Engage CRM integration

Engage Voice

Admin Guide

For more information, visit our support site.

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Intro to Engage CRM integrations

Engage Customer Relationship Management (CRM) integrations will allow users to make calls while staying inside their CRM. Engage supports Microsoft Dynamics, Zendesk, SugarCRM, ServiceNow, Bullhorn, and NetSuite.

The Engage CRM integrations will help deliver a seamless, consistent, and efficient service experience for Engage users using their respective CRMs as their working platform. This integration helps agents because they will not have to leave their CRM to use Engage controls, such as taking or making calls.

Features and benefits of Engage integration

Here are some key features and benefits of Engage CRM integrations:

- Allows agents assigned to the Engage CRM integration to log in using Single Sign-on (SSO)
- Allows agents to set their agent state
- Flexible agent connection (can use any phone number or RingCentral Phone)
- Custom 'not ready' agent states
- Persistent voice connection
- Call history
- Notes from the Engage CRM integration will sync with the CRM database
- Custom disposition codes at wrap-up
- Transfer calls within the integration app
- Allows click-to-dial inside the CRM
- Caller info screen pops on inbound and outbound calls
- Ability to take notes and create tasks from the integration app
- Matches inbound calls with CRM records based on ANI
- Allows basic outbound calls

Accessing Engage CRM integration

To use the integration, you must be an existing Engage Voice customer. Then you need to purchase the CRM integration feature before it can be enabled in your account.

Installing and setting up an Engage CRM integration

Before you can connect your Customer Relationship Management (CRM) to the Engage CRM integration portal, you need to have access to the integration feature. This means requesting the Engage CRM integration feature with your CSM. Once your request has been approved, you'll receive a confirmation email with a link to the Engage CRM integration portal, where you'll change your password and go through the onboarding wizard.

Keep in mind that depending on your CRM, you could either have an embedded UI where Engage is directly embedded in your CRM, or a Chrome extension where Engage is installed as such.

Integrating a CRM to Engage via the onboarding wizard

After you've configured your CRM, you can now go through the onboarding wizard. Remember that you can only go through the wizard once through your initial onboarding. If it's your first time accessing the Engage CRM integration portal, you'll be asked to set up your password.

The onboarding wizard has four pages that you need to configure. Follow the steps below to integrate your CRM with Engage.

Organization page

The first page is the organization page. To set up the configuration on this page, follow these steps:

1. Under **Organization credentials**, check your company name and who is listed as **Owner**. **Owner** should be the primary admin.
2. Click **Save and Continue**.
3. Select your environment.
4. Click **Continue**.
5. Click **Begin Test**.
6. You will be redirected to a testing site. Enter your credentials to log in.
7. In the **Access Request** prompt, click **Authorize**.
8. After the successful testing, click **Continue** at the bottom right.

Phone Systems page

The second page is the Phone Systems page. Here you will connect your Engage Voice account or your phone system, as well as your CRM to the Engage CRM integration. Follow these steps:

1. Select your environment under the **Select Your Environment** dropdown menu.
2. Click **Continue** at the bottom right.
3. Review your credentials and click **Begin Test** at the bottom right. You will be redirected to the Engage Voice login site.
4. Enter your CRM credentials for authorization. You will be redirected back to the Engage CRM platform.
5. Select your CRM.
6. Click **Continue**.
7. Review your credentials and click on **Test Connection** at the bottom right.
8. Enter your CRM credentials for authentication.

9. Click **Continue** after you've been authenticated and redirected back to the Engage CRM platform.

Please note that your CRM credentials configuration options will depend on your CRM.

CRM Page

The third page is the CRM page where you will synch your users. Follow these steps:

1. Select your CRM under **Select your source(s) to begin synching users**.
2. Click on **Sync** at the bottom right.
3. In the modal window prompt, click **Continue**.

Users page

Lastly, the fourth page is the Users page where you will see in real-time your CRM synchronizing with the Engage CRM integration. Depending on the number of users, this may take several minutes. If there's an error with the synching, click on **What happened?** next to the item with an error, and a modal window with details of the error will popup.

Click **Sync Again** in the bottom right to sync again; otherwise, click on **Finish Setup** at the upper right.

You may also see an option that reads 'I have either configured the Sync users filtering feature or it isn't required for my organization.' Select the checkbox if it applies to you, then click on **Continue**. Either way, when successful, you will be redirected to the customer admin dashboard.

After you've gone through the onboarding wizard, you may proceed to Configuring Agent Status and Configuring Advanced Workflow for ANI screen pop to finish your installation, or read Integrating a CRM to Engage via the Engage CRM integration portal if you were unable to go through the wizard.

Integrating a CRM to Engage via the Engage CRM integration portal

If the onboarding wizard is unavailable to you, you can still establish the initial connection from the Engage portal to your CRM. Follow these steps to do so:

1. Go to engage.tenfold.com and log in using your credentials.
2. Select **Company settings** in the top navigation bar.
3. Select CRM in the sub-navigation bar that will appear under the top nav bar.
4. Select your CRM listed under the first dropdown menu.
5. Enter your CRM specific settings in the fields that follow.
6. Click **Save**.

Depending on your CRM, the settings you must configure will also change. Different CRMs have different authentication settings. Go to your CRM's respective setting up article to learn more.

Upon clicking save, if the information provided is correct, Engage CRM integration will test the connection and present a success message.

After following the steps above, proceed to Configuring Agent Status and then to Configuring Advanced Workflow for ANI screen pop to finish your installation.

Configuring Agent Status

After you've connected both your phone system and your CRM to the Engage CRM integration portal, you will be redirected to the admin dashboard. Here, you will have to configure features relevant to your organization. The options and fields may vary depending on your selected features.

Regardless of the features you want to customize, you will have to enable Agent Status. To proceed, follow these steps:

1. Select **Features** in the top navigation bar.
2. Select **Agent Status** in the sidebar.
3. Locate the **Status Mapping auto-provisioning** setting under the **Settings** section.
4. Check the **Enabled** checkbox.
5. Click **Save** at the far right of the **Status Mapping auto-provisioning** setting.

Configuring Advanced Workflow for ANI screen pop

Engage CRM integration allows your CRM to automatically screen pop any contact when the ANI or caller matches records. Contacts, leads, and accounts all have the same advanced workflow configuration. We are going to use the Advanced Workflow 'onCall' trigger to screen pop caller-to-record matches. Follow the steps below.

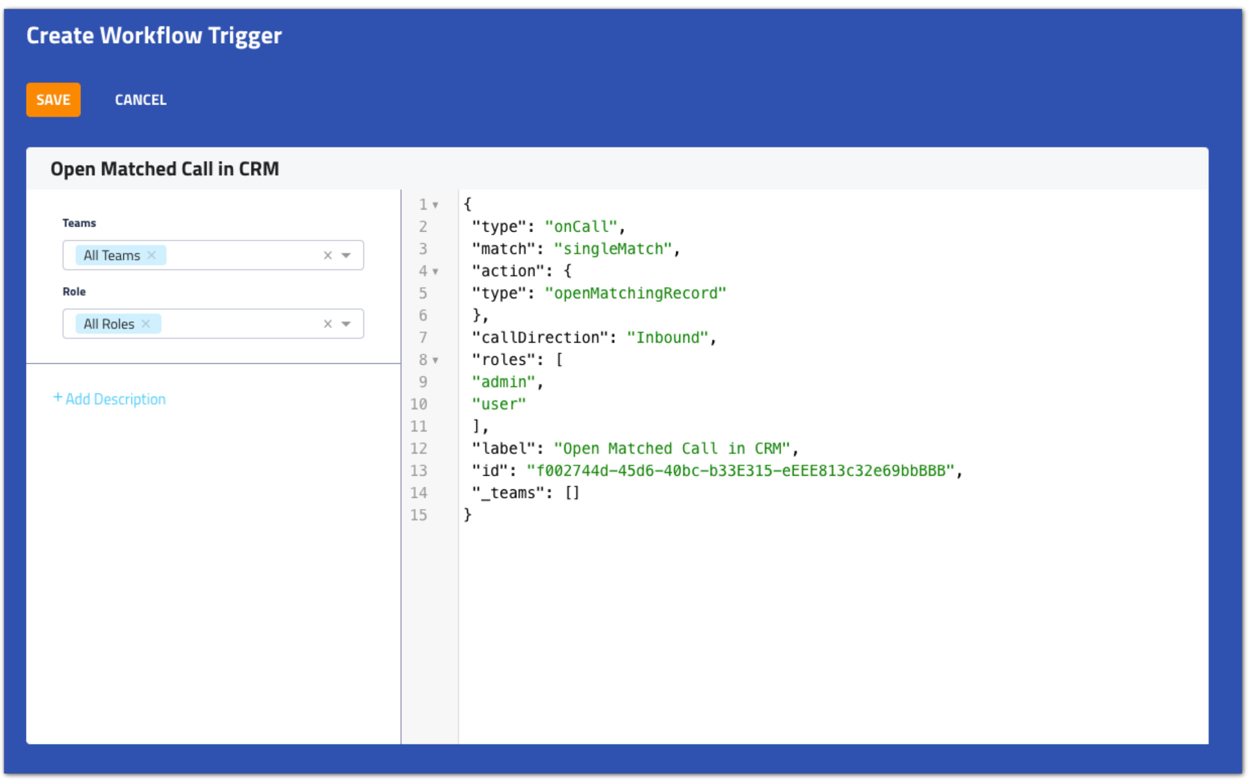
1. Select **Features** in the top navigation bar.
2. Select **Advanced Workflow** in the sidebar to go to its configuration settings page.
3. Click on the red **Disable** button in the upper right corner to enable Advanced Workflow.
4. Click on the **Manage Workflows** button to go to the Advanced Workflow page.
5. Click on the **Create New Workflow** button at the right hand side of the page to open the **Create Workflow Trigger** page.
6. Select the teams you want included in this workflow from the **Teams** dropdown.
7. Select the roles you want included in this workflow from the **Roles** dropdown.
8. Copy the value for 'id' in the JSON editor in the center of the page.
9. Replace the code in the JSON editor with the code below.

```
{
 "type": "onCall",
```

```
"match": "singleMatch",
"action": {
  "type": "openMatchingRecord"
},
"callDirection": "Inbound",
"roles": [
  "admin",
  "user"
],
"label": "Open Matched Call in CRM",
"id": "YOUR ORIGINAL ID VALUE",
"_teams": []
}
```

Replace “YOUR ORIGINAL ID VALUE” with the value you copied in step 8. Please note that the value should be inside quotation marks.

10. Click Save in the upper left corner.



Installing the Engage CRM Chrome extension

Instead of an embedded UI, some CRMs will use the Chrome extension. Functionality will be the same, but the CRM integration app will be a floating Chrome extension. To install the extension, follow these steps:

1. Download the Chrome extension zip file, to be provided by professional services.
2. Unpack the zip file in its own folder.
3. In your Google Chrome browser, click on the **Menu** icon at the upper right.
4. Navigate to **More tools > Extensions** and toggle Developer mode in the upper right corner.
5. Click the **Load unpacked** extension button.
6. Navigate and select the folder where you downloaded and unpacked the Chrome extension zip file.
7. Click on **Select Folder/Select**.
8. Once it appears in the Extensions page, toggle the switch at the bottom right of its tile to enable.