



## CLOUDCONNECT integration with SALESFORCE CRM & MOBILE APPLICATION

CloudConnect integration with salesforce CRM enables agents to have one central place to manage all sales-related activities. That means they'll spend less time on administration and more time closing deals. This also gives real-time visibility into the tasks & activities.

CloudConnect's telephony integration with Salesforce CRM brings work flow automation in the system. The telephony adds a 'CloudConnect [Softphone Dialer](#)' feature that helps to initiate/receive calls within the CRM & thus saves time and improves efficiency and productivity. The call can also be initiated by using a simple [Click to Call](#) option within in the CRM or the salesforce [mobile application](#).

The CloudConnect softphone dialer helps to originates a call from Salesforce CRM simply by dialing any number one wish to reach. As the number is dialed, it also displays the link to see existing customer details.

For incoming calls, a popup will appear on the dialer (if the dialer is in open state). If the caller is an existing customer, then it will also display link with customer details and with a single click customer profile will be displayed. However, for an unknown caller, the customer details will require to be saved as a lead either during the call or after the call so that next time onwards the customer details link becomes active for incoming & outgoing calls.

In case the dialer is in minimized state, the agent will hear a ringtone & once the agent clicks on the dialer to open, it will displaying all the usual tabs.

The dialer also facilitates to select dispositions & notes/details which could also be referred later in Task/Activities over Salesforce CRM.

**Basic Requirements:**

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

Once the provisioning of accounts is done, the mapped account/agent can use telephony dialer from their Salesforce CRM.

**Note:**

CloudConnect & Salesforce CRM integration is **LIVE** with Cloud PBX.

Integration enables a CloudConnect Dialer inside the Salesforce CRM (web), Click to Call functionality using Open CTI integration inside the Salesforce CRM (web), & Click to Call using icon from Mobile application.

Click to Call functionality when used on web CRM allows to initiate call by simply clicking on the number or by using C2C icon; both. However, call can only be initiated thru C2C icon when using on salesforce mobile application.

Call forward to GSM No of an agent will not be allowed when using CRM (web) & hence agent requires to receive call on the CCPL dialer inside salesforce however, if an agent has logged in to the mobile application, then call forwarding to the GSM no of the agent can be configured.

CloudConnect Telephony integration is available with Salesforce 'Sales Cloud', 'Service Cloud' & 'Salesforce Platform'.

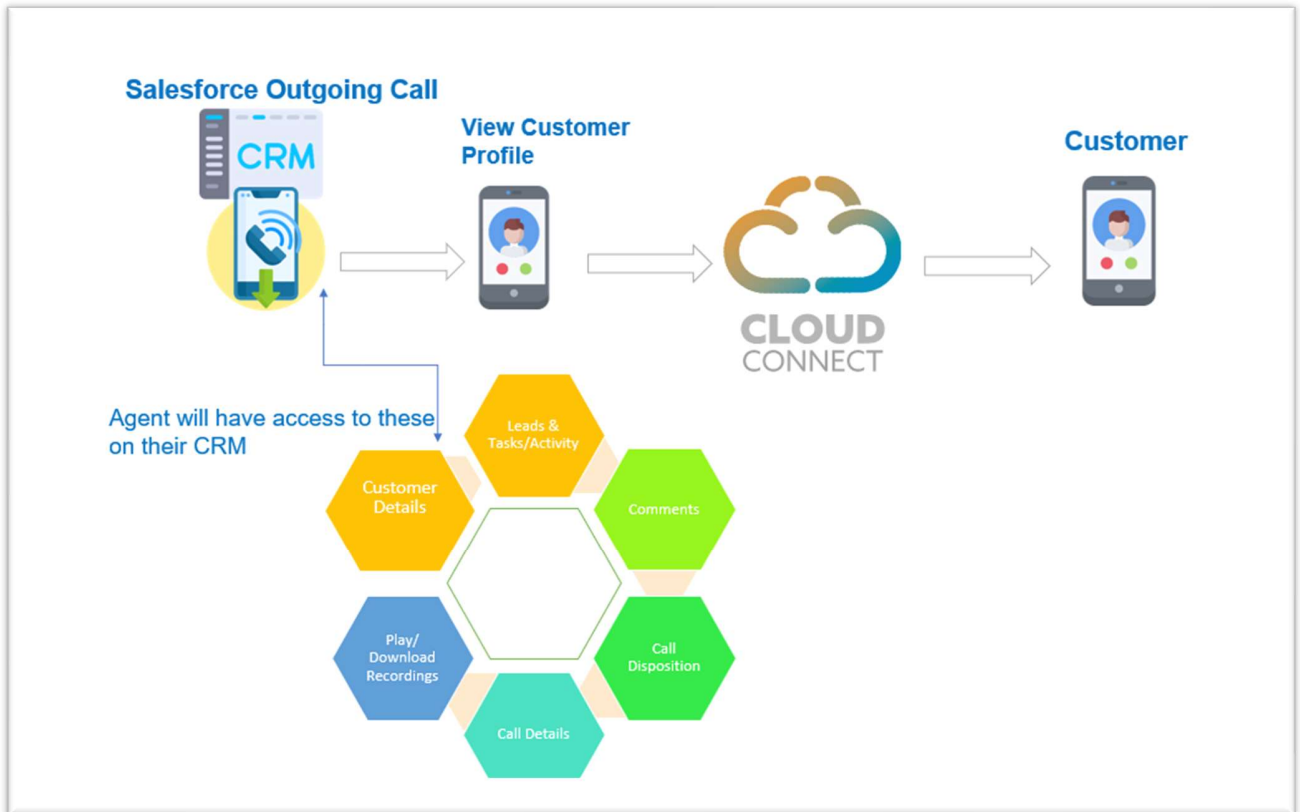
Salesforce **Sales Cloud** has four different subscription packages: Essential, Professional, Enterprise & Unlimited out of which Salesforce does not support integration for Essential & Professional subscriptions. Therefore, a customer should have Enterprise or Unlimited Sales Cloud subscriptions to avail telephony integrations.

Salesforce **Service Cloud** also has four different subscription packages: Essential, Professional, Enterprise & Unlimited and all the four subscriptions support telephony integration.

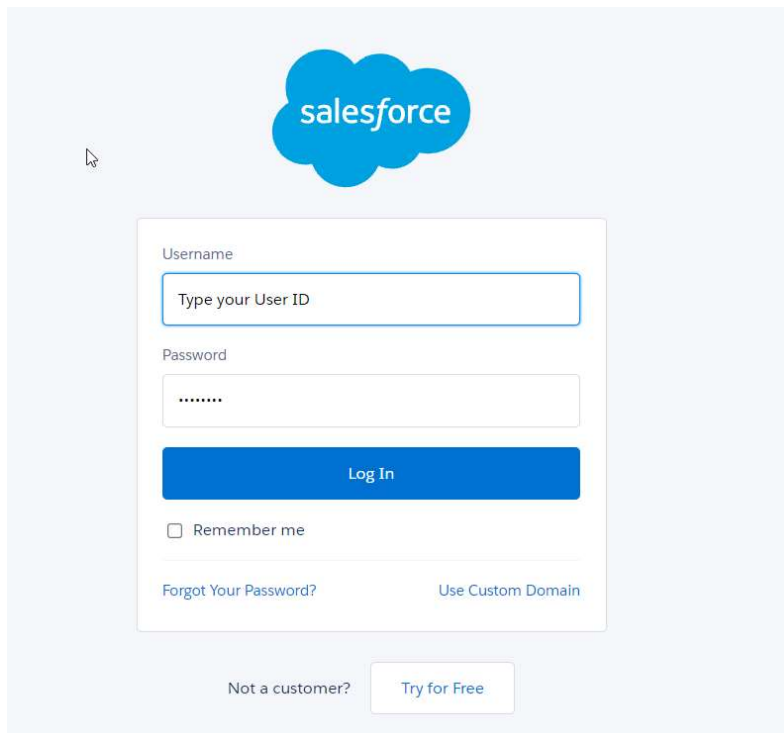
Salesforce **Platform** also has two different subscription packages: Starter & Plus and both subscriptions support telephony integration.

*\*Salesforce packages mentioned are as on 16 Dec 21.*

# Outgoing Calls:

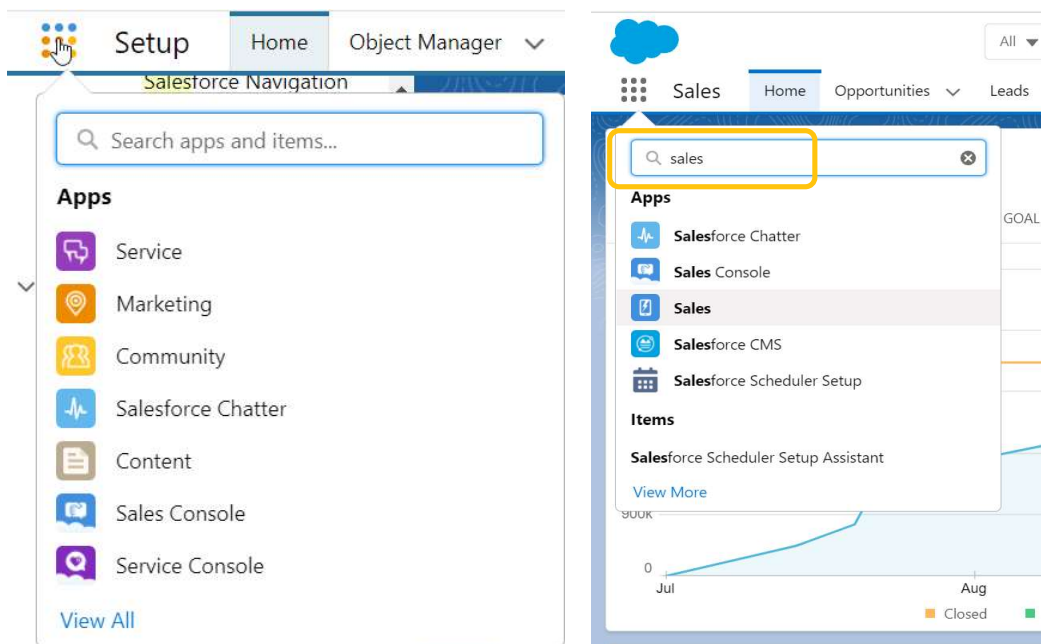


Go to login URL: <https://login.salesforce.com/?locale=in>



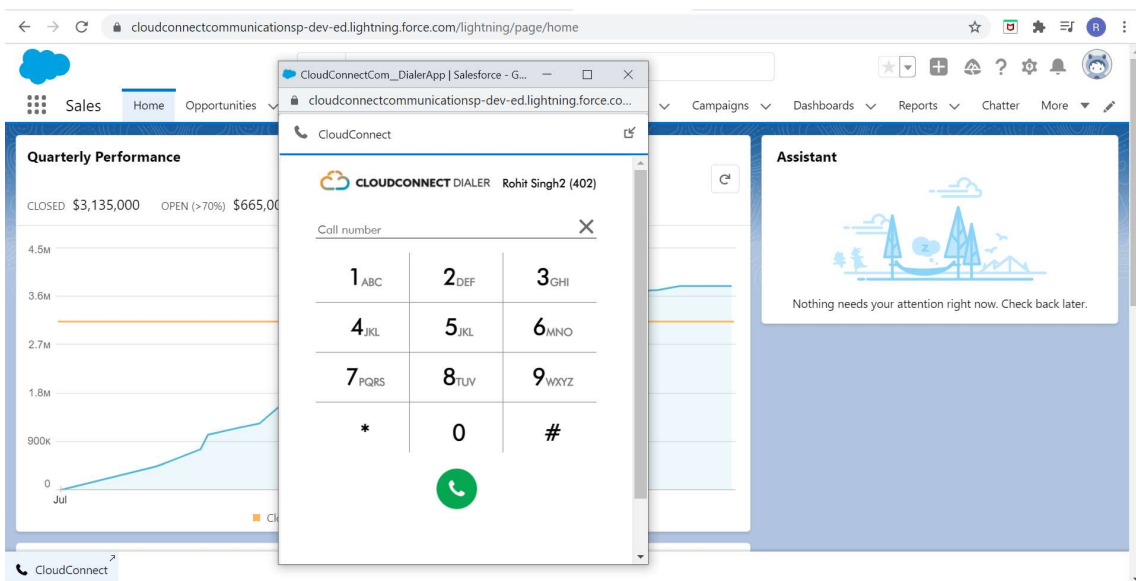
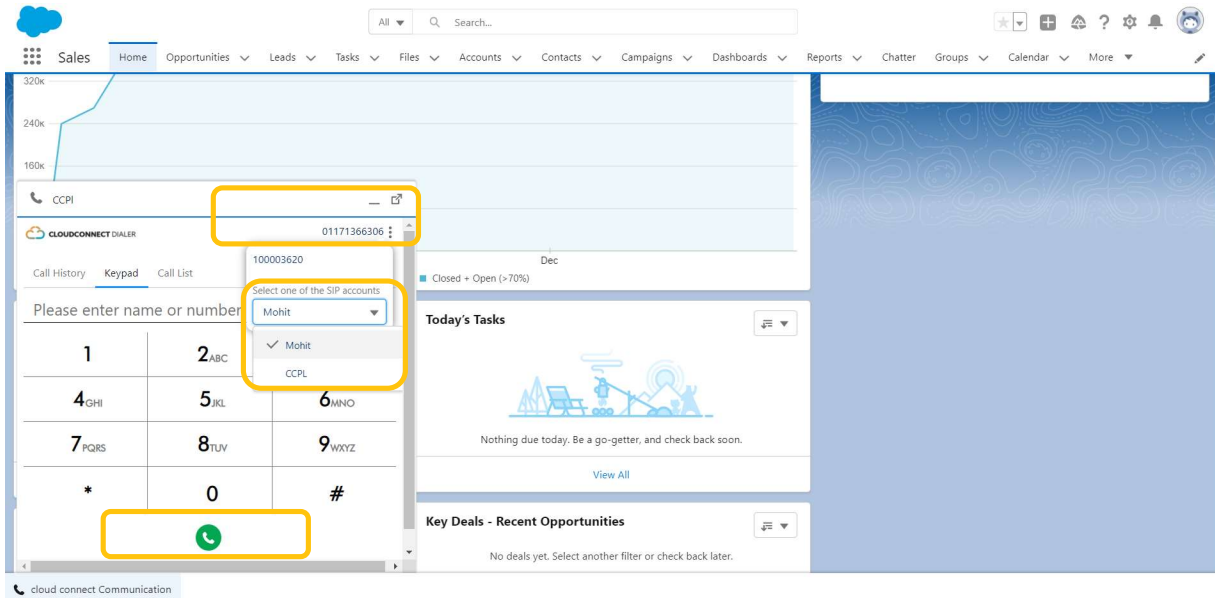
*\*Permission for Microphone & Speaker to be allowed.*

Go to Home page then click on App Launcher Icon and type **SALES** to search. Click on SALES

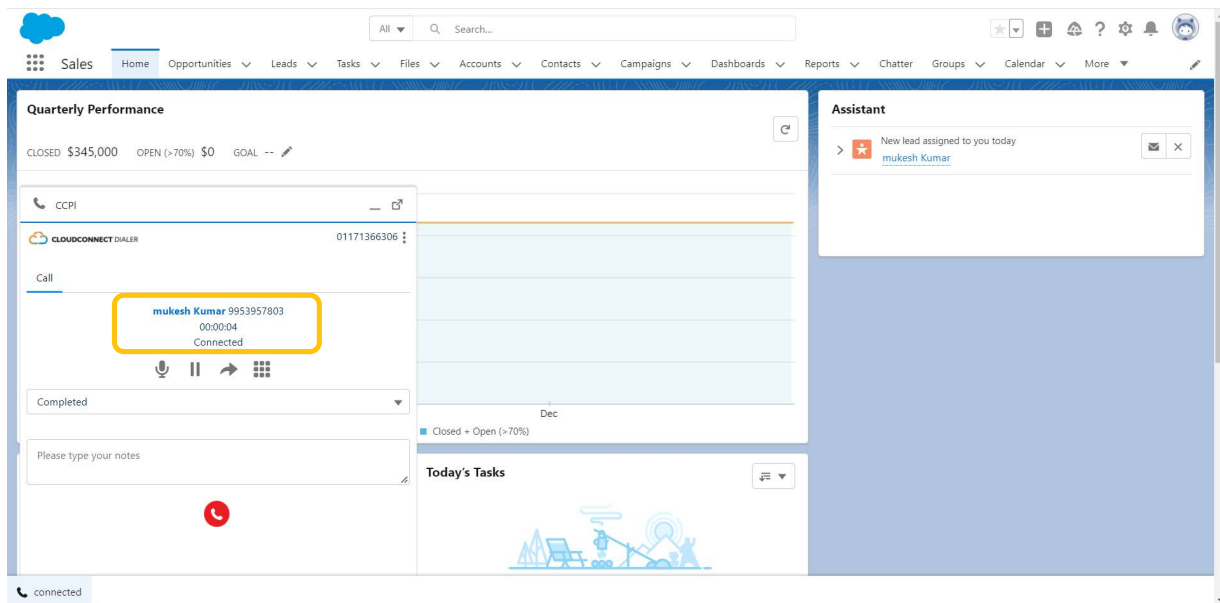
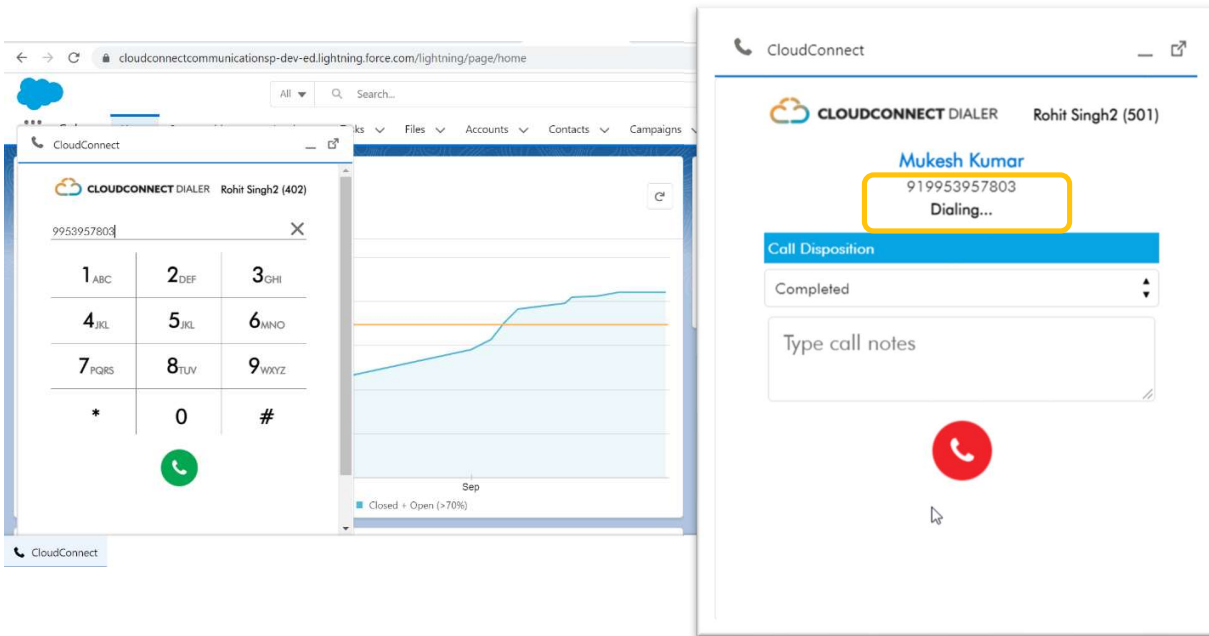


Once you are inside Sales cloud page, you will find "Cloud Connect" dialer in the bottom left side of the page.

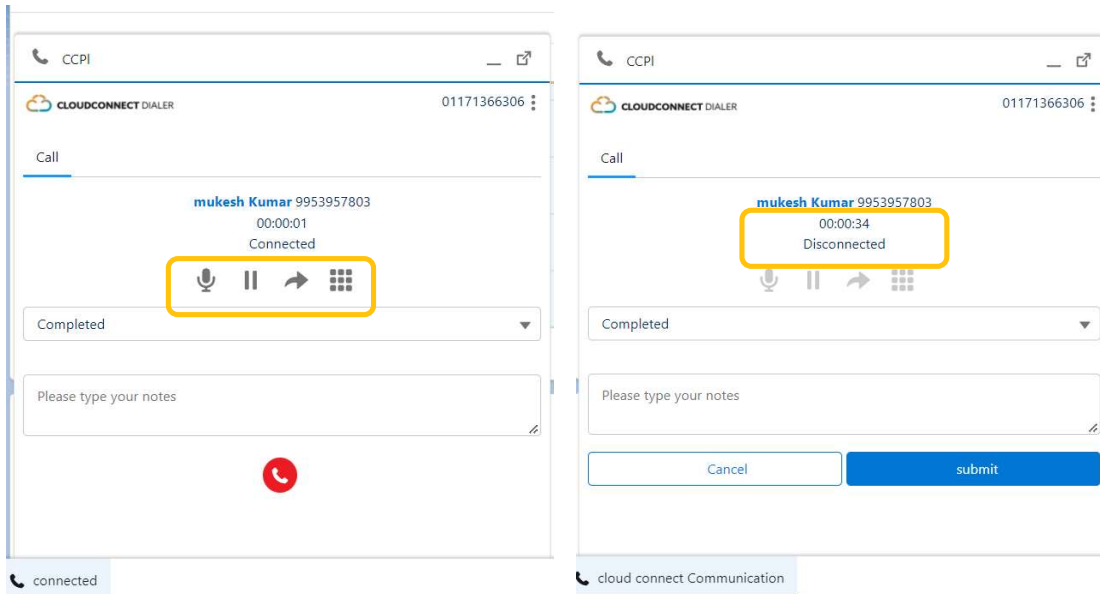
The dialer expands once you click on it. Also, dialer will remain visible/available across all the tabs in the bottom left side of the CRM. The dialer also has an option of “Pop-Out” which opens the dialer in another tab. Dialer have 3 dots on top of the right side and just a click you will switch the user easily and vice a versa.



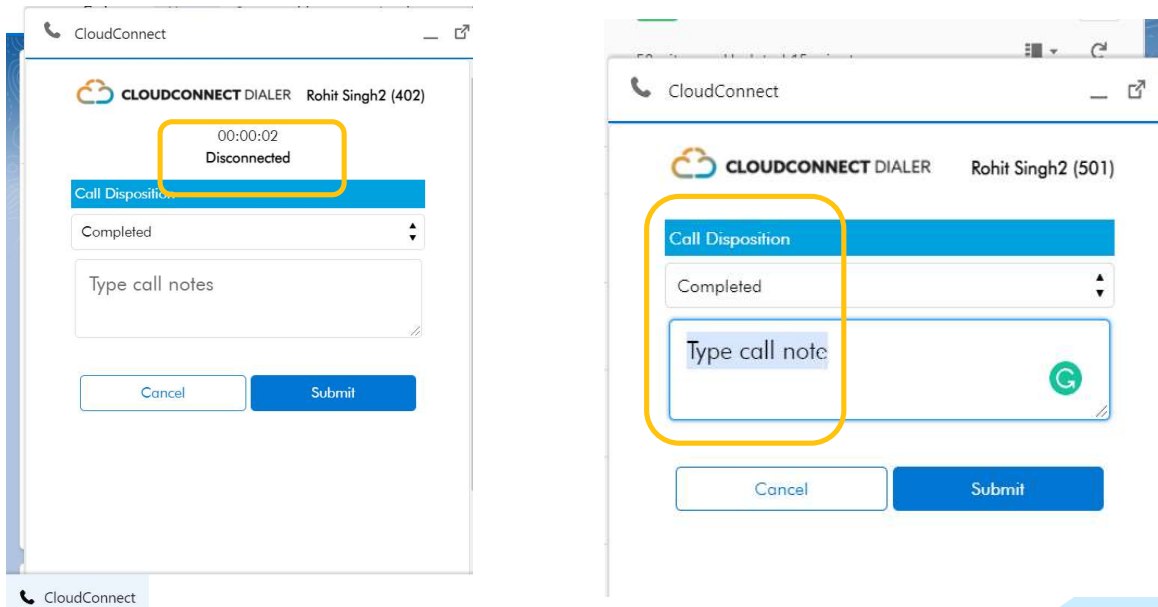
**Dialing, Ringing & Connected:** To initiate a Call, an agent can manually dial-in or copy/paste the number and either press enter key or the green button to place the call.



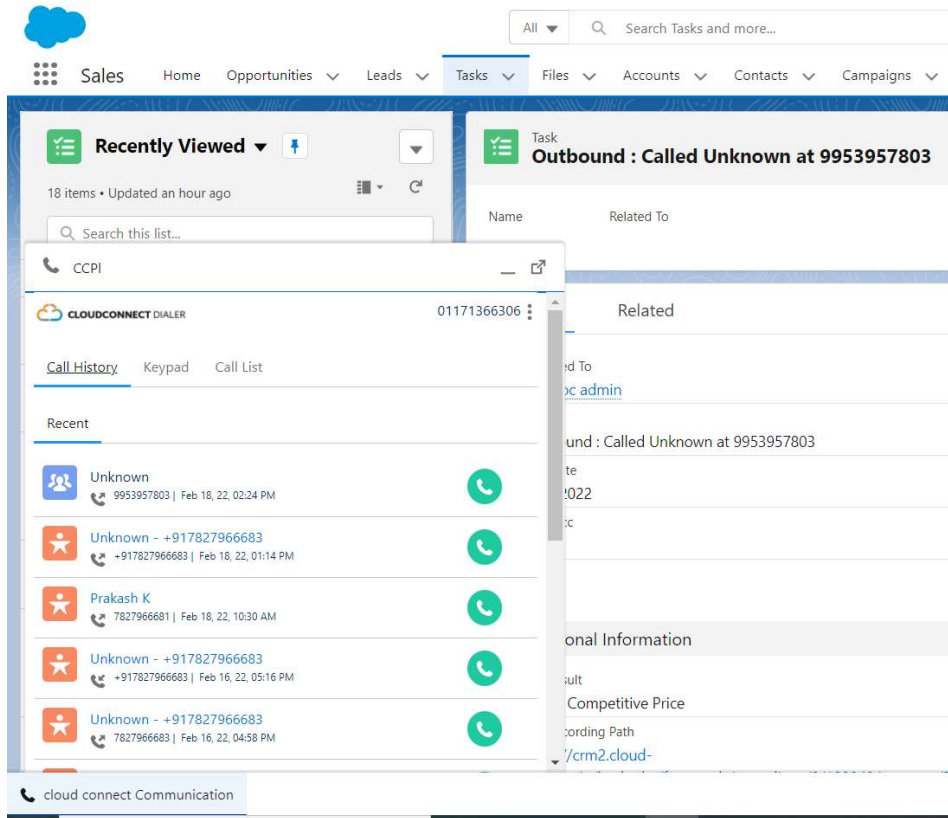
**Mute, Transfer & Call Hold:** Once the call gets connected, three icon becomes visible: Mute, Transfer and Hold



**Call Disposition & Notes:** The dialer has an option of Call Disposition & Comments/Notes as well. Agent can put those disposition/comments after the call disconnects & then submit it. This remains highlighted during the call as well, however, submission can only happen once the calls gets disconnected.



**Call History:** Once the call disposition completed you can view call log in the call history tab in dialer.



The screenshot displays the Cloud Connect interface. At the top, there is a navigation bar with tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, and Campaigns. A search bar is located to the right of the navigation bar. Below the navigation bar, the main content area is divided into two sections. The left section is titled 'Recently Viewed' and contains a list of 18 items. The right section is titled 'Task' and displays 'Outbound : Called Unknown at 9953957803'. A modal window is open over the 'Recently Viewed' section, showing the 'Call History' tab. The modal window has a title bar with 'CCPI' and 'CLOUDCONNECT DIALER' and a phone number '01171366306'. The 'Call History' tab is active, and the 'Recent' section shows a list of call records:

Icon	Name	Phone Number	Time	Status
Unknown	Unknown	9953957803	Feb 18, 22, 02:24 PM	Completed
Unknown	Unknown - +917827966683	+917827966683	Feb 18, 22, 01:14 PM	Completed
Prakash K	Prakash K	7827966681	Feb 18, 22, 10:30 AM	Completed
Unknown	Unknown - +917827966683	+917827966683	Feb 16, 22, 05:16 PM	Completed
Unknown	Unknown - +917827966683	7827966683	Feb 16, 22, 04:58 PM	Completed

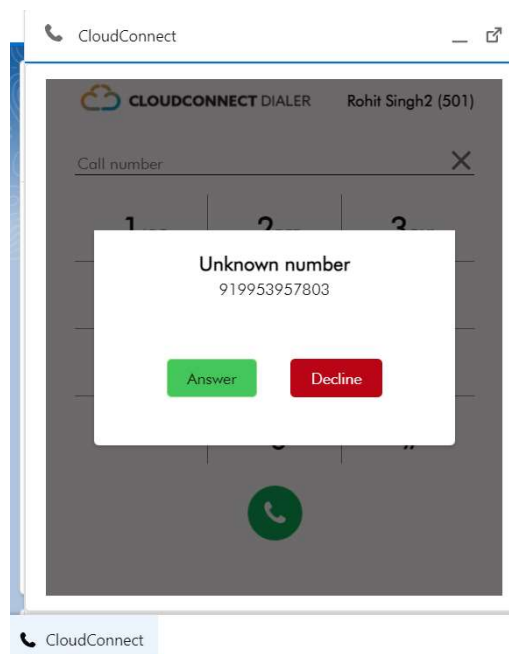
The modal window also shows a 'Related' section with a list of related items and a 'Personal Information' section with fields for Name, Title, Competitive Price, and Recording Path.



## Incoming Calls:



**Incoming Call:** An incoming call will land on the dialer & it will show the call notifier pop-up. This allows us to answer or decline the call. This will also have an option of call disposition & comments as it is for outgoing calls.

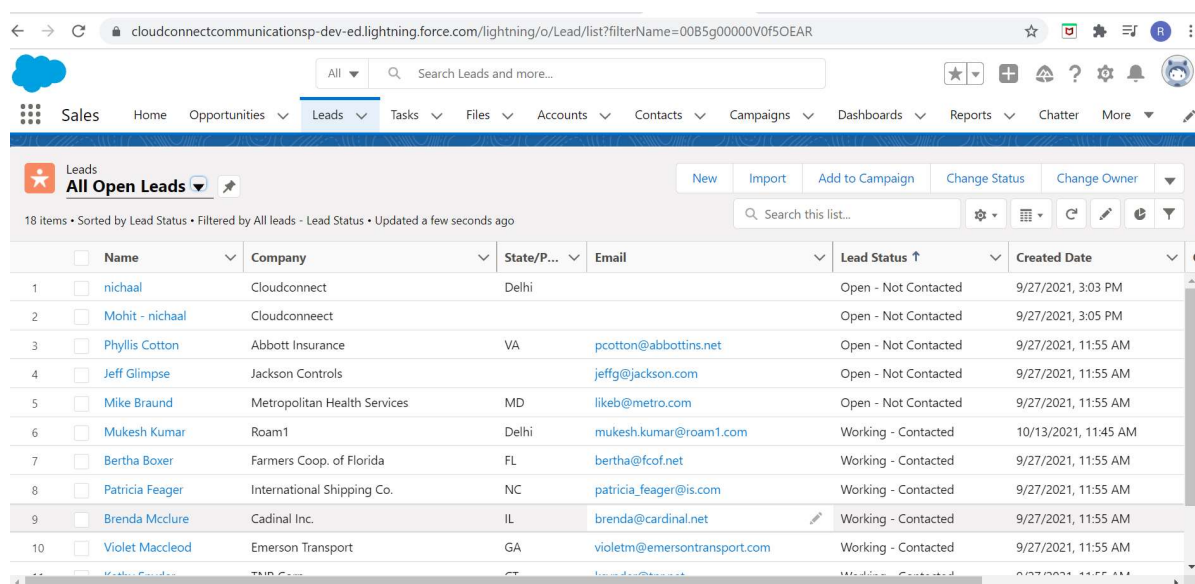


For incoming calls, a popup will appear on the dialer (if the dialer is in open state). If the caller is an existing customer, then it will also display link with customer details and with a single click customer profile will be displayed. However, for an unknown caller, the customer details will require to be saved as a lead either during the call or after the call so that next time onwards the customer details link becomes active for incoming & outgoing calls. Auto Lead creation for unknown caller during the call is not available & will be part of future release.

In case the dialer is in minimized state, the agent will hear a ringtone & once the agent clicks on the dialer to open, it will displaying all the usual tabs.

## Leads:

Agent can click on Leads tab in the CRM to create a new Lead. Once the lead is saved in the CRM, customer details tab will be made available on the CloudConnect dialer for outgoing & incoming calls to quickly refer customer details.



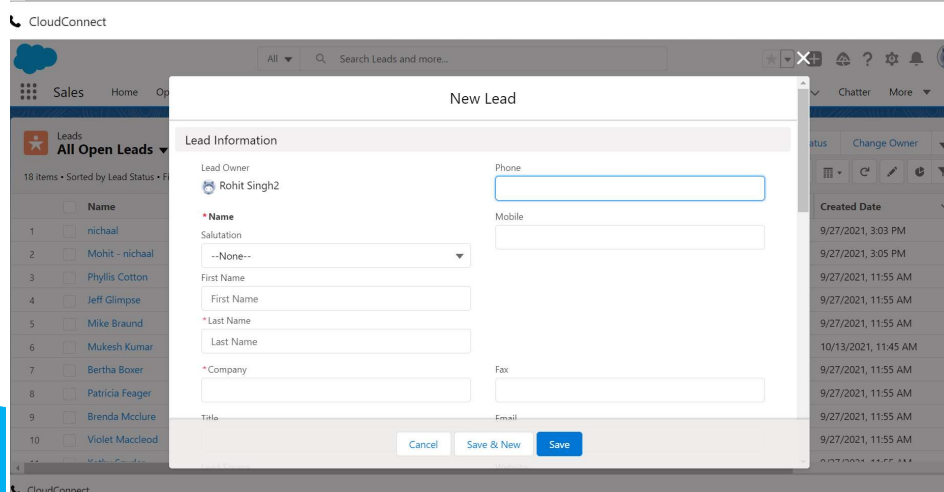
cloudconnectcommunicationsp-dev-ed.lightning.force.com/lightning/o/Lead/list?filterName=00B5g00000V0f5OEAR

Leads

All Open Leads

18 items • Sorted by Lead Status • Filtered by All leads • Lead Status • Updated a few seconds ago

	Name	Company	State/P...	Email	Lead Status ↑	Created Date
1	nichaal	Cloudconnect	Delhi		Open - Not Contacted	9/27/2021, 3:03 PM
2	Mohit - nichaal	Cloudconnect			Open - Not Contacted	9/27/2021, 3:05 PM
3	Phyllis Cotton	Abbott Insurance	VA	pcotton@abbottins.net	Open - Not Contacted	9/27/2021, 11:55 AM
4	Jeff Glimpse	Jackson Controls		jeffg@jackson.com	Open - Not Contacted	9/27/2021, 11:55 AM
5	Mike Braund	Metropolitan Health Services	MD	likeb@metro.com	Open - Not Contacted	9/27/2021, 11:55 AM
6	Mukesh Kumar	Roam1	Delhi	mukesh.kumar@roam1.com	Working - Contacted	10/13/2021, 11:45 AM
7	Bertha Boxer	Farmers Coop. of Florida	FL	bertha@fcf.net	Working - Contacted	9/27/2021, 11:55 AM
8	Patricia Feager	International Shipping Co.	NC	patricia_feager@is.com	Working - Contacted	9/27/2021, 11:55 AM
9	Brenda McClure	Cadinal Inc.	IL	brenda@cardinal.net	Working - Contacted	9/27/2021, 11:55 AM
10	Violet Macleod	Emerson Transport	GA	violetm@emersontransport.com	Working - Contacted	9/27/2021, 11:55 AM



CloudConnect

New Lead

Lead Information

Lead Owner: Rohit Singh2

Phone:

Mobile:

Fax:

Email:

Title:

\* Name: Salutation: --None--

First Name:

Last Name:

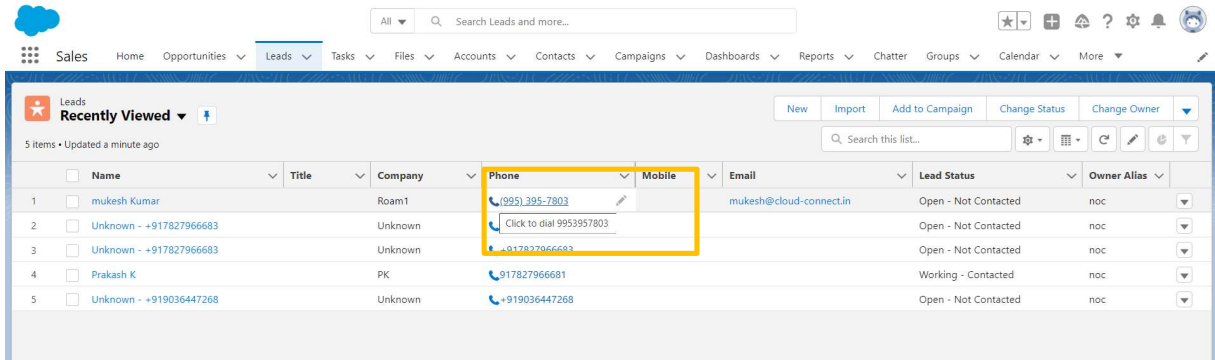
\* Company:

Buttons: Cancel, Save & New, Save

# Click To Call:

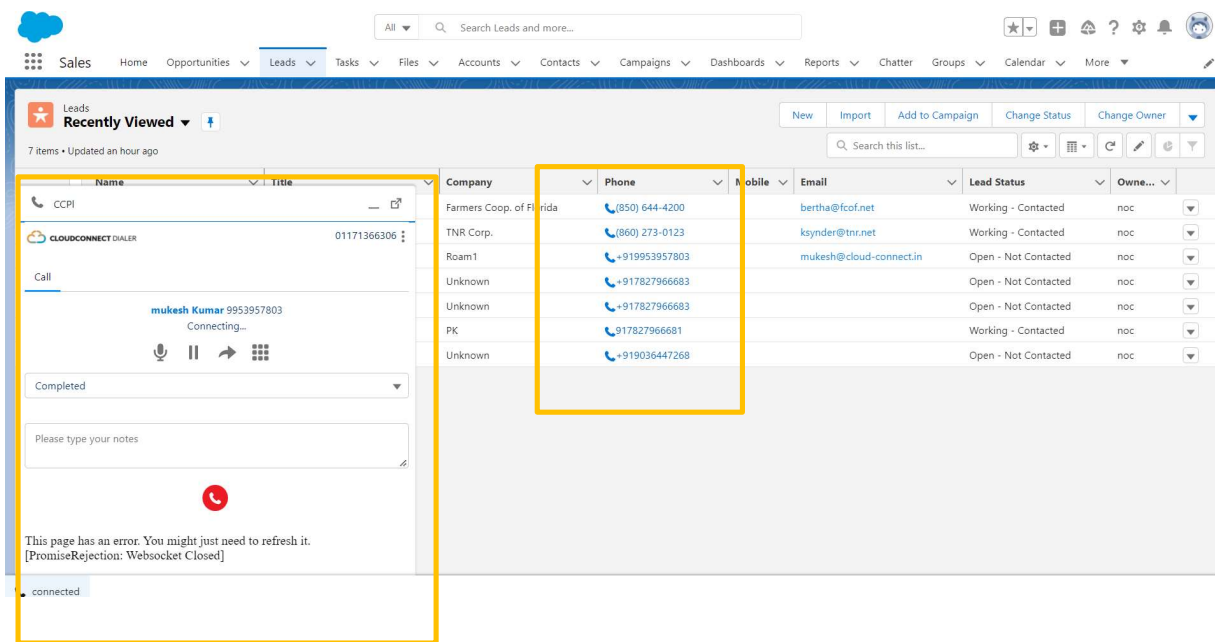
Click To Call functionality has been enabled for the customer to initiate a call by clicking any of the number form the CRM. After initiating the call, CloudConnect dialer pop out and then the call gets connected.

Customer also has the provision to make any calls directly from the dialer.



The screenshot shows the CRM interface with a list of leads under the 'Recently Viewed' tab. The 'Phone' column contains several phone numbers, with a yellow box highlighting the first one: (955) 395-7803. A tooltip appears over this number, displaying 'Click to dial 9553957803' and a phone icon.

Name	Title	Company	Phone	Mobile	Email	Lead Status	Owner Alias
mukesh Kumar		Room1	(955) 395-7803		mukesh@cloud-connect.in	Open - Not Contacted	noc
Unknown - +917827966683		Unknown	+917827966683			Open - Not Contacted	noc
Unknown - +917827966683		Unknown	+917827966683			Open - Not Contacted	noc
Prakash K		PK	+917827966681			Working - Contacted	noc
Unknown - +919036447268		Unknown	+919036447268			Open - Not Contacted	noc



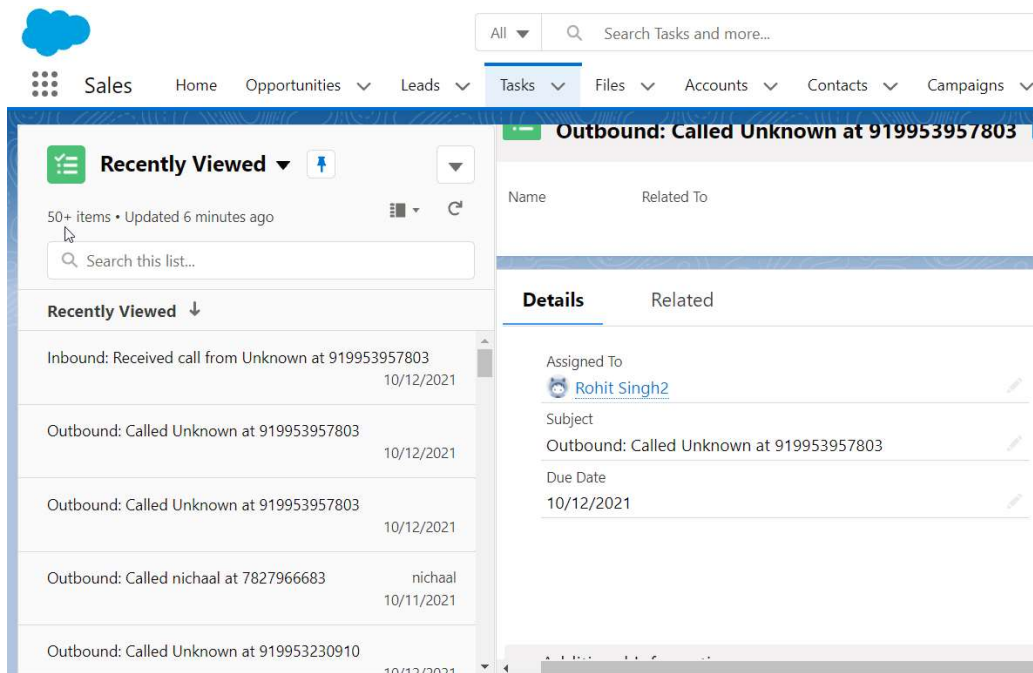
The screenshot shows the CRM interface with a call in progress. A yellow box highlights the 'Phone' column of the lead list, which contains the number (850) 644-4200. Another yellow box highlights the call overlay on the left side of the screen. The overlay shows the call status as 'Connecting...' and includes a 'Completed' dropdown menu, a text input field for notes, and a red phone icon. Below the overlay, there is an error message: 'This page has an error. You might just need to refresh it. [PromiseRejection: Websocket Closed]'. The status bar at the bottom shows 'connected'.

Name	Title	Company	Phone	Mobile	Email	Lead Status	Owner...
CCPI		Farmers Coop. of Florida	(850) 644-4200		bertha@fcof.net	Working - Contacted	noc
CLCLOUDCONNECT DIALER	01171366306	TNR Corp.	(860) 273-0123		ksynder@tnr.net	Working - Contacted	noc
		Room1	+919953957803		mukesh@cloud-connect.in	Open - Not Contacted	noc
		Unknown	+917827966683			Open - Not Contacted	noc
		Unknown	+917827966683			Open - Not Contacted	noc
		PK	+917827966681			Working - Contacted	noc
		Unknown	+919036447268			Open - Not Contacted	noc

## Tasks:

Once the call is completed, agent can click on **Task** tab and get the details of the call & the activity of the call.

Left panel on the page displays the call logs, agent can click on any of the call log to find call related details, Call recording, disposition, comments & other additional information.



The screenshot shows a CRM interface with a navigation bar at the top containing 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', and 'Campaigns'. A search bar is present with the text 'Search Tasks and more...'. The main content area is split into two panels. The left panel, titled 'Recently Viewed', shows a list of call logs with columns for 'Name' and 'Related To'. The right panel, titled 'Outbound: Called Unknown at 919953957803', shows details for a specific task.

Name	Related To
Inbound: Received call from Unknown at 919953957803	10/12/2021
Outbound: Called Unknown at 919953957803	10/12/2021
Outbound: Called Unknown at 919953957803	10/12/2021
Outbound: Called nichaal at 7827966683	nichaal 10/11/2021
Outbound: Called Unknown at 919953230910	10/12/2021

Details	Related
Assigned To	<a href="#">Rohit Singh2</a>
Subject	Outbound: Called Unknown at 919953957803
Due Date	10/12/2021

**Additional Information** like call recording link, call id, call second, callee, call status, comments etc.

Additional Information	
Call Result Completed	Caller Geo Location
Call Recording Path <a href="https://dev.cloud-connect.in/hodupbx/fs_sounds/recordings/0/100485/auto_rec/2021-10-12/d3d08778-d7b7-4f12-9114-30d0bbce66a6.wav">https://dev.cloud-connect.in/hodupbx/fs_sounds/recordings/0/100485/auto_rec/2021-10-12/d3d08778-d7b7-4f12-9114-30d0bbce66a6.wav</a>	Call Type
Unique Token c139152c-24a3-433d-b50d-b2cb75471a42	Call ID 120529
Hangup Reason SUCCESS	Hangup By CUSTOMER
Call Status Unanswered	Call Sec 18
Callee Answer Second 0	Answer Sec 0
Bridge Time 0000-00-00 00:00:00	Answer Time 0000-00-00 00:00:00

Task page has another option of Follow-up, Edit Details & Edit comments.

**Follow-Up:** Click on Create Follow-up tab to further fill the information like status, subject, due date, priority, description information etc.

### Follow Up

Task Information

Assigned To

1 Total Task

\*Subject

Due Date

\*Status

--None--

✓ Not Started

In Progress

Completed

Waiting on someone else

Deferred

## Follow Up

### Task Information

Assigned To

1 Total Task

\*Subject

Due Date

\*Status

Name

Related To

+ New Account

Normal

Save & New

Cancel

Save

**Related To** option inside Follow-up page facilitates to create new account as well, if not already available. Agent needs to click on Add Account under Related To option:

## New Account

### Account Information

Account Owner

Rohit Singh2

Rating

\*Account Name

Phone

Parent Account

Fax

Account Number

Website

Account Site

Ticker Symbol

Cancel

Save & New

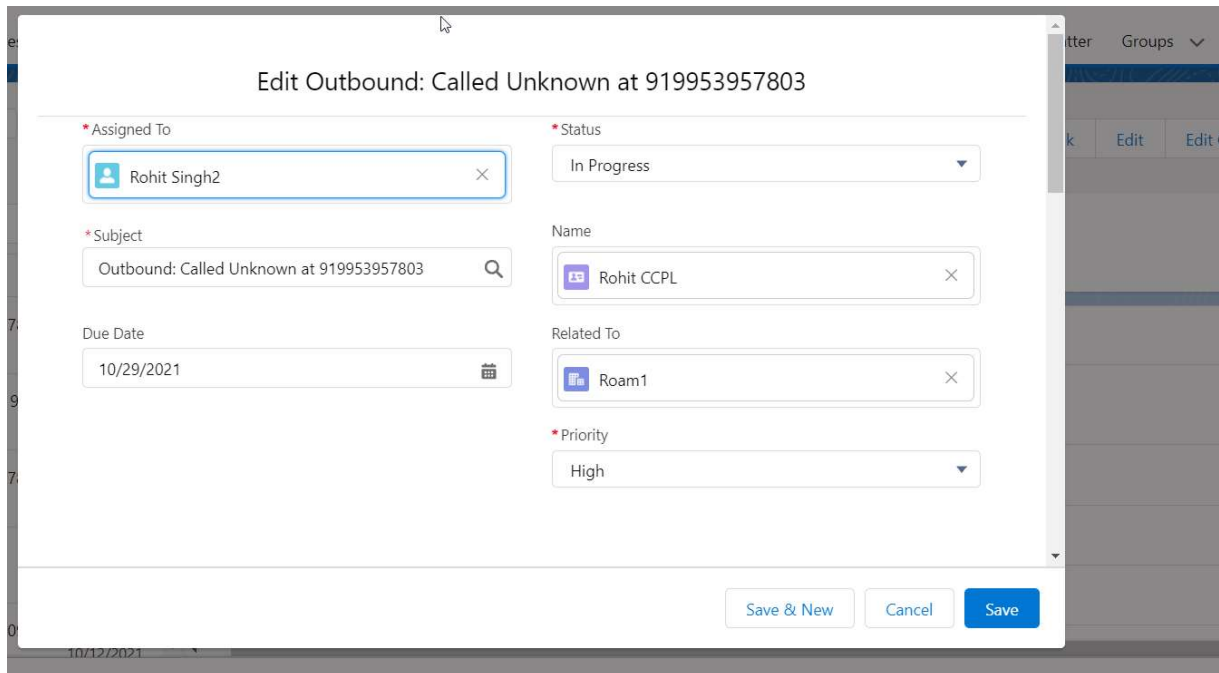
Save

## New Account

<input type="text" value="--None--"/>	<input type="text"/>
Annual Revenue	SIC Code
<input type="text"/>	<input type="text"/>
<b>Address Information</b>	
<b>Billing Address</b>	<b>Shipping Address</b>
Billing Street	Shipping Street
<input type="text"/>	<input type="text"/>
Billing City	Shipping City
<input type="text"/>	<input type="text"/>
Billing State/Province	Shipping State/Province
<input type="text"/>	<input type="text"/>
Billing Zip/Postal Code	Shipping Zip/Postal Code
<input type="text"/>	<input type="text"/>
Billing Country	Shipping Country
<input type="text"/>	<input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Save"/>	

<b>Additional Information</b>	
Customer Priority	SLA
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>
SLA Expiration Date	SLA Serial Number
<input type="text"/>	<input type="text"/>
Number of Locations	Upsell Opportunity
<input type="text"/>	<input type="text" value="--None--"/>
Active	
<input type="text" value="--None--"/>	
<b>Description Information</b>	
<input type="button" value="Cancel"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Save"/>	

**Edit:** This allows to edit all the details already saved in the task.



The screenshot shows a modal window titled "Edit Outbound: Called Unknown at 919953957803". The form contains the following fields:

- Assigned To:** A dropdown menu showing "Rohit Singh2".
- Status:** A dropdown menu showing "In Progress".
- Subject:** A text field containing "Outbound: Called Unknown at 919953957803".
- Due Date:** A date picker showing "10/29/2021".
- Name:** A dropdown menu showing "Rohit CCPL".
- Related To:** A dropdown menu showing "Roam1".
- Priority:** A dropdown menu showing "High".

At the bottom of the form, there are three buttons: "Save & New", "Cancel", and "Save".

**Edit Comment:** This is specific option just to edit comment part. Comments can also be edited using the Edit option.



The screenshot shows a modal window titled "Edit Comments" for the number "919953957803". The form contains the following elements:

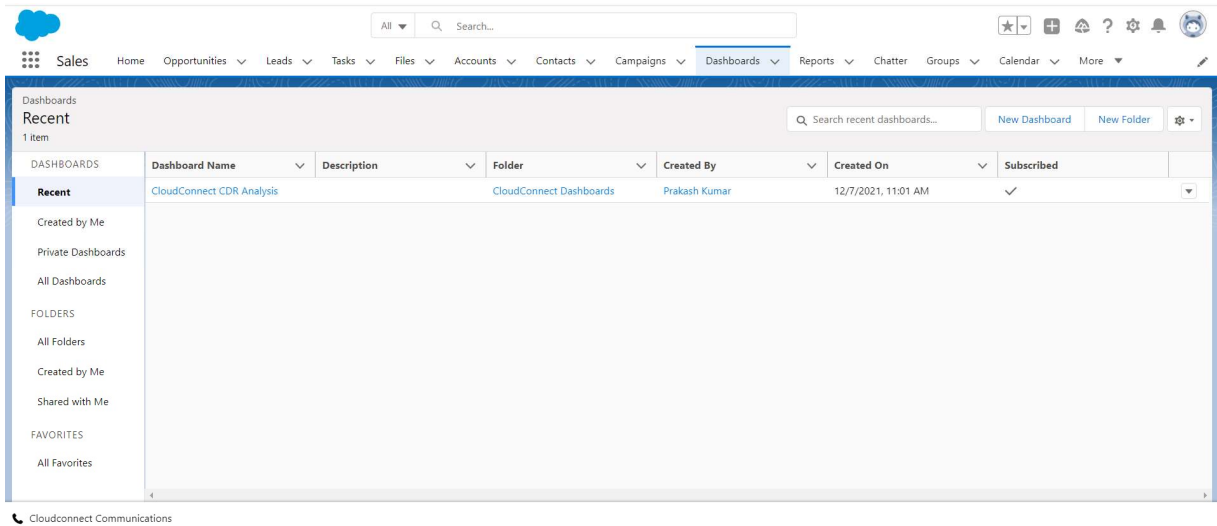
- Comments:** A text area containing "Test Comment".

At the bottom of the form, there are two buttons: "Cancel" and "Save".



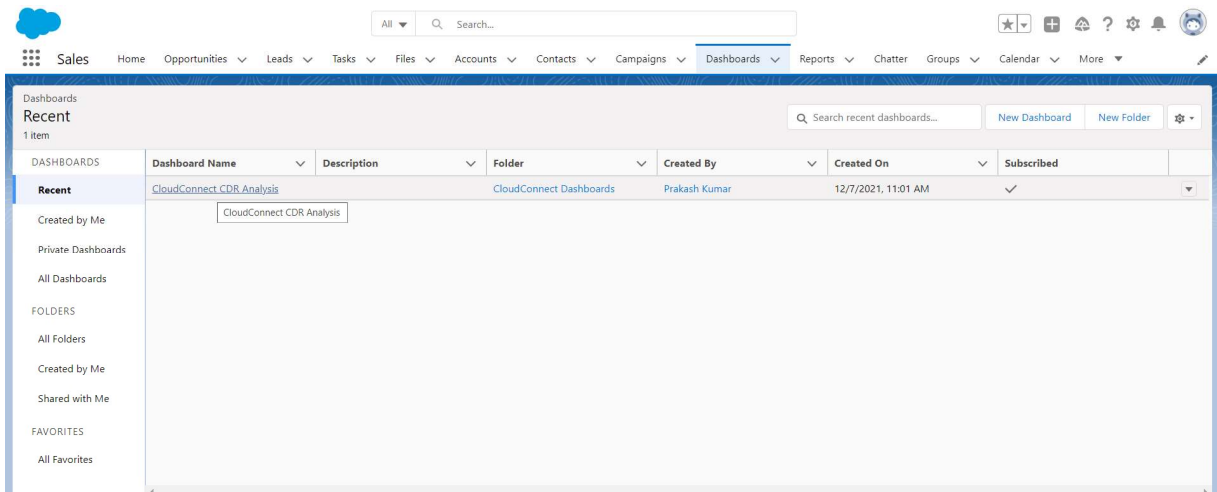
## Dashboard:

Go To Dashboard option and click on it

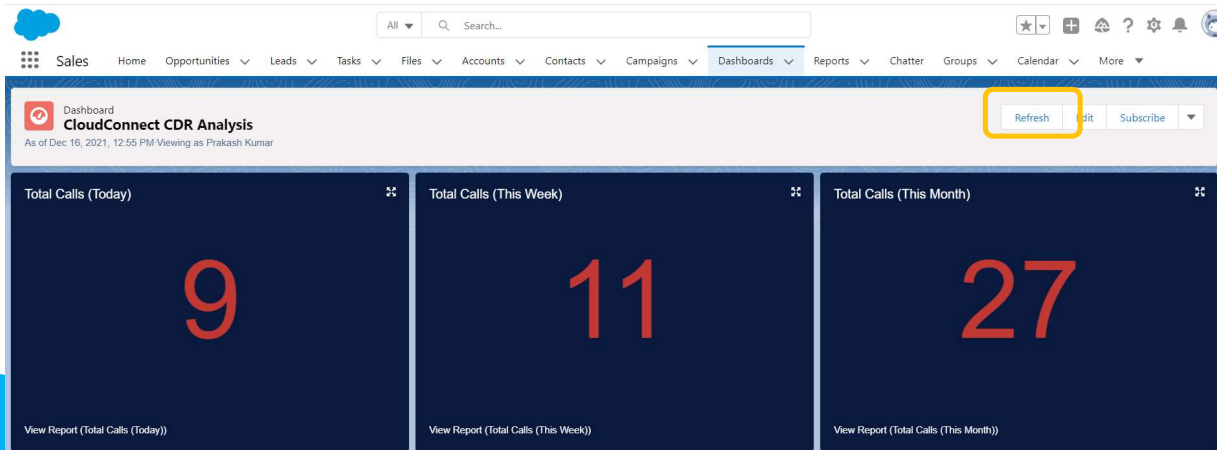


Cloudconnect Communications

To view, click on the highlighted link.



Real-time dashboard with below details, update dashboard data on clicking refresh tab

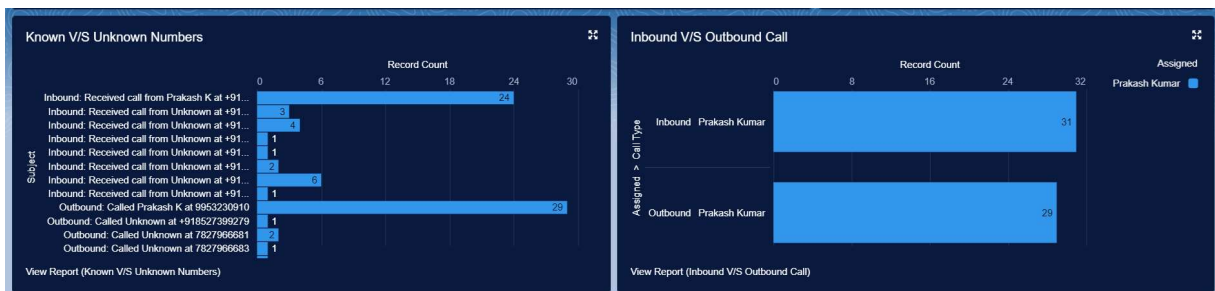
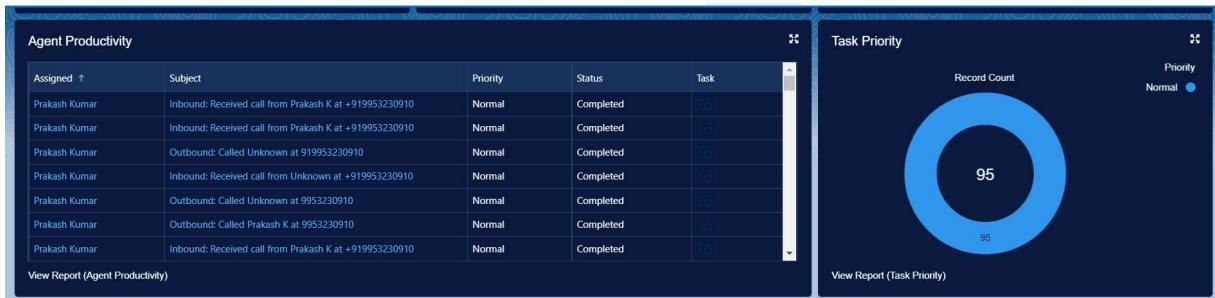


Dashboard  
**CloudConnect CDR Analysis**  
As of Dec 16, 2021, 12:55 PM Viewing as Prakash Kumar

Refresh Edit Subscribe

Metric	Value
Total Calls (Today)	9
Total Calls (This Week)	11
Total Calls (This Month)	27

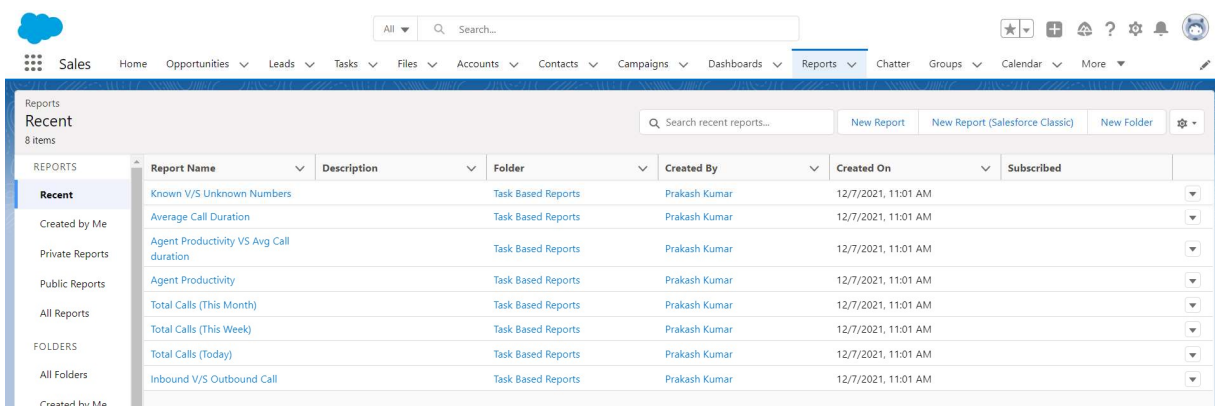
View Report (Total Calls (Today)) View Report (Total Calls (This Week)) View Report (Total Calls (This Month))



Cloudconnect Communications

## Reports:

Click on Report tab and will get the all the reports that has been created in the system.




## Telephony Integration with Salesforce Mobile Application


As part of the complete suite of services, CloudConnect also offer their telephony integration using click to call tab with Salesforce Mobile application (android & ios). This enables customer to make a call by using Click to Call tab from the mobile app.

In order to use, telephony integration with mobile app, certain configurations requires to be done during provisioning of services. Once the configurations are done, once can easily use the app as below-

Please go to **Play Store/ App Store** and download the Salesforce App

Please enter the username & Password to login the APP.

Log In 



Username

Password

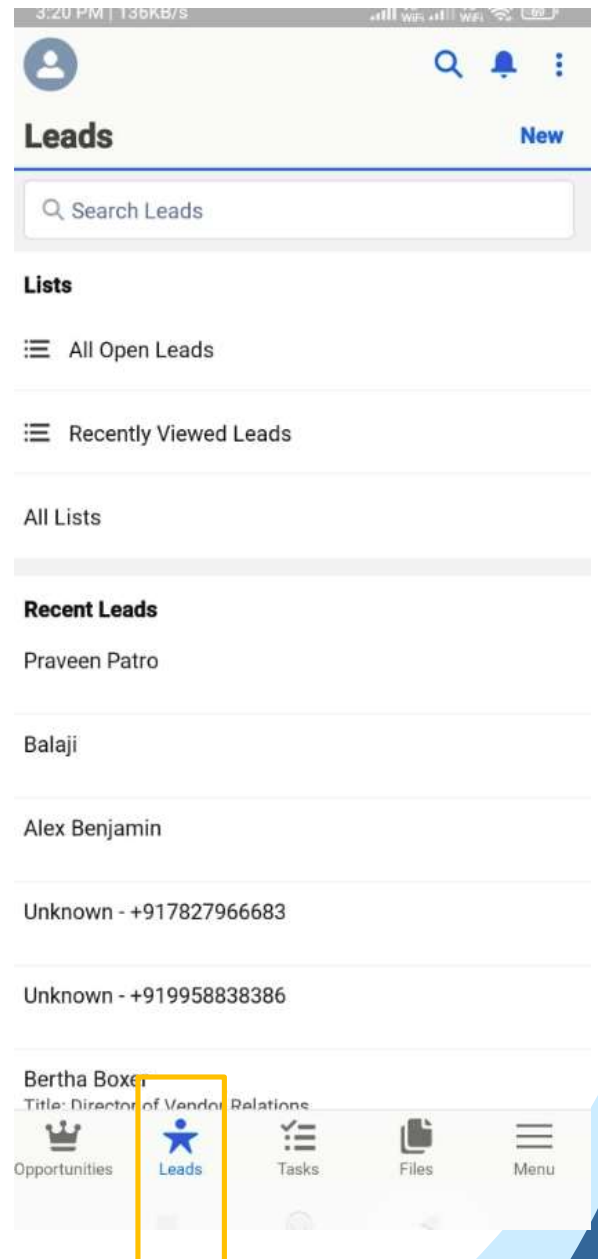
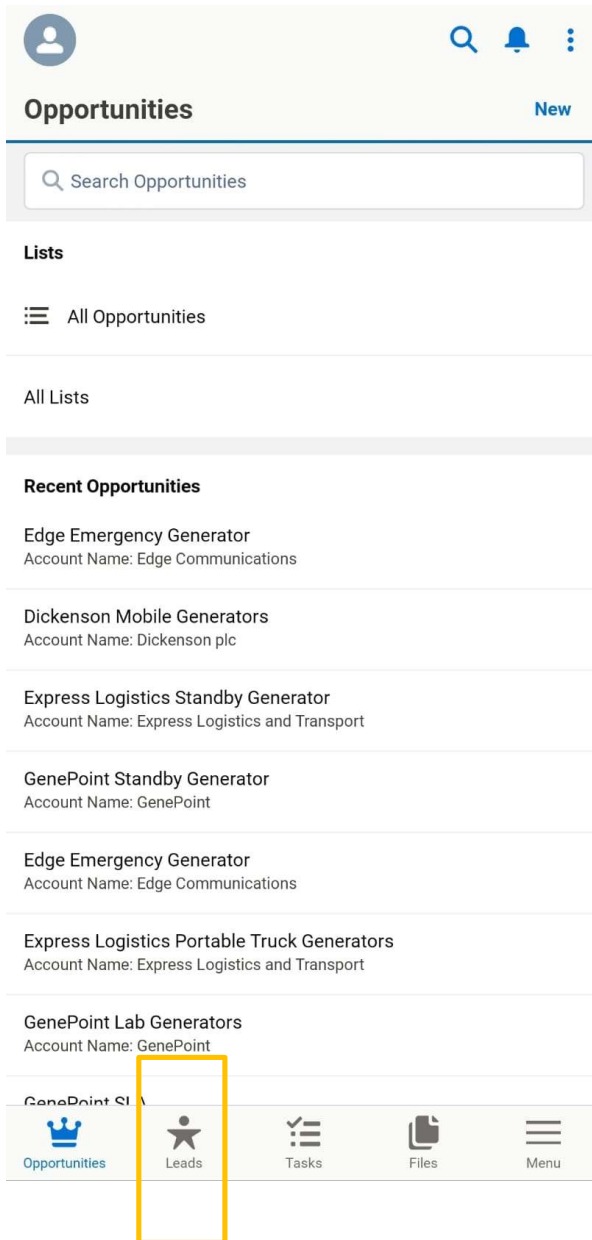
**Log In**

Remember me

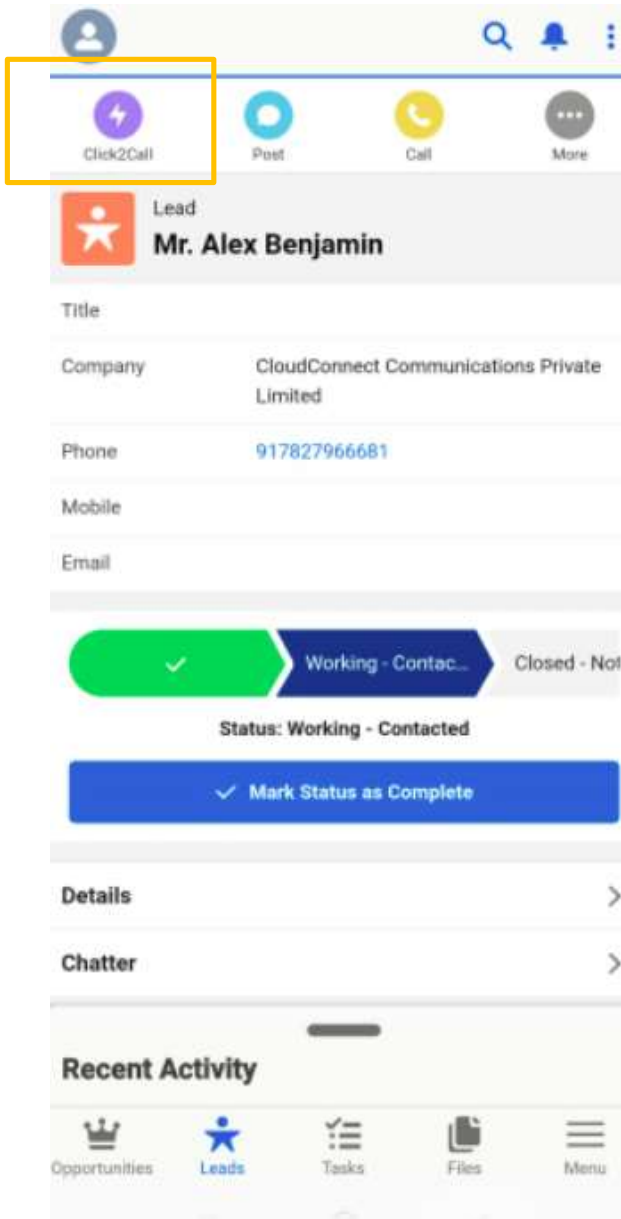
[Forgot Your Password?](#)      [Use Custom Domain](#)

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Once you are logged in, click on the “Leads” option to see the Lead details in the app

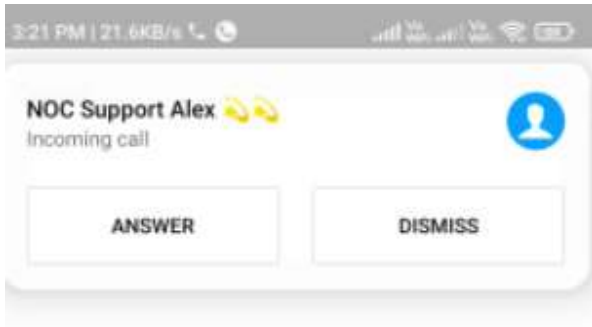


Click on any of the Lead to make a call. Once the page is loaded, you will see a new icon of “click2call” at the top of the screen. You are suggested to use only click2call icon to initiate the call. In case, you try to initiate a call by simple clicking on the number then it will take you to your native/GSM Dialpad.

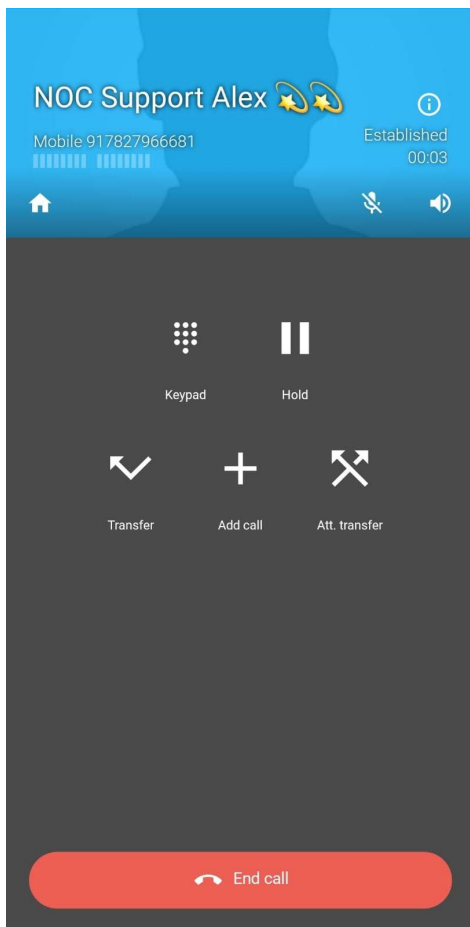


Once the call is initiated from salesforce application, the user will receive the incoming call on CloudConnect app or GSM as configured, on the same device.

The below image shows agent getting an incoming call on the CloudConnect app.

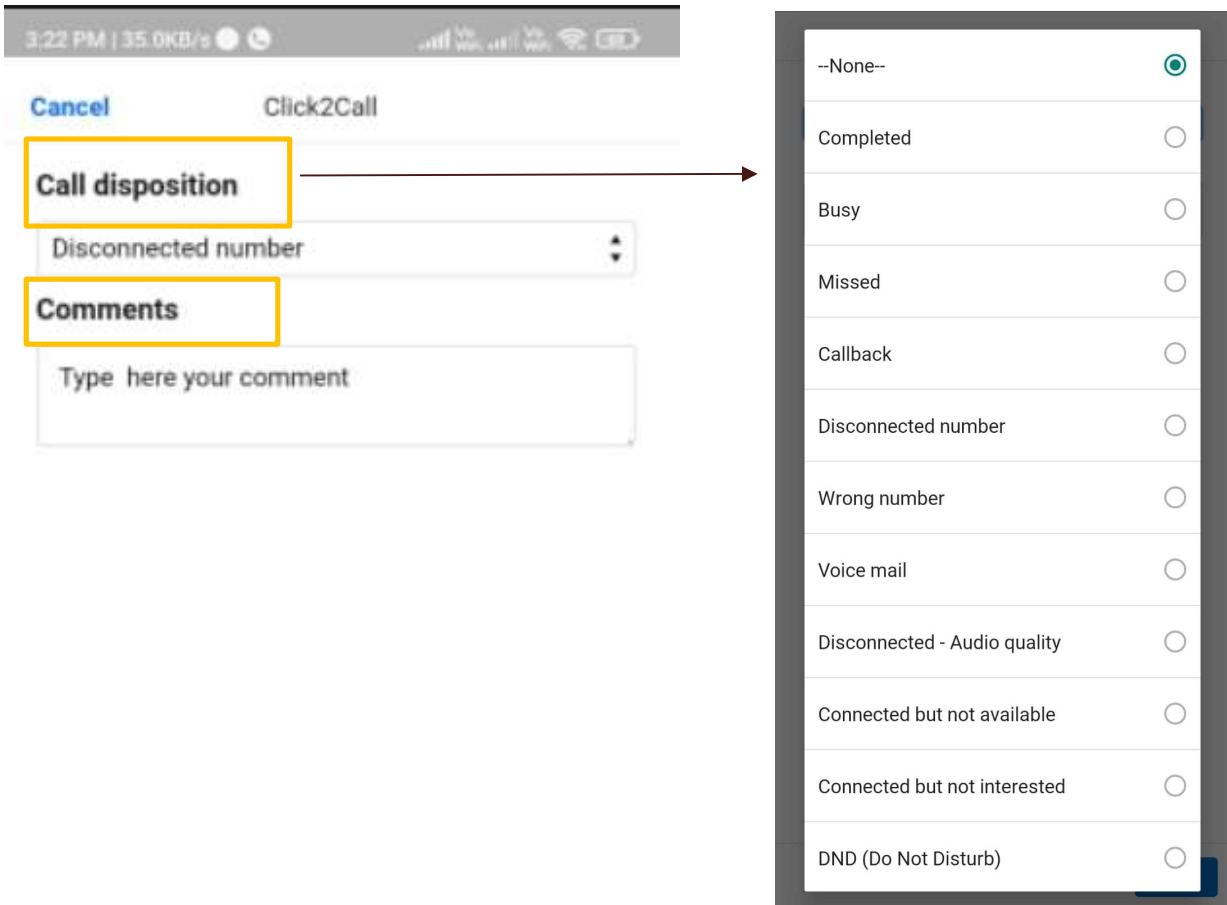


The agent receives the call on the app, it will have call controls as below.

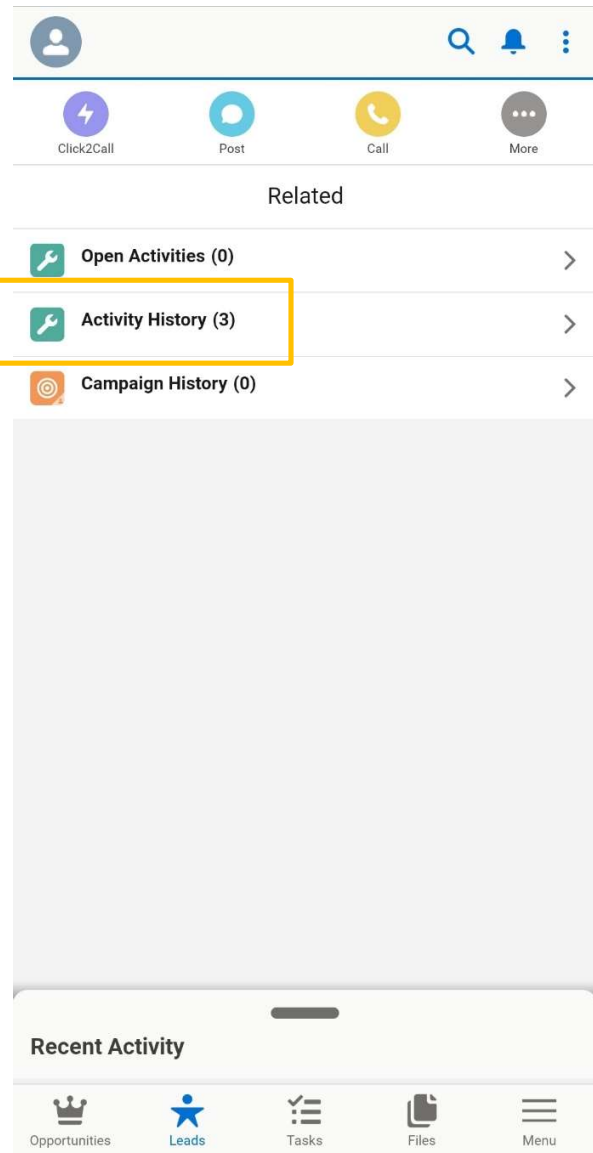
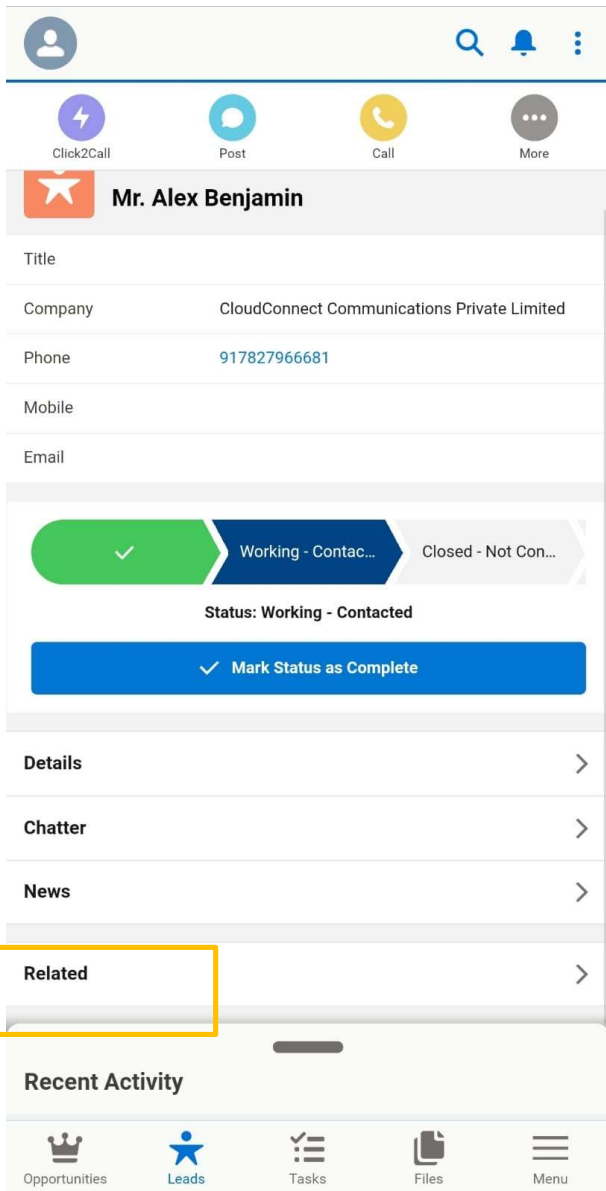


Once the conversation is concluded, the agent/customer disconnects the call, agent toggles to salesforce app on the mobile for call disposition.

Select the right disposition & enter the remarks before submission.



After the call disposition, one can check call history by visiting 'Related' Tab on the same Lead page, followed by Activity History.





Activity History  
3 items, sorted by Date, Last Modified Date/Time

- Outbound : Called Alex Benjamin at 917827966681** Today  
Assigned To: noc admin  
Last Modified Date...5/18/2022, 12:02 PM
- Outbound : Called Alex Benjamin at 917827966681** Today  
Assigned To: noc admin  
Last Modified Date...5/18/2022, 12:01 PM
- Outbound : Called Alex Benjamin at 917827966681** Yesterday  
Assigned To: noc admin  
Last Modified Date... 5/17/2022, 3:23 PM

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- Outbound : Called Alex Benjamin at 917827966681** Today  
Alex Benjamin

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