

CRM INTEGRATION WITH 3CX

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Version: 1.1



Step 1:

Download and install windows 3CX client (V15) from below link.

i). For Windows: http://downloads.3cx.com/downloads/3CXPhoneforWindows15.msi

Step 2:

Need to send 3CX welcome email. Now you can see the configuration file attachment on your email. Open up this Welcome email on your pc and double click the attachment. The attachment contains your extension details and will automatically configure your client for use with 3CX.

Step 3:

Once extension configured, you will see "On Hook" & "Available" status icon on 3cx client as per below screen shot.





Step 4:

Advanced Settings CX Settings _ x 📧 Behavior © ⊻ C Q 🔎 Language Tonfigure Accounts ≣ Enter name or number.. AA Auto Answer Recordings Enter text to search ۹ ¢[¢] Integration Audio Options cal4care Tel Video Options About 803 KA > 800 Ray > 🕮 Hot Keys 801 Danniel > 💥 Advanced Settings 802 Rk > Themes 805 > C Re-register 806 Mani > 808 CM Request Welcome Email > 809 Narissa > Import Contacts 819 RT > () Exit Client 830 A-Cordless > CD-MAIN 803 KA > 800 Ray > 801 Danniel > 802 PL \bigcirc $\langle \boldsymbol{\leftarrow} \rangle$ 👷 🗓 🕗 🔽 📮 🦀 🥵 🚺

Go to Settings \rightarrow Advanced Settings \rightarrow Behavior

<u>Step 5:</u>

- i) Select the browser you would like to open for the application.
- ii) Key in your CRM Parameter details on "Parameters to send".

Example: http://crm.umbrellapro.xyz/contacts.php?ac=view&phone_number=%CallerNumber

Behavior	x		
Focus Enabling this will bring application to front, and pressing Enter key will automatically answer call			
Transfers using Drag and Drop Select default transfer method when you drag and drop an active call. You can perform the other transfer method by pressing Ctrl key whilst dragging.			
Blind transfer			
Launch application Launch application on incoming call Path to executable Carrogram Eiler Internet Explored explore			
Browse			
Parameters to send http://crm.umbrellapro.xyz/contacts.php?i			
Notify when	Ringing -		



iii) Once done save them and make a call to Hotline Number. Now you can get the popup when the incoming number matched on your CRM.

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