

CloudConnect integration with Bitrix24 CRM

Telephony & CRM integration

Integrating Bitrix24 CRM with CloudConnect's Phone system helps to get access to click to call functionality where a call can be launched/originated from the CRM itself. Click on the Call button at the top of contact or just click on the number to initiate a call & connect. This will also display a popup in the corner with customer details.

For incoming calls, a popup will appear on the CRM. If the caller is an existing customer then it will display pop-up with details and with a single click customer profile will be displayed. However, for an unknown caller, a lead can be created right away. If an existing customer/lead is calling from another number then it also facilitates to add to existing contact or lead.

How does CRM & Telephony integration work

When the call is performed - both for incoming & outgoing calls - the system is searching for this phone number in CRM database.

In case if you've specified this number in the client's details ("phone" field), the call will be automatically bound to the found CRM item. You will be able to see the associated CRM record's details in the call window, (contact name, responsible person, current activities) or create a new *Deal or Invoice* - it will be opened in a separate browser window. If you'd like to add some notes to the call, use *Comments* option.

After the call is completed you will be able to see the call details in the *CRM record's Activity Stream*. The call fact will also be recorded under CRM record's *History*.

Salient Features:

Originate Outbound Call from CRM

Notification for Inbound & Outbound calls on CRM

Add Notes & Descriptions to Inbound & Outbound calls on CRM

Customer Details Pop Up for Inbound & Outbound calls on CRM

Create Lead & Contact for incoming calls on CRM

If the number is not found in the CRM - the system automatically creates new leads in this case, or offer the user to create a new CRM record in the call window.

Automatically change Bitrix24 user responsible for the lead when manually forwarding a call - when the call is forwarded to another user - this user is automatically assigned as this lead's responsible user.

Call Details on CRM

Call Recording on CRM with Play & Download option.

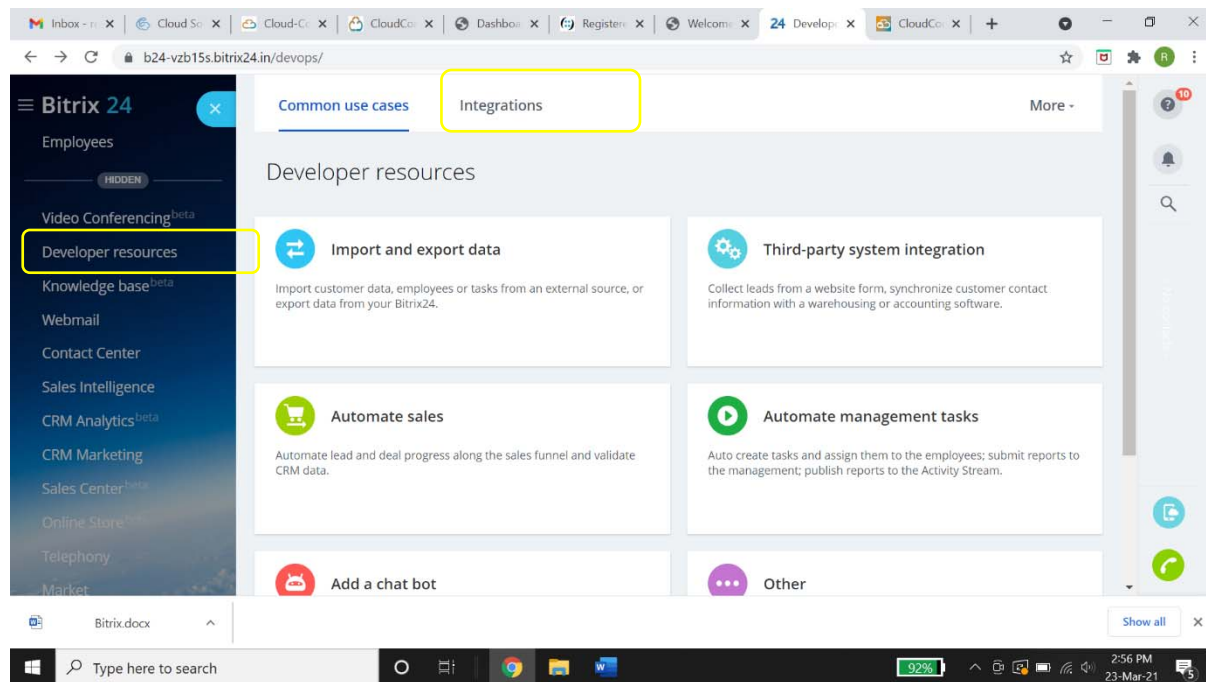
***CloudConnect & Bitrix24 CRM integration is LIVE with both of our solutions, CONTACT CENTER & Cloud PBX.**

Basic Requirements:

1. Bitrix24 CRM administrator account access.
2. Bitrix24 plan to support telephony integration
3. Valid subscription of CloudConnect Solutions, write to us directly on marketing@cloud-connect.in and get yourself registered.

Once you have active CloudConnect and Bitrix24 CRM account, follow these steps to get started:

Login to your Bitrix24 CRM & visit Developer Resources from left pane & then click on Integrations tab.



Items listed on the Integration page, Double click to Edit any item on the page.

ID	USER	NAME	SCOPE	EVENTS	WIDGETS
2		Outbound webhook		External phone call start (ONEXTERNALCALLSTART)	
4		Inbound webhook	Telephony, Telephony (outbound calls), CRM		
6		finish call	Telephony, Telephony (outbound calls), Tasks, Tasks (extended permissions), CRM, Data storage, Lists		
8		Add custom action to CRM information pane	CRM, Application embedding, Telephony, Tasks, Tasks (extended permissions), Contact center, Social Network		CRM_LEAD_LIST_MENU (CRM_LEAD_LIST_MENU), CRM_DEAL_LIST_MENU (CRM_DEAL_LIST_MENU), CRM_CONTACT_DETAIL_ACTIVITY (CRM_CONTACT_DETAIL_ACTIVITY), CRM_DEAL_DETAIL_ACTIVITY, CRM_LEAD_DETAIL_TAB, CRM_CONTACT_DETAIL_TAB, CRM_CONTACT_LIST_MENU, CRM_ACTIVITY_LIST_MENU, CRM_CONTACT_LIST_MENU, CALL_CARD (CALL_CARD), CRM_LEAD_DETAIL_TAB (CRM_LEAD_DETAIL_TAB)

Double click on Outbound Webhook to fill in the details

Create an outbound webhook to obtain information about events occurring in your Bitrix24.

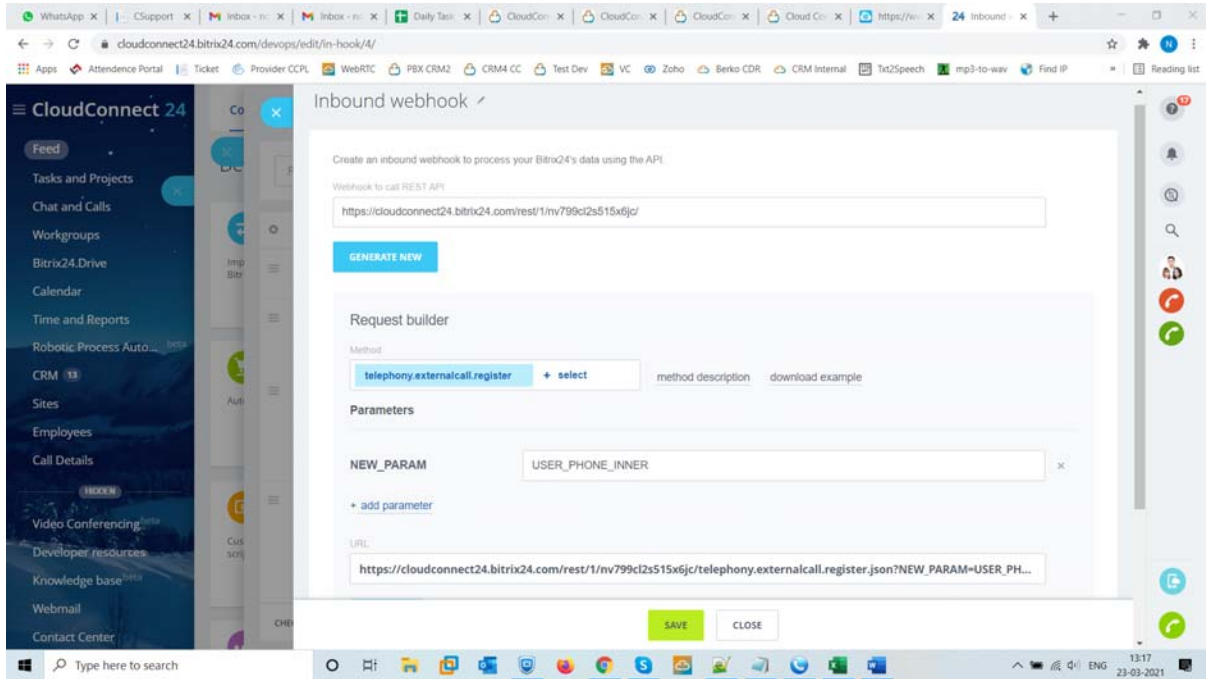
Outbound webhook

Your handler URL:

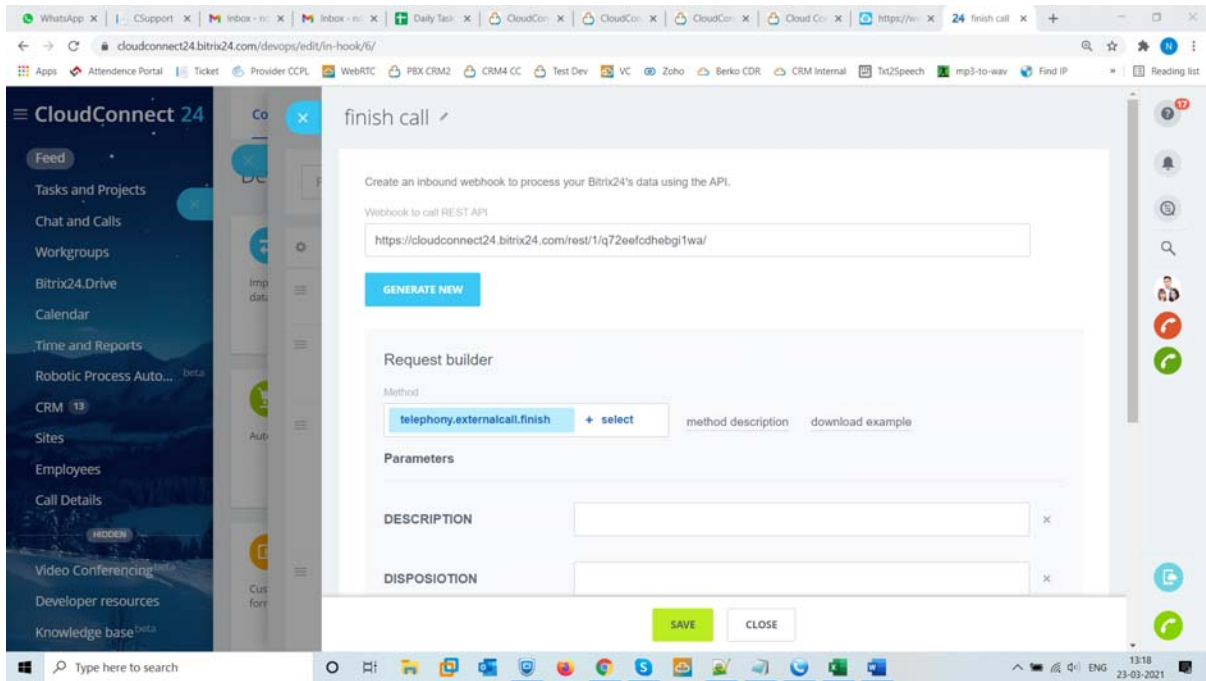
Application token:

Events:

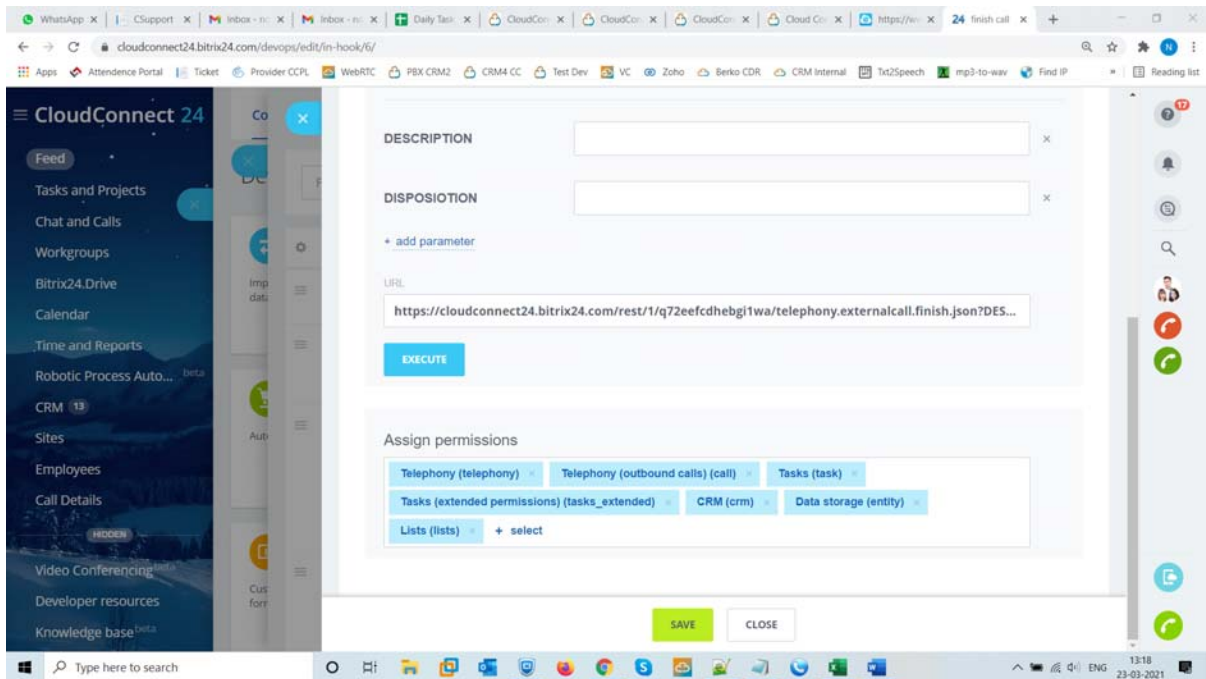
Double click on Inbound Webhook to fill in the details



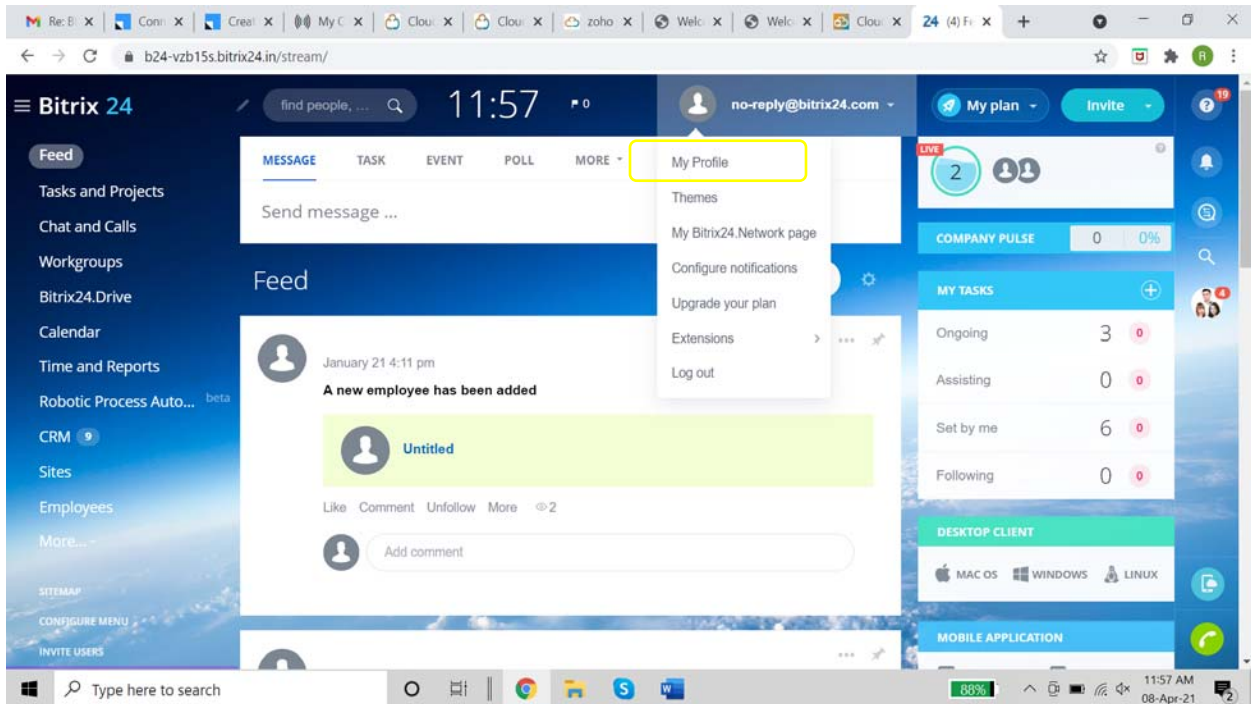
Double click on Finish Call option to fill in the details



It is required to Assign Permissions for the suggested items & save the changes in the Finish Call.



Now, Click on My Profile to update Extension Number:



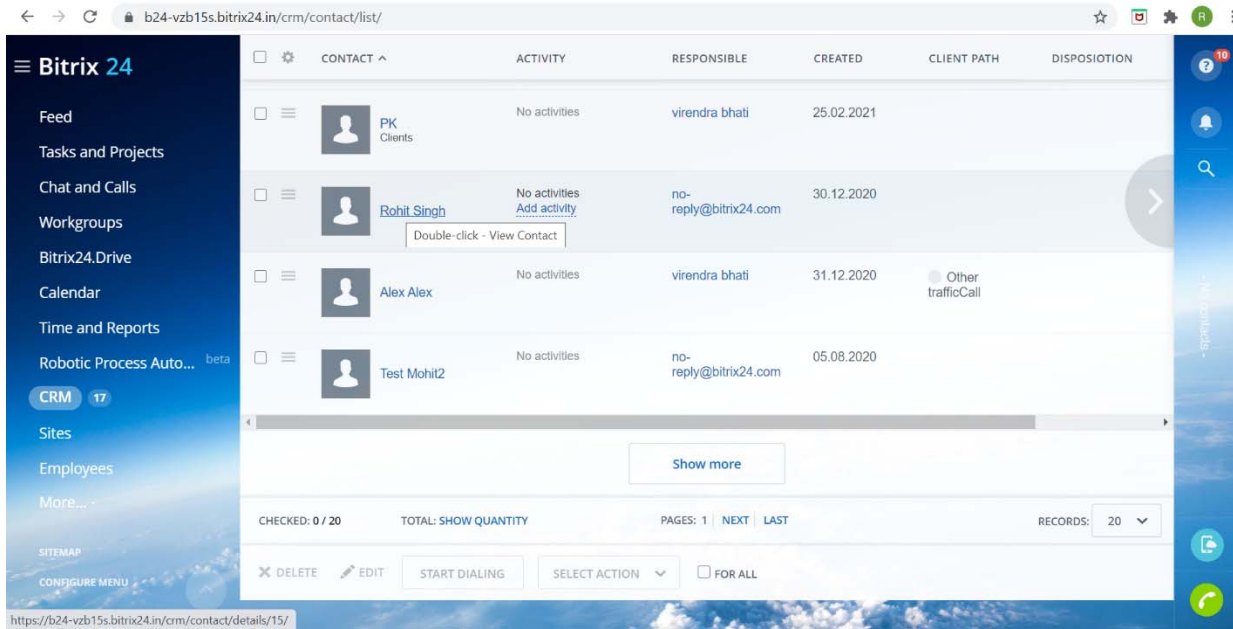
Update Extension Number by selecting Configure

The screenshot shows the Bitrix24 user profile page. The left sidebar contains navigation options like Feed, Tasks and Projects, Chat and Calls, Workgroups, Bitrix24.Drive, Calendar, Time and Reports, Robotic Process Auto..., CRM, Sites, Employees, and More... The main content area includes a stress level meter, an 'Appreciations' section with various icons, and an 'About me' section with a 'TELL ABOUT YOURSELF' button. On the right, the user profile information is displayed, including contact email (no-reply@bitrix24.com), department (Bitrix), second name (field is empty), mobile phone (+917827966683), and extension number (550). A dropdown menu is open over the extension number field, showing options: 'Hide', 'Configure', and 'Show always' (checked). The Windows taskbar at the bottom shows the search bar, task view, and system tray with a 37% battery level and the date 08-Apr-21.

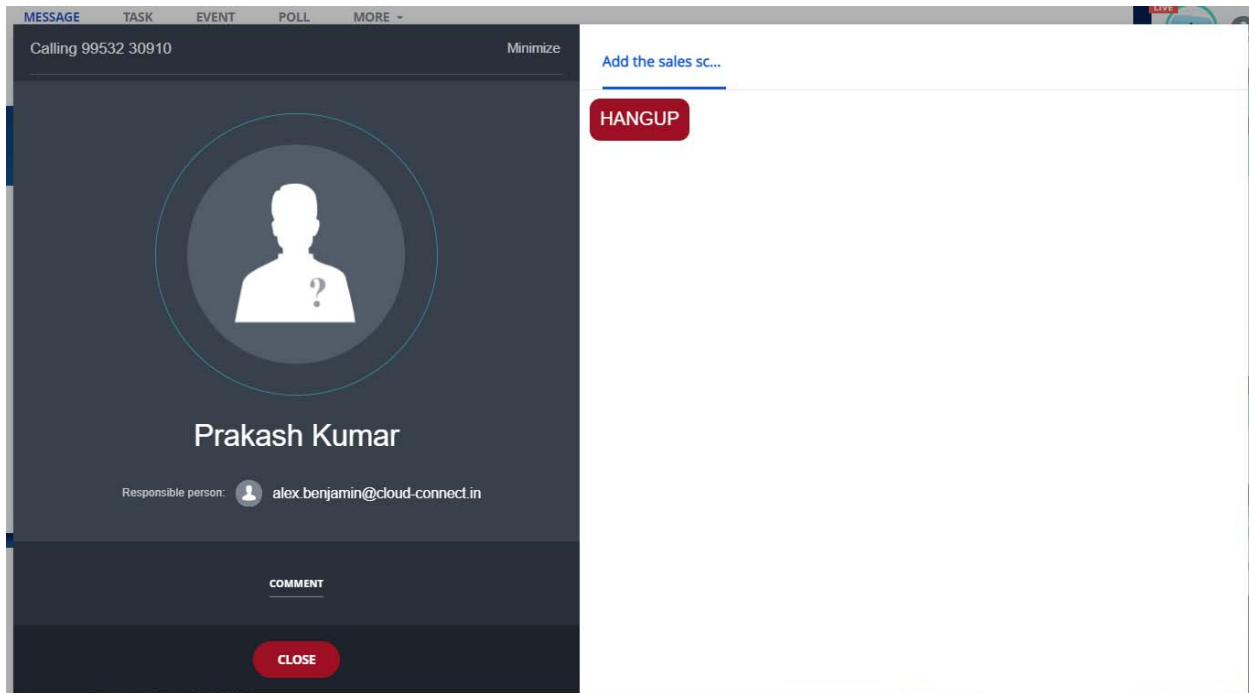
Click Save

This screenshot shows the same Bitrix24 user profile page as the previous one, but with the extension number field updated to '550' and the 'Configure' dropdown menu closed. At the bottom of the profile information section, there are two buttons: 'SAVE' (highlighted in green) and 'CANCEL'. The rest of the page layout, including the sidebar and main content area, remains the same.

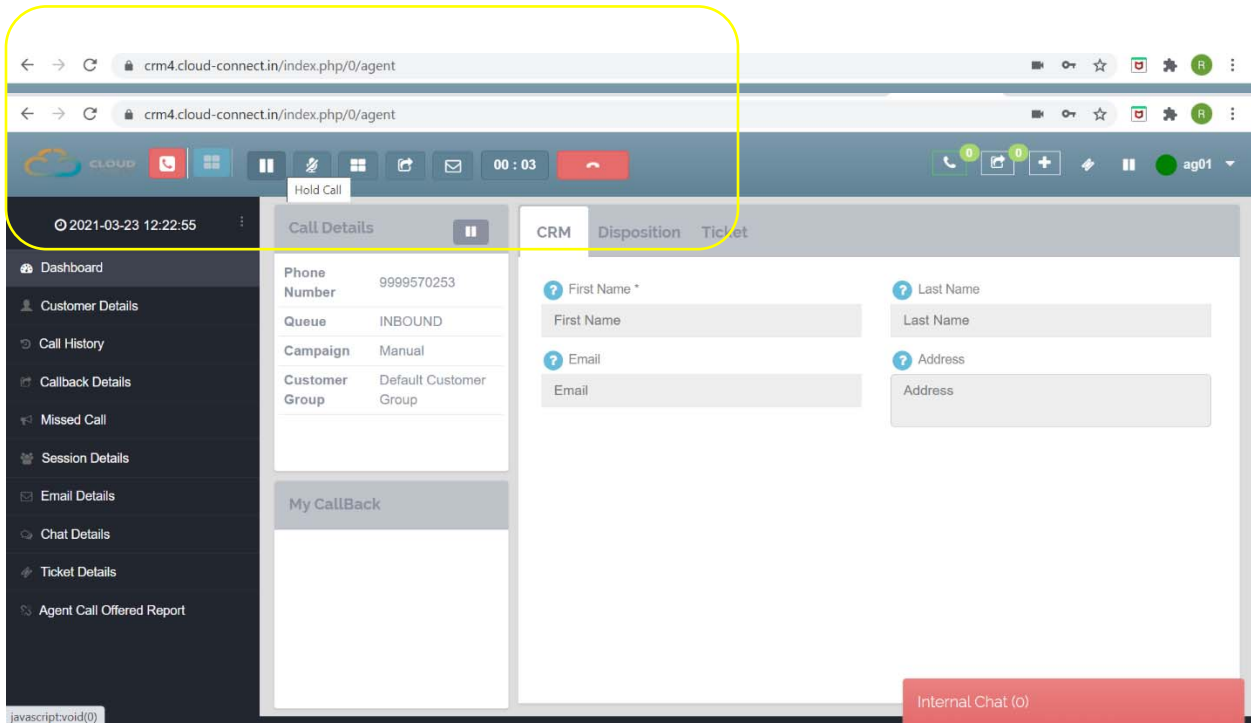
Outgoing Calls: click on the Lead/Contacts to initiate Outgoing call



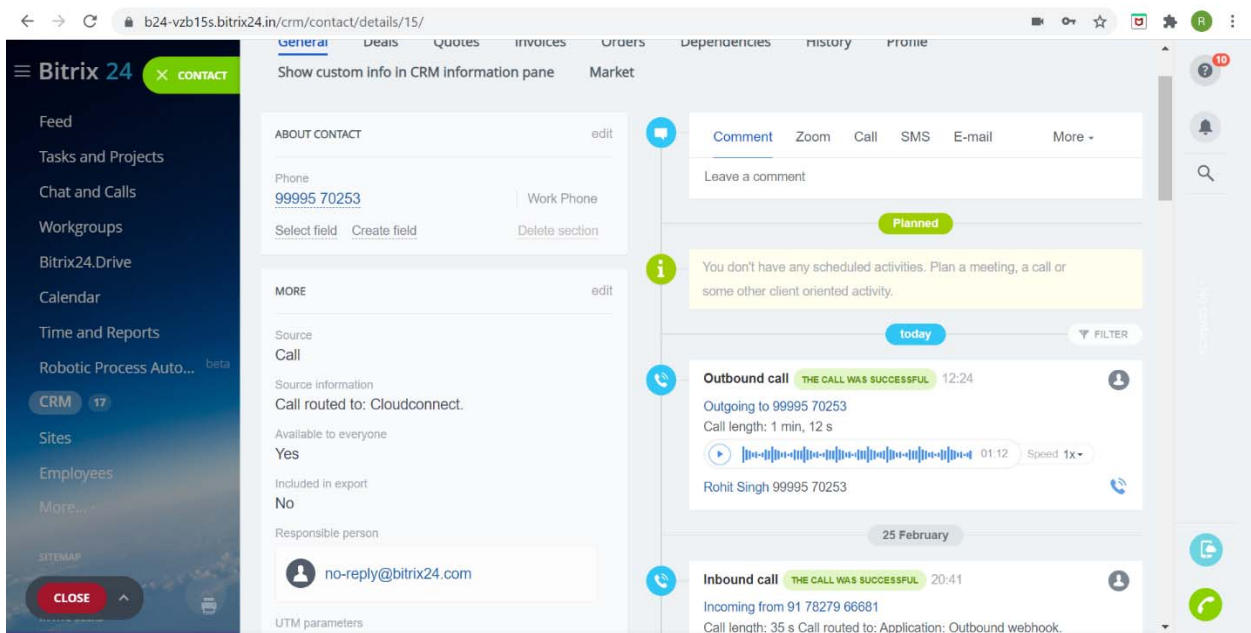
A popup will open with the details of the caller



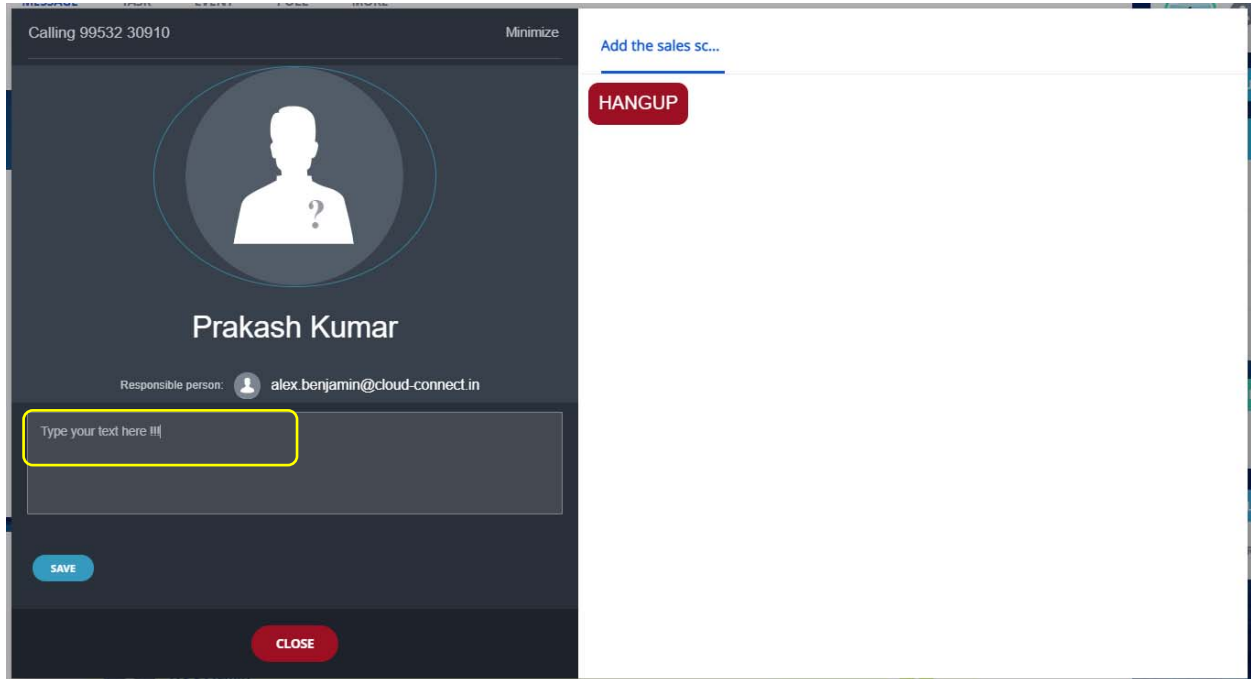
A call would come on CloudConnect's panel (Contact Center or PBX)



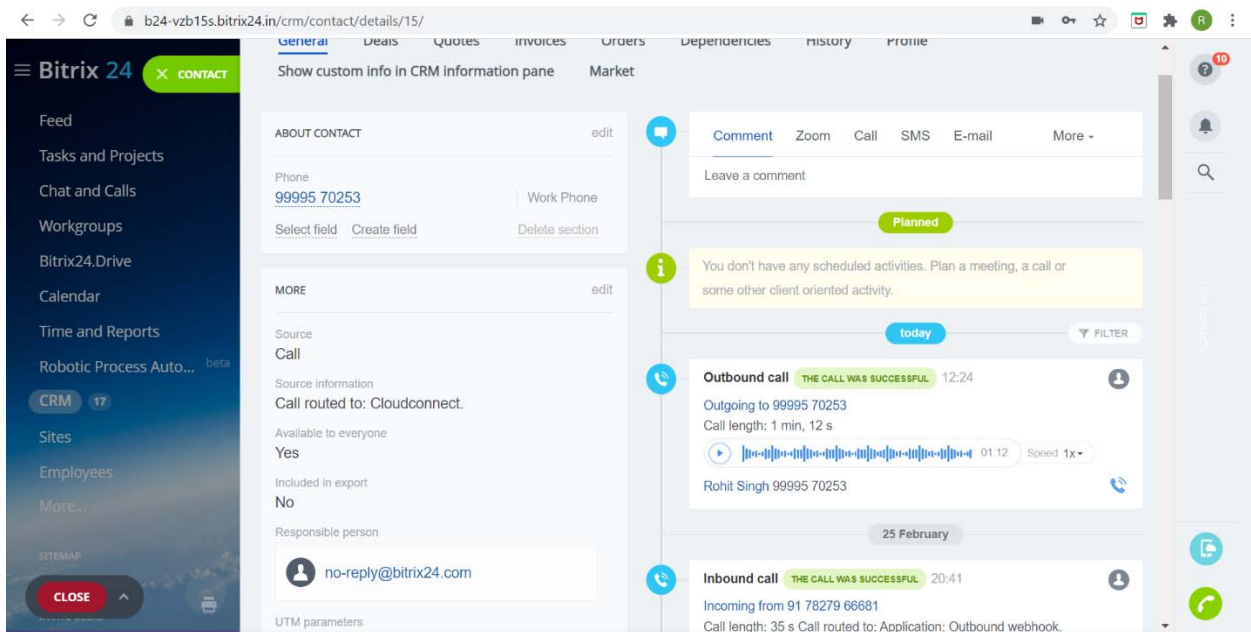
Once the agent receives the call on the CloudConnect's panel (Contact Center or PBX), then another leg of the call will go to the end user. Agent on the call will be able to access the customer details from the popup on Bitrix24 CRM.



Agent can also put their comments on the call as part of Dispositions which will be available on the CRM for reference.



Once the call ends, agent will have access to Comments History & other details of Outgoing Call including Call Recordings.



Agent can select any of the call records & Call Recording can be accessed or downloaded.

The screenshot displays the Bitrix24 CRM interface for a call record. The browser address bar shows the URL: `b24-vzb15s.bitrix24.in/crm/lead/details/49/`. The main header of the call record includes a close button, a call icon, the number "Outgoing to 91 93054 66266", and status indicators for "Completed", "Important", and "More".

The call details section shows the following information:

- Date and time: 05.04.2021 17:00 - 05.04.2021 17:00
- Call type: Outbound call
- Duration: 19 s
- Description: Call length: 19 s

A call recording player is visible, featuring a play button, a progress bar, and a "download call recording" link. The recording is associated with the contact "919305466266 - Outgoing c..." and has a phone number of "91 93054 66266".

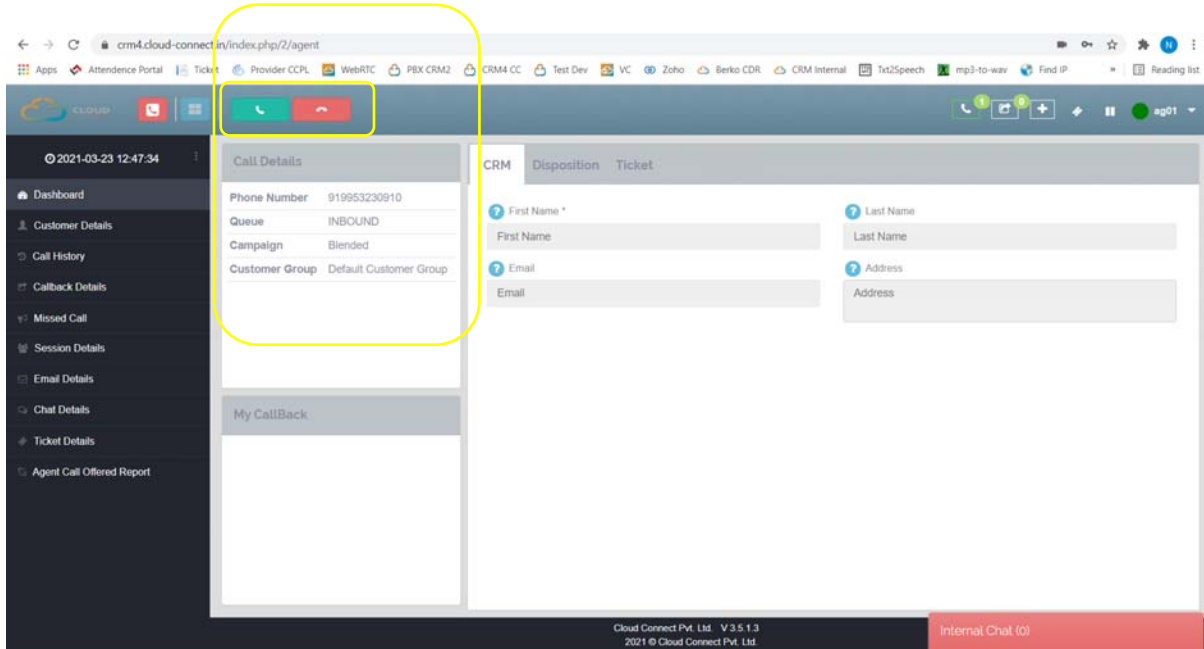
The "Files" section at the bottom lists the recording file: "1 2021-04-05 14-30-07 919305466266.wav". Below this list are "EDIT" and "CLOSE" buttons.

The left sidebar contains the Bitrix24 navigation menu with options such as Feed, Tasks and Projects, Chat and Calls, Workgroups, Bitrix24 Drive, Calendar, Time and Reports, Robotic Process Auto..., CRM (9), Sites, Employees, and More. The right sidebar shows notification and communication icons.

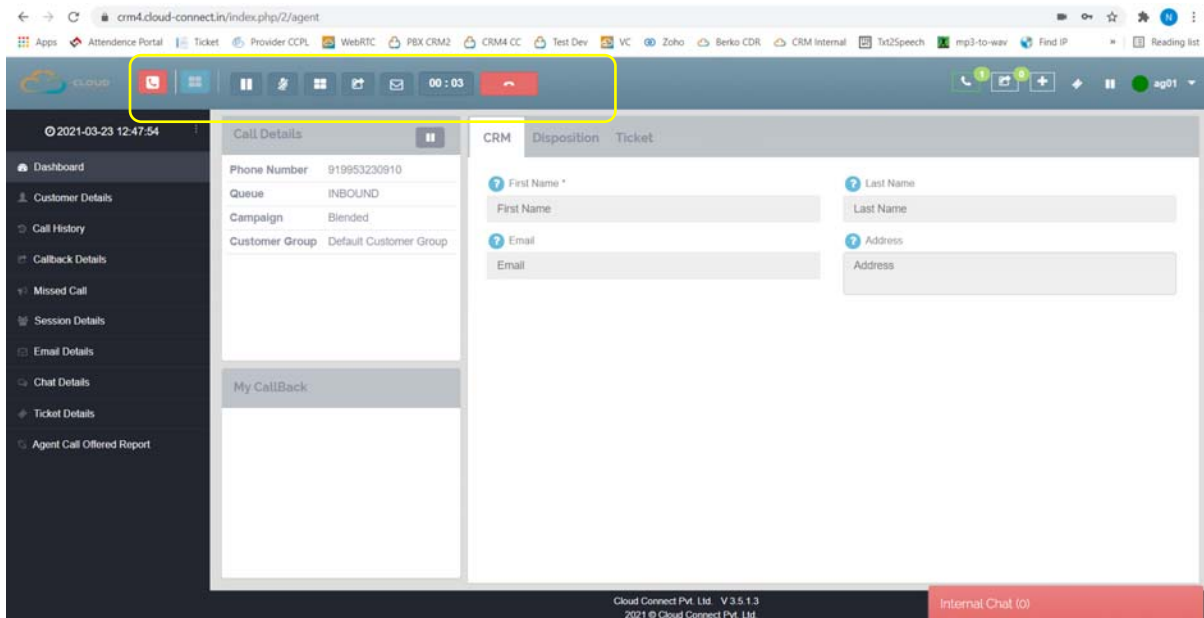
Incoming Calls:

When the account/extension receives an **incoming call** in CloudConnect panel, an automated popup is also shown in Bitrix24 CRM.

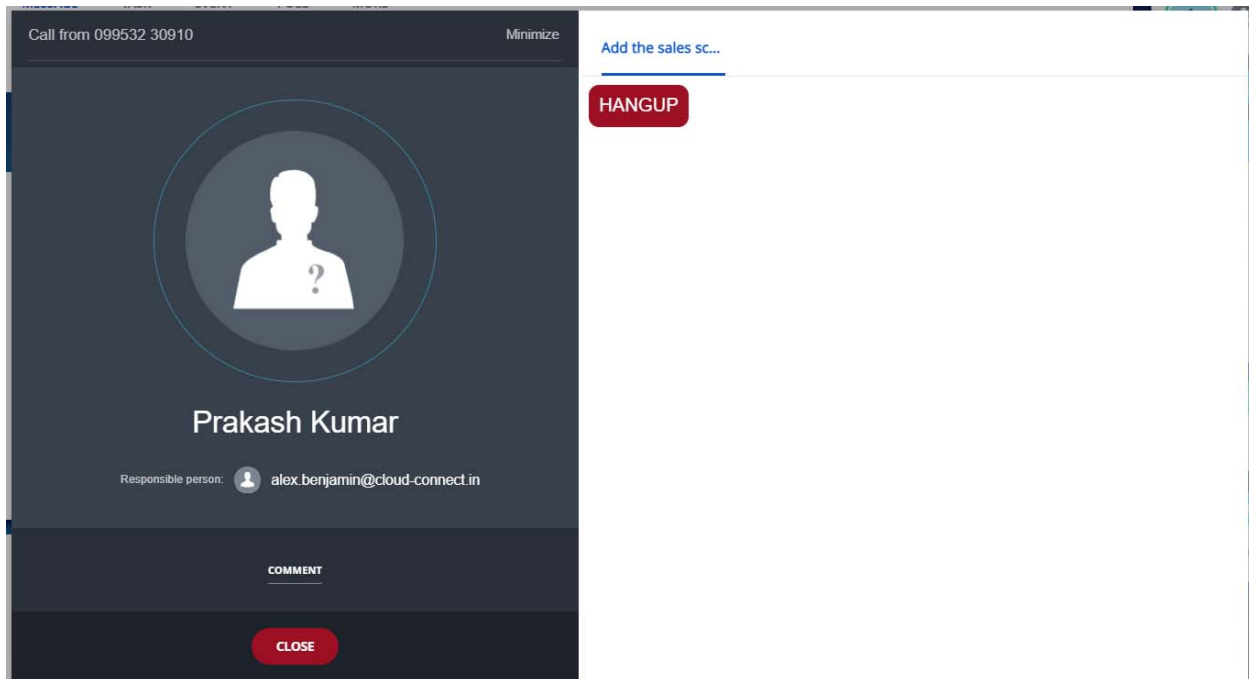
Incoming call in CloudConnect panel



Agent receives the Incoming call

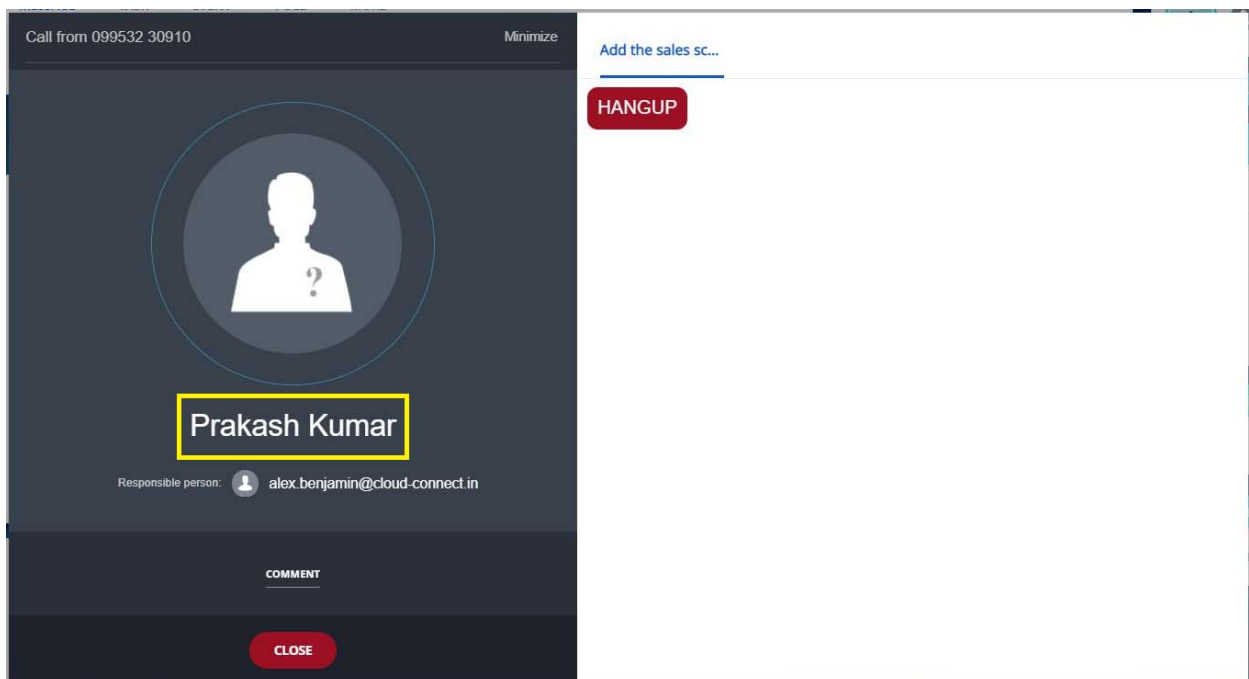


Automated popup is shown in Bitrix24 CRM.



Once the call is answered, agents will have an option to view the details of caller on Bitrix24 CRM in case of an existing customer.

Click on the Name of the Caller to view details

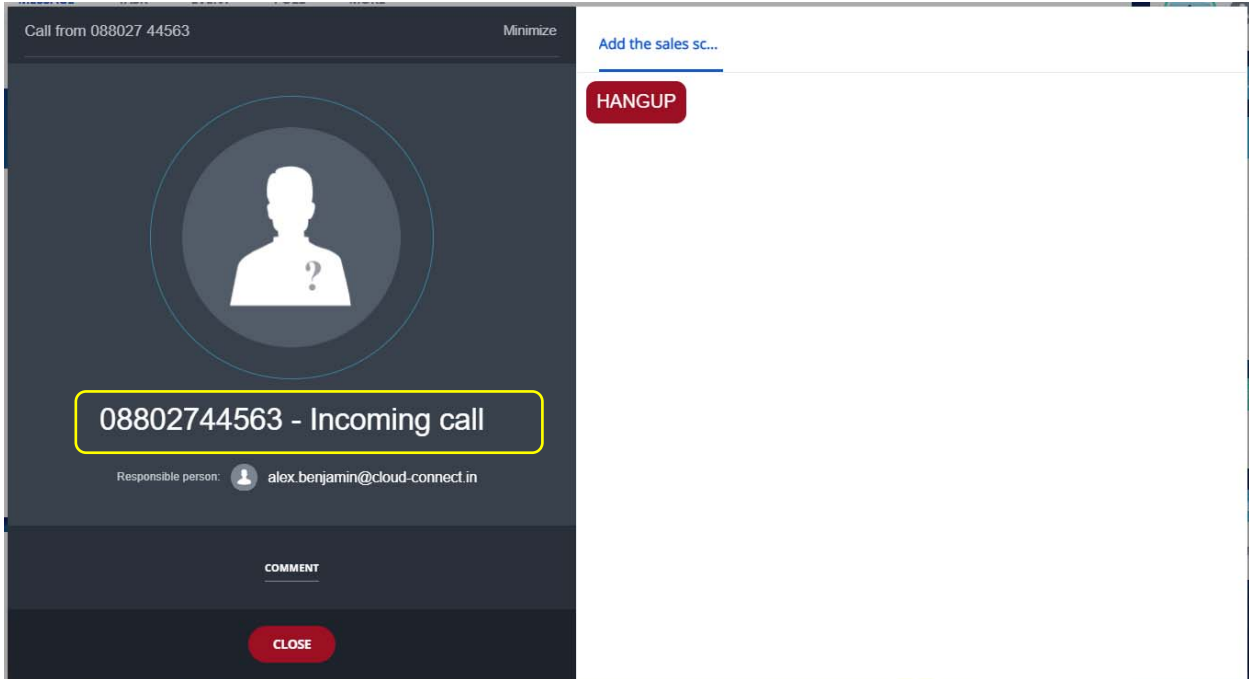


Details of the caller

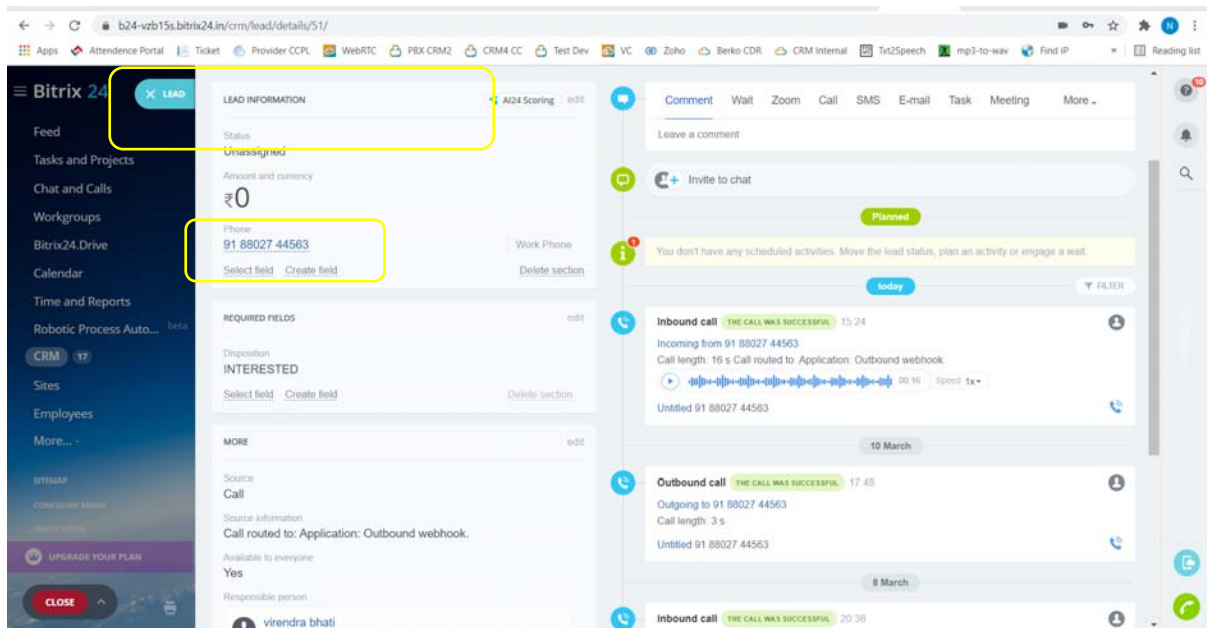
The screenshot shows the Bitrix24 CRM interface for a contact named 'PK'. The left sidebar contains navigation options like 'Feed', 'Tasks and Projects', 'Chat and Calls', 'Workgroups', 'Bitrix24 Drive', 'Calendar', 'Time and Reports', 'Robotic Process Auto...', 'CRM 17', 'Sites', 'Employees', and 'More...'. The main content area is divided into sections: 'ABOUT CONTACT' (Salutation: Mr., Phone: 91 99532 30910), 'MORE' (Contact type: Clients, Source: Call, Available to everyone: Yes, Included in export: Yes, Responsible person: virendra bhati), and 'PRODUCTS' (Total: ₹0). A right-hand panel shows a 'Comment' section with a 'Planned' status and a list of call logs. The call logs include an 'Outbound call' on 25 February (12:44) and a 'Contact created' event on 18:17. The browser address bar shows 'b24-vzb15s.bitrix24.in/crm/contact/details/47/'.

The screenshot shows the Bitrix24 CRM interface for a deal with ID '91 99532 30910'. The left sidebar is similar to the contact page. The main content area shows 'ABOUT DEAL' (Deal type: Sales, Source: Call, Source information: Call routed to: TEST_CPBX, Start date: 7 August 2020, Available to everyone: Yes, Responsible: no-reply@bitrix24.com, UTM parameters: None) and 'PRODUCTS' (Total: ₹0). The right-hand panel displays a list of call logs. The call logs include an 'Inbound call' on 15:16 (Call length: 16 s), an 'Inbound call' on 9 March (14:48, Call length: 10 s), an 'Inbound call' on 14:37 (Call length: 14 s), and an 'Inbound call' on 14:13 (Call length: 14 s). The browser address bar shows 'b24-vzb15s.bitrix24.in/crm/deal/details/7/'.

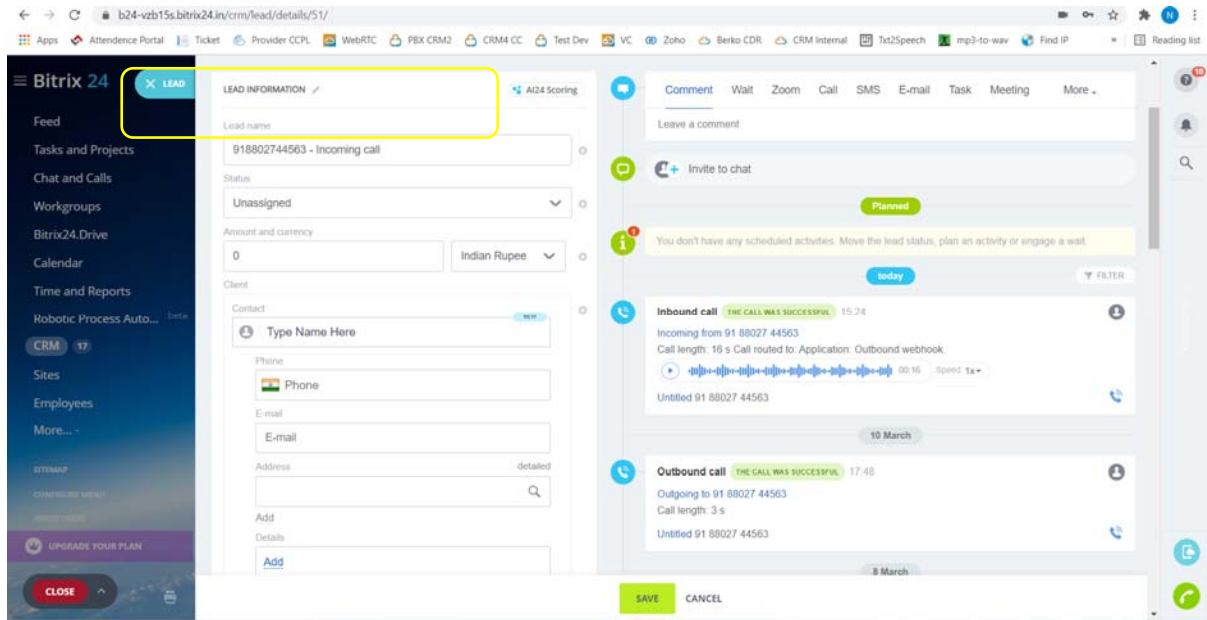
It also facilitates to create a lead for Incoming calls. Agent when receives an incoming call from the unknown caller in CloudConnect panel, an automated popup will be displayed in Bitrix24 CRM & it has an option to take details from caller & create that as lead.



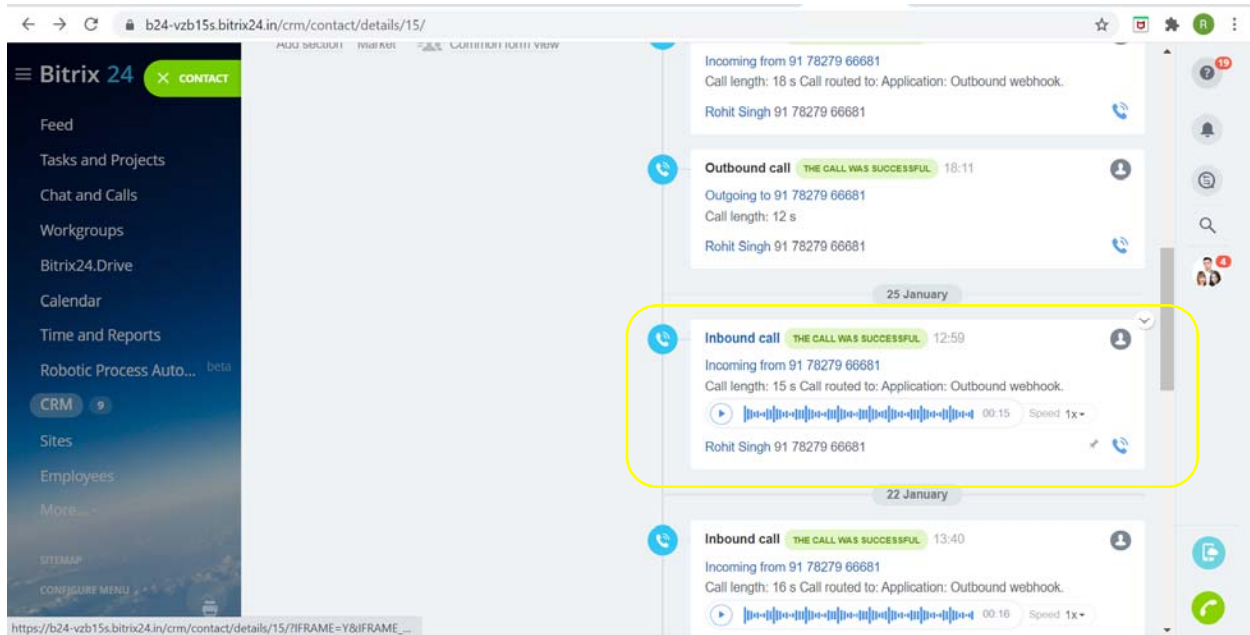
Once the agent answers the calls from unknown caller, agent is required to click on the number to fill out the details to create a lead.



On Clicking on the number, Lead form will be displayed where agent can fill in the caller details & save in the records.



Once the call ends, agent will have access to Comments History & other details of Incoming Call including Call Recordings.



Agent can select any of the call records & Call Recording can be accessed or downloaded.

The screenshot displays the Bitrix 24 CRM interface. On the left is a dark sidebar with navigation options: Feed, Tasks and Projects, Chat and Calls, Workgroups, Bitrix24.Drive, Calendar, Time and Reports, Robotic Process Auto... (beta), CRM (9), Sites, Employees, and More... At the bottom of the sidebar are links for SITEMAP, CONFIGURE MENU, and INVITE USERS. The main content area shows a call record titled "Incoming from 91 78279 66681". The call status is "Completed" and "Important". The date and time range is "25.01.2021 12:59 - 25.01.2021 13:00". A yellow box highlights the call recording player, which includes a play button, a progress bar at -0:04, and a "download call recording" link. Below the player, the call details are listed: "Call type: Incoming call", "Duration: 15 s", and "Description: Call length: 15 s, Call routed to: Application: Outbound webhook." The contact information is shown as "With: Untitled" and "Phone: 91 78279 66681". At the bottom of the call record, there are "Files:" and "EDIT" and "CLOSE" buttons. The browser address bar shows "b24-vzb15s.bitrix24.in/crm/contact/details/15/".

=====

=====