



FIBERME Communications LLC.

FCM630A Series IP PBX - ACT! CRM Integration Guide

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INTRODUCTION

Customer relationship management (CRM) is a set of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle, with the goal of improving business relationships with customers.

The FCM630A series can be integrated with different CRMs including ACT! CRM allowing users to get full information about their contacts and save call information details to specific table history for further usage.

This guide contains a step-by-step configuration needed to set up ACT! CRM with the FCM630A.



ACT! CRM CONFIGURATION

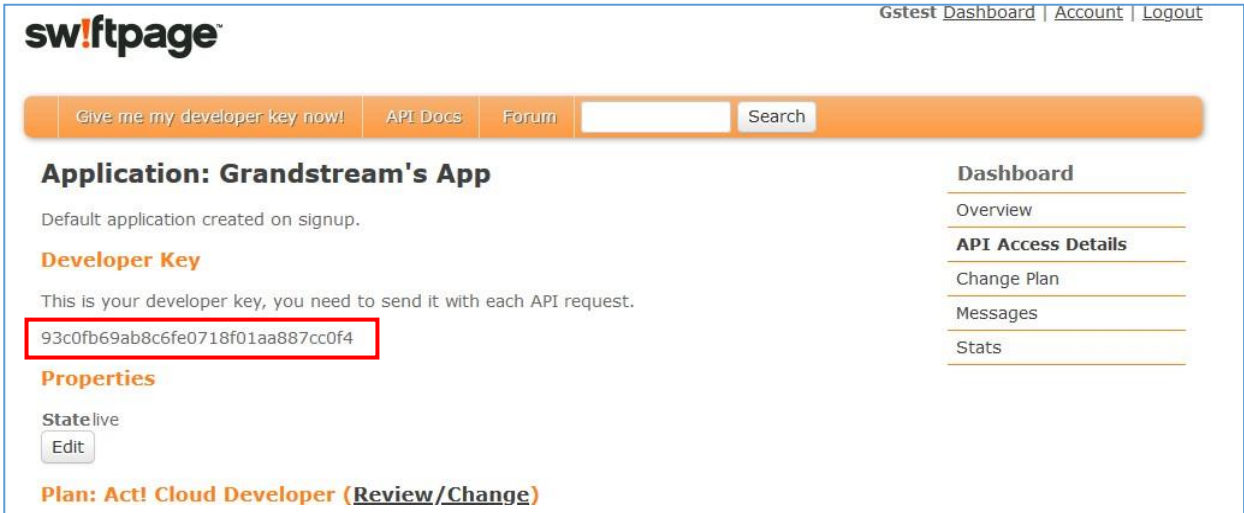
To integrate ACT! CRM with FCM630A, we need firstly to respect the following 2 main steps:

1. **Generate Developer Key**
2. **Generate API Key**

Generate Developer Key

To generate Developer key, do the following:

1. Enter <https://actcloud.3scale.net/> into your browser address field.
2. Create an account.
3. Log in using the account created and click on **Give me my developer key now!** and a developer key will be generated as shown in the figure below



The screenshot shows the sw!ftpage dashboard for a user named 'Gstest'. The main content area displays the application 'Grandstream's App' with a default application note. Under the 'Developer Key' section, the key '93c0fb69ab8c6fe0718f01aa887cc0f4' is highlighted with a red box. Below this, the 'Properties' section shows the state as 'live' with an 'Edit' button. At the bottom, the plan is listed as 'Act! Cloud Developer' with a link to 'Review/Change'. The right sidebar contains a 'Dashboard' menu with links for Overview, API Access Details, Change Plan, Messages, and Stats. The top navigation bar includes links for 'Give me my developer key now!', 'API Docs', 'Forum', and a search box.

Figure 1: Developer Key

Note: In our example, the Developer Key generated is 93c0fb69ab8c6fe0718f01aa887cc0f4

Generate API Key

To acquire the API key, please follow the steps below:

1. Log into your ACT! 365 account at <https://app.act365.com>
2. Navigate to **Profile** → **Apps&Integrations** and look at the API Key field. If no key is found, click on the **Regenerate API Key** button to create one. This is the API key that will be used.



act! 365

Account

My Profile

Plans & Billing - *New!*

Security

Preferences

Apps & Integrations

Emarketing

Sending Domain

Profile

Help

Apps & Integrations

Connected Accounts:

Connections to Facebook will allow you to associate profile pictures from this network with your contacts. These connections currently do not import contacts, they are for images only.

Gmail connection allows you to import your Google contacts seamlessly.

Facebook

Gmail

API Key:

Your API (Application Programming Interface) token grants third party applications access to your account. This can be used to connect to a variety of web services. Note that an API key grants full control access to your account and the content in your account. Use of this key may compromise your accounts security and should be used only with integrations you fully trust.

bJCL9bPg63u4yQgn0raHY10y3HxU1yF-9ndBtZVHAtk

If you regenerate this key any existing connected applications will fail to work until you update it.

Regenerate API Key

: Getting Started ^

Figure 2: API Key

Note: The API Key generated in our example is bJCL9bPg63u4yQgn0raHY10y3HxU1yF-9ndBtZVHAtk



FCM630A CONFIGURATION

To configure FCM630A with ACT! CRM, two steps are required

1. **Admin Configuration.**
2. **User Configuration.**

Admin Configuration

This step is required to configure and integrate the FCM630A with ACT! CRM so that it will apply to all FCM630A users that will be start using the ACT! CRM accounts.

ACT! CRM configuration page can be accessed using the admin credentials and navigate **Web GUI**→**Value-Added Features**→**CRM**.

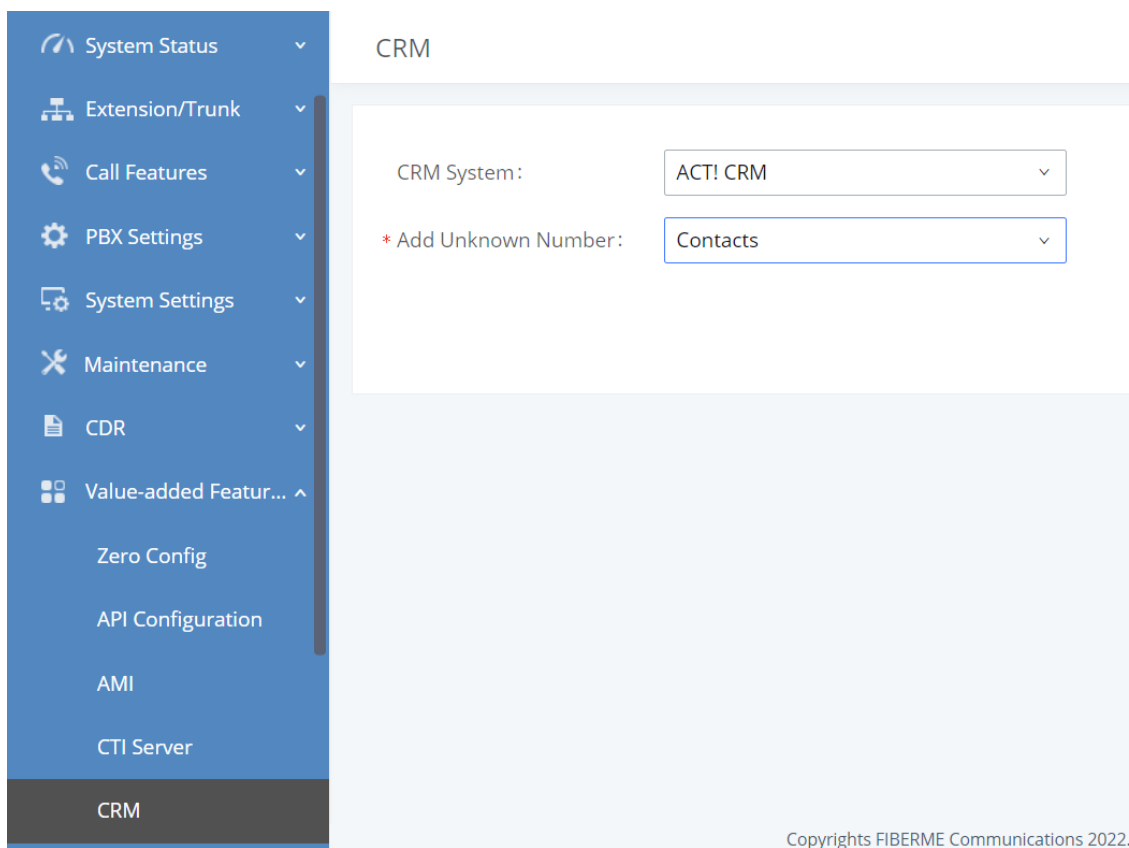


Figure 3: ACT! CRM Settings

1. Select **ACT! CRM** from the “CRM System” dropdown list to use the ACT! CRM and make similar configuration to the above, below are the details:



Table 1: ACT! CRM Settings

CRM System	Allows users to select a CRM system from the drop-down list, choose ACT! CRM to use ACT! CRM.
Add Unknown Number	Allows to automatically save received calls from numbers not previously logged in ACT! CRM and add them.

Once users finish configuring above settings using admin access:

1. Click on **Save** and **Apply Changes**.
2. Logout from admin access.

User Configuration

This configuration is per user, it will allow users to authenticate and sync up with ACT! CRM platform.

Note: Admin Configuration needs to be set before enabling CRM for users.

1. Access to the FCM web GUI as user and go to **User Portal**→**Value-added Features**→**CRM UserSettings**.
2. Click on **Enable CRM**.
3. Enter the **Username** and **Password**, which will be the ACT! CRM account's **API Key** and **DeveloperKey** respectively generated before. Refer to [**Generate API Key**] and [**Generate Developer Key**].
4. Click on **Save** and **Apply Changes**.

The status will change from “**Logged Out**” to “**Logged In**” and users can start using ACT! CRM.

The screenshot shows the 'CRM User Settings' interface. It includes a form with the following elements:

- Enable CRM:** A checkbox that is checked.
- * Username:** A text input field containing the value 'bjCL9bPg63u4yQgn0raHYl0y3HxU1yF-9ndBtZVHAtI'.
- * Password:** A text input field containing the value '93c0fb69ab8c6fe0718f01aa887cc0f4'.
- Login Status:** A field showing the status 'Logged In', which is highlighted with a red rectangular border.

Figure 4: CRM User Settings



Table 2: CRM User Settings

Enable CRM	Enable CRM for the user account.
Username	Enter the generated API key .
Password	Enter the generated Developer Key .

ACT! CRM should now be configured.



CALL POPUP AND CONTACT LOOKUP

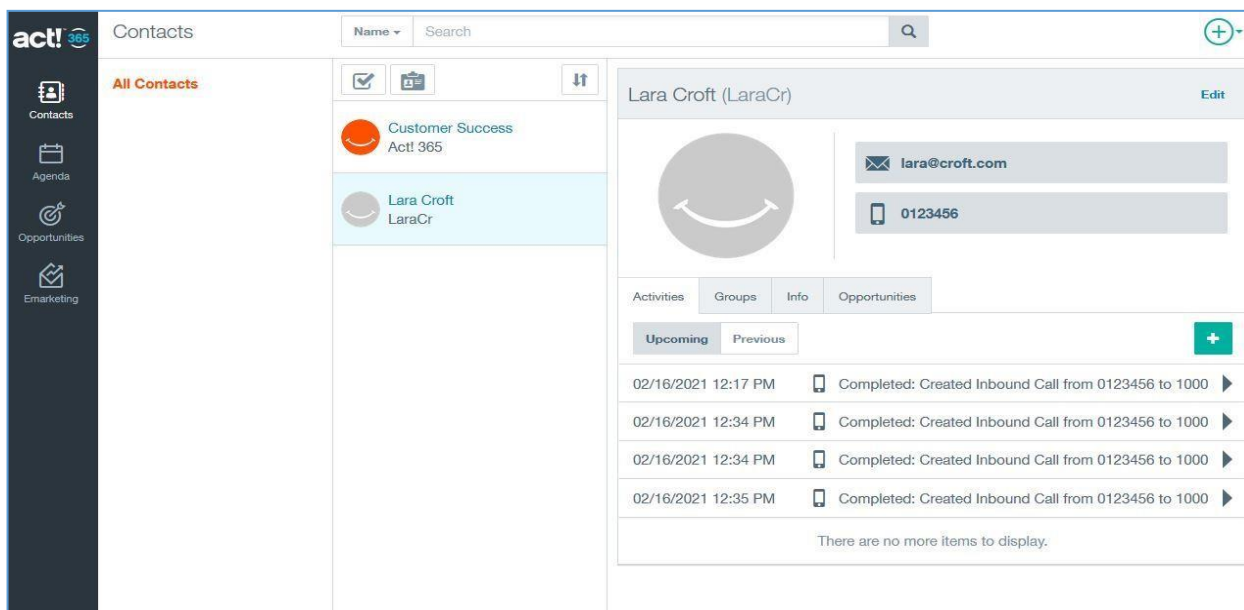


Figure 5: Contact Information

When "Contacts" is configured as [Add Unknown Number] on the FCM, calls that are received from contacts not previously configured in ACT! CRM will be automatically saved and users can after that edit and add them to the list like shown below:



Contacts Name ▾ Search Q +

All Contacts

-
-

0789456

Customer Success Act! 365

Lara Croft LaraCr

No Image ▾

For more photo options, connect to your social accounts

First Name

Last Name

Company

Job Title

Customer Type ▾

Email

Alt. Email

Business Phone

Mobile Phone

Home Phone

Business Address

Street

Address 2 : Getting Started ^

Cancel Save

Figure 6: Unknow Contact



CALL REPORTING

Users can see reports of their calls on ACT! CRM by navigating under Agenda, where they can select a date within the Agenda section and it will show all the activities done or scheduled for that date. If the activity has already been completed please ensure the Completed box is selected when you click the desired date.

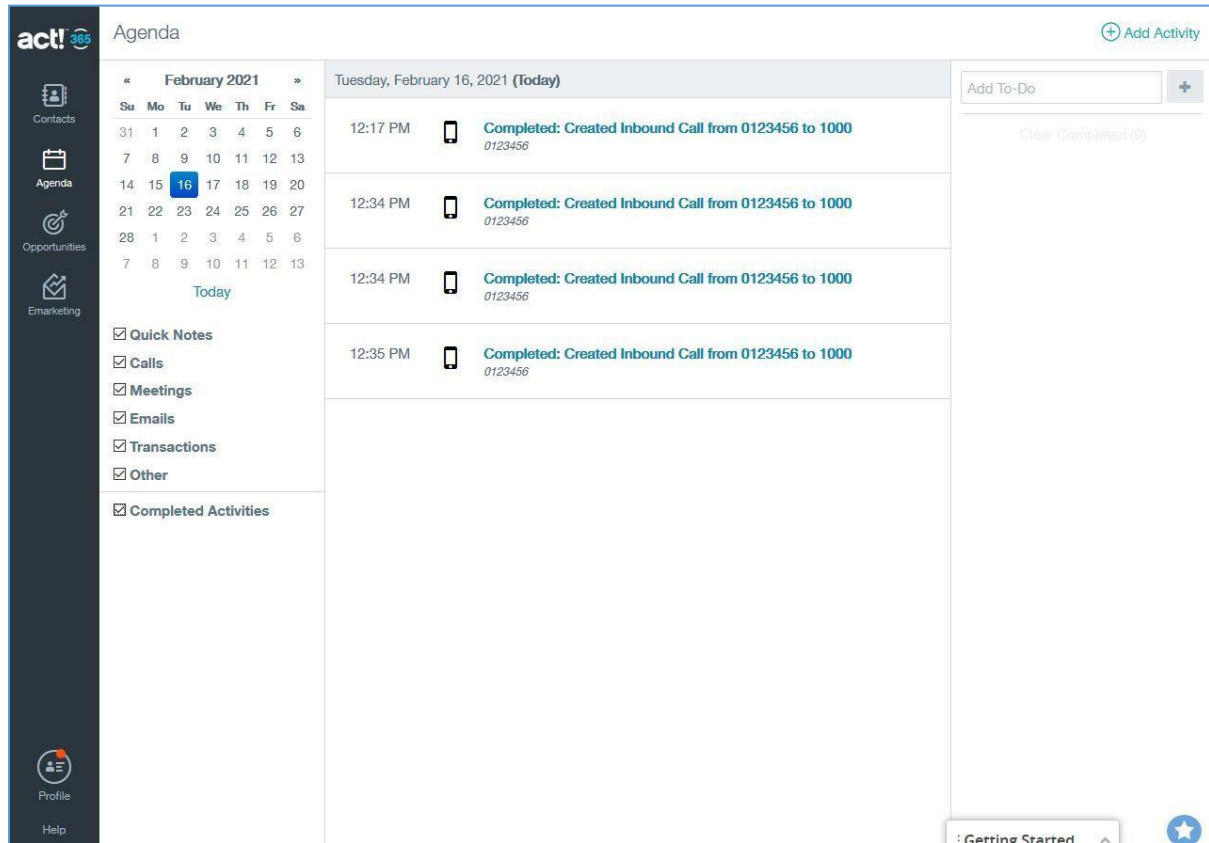


Figure 7: Call Reporting

Users can also view call reports for a specific contact under Contact section, after searching for the contact, the reports will be displayed under Activities.



The screenshot displays the act! 365 CRM interface. On the left is a dark sidebar with navigation icons for Contacts, Agenda, Opportunities, and Emarketing. The main area is titled 'Contacts' and features a search bar with 'Name - Lara'. Below the search bar, there are search results for 'Name - Lara' showing 'Lara Croft (LaraCr)'. The right-hand side of the interface shows the contact's profile for 'Lara Croft (LaraCr)', including a placeholder for a profile picture, email address 'lara@croft.com', and phone number '0123456'. Below the profile information are tabs for 'Activities', 'Groups', 'Info', and 'Opportunities'. The 'Activities' tab is active, showing a list of activities with a 'Previous' button and a '+'. The activities list contains several entries, all of which are 'Completed: Created Inbound Call from 0123456 to 1000' with various timestamps from 02/15/2021 to 02/16/2021. At the bottom of the list, it states 'There are no more items to display.'

Figure 8: Contact's Activities

