

Knowlarity's Super Receptionist for Leadsquared CRM - Mobile Cloud Connector

Admin Guide

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About Super Receptionist for Leadsquared CRM

Integrating SuperReceptionist with Leadsquared CRM unlocks advantages which streamline sales communications while providing sales reps with access to a wide range of valuable data. The integration helps manage all the functionalities of a powerful contact center right inside Leadsquared applications.

SuperReceptionist connector in Leadsquared CRM allows you to:

- Track incoming calls from customers
- Create leads with phone numbers
- Make outbound calls using Click-to-Call feature
- Create tasks for calls

About this Guide

This guide is specifically designed for users of Super Receptionist CTI for Leadsquared CRM with Mobile Cloud Calling Connector. This admin guide will show you how to configure the connector, how to use this application and provide known issues/limitations of the application as well as some basic troubleshooting questions and answers.

Requirements

1. Super Receptionist Advance and higher plan with CLI Numbers
2. Leadsquared plan which supports telephony integration
3. Leadsquared CRM mobile application (Android or IOS)
4. Leadsquared Call and SMS Tracker application for Android ([link](#))
5. Leadsquared & Super Receptionist admin credentials
6. To enable the Leadsquared Mobile Cloud Calling Connector, please write to support@leadsquared.com or reach out to your Leadsquared Customer Success Executive.
7. Leadsquared UTC connector should be configured for call log push

Limitations

1. OBDCC Calls are not supported as the customer phone number is not known by the time agent receives the call and hence call popup cannot be shown
2. Inbound call pop up might fail intermittently if the Leadsquared calls our API even before the originate event comes

APIs

1. Click to Call API

Method: GET

URL: <https://konnnect.knowlarity.com/konnnect/makecall/>

Parameters:

API Parameter	Mandatory?	Description	Leadsquared parameters	Sample
api_key	Yes	Get you SR API key from SR > Settings > Call Flow > Plan setting > API KEY		232kn4njancdl234j24nl23jnf2w2
knumber	Yes	SR Number from your SuperReceptionist plan in E164 format	@{User:mx_Custom_8,}	+9180284242984
integration	Yes			leadsquaredV2
customer	Yes	Phone number to be dialed to in E164 format	@{Lead:Phone,}	+919423492429
agent	Yes	Phone number of the agent in E164 format	@{User:PhoneMain,}	+918429482044
caller_id	No	Virtual caller id number from your plan in E164 format	@{User:mx_Custom_8,}	+918042424224
country_code	Yes			IN
source	Yes			mobileapp
lead_id	Yes	Lead id in Leadsquared CRM		k13k2lj32l3l2
user_id	Yes	User id in Leadsquared CRM		h42k3k23j23j2

- Integration, country_code and source parameters have fixed values shown in Sample
- Leadsquared parameter @{User:mx_Custom_8,} can take any custom field like @{User:mx_phoneNumber,}

2. Incoming Agent Popup API

Method: GET

URL: <https://konnnect.knowlarity.com/app/v2/getCustomer>

Header:

Key	Value	Description
Authorization	SR API Key	Get you SR API key from SR > Settings > Call Flow > Plan setting > API KEY

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Parameter:

API Parameter	Mandatory?	Description	Leadsquared parameters	Sample
agent_number	Yes	Phone number of the agent in E164 format	@{User:PhoneMain,}	+918429482044

3. Get CLI Numbers API
Method: GET
URL: <https://konnnect.knowlarity.com/app/v2/getclinumbers>
Header:

Key	Value	Description
Authorization	SR API Key	Get you SR API key from SR > Settings > Call Flow > Plan setting > API KEY


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








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Configure Mobile Cloud Calling Connector

1. Login to Leadsquared web application from <https://login.leadsquared.com/>
2. Create a custom field “virtualNumber” in the user module where the virtual number (DID) has to be stored.

User Fields 
Manage and customize user custom fields


Create

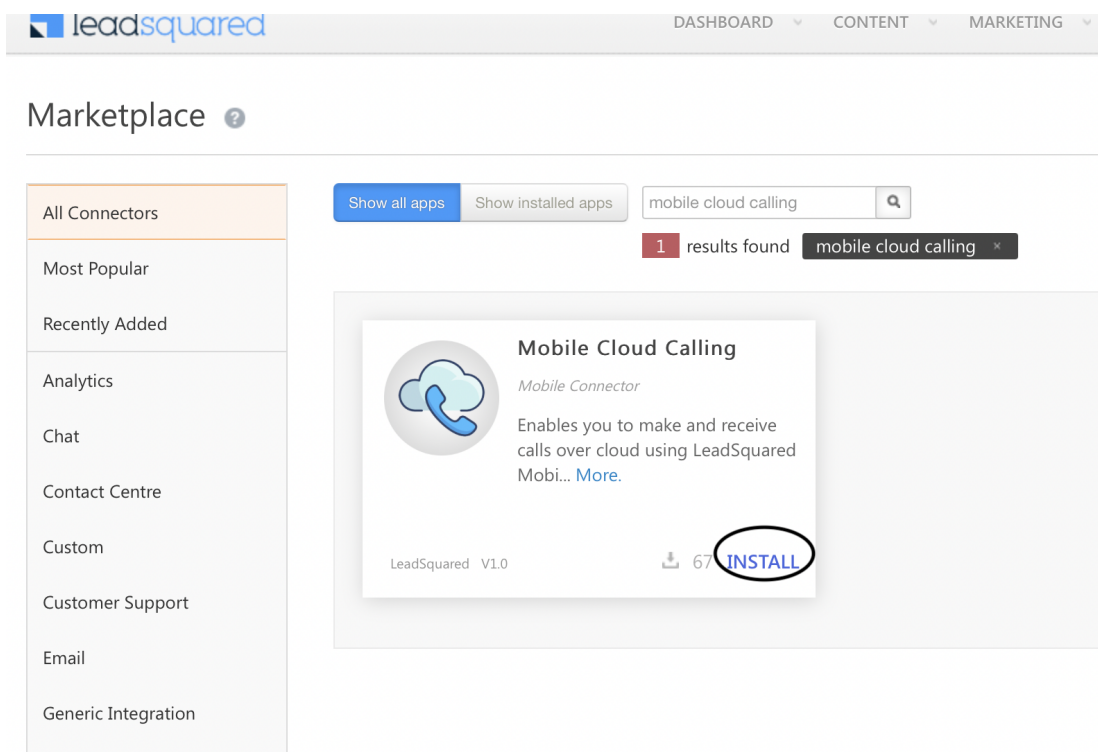
Field Display Name ↑	Schema Name	Type	Is Mandatory	Is Editable	Actions
agentNumber	agentNumber	Text	No	Yes	
Custom 1	mx_Custom_1	Text	No	No	
Custom 10	mx_Custom_10	Text	No	No	
Custom 2	mx_Custom_2	Text	No	No	
Custom 3	mx_Custom_3	Text	No	No	
Custom 4	mx_Custom_4	Text	No	No	
Custom 5	mx_Custom_5	Text	No	No	
Custom 6	mx_Custom_6	Text	No	No	
Custom 7	mx_Custom_7	Text	No	No	
Custom 8	mx_Custom_8	Text	No	No	
Custom 9	mx_Custom_9	Text	No	No	
Gender	mx_Custom_Gender	Dropdown	No	No	
PhoneNumberWithCountryCode	PhoneNumberWithCountryCode	Text	No	Yes	
virtualNumber	mx_Custom_virtualNumber	Text	No	Yes	

3. Goto Leadsquared > APPS > Apps Marketplace. Search for Mobile Cloud Calling and install it.

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leadSquared DASHBOARD CONTENT MARKETING

Marketplace ?

All Connectors
Most Popular
Recently Added
Analytics
Chat
Contact Centre
Custom
Customer Support
Email
Generic Integration

Show all apps Show installed apps
1 results found mobile cloud calling



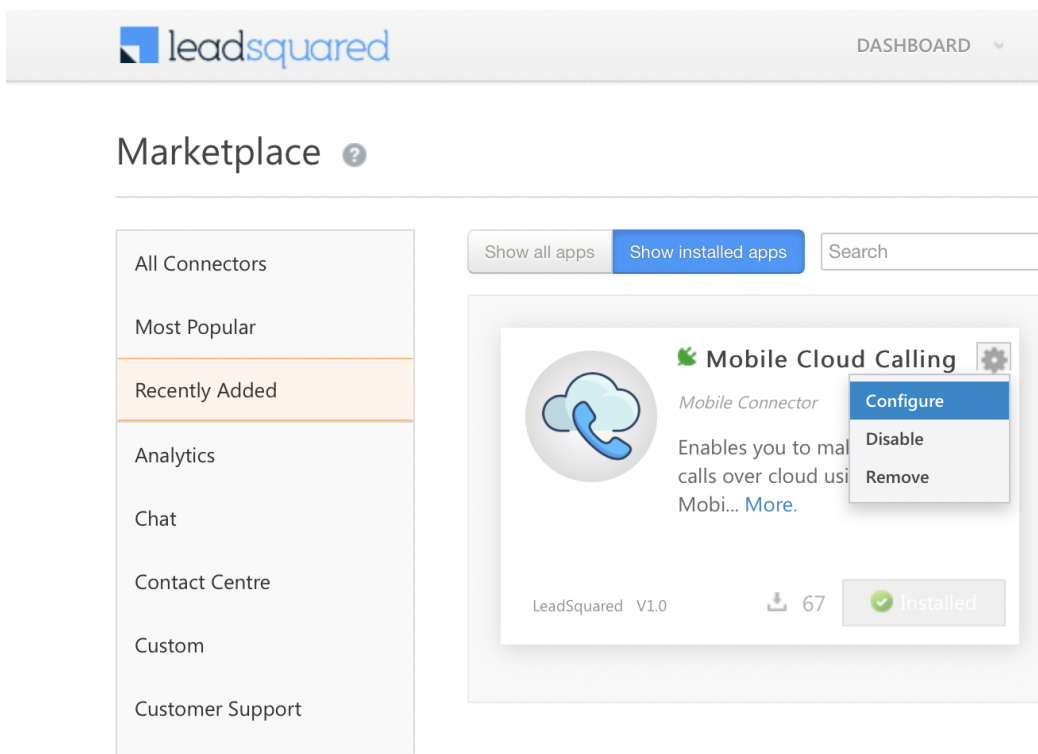
Mobile Cloud Calling

Mobile Connector

Enables you to make and receive calls over cloud using LeadSquared Mobi... [More](#).

LeadSquared V1.0 67 **INSTALL**

4. After it is installed, you need to configure it. Click on the “Configure” link




leadSquared DASHBOARD C

Marketplace ?

All Connectors
Most Popular
Recently Added
Analytics
Chat
Contact Centre
Custom
Customer Support

Show all apps Show installed apps



Mobile Cloud Calling

Mobile Connector

Enables you to make and receive calls over cloud using LeadSquared Mobi... [More](#).

LeadSquared V1.0 67 **Installed**

Configure
Disable
Remove

5. In the Configure window, select the option “Mobile App Calling: Both Default and Cloud Calling Enabled”
- In the User Field Containing Virtual Number (DID), select “virtualNumber” from the dropdown list and Save.

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Configure Mobile Cloud Calling

Prerequisites

Click to Call Set-up

Incoming Agent Pop-up

List All DID Numbers

Prerequisites

Basic configuration settings to get started with Mobile cloud calling

☒ **Mobile App Calling – Both Default and Cloud Calling Enabled**
Cloud calls can be placed only on your mobile app. You can also place regular calls through your service provider (eg Airtel, Vi, Jio etc).

☐ **Mobile App Calling – Only Cloud Calling Enabled**
Cloud calls can be placed only on your mobile app. The regular call feature (through your service provider) won't be available with this setting.

User Field Containing Virtual Number(DID)*

virtualNumber

You must populate virtual number for each agent in selected field to enable mobile cloud calling

Save

- Go to Click to Call Setup and use the Click to Call API given above to configure

Sample Configuration:

https://konnect.knowlarity.com/konnect/makecall/?api_key=<SR_api_key>&knumber=@{User:mx_Custom_8,}&integration=leadsquaredV2&customer=@{Lead:Phone,}&agent=@{User:PhoneMain,}&caller_id=@{User:mx_Custom_8,}&country_code=IN&source=mobileapp&LeadID=@leadId&UserID=@userId

For **knumber** and **caller_id**, use custom variables created in the user module of Leadsquared.

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Configure Mobile Cloud Calling

Prerequisites
[Click to Call Set-up](#)
Incoming Agent Pop-up
List All DID Numbers

1 API Configuration
2 Test API
3 Response Mapping

Response

200 OK

```
{
  "status": "success",
  "message": "Call successfully placed",
  "monitorUcid": "cfcc6536-24ab-4518-828f-6c2cc9f0c99d",
  "callStartTime": "2021-05-17 13:52:22"
}
```

+ Add Mapping

Key	Value	Mapping	Actions
status	"success"	Consider As Success	
message	"Call successfully placed"	Consider As Data	
monitorUcid	"cfcc6536-24ab-4518-828f-6c2cc9f0c99d"	Consider As Data	
callStartTime	"2021-05-17 13:52:22"	Consider As Data	

Back to API Testing
Save

10. If you get a failure response select “Consider as Error” for “error” and for rest values select “Consider As Data” after that click on Save button

Configure Mobile Cloud Calling

Prerequisites
[Click to Call Set-up](#)
Incoming Agent Pop-up
List All DID Numbers

1 API Configuration
2 Test API
3 Response Mapping

Response

200 OK

```
{
  "status": "error",
  "message": "The \"chunk\" argument must be one of type string or Buffer. Received type object"
}
```

+ Add Mapping

Key	Value	Mapping	Actions
status	"error"	Consider As Error	
message	"The \"chunk\" argument must be one of type string or Buffer. Received type object"	Consider As Data	

Back to API Testing
Save

11. In case of Invalid Test data provided by user, API response will give an “**error**” with the message as “**No active integration found**”
12. Click on the “Incoming Agent Pop Up” tab and configure the API here to enable real-time inbound call notifications to the agent in the form of an incoming call popup.

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13. Configure the API as mentioned above in the Agent Popup API section

API: https://konnect.knowlarity.com/app/v2/getCustomer?agent_number=@{User:PhoneMain,}

Header: Authorization with SR API Ke

Configure Mobile Cloud Calling

Prerequisites	<div> <div>1 API Configuration</div> <div>2 Test API</div> <div>3 Response Mapping</div> </div>								
Click to Call Set-up	<div>GET https://konnect.knowlarity.com/app/v2/getCustomer?agent_number=@{User:PhoneMain,}</div>								
Incoming Agent Pop-up	<div>PARAMETERS (1) HEADERS (1)</div> <div>+ Add New</div> <table border="1"> <thead> <tr> <th>Key</th> <th>Value</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Authorization</td> <td>[REDACTED]</td> <td> </td> </tr> </tbody> </table>			Key	Value	Actions	Authorization	[REDACTED]	 
Key	Value	Actions							
Authorization	[REDACTED]	 							
List All DID Numbers	<div>Go to Test API</div>								

14. Click on “Go to Test API” button and input test data (any registered agent phone number)

Configure Mobile Cloud Calling

Prerequisites	<div> <div>1 API Configuration</div> <div>2 Test API</div> <div>3 Response Mapping</div> </div>				
Click to Call Set-up					
Incoming Agent Pop-up	<div>Input Test Data</div> <table border="1"> <tr> <td>@{User:PhoneMain,}</td> <td>+917760811414</td> </tr> </table>			@{User:PhoneMain,}	+917760811414
@{User:PhoneMain,}	+917760811414				
List All DID Numbers	<div>Back to API Request Test And Map Response</div>				

15. In the “Test and Map Response” screen,

- In case of success response select “Consider As Success” for “Status” and select “Consider as Data” for the rest
- In case of Failure response select “Consider As Error” for “Status” and select “Consider as Data” for the rest

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Configure Mobile Cloud Calling

Prerequisites
Click to Call Set-up
Incoming Agent Pop-up
List All DID Numbers

1 API Configuration
2 Test API
3 Response Mapping

Response

200 OK

```
{ "status": "success", "message": "+919140534919" }
```

+ Add Mapping

Key	Value	Mapping	Actions
status	"success"	Consider As Success	
message	" +919140534919"	Consider As Data	

Back to API Testing
Save

16. Save the response mapping

17. Click on the “List all DID Numbers” tab to configure the API and get all CLI Numbers registered with the SR account.

API: <https://konnect.knowlarity.com/app/v2/getclinumbers>

Header: Authorization with SR API Key

Configure Mobile Cloud Calling

Prerequisites
Click to Call Set-up
Incoming Agent Pop-up
List All DID Numbers

1 API Configuration
2 Test API
3 Response Mapping

GET <https://konnect.knowlarity.com/app/v2/getclinumbers>

PARAMETERS (0)
HEADERS (1)

+ Add New

Key	Value	Actions
Authorization	Basic	

Go to Test API

18. Click on “Go to Test API” button and in the Response Mapping section,
- In case of success response select “Consider As Success” for “Status” and select “Consider as Data” for the rest

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- In case of Failure response select “Consider As Error” for “Status” and select “Consider as Data” for the rest

Configure Mobile Cloud Calling

Prerequisites

Click to Call Set-up

Incoming Agent Pop-up

List All DID Numbers

1 API Configuration
2 Test API
3 Response Mapping

Response

200 OK
{"status":"success","did_list":["+918047223510","+918035387277"]}

+ Add Mapping

Key	Value	Mapping	Actions
status	"success"	Consider As Success	
did_list	["+918047223510","+918035387277"]	Consider As Data	

Back to API Testing
Save

Configure Leadsquared Call & SMS Tracker Mobile App (Only for Android)

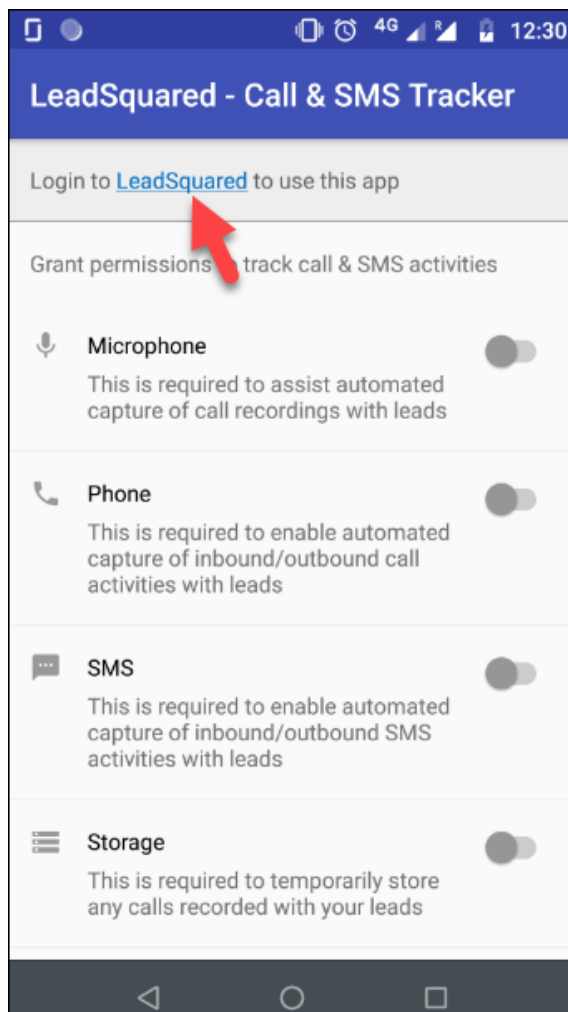
1. This application is required to show call Popup and Notification against Incoming/Outgoing calls
2. For more details, check <https://help.leadsquared.com/call-sms-app/>

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3. Download and login to the app using the Leadsquared credentials

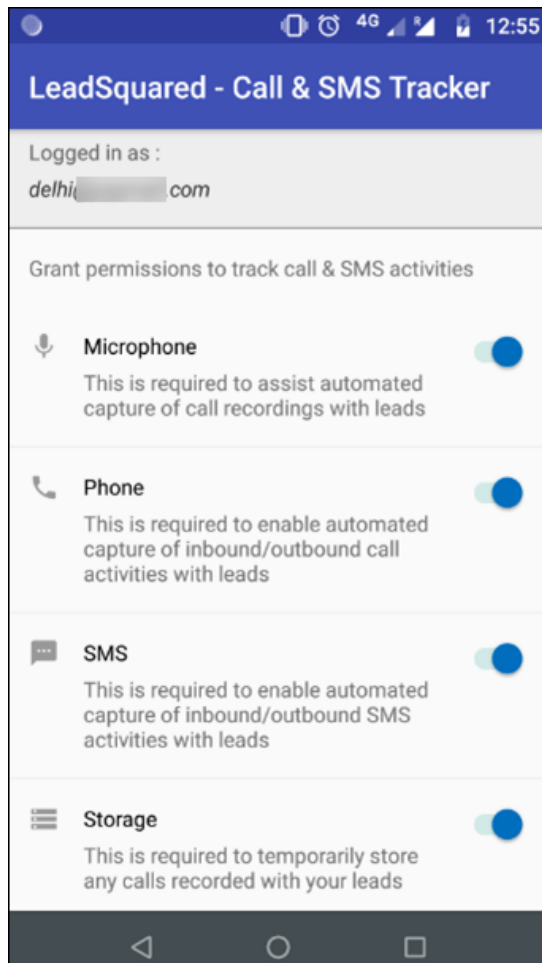


4. Give all the permissions to the mobile app

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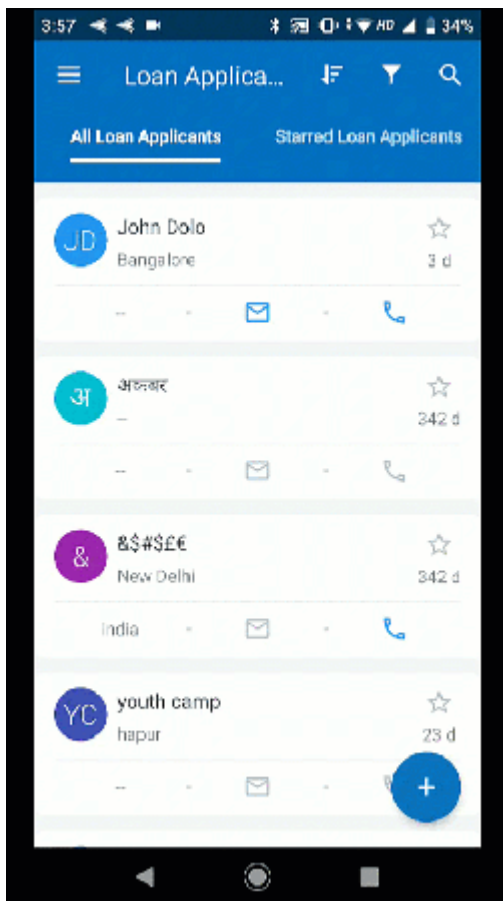
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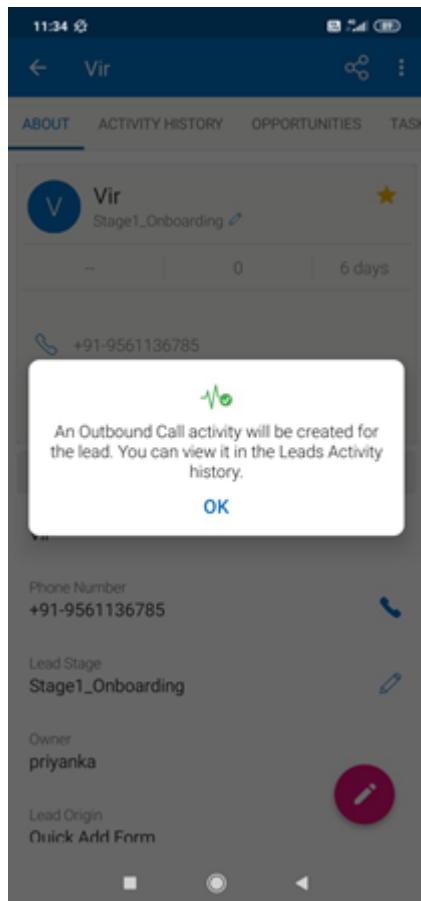
5. As long as these permissions are enabled Call and SMS tracking functionality –
- Will continue to work even if the Call and SMS tracker app is not running in the background.
 - Will work even if you are offline.
 - Can be disabled only from the settings of your device.

Configure Leadsquared CRM Mobile App (Only for IOS & Android)

1. Download Leadsquared CRM Mobile App from App Store or Playstore
2. Open the LeadSquared mobile app, and navigate to the Leads screen.
3. For the lead you want to call, tap on the lead, or swipe the lead card.
4. On the Lead Details page, tap the  icon, or tap the lead's phone number.
5. From the options, tap Cloud Call Lead, and wait for the call to initiate.



6. Once the call is completed, the call details are available on the Activity History tab. (Only if the UTC connector is also setup)



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Adding SR Number & CLI Number to Leadsquared Custom Fields

- In the Sample configuration given below, the highlighted fields are the SR Number & CLI Number fields respectively

Sample Configuration:

`https://konnnect.knowlarity.com/konnnect/makecall/?api_key=<SR_api_key>&knumber=@{User:mx_Custom_8,}&integration=leadsquaredV2&customer=@{Lead:Phone,}&agent=@{User:PhoneMain,}&caller_id=@{User:mx_Custom_8,}&country_code=IN&source=mobileapp&LeadID=@leadId&UserID=@userId`

- We can change these to any other custom fields in Leadsquared if necessary
- The custom fields in Leadsquared user object can be created following the steps given in the link below
<https://help.leadsquared.com/manage-user-custom-fields/>
- Please note that the custom fields used here should have the SR Number & CLI Number values filled in for each user
- To fill in values to custom fields for a user, go to “**User Profile in Leadsquared > Other Details**” and edit

Work Details		Edit
Date Of Joining		
Date Of Resignation		
Location Details		
Location Name	-	
Address	-	
City	-	
State	-	
Country	Afghanistan	
Zip Code	-	
Other Details		
Gender	Not Specified	
Custom 1	-	
Custom 2	-	
Custom 3	-	
Custom 4	-	
Custom 5	-	
Custom 6	-	
Custom 7	-	
Custom 8	-	
Custom 9	-	
Custom 10	-	

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Feature Limitations

Following are some of the integration limitations -

1. This integration does not support call center features like agent status, mute, hold etc from the CTI plugin
2. There is no call progress related change that happens on the CTI plugin

Troubleshooting

Q: Call Popup is not coming in Leadsquared

- Please ensure the integration steps are followed properly
- Also ensure that the phone number on which you are getting the call is correctly updated in your leadsquared Profile settings
- If all settings are correct, try logging in and out once to see if it resolves
- Try reinstalling the UTC connector and re-integrating with SuperReceptionist
- If the issue still continues, Contact customer support

Q: The recording icon is not coming against activity in Leadsquared?

A: Check if the call is answered. For non-connected calls, recordings are not available

Q: Recording is taking time to play/become available ?

A: Sometimes due to system latency, big recording files or some other issues, recording might appear at some delay. Usually this gets resolved on its own, but if it persists please contact support.

Q: Is click to call from Leadsquared to an international number supported?

A: Yes

References

[Leadsquared Mobile Cloud Calling Connector](#)