UCconnect

UCconnect app streamlines communication with click-to-call, CRM screen pops, and seamless integration with over a dozen CRMs

Integration How-To

Downloading the Application/ Logging In

1. You would click on the link below to download UCconnect
2. https://chrome.google.com/webstore/detail/ucconnect/bpnfijgnhjjagobffmdnjhcpjpkgchfb
3. When launching UCconnect for the first time, the user will be presented with the login screen.
4. Enter the following details: · User name: ext@pbx-id · Password: portal password · Click the arrow to proceed.
5. After the initial login, this data will be stored and not be requested again unless the user logs out.

Quick Call/Select App

After logging in, you will be shown these features no matter what tab you select within the extension:

Quick Call

1. From the Quick Call field, the user can dial both internal extensions and external phone numbers.

2. When dialing is complete, press Enterto have the main device get prompted with a call that when answered will initiate the call dialed.

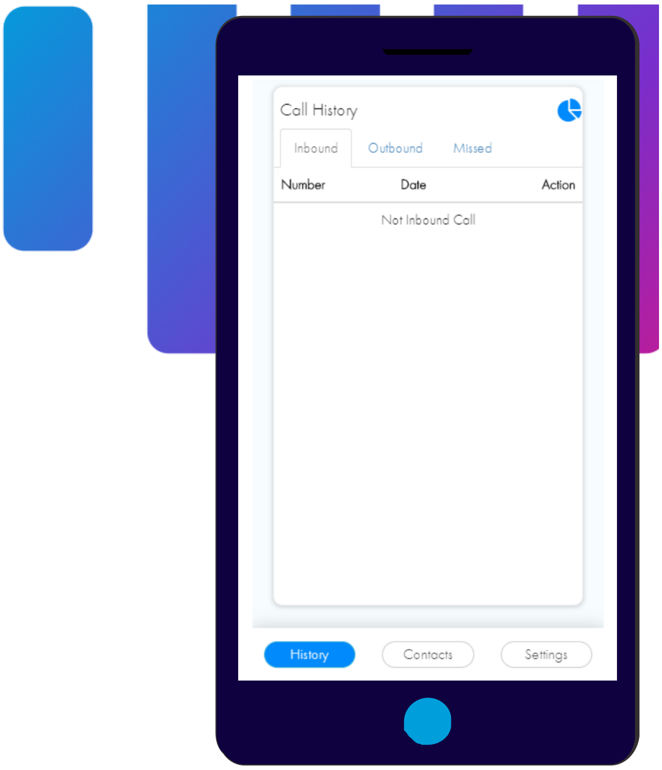
Select App

The Select App field is a dropdown box that provided you with a list of different applications you can integrate with. Here are some of the current applications you can integrate with:

- Active Campaign
- Allstate eAgent
- ConnectWise
- Dealer Socket
- eAgent
- Facebook
- Fresh Desk
- Gmail
- Google
- Google Contacts
- Netsuite
- Salesforce
- Zoho

History Tab

The tab labeled History, provides you with your call history made using the extension:

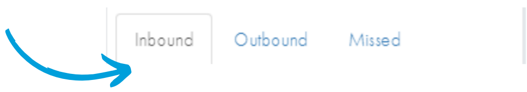


Call History

1. The Call History view displays the user's call history including inbound, outbound, and missed calls.
2. The records displayed will show the number dialed, call direction (inbound, outbound, or missed), call time, and call duration.
3. Clicking the Magnifying Glass icon allows you to initiate a screen pop with whichever app you have selected.

Changing Call History Filter

1. Clicking on the different tabs allows the user to view calls sorted by Inbound, Outbound and Missed.



Contacts Tab

The tab labeled Contacts, provides you with an area that you are input contacts manually with name and number:

Adding Contacts

1. After filling out the fields labeled Full Name and Number you click the plus icon to the right of the Numbers field to add the contact.

Contact View (Dial/Remove)

1. When viewing the Contacts tab, you have two icon to the right of the contact.
2. Clicking on the Green Phone Icon it will initiate a call to your main device ringing the number for that contact.
3. Clicking on the Red Icon will delete the contact related.