



# CommConnect

## Quick Start Guide

The purpose of this document is to provide the guidance on the steps needed to get the basic features of CommConnect enabled. Detailed instructions on all features can be found in the application's Help guide.

Technical Requirements	3
Supported Operating Systems	3
Citrix and Terminal Services	3
Minimum Hardware Requirements	3
Supported Internet Browsers	3
Help	4
Getting Started	5
Step 1: Download & Install CommConnect	5
Configuring CommConnect	5
Step 2: Telephony settings	5
Serial number (License Key)	5
Login Details	5
Step 3: Interface Settings	6
License type	6
Application load option	6
Preview window option	6
Step 4: Dialing Settings	7
Dialing methods	7
Browser Extensions for Dialing	8
TAPI Dialers	8
Step 5: Call Events	9
Default actions	9
CRM Integration Setup	10
CRM Integration Setup Example - Outlook	11
Step 1: Choosing the CRM	11
Step 2: Connecting to the CRM	11
Step 3: Selecting Call Activity Options	12
Step 4: Testing the CRM Connection	12
Step 5: Saving Integration	12
Addendum: Internet Browser Add-in - Web Dialing	13
Installing the Browser Extension/Add-in	13

Configuring the Extension/Add-in	14
Placing a Call	14
Using CommConnect	15
Tray Menu	15
Menu	15
Phone	15
Outbound Dialing	15
Actions	16
Address Book	16
Call History	17
Adding New Contacts	17

# Technical Requirements

## Supported Operating Systems

- Windows 10<sup>1</sup> (Desktop mode)

**Note:** .NET 4.5 Framework is supported

## Citrix and Terminal Services

Name	Windows Version
<b>Windows Terminal-App-V</b>	Win Server 2016 & 2019 Desktop Experience Edition <sup>1</sup> Win 10 (Desktop mode) <sup>1</sup>
<b>Windows Terminal-Remote Application</b>	Win Server 2016 & 2019 Desktop Experience Edition <sup>1</sup> Win 10 (Desktop mode) <sup>1</sup> RDP 6.1 or greater client, with Remote App Support
<b>Citrix-Application Virtualization</b>	Win Server 2106 & 2019 Desktop Experience Edition Win 10 (Desktop mode)
<b>Citrix-Session Virtualization/Standard Terminal Services</b>	Win Server 2106 & 2019 Desktop Experience Edition Win 10 (Desktop mode)

## Minimum Hardware Requirements

- 1.8 GHz Pentium-class processor
- 2GB Memory
- 1GB free hard drive space

## Supported Internet Browsers<sup>2</sup>

Browser	Supported Versions	Extension / Add-on
Internet Explorer (PC)	11 *	Telephone Number Detection 1.1.0
Microsoft Edge (PC)	44.X	Telephone Number Detection 1.2.2
Google Chrome (PC)	63.X	Telephone Number Detection 1.2.2
Mozilla Firefox (PC)	57.X	Telephone Number Detection 1.2.2
Opera (PC)	47	Telephone Number Detection 1.2.2

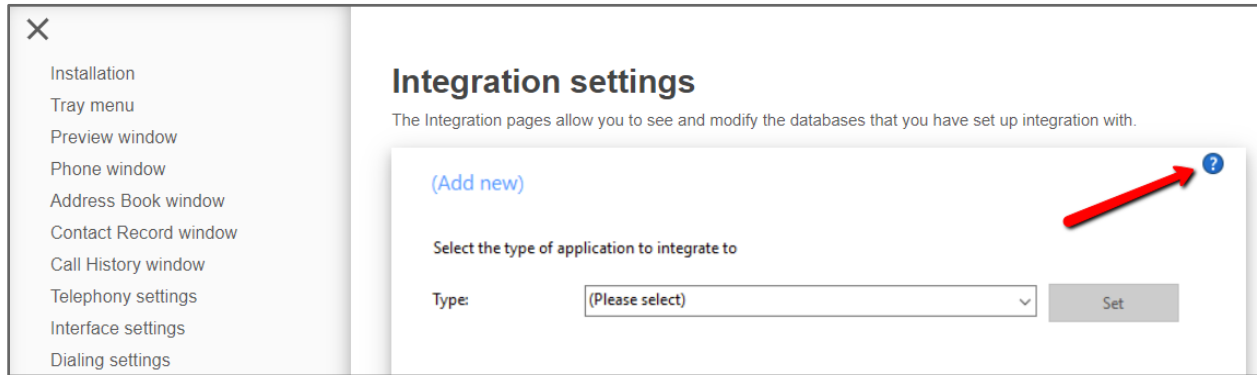
**Note:** Microsoft security patch MS14-080 stops web-page dialing working with IE11. Please contact the ESI Support if you are experiencing this issue.

<sup>1</sup> 32-bit and 64-bit variants supported unless stated otherwise

<sup>2</sup> For web dialing support

# Help

Information not described in this Quick Start Guide can be found in the application's online Help Guide. To access additional help information click Help in the Configuration window. Pay special attention to the blue help icon within a help page (shown in the picture below). Clicking this icon will take you to more specialized help such as how to setup a specific CRM integration.



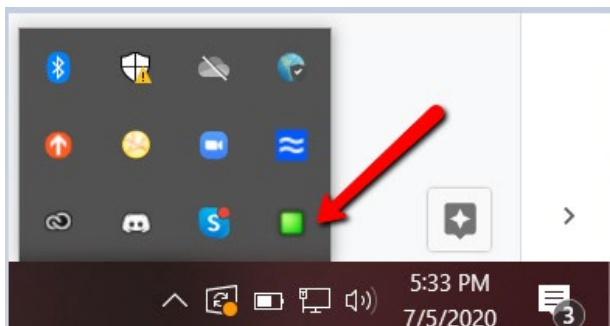
## Getting Started

Follow the steps on the next few pages to Install and Configure CommConnect.

### *Step 1: Download & Install CommConnect*

To download and install CommConnect to your PC click on the installer link provided to you by ESI. CommConnect is a Windows-based program therefore it will need to be installed on each PC that plans to use the application.

To access the app after it's installed, right click on the box that appears in the system tray (in the lower right corner of the PC). The box icon will appear white or gray upon initial installation.



### **Configuring CommConnect**

The dialog box that appears when right clicking the app icon provides various fields, from entering the serial number (aka license key) to setting up call handling options.

The next steps will provide the basics for setting up key fields in CommConnect so the user can use the application.

### *Step 2: Telephony settings*

The Telephony page is where you'll enter the serial number (license) and login information.

#### **Serial number (License Key)**

The serial number field is where you'll enter the license key that was given to you by ESI. The same number is used for each user at the site. Once you've entered the number be sure to click **Set**. You will see a green check mark for a valid serial number.

Enter your serial number below (leave blank for a trial)

Serial number:

Clicking Release will release the license from you but make it available for another user.

#### **Login Details**

The login credentials are the same as those you enter for ESI's eCloud eConsole, ePhoneGO, or Webphone. These credentials are provided by ESI during implementation.

Username:

Password:

### Step 3: Interface Settings

The Interface page allows you to change settings relating to how the application performs on startup and those actions that happen when calls take place.

#### **License type**

Displays a license type the CommConnect Client uses.

License type: CRM

#### **Application load option**

Enable this option to have the software start automatically when you log on to your computer.

Application load:  Start automatically with Windows

#### **Preview window option**

Enable this feature to receive a notification on an incoming call.

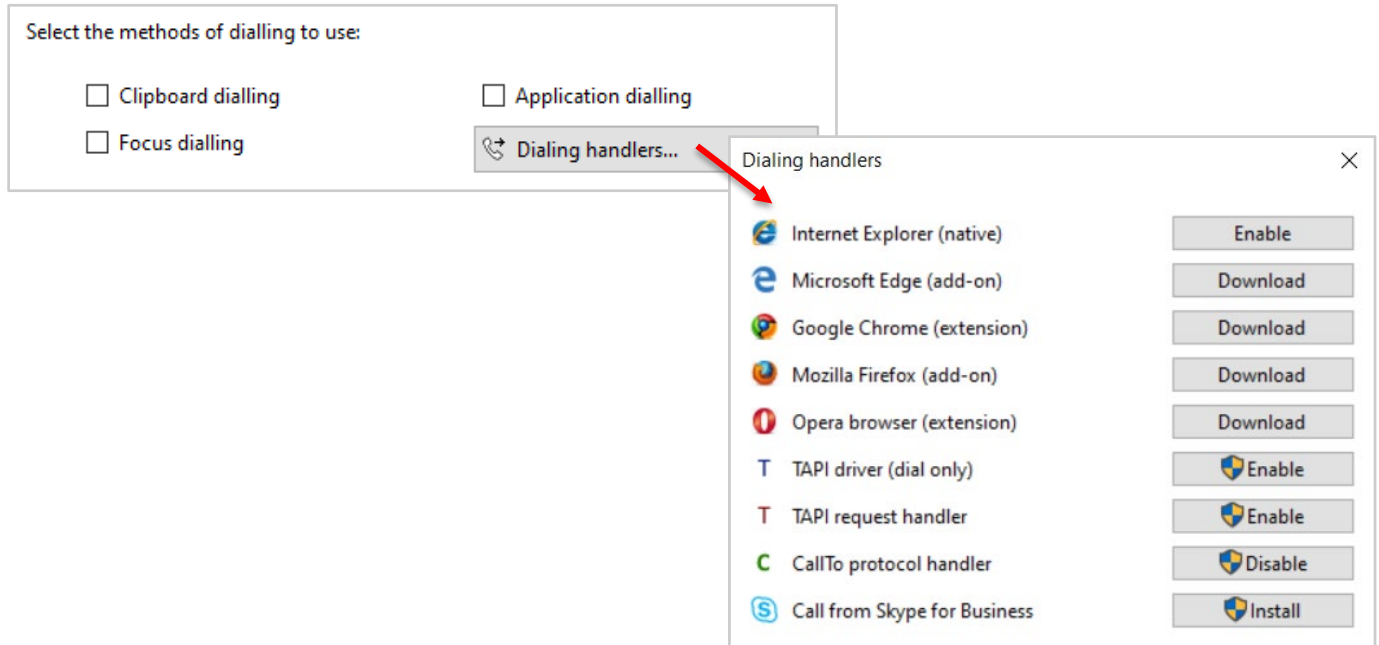
Preview window:  Show preview for call notification

## Step 4: Dialing Settings

These settings allow you to turn dialing on/off from different types of application that the software supports.

### Dialing methods

Check the appropriate boxes to turn the required dialing methods on.



Method	Description	Expected behavior	Typical use
Clipboard Dialing	When copying a valid phone number to clipboard.	Each time you copy a valid phone number a small bubble will appear that will ask you if you want to call that number.	Numbers within an email or a document.
App Dialing	Most CRM apps store phone numbers in textboxes. App dialing can be trained to recognize these fields and place a dial button alongside them.	Once CommConnect has learned your app, you will see one of two options. Either a dial button appears on the right hand side of a textbox, or you will have to hover with your mouse above that textbox in which case the Dial and Hang up buttons will appear also on the right hand side of the textbox.	Windows PC apps (e.g. Microsoft Outlook's Contacts).
Focus Dialing	Dynamically scans and recognizes any numbers in textboxes that look like phone numbers.	It will highlight any valid phone number within a textbox you have clicked on (based on the criteria you've set) and provide you with three options: Dial, Hung up and Dismiss buttons.	Windows-based apps.  Use only if the App dialing option is not appropriate.

**Note:** For more information on valid telephone numbers see Criteria section via CommConnect's Help button.

## **Browser Extensions for Dialing**

<b>Method</b>	<b>Description</b>	<b>Expected behavior</b>	<b>Typical use</b>
Internet Explorer (native)	To dial a phone number directly from Internet Explorer.	It turns valid phone numbers into dial-able hyperlinks.	If you use a web-based CRM or visiting websites with contact details that include a phone number that you want to dial.
Microsoft Edge (extension)	To dial a phone number directly from Edge.  <a href="#">For configuration details, click here.</a>	After enabling the extension, you will be able to control (via Edge Toolbar) whether or not you want the extension to turn valid phone numbers into dial-able hyperlinks.	If you use a web-based CRM or visiting websites with contact details that include phone numbers that you want to dial.
Google Chrome (extension)	To dial a phone number directly from Google Chrome.  <a href="#">For configuration details, click here.</a>	After installing and enabling the extension you will be able to control (via Chrome Toolbar) whether or not you want the extension to turn valid phone numbers into dial-able hyperlinks.	If you use a web-based CRM or visiting websites with contact details that include phone numbers that you want to dial.
Mozilla Firefox (add-on)	To dial a phone number directly from Mozilla Firefox.  <a href="#">For configuration details, click here.</a>	After enabling the add-on, you will be able to control whether or not you want the extension to turn valid phone numbers into dial-able hyperlinks.	If you use a web-based CRM or visiting websites with contact details that include phone numbers that you want to dial.

## **TAPI Dialers**

<b>Method</b>	<b>Description</b>	<b>Expected behavior</b>	<b>Typical use</b>
TAPI driver (dial only)	This option refers to any application that supports/allows TAPI dialing.	Once you have enabled TAPI and configured your CRM app, you will be able to dial out phone numbers directly from the CRM.	Provides a TAPI (dial only) driver to handle call requests from such CRMs to the telephone system. (i.e., Goldmine)
TAPI request handler	Certain types of TAPI applications don't specify a device to use. They simply hand-over the command to CommConnect Client to handle the TAPI request.	Once you have enabled TAPI, turned on this option and configured your CRM app, CommConnect Client will handle the TAPI requests and allow you to dial telephone numbers directly from your CRM app.	Will capture and handle the TAPI request sent by CommConnect. Used for certain CRMs like Sage Line 50).
CallTo protocol handler	CallTo is a protocol used for marking up telephone numbers.	By enabling this option CommConnect 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.	Supports CallTo protocol to handle call requests like with the Maximizer app.



## Step 5: Call Events

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

### **Default 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.

Select the action to take place when calls happen

On ringing:	No action	▼
On answer:	No action	▼
On outbound:	No action	▼

- No Action - nothing happens on an incoming call
- Show Phone Window – the phone window will appear
- Show Contact - if the caller ID number of the incoming call matches a contact to an integrated CRM the contact details view within the CRM will pop forward.
- Create Phone Activity – if supported in the CRM integration a call record is created within the CRM

## CRM Integration Setup

The Integration tab is where you will link your CRM to CommConnect to use features like features such as Caller preview, Contact popping and Address book searching.

To make a new integration follow these steps.

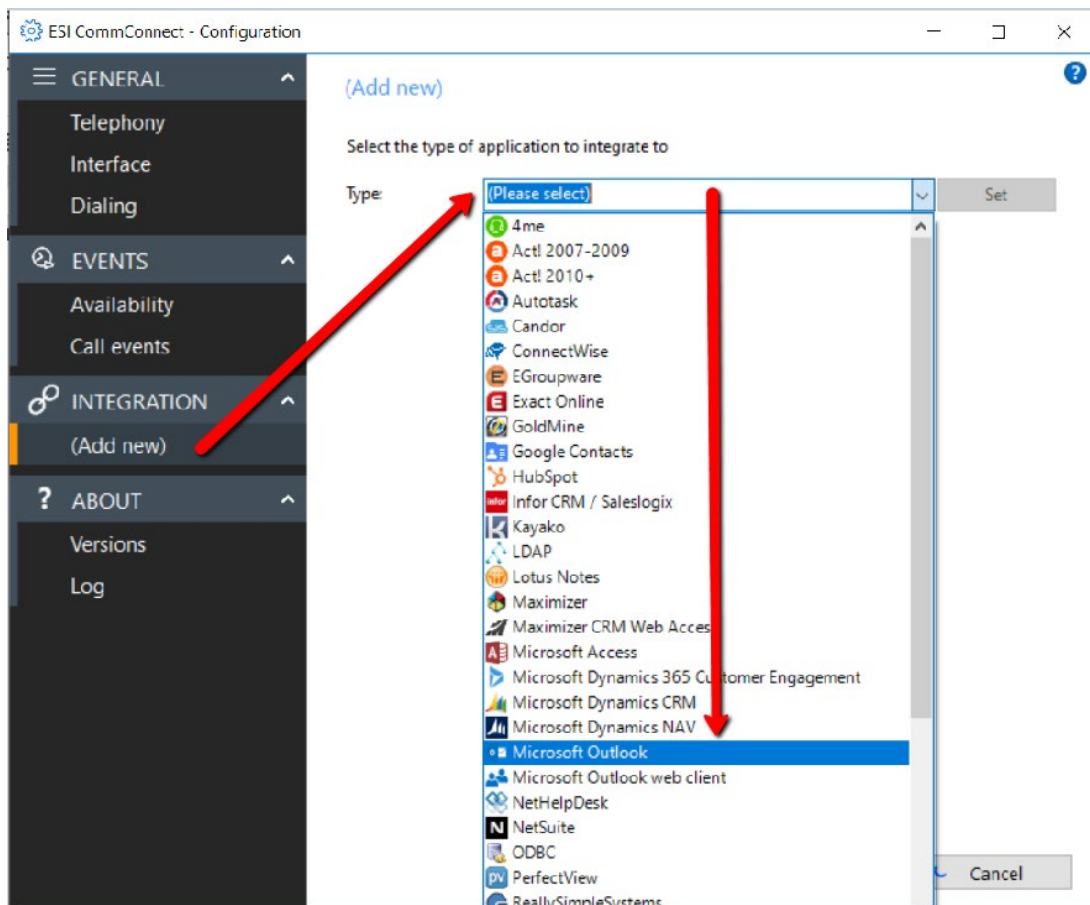
1. Click "Add new"
2. Select the type of database from the dropdown list.
  - The first time you enter this screen you may have to wait a few seconds as the software scans to find out what integrations are available.
  - Only Express and Standard integrations will appear in the list based on your serial number (aka license key).
  - For Controlled integrations you'll choose "Other applications" in the list and be asked to enter an Unlock Code which ESI would have provided you.
3. Once selected you'll see the screen update by asking for login or API information.
  - If these fields don't appear after a few seconds, click Save and go back to the Configuration settings where the CRM should now be listed under "Add-ins". You should also see the added fields to enter login or API information.
  - If you don't know or have access to the information requested in these fields, consult your system administrator. ESI does not have this information.
4. Choose the "Create Activity" or "Show Activity" checkboxes, if desired. These checkboxes will be grayed out if these features are not available with your chosen CRM.
5. ESI highly recommends performing the quick and simple the Test to ensure the integration is working.
6. Click Save.

## CRM Integration Setup Example - Outlook

This is example will use Outlook to show the steps involved in integrating with CommConnect. All integrations follow the same general steps, with the configuration section being specific to each CRM/ERP. For instructions on specific integrations click the blue help icon in the upper right corner of the integration screen once a specific integration (i.e., Outlook, Google, ConnectWise, etc.) is chosen.

### Step 1: Choosing the CRM

- Right click on the CommConnect icon in the system tray.
- Choose “Add new” under Integration in the left side menu.
- Choose Outlook from the drop down list.
- Click 'Set'.
  - Give the app a few seconds until the configuration and test fields appear. Note: If they don't appear click Save and then come back to the Outlook selection under Integration to finish the integration setup.



### Step 2: Connecting to the CRM

- In the configuration section select
  - Choose Outlook for the Outlook Profile.
  - Choose your email address for the Information Store.
  - Choose Default for the Contacts Folder.

Configuration	
Outlook profile:	Outlook
Information store:	jdoe@acmeinc.com
Contacts folder:	(Default)

### Step 3: Selecting Call Activity Options

- In the Data Connection section
  - By default leave the Cache checkbox unselected.
  - Select the call activity boxes if they are available. If both checkboxes are available it's recommended to check only one. Outlook for example does not support these two features therefore the checkboxes are grayed out.

Data connection	
<input type="checkbox"/> Cache:	Frequency: 60 minutes
<input type="checkbox"/> Create activity on call end	<input type="checkbox"/> Show activities on call

### Step 4: Testing the CRM Connection

- In the Test section
  - Enter a phone number you know is saved in Outlook contacts and click Search.
  - The result field should show information about that phone number. If it doesn't then there's a problem with the connection between CommConnect and Outlook.
  - You can also click Show Contact to verify that the correct contact screen pops forward from the CRM.

Integration test	
Telephone:	9725559700 <span style="float: right;">Search</span>
Result:	Id=000000002CEA1CEBAA7DBD40BEED2E68900658A884A72700, CompanyName, ContactName=ESI Main No., Telephone.Business=(972) 555-9700, Address, Email=it@esi-estech.com
Actions:	Show contact

### Step 5: Saving Integration

- Click Save.

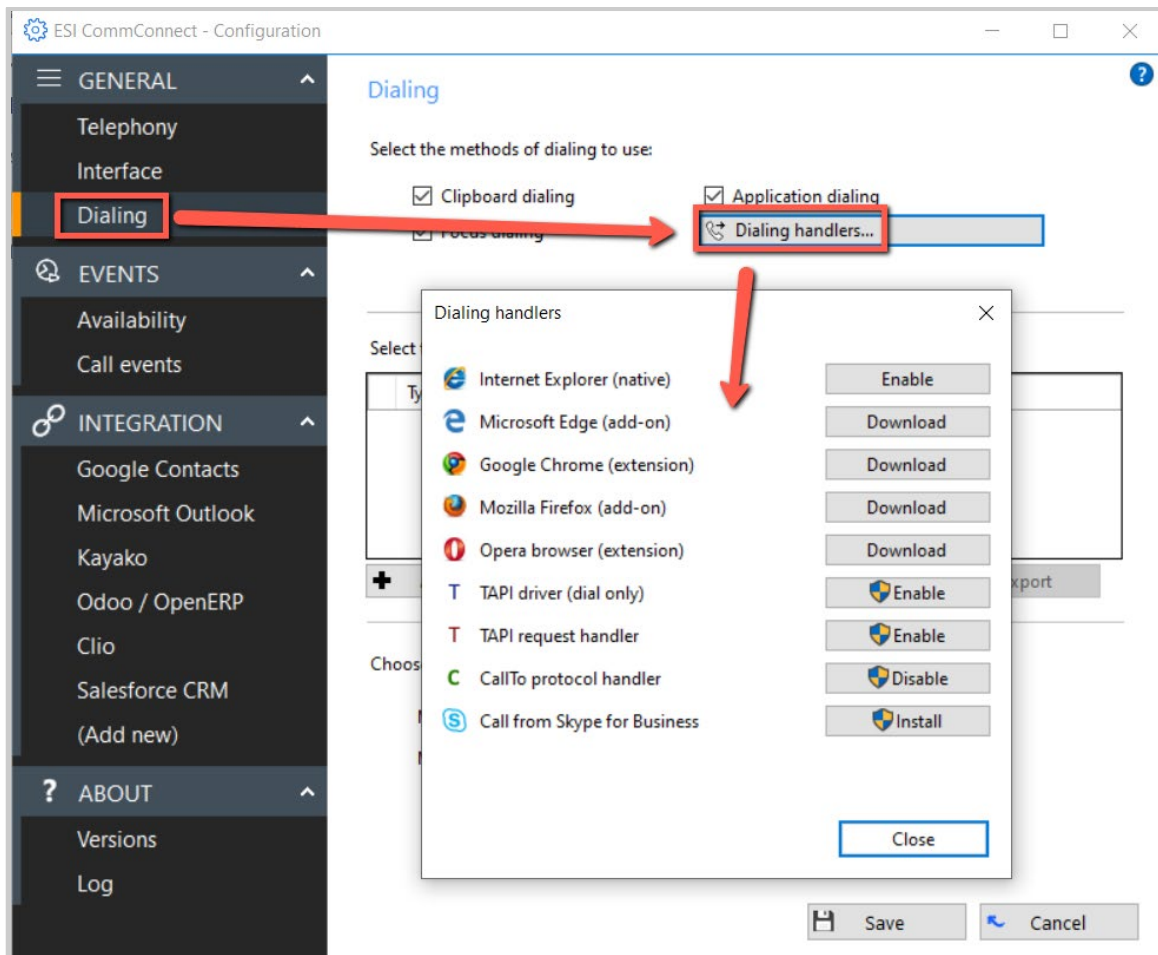
## Addendum: Internet Browser Add-in - Web Dialing

This section will guide you through the process of configuring the browser extension/add-in for web page dialing. The example below is for Google Chrome.

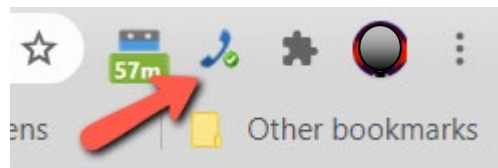
Individual guides for configuring Microsoft Internet Explorer, Edge, Mozilla Firefox and Opera web browsers are referenced in an earlier section within this document titled [Browser Extensions for Dialing](#).

### Installing the Browser Extension/Add-in

1. Right click on the CommConnect icon in the system tray (usually the far right corner on your PC).
2. Select Dialing then Dialing Handlers.
3. From the popup choose the desired browser.

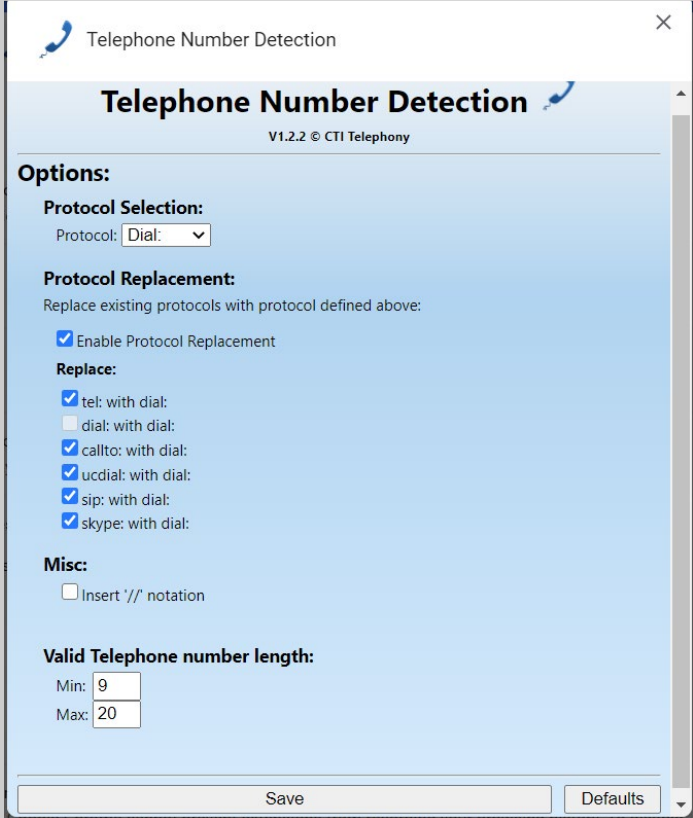


4. Follow the prompts to complete the installation. Once installed you will see a phone icon in the browser.



## Configuring the Extension/Add-in

1. Right click on the icon in the browser and select Options.
2. To account for all possible click-to-dial scenarios, set up the options as shown below.
3. The Min and Max number count be adjusted based on personal preference. For example, if you dial international numbers the maximum number may need to be longer.
4. Click Save.

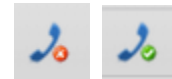


The screenshot shows a dialog box titled "Telephone Number Detection" with a close button (X) in the top right corner. Below the title bar, the text "Telephone Number Detection" is displayed in a large font, with "V1.2.2 © CTI Telephony" underneath. The main content area is divided into several sections:

- Options:**
  - Protocol Selection:** A dropdown menu labeled "Protocol:" with "Dial:" selected.
  - Protocol Replacement:** A section with the text "Replace existing protocols with protocol defined above:" and a checked checkbox for "Enable Protocol Replacement".
  - Replace:** A list of checkboxes, all of which are checked: "tel: with dial:", "dial: with dial:", "callto: with dial:", "ucdial: with dial:", "sip: with dial:", and "skype: with dial:".
  - Misc:** A checkbox for "Insert '/' notation" which is currently unchecked.
- Valid Telephone number length:** Two input fields: "Min:" with the value "9" and "Max:" with the value "20".

At the bottom of the dialog, there are two buttons: "Save" and "Defaults".

5. Be sure to click on the icon in the browser so it shows a green checkmark. This means the dialer is active. If it shows a red checkmark it's inactive.



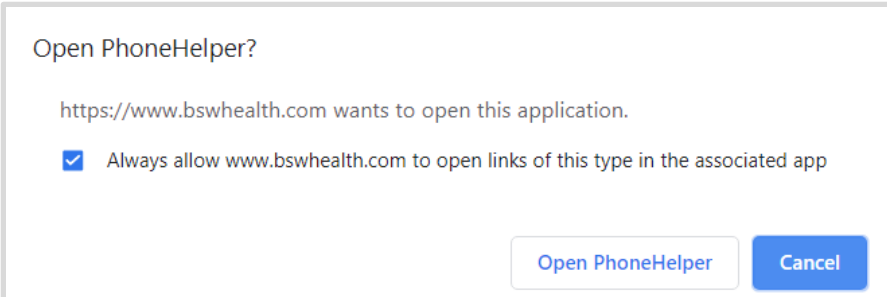
## Placing a Call

With the dialer active, numbers on webpages will be highlighted with a handset icon as shown in picture below. Note that the zip code is highlighted but is obviously not a phone number. This is because this user set the minimum number in the dialer options to eight.



Click the handset icon to place the call. You may receive a popup, like the one shown below. If so, check the checkbox if one is provided and then click Open PhoneHelper.

Whether or not you see a popup or the popup has a checkbox (so you don't continue to see the popup in the future) depends on the browser and sometimes the version of the browser. ESI nor CommConnect has control over this popup.

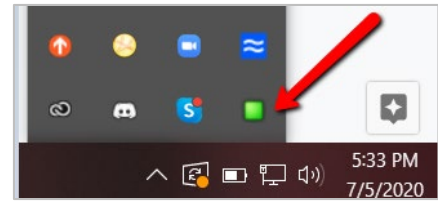


The screenshot shows a popup dialog box titled "Open PhoneHelper?". The text inside reads "https://www.bswhealth.com wants to open this application." Below this, there is a checked checkbox followed by the text "Always allow www.bswhealth.com to open links of this type in the associated app". At the bottom right, there are two buttons: "Open PhoneHelper" and "Cancel".

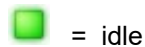
# Using CommConnect

## Tray Menu

To access the app right click on the box that appears in the system tray in the lower right corner of the PC. The box icon will appear white or gray upon initial installation.



Once the application is configured the color of the square changes to indicate the following:



= idle



= on a call

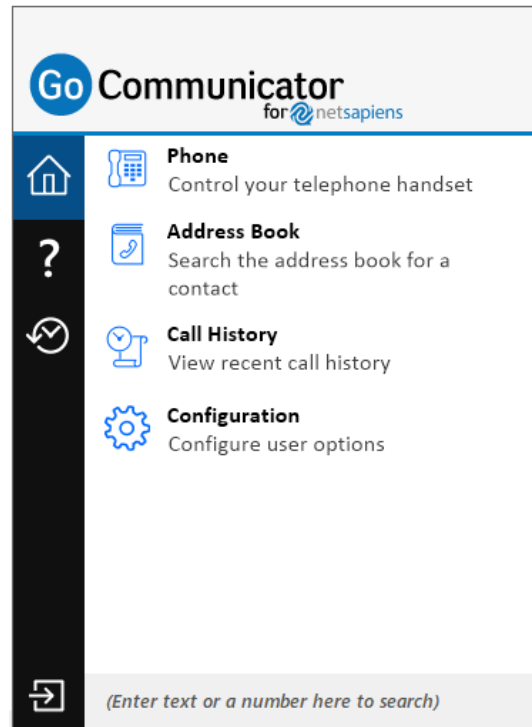


= call on hold

## Menu

Right click on the square icon in the system tray to access the features described below.

**Note:** In Windows 7 and above, some tray icons become hidden and expressly have to be shown. These settings are stored in the "Notification Area Icons" part of the Windows Control Panel.

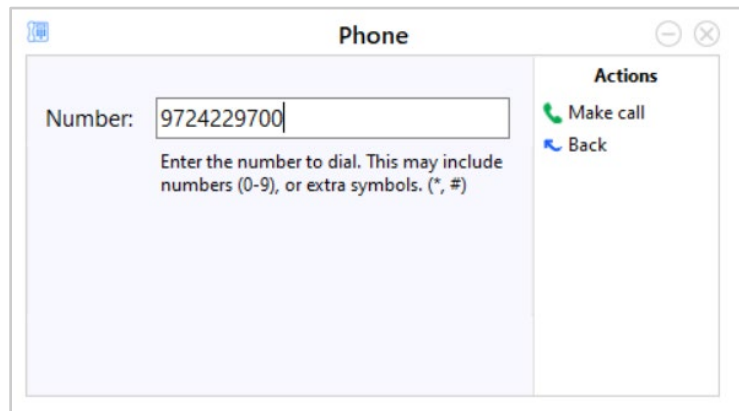


## Phone

### Outbound Dialing

The phone window is used to control your telephone handset, make phone calls and perform call related actions.

1. When the Phone window is open, enter a phone number from your keyboard.



2. Once you press Enter from your keyboard or click Make Call from the Phone window the call will be attempted, causing your ESI Phone to ring.
3. When you answer this call the digits of the number you are trying to call will be sent.
4. Once connected to the other party the Phone window will change to show information about the call and call handling options.



### Actions

Use these buttons to interact with the current call, contact and integrated applications.

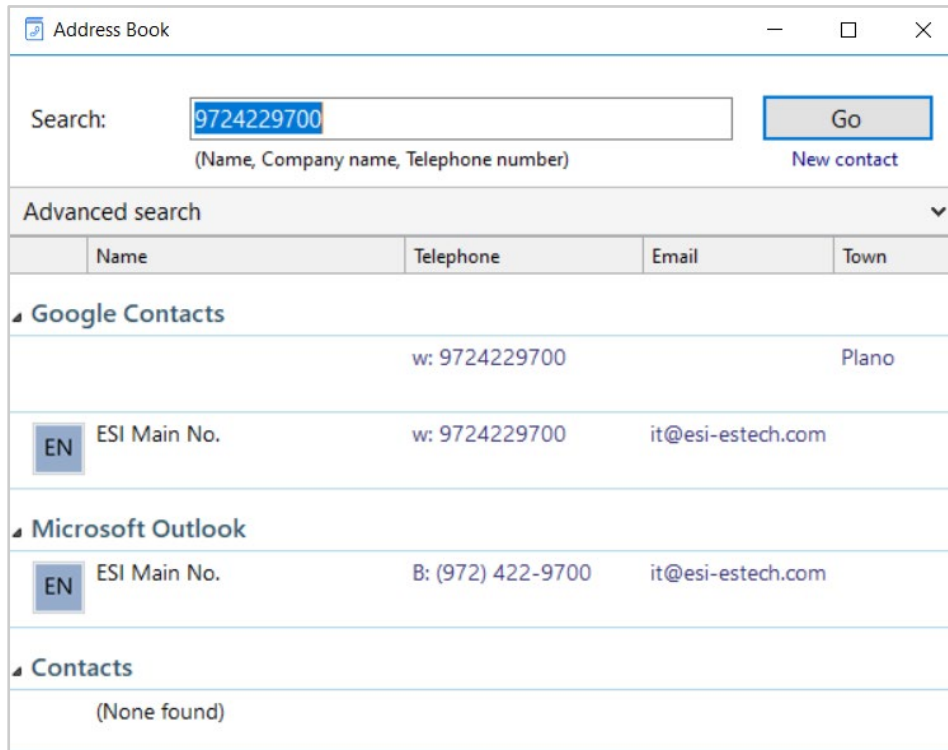
Icon	Action	Instructions
	Disconnect/Hangup	You can also disconnect my using your ESI Phone.
	Consult	Follow the prompts to create a 3-way conference.
	Transfer	Following the prompts to perform an unsupervised transfer.
Microsoft Outlook Contacts	Contact Location	Click on the CRM where the contact is located for one-click access to the contact's details.

### Address Book

The Address book provides access to a local address book included with the CRM. It's a quick way to find a contact and all the CRMs that contact is located. The Address Book only looks through CRMs that you have connected to CommConnect. In the example below the entered phone number is found in both Google Contacts and Outlook.

Click on the phone number to place an outbound call or click on the contact name to go the contact's information in the CRM.





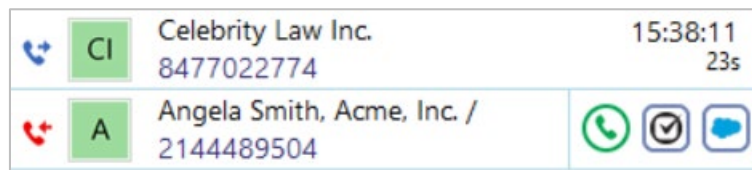
## Call History

Recent and Full call history provides a list of calls made to/from CommConnect or those made through the CRM. By default, the Call History screen returns the fifty most recent calls.

Click on the phone number to place an outbound call or click on the contact name to go to the contact's information in the CRM.

Type	Icon
Inbound Call	
Outbound Call	
Missed Call	

Hovering over a call record will present different options based on the caller ID of the record. These options include dialing the phone number, adding a new contact, and accessing the contact's information within the CRM.



## *Adding New Contacts*

There are a few places within CommConnect that provide an option to "Create New Contact". Doing so will add the contact to the CommConnect application only. It does not add a new contact to the CRM (Outlook, Hubspot, etc.).