

# Installation Guide for LeadSquared Integration

(A separate doc/ help article for users)

## App Listing

### **1. Overview –**

Leadsquared CRM is a marketing automation and sales execution platform that helps businesses increase their closures and manage their pipelines easily.

When integrated with Smartflo, it helps in call related activities inside CRM that increases your business's productivity and lead scoring.

### **2. Prerequisites –**

1. Tata Smartflo Account
2. Leadsquared admin account (UTC enabled)

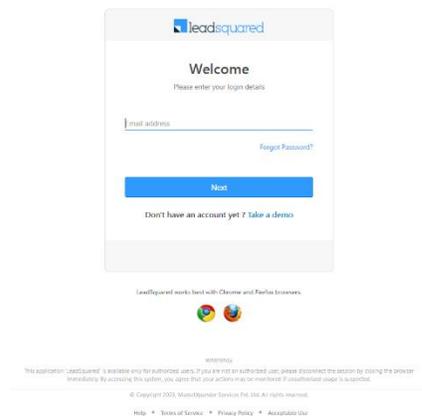
### **3. How it works (add screenshots) –**

Leadsquared integration provides the below-listed functionalities of Smartflo.

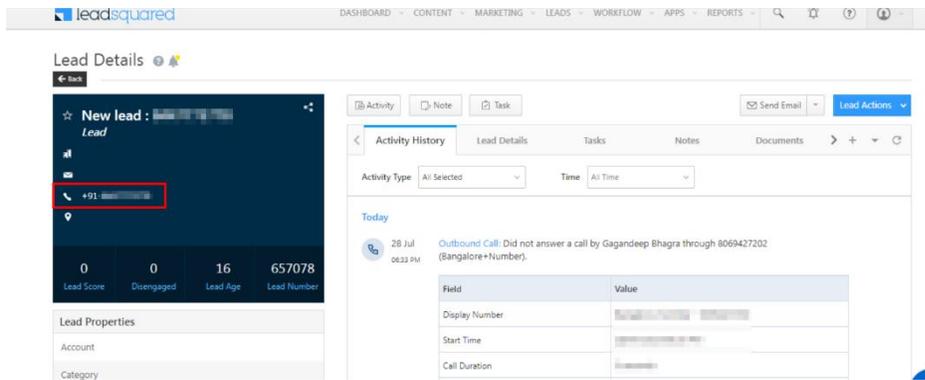
- **Click To Call (Outbound Calls)**
- **Agent Extension**
- **Call Notes or Call Description**
- **Call Detail Records**

Follow the steps below to start using Leadsquared on Smartflo.

1. **Log In** to the app.



2. To use the **Click to Call** functionality, click on the number to which you want to make a call.

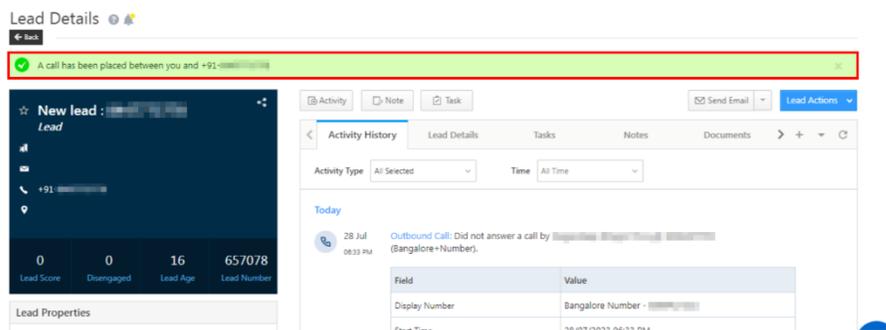


You'll see the following pop-up.

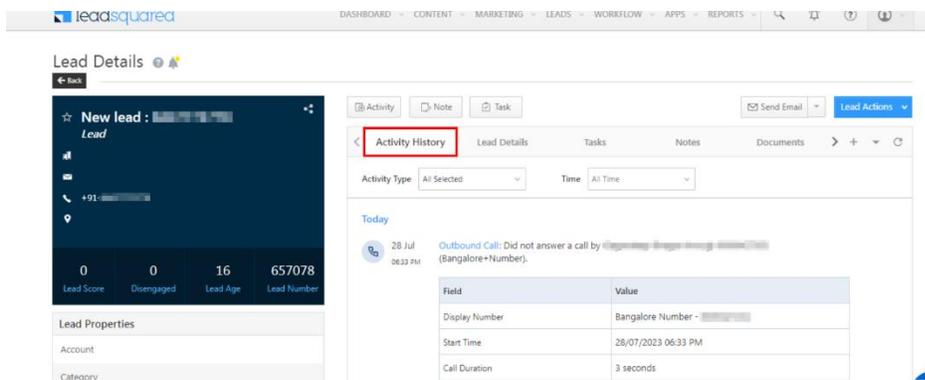


Click on **Call** to make a call.

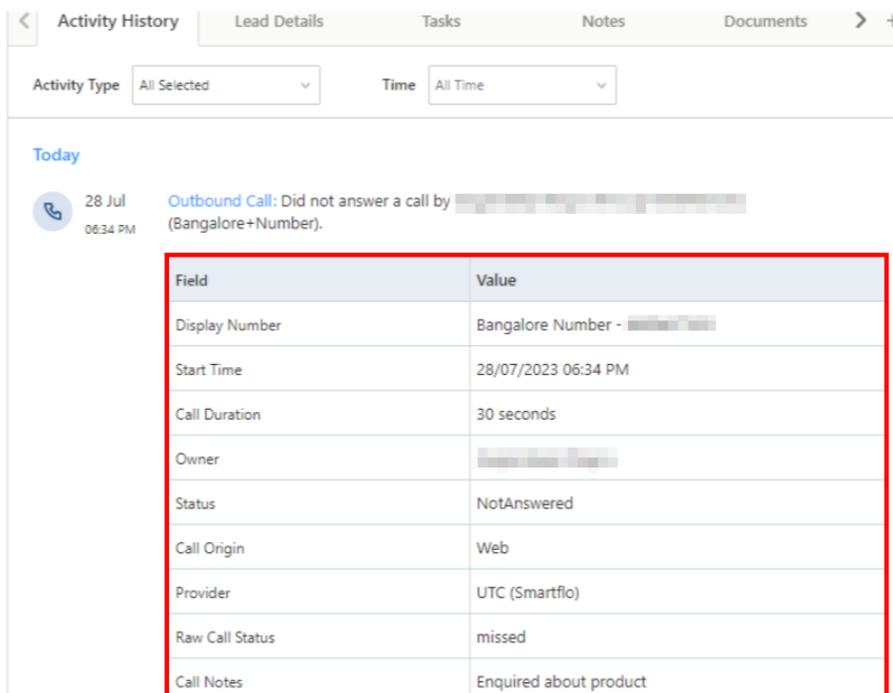
You'll see the following message once the call has been made successfully.



3. To view the **Call Detail Records**, click on **Activity History**.



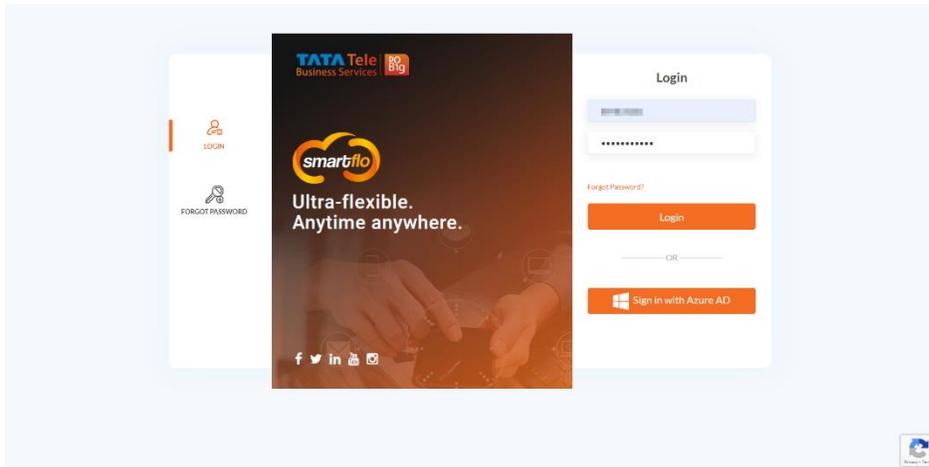
The CDR gives the following details.



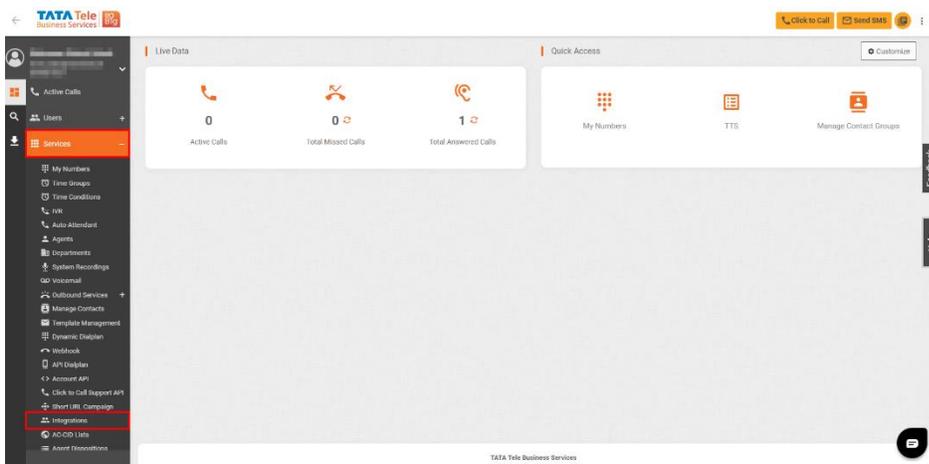
#### 4. Installation/Configuration Steps (add screenshots) \*

Follow the steps below to integrate Smartflo with Leadsquared.

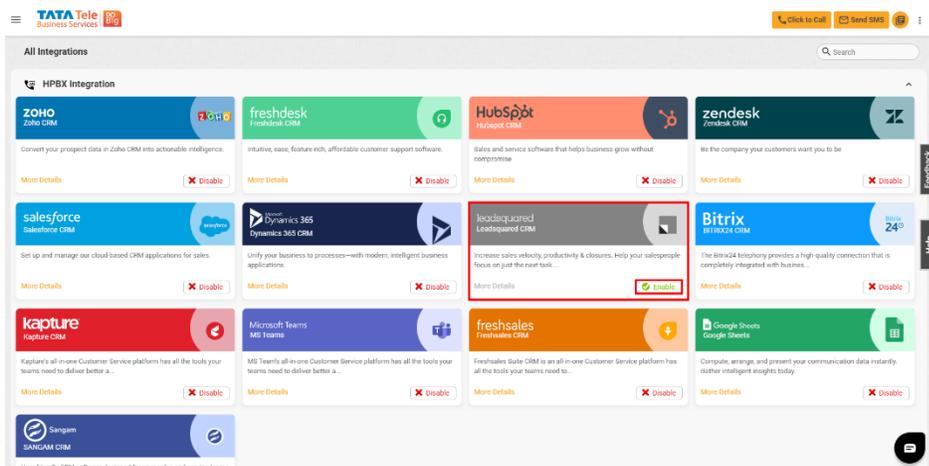
1. Login to your [Smartflo](#) account.



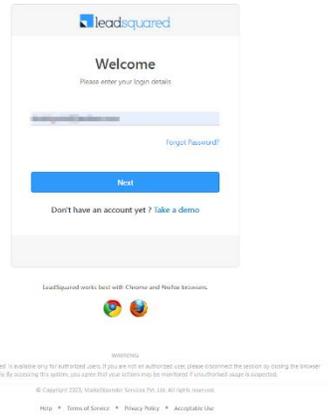
2. Click on **Integrations** under the **Services** tab.



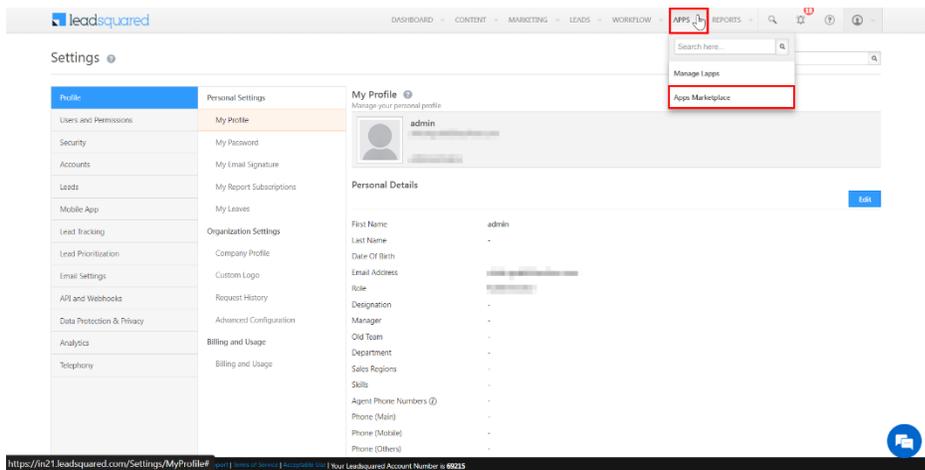
3. Move over to the **Leadsquared** integration and click on **Enable**.



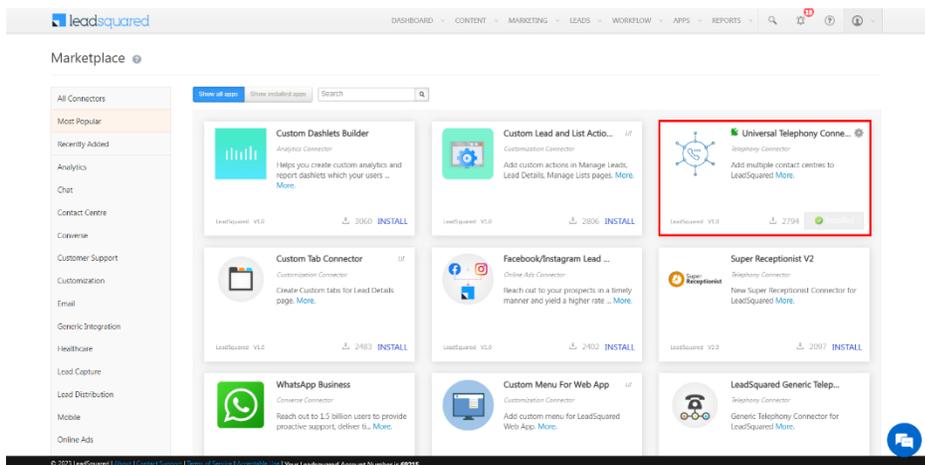
4. Log into your **LeadSquared** account.



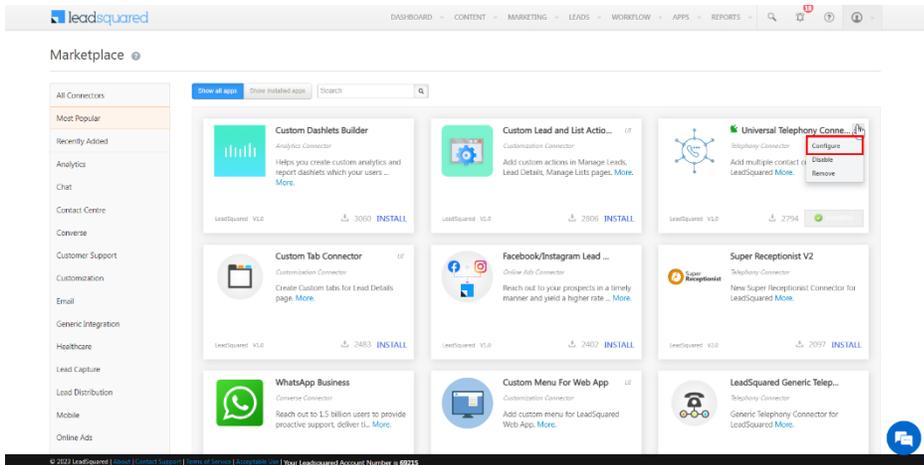
## 5. Click Apps > Apps Marketplace



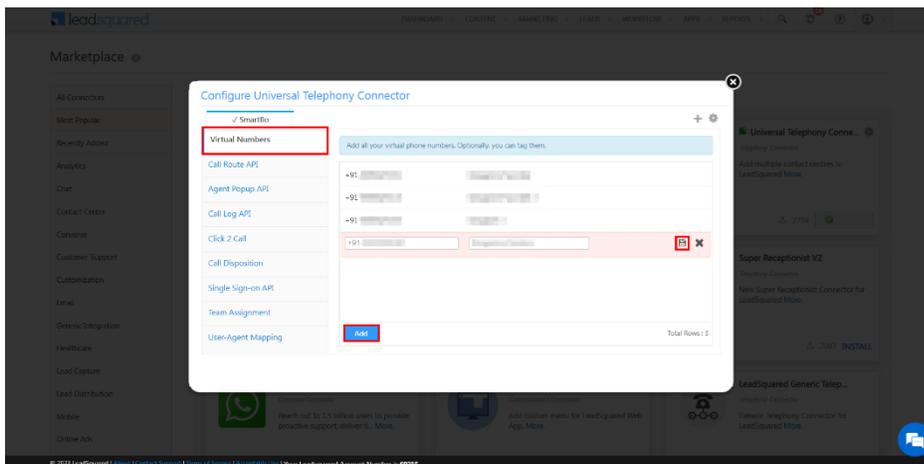
## 6. Verify it contains the LeadSquared Universal Telephony Connector; if not, then install it.



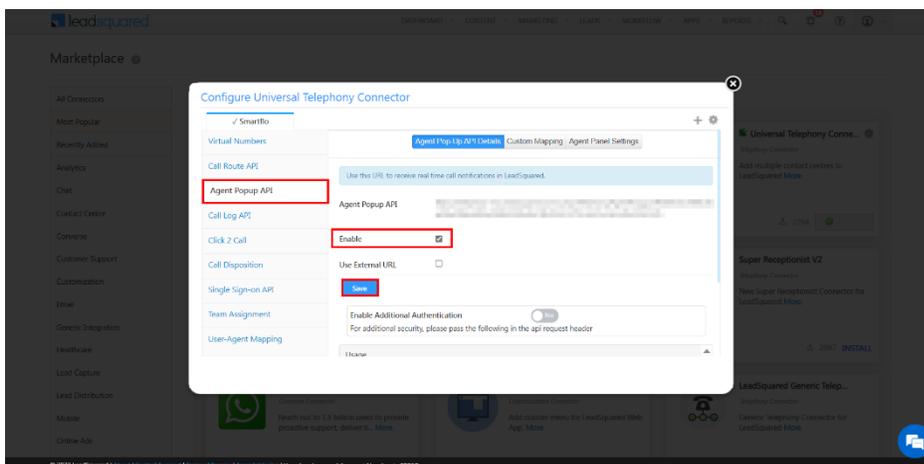
## 7. Configure the settings by clicking the configure icon.



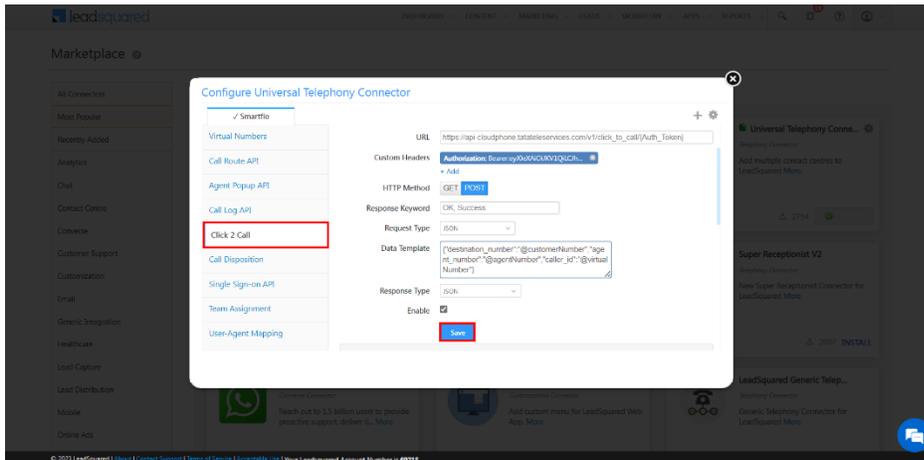
8. The below configuration page appears. Now, add **Virtual Number** in the format +91-XXXXXXXXXX and give a name to it.



9. Next, enable the Agent popup API and click **Save** button.

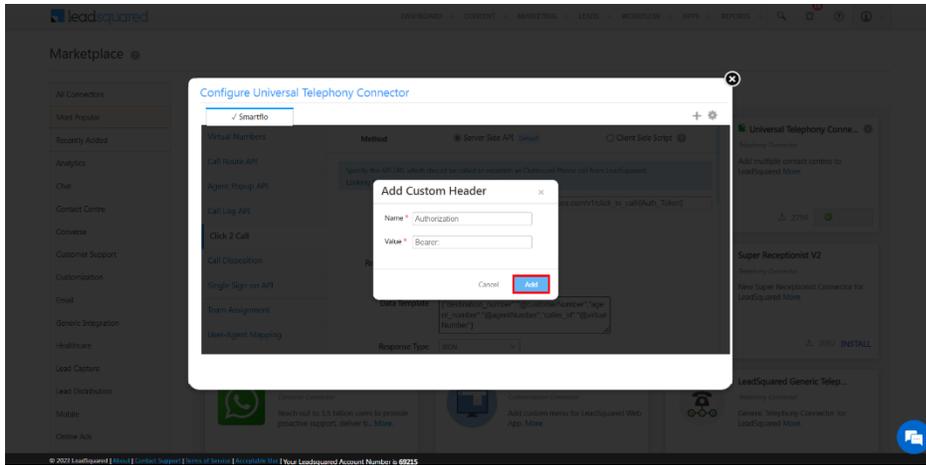


10. Under **Click 2 Call**, ensure the fields have the following details:



Field	Value
URL	https://api-cloudphone.tatateleservices.com/v1/click_to_call/{Auth_Token}
HTTP Method	POST
Response Keyword	OK, Success
Request Type	JSON
Data Template	{\"destination_number\":\"@customerNumber\",\"agent_number\":\"@agentNumber\",\"caller_id\":\"@virtualNumber\"}
Response Type	JSON

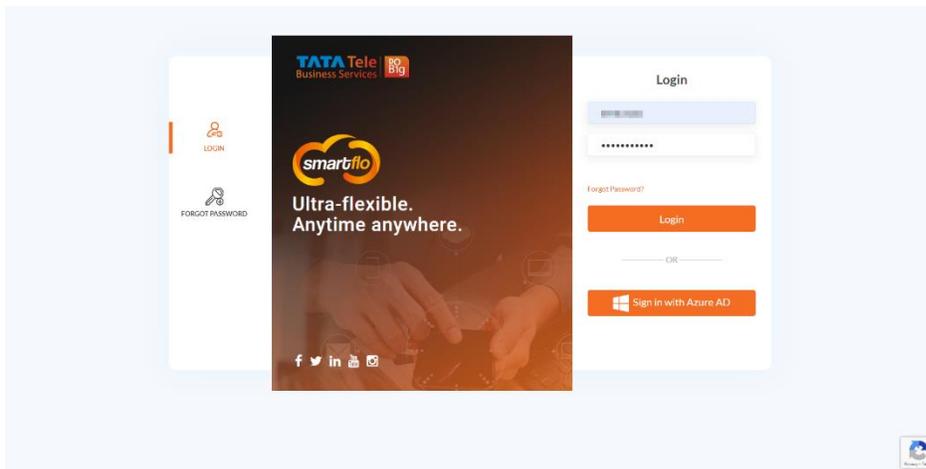
Use the following details for **Custom Header**:



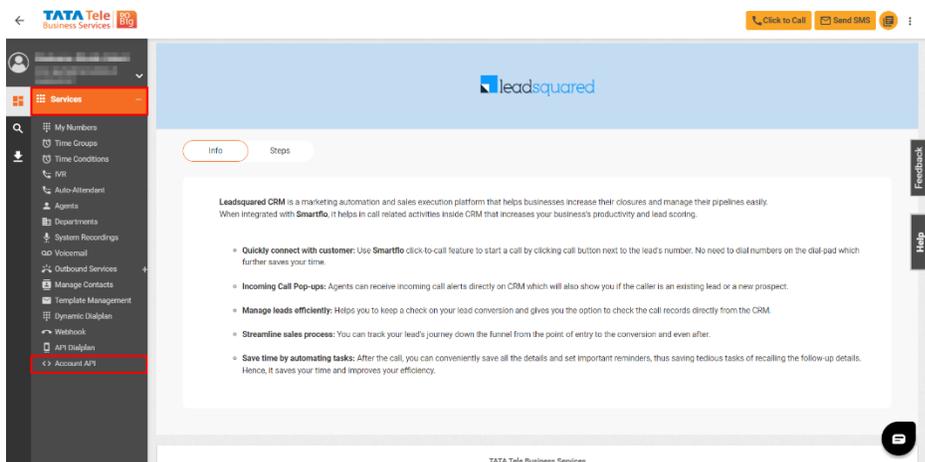
Field	Value
Name	Authorization
Value	Bearer:Auth_Token

Follow the steps below to generate Auth\_Token

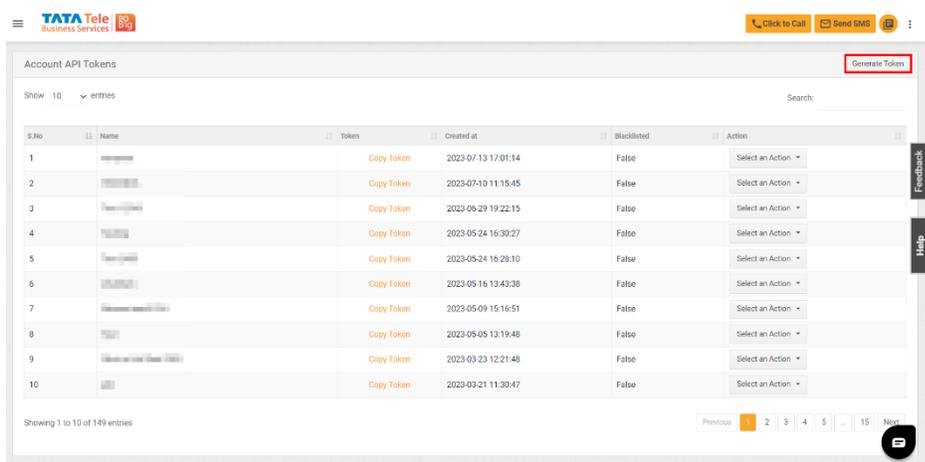
a. Login to your [Smartflo](#) account.



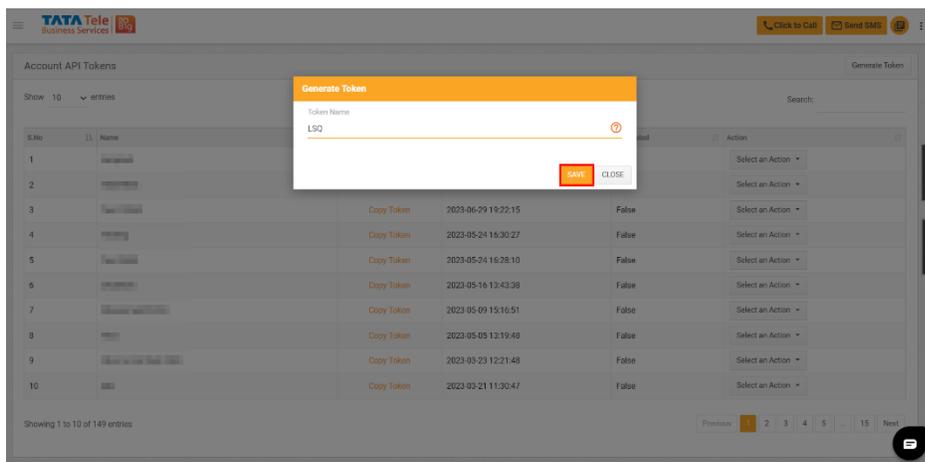
b. Click on **Account API** under the **Services** tab.



c. Click on **Generate Token**.



d. Give a token name and click on **Save**.



e. Click on **Copy Token** to copy the value.

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API Token copied to clipboard

Click to Call Send SMS

Account API Tokens

Show 10 entries

S.No	Name	Token	Created at	Blacklisted	Action
1	LSQ	Copy Token	2023-07-25 16:44:30	False	Select an Action
2		Copy Token	2023-07-13 17:01:14	False	Select an Action
3		Copy Token	2023-07-10 11:15:45	False	Select an Action
4		Copy Token	2023-06-29 19:22:15	False	Select an Action
5		Copy Token	2023-05-24 16:30:27	False	Select an Action
6		Copy Token	2023-05-24 16:28:10	False	Select an Action
7		Copy Token	2023-05-16 13:43:38	False	Select an Action
8		Copy Token	2023-05-09 15:16:51	False	Select an Action
9		Copy Token	2023-05-05 13:19:48	False	Select an Action
10		Copy Token	2023-03-23 12:21:48	False	Select an Action

Showing 1 to 10 of 150 entries

## 11. Now, click on **Manage Users**.

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DASHBOARD - CONTENT - MARKETING - LEADS - WORKFLOW - APPS - REPORTS

Marketplace

All Connectors

Most Popular

Recently Added

Analytics

Chat

Contact Centre

Converse

Customer Support

Customization

Email

Generic Integration

Healthcare

Lead Capture

Lead Distribution

Mobile

Online Ads

Custom Dashlets Builder

Custom Lead and List Action...

Universal Support

Custom Tab Connector

Facebook/Instagram Lead...

Super Receptionist V2

WhatsApp Business

Custom Menu For Web App

LeadSquared Generic Telep...

Manage Users

Settings

Sign Out

https://m2.leadSquared.com/Apps/Marketplace#

Account Number is 69215

## 12. **Edit** the user by clicking on the cog icon present next to it.

leadsquared

DASHBOARD - CONTENT - MARKETING - LEADS - WORKFLOW - APPS - REPORTS

Users

Create and Update LeadSquared users

Search Users

Advanced Search

Actions

Type: Regular Users

Rule: All

Status: Active

Team: All

Create

Name	Email Address	Role	Permission Templates	Actions
		Administrator		
		Administrator		

1 - 2 of 2

2 active users are allowed.

Edit

Deactivate

Reset Password

Set Billing User

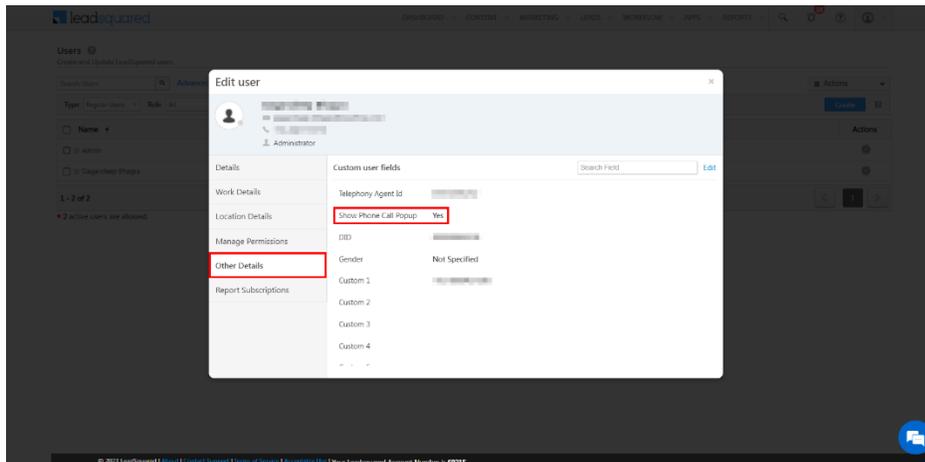
View Automation Report

Disable 2FA

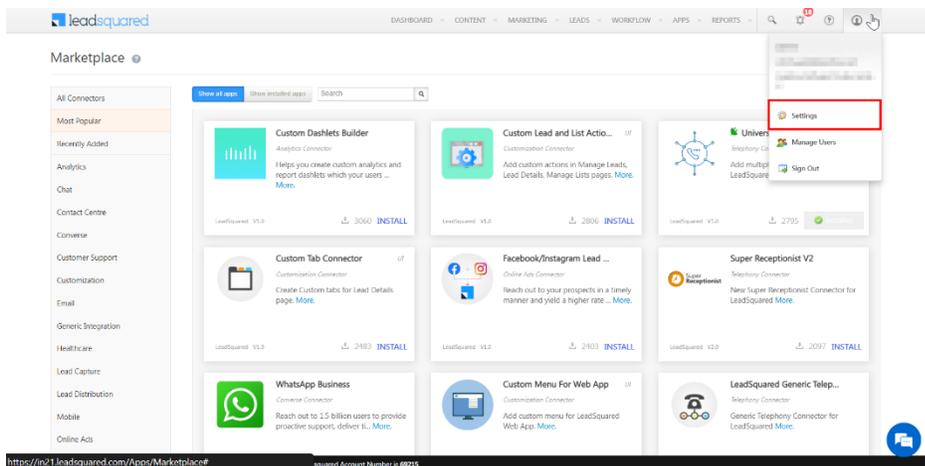
Configure Home Page

© 2023 LeadSquared | About | Contact Support | Terms of Service | Privacy Policy | Your LeadSquared Account Number is 69215

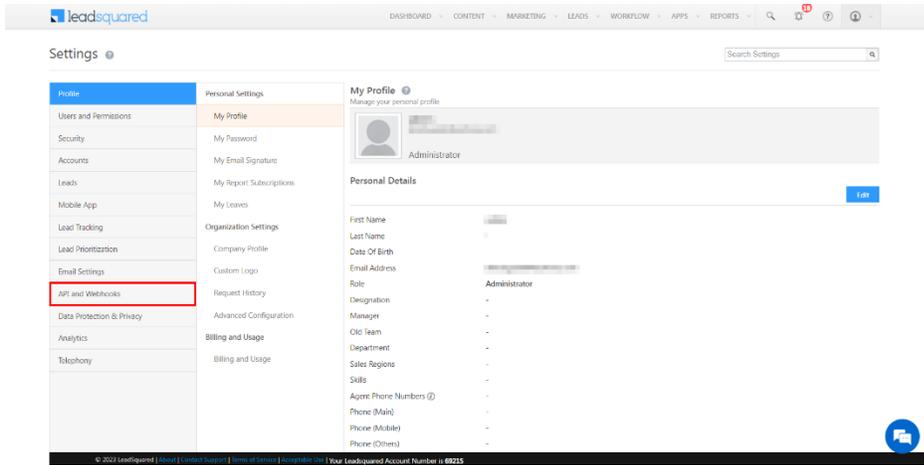
13. Ensure the **Show Phone Call Popup** under **Other Details** is stated as Yes. If not, then you can change the settings by clicking **Edit**.



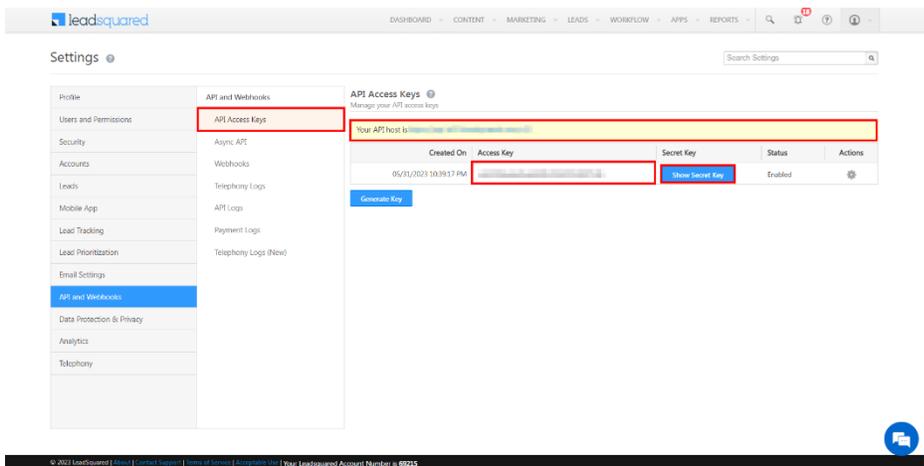
14. Go to **User Settings**.



15. Click on **API and Webhooks**.

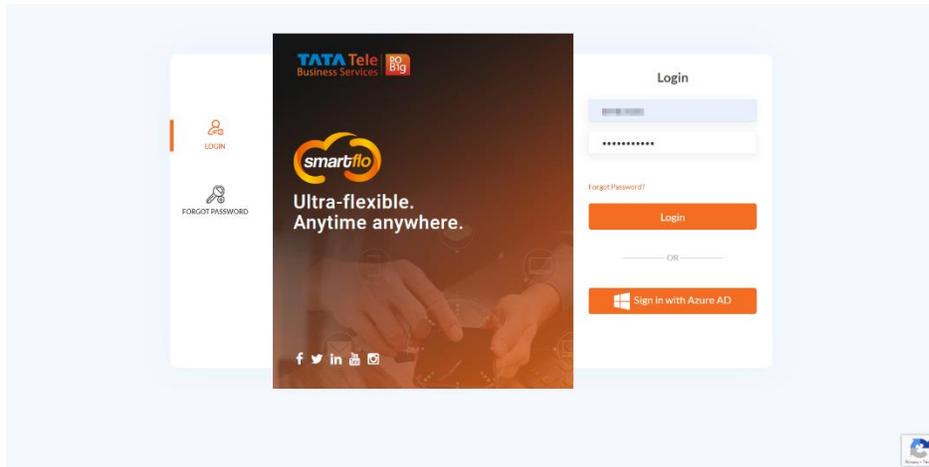


16. The API and Webhooks page display the "Access Key" and "Secret Key".

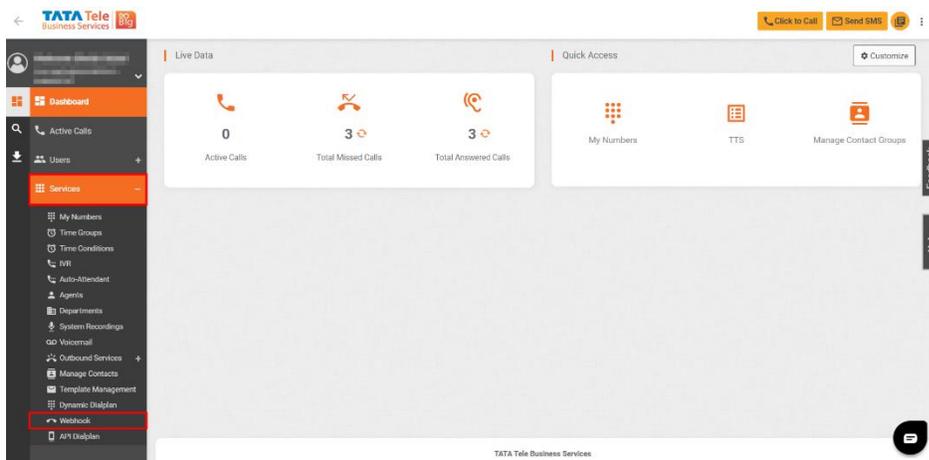


The above highlighted API host URL, access key and secret key will be used while configuring the webhooks. The secret key is supposed to be confidential and should not be shared with anyone.

17. Login to your [Smartflo](#) account.

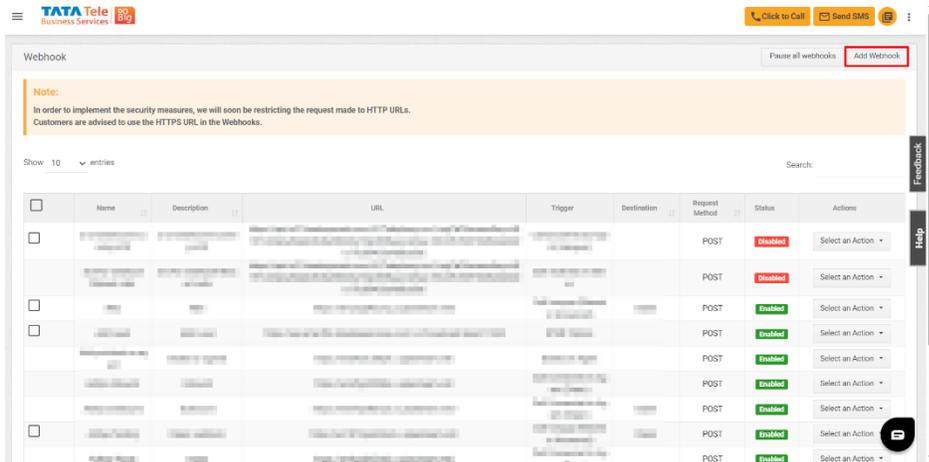


## 18. Click on **Webhook** under **Services**

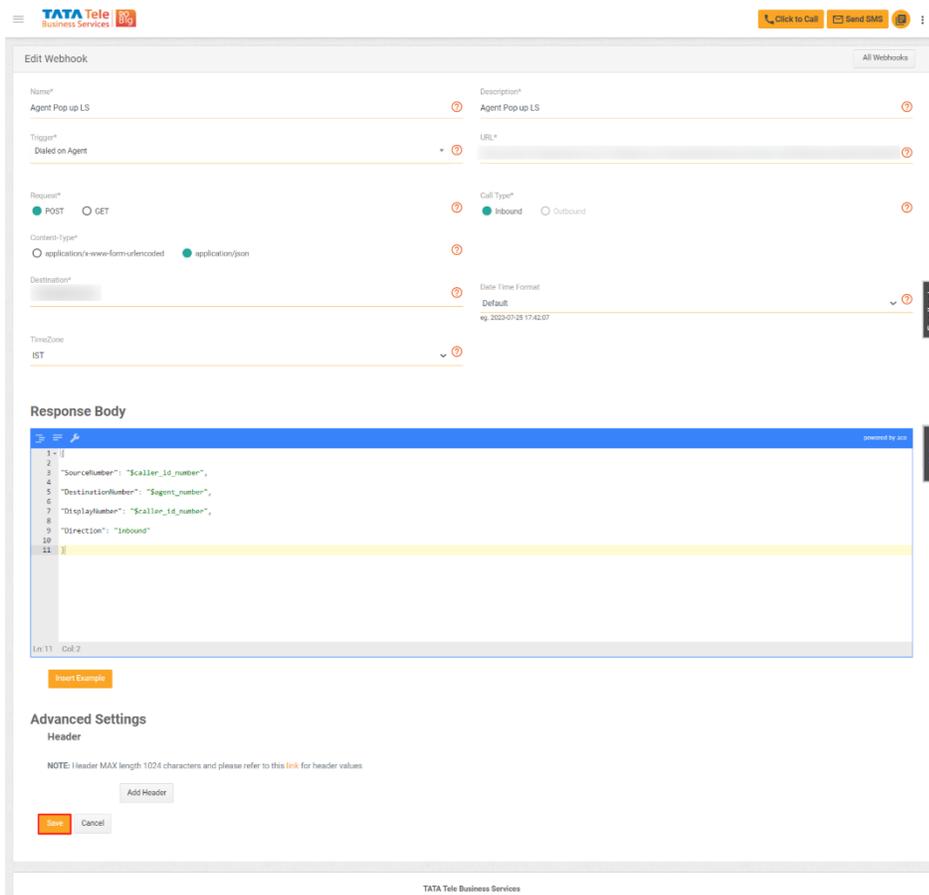


## 19. Create four webhooks by clicking **Add Webhook**.

- **Agent Pop up** to get screen prompt when a prospect/lead call you.
- **Call Log API LS(Incoming-Answered)** to manage logs for incoming answered calls.
- **Call Log API LS(Incoming-Missed)** to manage logs for incoming missed calls.
- **Call Log API LS (Outgoing)** to manage logs of outgoing calls.



20. Create the **First** Webhook by entering the below mentioned details.



Field	Value
Name	Agent Pop up LS

Description	Agent Pop up LS
Trigger	Dialed on Agent
URL	<p>http://{host}/v2/Telephony.svc/ShowAgentPopup?accessKey={AccessKey}&amp;secretKey={SecretKey}</p> <p><b>Note:</b> Host refers to the API host URL, <b>AccessKey</b> is your unique access key and <b>SecretKey</b> is your unique secret key</p>
Request	POST
Call Type	Inbound
Content Type	application/json
My Numbers	Choose the virtual number from the list
Time zone	Choose the time zone

Enter the below code in **Response Body**:

```
{
"SourceNumber": "$caller_id_number",
"DestinationNumber": "$agent_number",
"DisplayNumber": "$caller_id_number",
"Direction": "inbound"
}
```

Click **Save** button once all the details have been added.

21. Create the **Second** Webhook by entering the below mentioned details **Call Log API**:

**Add Webhook**

Name: Call Log API LS Incoming Answered

Description: Call Log API LS Incoming Answered

Trigger: Call answered by Agent (Hangup)

Request: POST

Content Type: application/json

My Numbers: [Redacted]

Timezone: IST

Call Type: Inbound

Enable retries: [Checked]

Date Time Format: Default

**Response Body**

```

1: {
2:
3:   "SourceNumber": "$caller_id_number",
4:
5:   "CallerSource": "$caller_id_number",
6:
7:   "DestinationNumber": "$call_to_number",
8:
9:   "DisplayNumber": "$caller_id_number",
10:
11:   "StartTime": "$start_stamp",
12:
13:   "EndTime": "$end_stamp",
14:
15:   "CallDuration": "$duration",
16:
17:   "ResourceURL": "$recording_url",
18:
19:   "Direction": "$direction",
20:
21: }

```

**Advanced Settings**

Header

key	value	Delete

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Field	Value
Name	Call Log API LS Incoming Answered
Description	Call Log API LS Incoming Answered
Trigger	Call answered by Agent (Hangup)
URL	<p>http://{host}/v2/Telephony.svc/ShowAgentPopup?accessKey={AccessKey}&amp;secretKey={SecretKey}</p> <p><b>Note:</b> Host refers to the API host URL, <b>AccessKey</b> is your unique access key and <b>SecretKey</b> is your unique secret key</p>
Request	POST
Call Type	Inbound
Content Type	application/json

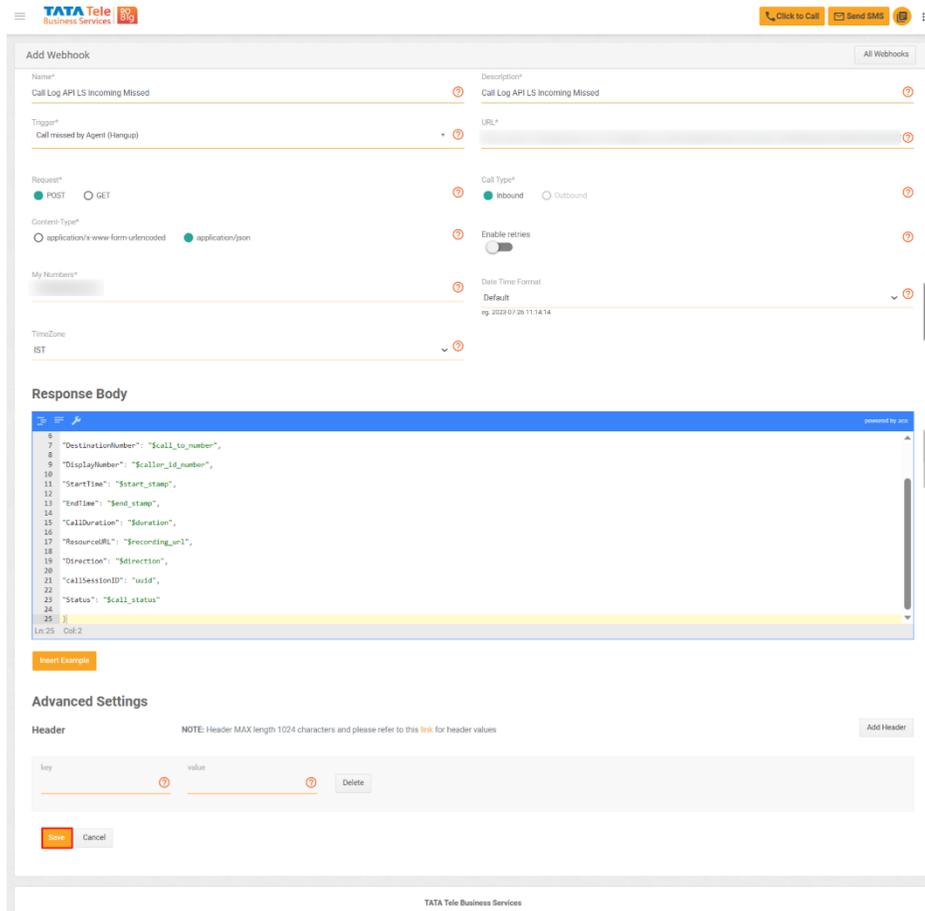
My Numbers	Choose the virtual number from the list
Time zone	Choose the time zone

Enter the below code in **Response Body**:

```
{
  "SourceNumber": "$caller_id_number",
  "DestinationNumber": "$answered_agent_number",
  "DisplayNumber": "$call_to_number",
  "StartTime": "$start_stamp",
  "EndTime": "$end_stamp",
  "CallDuration": "$duration",
  "Status": "$call_status",
  "CallNotes": "Enquired about product",
  "ResourceURL": "$recording_url",
  "Direction": "Inbound",
  "CallSessionId": "$call_id"
}
```

Click **Save** button once all the details have been added.

22. Create the **Third** Webhook by entering the below mentioned details **Call Log API:**



Field	Value
Name	Call Log API LS Incoming Missed
Description	Call Log API LS Incoming Missed
Trigger	Call answered by Agent (Hangup)
URL	<p>http://{host}/v2/Telephony.svc/ShowAgentPopup?accessKey={AccessKey}&amp;secretKey={SecretKey}</p> <p><b>Note:</b> Host refers to the API host URL, <b>AccessKey</b> is your unique access key and <b>SecretKey</b> is your unique secret key</p>
Request	POST
Call Type	Inbound
Content Type	application/json

My Numbers	Choose the virtual number from the list
Time zone	Choose the time zone

Enter the below code in **Response Body**:

```
{
  "SourceNumber": "$caller_id_number",
  "DestinationNumber": "$first_missed_agent_follow_me_number",
  "DisplayNumber": "$call_to_number",
  "StartTime": "$start_stamp",
  "EndTime": "$end_stamp",
  "CallDuration": "$duration",
  "Status": "$call_status",
  "CallNotes": "Enquired about product",
  "ResourceURL": "$recording_url",
  "Direction": "Inbound",
  "CallSessionId": "$call_id"
}
```

Click **Save** button once all the details have been added.

23. Create the **Fourth** webhook by entering the below mentioned details **Call Log API**:

**Add Webhook**

Name: Call Log API LS Outgoing

Description: Call Log API LS Outgoing

Trigger: Call hangup (Missed or Answered)

URL: <http://{{host}}/v2/Telephony.svc/ShowAgentPopup?accessKey={AccessKey}&secretKey={SecretKey}>

Request: POST

Content Type: application/json

My Numbers: [Redacted]

Timezone: IST

Call Type: Inbound

Enable retries: [Off]

Date Time Format: Default (eg. 2022-07-26 11:04:39)

**Response Body**

```

{
  "DestinationNumber": "Scall_to_number",
  "DisplayNumber": "Scaller_id_number",
  "StartTime": "Start_stamp",
  "EndTime": "Send_stamp",
  "CallDuration": "Duration",
  "ResourceURL": "Recording_url",
  "Direction": "Strirection",
  "callSessionID": "uid",
  "Status": "Scall_status"
}

```

**Advanced Settings**

Header

NOTE: Header MAX length 1024 characters and please refer to this link for header values

key	value	Delete

Buttons: Save, Cancel

Field	Value
Name	Call Log API LS Outgoing
Description	Call Log API LS Outgoing
Trigger	Call hangup (Missed or Answered)
URL	<a href="http://{{host}}/v2/Telephony.svc/ShowAgentPopup?accessKey={AccessKey}&amp;secretKey={SecretKey}">http://{{host}}/v2/Telephony.svc/ShowAgentPopup?accessKey={AccessKey}&amp;secretKey={SecretKey}</a> <b>Note:</b> Host refers to the API host URL, <b>AccessKey</b> is your unique access key and <b>SecretKey</b> is your unique secret key
Request	POST
Call Type	Inbound
Content Type	application/json

My Numbers	Choose the virtual number from the list
Time zone	Choose the time zone

Enter the below code in **Response Body**:

```
{
  "SourceNumber": "$answered_agent_number",
  "DestinationNumber": "$call_to_number",
  "DisplayNumber": "$caller_id_number",
  "StartTime": "$start_stamp",
  "EndTime": "$end_stamp",
  "CallDuration": "$duration",
  "Status": "$call_status",
  "CallNotes": "Enquired about product",
  "ResourceURL": "$recording_url",
  "Direction": "$direction",
  "CallSessionId": "$call_id",
  "AgentName": "$answered_agent_name"
}
```

Click **Save** button once all the details have been added.