

MiCloud CRM Integrations

USER GUIDE

Release 4.0

Document Release 1.0

January 2018



NOTICE

The information contained in this document is believed to be accurate in all respects but is not warranted by Mitel Networks™ Corporation (MITEL®). Mitel makes no warranty of any kind with regards to this material, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose. The information is subject to change without notice and should not be construed in any way as a commitment by Mitel or any of its affiliates or subsidiaries. Mitel and its affiliates and subsidiaries assume no responsibility for any errors or omissions in this document. Revisions of this document or new editions of it may be issued to incorporate such changes.

No part of this document can be reproduced or transmitted in any form or by any means - electronic or mechanical - for any purpose without written permission from Mitel Networks Corporation.

TRADEMARKS

The trademarks, service marks, logos and graphics (collectively "Trademarks") appearing on Mitel's Internet sites or in its publications are registered and unregistered trademarks of Mitel Networks Corporation (MNC) or its subsidiaries (collectively "Mitel") or others. Use of the Trademarks is prohibited without the express consent from Mitel. Please contact our legal department at legal@mitel.com for additional information. For a list of the worldwide Mitel Networks Corporation registered trademarks, please refer to the website: <http://www.mitel.com/trademarks>.

© Copyright 2018, Mitel Networks Corporation

All rights reserved

MiCloud CRM Integrations
User Guide
Release 4.0
January 2018
Document Release 1.0

MiCloud CRM Integration User Guide	1
Get the Chrome extension	1
Log in to MiCloud CRM Integrations	2
Inbound calls with MiCloud CRM Integrations	3
Inbound call – Single contact match	3
Inbound call – Multiple contact match.....	4
Inbound Calls - No contact match.....	4
Taking notes with MiCloud CRM Integrations	5
Natural Language Processing Syntax	5
Making calls with MiCloud CRM Integrations	7
Click to dial in MiCloud CRM	7
Automatic call logging to your CRM	8
Getting support	9

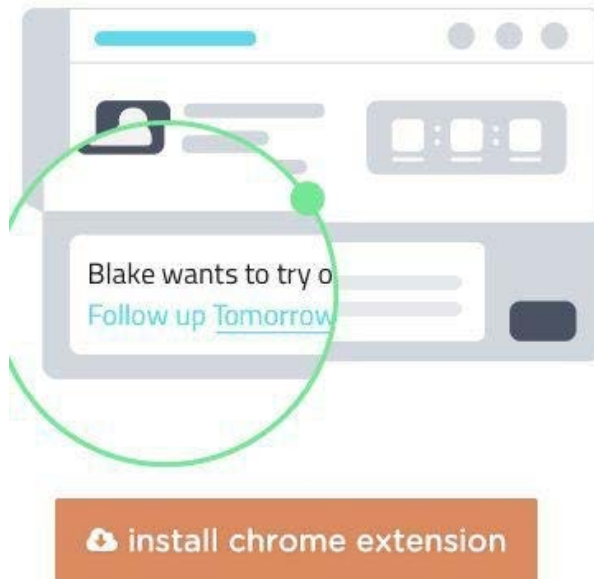
MiCloud CRM Integration User Guide

This guide describes how to log in and use MiCloud CRM Integrations with your in-house CRM application. MiCloud CRM Integrations allows you to make calls directly from your Chrome browser, with all functions integrated with the CRM you already use.

When your organization rolls out Mitel CRM Integrations, you will receive an e-mail including your MiCloud CRM credentials, and a link to install the Chrome extension.

Get the Chrome extension

Your welcome e-mail will direct you to download the Chrome extension.

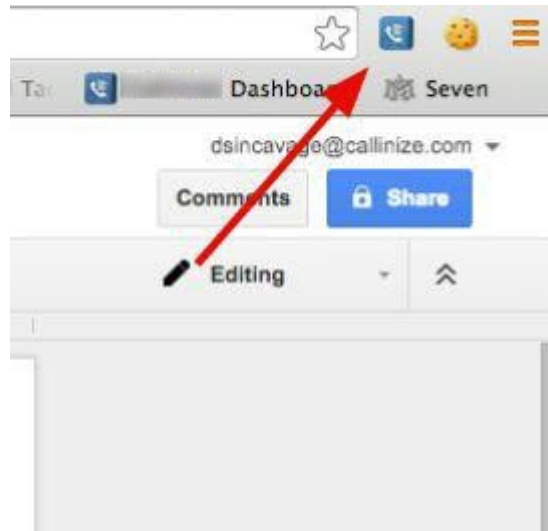


To install the Chrome extension:

1. Follow the link in the Welcome e-mail you receive from your IT department.
2. Click **install chrome extension**.
3. Follow the prompts to download and install the extension.

After the Chrome extension is installed and you are logged in, you will see a blue phone icon in the top right corner of your browser.

Under normal conditions, you will remain logged in until you specifically log off, or until you change your PC.



Note: If the phone icon is gray, this means that you are not currently logged in to the MiCloud CRM Integrations dashboard. Upon logging in, the icon will display in blue again.

Log in to MiCloud CRM Integrations

After you have installed the Chrome extension and chosen a password, you can log in any time.

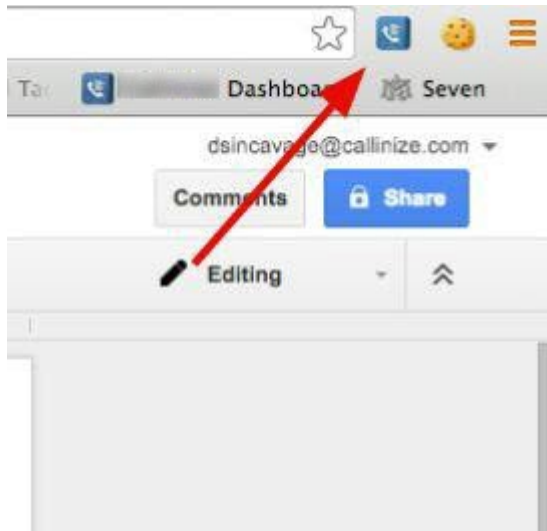
To log in to MiCloud CRM Integrations:

1. Navigate to <https://crmintegrations.mitel.com>.

Note: Log in using a Chrome browser.

2. Enter your user name (usually this will be your e-mail address) and password at the prompts.
3. Click **Login**.

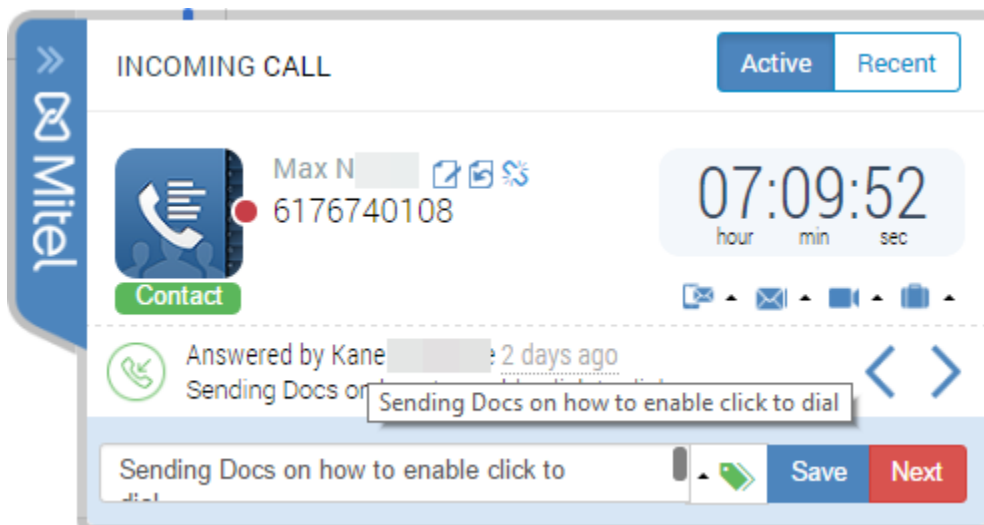
You will remain logged in until you log out or change computers. When you are logged in, the phone icon is blue.



Inbound calls with MiCloud CRM Integrations

Inbound call – Single contact match

When a call comes in, MiCloud CRM Integrations uses the incoming phone number and searches against all of the phone number fields for every record in your CRM. When there is a single matching record inside of the system, you will see a pop-up that contains the name of the contact who is calling, the name of the account they are linked to, and all of the recent interaction history with that individual.



The following notes describe the information available in the pop-up. Note that the features available on your pop-up depend on the features purchased by your company. The following describes some of the basic features.

- Click the name of the contact to open the contact record in your CRM.
- Click the name of the account to open the account record in your CRM.
- The dot on the right edge of the phone icon (red in the screen capture above) indicates the state of the call:
 - Yellow - Call is ringing (not yet answered)
 - Green - Call is connected
 - Red - Call has ended
- The timer display indicates the length of time the call has been (or was) connected. It stops counting when the call ends. The call duration is automatically logged in the CRM, for reporting purposes.
- The call notes near the bottom of the display allows you to see the activity history. You can scroll through all of the recent interactions that anyone at your company has had with the lead, contact, or account. For each past activity, you will be able to see the type of activity, the person on your team who took the call, when call occurred, and any notes recorded during each interaction. Hover your mouse over this section to see the full notes from each activity.
- You can add notes in the text section at the bottom of the pop-up window: “Click here to add notes.” If you don’t add notes, the call is still logged in the CRM with the comment “Automatically Logged by MiCloud CRM Integrations” If notes are taken, the comment section will contain the full notes that you (or the person who answered the call) took while on the call and the subject line will contain the beginning of those notes for easy reference when looking at activity history on a record.

Inbound call – Multiple contact match

In some cases, there will be multiple different records that match the phone number of the person who is calling you. In these cases, MiCloud CRM Integrations displays all of the matching records.

Use the text box provided to filter the results by contact name or account name. When you find the correct match, click the circle next to the record you want and the single match screen will appear.

Inbound Calls - No contact match

Sometimes you receive calls from a number that does not yet exist in your CRM. The pop-up window displays “No Match Found”. There are typically two scenarios in which you will see this message:

- The person does not exist in your system. This is a new contact.

- The person exists in the CRM, but they are calling from a number that is not yet attached to their account.

To determine which of these cases it is, you can search for an existing match. Start typing the name of the contact, lead, or account:

As shown in the example, if the correct company is shown, click the circle next to the account name to add the new phone number to the record. Then the single match screen for that account is displayed.

If the company shown is not the correct company, use the buttons at the bottom right corner to create a new lead, contact, or account directly from the pop-up.

Taking notes with MiCloud CRM Integrations

Once you are on a call, whether it is an inbound call or an outbound call, you can take notes for that call that will be saved in the comment section of the call activity record. These are the notes that will show up the next time the lead, contact or account calls or is called (by you or by one of your colleagues).

To take notes, click on the notes section and type your notes (see below).

When taking notes, you can use the task creation feature that uses natural language processing to identify your intent to follow up with someone at a specific time.

You can type “Follow up on 12/3”, for example. MiCloud CRM automatically creates a new task to remind you to follow up on December 3rd.

Rather than type a full note, you can also use the MiCloud CRM Integrations Natural Language Processing feature; described in the next section.

Natural Language Processing Syntax

MiCloud CRM Integrations provides a Natural Language Processing feature that allows you to use a kind of “short hand” to create notes and follow-up tasks

Recognized action phrases include:

- Call
- CB (call back)
- Follow up
- Task
- Remind/ Remind me/ Remind me to call

- Retry
- Try again
- Assign to

For example, MiCloud CRM Integrations recognizes the following phrases, typed into the Notes:

- Remind me Tomorrow
- Remind me on Saturday.
- Remind me in 1 week
- Remind me next month
- Remind me on Wednesday
- Call 01/29/2016
- Follow up 1/29/2014
- Follow up in two weeks
- Follow up in a week
- Follow up next week
- Call tomorrow
- Call before COB. ...your notes...
- Call at beginning of next year.
- Call beginning of next month
- Call beginning of next week.
- Retry tomorrow.
- Try Again tomorrow.

You can let colleagues know about a contact interaction, either to notify them or to assign an action to them.

In your note, use the @ symbol to tag someone for an action; for example, @smith@acme.com. The individual copied on the note will receive an e-mail. They can use the link in the e-mail to immediately access the record for more information, or to take the action that has been assigned to them.

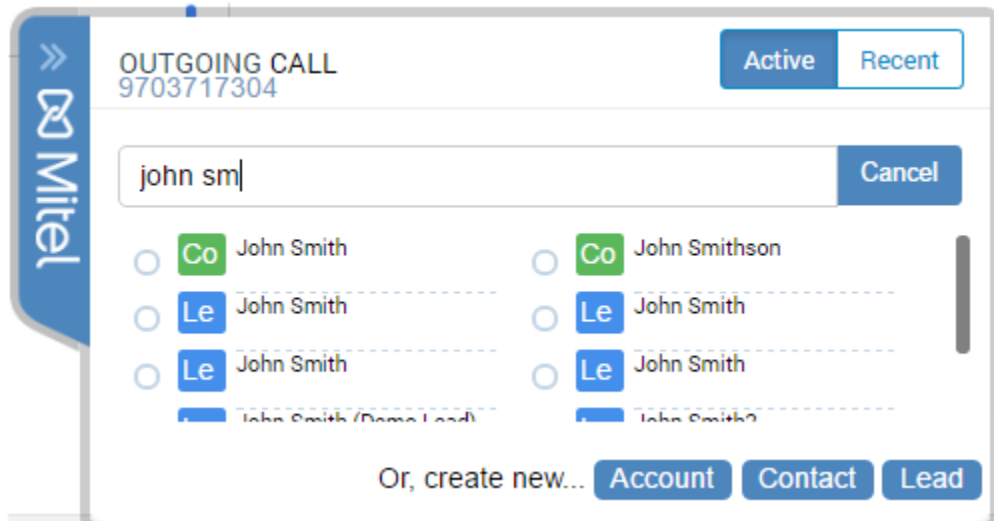
After the call has been completed, the pop-up screen will stay open to allow you to finish your notes. When you have finished making your notes, save the notes by clicking **Save** button in the bottom right corner of the popup. After the notes are saved, a notification window is displayed.



Notes Saved ×
 Notes have been saved with all your dispositions.

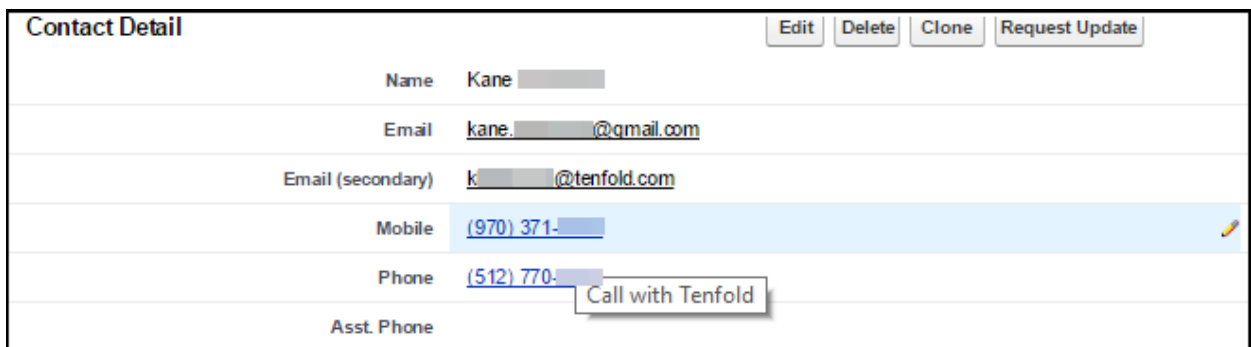
Making calls with MiCloud CRM Integrations

When an outbound call is placed, either through Click-to-Dial or by manually dialing a phone number, a pop-up window appears, just as for inbound calls. The matching and filtering features work in the same way as described for inbound calls.



Click to dial in MiCloud CRM

To dial outbound calls, click a phone numbers on any page in your browser. Here is an example from inside a CRM record:



Note that all of the phone numbers show as clickable links. The same applies for phone numbers on any browser tab.

When using click-to-dial, MiCloud CRM Integrations recognizes the context in which you click on a phone number. If there are multiple records in the system with the same phone number, you will automatically call the correct match in that record.

Automatic call logging to your CRM

Calls are automatically logged to your CRM, even if you don't take notes or interact with the pop-up dialog boxes. Calls with no notes are logged as completed activities on the correct contact or account record.

The screenshot displays a CRM interface for a task detail. At the top, there is a navigation link "[Back to List: Opportunities](#)" and an "Attachments" icon. Below this are buttons for "Edit", "Delete", "Create Follow-Up Task", and "Create Follow-Up Event".

The main content is organized into sections:

- Related To:** Shows "Name" as Kane [redacted] and "Related To" as Tenfold. It also includes fields for "Call Recording" and "Support Items".
- Task Information:**
 - Type: Call
 - Assigned To: Kane [redacted]
 - Subject: OBC: Kane is reviewing current proposal and needs to t...
 - Date Time: 9/19/2016 4:42 PM
 - Comments: Kane is reviewing current proposal and needs to touch base next week. Follow up on 123. CC @ [redacted]@tenfold.com
 - User Ext.:
 - Due Date: 9/19/2016
 - Status: Completed
 - Priority: Normal
 - Call Outcome:
 - Call Purpose:
- Call Information:**
 - Call Duration: 27
 - Call Type: Outbound
 - Call Inbound Extension: [redacted]
 - Phone: [\(512\) 770-9118](tel:(512)770-9118)

The logged activity automatically displays the related record, the type of activity (Call), who made or received the call (Assigned to: Kane Laramore), the notes from your call (See comments section), the date of the call (9/19/2016), the duration of the call in seconds (Call duration: 27), and the direction of the call (Call Type: Outbound)

The subject line contains "OBC" for Outbound Call, or "IBC" for Inbound Call, and the notes are included, up to the character limit, for easy reference when looking at activity history.

With all of this information automatically logged, your organization can set up custom reports in your CRM using these fields.

Getting support

Contact your local administrator or IT department or send an email to Mitel Support at crmintegrations_support@mitel.com.

