 910-9105	2			٦	x

Click the dial icon to initiate the outgoing call:

٢.

Note: Application dialing requires configuration using the Application Dialing Wizard, as follows.

Select "Add" to open the Application Dialing Wizard:



Application	n	Form	Text box

With the desired application open, drag the target to the appropriate field:

Application Dialing Wizard	×					
A detection process is used to learn the application:						
1) Click on the target icon below						
2) Drag the target icon to the textbox that contains the telephone number						
3) Release the mouse button when the target is above the telephone number						
4) Edit the values below to best suit the application						
Detect: (Drag the target icon to the textbox that contains the telephone number)						
Application:						
Form:						
Text box:						
Exclude						
Next Cancel						

With the target on the telephone number field, the application details and green check will appear:

Application Dia	ling Wizard	×	⊟ 5 ∂ ↑	4 ÷		
A detection pro	cess is used to learn the application:		File Contact	Insert F	ormat Text Review	Help 🛇
1) Click on the t	target icon below		🗩 💊 🗞 Sav	ve & New 👻	Details	
2) Drag the targ	get icon to the textbox that contains the telephone number		For		Certificates	
3) Release the r	nouse button when the target is above the telephone number		Save & Delete Close	eNote	General All Fields	Email Meeting
4) Edit the value	es below to best suit the application		Actions		Show	Communicate
Detect:	 (Drag the target icon to the textbox that contains the telephone number) 		Full Name Company	Hugh Mana Earth	tee	
Application:	OUTLOOK.EXE		Job title			
Form:	Hugh Manatee - Earth - Contact] [File as	Manatee, H	ugh	▼
Text box:	RichEdit20WPT	j	Internet			
	Exclude	-	Display as Web page didress			
	Next Cancel		IM address Phone numbers			
			Business 🔻	+1 (503) 910	0.9105	



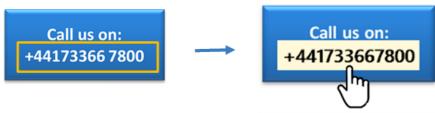
Application Dia	ling Wizard	×
A detection pro	cess is used to learn the application:	
1) Click on the f	target icon below	
2) Drag the targ	get icon to the textbox that contains the telephone number	
3) Release the r	nouse button when the target is above the telephone number	
4) Edit the value	es below to best suit the application	
Detect:	 (Drag the target icon to the textbox that contains the telephone number) 	
Application:	OUTLOOK.EXE	
Form:	Hugh Manatee - Earth - Contact	
Text box:	RichEdit20WPT	
	Exclude	
	Next Cancel	

Applications configured using the dialing wizard are displayed in the dialing menu:

JTLOOK.EXE Hugh Manatee - Earth RichEdit20WPT
TLOOKILAL TIUgit Manatee - Lattit Kicillutt2044F1

ScreenRead dialing

Enables any valid telephone number, detected through image analysis, to be dialed:



Move the mouse cursor over the telephone number you wish to dial and hold CTRL-SHIFT. The orange detection box appears and attempts to detect a valid telephone number. If the number is successfully detected, the telephone number will be converted to a Click-to-dial field – just click to initiate the outgoing call.

Note: Telephone numbers are not always detectable within images due to font style, alignment or image clarity.





Dialing Helpers

Select a Browser extension or enable traditional telephony dialing interfaces:

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

Browser Extension

Web dialing enables Click to Dial of detected telephone numbers directly from a web browser:

()					(Q Search.
Sales Console	Contacts	~	E9)	Iohn Smith Co	intact v ×	
🖽 John Smith 🗟	NULLING AND			Activity	Chatter	Details
+ Follow New Case	New Note			Contact Owr	ner 😸 A	lanE Monda
Phone (2) ▼ ≰01423552552 ♪	Would you like +44 1423 552552	to call	this	number?		
					Cancel	Call

Select a web browser extension to install from the drop-down list:

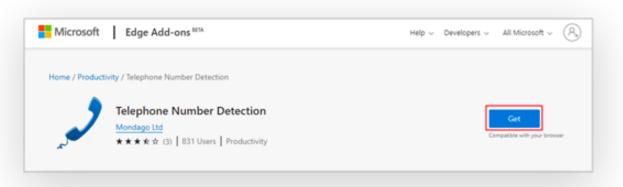
Dialling helpers		
Browser extension	Download	•
	C Edge	
	Opera	
	📀 Chrome	
	Firefox	



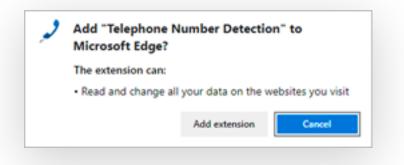
Edge

Select Edge from the list of Dialing helpers in the configuration. The default Windows browser will open from this action. It is recommended to set Edge as the default Windows browser.

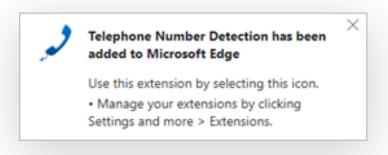
Select "Get":



Select "Add extension"



A confirmation will appear:



The extension is enabled by default (green):



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





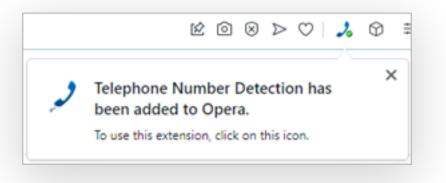
Opera

Select Opera from the list of Dialing helpers in the configuration. The default Windows browser will open from this action. It is recommended to set Opera as the default Windows browser.

Select "Add to Opera":

Opera addons	Extensions	Wallpapers	Develop		SIGN IN
Home > Extensions > Productivity > Tel by cE-telephone Number by cE-telephony ★ 0.0 / 5 Your	-			Search for add-ons + Add to Opera	Q,
Total number of ratings: 0					

A confirmation will appear:



The extension is enabled by default (green):



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



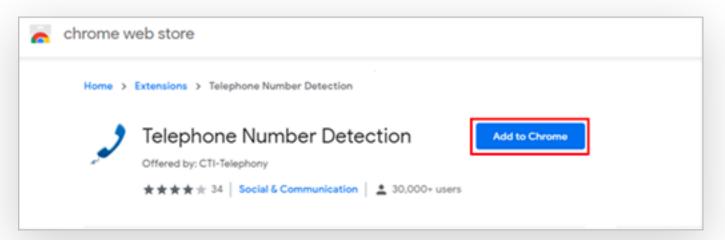




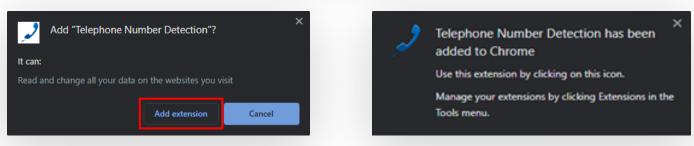
Chrome

Select Chrome from the list of Dialing helpers in the configuration. The default Windows browser will open from this action. It is recommended to set Chrome as the default Windows browser.

Select "Add to Chrome":

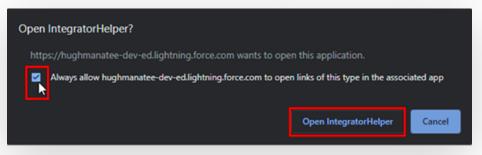


Select "Add extension":



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

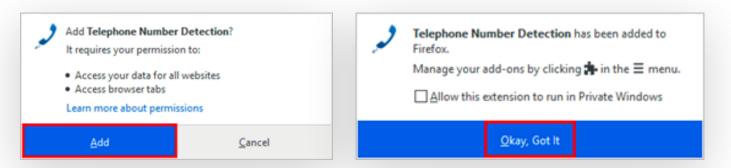
Select Firefox from the list of Dialing helpers in the configuration. The default Windows browser will open from this action. It is recommended to set Firefox as the default Windows browser.

Select "Add to Firefox":

) 7	irefox Browser ADD-ONS Explore <u>Extensions</u> Themes More_~
لو)
	ephone Number Detection TI-Telephony
	tically convert phone numbers into clickable links, compatible with many
	ry applications.

Select "Add":





The extension is enabled by default (green):



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



Traditional Telephony Drivers

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

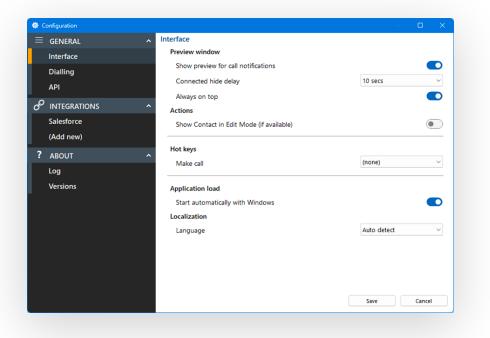
Note: Refer to the manual of your TAPI-enabled application to configure dialing.





Configuration > Interface

The most common user-defined parameters are within the "Interface" settings.



Preview window

Controls the behavior of the Preview Window.

Preview window		
Show preview for call notifications		
Connected hide delay	10 secs	~
Always on top		

By default, the Preview Window is used to present incoming and outgoing call information and controls.

The main Preview Window is designed to be as unobtrusive as possible, so will automatically hide once a call is answered and in progress. Hovering over the Tray icon will bring the Preview Window back into view during a call.

The default hide delay is 10 seconds but can be increased or disabled (set to "infinite") to keep the Preview window permanently in view for the duratio

Infinite	
5 secs	
10 secs	
15 secs	
20 secs	
25 secs	
30 secs	
35 secs	
40 secs	
45 secs	
50 secs	
55 secs	
60 secs	

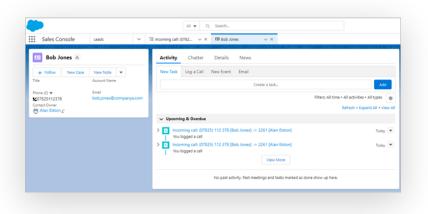
The Preview Window will display in front of other windows but without taking focus from the current application in use. When "Always on top" is enabled the Preview Window will remain in view whilst continuing to work on the current application.

Actions

Depending on the address book location, matching contacts are displayed in "standard" mode if opened by clicking the contact icon. With "Show Contact in Edit Mode" enabled, the contact is opened in "edit" mode, if available.

Actions
Show Contact in Edit Mode (if available)

Example-Contact open in Salesforce "standard" mode:



Example-Contact open in Salesforce "edit" mode:

		Edit Bo	ob Jones		
Contact Owner	🖰 Alan Eiston		Phone	07825112378	
•Name	Salutation		Home Phone		
	None	Ŧ			
	First Name				
	Bob				
	*Last Name				
	Jones				
Account Name	Search Accounts	Q	Mobile		
Title			Other Phone		
Department			Fax		
Birthdate		8	Email	bob.jones@compi	inya.com
Reports To	Search Contacts	Q	Assistant		
Lead Source	None	٠	Asst. Phone		
Mailing Address Mailing Street			Other Address Other Street		
maning some			COLE STREET		
Mailing City		Mailing State/Province	Other City		Other State/Province
Mailing Zip/Postal Co	de	Mailing Country	Other Zip/Postal Code		Other Country
		Cancel Sa	we & New Save		

Example-Call Activity log open in Salesforce "standard" mode:

Sales Console	Leads	~	fill Incoming call: (0782 🗸 ×	TE Incoming call: (0782	\vee ×		
Task	7. NYANY 7. 1997 - 7.99	5-11(- Z	CONTRACT AND A NEW YORK	7 - 1138-114 - 7447	ets III î l	7 N.W.W. 78677	JENS-THE FILL-SAUGUE NORMAL
Incoming ca	ll: (07825) 112 378 [Bob Jon	es] -> 2261 [Alan Elston]				 Completed
ine F	lelated To						
ob Jones							
Second MZ	2011/2011 I N		-3/11 N 12 N 12 S	NELS - SHI	()) ;	<11/2011	
Details Relat	ed						
Assigned To	Alan Elston					Status	Completed
Subject	Incoming call: (078	825) 112 37	8 (Bob Jones) -> 2261 (Alan Eisto	n]		Name	Bob Jones
Due Date	20/01/2022					Related To	
Priority	Normal						
Created By	Alan Elston, 20	0/01/2022, 1	13:59			Last Modified By	Han Elston, 20/01/2022, 13:59
Comments	Direction: Incomin Caller: (07825) 112	378 [Bob J	iones]				
Comments	Called: 2261 [Alan	Elston] 13:14:56					



Example-Call activity open in Salesforce "edit" mode:

 Assigned To 	🛃 Alan Elston 🛛 🕹	• Status	Completed	•
• Subject	Incoming call: (07825) 112 378 (Bob Jone Q	Name	Bob Jones	×
Due Date	20/01/2022	Related To	🔽 👻 Search Accounts	Q,
• Priority	Normal			
Created By	Alan Elston. 20/01/2022, 14:00	Last Modified By	Alan Elston, 20/01/2022, 14:00	
Comments	Direction: Incoming Caller: (07825) 112 378 [Bob Jones] Caller: 2261 [dan Elston]			-

Hot Keys

Assign keystroke combinations to Make call:

Hot keys		
Make call	Ctrl+2	\sim

Note: All hotkey combinations require CTRL, SHIFT or CTRL+SHIFT to be included

Application load

Enable automatic start up with Windows:

Application load	
Start automatically with Windows	

Localization

Set language and formatting options to the appropriate locale:

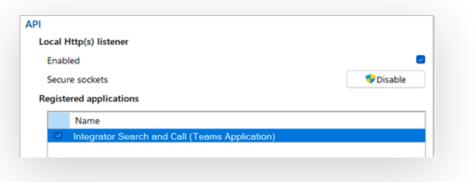
Localization	
Language	Auto detect 🛛 🗸
	Auto detect
	English (UK)
	English (US)
	French
	German
	Dutch
	Russian
	Italian
	Portuguese
	Spanish

Note: By default, the software automatically selects the localization of the PC.



Configuration > API

Local Http(s) listener(s) for API connections from other software applications, enabled by default.



Toggle "Secure sockets" as enabled or disabled.

Registered applications appear below:

Name	
Mondi Test Connection	

Configuration > Integrations

Integrations connect a CRM or application with the Telephone system. Incoming or outgoing telephone numbers are matched to any contact records in a CRM to present contact information including contact name, company or account name and additional notes.

Users can integrate with a large list of various business CRM applications and address books.

The integration provides address book searching, incoming call preview information, manual and automatic contact popping and in many cases, activity logging.

Setup CRM Integration

Select "(Add new)" to integrate with a business CRM application or address book.

New v4 integrations are marked with a star icon and may include additional features such as the option to "Add Contact" information directly into the address book from the Preview Window.

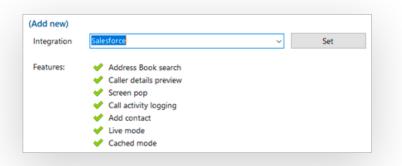


Configuration				– o ×
GENERAL	 (Add new) 			
Interface	Integration	(Please select)	~	Set
Dialling		Autotask	* .)	
Dialling		😵 Bigin	*	
API		24 Bitrix24	*	
0		Carerix	*	
	^	Liniko	*	
Google Contacts		Clio	*	
		Cloud Contacts	*	
Salesforce		Connectivise Manage Directory		
(Add new)		 Efficy 		
(Aud new)		B EGroupware	🚑	
? ABOUT	~	Exact Online		
		Freshdesk	🔒 🗌	
Log		Google Contacts	÷ 🔒	
Versions		O Halo	÷ 1	
Veral on a		3 HubSpot	*	
		R Keap Max Classic	*	
		Maximizer CRM	*	
		M MicroHIS	*	
		Microsoft Access	*	
		Microsoft Dynamics 365 CRM	*	
		Microsoft Outlook	*	
		S Microsoft Outlook on the web	*	
		N NetSuite	*	
		O Odoo	*	Cancel
		Pipedrive	*	

Note: Only "Standard" integrations are displayed in the list.

Other applications or "Controlled" integrations require an unlock code. Please contact support for assistance.

Choose the desired application from the list and select "Set" to view the Features that the selected integration can support (example shown for Salesforce CRM):



Click "Save" to continue to the setup screen for the selected integration. The configuration form varies with the selected integration (example shown for Salesforce CRM):

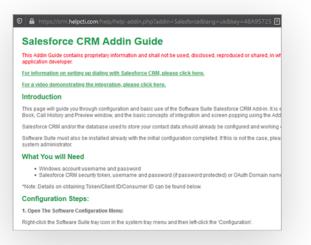
Name		Sale	sforce	
Enabled				Disable
Salesforce				
Client id				
Endpoint	https://log	in.salesforce.com	/services/oauth2/	
				Authorise
				Not authorized
				Get objects
Objects	Contac Leads			
Caching				
Cache				
Cache frequency, minutes				60 🗘
Status:				
Activities				
Pop automatically on inbound				Never ~
Create activity on call end				
Show activities on call				
Integration test				
Check connection				Check
Test search				Test
				 Cancel





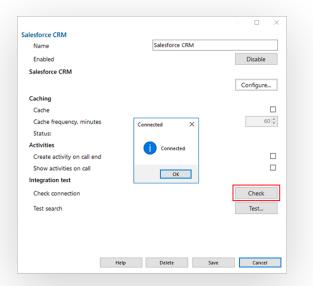
Help

Detailed step-by-step guidance is provided online for each "Standard" integration - click "Help" to open the Integration guide (example shown for Salesforce CRM):



Check

After completing the integration setup, check the connection status of the integration to confirm a connection can be made:



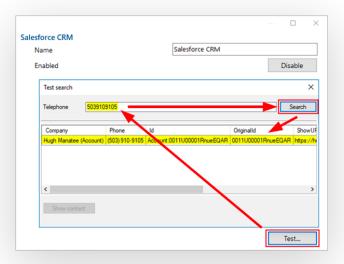
Test

Test search by selecting "Test", enter the contact number, then select Search:

Note: Test search may be unavailable with certain CRMs or applications.

After completing the configuration, select "Save" to finalize the integration.

Select "Disable" to temporarily disable the integration. Select "Delete" to completely remove the integration, if required.





Options

Additional options are available, depending on the specific integration selected:

Caching

If the application allows it, the contact database can be downloaded and cached to accelerate contact searches for matching telephone numbers.

The frequency of downloading the data can be configured between 1 - 100 minutes.

Caching	
Cache	
Cache frequency, minutes	60 🗘
Status:	Last cache: 21/10/2021 17:17:36 (total records: 2)

The Status shows when the last download occurred and how many records were downloaded.

Activities

Additional actions can be applied to the integration.

Activities	
Pop automatically on inbound	Ringing ~
Create activity on call end	
Show activities on call	

Automatic Popping

Any integration can individually be configured to automatically pop matching contact entries on incoming calls, either during ringing (as soon as the call is presented) or when connected (after answering the call).

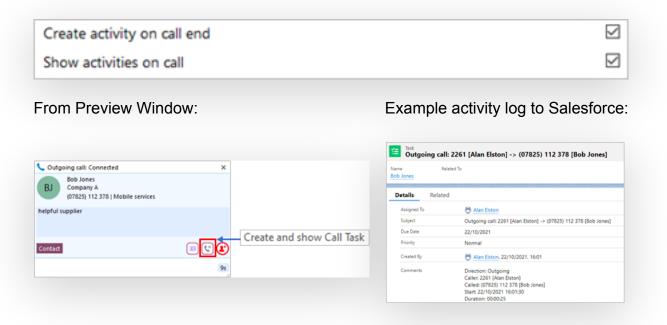
Pop automatically on inbound	Ringing ~
	Never
	Ringing
	Ringing Connected

Manual contact popping is still available to other integrations. For example, if only 1 out of 4 configured integrations is set to pop automatically, contacts found in any of the other 3 integrations can be manually opened using the associated icon.



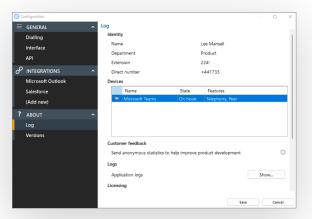
Call Activity Logging

For compatible integrations, call activity events can be written directly into the business CRM application transaction logs either manually by a button press, or automatically at the end of a call.



Configuration > Log

The Log section contains important details about the client, user and software configuration:



Identity

Displays current users Name, Department, Extension number and Direct Dial Number. Note: Depending on initial setup, not all user information will be displayed

Devices

Displays information about connected telephony devices:

Device	s			
	Name	State	Features	
	Microsoft Teams	On hook	Telephony, Peer	

Customer Feedback

Send data into the software development team to help improve the product evolution

Customer feedback	
Send anonymous statistics to help improve product development	E



Licensing

Displays the licensing detail and included features of both the Telephone system and Unite for Teams user profile

Logs

Select "Show" to open the application log file location for support escalations and issue resolution:

ogs Application logs			Show
→ · · ↑ 🚞 « AppData > Local > Temp > Integral	tor v C	2 Search Integrator	
→ · · · · · · · · · · · · · · · · · · ·	tor C C	2. Search Lategrator Type	Size
	-		Size 987 KB
□ Name	Date modified	Туре	
□ Name iogs_06122022_115230@PortaOne.data	Date modified 06/12/2022 14:26	Type DATA File	987 KB

Configuration > Versions

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

Configuration		- O >
🗏 GENERAL	Versions	
Interface	Unite for Teams	
Dialling	office for realits	6ite[®]
API	Version: 4.3.2.6440	
0		
	<u>^</u>	© CallTower
(Add new)		
? ABOUT	Your software is up to date	Download
Log		Version
Versions	Name Accessibility.dll	4.0.0.0
versions	Addin.Api.DLL	4.3.2.6440
	Addin.Api.Windows.DLL	4.3.2.6440
	R Addin.AudioConfiguration.DLL	4.3.2.6440
	R Addin.Avatar.DLL	4.3.2.6440
	Addin.Bluetooth.DLL	4.3.2.6440
	Addin.Blynclight.DLL	4.3.2.6440
	Addin.Busylight.DLL	4.3.2.6440
	Addin.CallSounds.DLL	4.3.2.6440
	Notices License agreement	1336110

Download

Download link if a later software version is available and update permissions are enabled

Notices

Detailed technical information of each component

License agreement

Full End User License agreement detail



