

Overview

SimplicityLink is a Computer Telephony Integration (CTI) product that allows a standard level of integration with a wide range of popular CRM systems designed to help you get the most out of your Simplicity hosted business telephone system. SimplicityLink allows end users to work more collaboratively and collectively, getting information about callers quickly and efficiently. SimplicityLink is not only cost effective but is also easy to install and maintain.

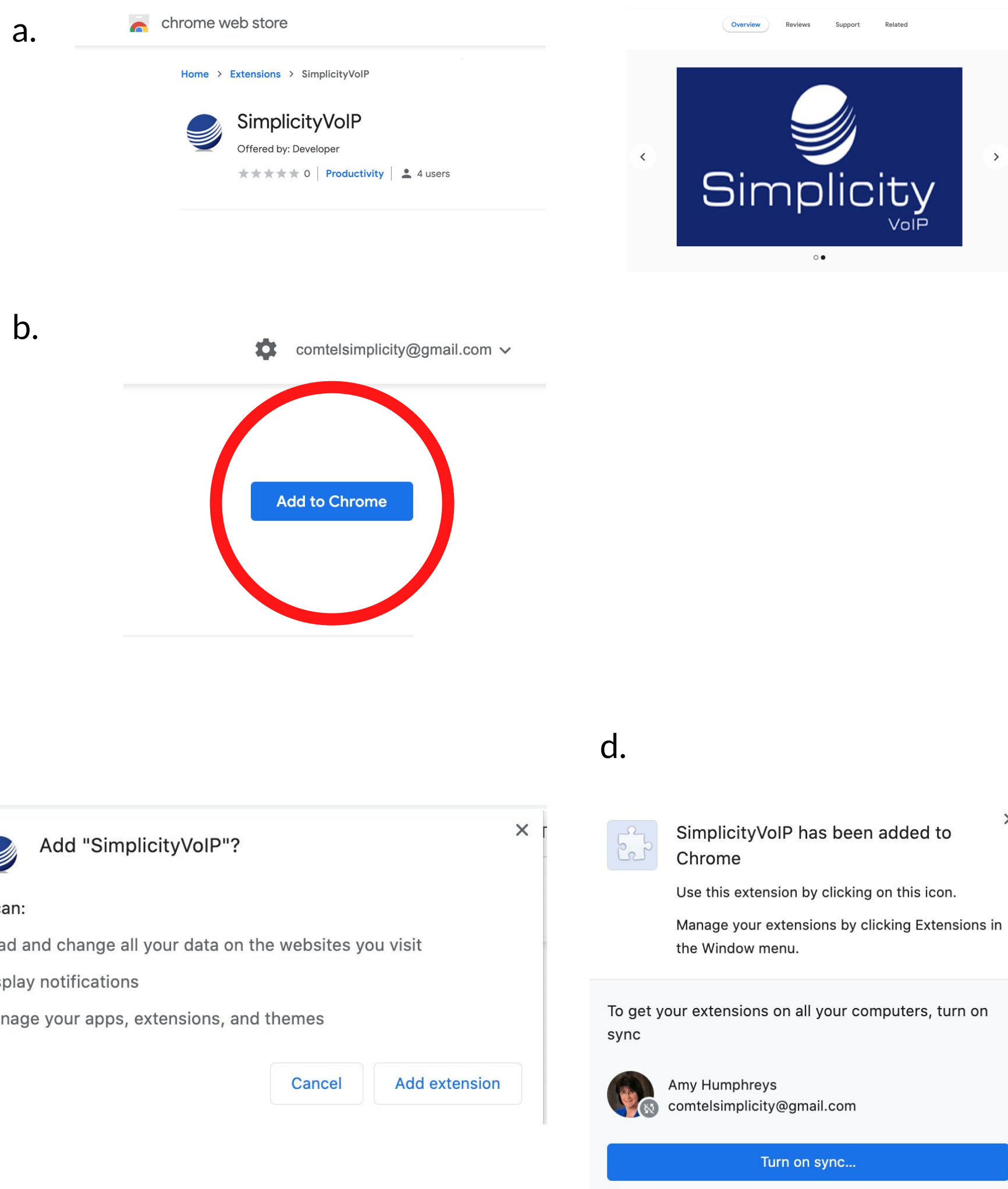
Getting Started

a. Go to Chrome webstore -
<https://chrome.google.com/webstore/category/extensions>

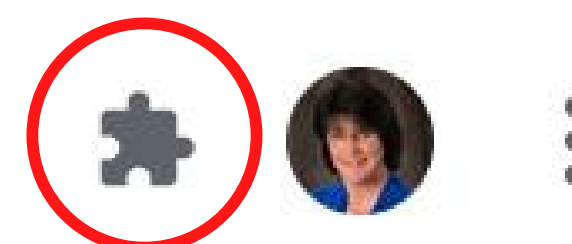
b. Search for SimplicityVoIP and
select Add to Chrome

c. Select Add extension

d. Once the extension has been
added, you will have the
opportunity to enable syncing

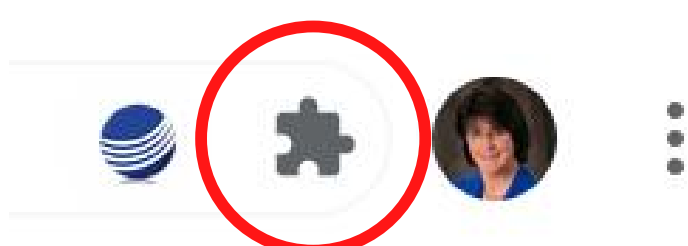


For easier access, select the puzzle piece icon in the upper right corner
of your screen (by your profile photo)



Select Simplicity VoIP extension by clicking the thumbtack icon 

Click Simplicity logo



Enter your client portal log-in, password and click arrow to complete log-in

a. Once logged in, you will view the call history screen with your recent activity.

b. This screen can be minimized by selecting the arrow on the upper right corner. Note: this will not log you out of the extension.

c. To return to the full recent call history screen view, click the Simplicity logo at the top of the page.

c.



Extensions

No access needed

These extensions don't need to see and change information on this site.



SimplicityVoIP



Manage Extensions



SimplicityVoIP

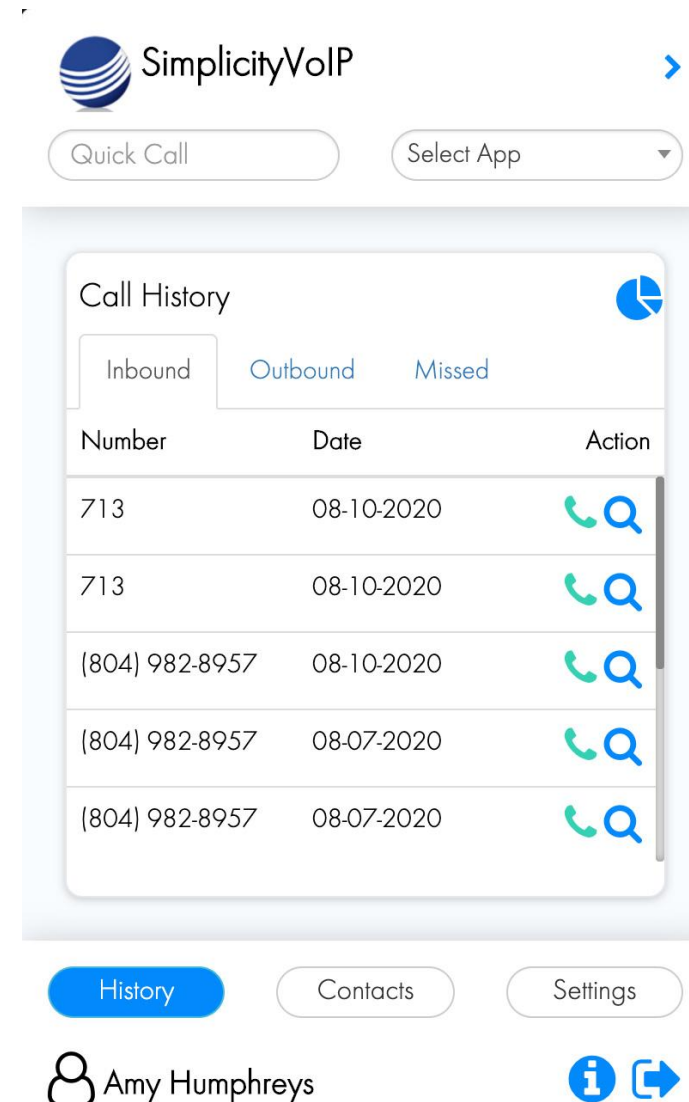


717@simplicity

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a.



b.

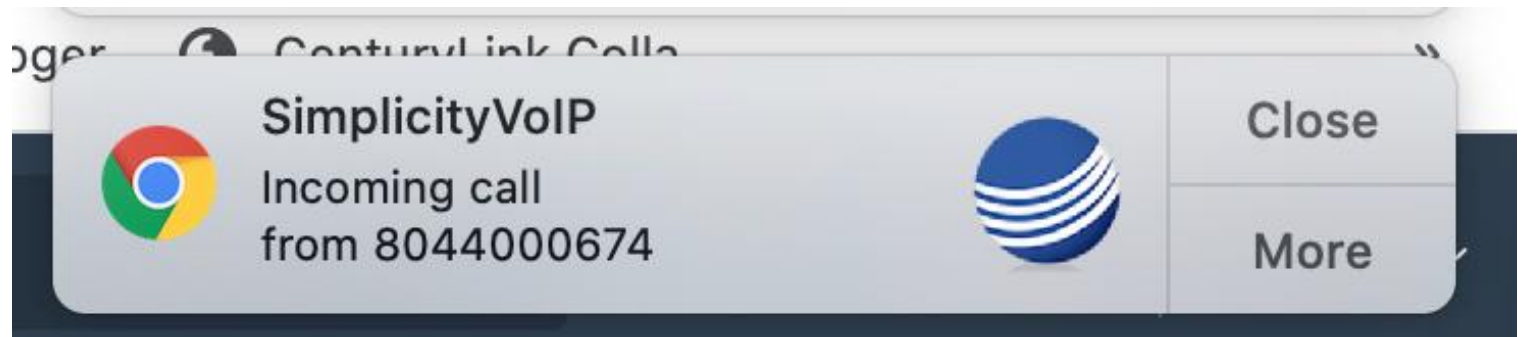


SimplicityVoIP



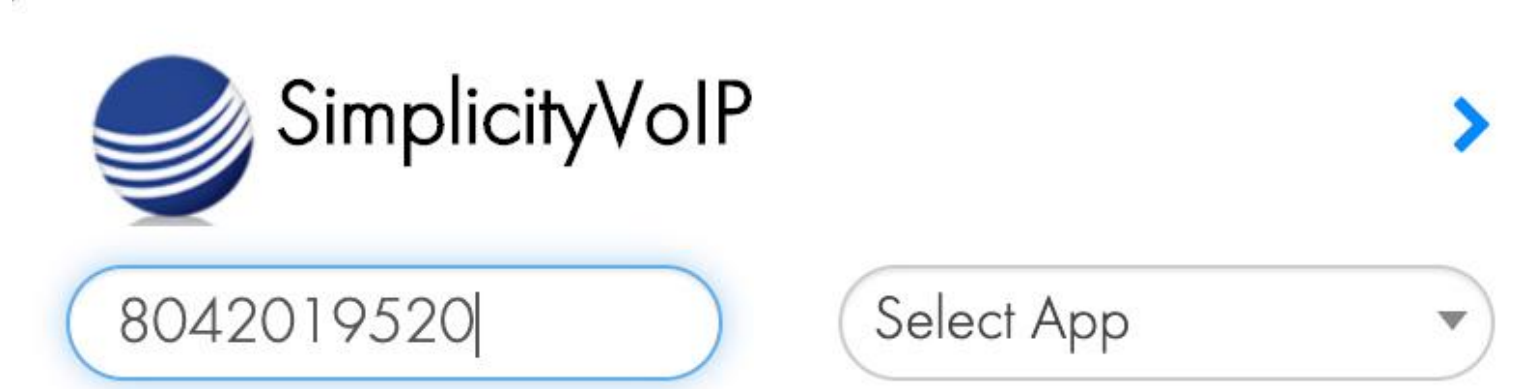
Incoming Call Notifications

Once the extension is downloaded, any incoming call will produce a call notification.



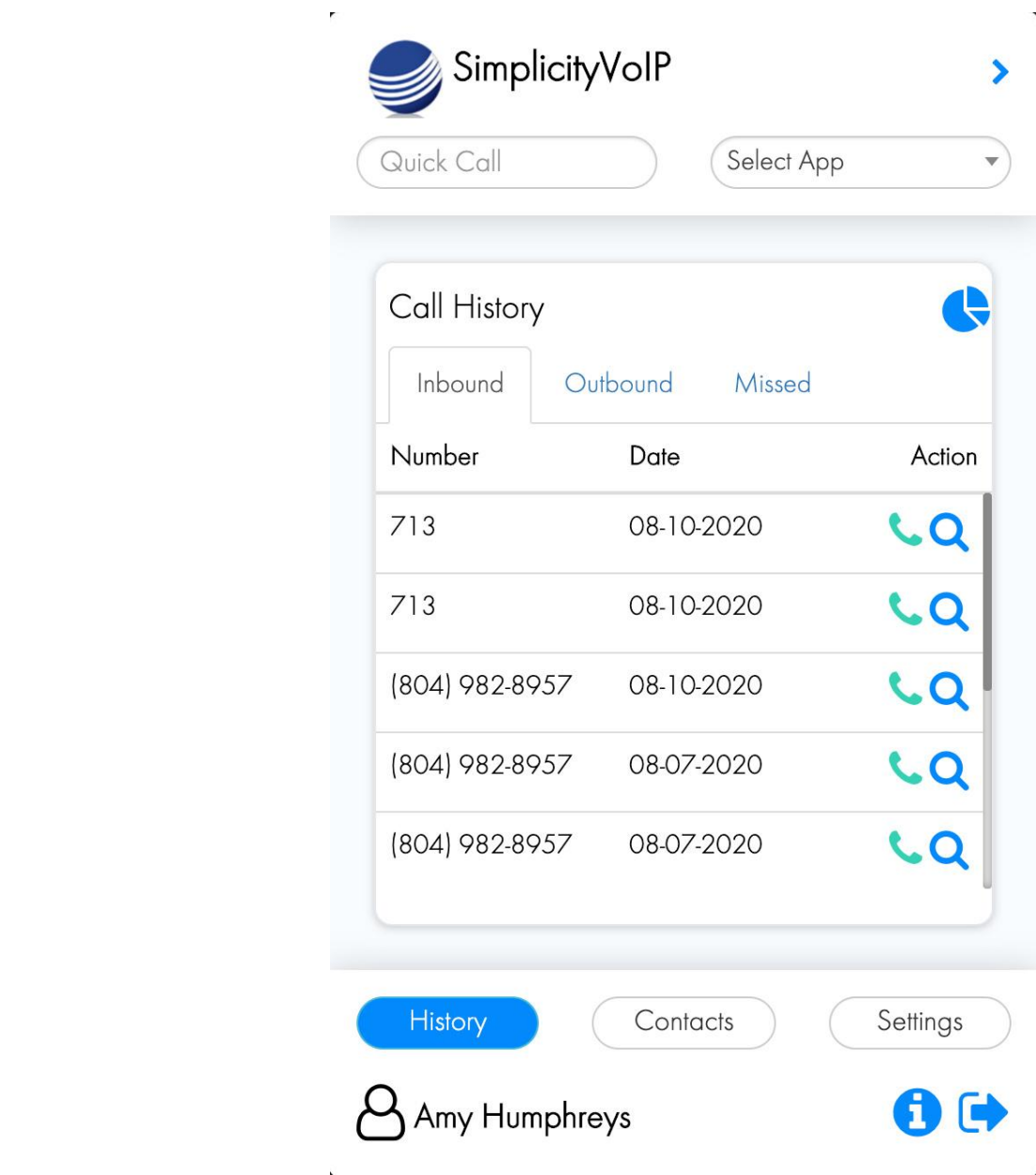
Dialing from Quick Call

From this screen, you can make a call by inputting a 10-digit number in the Quick call bubble, and hitting Enter. The phone associated with your extension will ring to initiate the call. Pick up that phone for the call to be completed.

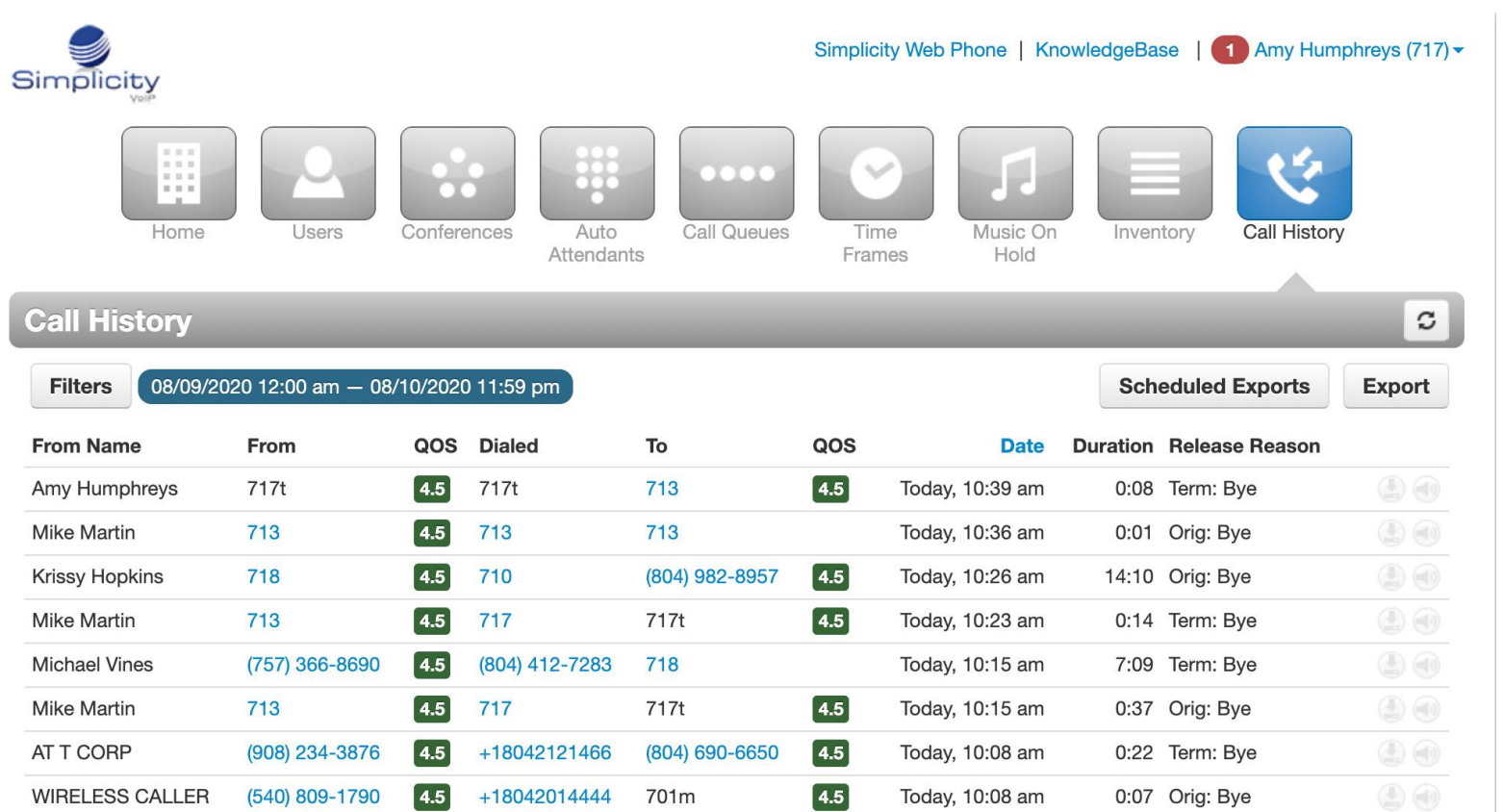


Call History

In the Call History portion of the screen, you can view inbound, outbound and missed calls by selecting the designated tab.



To view your complete Call History log, click the Pie graph  . You will be taken to the Simplicity client portal. Select the Call History tab, for call history details



Dialing from Call History

To call a number listed in your call history back, select the phone icon by the call. 

By selecting the Screen pop icon  by any of your calls, you will be able to access contact information through your CRM integration app. Simplicity will only set permissions to access clients' specific CRM apps.

At the bottom of the recent Call History screen, you can:

Access the Simplicity client portal by selecting the i icon 

Log out of the extension by selecting the side arrow icon 

 Amy Humphreys



Call History 		
Inbound	Outbound	Missed
Number	Date	Action
713	08-10-2020	 
713	08-10-2020	 
(804) 982-8957	08-10-2020	 
(804) 982-8957	08-07-2020	 
(804) 982-8957	08-07-2020	 



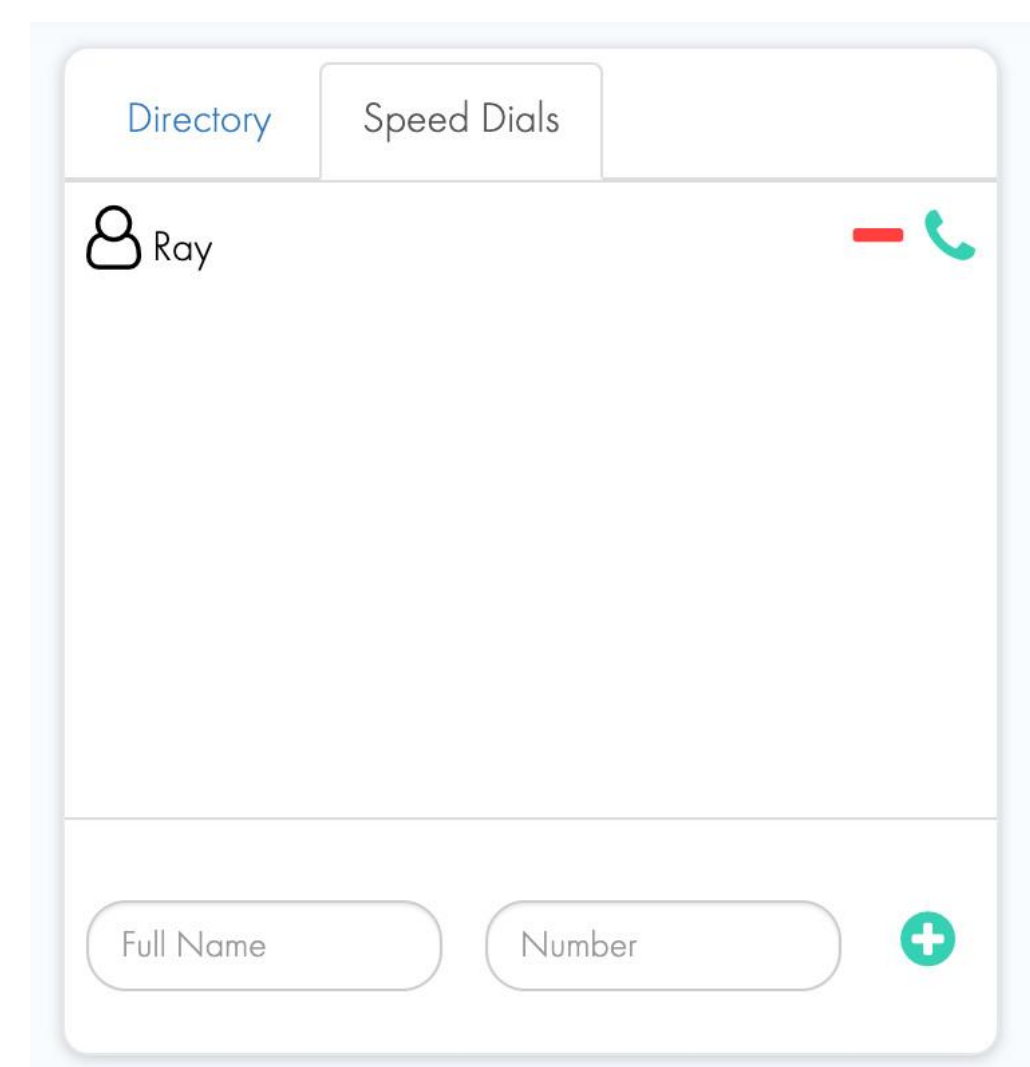
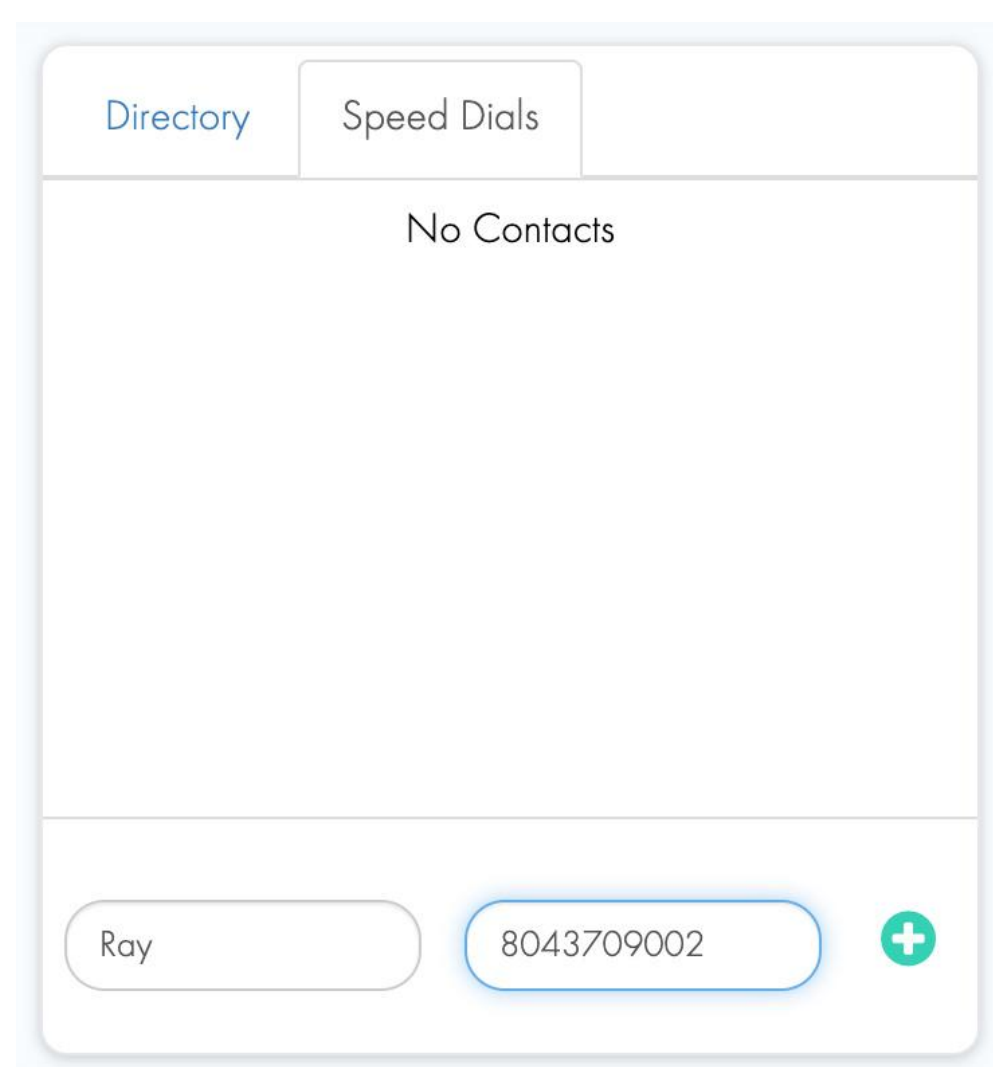
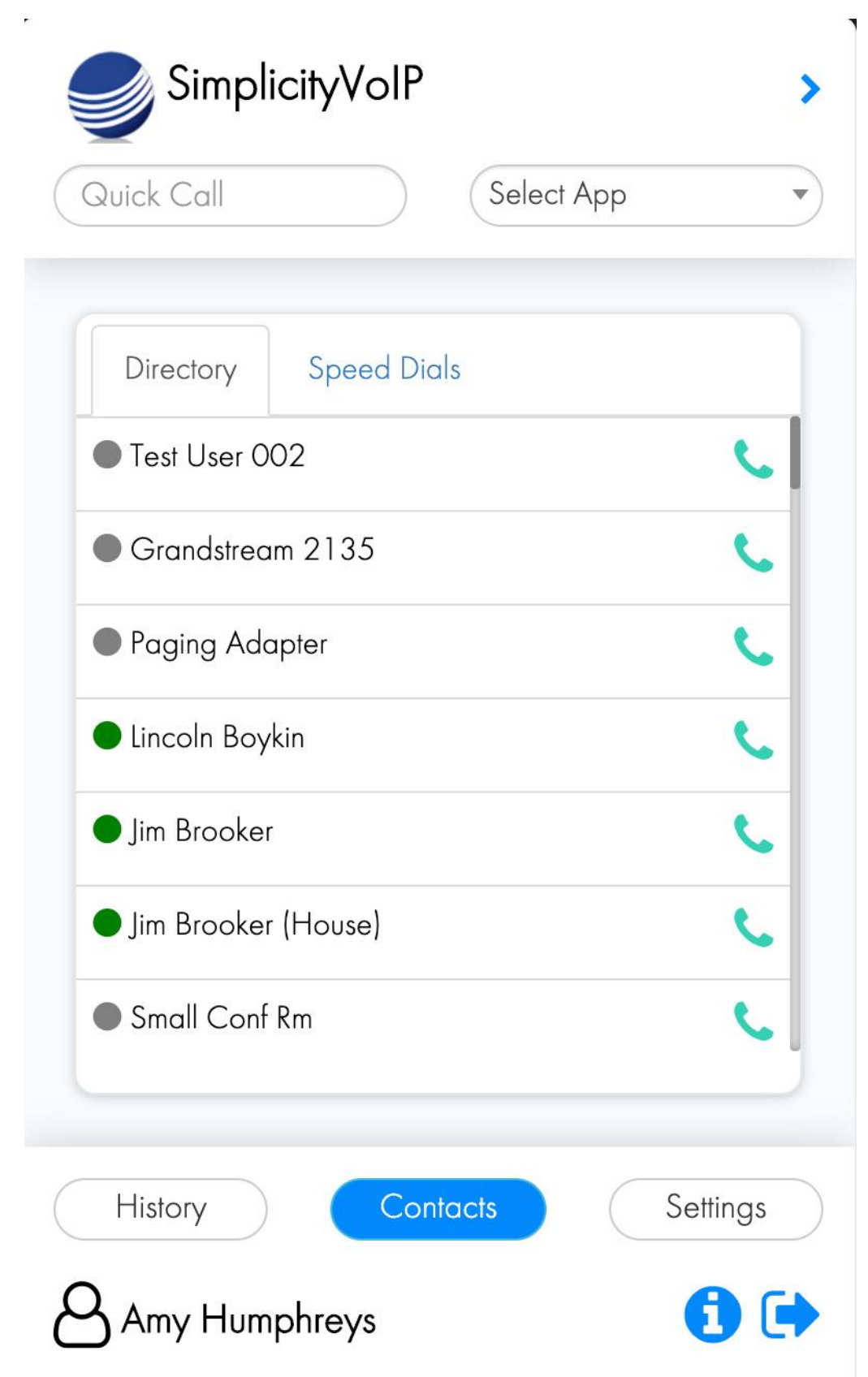
Contacts

To view the contacts in your client portal, select the contacts tab.

Once in the contacts tab, the Directory tab displays your full contact list.

The Speed Dials tab, allows you to identify and log commonly used contacts and 10-digit numbers. Enter name. number and select green plus button  to add contacts

To remove a contact from Speed Dials, select the red dash icon 

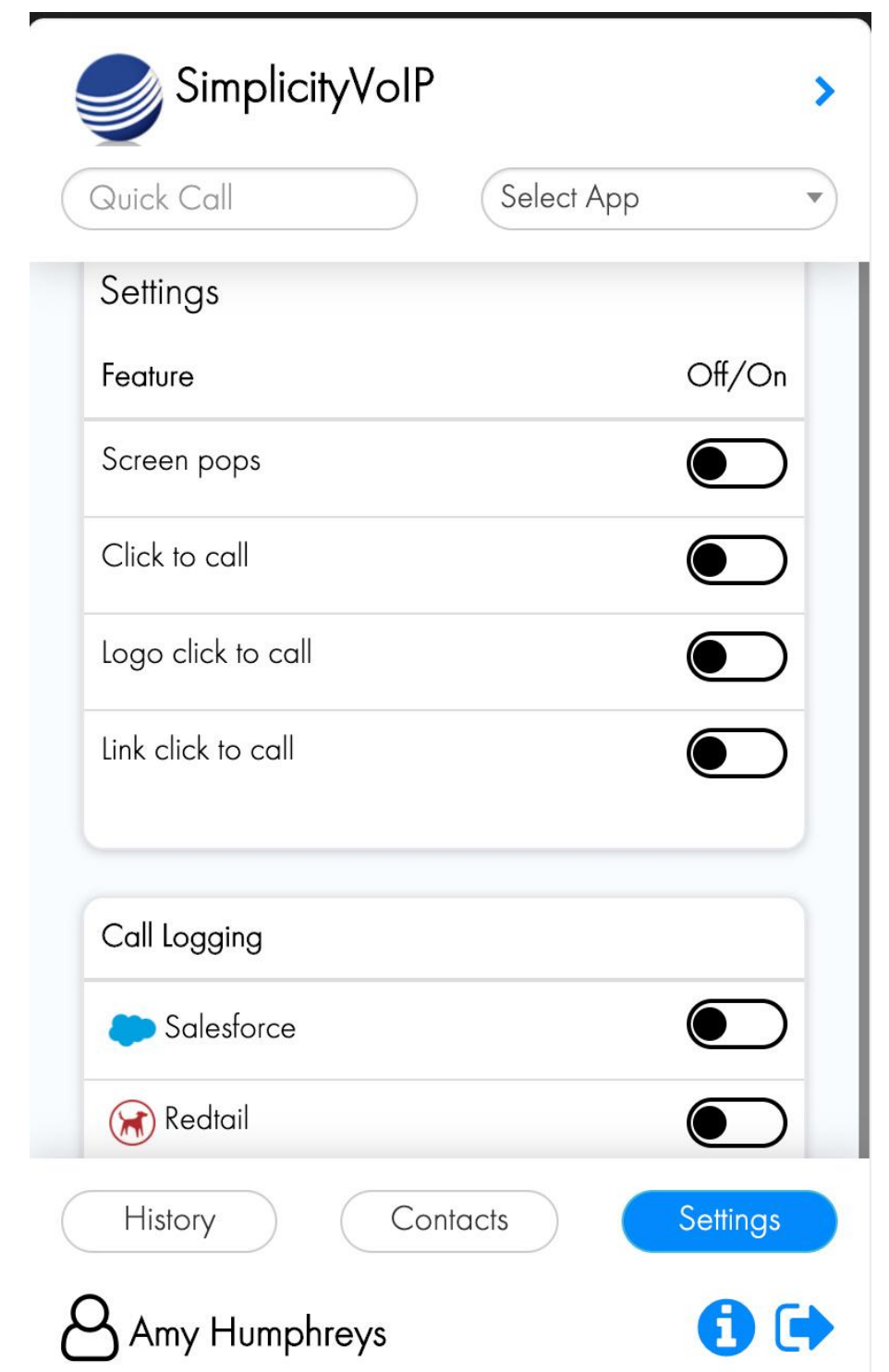


Contacts in the Directory and Speed Dials tab, can be called by clicking the green phone icon 

Settings

From the Settings tab, you have the ability to turn on/off the following features:

Settings	
Feature	Off/On
Screen pops	☒
Click to call	☒
Logo click to call	☒
Link click to call	☒

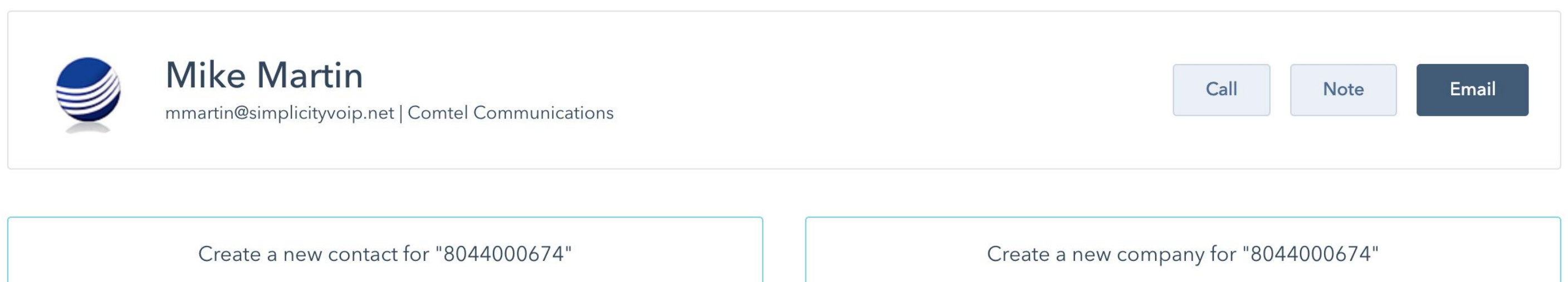


Screen Pops

When this feature is enabled, any incoming call will open a new tab in the designated CRM app, searching for the contact within that CRM.

HubSpot Example

When you receive an incoming call, a new tab will appear with the associated contact info based on caller ID

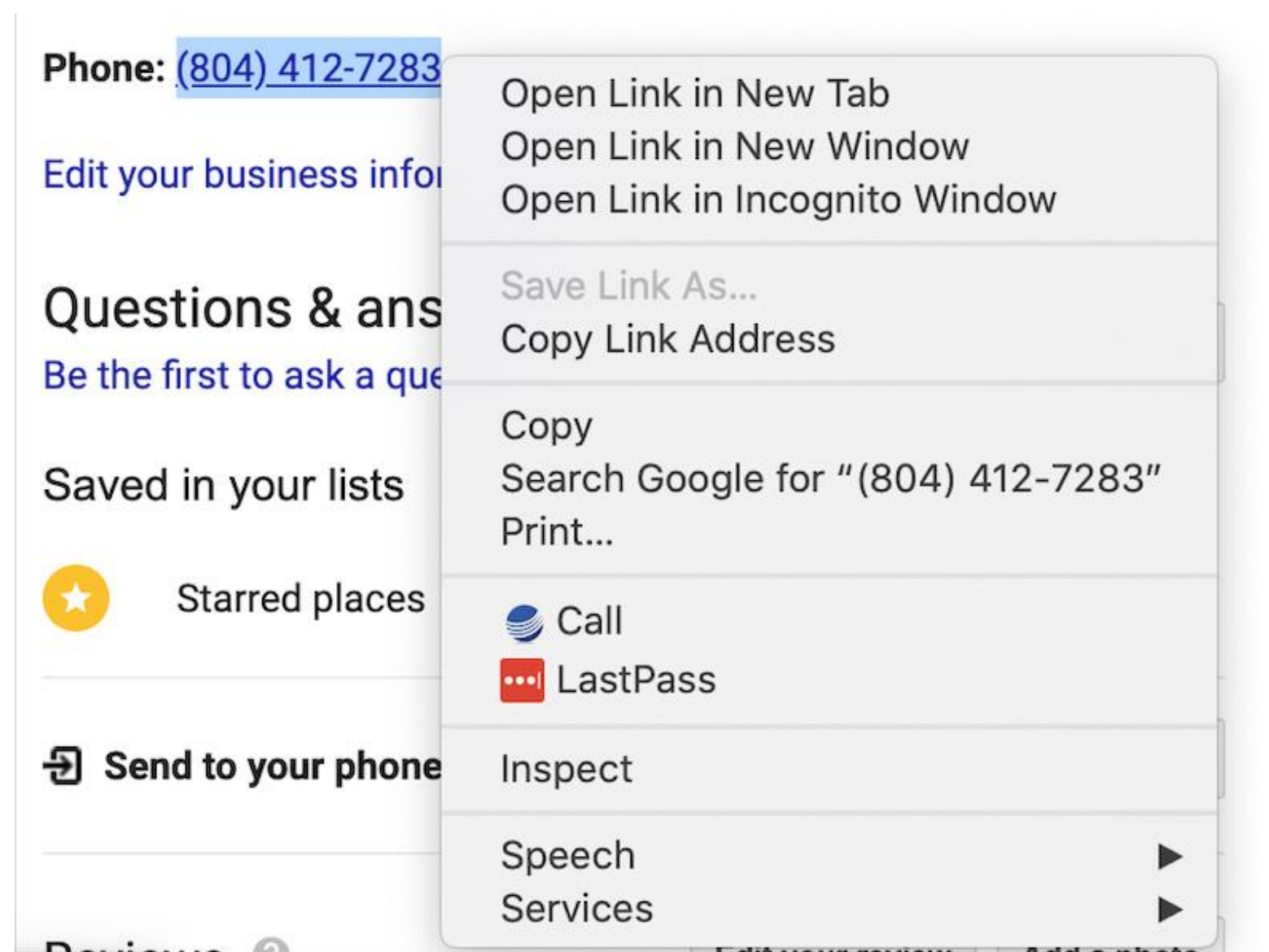


Click to Call Options

This feature allows you to dial a phone from any website through the Chrome browser by highlighting the 10-digit number and right-clicking the Simplicity logo .

Logo click to call:

By enabling this feature, the Simplicity logo  will appear by any 10-digit number on a website through the Chrome browser. You can dial the 10-digit number by clicking the Simplicity logo . .



Phone: (804) 412-7283 

Link click to call:

By enabling this feature, the 10-digit number will be underlined on a website through the Chrome browser. You can dial the 10-digit number by clicking the underlined number.

Phone: (804) 412-7283

Call Logging:

To log calls made through the integration extension into your CRM, turn on/off the feature. You will be prompted to log into your CRM to proceed. The credentials in your CRM will be linked and call activity will be logged.

