

ICTBroadcast Integration with CRM

User Guide

Thank you for purchasing. If you have any questions that are beyond the scope of this help file, please feel free to email via contact form [here](#). Thanks so much!

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1. Overview - [top](#)

The said integration enable user to communicate directly with his contacts / customers directly from CRM, either using general contacts lists or leads lists or opportunity lists or others. The said integration enable automation of the business process and enable user to add contacts / leads in selected campaigns directly from Vtiger CRM.

2. CRM Integration with ICTBroadcast - [top](#)

The said integration with the use of REST APIs enables automation of the business process and enables the user to add contacts / leads in selected campaigns directly from VtigerCRM.

How to Integrate with ICTBroadcast

Open Menu => Settings => CRM Settings

The screenshot shows the CRM dashboard interface. On the left, a dark sidebar menu contains various modules: Dashboard, MARKETING, SALES, INVENTORY, SUPPORT, PROJECTS, TOOLS, Mail Manager, Documents, Extension Store, and Settings. The 'Settings' option is highlighted, and a sub-menu is open showing 'CRM Settings' and 'Manage Users'. The main content area features a search bar at the top, a header for 'Email Contacts Who Purchased a Specific Product', a 'History' section with a list of administrator updates, a 'Leads by Industry' bar chart, and an 'Upcoming Activities' section.

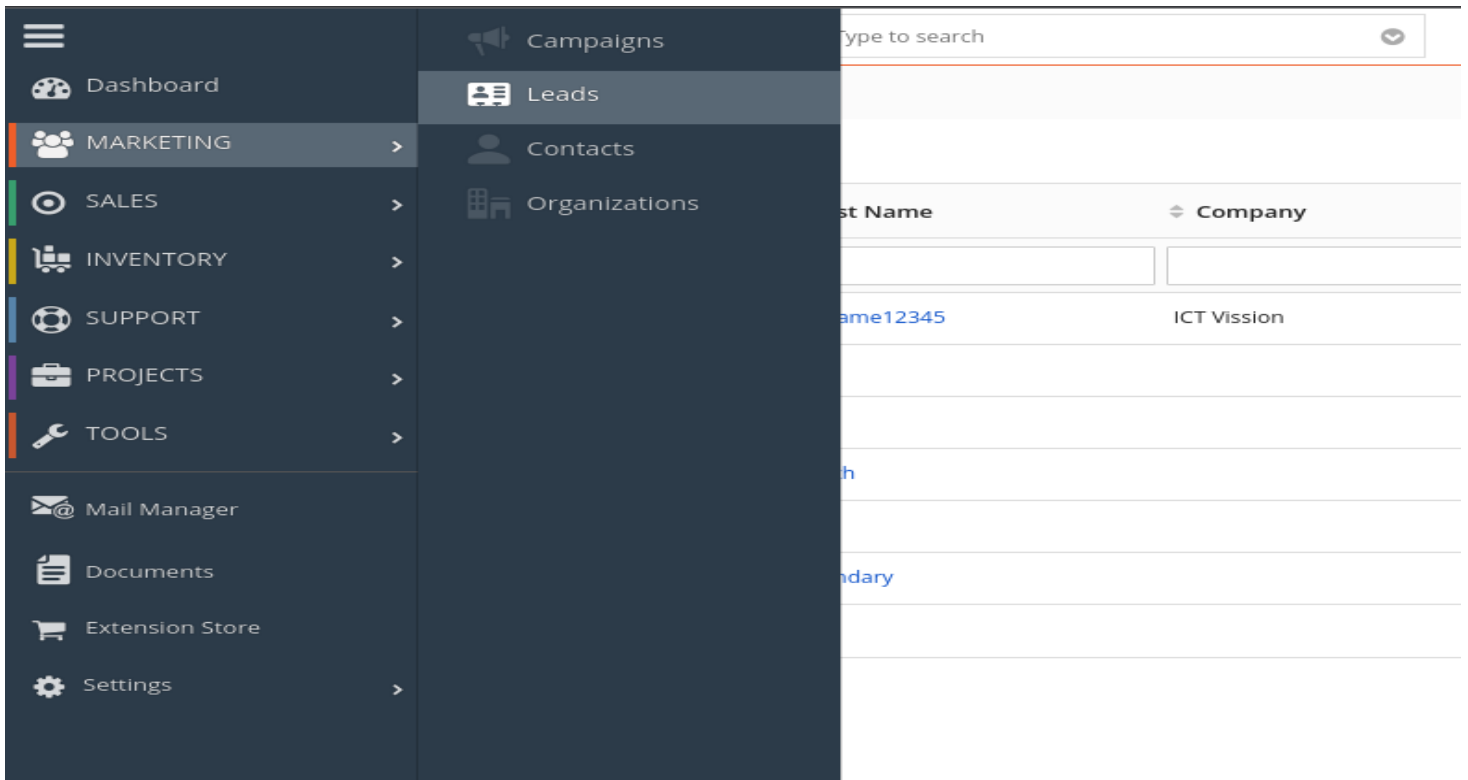
Click on User Management => Users => Add User

The screenshot displays the 'Creating New User' form within the CRM system. The left sidebar shows the 'USER MANAGEMENT' section with 'Users' selected. The main form area is titled 'Creating New User' and contains two sections: 'User Login & Role' and 'Currency and Number Field Configuration'. The 'User Login & Role' section includes fields for ICTBroadcast URL, User Name, First Name, Password, Admin (checkbox), Default Lead View, ICTBroadcast Access Key, Primary Email, Last Name, Confirm Password, and Role (dropdown menu). The 'Currency and Number Field Configuration' section is currently empty. At the bottom right, there are 'Save' and 'Cancel' buttons.

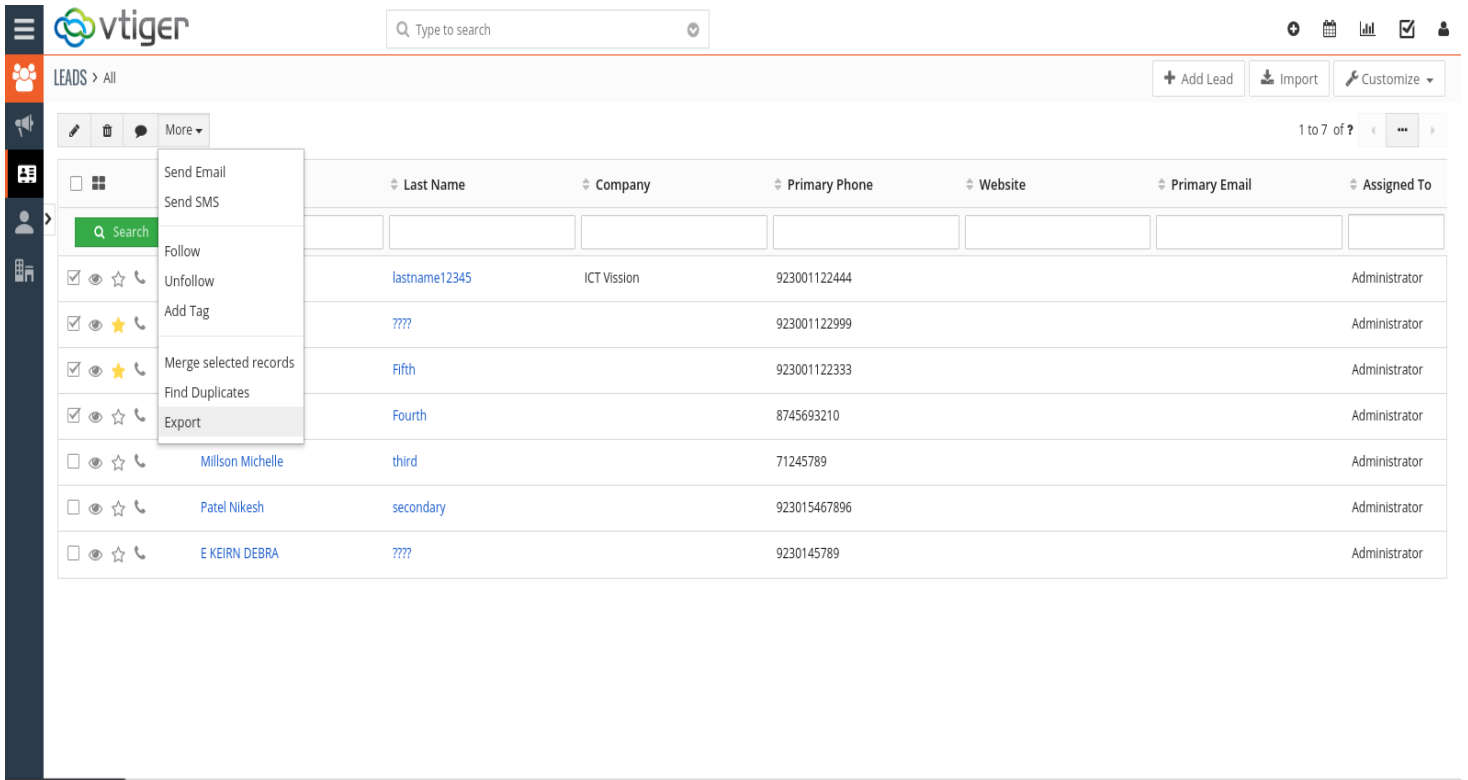
Enter your ICTBroadcast URL and ICTBroadcast accesskey in fields and other user information in fields and click on save button.

How get ICTBroadcast Access Key

Open menu My account => My account => Access Key. You can regenerate accesskey by clicking on Regenerate Button.



Then select lead which you want to add in targeted campaign in ictbroadcast. And select export from More Dropdown Button.



Then a dialog box open. Select campaign and export data and click on Export Leads Button then selected leads export in selected campaign.

vtiger

Type to search

LEADS > All

+ Add Lead

Import

Customize

Export Records

Select Campaign

ict_testt copy

Export Data

☒ Export Selected Records

☐ Export data in current page

☐ Export all data

Export Leads

Cancel

Export Contacts

Open Menu => Marketing => Contacts

Dashboard

MARKETING

>

SALES

>

INVENTORY

>

SUPPORT

>

PROJECTS

>

TOOLS

>

Mail Manager

Documents

Extension Store

Settings

>

Campaigns

Leads

Contacts

Organizations

Type to search

+ Add Contact

Import

Customize

1 to 2 of ?

Then select contacts which you want to add in targeted campaign in ictbroadcast. And select export from More Dropdown Button.

vtiger

CONTACTS > All

1 to 2 of ?

Last Name	Title	Organization Name	Primary Email	Office Phone	Assigned To
apiUpdateLastName				923001122123	Administrator
Innovation		ICT INNOVATION		061741021	Administrator

Then a dialog box open. Select campaign and export data and click on Export Contacts Button then selected leads export in selected campaign.

vtiger

CONTACTS > All

Export Records

Select Campaign: webTest

Export Data:

- ☒ Export Selected
- ☐ Export data
- ☐ Export all

webTest
TEST 1
test fax campaign
test agent campaign
manual_campaign copy
agent campaign
testfaxcampaign
DACIANSMS copy
15July22 AM copy

Export Contacts Cancel

II) Do Not Call List - [top](#)

There will be an option in CRM user can set lead status to DoNotCall during lead creation.

Open Menu => Marketing => Leads => Add Lead. A form will be open.

vtiger

LEADS > All > Adding new

Creating New Lead

Lead Details

First Name	None	Last Name *	
Primary Phone		Company	
Mobile Phone		Designation	
Fax		Lead Source	Select an Option
Primary Email		Industry	Select an Option
Website		Annual Revenue	\$
Lead Status	Select an Option	Number of Employees	
Rating	Select an Option	Secondary Email	
Assigned To *	Administrator	Email Opt Out	<input type="checkbox"/>
Amount		Destination	

Save Cancel

Then select Do Not Call option from Lead Status Dropdown. And add firstname, lastname, phone number and other information in fields and click on save button.

vtiger

LEADS > All > Adding new

Primary Phone		Company	
Mobile Phone		Designation	
Fax		Lead Source	Select an Option
Primary Email		Industry	Select an Option
Website		Annual Revenue	\$
Lead Status	Select an Option	Number of Employees	
Rating		Secondary Email	
Assigned To *		Email Opt Out	<input type="checkbox"/>
Amount		Destination	

Select an Option

Contacted

Hot

Junk Lead

Lost Lead

Not Contacted

Pre Qualified

Qualified

Warm

Do Not Call

Address Details

Street		PO Box	
Postal Code		City	

Save Cancel

III) Delete Synchronization - [top](#)

The integration must also allow to delete records from the dialing list automatically, before the call is triggered (directly in the CRM). i.e A record deleted in CRM will be deleted from the dialing list of ICTBroadcast automatically, and should not be attempted.

vtiger

LEADS > All

More

Delete

		First Name	Last Name	Company	Primary Phone	Website
<input type="checkbox"/>	<input type="text" value="Search"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	APIupdate4	lastname12345	ICT Vision	923001122444	
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	JACKSON WILLIAM	????		923001122999	
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Dalton Kathleen	Fifth		923001122333	
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Frost Karen	Fourth		8745693210	
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Millson Michelle	third		71245789	
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Patel Nikesh	secondary		923015467896	
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	E KEIRN DEBRA	????		9230145789	

I) Disposition Management - [top](#)

Dashboard

MARKETING

SALES

INVENTORY

SUPPORT

PROJECTS

TOOLS

Mail Manager

Documents

Extension Store

Settings

Email Templates

Rss

Our Sites

Recycle Bin

PBX Manager


Disposition

type to search




+ Add

Assigned To	Created Time
Administrator	06-23-2022 2:07 PM
Administrator	06-21-2022 2:04 PM
Administrator	06-17-2022 3:52 PM

Open Menu => Tools => Disposition => More => Export



Type to search



DISPOSITION > All

Export Records

Export Data

☒ Export Selected Records

☐ Export data in current page

☐ Export all data






Export Disposition

Cancel

4. Combined Report - [top](#)

VtigerCRM allow to see reports, for example this month activities, last month activities,contact by accounts etc. These reports must contain lead status report that comes from contact center, such as call status, total amount, destination etc.

Admin can check report. Click on report button that appear on right top corner.



Print

Export CSV

Export Excel

Click on Reports => Lead Status Report then lead status is displaying.

Lead Status Report

Total records : 7

Print Export CSV Export Excel

[Modify Conditions >](#)

First Name	Last Name	Primary Phone	Company	Lead Source	Lead Status	Amount	Destination	Source	Action
Patel Nikesh	secondary	923015467896			completed	90	Pakistan Mobile Mobillink	IMPORT	View Details
Frost Karen	Fourth	8745693210				150	Pakistan Mobile Mobillink	IMPORT	View Details
APIupdate4	lastname12345	923001122444	ICT Vission	Cold Call		40	Pakistan Mobile Mobillink	CRM	View Details
Millson Michelle	third	71245789			Do Not Call	0		IMPORT	View Details
JACKSON WILLIAM	????	923001122999			Qualified			IMPORT	View Details
E KEIRN DEBRA	????	9230145789						IMPORT	View Details
Dalton Kathleen	Fifth	923001122333						IMPORT	View Details

5. Add Integration in ICTBroadcast - [top](#)

We need to update some VtigerCRM fields after call completion therefor integration creation required. Click on message => integration => add integration. Select "vtiger http request" from integration type dropdown. Add vtigerURL in remote url field and add vtiger username and vtiger_accesskey (You can get access key from Settings => Manage User, Under User Advanced Options block). Insert token (campaign_id,spool_id,contact:contact_id,call:status,campaign:name) in request data field and save it.

ICT Broadcast

123

Logged in as: raza

English, American

MENU

Dashboard

Campaigns

Contacts

Messages

Recordings

FAX Documents

SMS

Email Templates

IVR

Integrations

Message Designer

Dialogue / Scripts

Disposition

Administration

Billing

My Account

Reports

Integration Info

Integration Name

test

Integration Type

Vtiger Http request

Description

Integration Configuration

Remote URL

https://abcd1283.od2.vtiger.

Vtiger User Name

admin

Vtiger AccessKey

eCBpmswaW4kaaTHCm

Http Method

GET

Request data

[campaign_id][spool_id]
[contact:contact_id]
[call:status]
[campaign:name]

insert token

Save

Reset

Cancel

Select created integration in 3rd party integration block during campaign creation.

ICT Broadcast

1

2

3

Logged in as :

raza

English, American

MENU

Dashboard

Campaigns

Campaigns Management

Inbound Campaigns/DIDs

Campaign Default Settings

Contacts

Messages

Administration

Billing

My Account

Reports

Agent Evaluation

Agents

Settings

Max. Concurrent Channels

Max. Retries

Suggested dialing order

Max. Call Duration in seconds

Max. ring time in seconds

Campaign Schedule

Start Campaign

Stop Campaign

3rd party integration

Request (Call End)

Agent (External: 12345)

ThomasAgent (Agent: 10005)

ThomasAgent (Agent: 10006)

2

[Disabled]

Repeat primary

600

45

Immediately

None

vtigerTest

testVtiger

vtigerTest

Save

Reset

Cancel

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