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@cloudconnect.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.



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

Double click on Outbound Webhook to fill in the details

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Double click on Inbound Webhook to fill in the details

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Double click on Finish Call option to fill in the details

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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:

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Update Extension Number by selecting Configure

Click Save



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

A popup will open with the details of the caller

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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.

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

Calling 99532 30910	Minimize	Add the sales sc
?		HANGUP
Prakash Kumar		
Responsible person: 🚺 alex benjamin@cloud-connect.in		
Type your text here III		
SAVE		
CLOSE		

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

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

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

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Agent receives the Incoming call

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Automated popup is shown in Bitrix24 CRM.

Call from 099532 30910	Minimize	Add the sales sc
		HANGUP
Prakash Kumar		
Responsible person: (1) alex benjamin@cloud-connect.in		
COMMENT		
CLOSE		

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

Call from 099532 30910	Minimize	Add the sales sc
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Details of the caller

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	Responsible person	6	Contact created 18:17	0
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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.

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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.

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