

AllCloud Integrator

Quick User Guide

AllCloud Integrator is an application for PC that works with your hosted voice system. Features include desktop call control, click to dial, and contact search with Outlook and Google. Users with Allied Collaborate service packs will receive an upgraded license that will allow them to integrate their phone system to most popular CRM tools.

Getting Started

Download Information

Download AllCloud Integrator from the Allied website: <https://www.alliedtelecom.net/resources/allcloud-integrator-resources/>

After the AllCloud Integrator application is downloaded, it will live in your computer's system tray. To access it, click the arrow on your system tray and right click the Integrator icon. This will open the Integrator System Tray Menu. The Integrator icon will be a green square (or red if you're on a call or yellow if a call is on hold).

Configuring Preferences

Before you can use AllCloud Integrator, you will need to configure specific preferences. Open the System Tray Menu and Click on Configuration.

- Telephony (Telephony is how Integrator will be used to facility calling.)
 - Select your Method
 - HTTP(S) protocol is the standard method. With HTTP(S) is selected, when you place an outbound call through Integrator your desk phone will ring. Pick up the ringing call on your desk phone and the outbound call will be placed.
 - UC-One can be selected by users who use AllCloud UC-One. When selected, Integrator will work in conjunction with UC-One for desktop to facilitate calling.
 - Username and Password: Enter your AllCloud Credentials
 - Click Save

Configure additional options under Interface, Dialing, Availability ("Update Skype for Business state when on a call" is not recommended to be selected), and Call Events, by selecting those sections from the left side bar. For additional information, click the Help.

Adding Outlook and Google Contact Search

Open the System Tray Menu and Click on Configuration.

- Under Integration, click (Add New)
- Use the dropdown to select Microsoft or Google Contacts (both can be added individually)
- Click Set
- A Configuration box will appear. Use the dropdowns to update your Outlook profile, Information store, and Contacts Folder.
- Test the integration by typing the phone number of an Outlook contact in the Telephone field in Integration Test. Click Search. The result should show in the result field.
- Click Save to save the integration.

AllCloud Integrator Quick Tip

Click on Help- found on the configuration page- at any time during your app experience to get help, additional information, and instructions.

Enabling Click to Dial from a Web Browser

With Click to Dial enabled, you can click on any phone number in a configured browser to place a call to that number. To configure Click to Dial, open the System Tray Menu and Click on Configuration.

- Under General, click Dialing
- Click the box labeled Dialing Handlers...
- Click the Download button for any browser you want to enable the browser extension/add-on



System Tray Menu >
Configuration

System Tray Menu

Toolbar- Click to open a Toolbar to manage inbound and outbound calls. Configure Toolbar under “Configuration” and “Interface”. The Toolbar is a dockable user interface that allows many of the core features to be utilized.

Address Book- Use the Address Book to Search contacts from your company’s Enterprise Directory, your Outlook Contacts, and your Google Contacts.

Recent Calls- View your recent calls. Hover over an entry to get the option to call back, add to contacts, or view profile.

Features- Configure a Forward To destination for your business phone and/or change your Do Not Disturb (DND) status.

Search- Use the search bar to find contacts in your Enterprise Directory, Outlook Contacts, and Google Contacts. Hover over the search result for additional options including call.

Exit- Exit out of the AllCloud Integrator application.

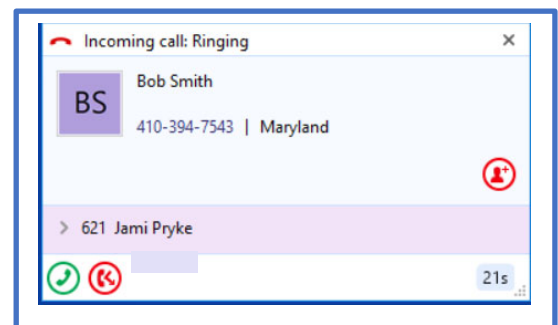


Preview Window

The Preview Window is displayed when an inbound or outbound call is ringing. It will show the direction of the call, Caller Details (obtained from your Enterprise Directory and your Outlook or Google Contacts), Caller Notes (if applicable), and Caller ID. Add the caller to your Integrator contact list by clicking the “Add Contact” icon.

The Preview Window also contains call controls including answer and deflect. With standard HTTP(S) telephony, when you click answer call, your speakerphone on your physical phone will pick up. UC-One users with UC-One as your telephony method will be able to use UC-One to facilitate answering when Answer is selected in the Preview Window.

When the call is answered, the Preview Window will close after a few seconds.



Call Controls

Manage active calls with Integrator Call Controls.

	Answer	When a call is ringing, you can choose to answer the call by clicking the “Answer” button or deflecting it (transfer it without answering it) to another extension.
	Deflect	
	Hang Up	End the call.
	Hold	Pause the call. The caller will hear hold music if available.
	Consult	Place the current call on hold pending a transfer, and makes a concurrent call to the selected extension.
	Transfer	Transfers the call immediately to the selected extension (remember to say goodbye first!)
	Show Contact	Shows the caller’s full contact details, as obtained from the Personal Phone List (PPL)
	Add Contact	Add the caller to the PPL and fill-in their details during the call.
	Pop Contact	Shows the caller’s full contact details from the CRM or other integrated application. The icon will be that of the application (example shown here for Outlook).

Dialing Options

Place calls using AllCloud Integrator by using the following capabilities: Quick Dial from the System Tray Menu (type a phone number in the entry box and press enter), System Tray Menu Search (type the name of a contact in the entry box to search and dial), Recent Calls, Clipboard Dialing, and Click to Dial from a website.

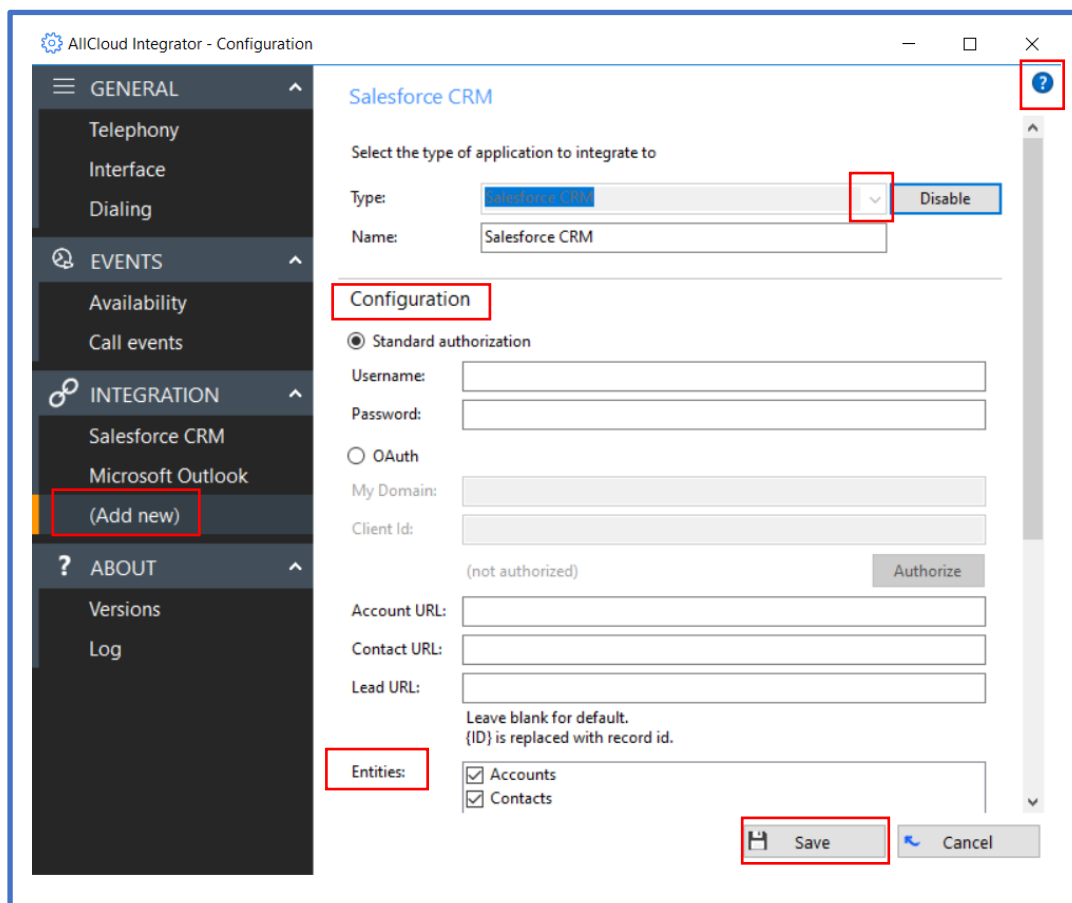
CRM Integration (Available for Collaborate Service Pack users)

AllCloud Integrator facilitates phone system integration with many CRM platforms. Up to four integrations can be added per user.

CRM Integration will facilitate providing contact information and access within the CRM upon receipt of a placing or receiving of a phone call or contact search, log phone activities or tasks within the CRM (with some CRMs), and show in the preview pop up window where inbound calls are coming from (i.e. a direct call, hunt group call, call center queue, or auto attendant option).

To add an integration:

- Open the AllCloud Integrator System Tray Menu by right-clicking on the Integrator icon in your System Tray
- Click "Configuration"
- On the left side bar, under Integration, click "Add New"
- Use the dropdown to choose the CRM type to integrate with
- Fill in the required fields to complete integration. *Note: Use the help tool to obtain instructions on how to add integrations and provide additional information. Help is the blue question mark located in the top right corner of the configuration window.*



Allied Support and Resources

Allied Support: (202) 349-0440 or support@alliedtelecom.net

Additional Resources: <https://alliedtelecom.net/support>