ConnectLeader

ConnectLeader™ for MS Dynamics

User Guide

This document contains important information for all Microsoft Dynamics CRM-ConnectLeader users. Please ensure that it is distributed among all applicable parties.

Disclaimer

The information in this document is subject to change without notice due to continuous improvements / enhancements to the product; therefore, it should be used as guide only. In addition, Sales Rep / Sales Manager / Prospects names used in this document are fictitious.

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Introduction

ConnectLeader™ is a cloud-based power dialing software, which assists Sales Representatives, Recruiters, Marketing and other business professionals who rely on outbound calling to prospect and connect with more decision makers in less time.

ConnectLeader™ for Microsoft Dynamics is a turnkey integration between ConnectLeader and Microsoft Dynamics CRM, which allows users to dial their contacts/leads in the CRM. The following ConnectLeader™ dialing products are available in Microsoft Dynamics.

- Personal Dialer
- Team Dialer
- Click Dialer
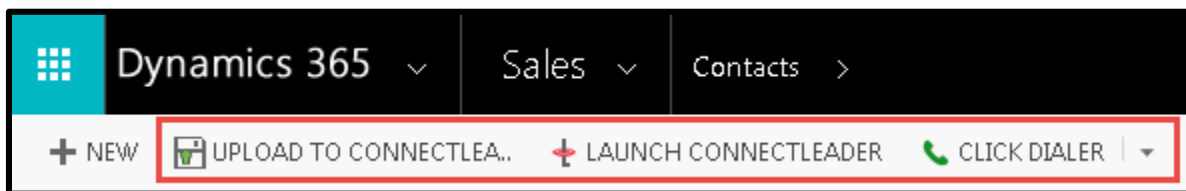
You can upload a contact or lead view from Microsoft Dynamics to the ConnectLeader portal to dial through Team Dialer/Personal Dialer.

Using the Click Dialer menu, you can either dial the available contacts/leads separately in a single click or select contacts/leads and dial the list.

Call results chosen when dialing Team Dialer and Personal Dialer from ConnectLeader™ will be updated automatically in Microsoft Dynamics.

ConnectLeader Products

Team Dialer

Team Dialer is a cloud-based power dialing software with Live Conversation Automation (LCA) technology designed and developed for Dialing Agents, Sales Reps and Sales Managers. The Dialing Agents play the major role in connecting with prospects through the hierarchy of receptionists, gatekeepers, IVRs, etc. Once the call is connected to the prospect, the Dialing Agent will immediately transfer the call to the Sales Rep.

Refer to the **Team Dialer – Sales Rep Guide** for detailed information of the product and the user's workflow.

Personal Dialer

Personal Dialer is a cloud-based power dialing software designed for Sales Reps, Account Managers, Marketing Managers, and Small Business Owners to reduce or eliminate manual dialing, which helps sales organizations to improve sales productivity. The Sales Rep (Talker) plays a major role in connecting with prospects through the hierarchy of receptionist, gatekeeper, IVR, etc.

Refer to the **Personal Dialer – Sales Rep Guide** for detailed information of the product and the user's workflow.

Click Dialer

Click Dialer™ is a click-to-call dialing software that works within the Microsoft Dynamics user interface.

Click Dialer increases sales productivity by allowing users to call a contact/lead:

- By clicking on the green phone handset icon 📞 of each contact/lead
- By selecting contacts/leads and clicking dial the list

Refer to the **Click Dialer – User Guide** for detailed information of the product.

About this Guide

The purpose of this guide is to familiarize you on how the integration between Microsoft Dynamics and ConnectLeader™ work with the ConnectLeader™ Dialers (**Team Dialer/Personal Dialer/Click Dialer).**

The instructions in the guide are based on the assumption that the admin has already enabled the ConnectLeader Dialers in Microsoft Dynamics.

ConnectLeader™ for Microsoft Dynamics

After successfully logging into Microsoft Dynamics, depending on the products purchased, you will see the following ConnectLeader buttons in the **Contacts** & **Leads** pages of your Microsoft Dynamics CRM.
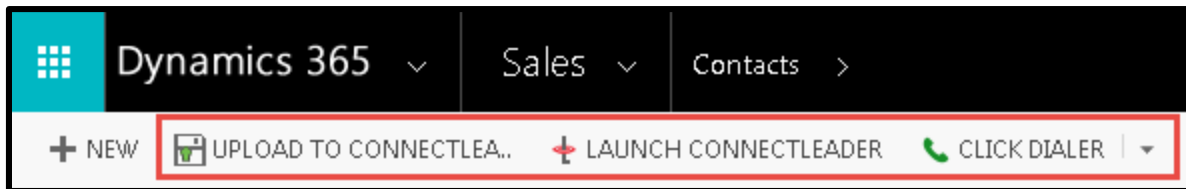
UPLOAD TO CONNECTLEADER – Click to upload the selected view to the ConnectLeader portal (Personal Dialer or Team Dialer) for dialing.

LAUNCH CONNECTLEADER – Click to launch the ConnectLeader portal and resume dialing from your previous session.

CLICK DIALER – Click to launch Click Dialer and click the green phone handset icon of each contact/lead to place a call.

How to upload a view to ConnectLeader

Find the steps below to upload a view from Microsoft Dynamics to the ConnectLeader™ portal, for dialing:

1. After successfully logging into Microsoft Dynamics, either:

   Contacts

   - click **Sales ► Customers ► Contacts** to upload the contacts from the Contacts page
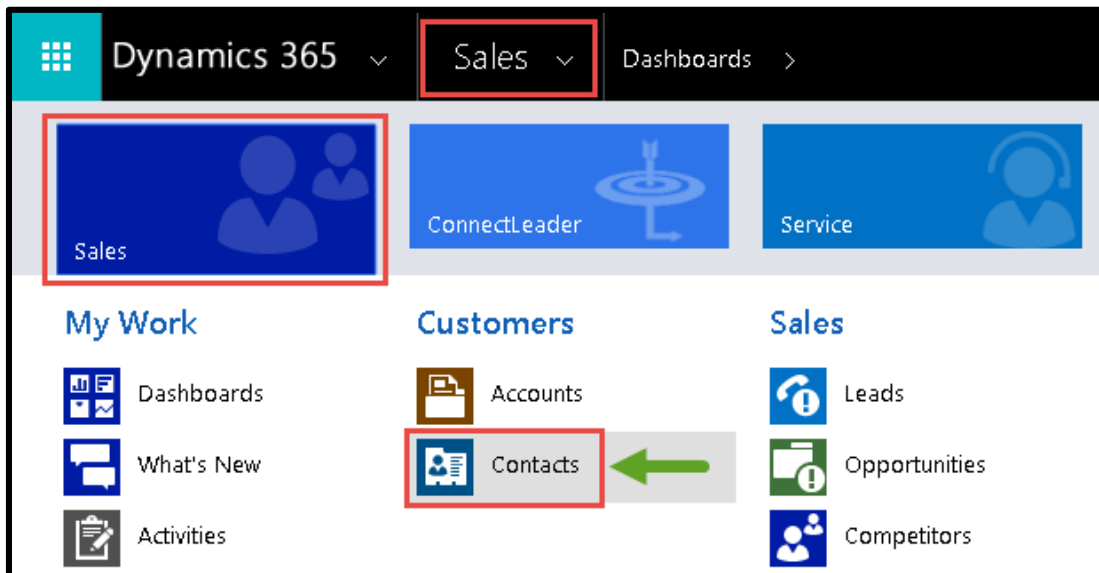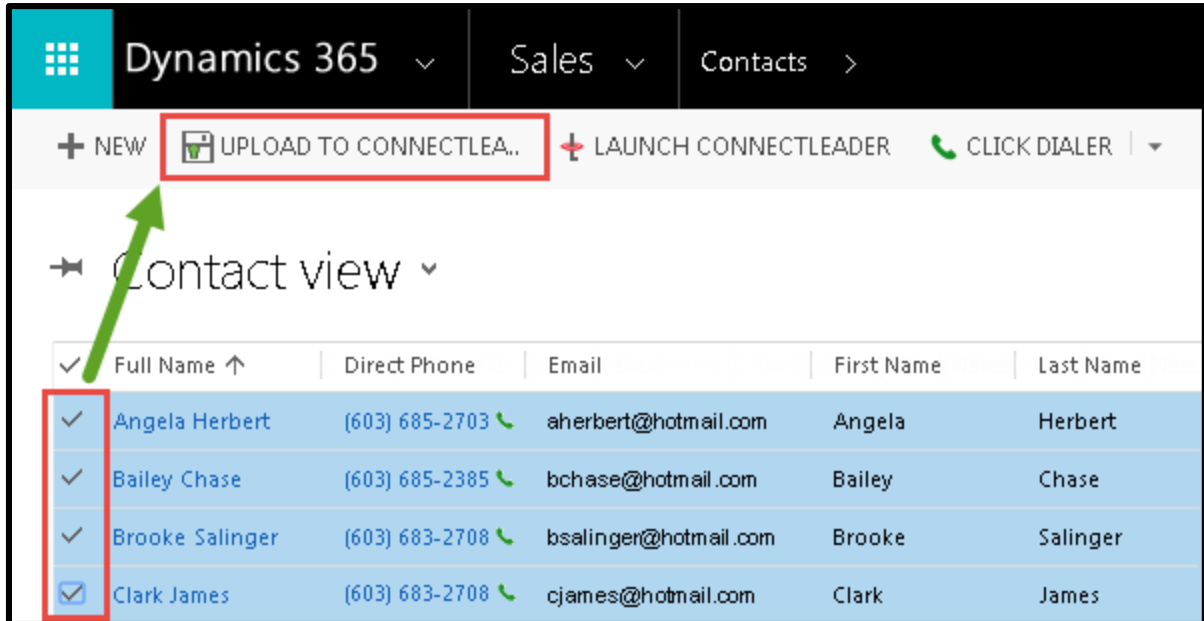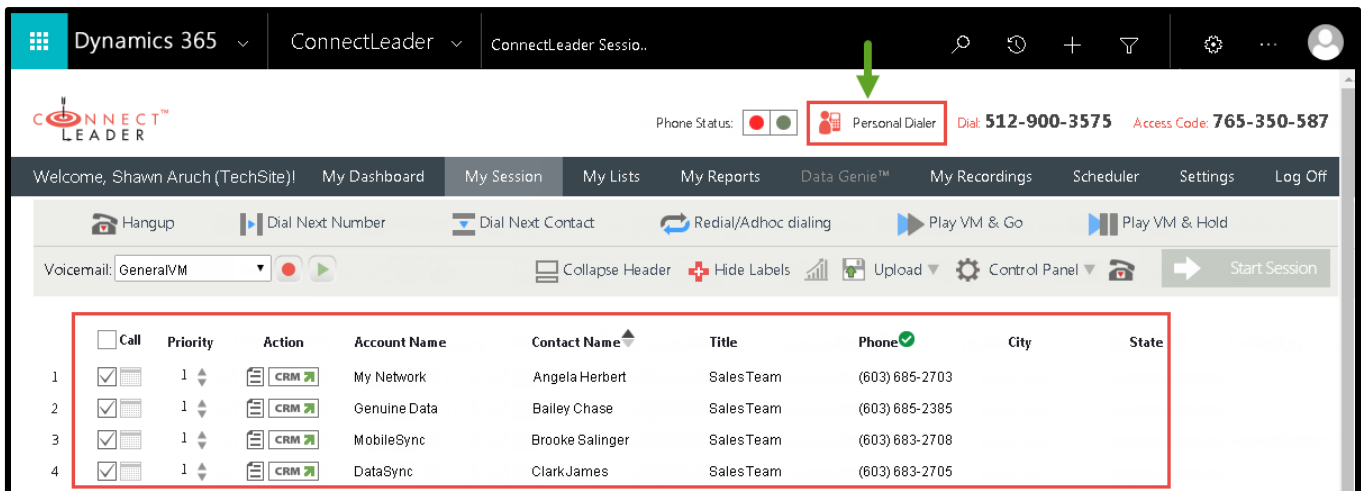

   Leads

   - click **Sales ► Sales ► Leads** to upload the contacts from the Leads page
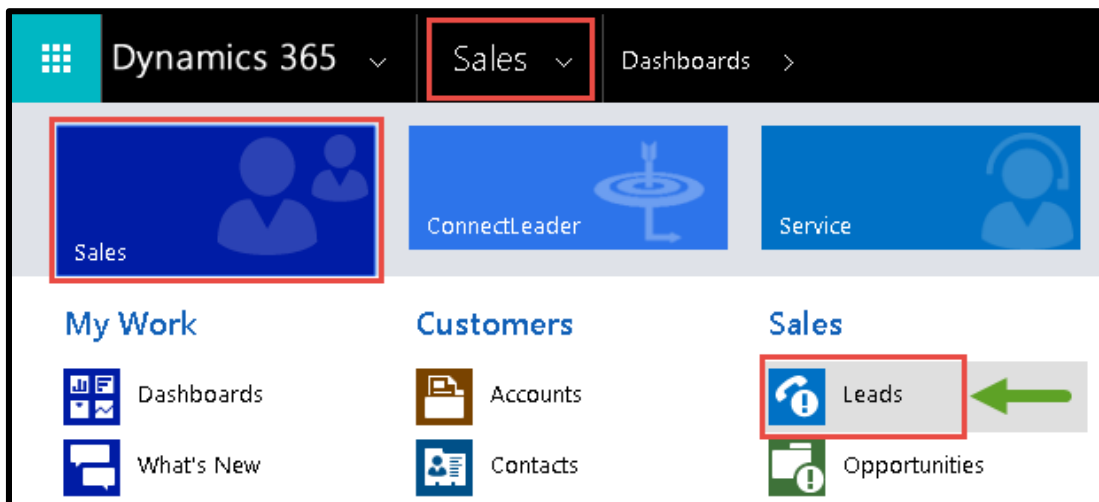
2. Select the required contacts from the view and click 💾 **UPLOAD TO CONNECTLEADER** to upload the contacts.

3. The **ConnectLeader™** portal will be launched within the CRM.

IMPORTANT NOTE
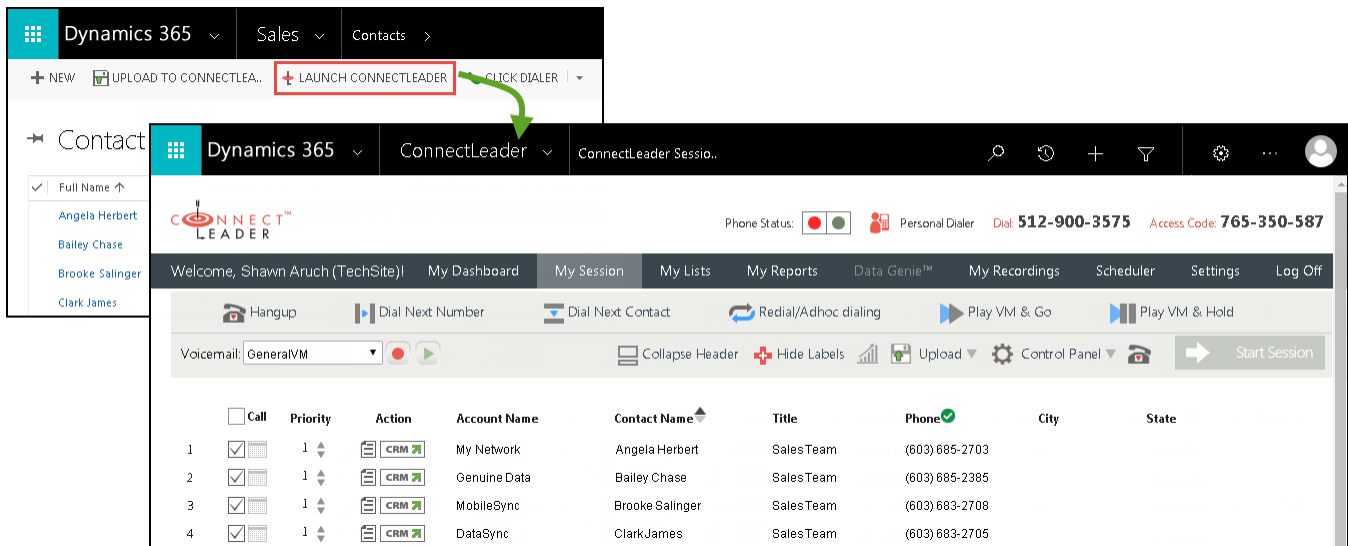
Ensure that the contacts/leads are selected before clicking the **UPLOAD TO CONNECTLEADER** button. If you do not, the application will display a pop-up as shown below:
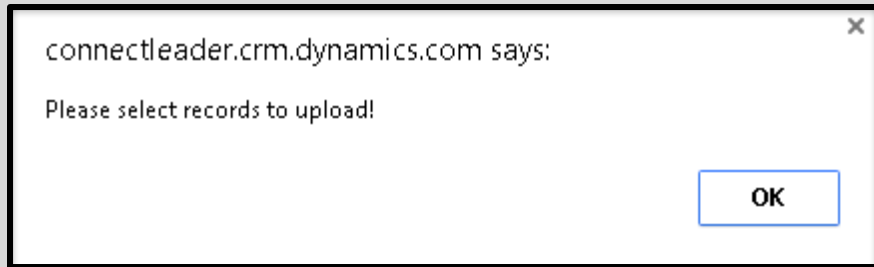
4. Initiate the dialing session as instructed in the **Team Dialer/Personal Dialer** - **User Guide**.

How to launch ConnectLeader from Microsoft Dynamics

1. Within the Contacts/Leads page, click **LAUNCH CONNECTLEADER** to launch the ConnectLeader portal and resume dialing from your previous session.

Click Dialer

Click Dialer™ is a click-to-call dialing software that works within the Microsoft Dynamics user interface.
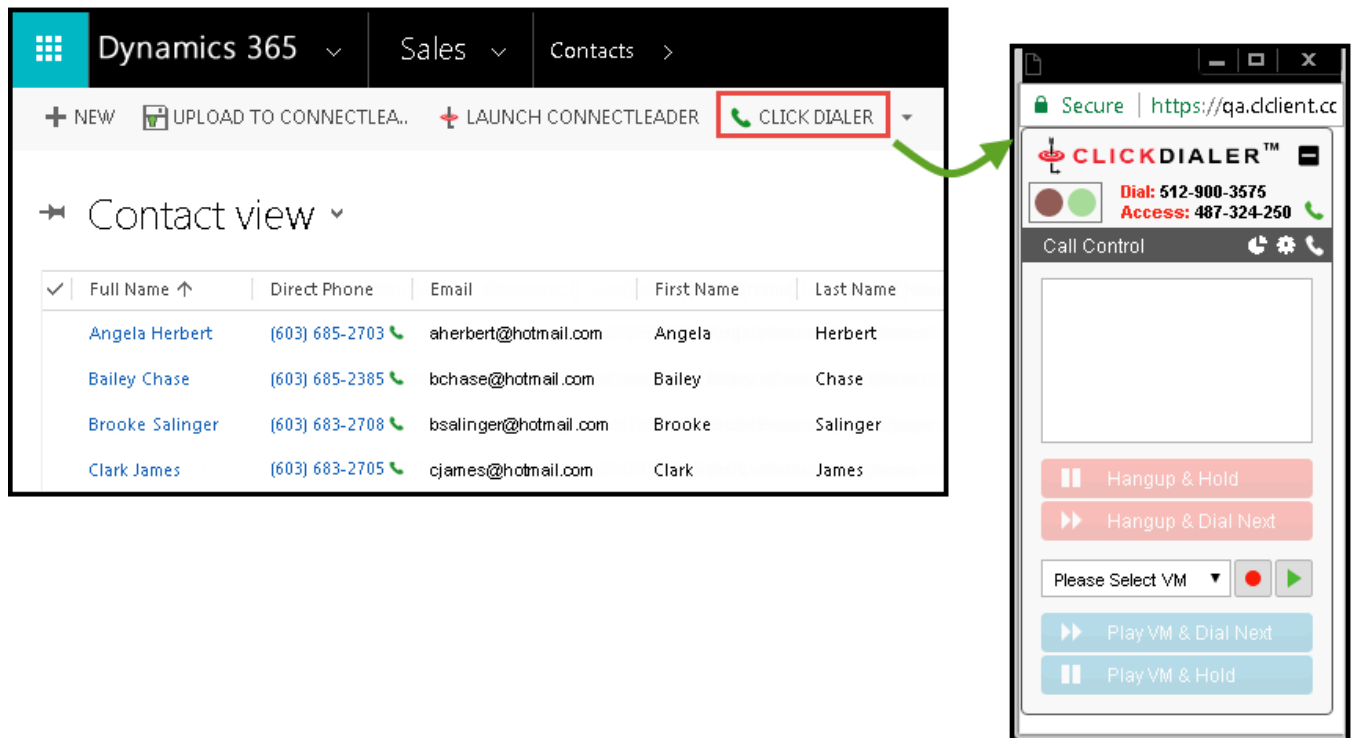
Click Dialer increases sales productivity by allowing users the ability to call a contact by clicking on the green phone handset 📞 icon.

<u>IMPORTANT NOTE</u>

Use a phone with a reliable connection when dialing into the Click Dialer conference bridge. A landline phone is preferred.

Using **Click Dialer**, you can dial each contact/lead individually or dial the selected list. Find the steps below to dial from Microsoft Dynamics CRM:

1. Within the Contacts/Leads page, click 📞 **CLICK DIALER** to launch the Click Dialer portal.

2. Dial the number, followed by the access code, which are visible on the portal, to dial into the conference bridge.
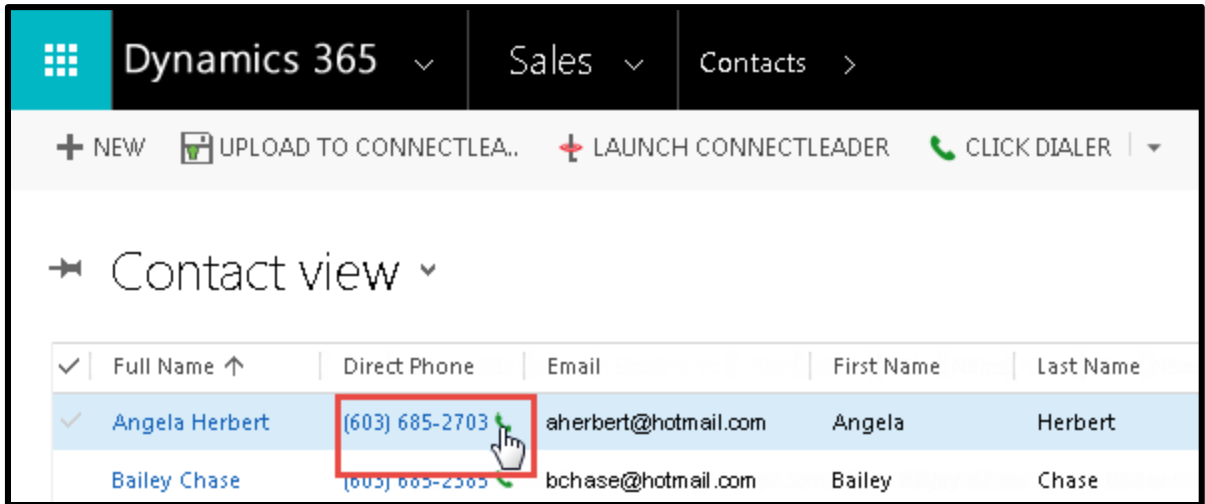

3. A white check mark on the green circle indicates that the connection is ready.
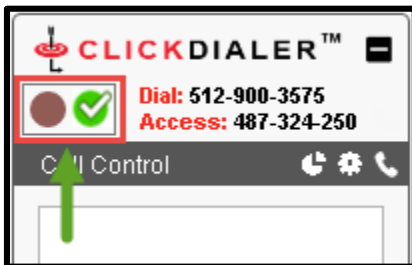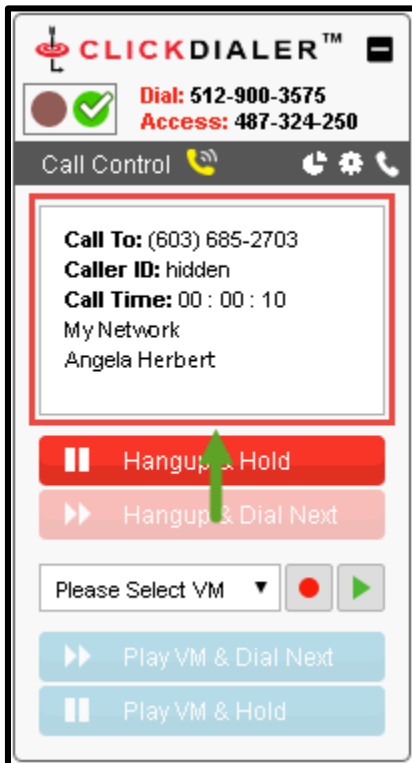
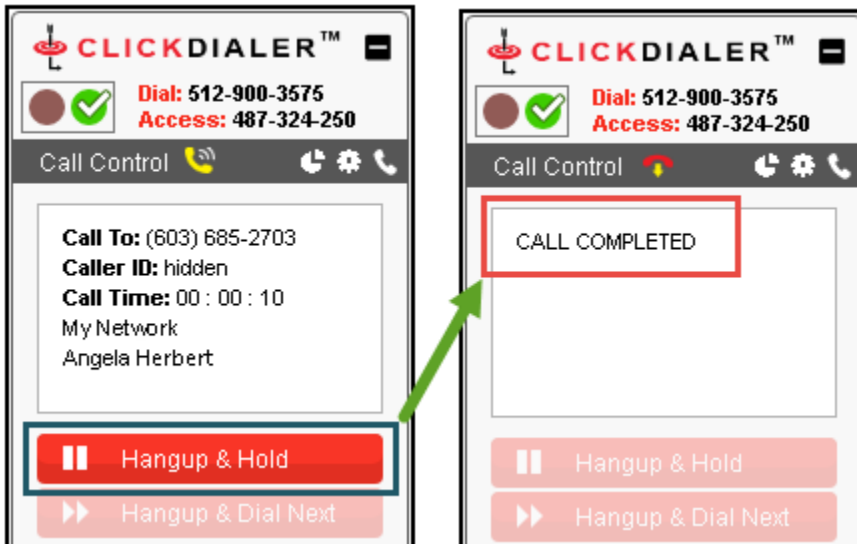4. Start dialing using one of the two ways, explained below:

Dial a Number

a. Click the phone 📞 icon to dial each contact/lead individually in a single click, as shown below:

b. Click Dialer places the call.

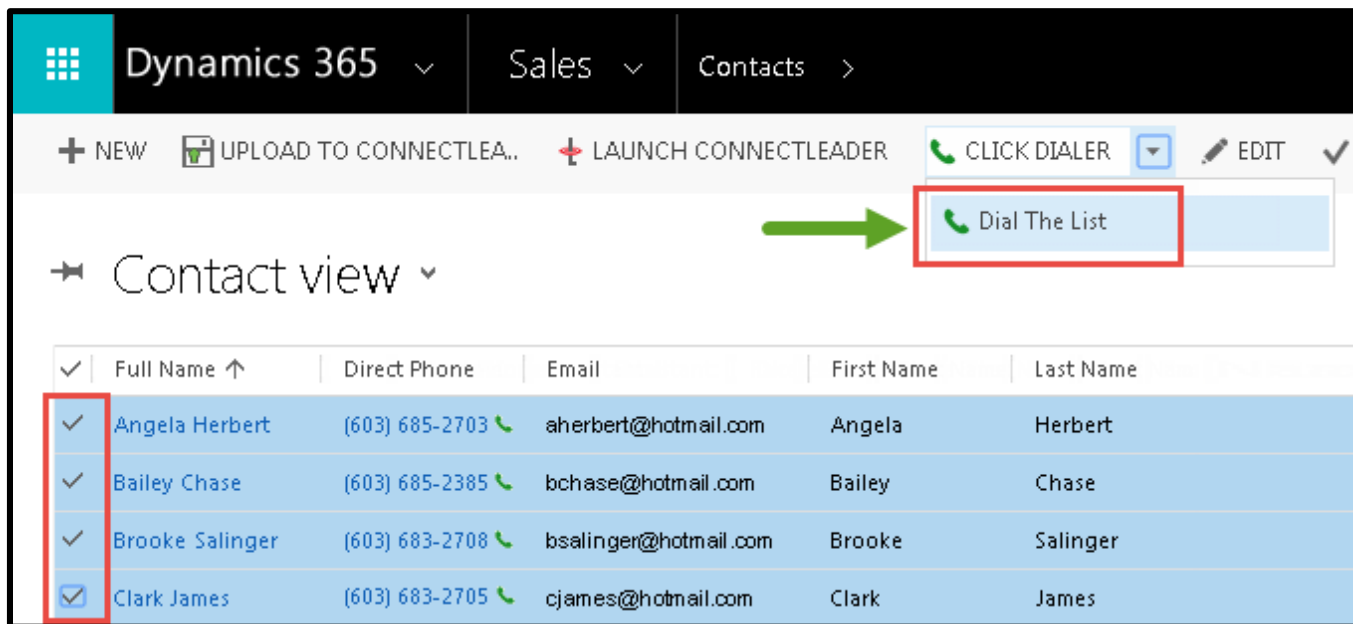c. When the call is completed, click **Hangup & Hold**

If the person does not answer, you can either:

- Leave a manual voicemail and click **Hangup & Hold**

- Or, if you have a pre-recorded voicemail you want to use, select it from the dropdown and click **Play VM and Hold**
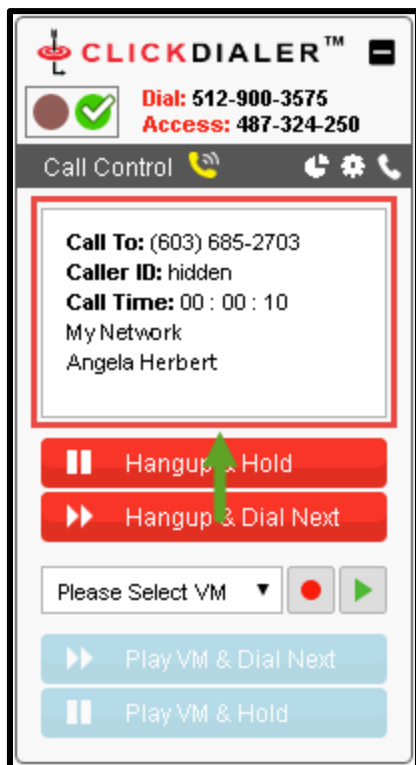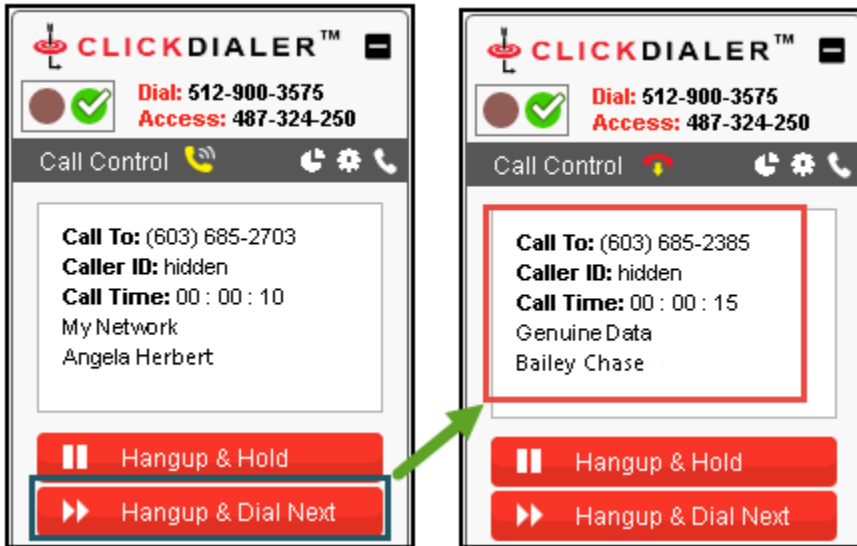
Dial the List

a. To dial multiple contacts, open Click Dialer by selecting Click Dialer, then select the required contacts from the Contacts/Leads page and click 📞 **CLICK DIALER ► 📞 Dial The List**.

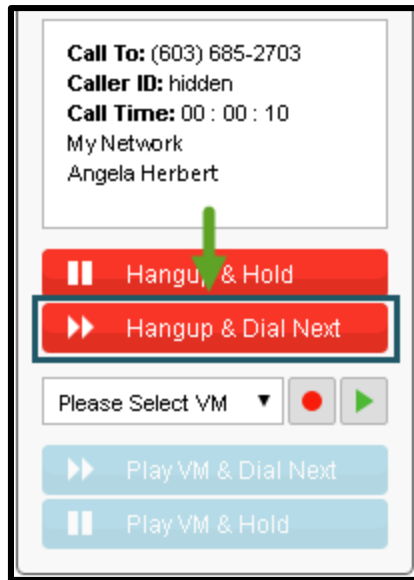b. Click Dialer places the call for the contacts selected.

c. When the call is completed, click **Hangup & Dial Next** to continue to the next number.

If the person does not answer, you can:

- Click **Hangup & Dial Next** to move to the next number

- Leave a manual voicemail and then click **Hangup & Dial Next**

- Or, if you have a pre-recorded voicemail you want to use, select it from the dropdown and click **Play VM and Dial Next**

IMPORTANT NOTE

Click Dialer has an option to show when a call is **in-progress** and when a prospect has **hung up**. The icons are available to the right of the **Call Control** label, as a quick reference of the call status.

Click Dialer - Adhoc Dial

You can make use of this feature, if you know the phone number of a Contact.

1. Dial the number, followed by the access code, which are visible on the portal, to dial into the conference bridge.

2. Click the **phone** icon 📞 to the right of the **Call Control** label to open the **Adhoc Dial** window.
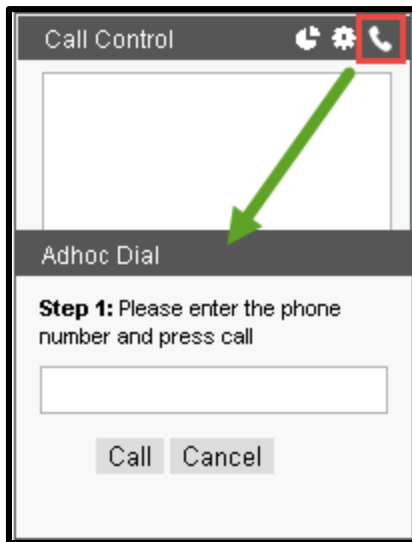
3. Enter the phone number of the Contact.

4. Click the **Call** button to dial the number entered.
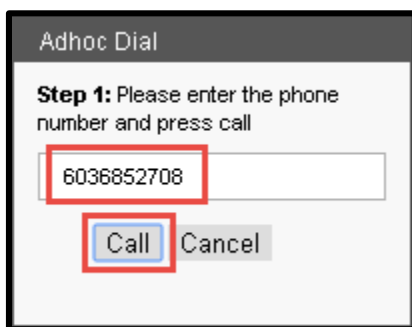
You will see the text '**Unknown Number**' in the **Call Control** pane, as shown below:

How to pre-record a Voicemail in Click Dialer?

You can pre-record an unlimited number of voicemails so you have a selection from which to choose.

1. Dial the number, followed by the access code, which are visible on the portal, to dial into the conference bridge.

2. Next to the **Please Select VM** dropdown, click the **Record** ● button.
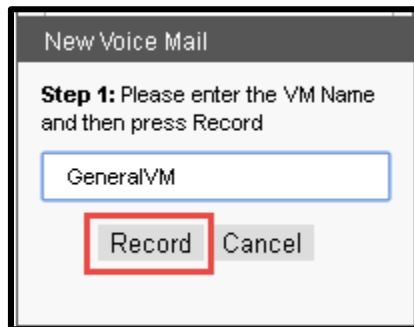

3. The **New Voice Mail** window will pop up. Type a unique, descriptive name so that it can be easily identified.
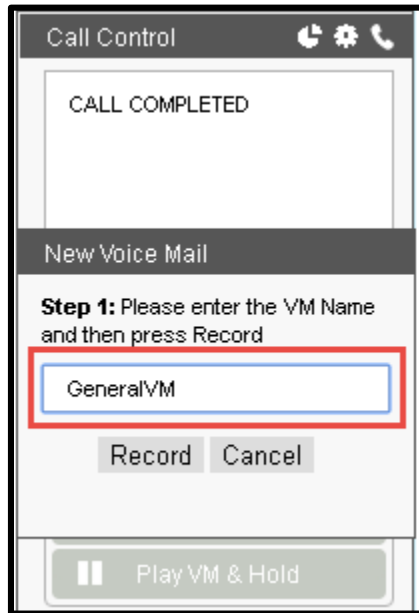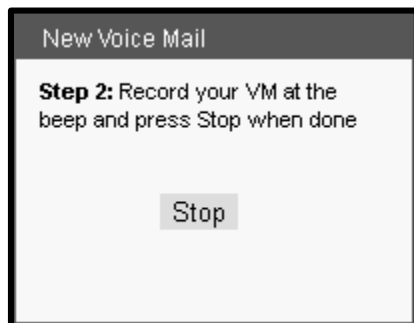
NOTE: Do not use spaces in the name, instead use an underscore.
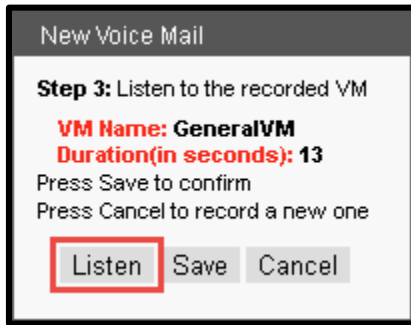
4. When you are ready to record the message, click **Record**.

5. Record your message at the beep and click **Stop** when you are done.

6. Click **Listen** to review the message.

7. If you are satisfied with the recorded VM, click **Save** to use it in future. Otherwise click **Cancel** to delete it.
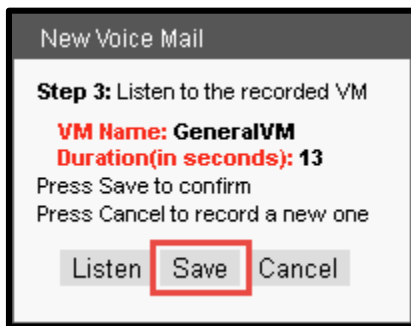
How to delete a pre-recorded Voicemail in Click Dialer?

1. Dial the number, followed by the access code, which are visible on the portal, to dial into the conference bridge.

2. Click the **gear** icon to the right of Call Control to open the **Settings** menu.
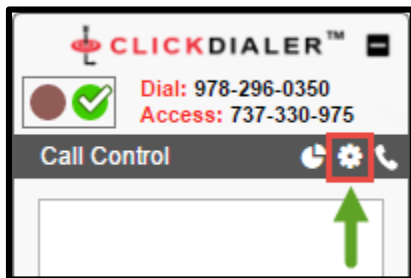
3. Use the **VM** drop-down to select the message you want to delete.
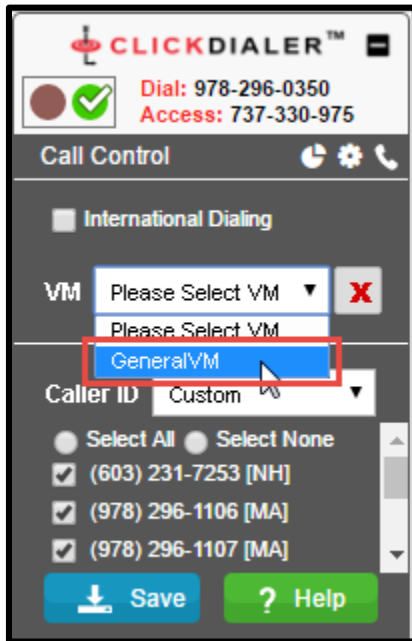
4. Click the **delete** button and a pop-up displays.

- Click **OK** to delete the VM, or

- Click **Cancel** to abort the delete process

5. Click **Save** to save the changes.

Click Dialer Settings

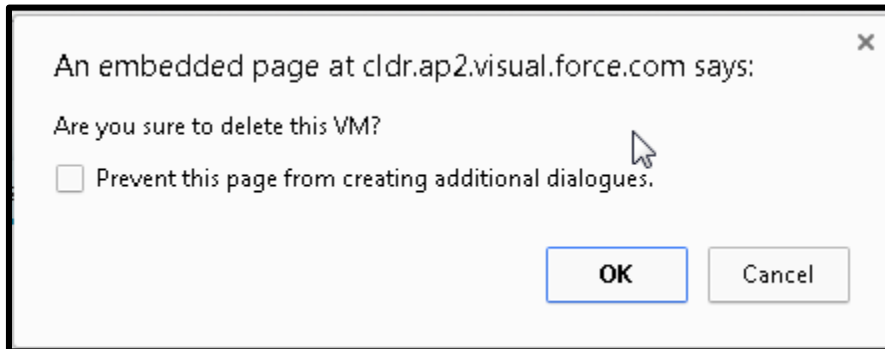1. Dial the number, followed by the access code, which are visible on the portal, to dial into the conference bridge.

2. Click the **gear** icon 🔧 to the right of Call Control to open the **Settings** menu.
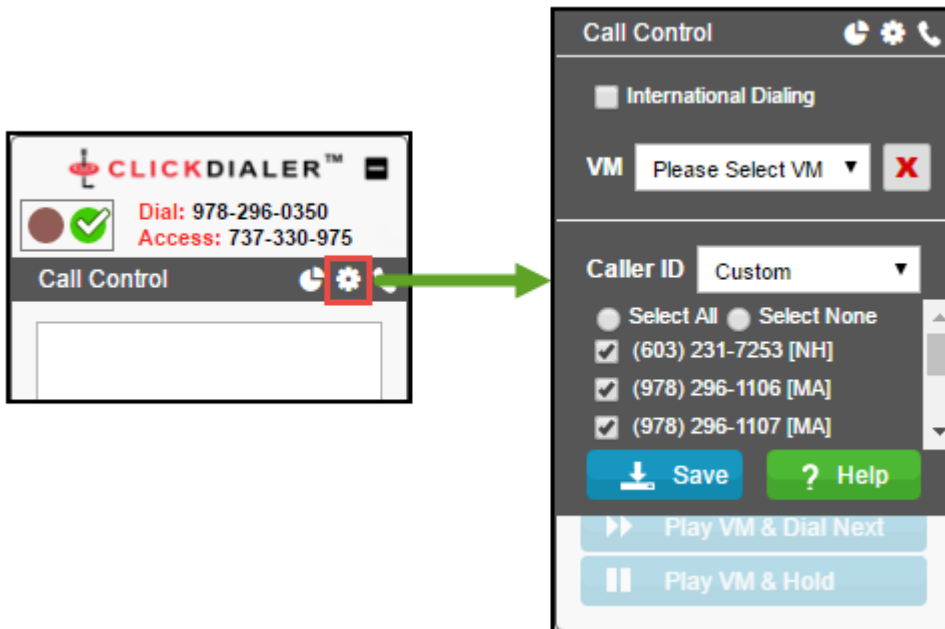
3. Adjust the settings as needed.

- **International Dialing** – Select/ Deselect the checkbox to enable/ disable international dialing. *(Not enabled for everyone and only needed if dialing outside the US and Canada)*

- **Set Caller ID** – Select the required **Caller ID** you want to use:
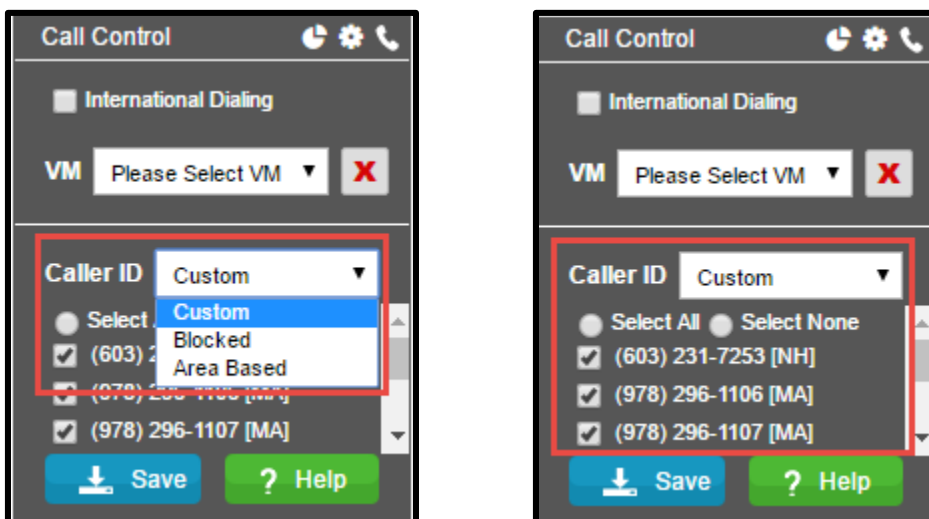
  o **Blocked** – The caller ID shows as BLOCKED

  o **Area Based** – Numbers based on the local area code you are calling

  o **Custom** – If you have Custom Caller IDs, you can select one or more. Please contact your Account Manager, if you wish to have your own Caller ID.

4. Click **Save**.

Click Dialer – Call Metrics

The Call Metrics are used to view the minutes accumulated for the time spent on dialing, speaking, and leaving voicemail. That means when you establish the connection to the Click Dialer Conference Bridge you can leave it up active and only accumulate dial time minutes for the time spent actively calling.

IMPORTANT NOTE

The connection may time out, if the session is inactive for a period of time.
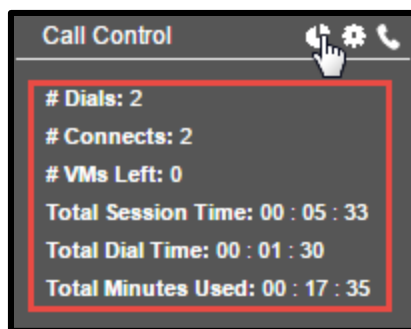
1. Dial the number, followed by the access code, which are visible on the portal, to dial into the conference bridge.

2. Click the **pie** icon to open the **Metrics** menu.

3. Review the metrics for the calls during this session, including:

# Dials	The number of dials you made during your current session.
# Connects	The number of calls logged during your current session.
# VMs Left	The number of voicemails left during your current session.
Total Session Time	The total length of time the conference bridge has been active.

Total Dial Time   The total dialing minutes used during your current session, indicating the amount of time calls were active including dialing, speaking, and leaving voicemails.

Total Minutes Used   The overall number of minutes you have used during your current license term.

4. Click the **Metrics** icon to close the menu.