CONTACT CRM INTEGRATION

USER DOCUMENTATION

As of: March 2024

CONTENTS

1 INTRODUCTION

Connecting your favourite CRM to Enreach Contact is extremely important to improve customer satisfaction and work more efficiently. With the Contact CRM Integration add-on, Enreach Contact can be integrated with over 175 different CRM solutions. This manual explains how to order the CRM integration add-on and how to set up and configure this service.

1.1 CONTACT CRM INTEGRATION ADD-ON

Contact CRM Integration is an add-on for Enreach Contact that can be ordered for the Expert, Professional or Advanced user profile of Enreach Contact in Operator. It allows pop-ups to be displayed on the user's desktop for incoming and/or outgoing calls. These pop-ups can contain information about the caller or the called party taken from a CRM system. In addition, you can perform various actions from the pop-up, such as opening a customer card, transferring the call, sending an email or starting a chat. To exchange data with CRM systems, Contact CRM integrates Enreach Contact with Red Cactus and the Bubble app.

1.2 RED CACTUS

Using Red Cactus' Bubble integration tool, Enreach Contact can be connected to over 175 CRM applications, including SAP, Microsoft Dynamics, Salesforce, Zoho, DATEV, AFAS and Hubspot. For a full list of supported CRM applications, please visit the Red Cactus Marketplace: https://marketplace.redcactus.cloud.

1.3 FEATURES

For a full list of the Red Cactus CRM integration features, please refer to the service description in the Red Cactus Marketplace.

The following features are available with the Contact CRM Integration:

- Pop-up notification on incoming, outgoing and transferred calls
- Call control button in the pop-up notification (answering and ending calls with one click, initiating calls, holding calls, transferring calls)
- Logging call events (incoming, outgoing, transferred)
- Call history
- Native application for Windows and macOS
- Easy and secure login based on Single Sign On (Microsoft, Google or Apple account)
- Automatic provisioning of customers, users and licenses

1.4 PREREQUISITES

Contact CRM requirements

- Expert, Professional or Advanced user profile
- A Microsoft, Google or Apple account in order to log into the Bubble app
- Enreach Contact web user credentials to connect the Bubble app to Enreach Contact

Bubble app requirements

- Supported operating systems: Windows 10 or later, Windows Server 2019 or later, macOS (Monterey) 12 or later
- CPU: supported architectures x64, arm64, Apple Silicon
- Memory: at least 8GB of RAM
- HDD: at least 1GB of free disk space

2 ORDERING

In order for users to use the CRM integration, they must have the Contact CRM Integration add-on. The Contact CRM Integration add-on must be ordered separately on the Enreach Contact ordering page. Either when ordering a new Enreach Contact user profile, or by making a change order for an existing user.

Once the order is placed, users are automatically provisioned in the Red Cactus cloud. When a user order with the Contact CRM Integration is terminated, that user's user license is automatically deactivated in the Red Cactus cloud.

As Red Cactus only allows Microsoft, Google or Apple user accounts to log in to the Red Cactus cloud and Bubble app, ensure that the email address of the Enreach Contact web user account is either a Microsoft, Google or Apple account.

To order the Contact CRM Integration add-on

1. Open Enreach Contact.
2. Start the ordering process, see also https://help.enreach.com/contact/1.00/web/Enreach/en-US/index.html#context/help/ordering_$.
3. On the **Add-ons** page, activate the checkbox next to **Contact CRM Integration** to order the add-on.
4. Complete the order.
   ✓ When the order with the add-on is delivered, the user is automatically created in the Red Cactus cloud and a license is activated for that user.

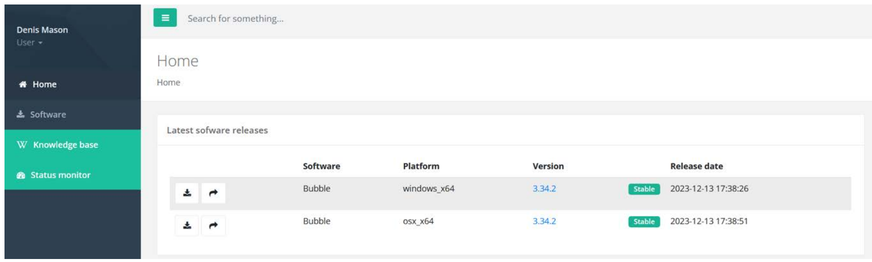
3 CONFIGURING THE CONTACT CRM INTEGRATION

This section describes how to set up the Contact CRM Integration and Bubble app for a user. After logging into Bubble for the first time, you need to configure the CRM Connector. This connects the Bubble application to your CRM system.

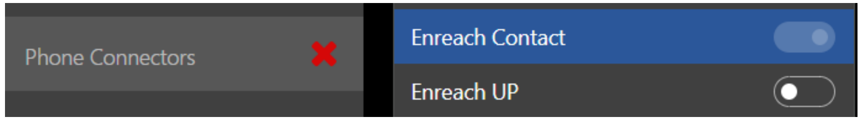
> The configuration and options available depend on your CRM system. See the Red Cactus documentation on how to set up Bubble for your CRM system or contact your provider.

To configure the Contact CRM Integration

1. Log in to the Red Cactus web portal with your Microsoft, Google or Apple account to download the Bubble app: https://portal.redcactus.nl/home.
2. Download the Windows or macOS installer of the Bubble app by selecting the download button.



3. Install the Bubble app on your Windows or macOS system.
4. Start the Bubble app and log in with your Microsoft, Google or Apple account.
   ✓ You are logged in and can configure the connection with Enreach Contact.
5. Open the Phone Connector menu.
6. Activate Enreach Contact.



7. Enter the Enreach Contact web user credentials of the respective user in the Enreach Contact phone connector.

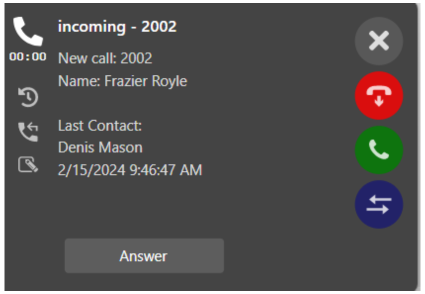
8. Click on Verify to check that the credentials have been entered correctly.
   ✓ If the credentials are correct, a verification message appears.
9. Select the primary phone device, which is used for answering and initiating calls:
   - Fixed
     Select this option, if a fixed phone must be used.
   - Softphone
     Select this option, if a softphone (e.g. Enreach Contact Desktop or Enreach Contact Mobile) is used.
   - Mobile
     Select this option, if a mobile phone should be used.
10. Click on Save.
   ✓ Your settings are saved as a user profile. The next time the user logs in to Bubble, the user profile will be loaded so that the same settings will be applied the next time the user logs in.

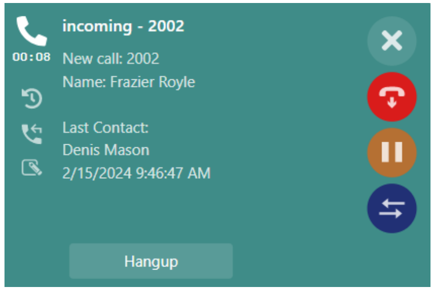
> In the Red Cactus Portal, the Clone Profile module allows a user configuration to be cloned to several other users. In this way the configuration time for one user is almost the same as for 1,000 users. Consult the Red Cactus Portal or contact your supplier for information on how to set up and roll out configurations to multiple users.

3.1 ANSWER/HANGUP BUTTON

You can configure up to 4 buttons in the Bubble pop-up notification. You can create buttons for CRM-ERP specific actions like showing contact information, sending an email, sending a WhatsApp message, opening a search bar, etc.

In addition to these buttons, the Contact CRM Integration provides the option to enable a Call Control button. When this feature is enabled, the user will have a button in the Bubble pop-up notification to answer or hang up the call.



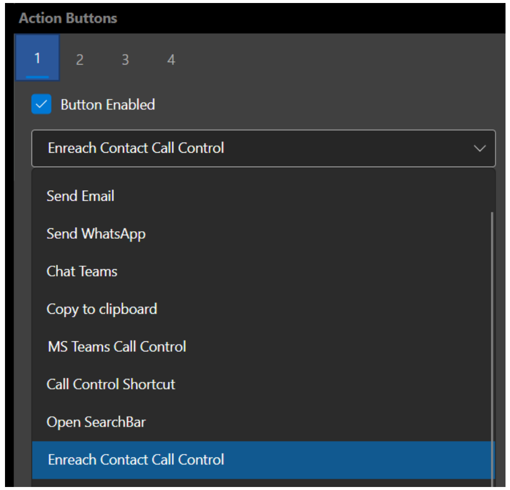


The Answer button is only supported when Softphone is selected as the primary phone and will not work when a fixed or mobile phone is selected.

For more information on which buttons are available for your CRM system and setup, and how to configure them, visit the Red Cactus Portal.

To enable the Answer/Hangup button

1 In the Bubble app, open the Notifications menu.
2 Click on Action Buttons and select one of the tabs.
3 Activate Button Enabled to enable the button.
4 Select Enreach Contact Call Control from the dropdown list.

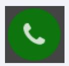


5 Click on Save.
✓ Your settings are saved.

3.2 CALL CONTROL OPTIONS

The Bubble app also supports several call control features, which are available in the pop-up notification as buttons.

For more information about other call options, consult the Red Cactus documentation.

Button	Description
	Close the Bubble pop-up notification
	Decline or hang up the call
	Answer a ringing call (only supported with softphone as primary device)

Button	Description
	Hold the call
	Unhold the call
	Forward or transfer (blind or attended) the call

3.3 SOFTWARE UPDATES

There are three ways to install a new update of the Bubble app:

- Update by installation via MSI
- Update using the Bubble updater
- Manual update in the Bubble app

> For more information on the installation of the Bubble app and how to install the app in a multi-user or multi-tenant environment, please consult the Red Cactus Portal.

Update by installation via MSI

You can download a new version from the Bubble Web Portal and install it over the old version, see *To configure the Contact CRM Integration*. The old version will be automatically removed and the user profile will be preserved.

Update using the Bubble updater

When Bubble is started the app will check for a new update. If a new update is available, a pop-up notification will appear and you can start the installation immediately by clicking on the notification.

Manual update in the Bubble app

To manually update the Bubble app, click on **Application menu** and check under **Software version** if a new version is available. If a new version is available, click on **Update** to install the new version. The old version will automatically be removed and the new version will be installed.