

## ConVox CCS Integration with External CRM Application

### 1. External CRM Integration With ConVox CCS

We will integrate web based (External) CRM with ConVox System. When call will connect we will pop up CRM related information.

#### External CRM Data Pop-Up on Agent Screen

When a connected call is transferred to the agent, then following parameters should be used for the External Web Based CRM.

The screenshot shows the ConVox Agent Screen interface. The top navigation bar includes tabs for CRM, SMS, Script, and WebForm. The main content area displays a dashboard with various reports and a sidebar with agent information. A red box highlights the 'Sales force crm integrated in ConVox I-frame' area.

**Agent Information:**

Agent	agent2
Station	1001
Process	ConVox_Process

**ONCALL 00:02:02**

READY BREAK  
REDIAL OUTBOUND

9948933191 Dial

**Queues Waiting**

1-SalesQ	0
2-SupportQ	0

**Caller Information**

NA

**Agent Calls Summary**

Date	Incoming Calls	Abandoned Calls	Outgoing Calls	Total Calls
Sat 05 Aug 2017	0	0	1	1
Total	0	0	1	1

Following are the Parameters to be given from ConVox:-

First External CRM should be called with "POST".

1. “ **AgentID**”: Give the agent ID here to whom you want to transfer the call
- 2.”**CallerID**”: Give the caller phone number here.
- 3.” **CallReferenceID**”: Give the caller reference number here.
- 4.” **DID**”: Give the Incoming DID number here.
- 5.” **ConvboxID**”: Give the ConvboxID (unique ID) generated for this caller
- 6.” **Process**”: Give the Process name here
- 7.” **TypeOfCall**”: Give the Type of call (like Inbound call, Outbound call) here

### On Call CRM Pop up(Sample URL):

**Following is a sample URL format:-In Post Method**

**URL:** https://ServerIP/ salesforce.com/ in/crm

**Method: POST**

**Request Parameters**

**AgentID** = agentid

**CallerID** = callerno

**CallReferenceID**= callreferencenumber

**DID** =Did

**ConvboxID** = convboxid

**Process** = process

**TypeOfCall** = calltype

**Following is a sample URL format:-In GET Method**

**Method: GET**

**URL:** https://ServerIP/ salesforce.com? Agent\_ID=agentid & Caller\_Id = callerno & CallReferenceID= callreferenceno & DID= did & ConvboxID=convboxid& Process=process & TypeOfCall=calltype

### End Call Sample URL:

- In order to end/dispose the call you need to Call our URL with the parameters, so that End call parameter will be saved into our database.
- While calling the End Call API, you can set for Follow Up.

Based on Follow up time, system will instate the call.

### Passing the disposition from External CRM to ConVox-

Before you end the call, Disposition code needs be selected.

Following are the parameters to be given for disposing the call:-

**Following is a sample URL format:-** Post Method

`http://<SERVERIP>/ConVoxCCS/Agent/callcontrol_api.php`

**Method:** POST

**Request Parameters:**

`ACTION=CLOSE&agent_id=agentid`

`Convoxid = convoxid`

`Disposition = disposition`

`mobile_number = mobile_number`

`set_followUp = set_followUp`

`callback_date = callback_date`

`callback_hrs = callback_hrs`

`callback_mins = callback_mins`

**Following is a sample URL format:-** GET Method

**Method:** GET

**URL:**`http://<SERVERIP>/ConVoxCCS/Agent/callcontrol_api.php ?ACTION=CLOSE&agent_id=agentid&convoxid=convoxid&disposition=disposition&mobile_number=mobile_number&set_followUp=set_followUp&callback_date=callback_date&callback_hrs=callback_hrs&callback_mins=callback_mins`

### [Click to Call Integration:](#)

An URL will be provided, that needs to be called on clicking on a number in Customer's CRM. Once the URL is called with the appropriate parameters, ConVox will generate a call.

**Call Status:** After Call completed we will send Call details

**Connected/ Not Connected calls, we will send the call status through the API.**

#### **Parameters Name:**

MOBILE\_NO (Mobile number)

USER\_ID (Agent Id)

CALL\_MODE (Call Mode its predictive/inbound/outbound)

CALL\_STATUS (Call Status its Connected/not connected)

CALL\_DATE (Call Date)

CALL\_HOUR (Call Hour)

CALL\_MINUTE (Call Minute)

CALL\_DURATION (Call Duration)

QUEUE\_NAME

QUEUE\_DURATION

RING\_DURATION

COMPLETED\_BY

FOLLOWUP\_TIME

STATION

LIST\_ID

DID

LEAD\_ID (CONVOXID)

CALL\_REFERENCE\_ID

DISPOSITION (Disposition)

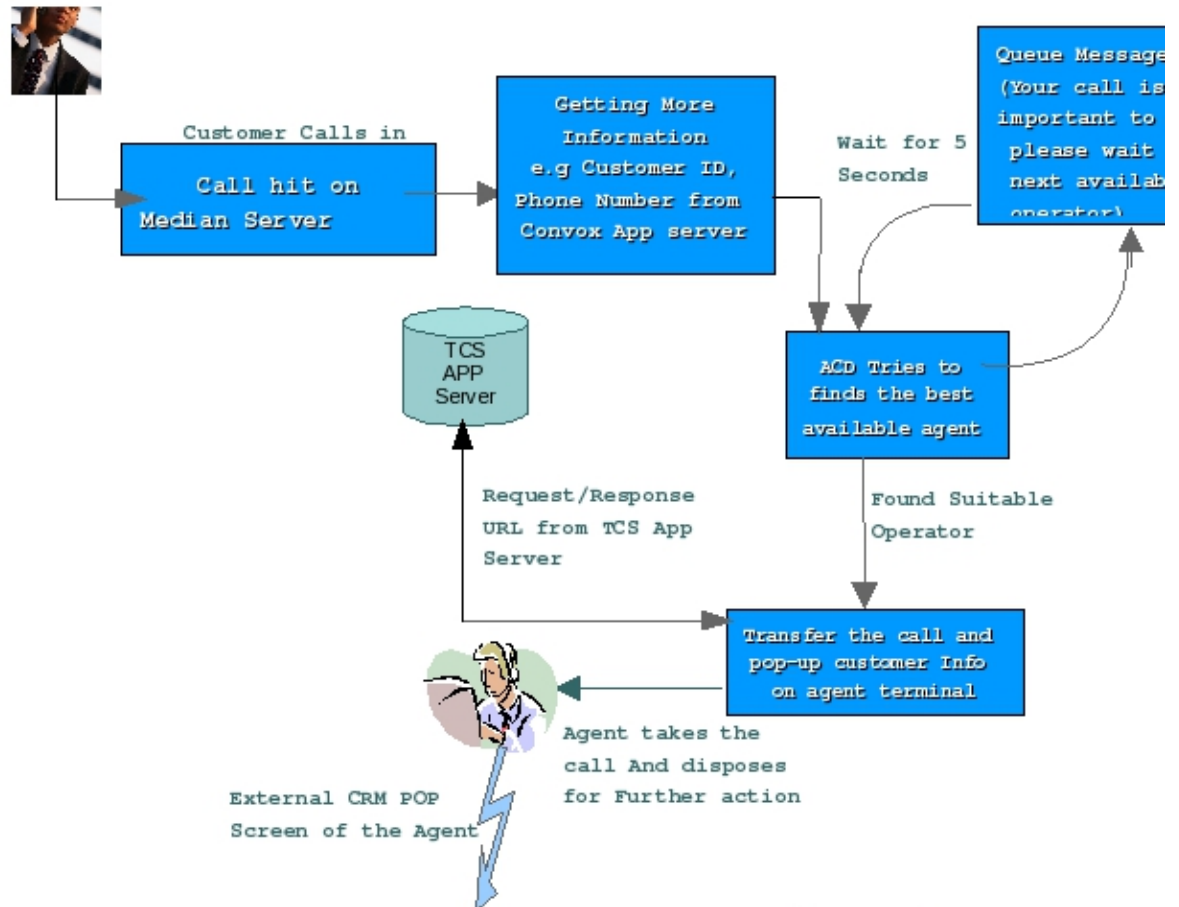
DIALER\_DISPOSITION

PROCESS\_NAME

RECORDING\_FILE\_NAME (Recording file path)

**Note:** These are the parameters which you have create an API, then you have to share us and we will configure in convox server.

## Application Call Flow Diagram



This screenshot shows the sidebar of the Convox application. It includes a table with columns for Agent, Status, and Priority. Below the table are several buttons for actions like 'CALL', 'END', 'HOLD', 'TRANSFER', 'DISCONNECT', 'PAUSE', 'RESUME', 'TRANSFER', 'DISCONNECT', 'PAUSE', 'RESUME'. At the bottom, there are buttons for 'Transfer', 'Action', 'Transfer', and 'Action'.

Agent	Status	Priority
Agent	Idle	Convex_Priority

\*\*\*\*\*END\*\*\*\*\*