

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@cloudconnect.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 <u>My Accounts > Settings > Profile</u>
- Mention Admin DID as the "Telephony Agent Id"
- Option "Show Phone Call Popup" to be marked as 'Yes'
- Mention "Agent Phone Numbers"

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Settings @				Search Sattings	Q	
Profile	Personal Settings	My Profile				
Users and Permissions	My Profile	Admin				
Security	My Pastword	amesh@doud-co	mectan.			
Leads	My Email Signature	Administrator				
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Lead Tracking	My Leaves				-	
Lead Prioritization	Organization Settings	First Name	Admin			
Email Settings	Company Workle	Last Name	-			
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		Date Pormat	mm/0d/3399			
		Time Zone	(GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi			
		Work Details				1



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

leadsquared	DASHBOARD	CONTENT - MARKETING - LEADS - WORKFLOW	W - APPS - REPORTS - Q 🕐 ① -
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After the installation, Click **Configure**

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

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Marketplace o	Configure Universal T	elephony Connector			ő	
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	Virtual Numbers	Add all your virtual phone	numbers. Optionally, you can tag them.			
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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**'

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

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Prospect			
 +91-7827966683 • 	3		Activity Type All Selected v Time All Time v
0	0		O6 Jan trying to test another call incoming O1:15 PM Added by Vinendra Bhati on 06 Jan 2021 01:15 PM
Lead Score	Disengaged	Lead Quality	Ob Jan Outbound Call: Was called by Virendra Bhati through 1201039489. Duration:44 seconds.
ead Properties			06 Jan mohit
Swner	Virendra Bhati		01.12 PM Added by Virendra Bhati on 06 Am 2021 01:12 PM
ead Source			O6 Jan Inbound Call: Had a phone call with Virendra Bhati. Duration:46 seconds.
			Otti Ha

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

It will ask to reconfirm to initiate outgoing calls

Confirm		
Are you sure, you want to initiate a call with +91-7827966	683	



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

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Ø2021-01-07 18:29:28	Call Details	CRM Script Disposition Ticket		
Dashboard	Phone Number 917827966683			
Client History	Queue INBOUND	Search Number	9	/ B / • 0
1. Customer Details	Campaign Manual	First Name *	O Last Name	
 Call History 	Customer Group Default Customer Group	First Name	Last Name	
Callback Details		2 Email	Address	
- Miscod Call		Email	Address	

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.

A call has been pl	laced between you and +9	1-7827966683			×
mohit clou	d	4	Activity D Note	Task Sales Activity	Send Email
Prospect			< Activity History	le at Details Tasks Notes	Documents > + + C
			Activity Type All Selected	Outgoing call	
+91-7827966683			Today	mohit cloud View Details	e î
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0	0		06/28 PM	First Name	Last Name
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d Properties			01:15 PM Added by	rendra Bhati on	
ner	Virendra Bhati			Notes	Viendra Bhati v
			6 Jan Outboun	Call: Was called	



It also facilitates to create a lead for Outgoing Calls.

Outgoing call mohit cloud View Details		>
Contract Con		×
First Name mohit	Last Name Cloud	
Email	Phone Number +91 ▼ 7827966683	
Notes test lead 3	Owner Virendra Bhati	~
u Virandra Phati thraugh 1201020400. Duration:50	coconde	

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

🔅 mohit clou	ıd	-=	B Activity D Note Task O Sales Activity Set Gend Email * Lead Action	*
Prospect			Activity History Lead Details Tasks Notes Documents > + *	C
• +91-782796668:	3		Activity Type All Selected \checkmark Time All Time \checkmark	
•			Yesterday	
0	0		OF Jan Incoming test call ousz PM Added by Virendra Bhati on 07 Jan 2021 06/47 PM	
Lead Score	Disengaged	Lead Quality	O7 Jan Inbound Call: Had a phone call with Virendra Bhati. Duration:1 minute 47 seconds. deas PM	
ead Properties			07 Jan test lead 3	
Owner	Virendra Bhati		0639 PM Added by Virendra Bhati on 07 Jan 2021 06:39 PM	
Lead Source			Outbound Call: Was called by Virendra Bhati through 1201039489. Duration:1 minute 0 second. Outbound Call: Was called by Virendra Bhati through 1201039489. Duration:1 minute 0 second.	
.ead Age	1 Day		O7 Jan test lead2 ocs5 FM Added by Vinendra Bhati on 07 Jan 2021 06:35 FM	
			Or Jan Outbound Call: 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**.

mohit clou	d	*	(i) Activity □ Note ② Task ③ Sales Activity ③ Send Email * Lead Actions *	
Prospect			Activity History Lead Details Tasks Notes Documents > + + C	
+91-7827966683			Activity Type All Selected · Time All Time ·	
			Today	
			O7 Jan test lead 3 Addrd by Virendra Bhati on 07 Jan 2021 06:39 PM	
U Lead Score	Disengaged	Lead Quality	07 Jan Outbound Call: Nas called by Virendra Bhati through 1201039489. Duration: 1 minute 0 second.	

Outgoing Call related details are available under the hyperlink

Field	Value
Display Number	1201039489
Start Time	01/07/2021 06:38 PM
Call Duration	1 minute
Owner	Virendra Bhati
Status	Answered
Call Origin	Web
Provider	UTC (Cloudconnect)
Raw Call Status	Answered
Call Notes	GENERAL

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

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👛 📭 🚺			↓⁰ ⊡⁰ + ≠ Ⅲ ● ag02 +
O 2021-01-07 18:46:03	Call Details	CRM Script Disposition Ticket	
Dashboard	Phone Number 917827966683	-	_
6 Client History	Queue INBOUND	Search Number	
L Customer Details	Campaign Blended	First Name *	C Last Namo
Call History	Customer Group Default Customer Group	First Name	Last Name
Callback Details		Email	Address
Missed Call		Email	Address
Session Details			
			Submit

Incoming call Pop-up in LeadSquared CRM

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a contractor			5	Activity Hi	istory Lead	Details	Tasks Notes	Documents 2 +	• G	
-			Activity	y Type Al	I Selected		Time All Time v			
+91-782796668										T.
•			Today	07 Jan	test lead 3		Incoming call mohit cloud View Details @		×	
0	0			99.22 110	House by theiring of	40.00				
Lead Score	Disengaged	Lead Quality	8	07 Jan 0638 PM	Outbound Call: Was	called	First Name	Last Name	—	
ad Properties							mohit	cloud		
wner	Virendra Bhati			07 Jan 0635 PM	test lead2 Added by Virendra B	ati on	Email	Phone Number +91 • 7827966683		
ead Source			8	07 Jan	Outbound Call: Was	called	Notes	Owner		
CERT STATUE			6	06:34 PM			Notes	Virendra Bhati	. V.	

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 Detai	ls 🖸
Lead details saved successfully.	
First Name mohit	Last Name
Email	Phone Number +91 ▼ 7827966683
Notes	Owner

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

mohit cloud	1	-=	() Activ	ity 🖸	Note	🖻 Task	③ Sales Acti	vity			Send Em	all -	Lead	1 Actions	*
			< 1	Activity His	story	Lead D	etails	Tasks		Notes	Documer	its	> +	6 8	C
			Activity	y Type All	Selected		Time	All Time	÷						
+91-7827966683															
?			Yester	day											
			(17)	07 Jan	Incoming	test call									
0	0			06:47 PM	Added by 1	Virendra Bhat	ti on 07 Jan 202	1 06:47 PM							
	Disengaged	Lead Quality	8	07 Jan	Inbound C	all: Had a p	hone call with	Virendra Bhati	Duration:1 r	ninute 47 seconds.					
1.0				06/45 PM											
ad Properties			1	07 Jan	test lead 3	6									
vner	Virendra Bhati			OE:39 PM	Added by I	Virendra Bhai	ti on 07 Jan 202	1 06:39 PM							
ad Source			8-	07 Jan	Outbound	Call: Was c	alled by Virend	ra Shati throu	gh 12010394	89. Duration:1 min	ute 0 second.				
rd Asa	10-			06:38 PM											
ao Age	1 Day			07 Jan	test lead2										



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

n mohit clo	ud	*	B Activity C Note C Task O Sales Activity Ess Send Email * Lead Actions
Prospect			C Activity History Lead Details Tasks Notes Documents > + * C
-			Activity Type All Selected - Time All Tene -
+91-782796668	83		
			Today OB Jan Outbound Call: Was called Incoming call Incoming call
0	0		
Lead Score	Disengaged	Lead Quality	Yesterday First Name Last Name
ead Properties			07 Jan Incoming test call
Owner	Virendra Bhati		O Jan Inbound Call: Had a phone Final Phone Number +91 + 8851369880
Lead Source			6 0643 PM Notes Owner
Lead Age	1 Day		O7 Jan test lead 3 Vrendra Bhats

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

☆ mohit cloud Prospect	
+91-7827966683 9	Activity type M Selected Today Image: 07 Jan Incoming test call 04.17 MA Added by Viendra Brati on 07 Jan 2021 0647 PM
Lead Score Disengaged Lead Quali	Or Jan Inbound Call: Had a phone call with Virendra Bhati. Duration:1 minute 47 seconds.



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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)	
Davy Call Status	Annual	

Incoming Call related details are available under the hyperlink

Call Notes to be configured for Call Dispositions entries

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