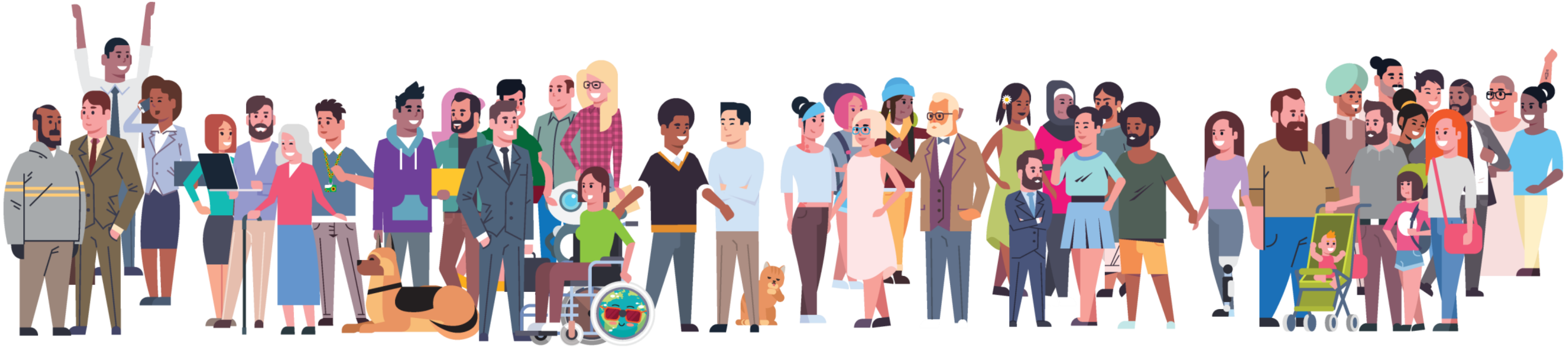
partner
CRM

Product Overview



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Mondago Partner Use Only

Applies to partnerCRM v5.1.1

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- This presentation contains forward-looking statements that involve risks, uncertainties, and assumptions. Future products provided may differ materially to the statements presented here.

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Introducing Mondago

- Formed in 2001, based in Peterborough (UK).
- Specialising in Computer Telephony Integration (CTI).
- Working with manufacturers and service providers for CRM integration.

What is CRM integration

- In the context of the solutions provided by Mondago, CRM Integration means increasing user / agent productivity by using information available from a telephone call to automate routine tasks the user will undertake in a CRM system in conjunction with their telephony service
- We use the term “CRM” generically to represent an application with a contact management database i.e. the application does not have to be a classic CRM, it could be a support desk or accounts system application etc.

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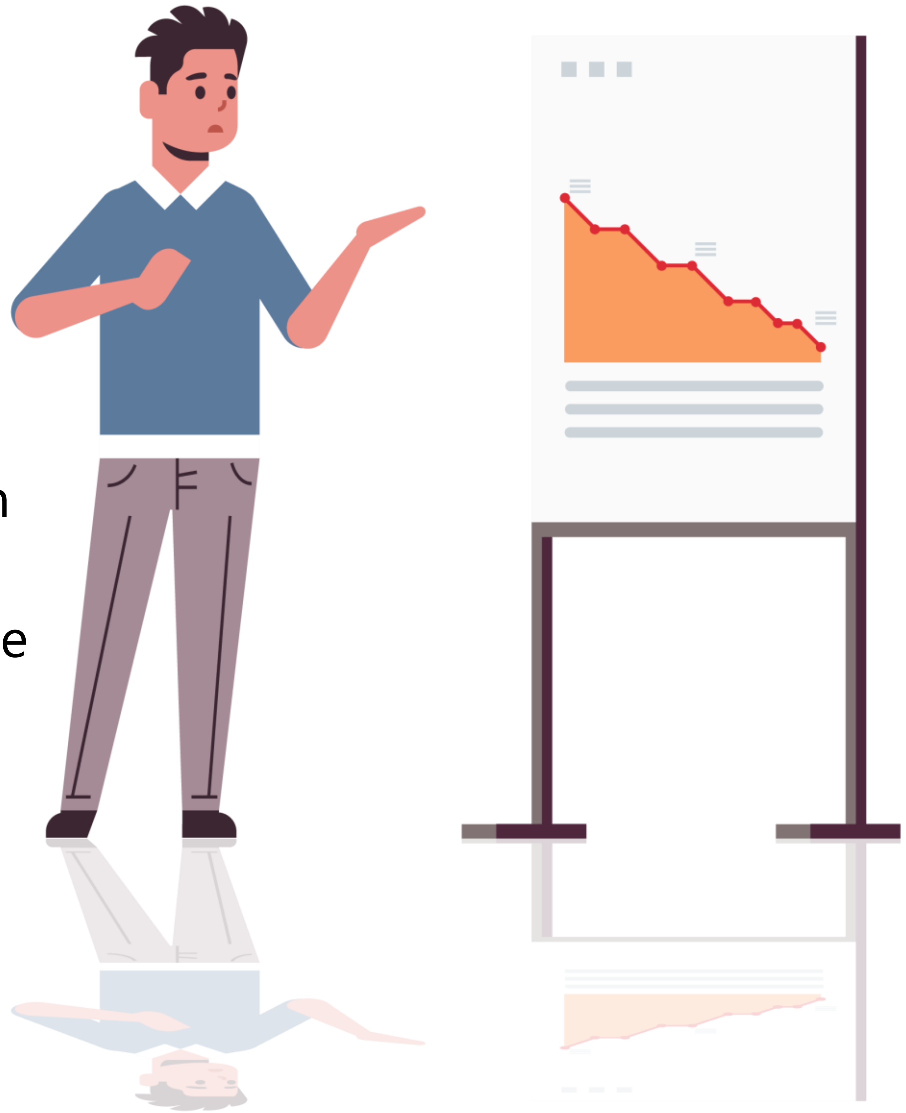
What is partnerCRM?

- **partnerCRM** is an OEM level application that allows a partner to incorporate Mondago's CRM integration libraries into their own desktop UC application
- Access to the libraries is through a REST API included with the installation
- The libraries provide integration to a comprehensive range of CRM and contact orientated business applications
- PC / Windows integrations in excess of 250 and growing
- Mac / OSX client in excess of 10 and growing
- A extensive range of click to dial techniques are also provided.



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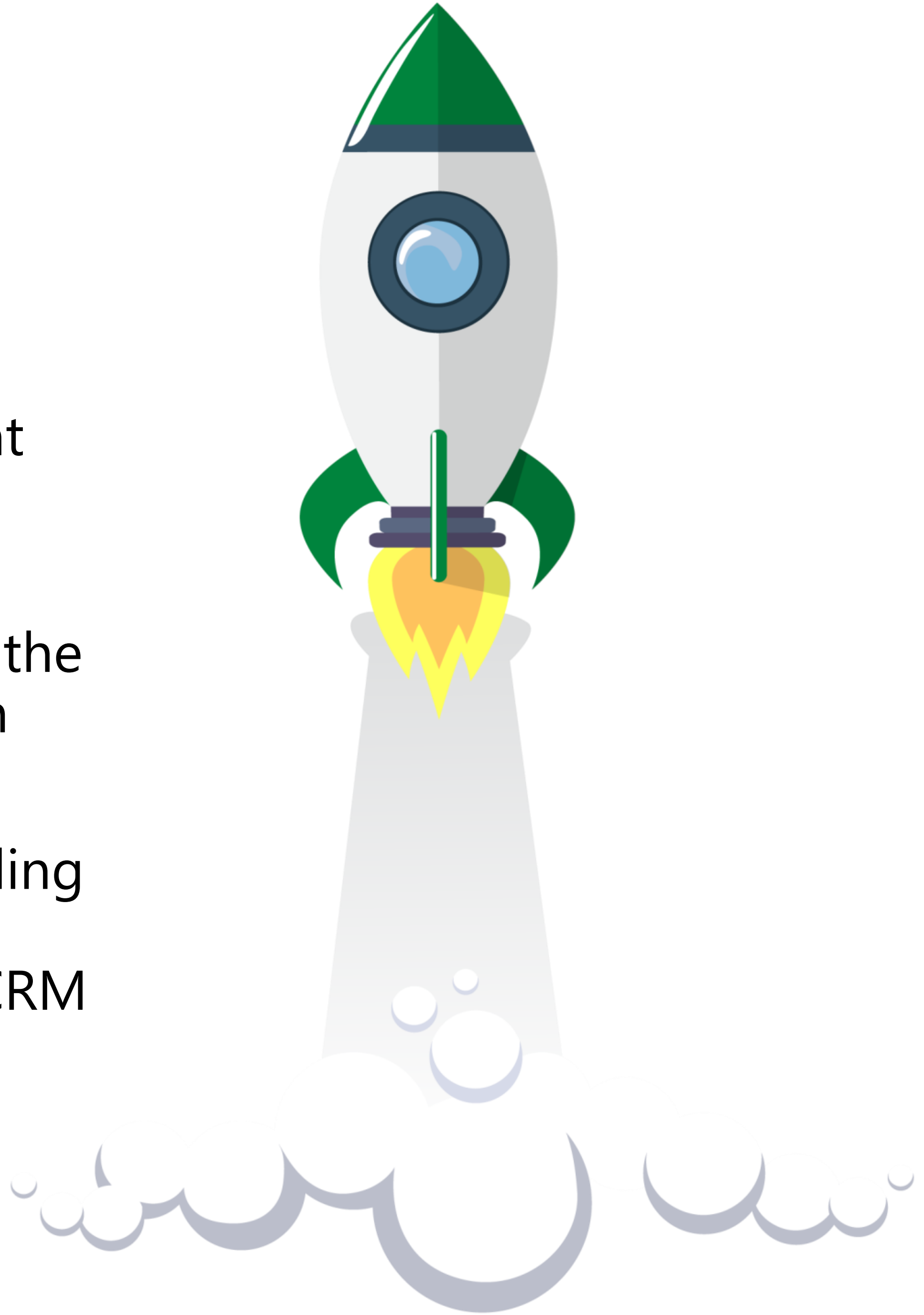
Implementing partnerCRM?

- The partner would modify their own desktop client (Partner Desktop Client or PDC) to add the CRM integration features available through the API
- The partnerCRM libraries and API are installed on the end user desktop either independently or through the Partner’s own installation process (preferred)
- The partner acts as the licensor and partner branding is applied to the partnerCRM component of the solution. References to Mondago and/or partnerCRM within the branding are removed.



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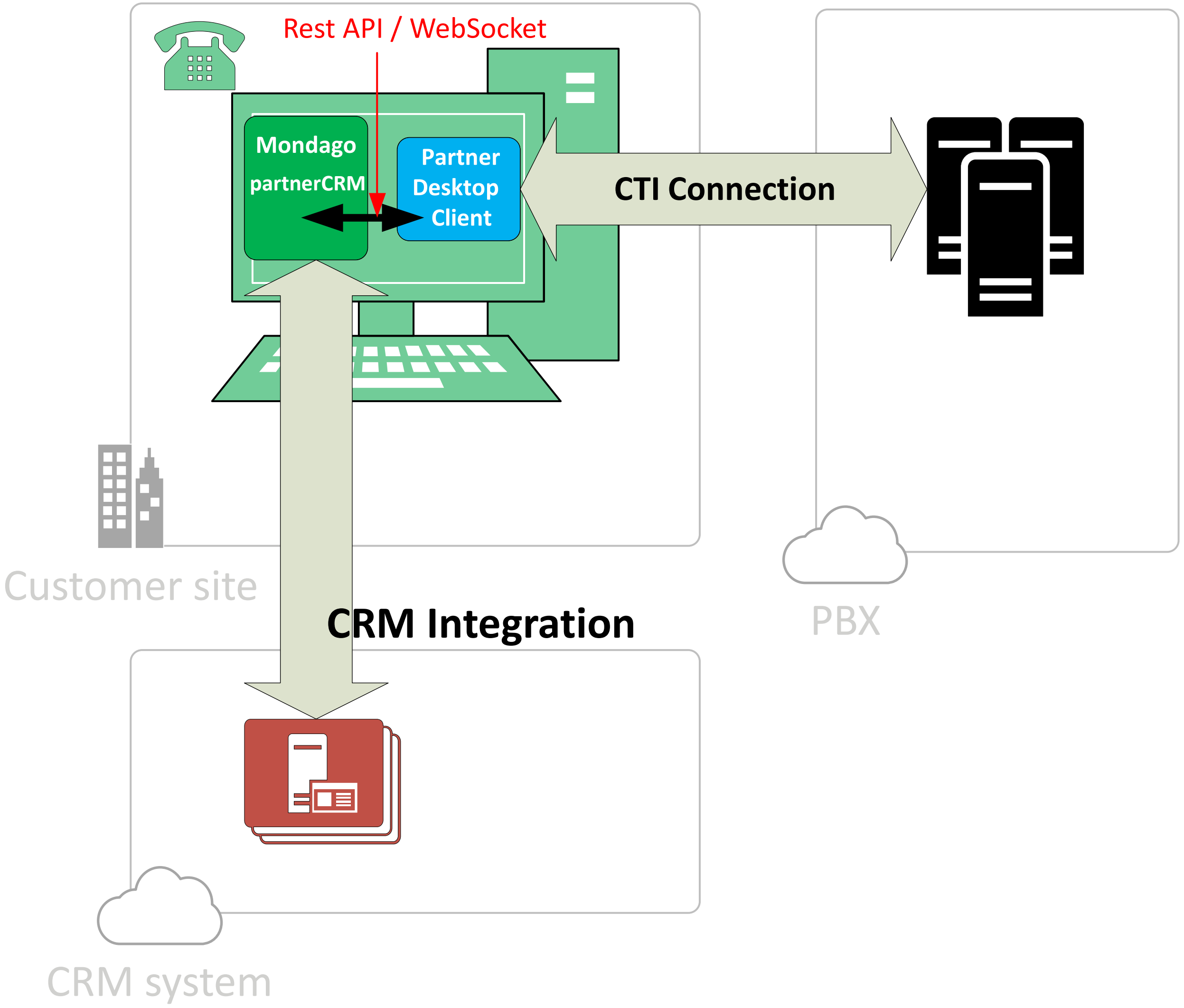
API Details

- The **partnerCRM** API is a REST API with a WebSocket for events
- The API is presented by a Windows / Mac OSX desktop client
- An online test harness / API explorer is available at

  https://api-partnercrm.mondago.com/



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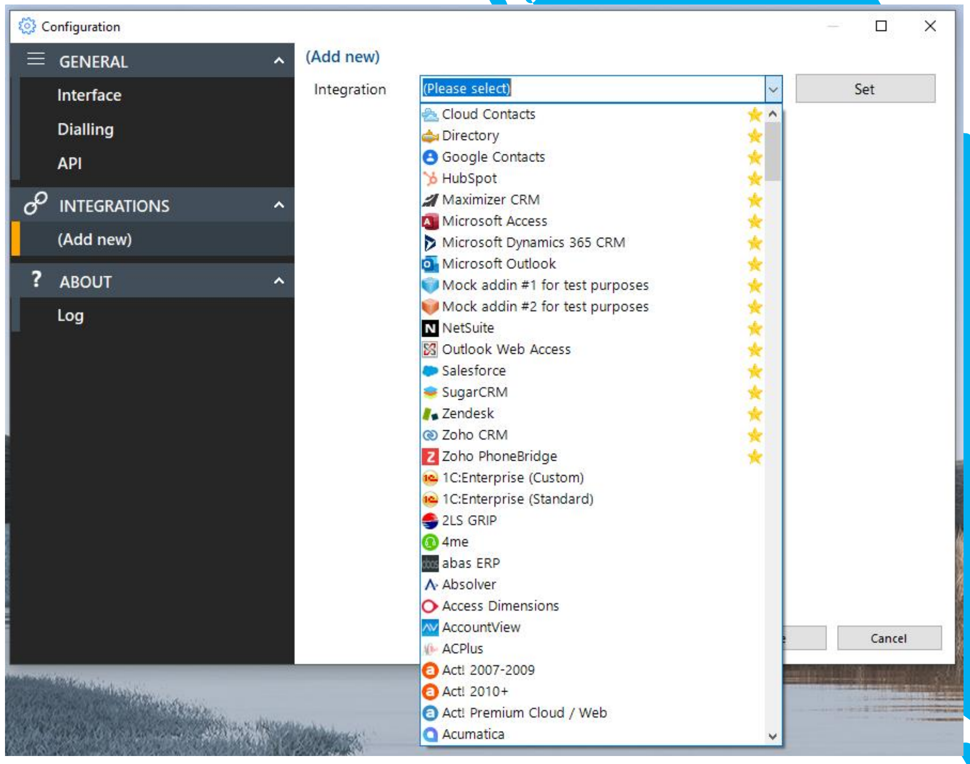
Features

Configuring integration to a CRM application

- The CRM configuration screen is accessed (opened) from the Partner Desktop Client (POST ShowWindow)
- A list of “Standard” Integrations is presented to the user (see later for definition of a Standard integration)
- Each CRM integration is individually configured by the end user as required
- CRM Configuration can be tested using the integration test section
- Each CRM configuration page has a link to an online configuration Guide
- CRM configuration details are securely stored in the user's local desktop environment.
- New Standard Integrations continually added with each new release of **partnerCRM**.



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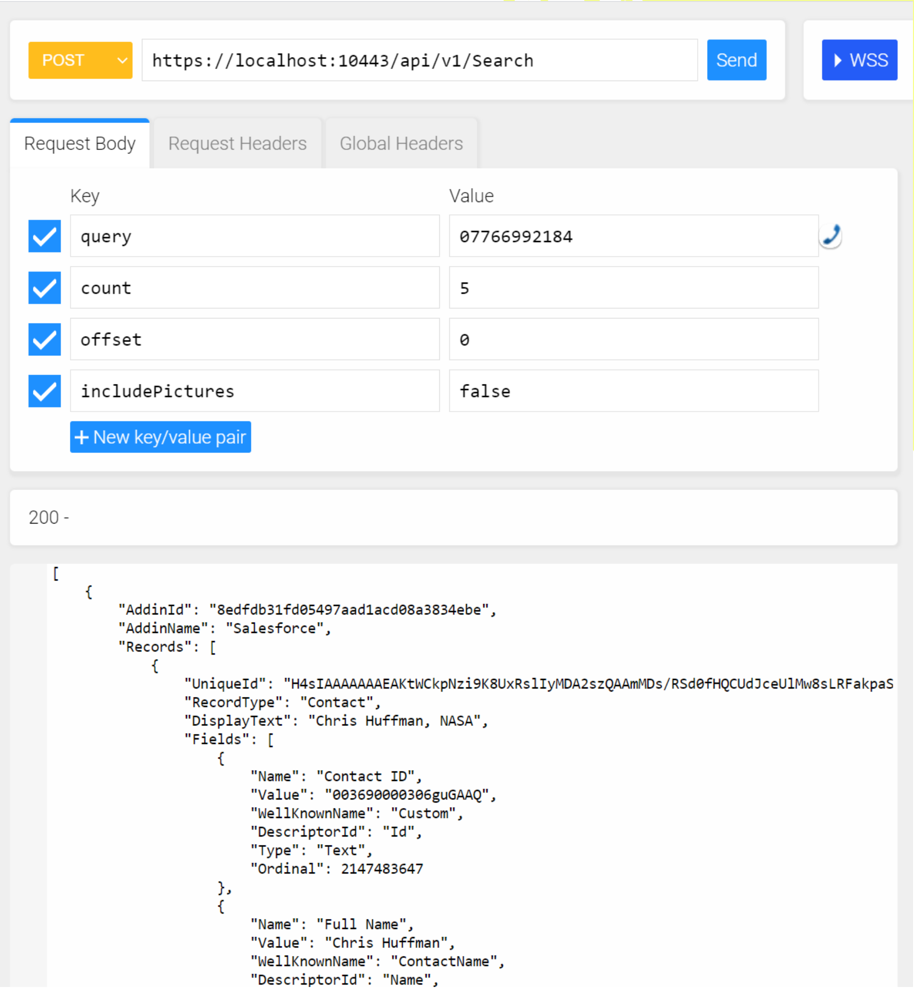
Features

- Once a CRM is configured a number of integration related commands are available (see next two slides)
- The API also makes Events available through a WebSocket, one of the most significant being “MakeCallRequest” which will pass numbers to the Partner Desktop Client from the “Click to dial” techniques available with **partnerCRM** (see later)

POST Search

- This allows the Partner Desktop Client to use the callers number or name to search the integrated CRM and (if a match is found) provides information for **"Caller Preview"** and connected Actions such as:
  - Pop contact in CRM
  - Pop contact in CRM in Edit mode



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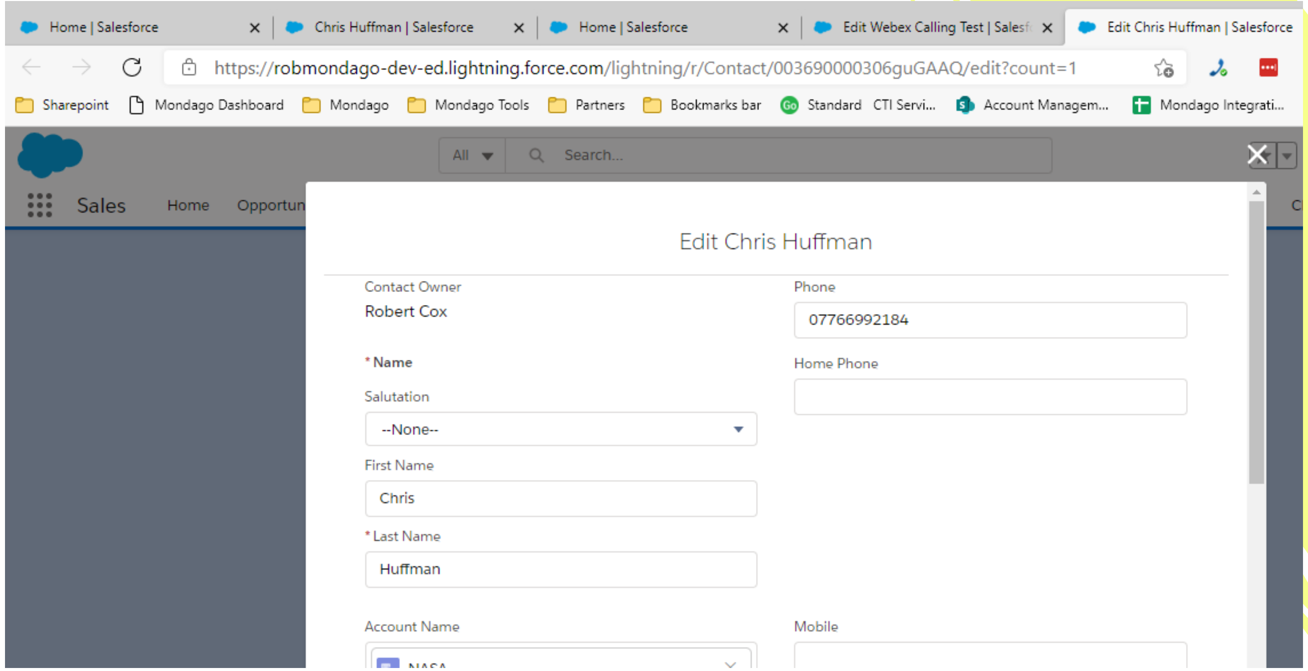
POST DoAction

- Post DoAction is the command that takes information from POST Search to pop the contact or add an Activity record

Note: DoAction will be extended to support other future planned features.



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Application integration Examples

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Application Integration

- The **partnerCRM** client and associated API allows a developer the potential of enabling the following features
  - Caller Preview
  - Contact Popping
  - Activity Logging
  - Contact Searching
  - Click-to-dial

These slides show how Mondago make the features available in their own UC client products and provide examples of what can be done.

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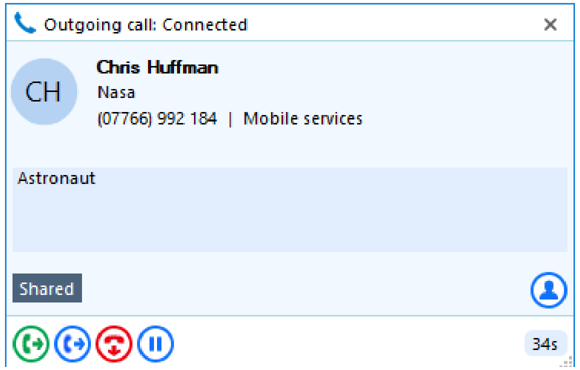
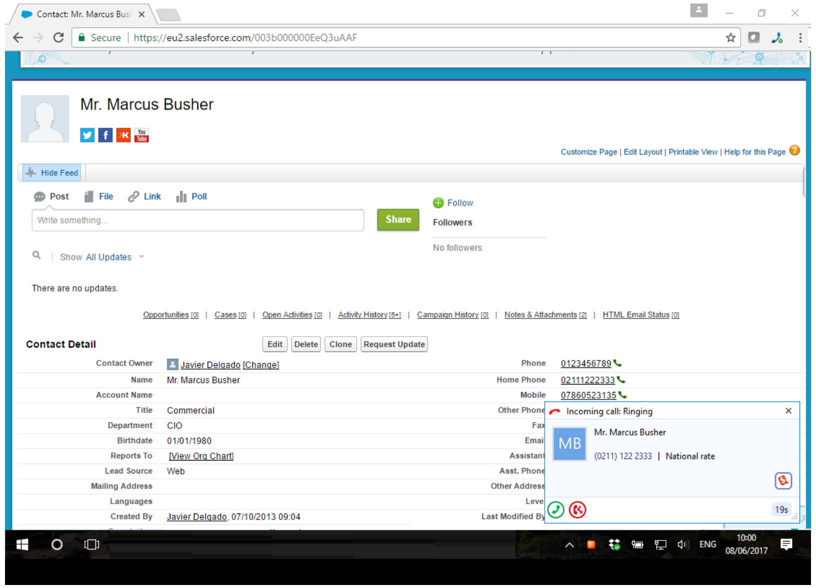
Caller Preview

- Displays caller (or called party) name in a “Preview” window when a match against is found in the directories, or integrated application(s).
- Data shown from CRM includes Name, Company, Description/Note



Contact Popping

- Clicking a link presented in the Preview window could be used to pop the CRM Contact record



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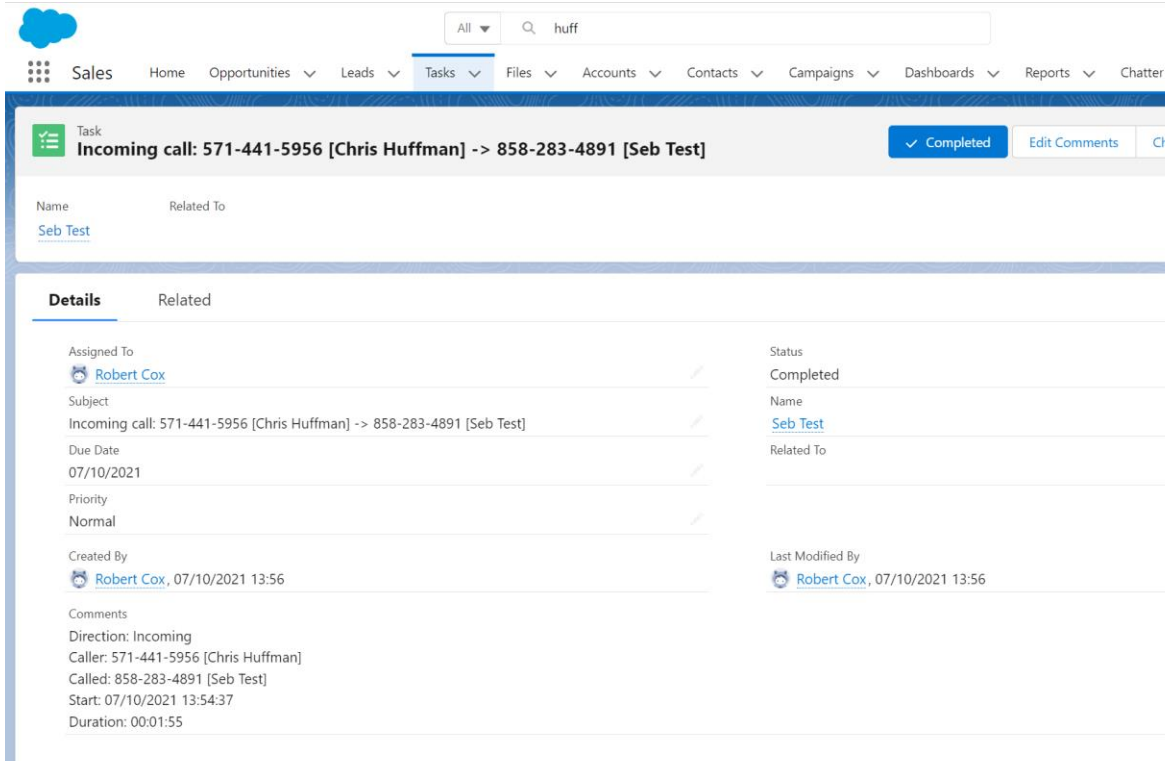
Activity Logging

- Activity Logging: write call event transaction log data into the CRM history
- Example shows how this might work with Salesforce



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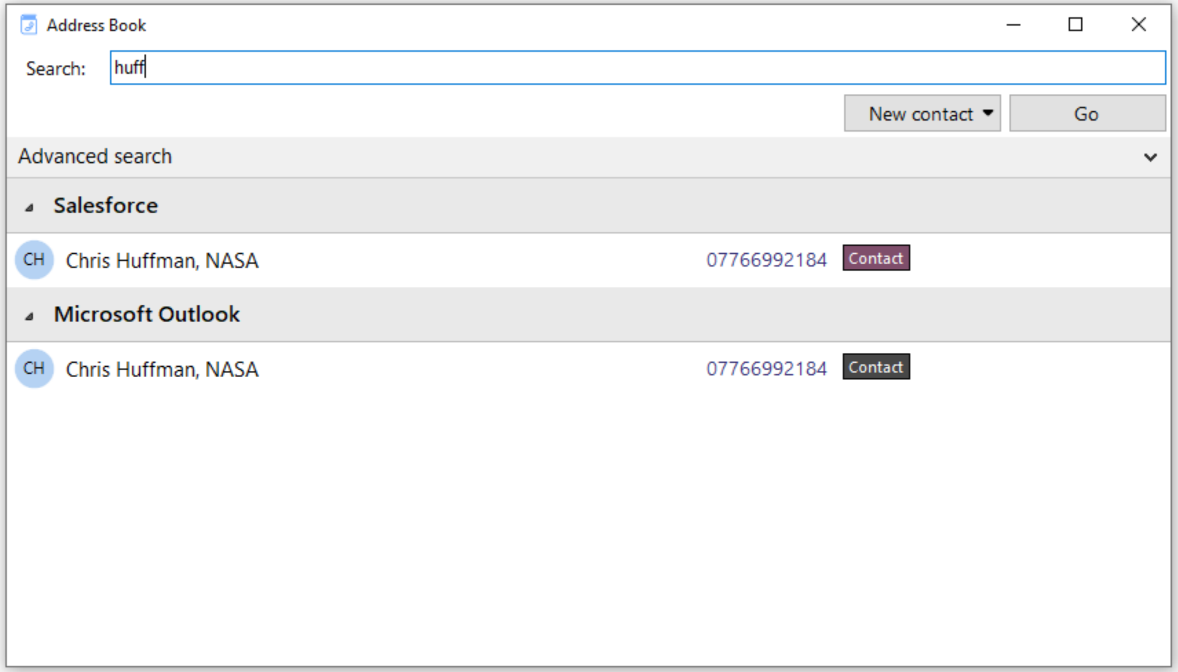
Address book searching

- Concurrently search any integrated applications, then click on the name in the results to dial them or pop the contact record.



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Planned for future release

The following items are under consideration for a future release but not yet scheduled

- Add new contact to CRM
- Providing Call Events to the CRM (e.g. Ringing, Answer, Hold etc)

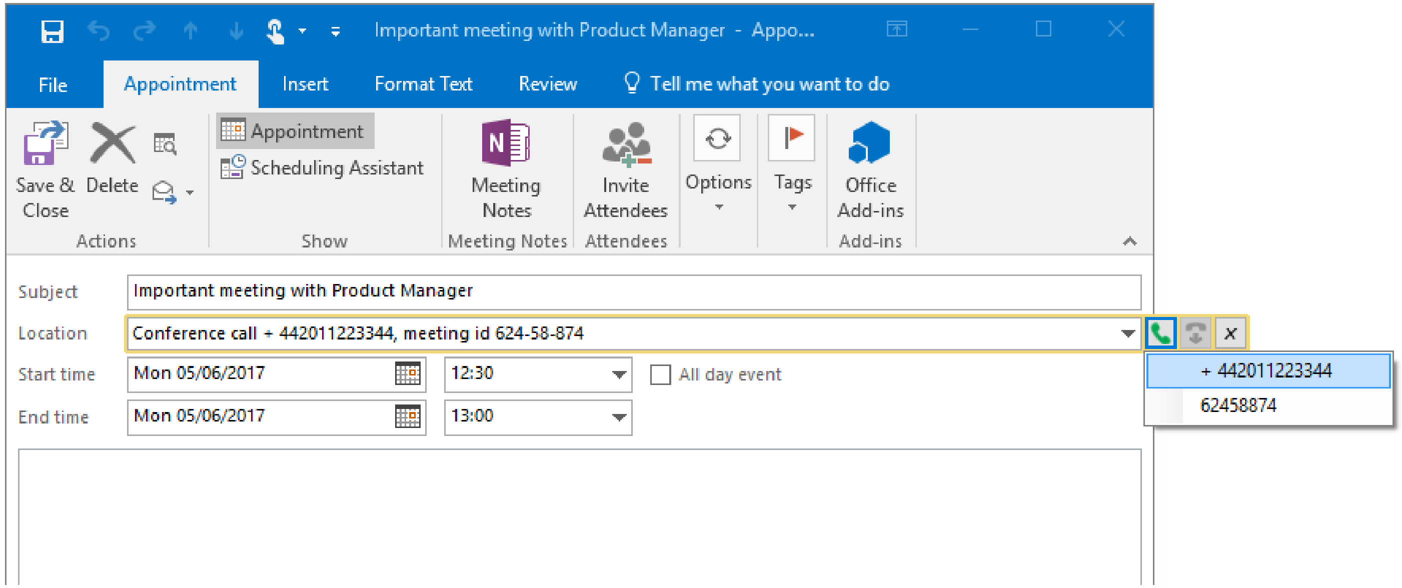
Click to dial techniques

Click to dial/Click to call

- **partnerCRM** provides an extensive range of “Click to Dial” techniques.
- The number to dial is presented to the Partner Desktop Client through the Event Websocket
- Full range of “click-to-dial” options available -
    - Focus (PC only)
    - Clipboard
    - Screen Read (PC only)
    - Web page
    - TAPI (PC only)
- Each method to needs to be configured by the end user – there is usually one preferred method for a CRM.

Focus dialing

- Automatically detects fields which contain a dial-able number and presents a dial button.
- Just click to dial the number.



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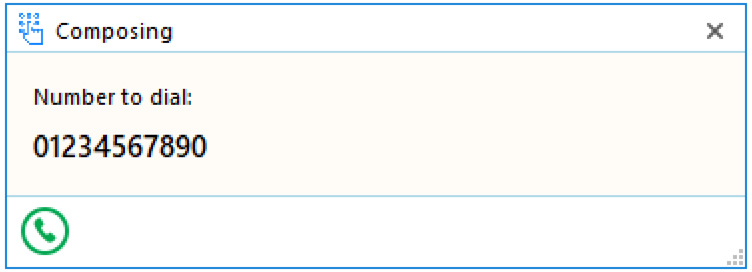
Clipboard dialing

- The Windows Clipboard is monitored by the **partnerCRM** client.
- If what appears to be a phone number is copied into the clipboard….a window is displayed offering the opportunity to dial the number.
- Click the number to dial it.



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Screen Read dialing

- Allows any telephone number visible in Windows applications, documents, email signatures or even images containing phone numbers to be dialed.
- Position the mouse cursor over the number to dial and hold **CTRL+SHIFT** to activate the “capture” box.

The “capture” box will automatically convert anything that appears to be a telephone number into a click to dial button – just click the number to dial.

- NOTE: Not every image may be readable due to certain conditions – e.g. digits should be horizontal and must fit within the capture box.

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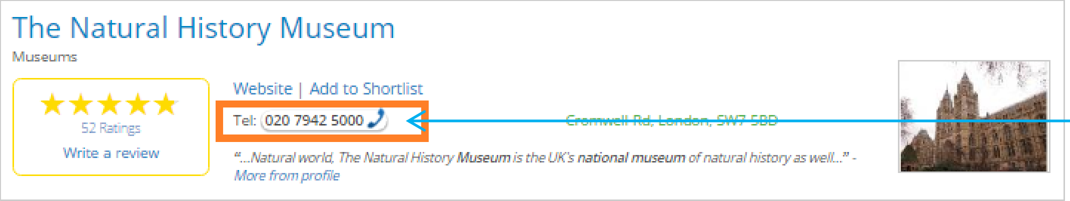
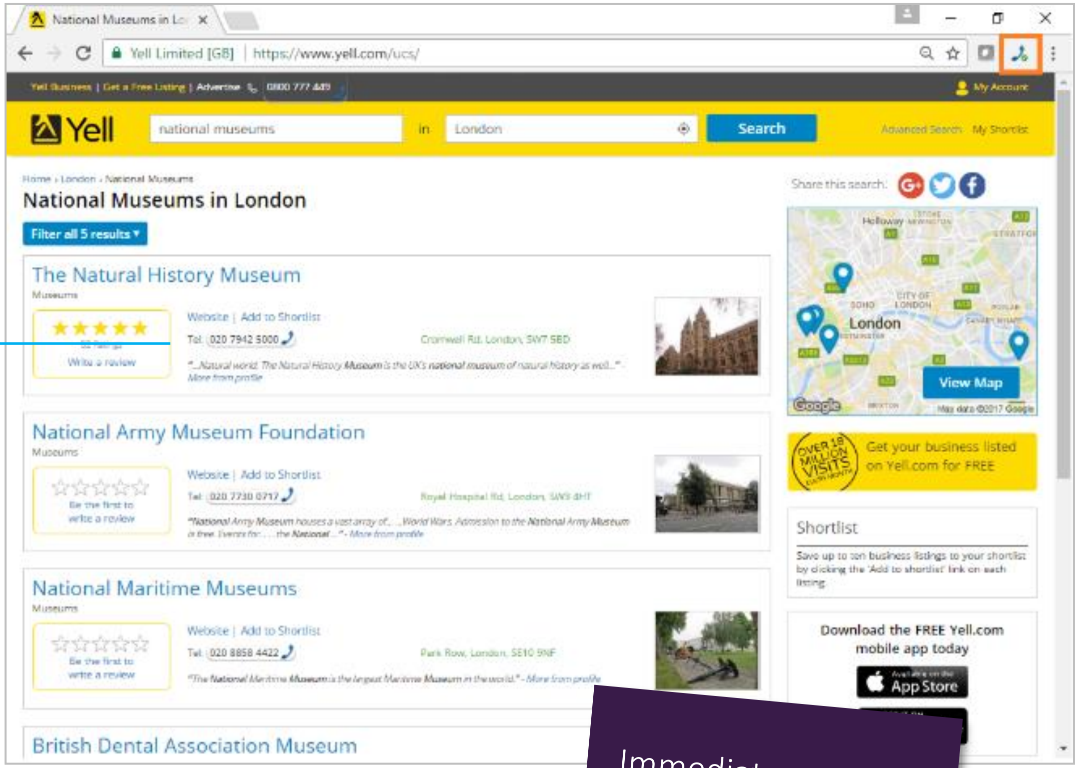
Web page dialing

- Recognises telephone numbers on web pages.
- The number is displayed as a hyperlink.
- Click on the link to dial it.





Immediate access to a range of numbers.

All with a single click!

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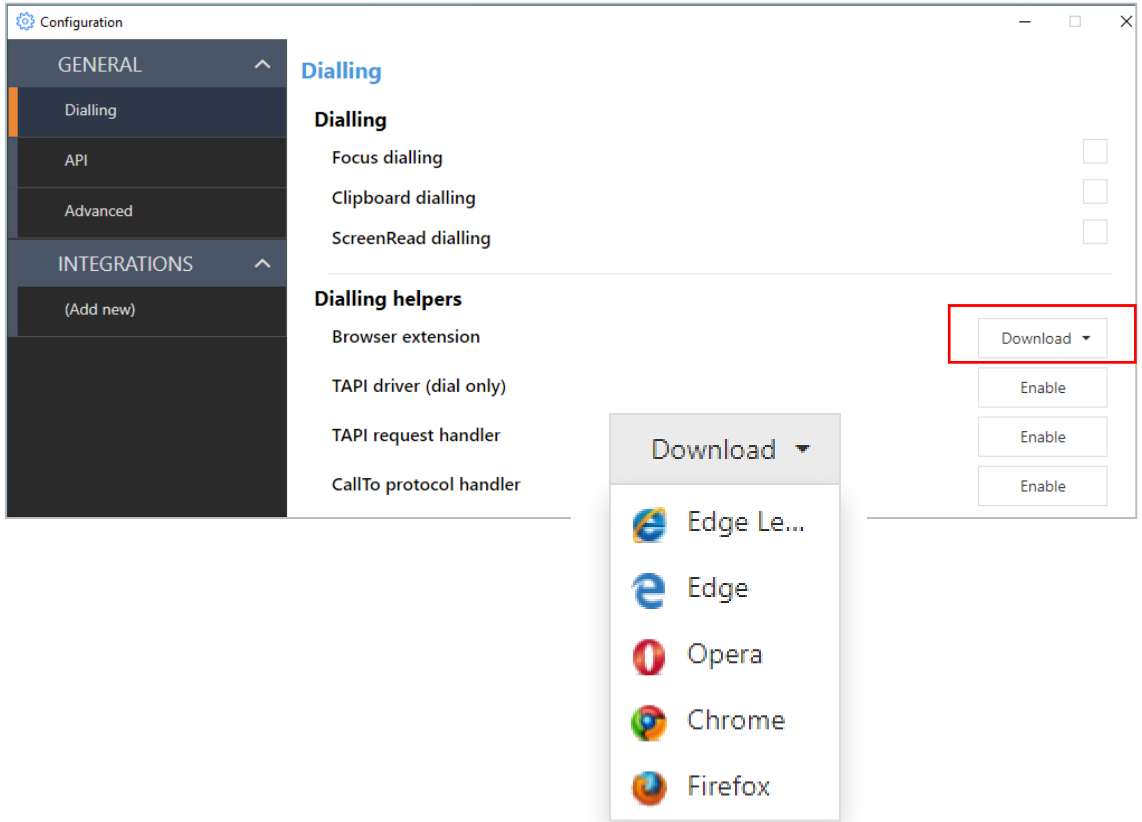
Dialing Helpers

The Dialing helpers configuration page is used to configure the following dialing techniques:

- Web-Page dialing
- TAPI driver
- TAPI request module
- CallTo protocol handler



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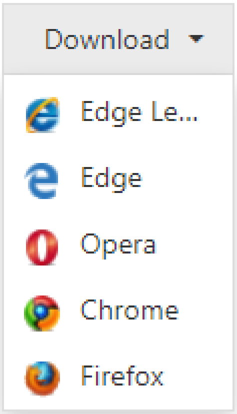
Web page dialing

Configure Web page dialing for:

- Microsoft Edge
- Google Chrome
- Mozilla Firefox
- Opera



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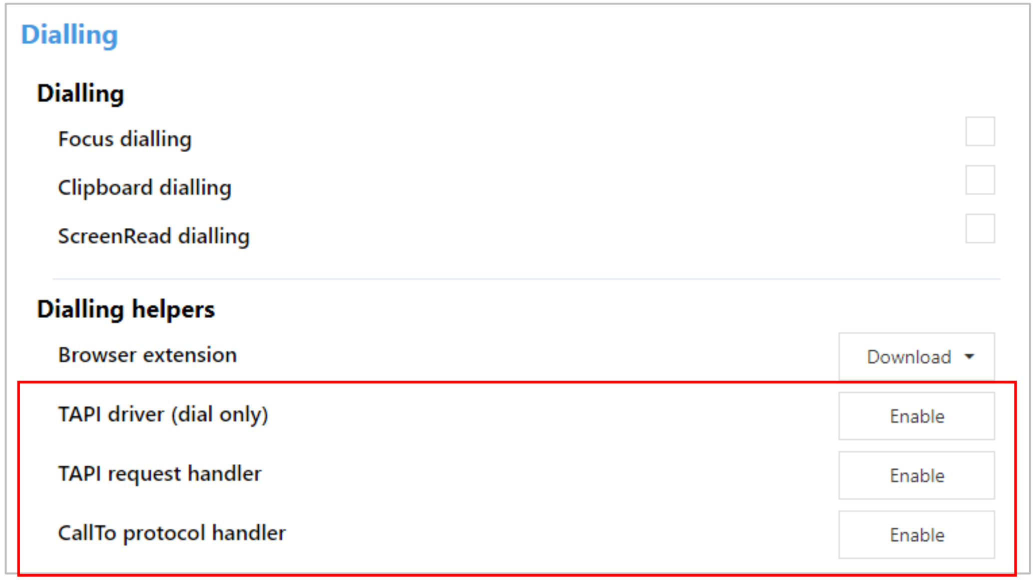
Other Dialing Techniques

- **TAPI driver**. Enables dialing from applications that are programmed to support dialing through a TAPI driver
- **TAPI request handler**. Enable CRM Integration to handle TAPI dial commands issued directly from the TAPI compliant application (not via a driver)
- **CallTo protocol handler**. CallTo is a popular protocol used by developers to mark-up telephone numbers within their application. Any numbers, when marked up in this way and clicked, will cause CRM Integration to dial the number



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Licensing

Licensing

- There are a number of mechanisms to license the product but each option relies on the Partner Desktop Client passing a unique user ID to the API.
- **partnerCRM** will then use the user ID to check if the user is licensed
- The license can be assigned in Mondago's own licensing database or the partner can assign the license on their own platform
- Licenses are charged on a per user, per month basis
- For clarity, user entered "Serial number" licensing options available with earlier (V3) versions are not available with **partnerCRM**.

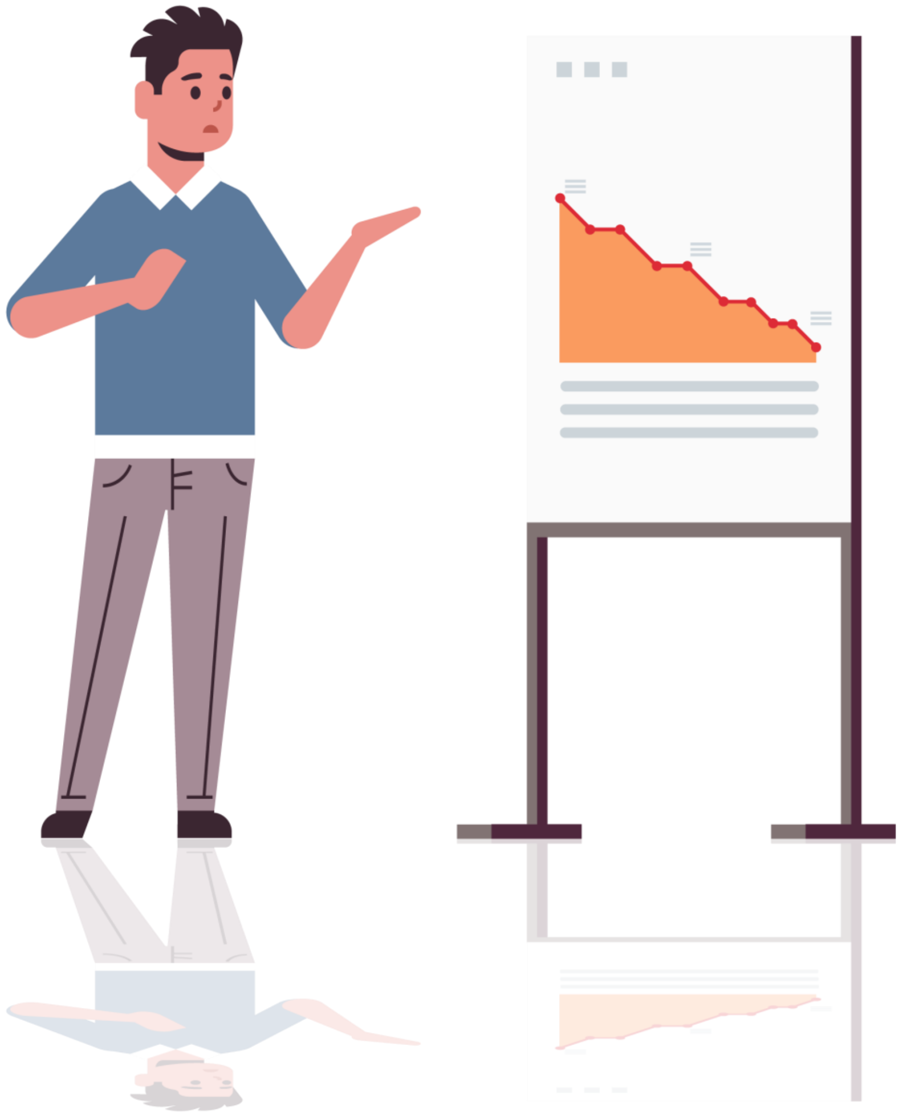
Integration Classification and Management

Integration Classification and Information

- Two types of integration classification: “Standard” and “Controlled”
- "Controlled" not normally visible and only available on agreement

"Standard" Integration

- Support for Caller Preview, Add contact , Screen popping, address book searching, and click to dial as standard
- Can be easily installed and configured directly by the customer or reseller
- Integrated on-line help for integration add-in setup guidance.



“Controlled” Integration

- Integration add-in has been written to meet a specific customer request.
- Not normally visible in the application
- Requires a special code to make visible
- A chargeable project request must be made on Mondago to enable and install integration. (send order to orders@mondago.com)
- Integration features may vary by application and support for future versions might not be available.
- Details are documented on product web-site

Other applications can be investigated on request via the online Application Integration Request Process (AIRP).

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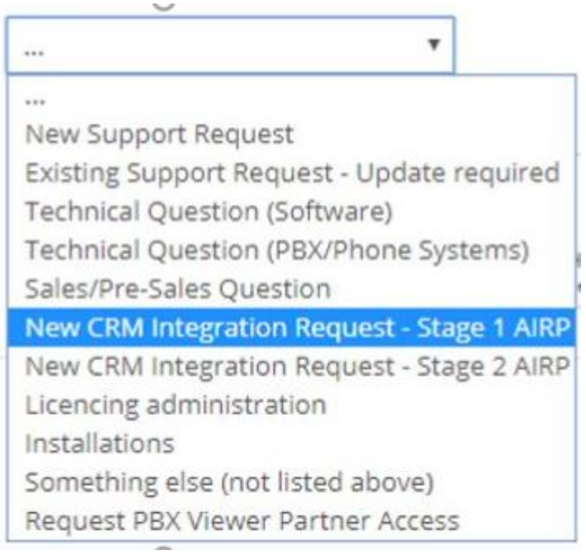
Special note

- If you are familiar with Mondago’s own desktop UC and CRM integration clients then please note that CRM integrations of the Type “Client Add-in with Events” or Classification “Standard-Select” are NOT available with **partnerCRM**.

Application Integration Request Process (AIRP)

- **partnerCRM** supports requests for new integrations:
  - From https://integrations.pc.mondago.com/ search for integration required
  - When not found a link will be presented to request a new integration
  - Raise a new ticket
  - Then go to – How can we help today -> New CRM Integration Request – Stage 1 AIRP
  - Then answer the open question
  - We send a price proposal (5 workdays)
  - Start working on the integration when we received an order at orders@mondago.com

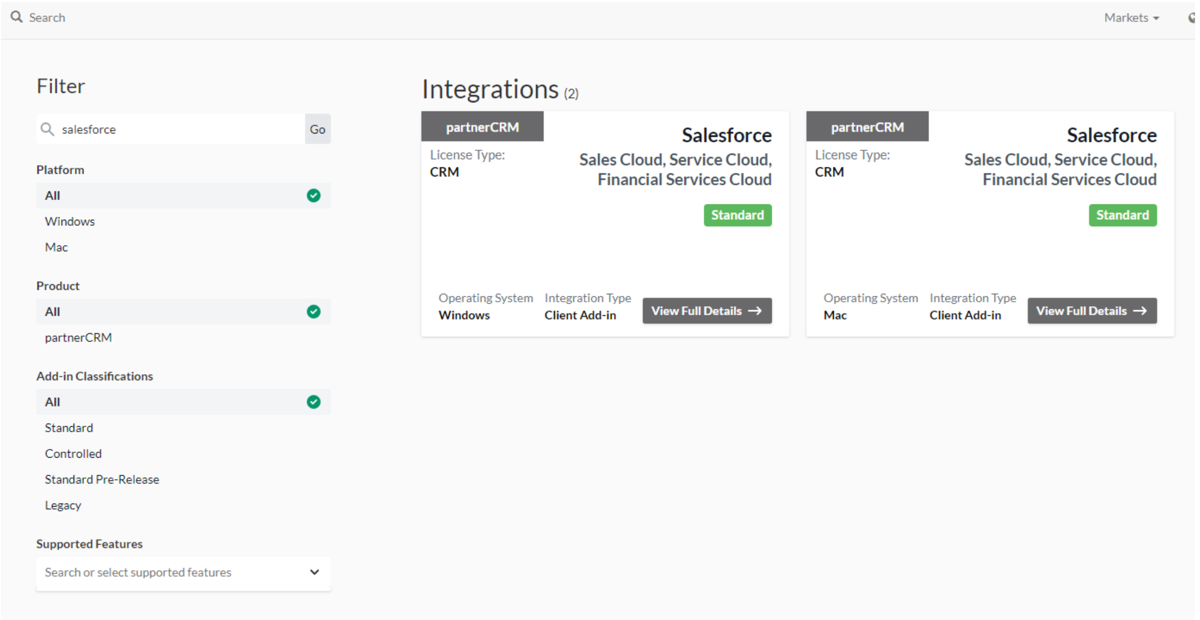


Other applications can be investigated on request via the online Application Integration Request Process (AIRP).

CRM Viewer

- Mondago provide a CRM Viewer web-site detailing supported integrations
- A branded version can be provided matched to the integrations currently supplied in the partners implementation

https://integrations.pc.mondago.com/



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RELEASE MANAGEMENT and NEW RELEASES

Release Management

- Updated add-in libraries are provided regularly to keep pace with market changes.
- The deployment of a new libraries is applied via a new version of **partnerCRM** installation file. The upgrade is designed not to affect any existing configured CRMs.
- When a new library is released, Mondago will communicate with Partners and make the new build available for download from your Microsite as a Release Candidate (RC).
- Once a RC is made available, the Partner is responsible for integration testing and managing the availability of the integration add-in library in the field.
- Release notes are available for each released version of the CRM add-in library.
- Significant development is always ongoing in the field of security, access methods and API enhancements. Not all of these are in our control. However, we endeavour to keep pace with these changes to ensure minimal disruption.

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THANK YOU