CONTACT CONNECT USER DOCUMENTATION

As of: October 2025

CONTENTS

1 INTRODUCTION

Contact Connect enables seamless integration between Enreach Contact Desktop and your CRM, ERP, or contact database. With this integration, incoming calls are instantly recognized, and you gain quick, direct access to the corresponding contact card in your CRM. If the caller's phone number exists in your system, their name and company details are automatically displayed in a notification, ensuring you always know who is calling before you pick up.

2 INSTALLING AND LOGGING INTO CONTACT CONNECT

You can use Contact Connect in two ways:

Using the Administration Tool

Download and install the Contact Connect Administration tool:

Contact Connect Administration tool download

After installation, start the tool and log in with your Enreach Contact credentials.

Using the Browser Application

Open the browser-based version at:

https://contactconnect.enreach.com/

Log in with your Enreach Contact credentials.

This option allows you to use Contact Connect without installing additional software

To set up integrations, you require CRM Administrator rights, which must be assigned in Enreach Contact Administration.

3 INTERFACE

From the interface you can add and edit custom applications and have an overview of the applications that are already added.

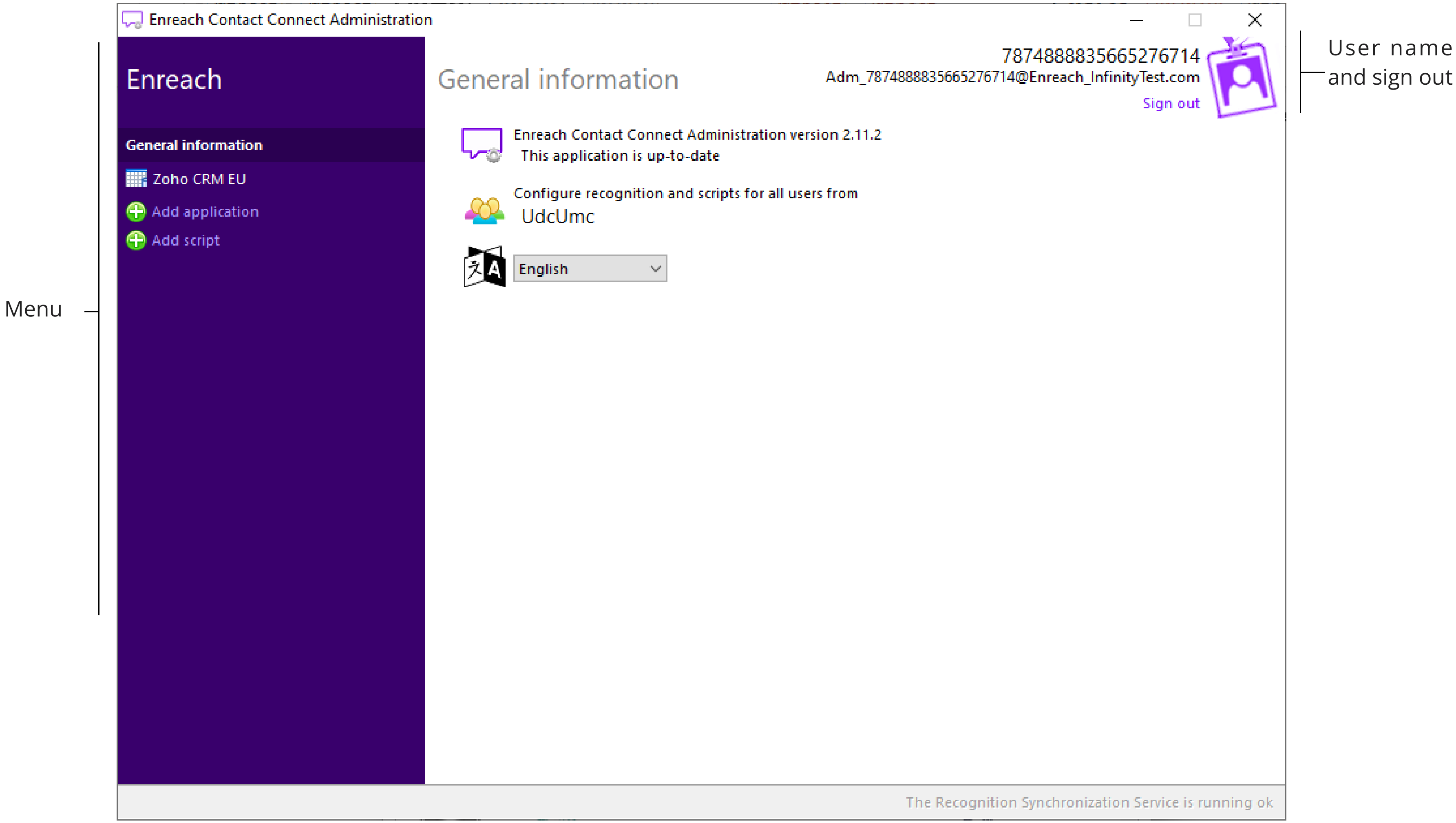


Abb. 3-1: Homepage (display may vary)

4 CONFIGURING THE CRM INTEGRATION

You can create an integration with your CRM package(s), ERP and/or contact database(s) using the Enreach Contact Administration tool. The Contact Connect Administration tool establishes the connection between Contact Connect and the CRM applications you use.

The contact information is by default updated in the recognition software once per day. To change this setting, see *4.4.4 Configuring synchronization information*, Seite 9.

The Contact Connect Administration tool can only recognize new contacts in your CRM package and add them to the recognition software if the computer on which it is installed is accessible on the network. It is therefore recommended to install the Contact Connect Administration tool on a computer or Windows server, that is regularly (or continuously) running.

4.1 LINKING PRECONFIGURED APPLICATIONS

Many applications are directly supported and can be linked by entering your credentials of the corresponding application.

To link a preset application

1. Login to the Contact Connect Administration tool.
2. Click on Add application.
   ✓ The list with directly supported applications appears.
3. Choose an application from the list or enter the name of the application in the search bar.
4. Enter your credentials for the respective application and click on Next.
   ✓ The connection to the application is established.

If the Contact Connect Administration tool doesn't automatically recognize columns with telephone numbers, you can select other columns manually.

4.2 LINKING CUSTOM APPLICATIONS

If the application you want to use is not in the list of preconfigured applications, you can link an application manually. You have the following options:

Excel file

You can upload an excel file to link an application to your CRM application.

ODBC connection

You can use an ODBC (Open Database Connectivity) method to access your CRM application database and read data. Based on this data, a link with your CRM application can be established.

Text file

Many CRM applications offer the possibility to export contact data to .csv or .txt files. These export files can be read and used to establish the link with your CRM application.

To link a custom application

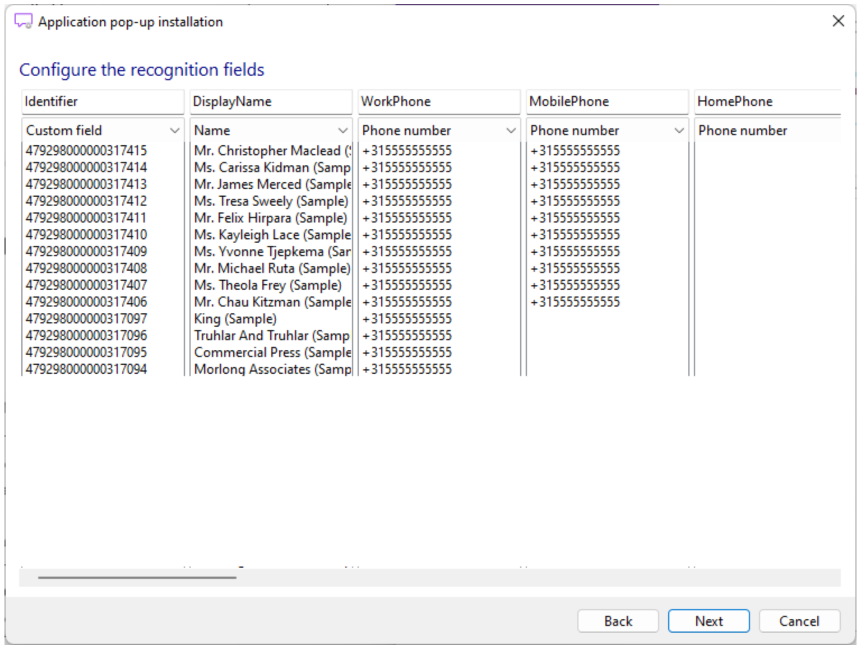
1. Login to the Contact Connect Administration tool.
2. Click on Add application.
   ✓ The list with directly supported application appears.

3 Click on **Custom configuration**.

4 Choose the method you want to use and upload the corresponding file.

✓ The connection to the application is established and the Contact Connect Administration tool recognizes which database columns are available for indexing.

> If the Contact Connect Administration tool doesn’t automatically recognize columns with telephone numbers, you can select corresponding columns manually.



4.3 CONFIGURING NOTIFICATIONS

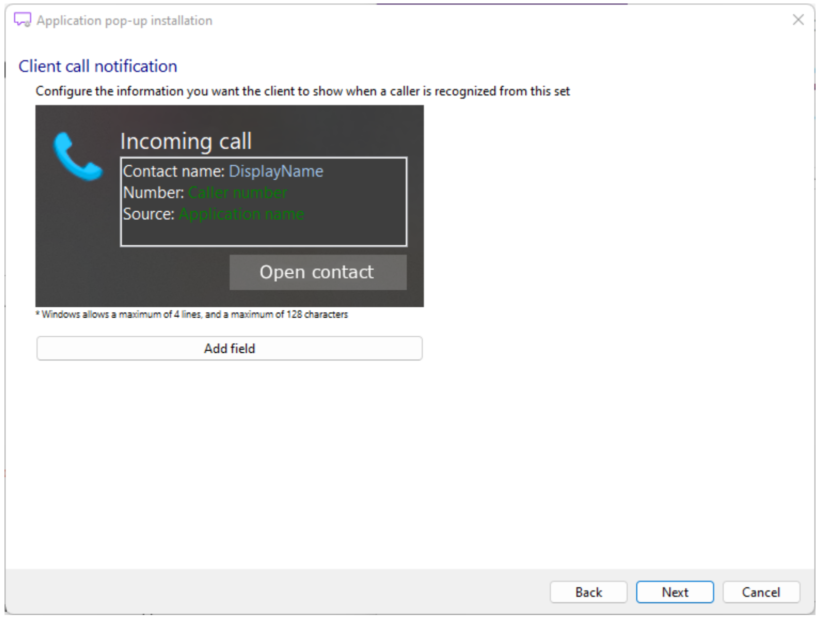
After setting the recognition fields, you can configure the pop-up notification for Enreach Contact Desktop. You can configure which information you want to show in the notification when an incoming call is recognized.

To configure notifications

1 After successfully setting the recognition fields, click on **Next**.

✓ The **Client call notification** window appears.

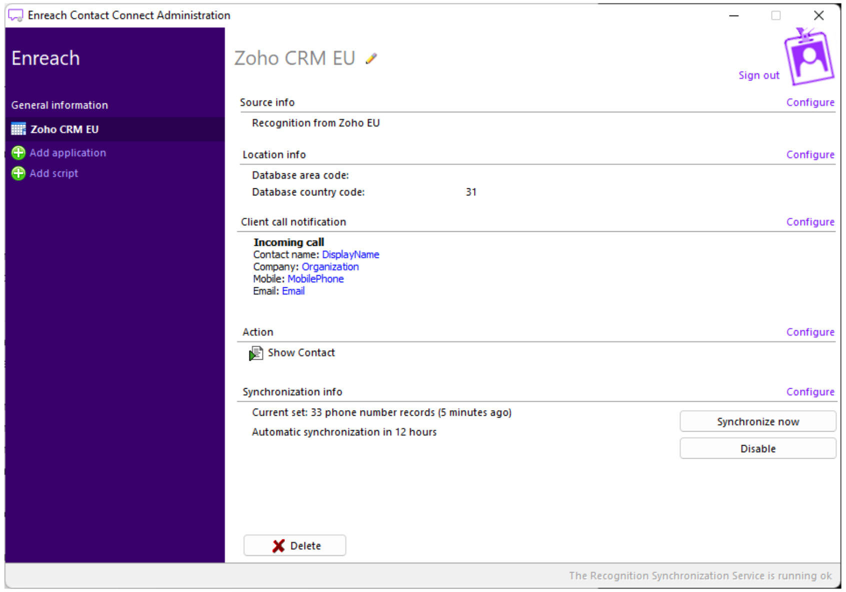
2 Click on **Add field** and enter the text you want to be shown in the notification when an incoming call is recognized.



4.4 CONFIGURING CRM

Once the CRM application is set up, you can configure the following settings:

- Location information
- Client call notification
- Action
- Synchronization information



4.4.1 CONFIGURING LOCATION INFORMATION

You can configure which area and country code should be used if this information is missing in the telephone numbers in your CRM database.

It is possible that area or country codes are not always filled in, e.g. in CRM applications that contain many local contacts. The region or country code specified here is then automatically added.

To configure location information

1. Click on the CRM application you want to edit in the menu.
2. Click on Configure next to Location info.
   ✓ The configuration page appears.
3. Enter the area and country code that should be used if the information is missing in the CRM database.
4. Click on OK.
   ✓ Your changes are saved.

4.4.2 CONFIGURING CLIENT CALL NOTIFICATION

Under Client call notification you can add recognition fields and conversation fields.

To configure client call notification settings

1. Click on the CRM application you want to edit in the menu.
2. Click on Configure next to Client call notification.
   ✓ The configuration page appears.
3. Configure the information you want to be displayed when a caller is recognized by adding fields and editing them in the display shown.
4. Click on OK.
   ✓ Your changes are saved.

4.4.3 CONFIGURING ACTIONS

Under Action you can view and edit the contact script.

To configure the action settings

1. Click on the CRM application you want to edit in the menu.
2. Click on Configure next to Action.
   ✓ The configuration page appears.
3. Click on Show Contact to edit the currently active script.
   or
3. Click on Add a new script to create a custom script or choose from a list of predefined scripts.
4. Click on OK.
   ✓ Your changes are saved.

4.4.4 CONFIGURING SYNCHRONIZATION INFORMATION

Under Synchronization information you can choose with which frequency you want the Contact Connect Administration tool to synchronize the CRM database to the Contact Connect cloud. You can choose from the following options:

- Only synchronize manually
- Automatic synchronization every hour
- Automatic synchronization every day
- Automatic synchronization every week

> The synchronization interval is set to "every day" by default. To synchronize manually, click on **Synchronize now**.

To configure the synchronization information

1. Click on the CRM application you want to edit in the menu.
2. Click on **Configure** next to **Synchronization info**.
   ✓ The **Synchronization** page appears.
3. Choose the synchronization interval from the dropdown list.
4. Click on **OK**.
   ✓ Your changes are saved.