

CLOUDCONNECT integration with LEADSQUARED CRM

CloudConnect's telephony offers seamless integration with LeadSquared CRM & brings work flow automation in the system. The telephony adds click to call feature that helps to place calls from within LeadSquared CRM by clicking on any phone number thus saves time and improves call efficiency.

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

Features and Benefits

1. Click to Call offers the ability to accept incoming calls or make outgoing calls with a single click to increase efficiency.
2. Integrated pop ups provide quick access to existing customer records for incoming & outgoing calls. 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.
3. Detailed Caller ID & Call History provides access to the Call Detail Records & Logs.
4. Access call recordings of inbound and outbound calls. It provides a unified platform to manage the recording of calls and also the quality-of-service delivery.
5. Telephony integration brings quantifiable call data that enables to measure key KPIs
6. Reports & Analytics on the platform to help increase productivity & deliver meaningful customer experiences.
7. Integrated Platform empowers service agents to deliver personalized customer service & also eliminates the need to toggle between multiple applications during calls.

It originates a call from LeadSquared CRM & display a pop up as notification for incoming or outgoing calls with caller information. A green color call button appears beside contact numbers which can be clicked/dialed 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.

It also facilitates to add contacts, add notes/details & also generate analytics for call details.

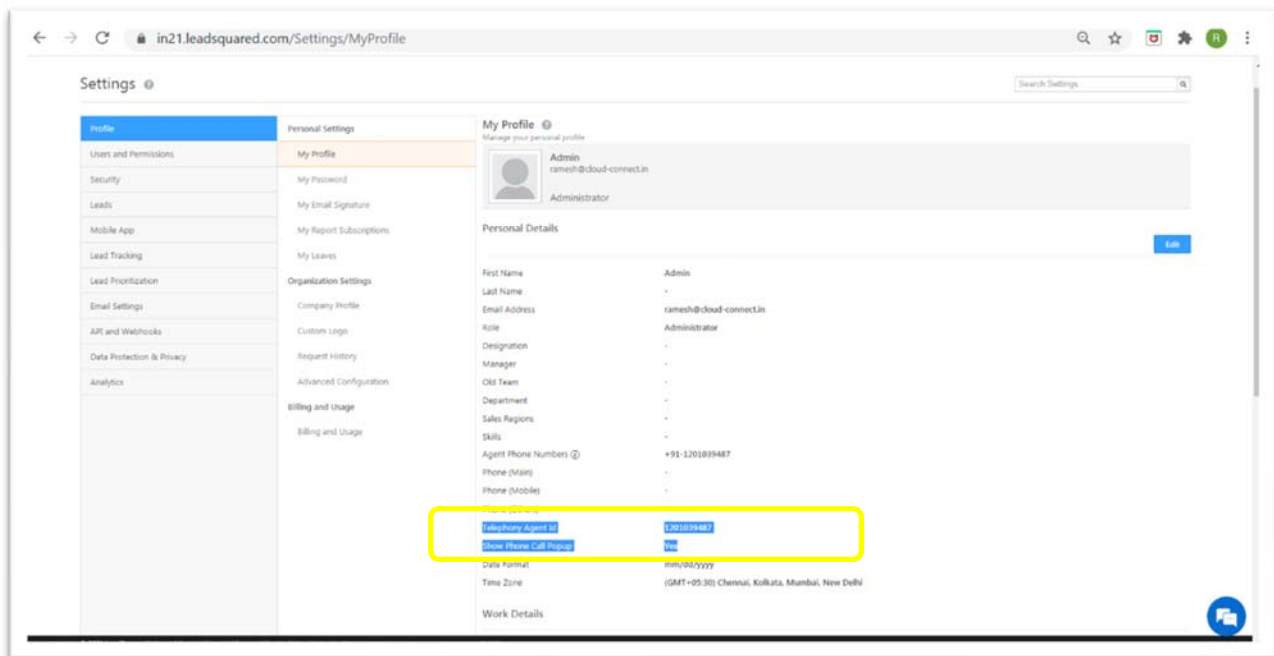
Basic Requirements:

1. LeadSquared CRM administrator account access.
2. LeadSquared 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 LeadSquared CRM account, follow these steps to get started:

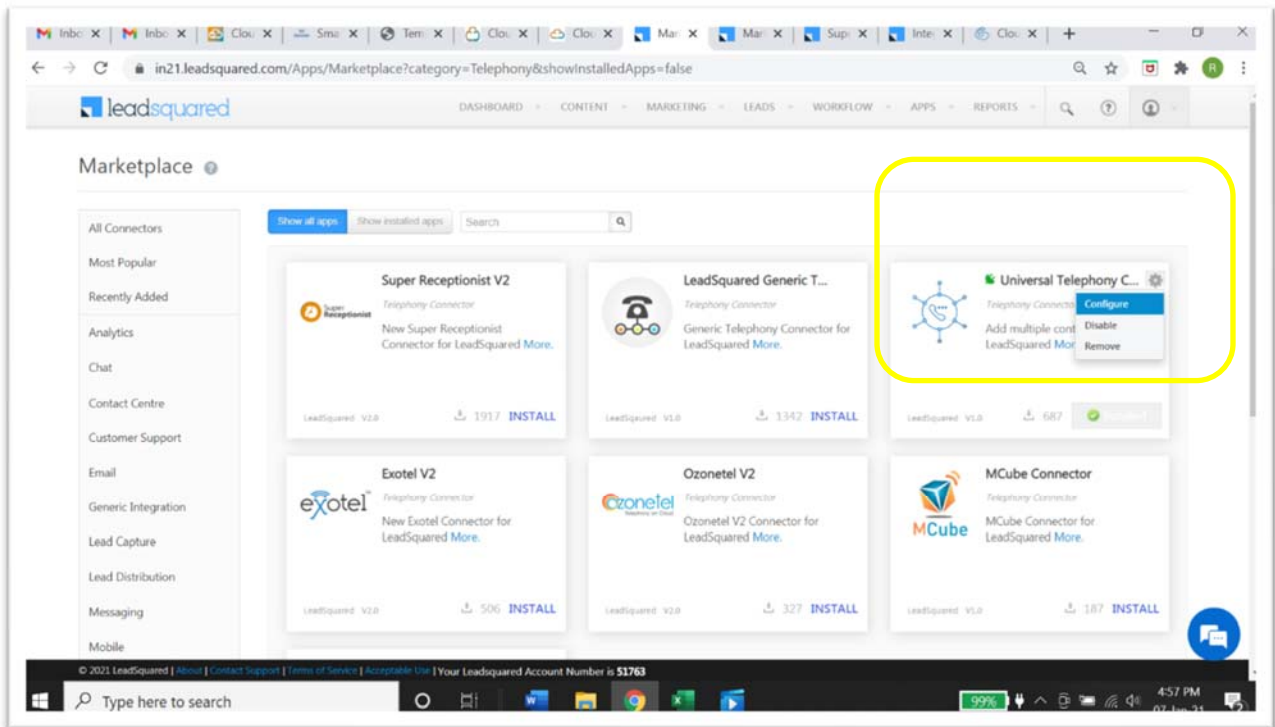
Login to your LeadSquared CRM & visit profile

- Go to [My Accounts > Settings > Profile](#)
- Mention Admin DID as the “Telephony Agent Id”
- Option “Show Phone Call Popup” to be marked as ‘Yes’
- Mention “Agent Phone Numbers”

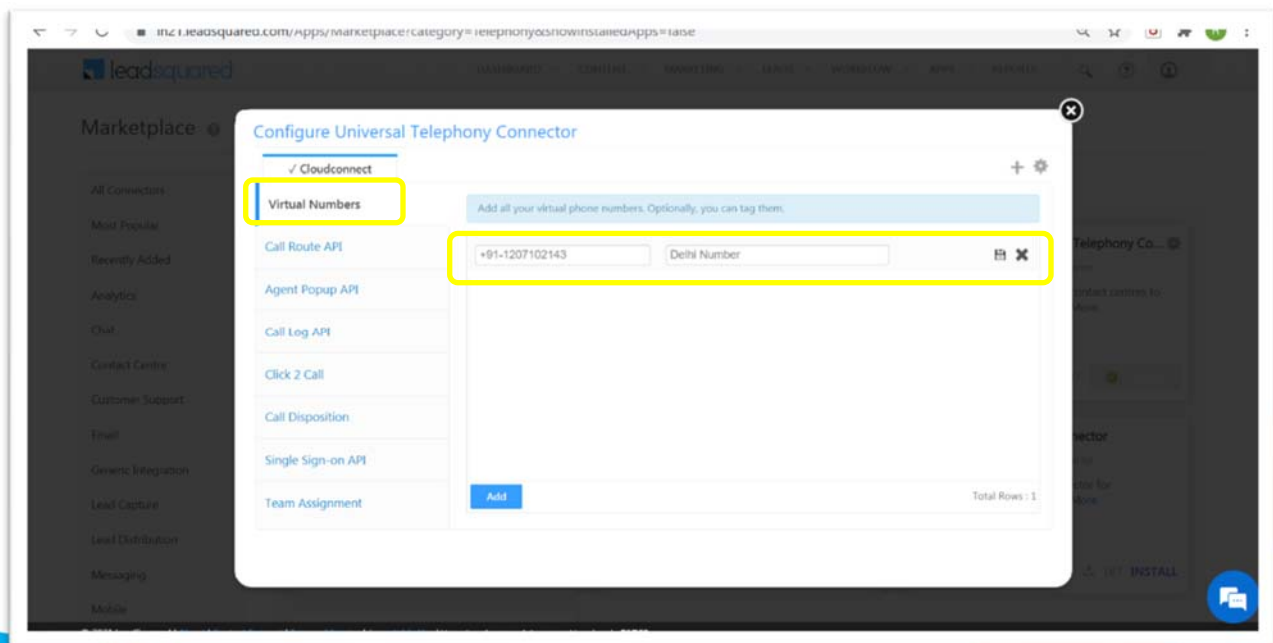


Refer the link to find these details; Go to Apps > Apps Marketplace > Telephony > Universal Telephony Connector > click **Install** & follow simple to complete installations.

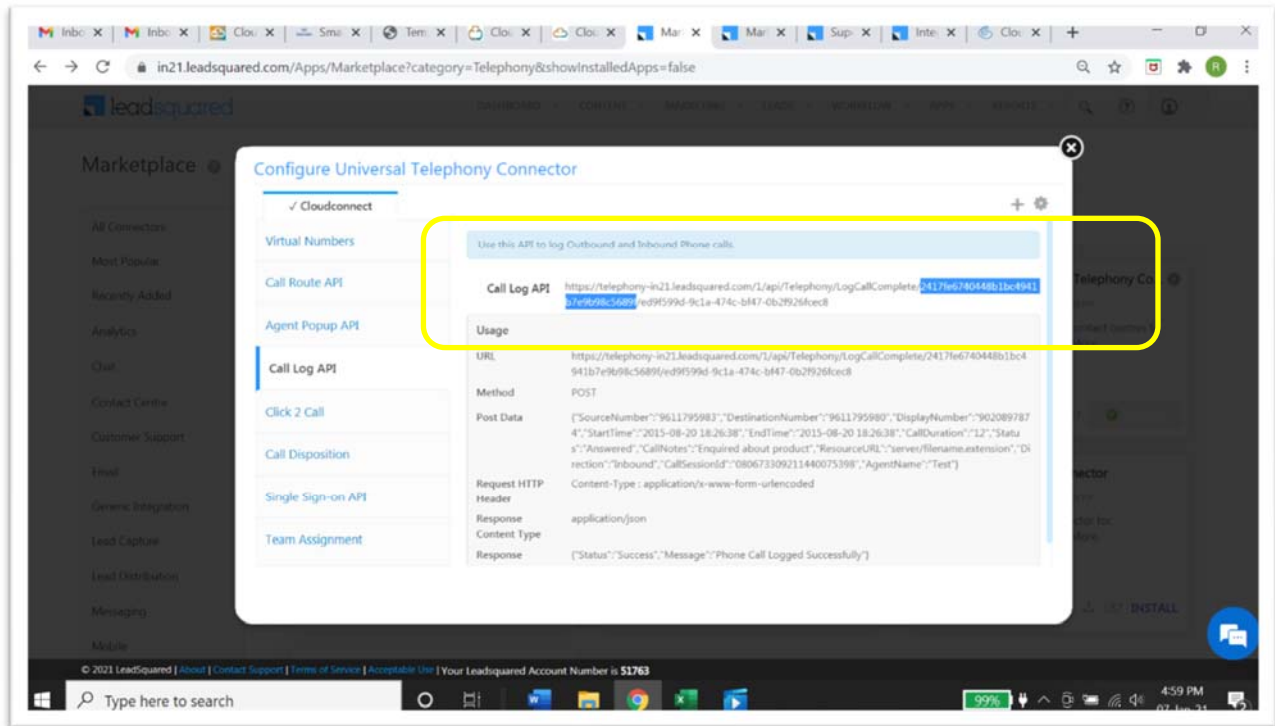
After the installation, Click **Configure**



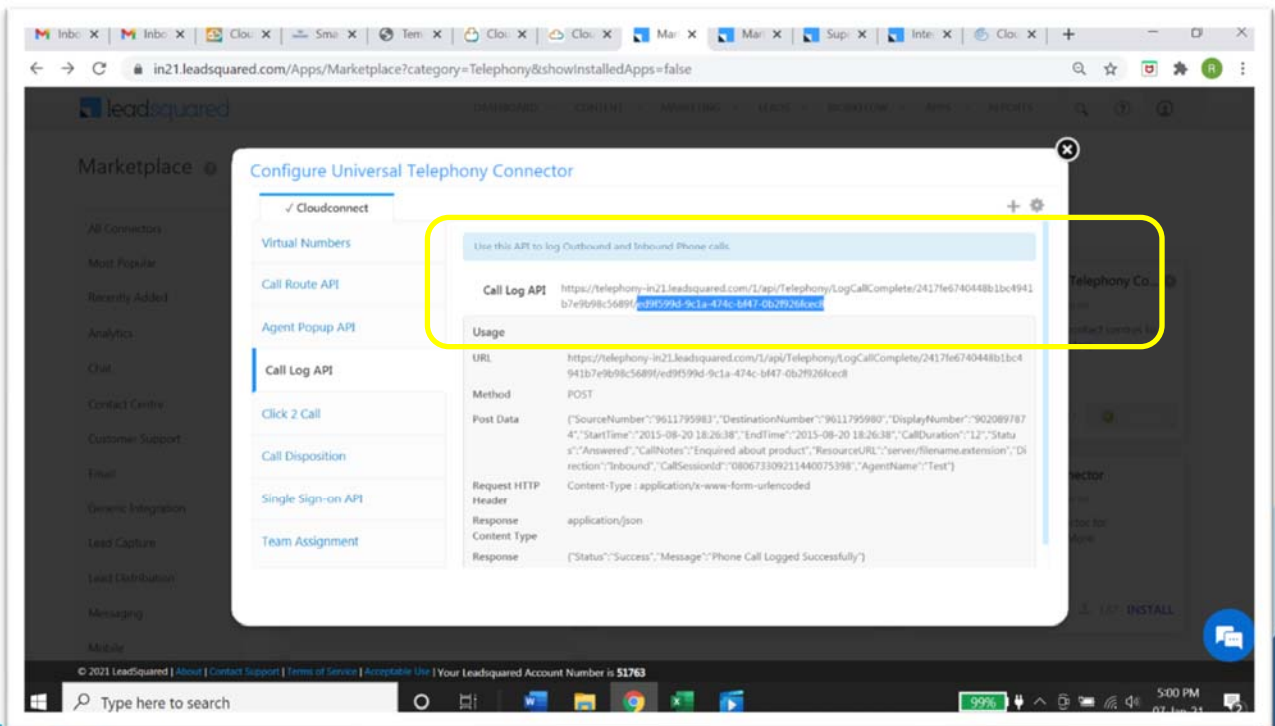
First thing that needs to be configured is the Virtual Numbers. Multiple Virtual Numbers can also be configured



Select Configure > Go to **Call Log API**. You will find Access key & Secret Key in the API URL. The part highlighted in Blue color is the 'Access Key'

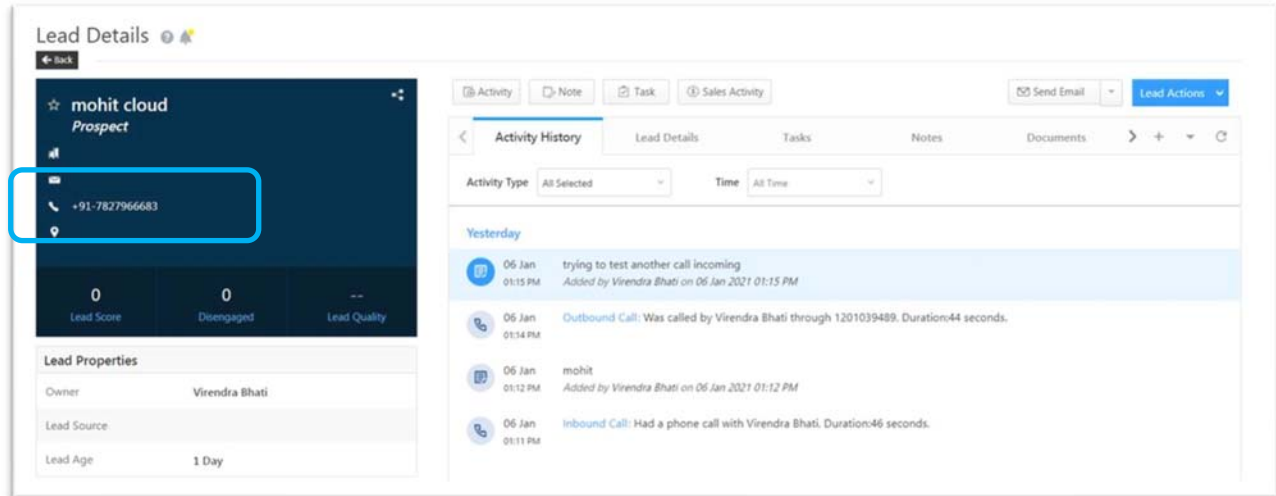


The other highlighted in Blue color is the 'Secret Key'



Once the provisioning of accounts is done, the mapped account/agent can use telephony in their LeadSquared CRM.

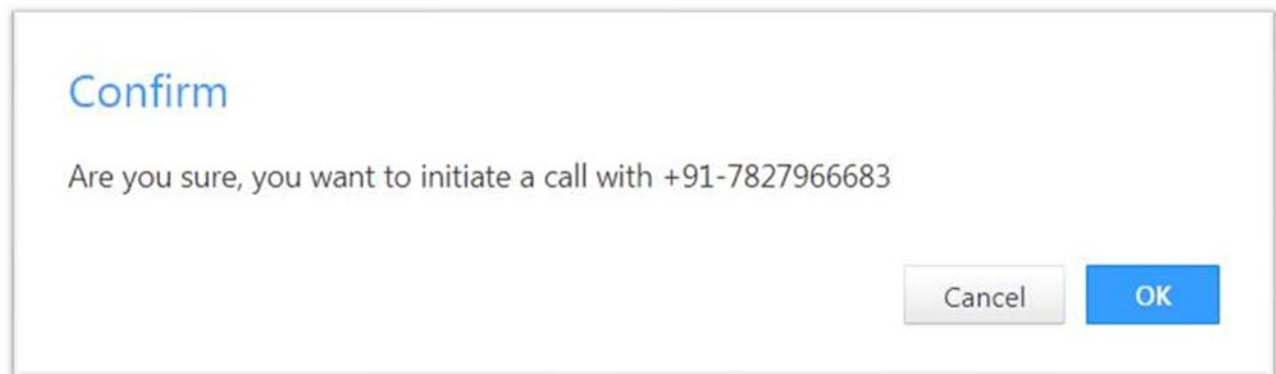
Outgoing Calls: click on the lead contacts to initiate Outgoing call



The screenshot shows the 'Lead Details' page for a prospect named 'mohit cloud'. The phone number '+91-7827966683' is highlighted with a blue box. The 'Activity History' section shows a list of activities:

Activity Type	Time	Activity
Activity	06 Jan 01:15 PM	trying to test another call incoming <i>Added by Virendra Bhati on 06 Jan 2021 01:15 PM</i>
Outbound Call	06 Jan 01:14 PM	Outbound Call: Was called by Virendra Bhati through 1201039489. Duration:44 seconds.
Activity	06 Jan 01:12 PM	mohit <i>Added by Virendra Bhati on 06 Jan 2021 01:12 PM</i>
Inbound Call	06 Jan 01:11 PM	Inbound Call: Had a phone call with Virendra Bhati. Duration:46 seconds.

It will ask to reconfirm to initiate outgoing calls

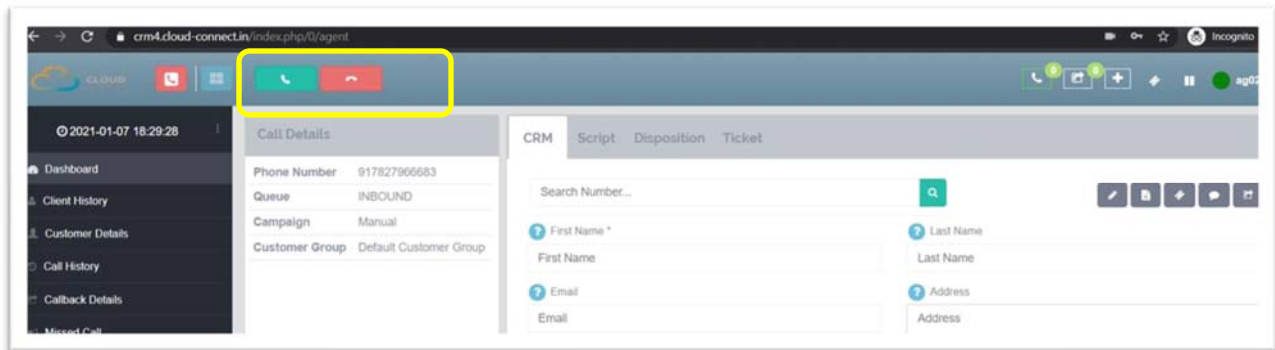


Confirm

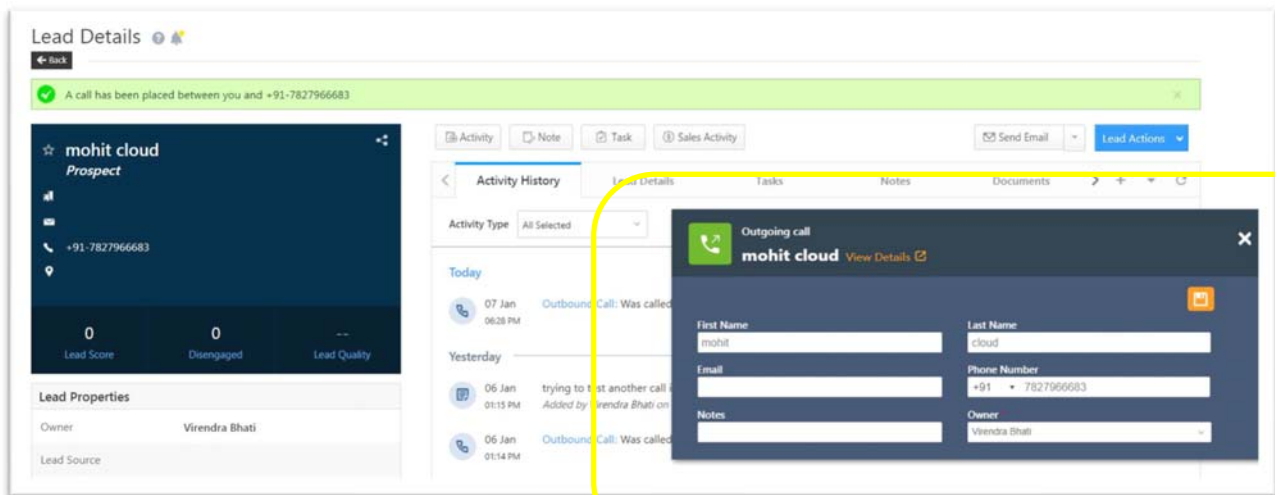
Are you sure, you want to initiate a call with +91-7827966683

Cancel OK

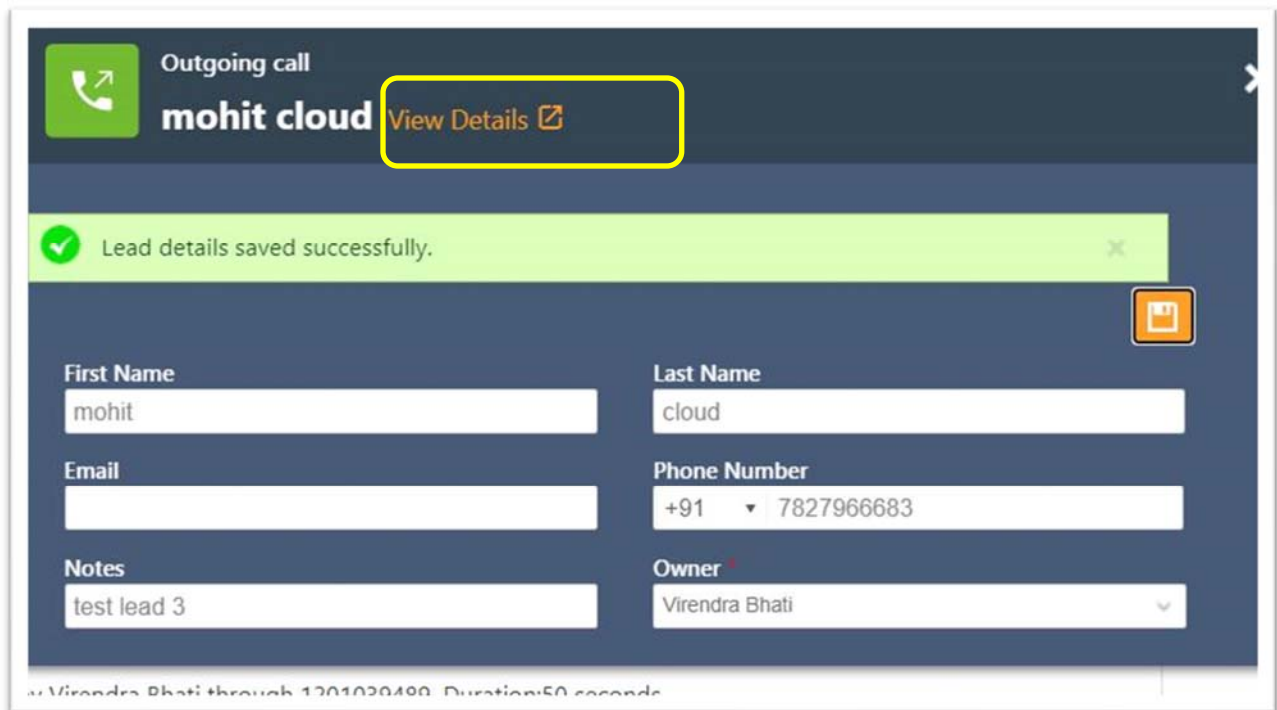
On confirmation, a call would come on CloudConnect's panel (Contact Center or PBX)



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 & an outgoing Pop-up will appear on LeadSquared CRM with end user details.



It also facilitates to create a lead for Outgoing Calls.



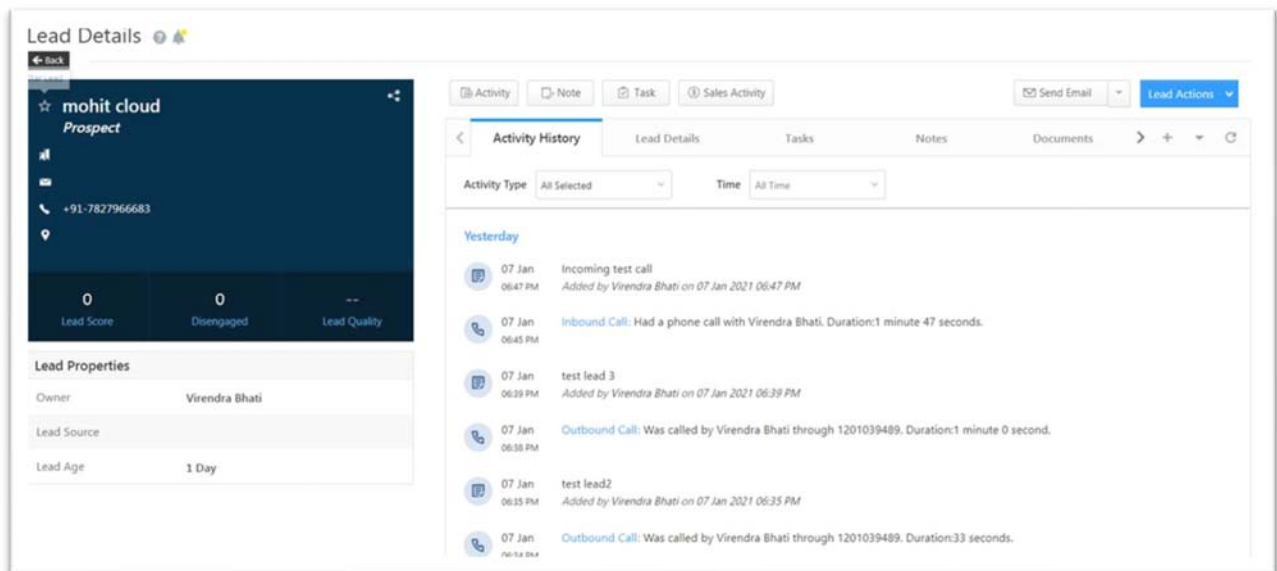
Outgoing call
mohit cloud [View Details](#)

Lead details saved successfully.

First Name: mohit
Last Name: cloud
Email:
Phone Number: +91 7827966683
Notes: test lead 3
Owner: Virendra Bhati

Virendra Bhati through 1201039489. Duration:50 seconds

On clicking 'View Details', Lead details would be displayed



Lead Details

mohit cloud
Prospect
+91-7827966683

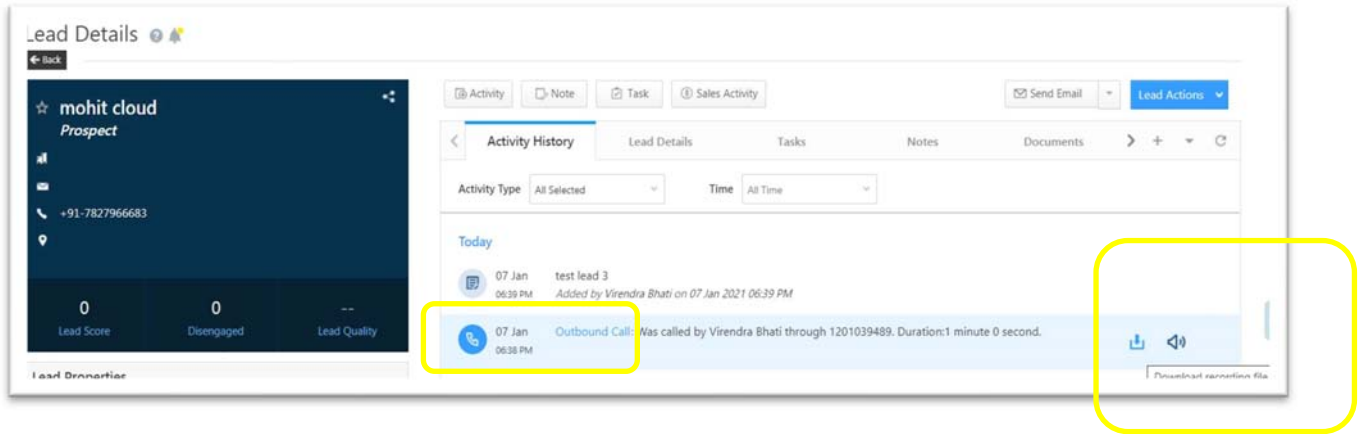
Lead Score: 0 | Disengaged: 0 | Lead Quality: --

Lead Properties
Owner: Virendra Bhati
Lead Source:
Lead Age: 1 Day

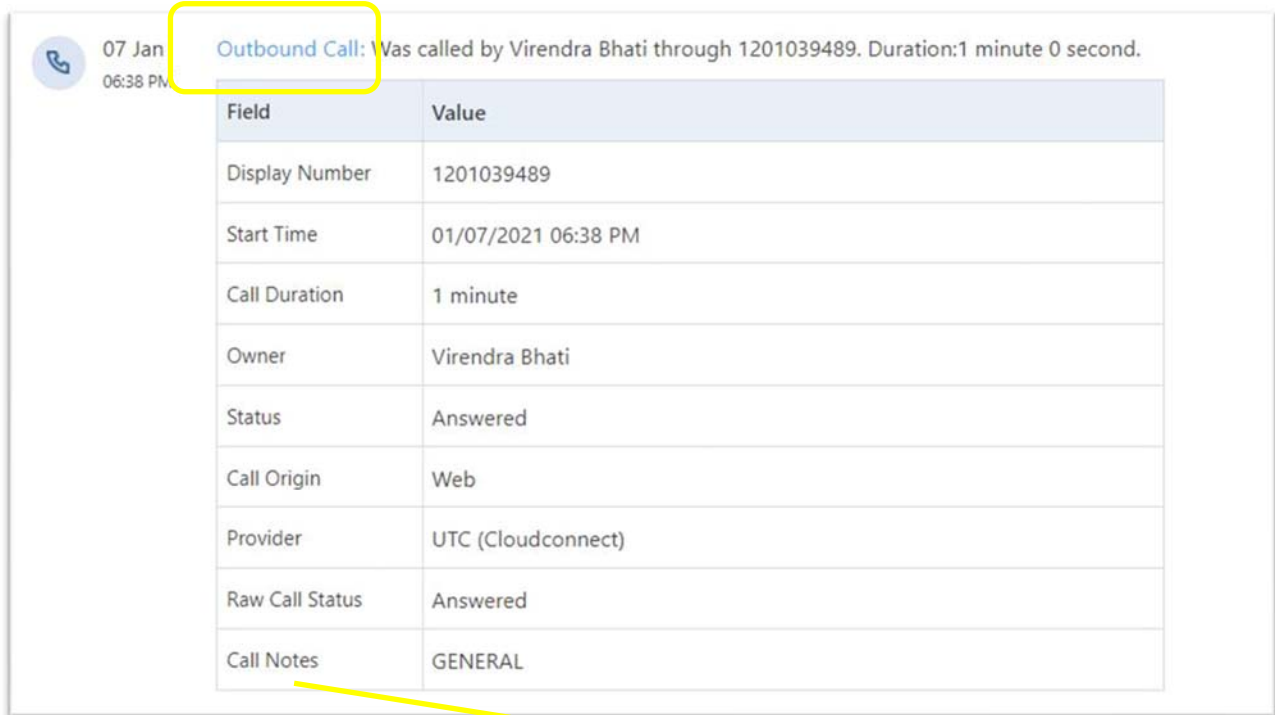
Activity History

Activity Type	Time	Description
Incoming test call	07 Jan 06:47 PM	Added by Virendra Bhati on 07 Jan 2021 06:47 PM
Inbound Call	07 Jan 06:45 PM	Had a phone call with Virendra Bhati. Duration:1 minute 47 seconds.
test lead 3	07 Jan 06:39 PM	Added by Virendra Bhati on 07 Jan 2021 06:39 PM
Outbound Call	07 Jan 06:38 PM	Was called by Virendra Bhati through 1201039489. Duration:1 minute 0 second.
test lead2	07 Jan 06:35 PM	Added by Virendra Bhati on 07 Jan 2021 06:35 PM
Outbound Call	07 Jan 06:34 PM	Was called by Virendra Bhati through 1201039489. Duration:33 seconds.

Activity History & other details of Outgoing Calls can be found here along with an option to **Download Recording & Play Recording**.



Outgoing Call related details are available under the hyperlink

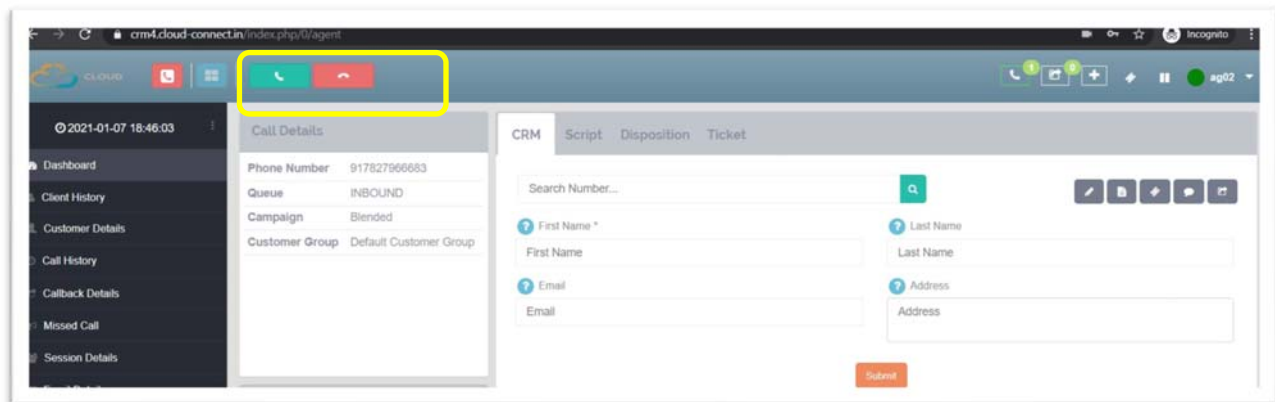


Call Notes to be configured for Call Dispositions entries

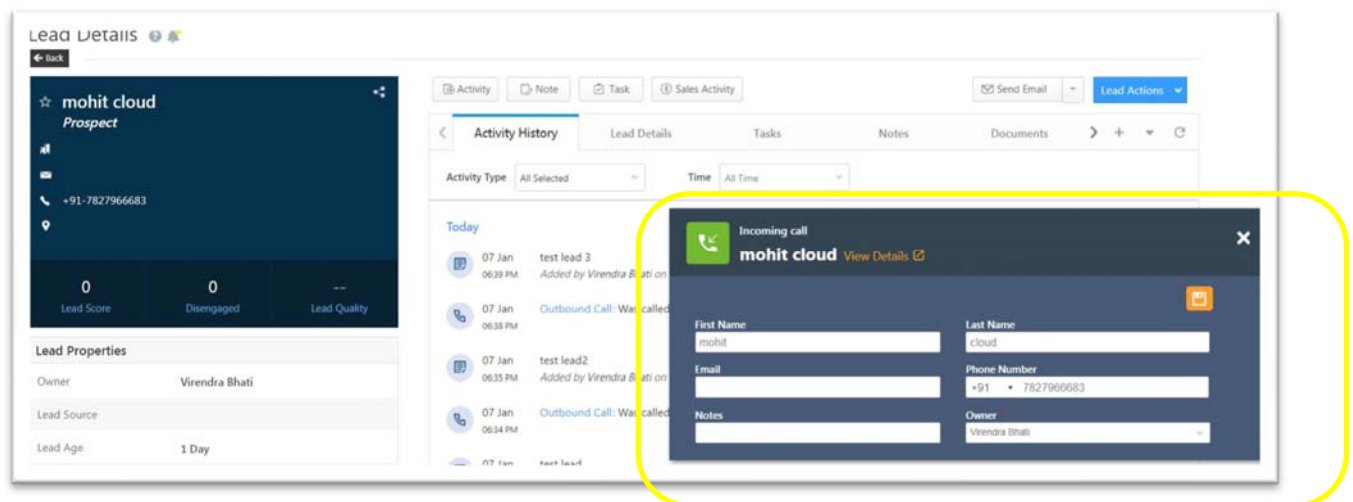
Incoming Calls:

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

Incoming call in CloudConnect panel



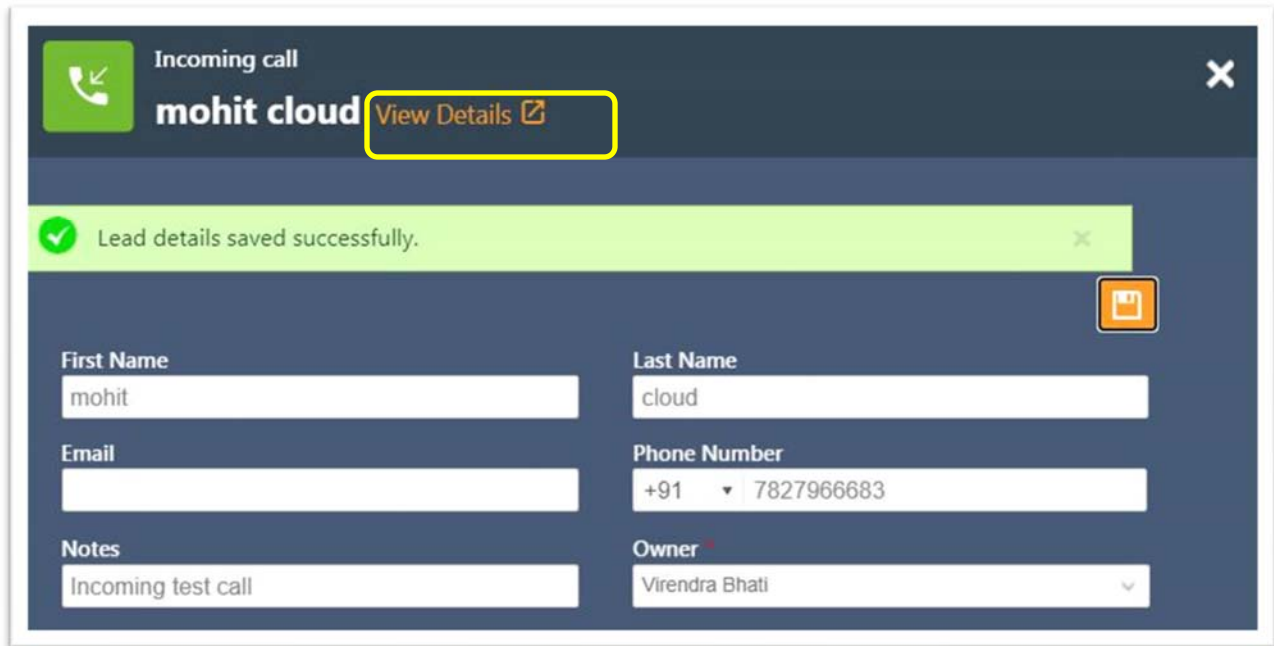
Incoming call Pop-up in LeadSquared CRM



If the caller details are already available in the system, the pop-up will display the details of the caller & with a single click customer profile will be displayed.

In case of a number mapped to multiple agents then incoming call will be displayed on CloudConnect platform to all agents, however Pop-up on LeadSquared CRM would be displayed to only agent who will receive the call.

It also facilitates to create a lead for Incoming Calls.

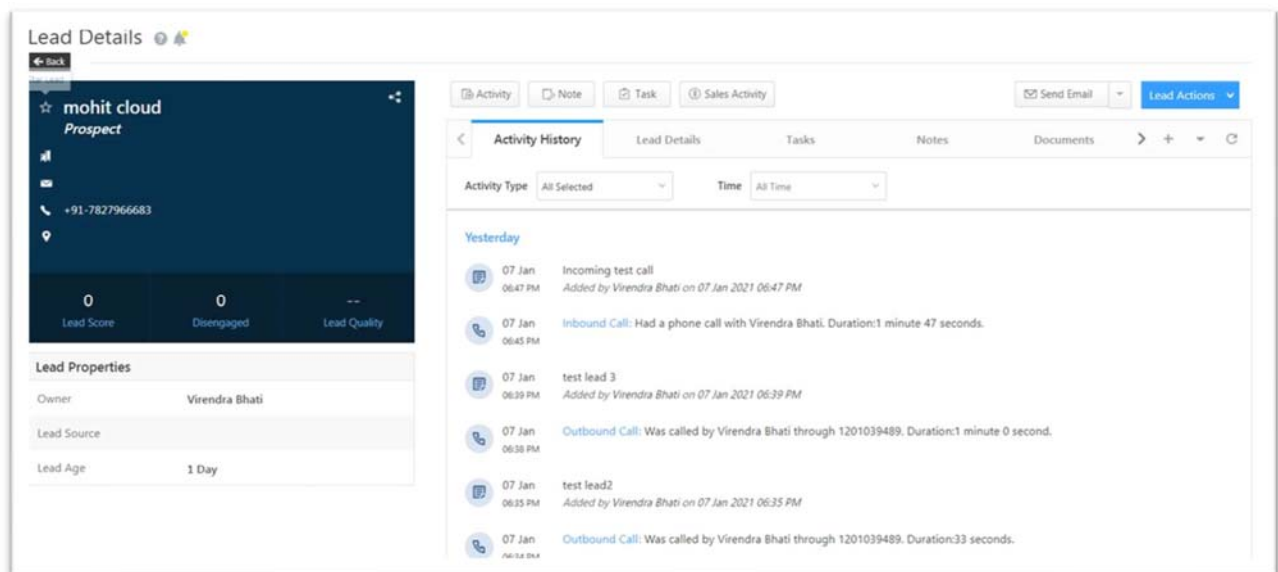


Incoming call mohit cloud [View Details](#)

Lead details saved successfully.

First Name	mo hit	Last Name	cloud
Email		Phone Number	+91 7827966683
Notes	Incoming test call	Owner	Virendra Bhati

On clicking 'View Details', Lead details would be displayed



Lead Details

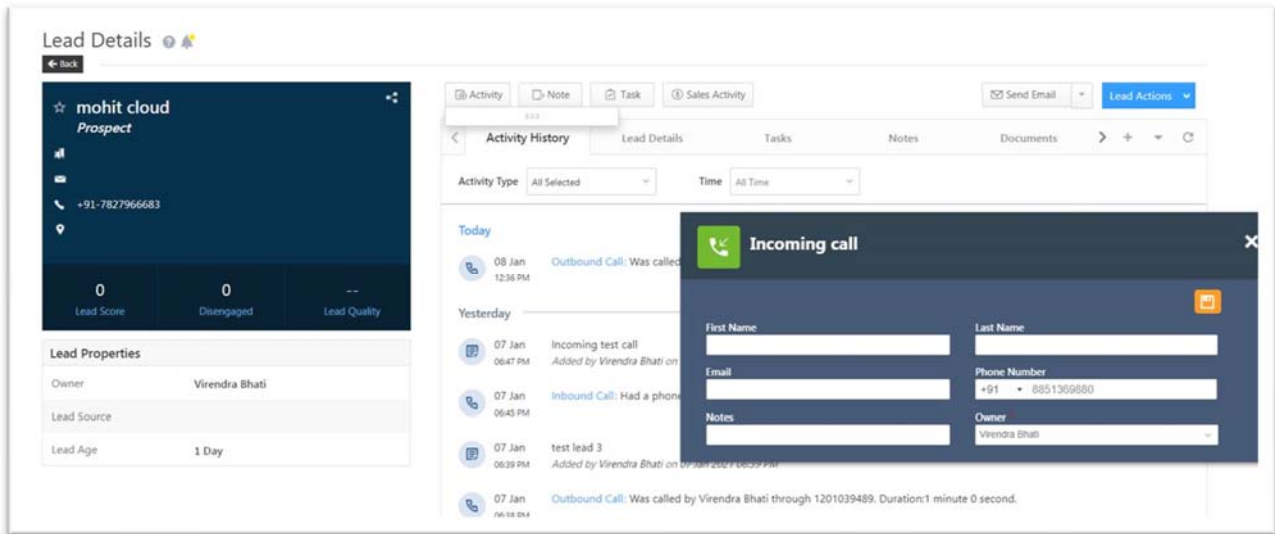
Lead Properties

Owner	Virendra Bhati
Lead Source	
Lead Age	1 Day

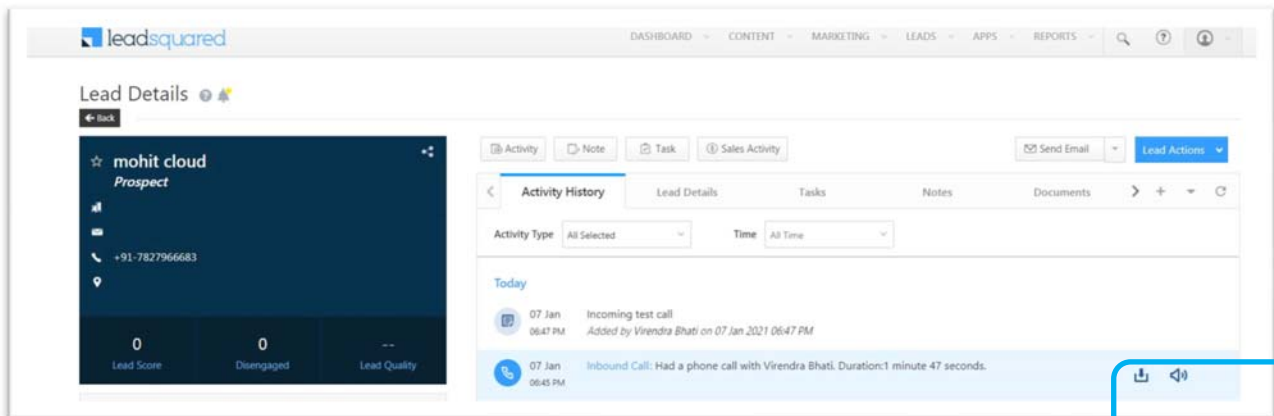
Activity History

Activity Type	Time
Yesterday	
07 Jan 06:47 PM	Incoming test call Added by Virendra Bhati on 07 Jan 2021 06:47 PM
07 Jan 06:45 PM	Inbound Call: Had a phone call with Virendra Bhati. Duration:1 minute 47 seconds.
07 Jan 06:39 PM	test lead 3 Added by Virendra Bhati on 07 Jan 2021 06:39 PM
07 Jan 06:38 PM	Outbound Call: Was called by Virendra Bhati through 1201039489. Duration:1 minute 0 second.
07 Jan 06:35 PM	test lead2 Added by Virendra Bhati on 07 Jan 2021 06:35 PM
07 Jan 06:34 PM	Outbound Call: Was called by Virendra Bhati through 1201039489. Duration:33 seconds.

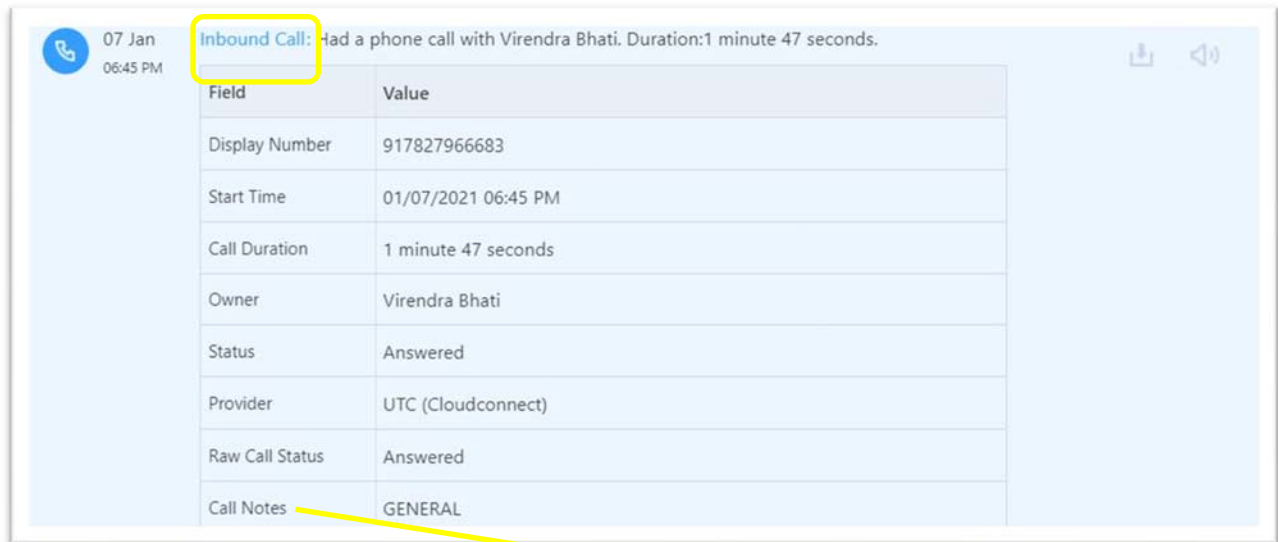
In case an unknown caller is calling, pop-up will facilitate to fill in the details & create as a lead/contacts.



Activity History & other details of Outgoing Calls can be found here along with an option to **Download Recording & Play Recording**.



Incoming Call related details are available under the hyperlink



Field	Value
Display Number	917827966683
Start Time	01/07/2021 06:45 PM
Call Duration	1 minute 47 seconds
Owner	Virendra Bhati
Status	Answered
Provider	UTC (Cloudconnect)
Raw Call Status	Answered
Call Notes	GENERAL

Call Notes to be configured for Call Dispositions entries

