# CRM Phone Usage

## Setting Extension Up in CRM

1. Log in to the CRM
2. Click the cog item in the top right hand side of the CRM

   ⚙

3. Click Settings

   ⚙ Settings
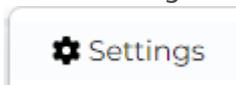
4. On the left hand menu select Phone

   ## Your Settings

   Your Details

   Email Settings

   Printers

   Phone

   Plugins
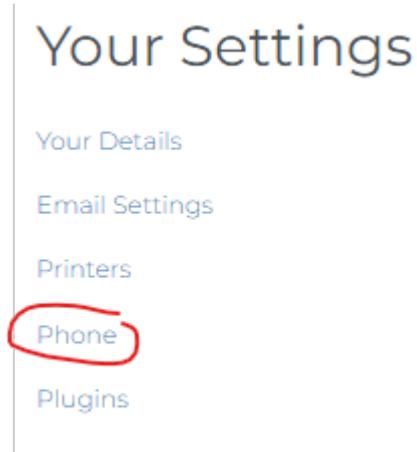
5. You will be asked to give permission for your microphone to be used.

   **You must select yes to giving permission to use your microphone.  Your phone will not register without this information**

6. Fill in the form with your provided details

## Authentication

| | |
|---|---|
| Username | 6000 |
| Password | ·········· |

## Audio Settings

| | |
|---|---|
| Speaker | Default - Speakers (2- Realtek High Definition Audio(SST)) |
| Ringer | Default - Speakers (2- Realtek High Definition Audio(SST)) |
| Microphone | Default - Microphone Array (2- Realtek High Definition Audio(SST)) |

✔ Auto Gain Control
✔ Echo Cancellation
✔ Noise Suppression

## Other Settings

| | |
|---|---|
| Auto Login? | Yes |
| Enable Notifications? | No |

**Save**

7. After clicking save, your phone should automatically try to log you in.

8. 
   ● 📞 Robert McCombe <6000>    📇
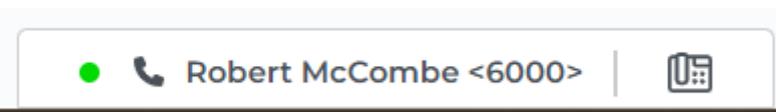
# Outgoing Calls

1. Click the phone icon to load your phone

   ● 📞 Robert McCombe <6000>    📇
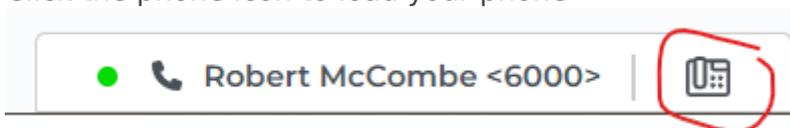
2. This will load the dialpad
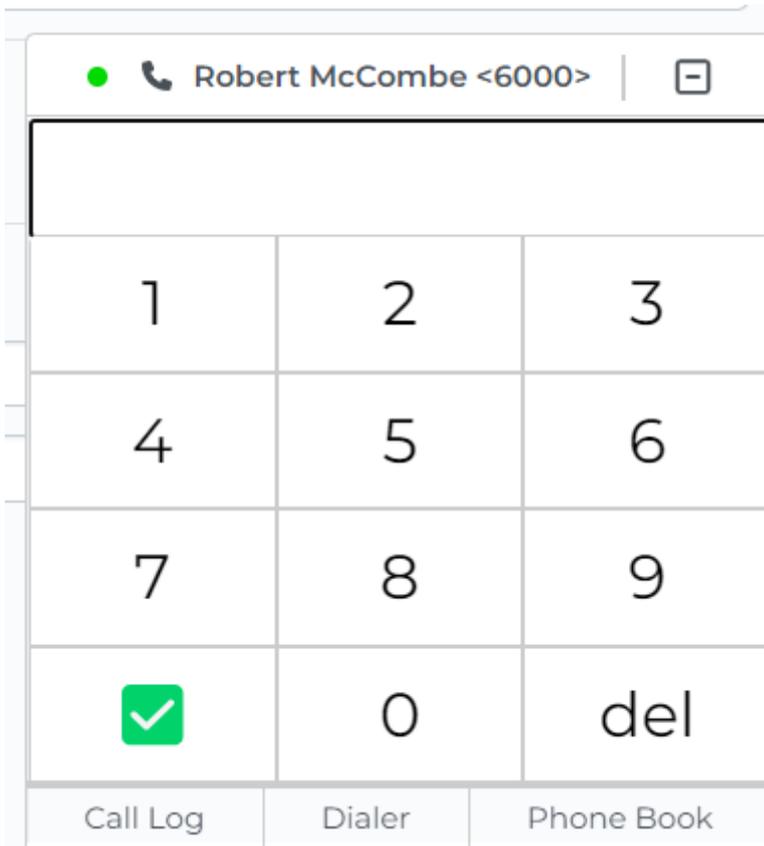
3. **You do not have to enter a 9 before the number to make an outgoing call**

4. You can either click the green tick button or press the enter key to call someone

# Transferring Calls

1. You can transfer calls by using the transfer button



2. This will list available agents or you can transfer to the holding queues
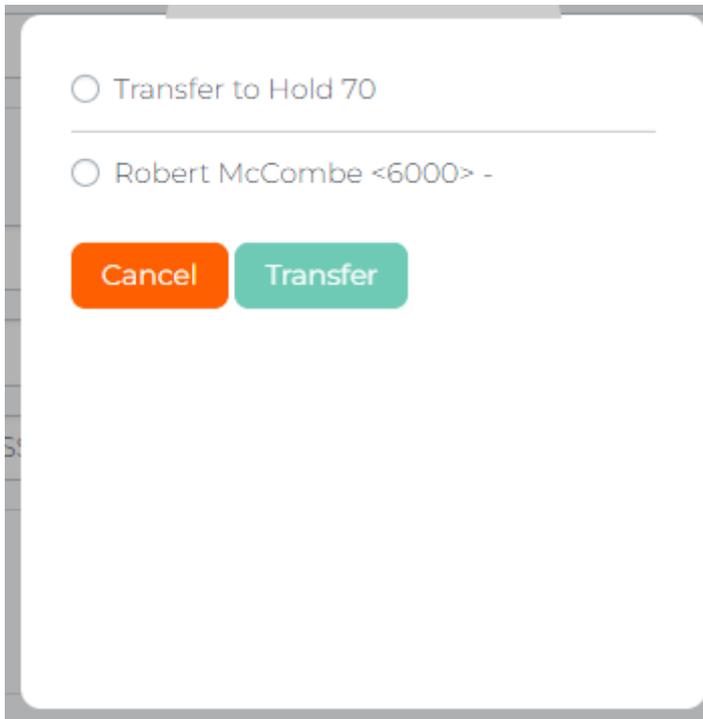
## Putting a Call On Hold

1. You can place a call on hold using the hold button



2. You can take a call off hold by pressing the play button



## Using the Phone Book

1. You can phone any customer or supplier from the phone book with a quick search
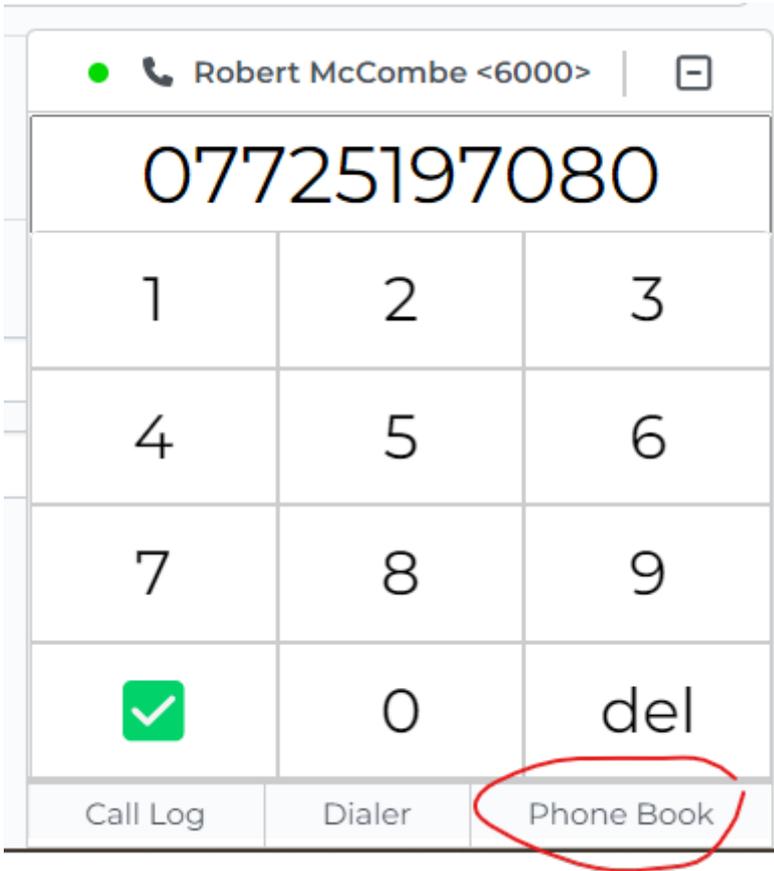
2. By default the phone book shows available other users