

## **Screen POP Up setting configuration for 3CX Phone System**

We setup demo portal which belongs to the following features:

### **Features:**

- Screen popup on inbound call
- Manage Campaign
- Customer Data management
- User Management
- Click to call
- Call summary management

### **Admin Login Details for CRM Portal**

**URL:** <http://demo.umbrellapro.xyz/admin/>

**Username:** admin

**Password:** welcome

### **User Login Details for CRM Portal**

**URL:** <http://demo.umbrellapro.xyz/admin/>

**Username:** 801

**Password:** 801Agent1

**URL:** <http://demo.umbrellapro.xyz/admin/>

**Username:** 802

**Password:** 802Agent2

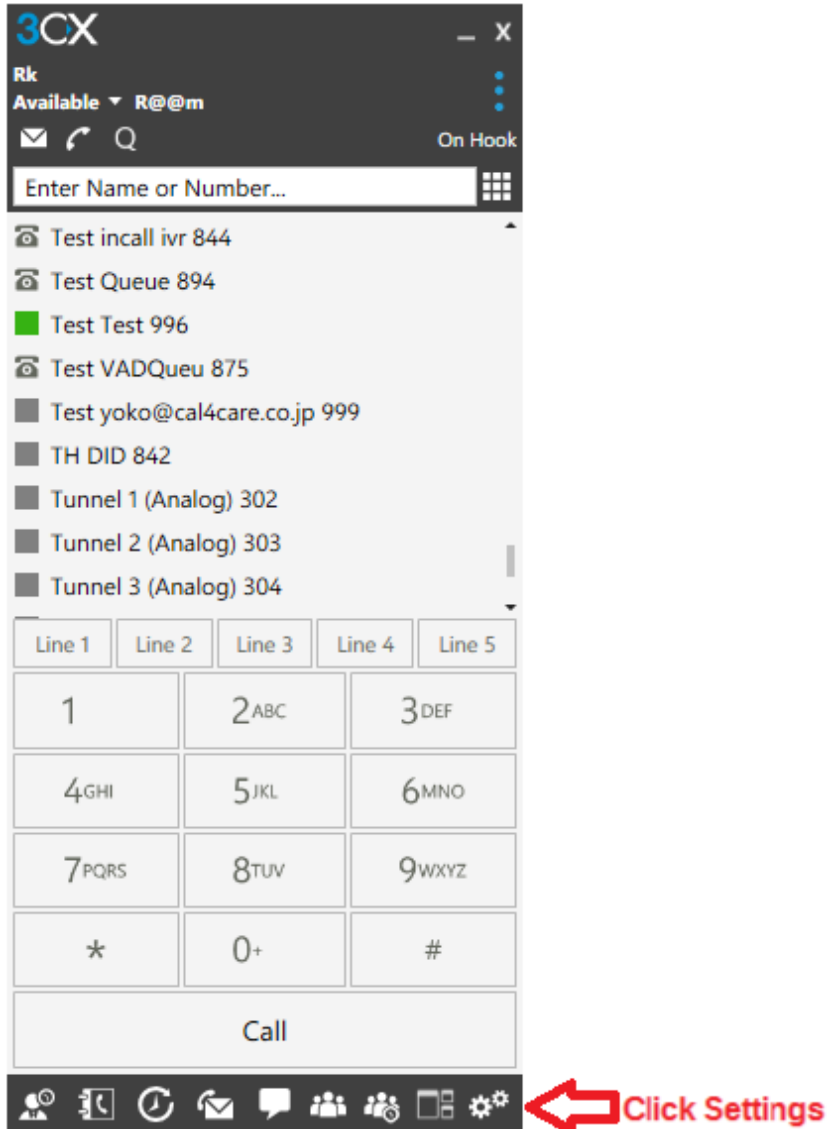
### **Configuration Steps for 3CX Softphone**

**Parameter to send:**

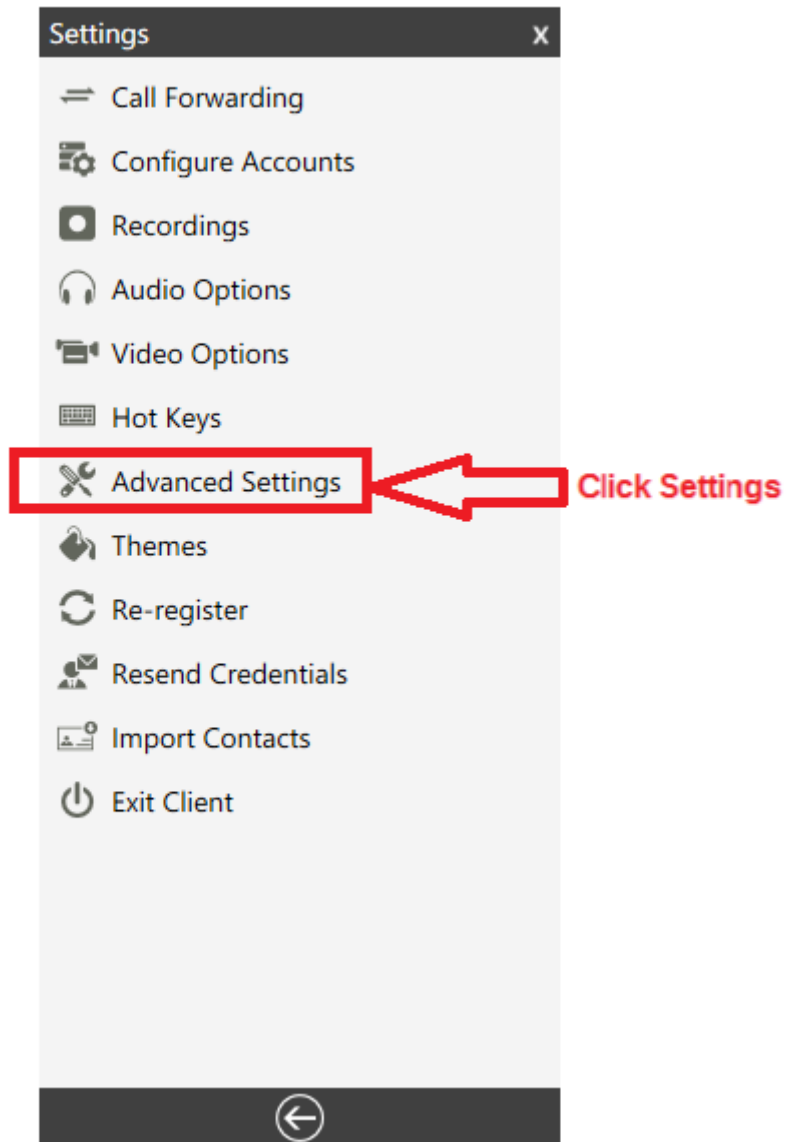
[http://demo.umbrellapro.xyz/admin/contacts.php?ac=view&phone\\_number=%CallerNumber%](http://demo.umbrellapro.xyz/admin/contacts.php?ac=view&phone_number=%CallerNumber%)

Please follow the below steps to initialize the above parameter to 3CX softphone:

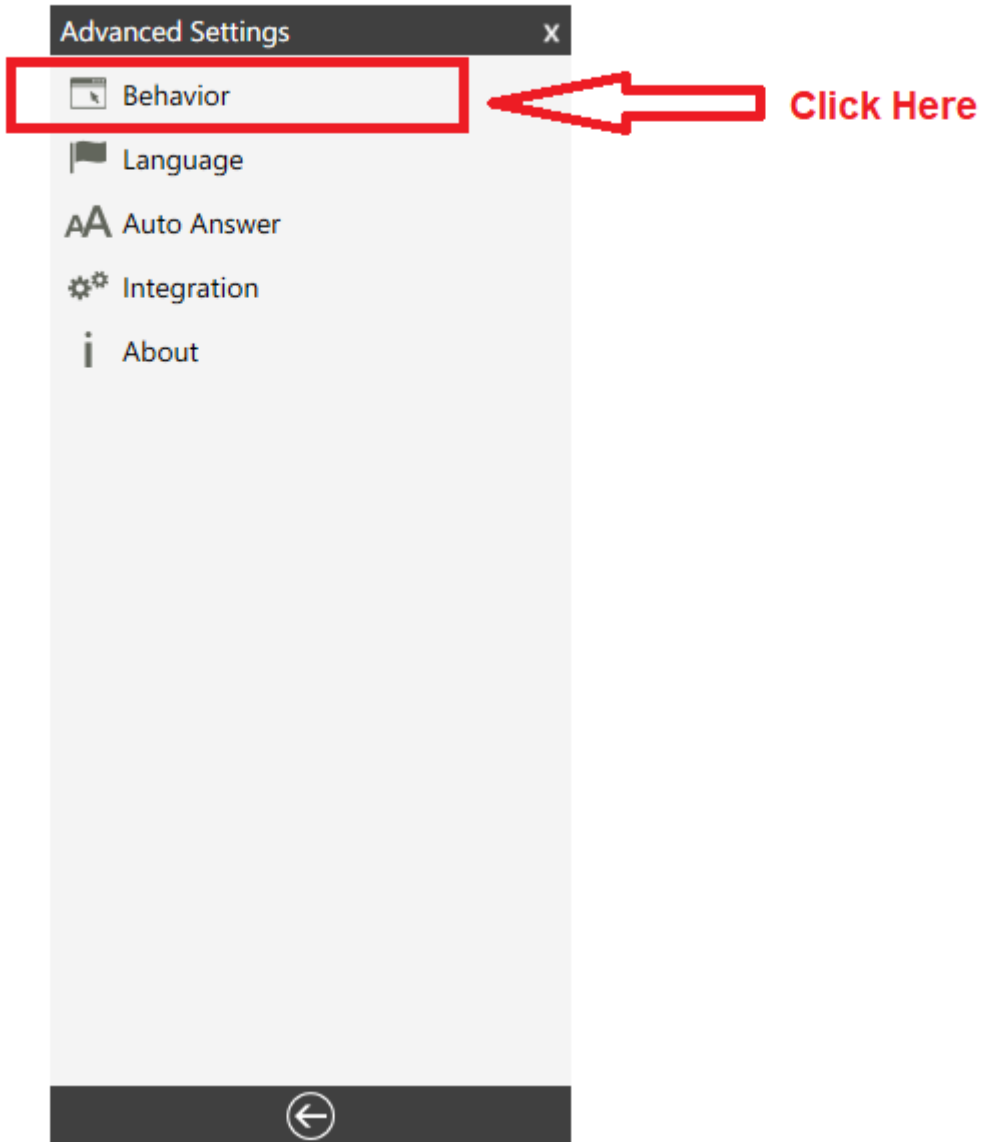
1) Open **3CX Client** and click **Settings** (Shown in below Fig :)



2) Click **Advanced Settings** (Shown in below Fig :)



3) Click **Behavior** (Shown in below Fig :)



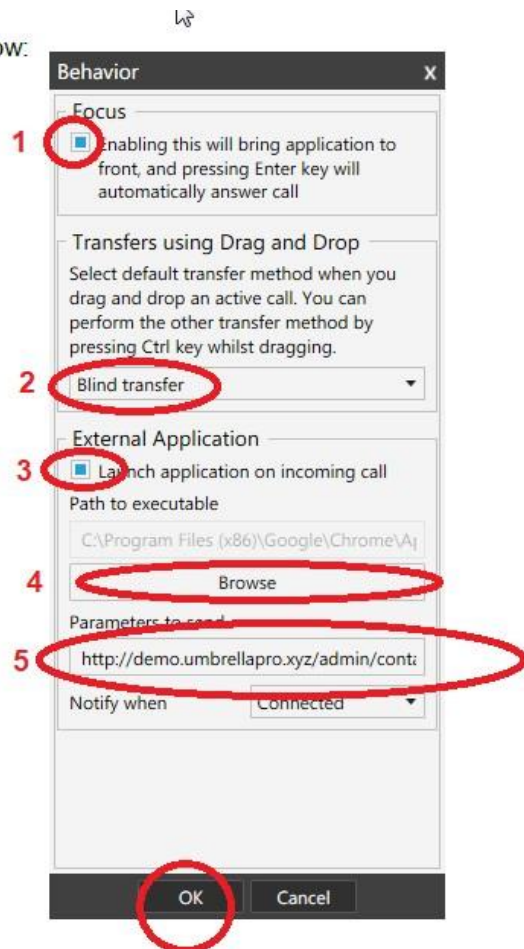
4) In Behavior Panel follow the steps as per number shown below:

1. **Focus:** Select Checkbox as per (Shown in below Fig :)
2. Select **Blind transfer** as per (Shown in below Fig :)
3. **External Application:** Select Checkbox as per (Shown in below Fig :)
4. Choose your Browser **e.g. Internet Explorer** from the installed location (e.g.: C:\Program Files (x86)\Internet Explorer\iexplore.exe)

5. **Parameter to send:** Copy paste the below url:

*[http://demo.umbrellapro.xyz/admin/contacts.php?ac=view&phone\\_number=%CallerNumber%](http://demo.umbrellapro.xyz/admin/contacts.php?ac=view&phone_number=%CallerNumber%)*

6. Click **Ok** button







When you receive call, if the customer Contact Number is already saved on your portal then it will open up your details.

## Contact List

### Information List

#### Customer Search Details

Customer Name :	Thilak
Address :	test address
City :	Singapore
State :	Singapore
Zip Code :	649188
Country :	Singapore
Phone :	<u>63401006</u>
Email :	rt@cal4care.com
Notes :	02-02-2018   Add More

[Back to List](#)

If it is new customer, then it will open up the New Contact page to save the details.

## Contact List

### Information List

#### New Customer Entry

Select Campaign\*

Select Campaign ▼

Customer Name\*

Enter Customer Name

Address\*

Enter Address

City\*

Enter City

State\*

Enter State

Zip Code\*

Enter Zip Code

Country\*

Enter Country Name

Phone Number\*

60327123106

+ Add More

Email-ID\*

Email

+ Add More

Notes\*

01-02-2018 📄

+ Add More

✓ Save

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CRM Portal is a demo version we can customised how you need.