

SpectrumVoIP™

STRATUSconnect Installation



STRATUSconnect

STRATUSconnect is a Computer Telephony Integration (CTI) product designed to facilitate a direct pairing of your VoIP extension and computer peripherals.

STRATUSconnect is a third-party application so therefore it is not considered a free Stratus Feature. Customers that elect to receive product will incur an additional cost per seat.

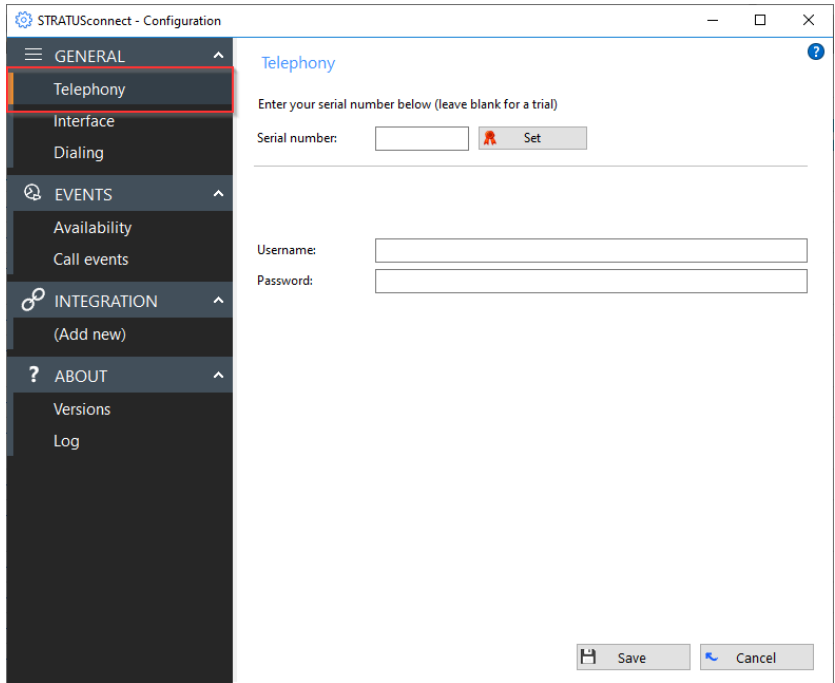
Installation

If the link was not already provided to you, here is the direct link to download our integration software called **STRATUSconnect**. This link will be used by whichever users need access to this integration, and each user will need to download from this link:

<https://stratus.spectrumvoip.com/spectrum/customfiles/STRATUSConnect-3-2-0-18443.14519.exe>

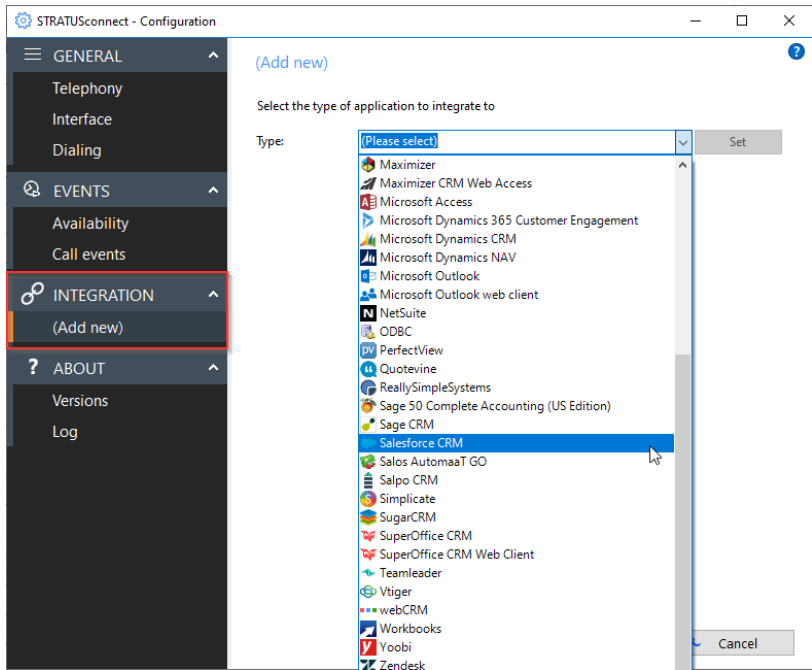
The license (serial number) for this application will be the same for each user that needs access to this integration tool.

Once downloaded the license will be entered under the Telephony tab in the field to the right of “Serial Number.” Once entered, press the “Set” button. The username and password under this telephony tab is going to be the same sign in as the Stratus web portal (typically [extension-number]@domain.com)

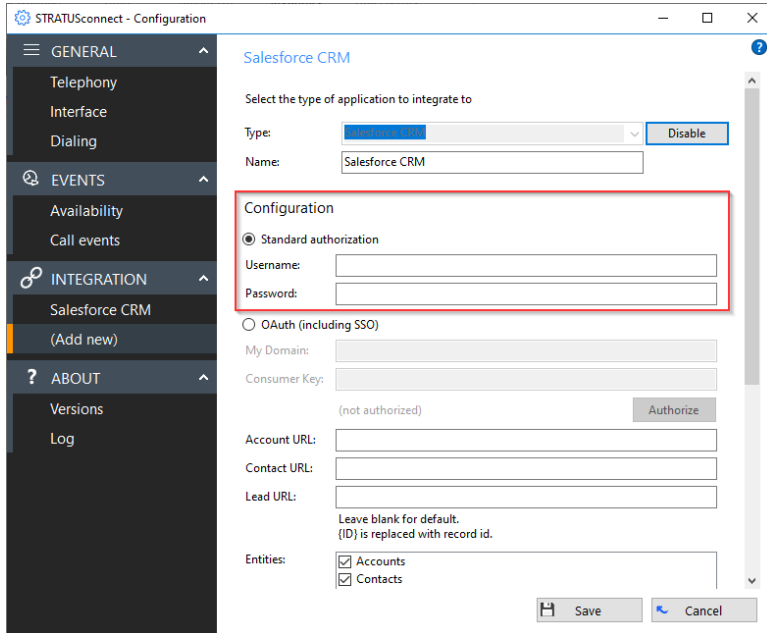


To add the integration for Salesforce, Click on “Add New” under the Integration tab on the left hand side.

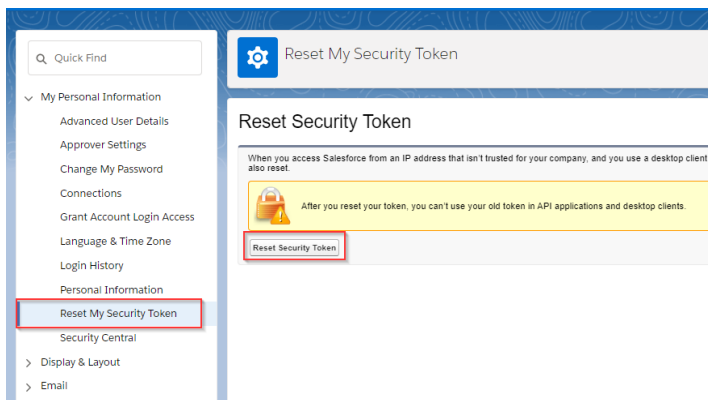
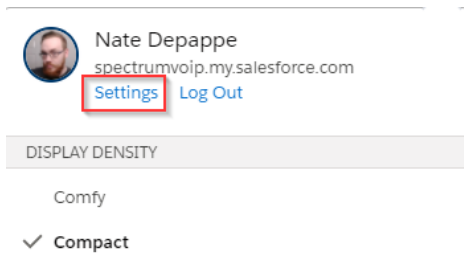
Click the drop down to the right of the field “Type” and select “Salesforce CRM” from this drop down list, then click set.



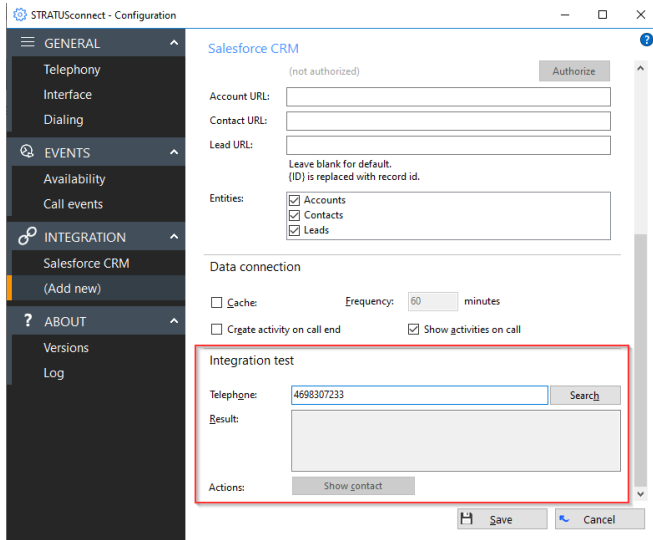
Once set, under the field labeled “Configuration”, the username that will need to be entered is the same username you would use to sign into salesforce.



The password is going to be a combination of your salesforce password AND the security token for Salesforce. To obtain this token if you do not know it, go to your profile *settings* > *Reset My Security Token*, and click the *Reset Security Token* button.



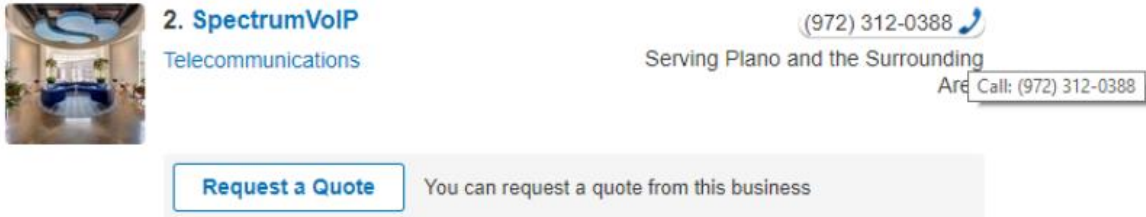
To test the integration once all of the above has been configured, scroll to the bottom of the Salesforce CRM tab under integration. In the field labeled Integration Test, you should be able to enter in a phone number in the Telephone field and press search. If a bunch of string information displays in the field to the right of “Result”, this integration should be good to go.



STRATUSconnect Features

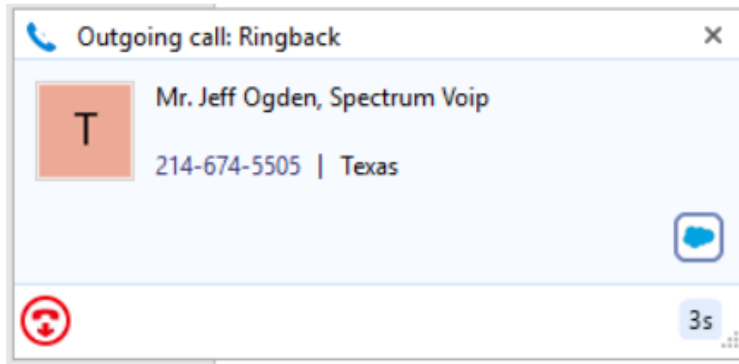
Click to Call

A user can have this functionality within ANY application on the desktop, all browsers, text boxes, and anything that can be copy/pasted



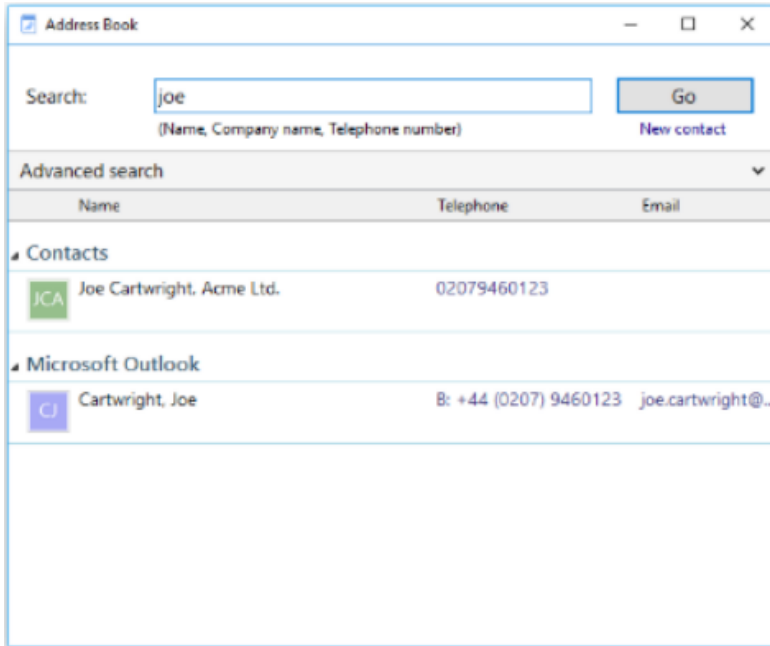
Screen Popping

A user would receive a popup window listing up to 5 CRMs in a list view where the user can select the CRM they want to open with the caller's information.



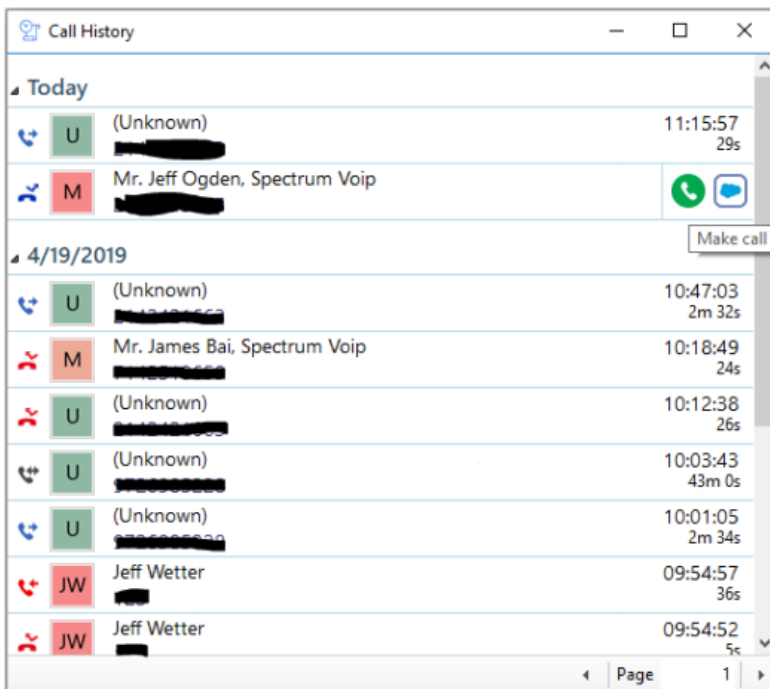
Address Book

Users can search for existing contacts or create new ones easily while on the telephone. The Address book is extended to include CRM contacts when integration is used.



Call History

The Call History window contains a list of an extension user's recent calls and allows the user to click to call directly from there



Multiple Active Integrations

STRATUSconnect supports up to 5 simultaneous CRM integrations at once

Busylight

STRATUSconnect will integrate with a USB busylight that can be mounted on a desk or cubical. This will let people in the office know when you are on the phone by the color of the light. It will even work when you are on your StratusMobile Application.



You should have additional features for this integration such as activity creation/tracking, click to call, screen popups, etc, that you can select under **Dialing**, **Call Events**, and the **Data Connection** field (located under integration).

Create Activity on Call End under **Data Connection** should generate an activity in Salesforce for the conversation you just had.

Show Activities on Call will take you to the activity that is created during the call so you can edit or update it.

You can also adjust what type of call will generate what type of action under **Call Events** for both inbound calls that are ringing, inbound calls that you answer, and outbound calls that you place.

The options available for these three call types are to display a window notifying of the call, a window that shows the contact that is calling/being called, or the generation of a new activity entirely.