

# HubSpot Trusted Call Completion Phone user Guide

Updated 2023-06

This is an in-depth guide to the various features that Quality Voice and Data's Trusted call Completion Phone provides to HubSpot users. If you still need to install our Softphone please follow these instructions: [Installation Instructions for the QVD CRM Softphone](#).

## VOICE

### Placing Calls

To place calls using the CRM Softphone, you have two options:

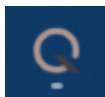
1. Click-to-dial out of HubSpot off a Contact or Company record.
2. Manually dial within the Desktop window.

1. a. To click-to-dial out of HubSpot. Navigate to the contact or company you wish to call within HubSpot itself.  
b. Select the "Call" icon under the contact/company name

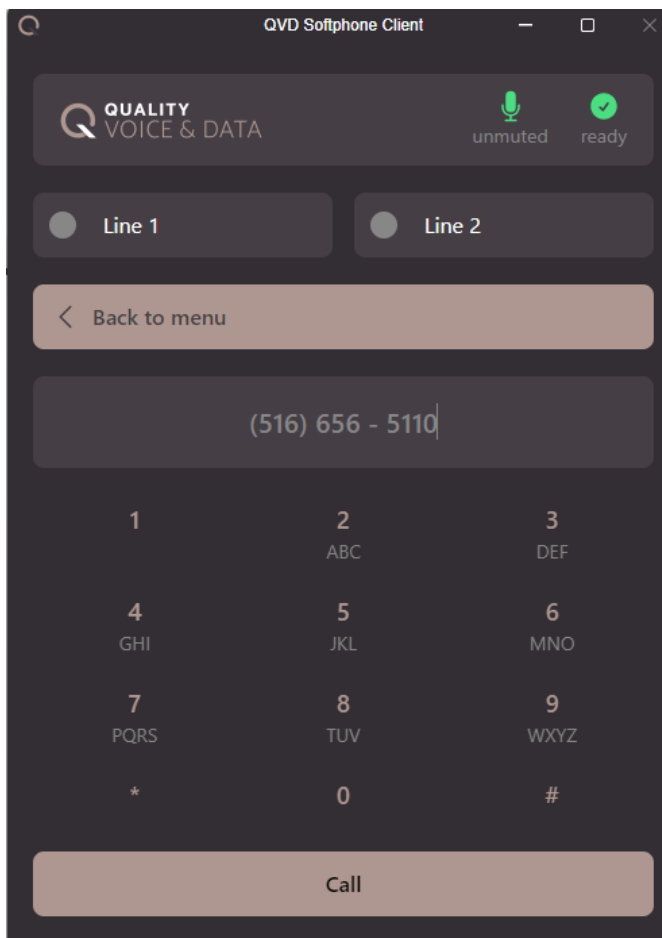
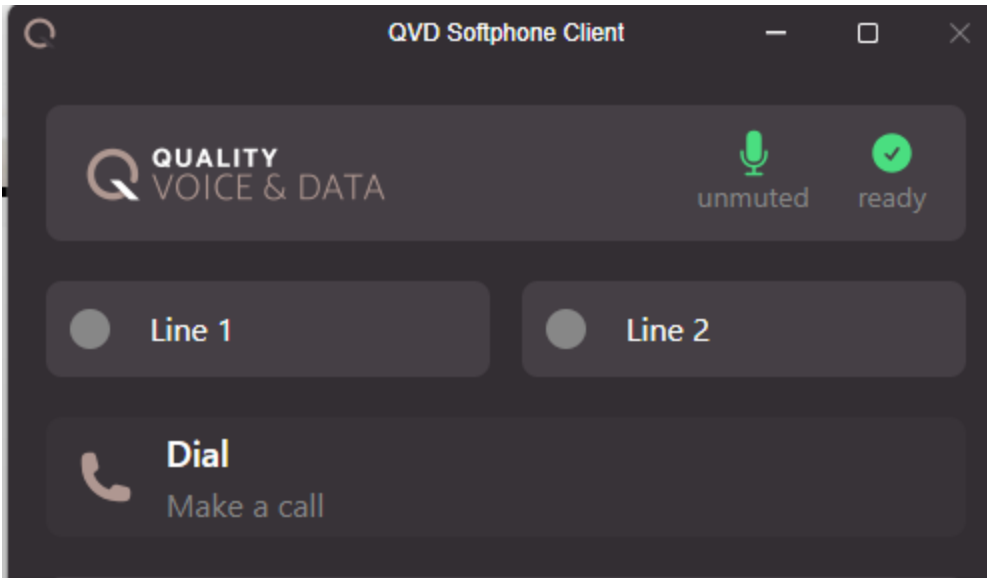


- c. Select the number you wish to call.  
Note: You may need to set the default in the call-window to "QVD CTI" if it is not set already.

2. a. To manually dial, open the desktop window that has the QVD logo as its icon:

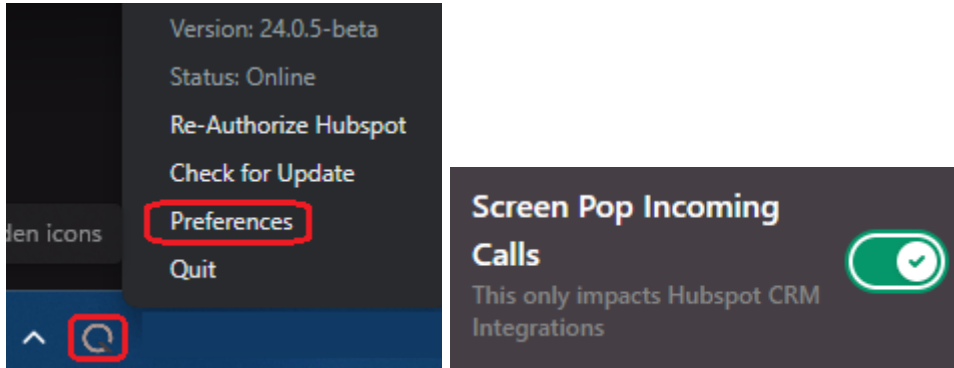


- b. Click the "Dial" button and type or paste the number you wish to dial. Then press either the "Call" button or hit enter to place the call.



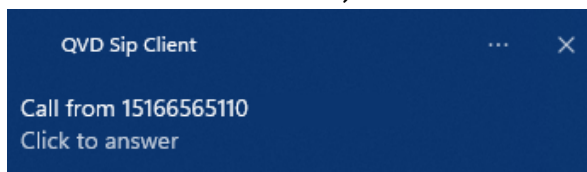
## Receiving Calls

By default, when you receive a call that matches a contact or company in HubSpot, the related record will automatically be opened in your default browser. This can be disabled in the preferences menu:

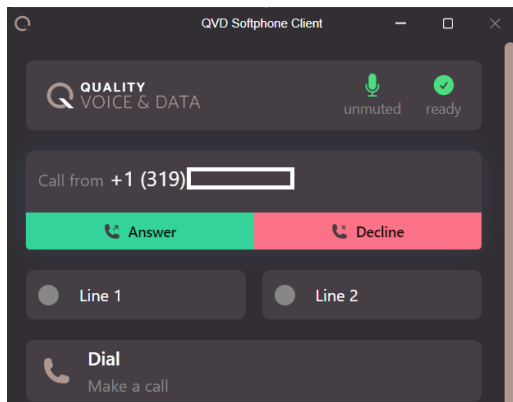


When the call starts ringing, you have three options for answering the call:

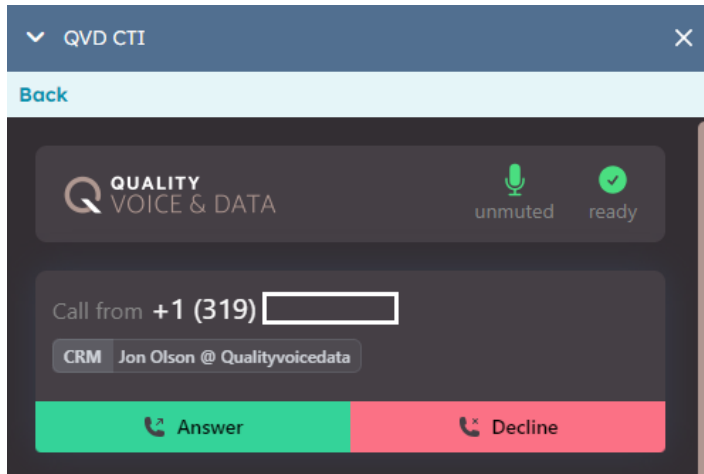
1. The Windows notification (requires notifications to be enabled and Do Not Disturb to be disabled)



2. The incoming call section of the desktop window

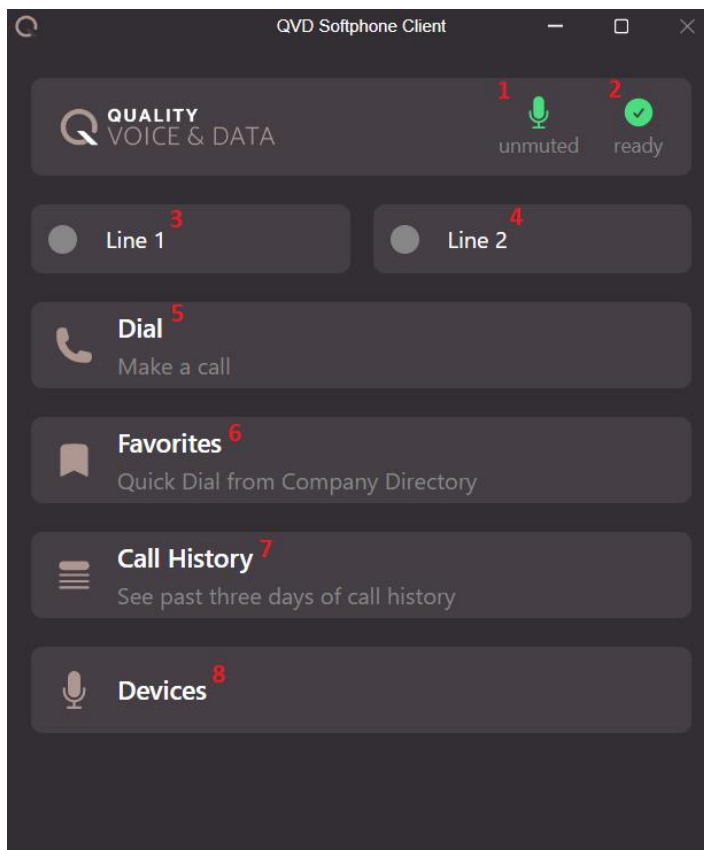


3. The HubSpot widget (if an outbound call was recently placed to open the widget)



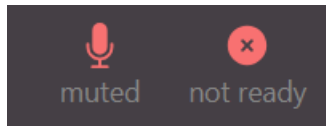
### Main View

In the main menu of the application (accessible from either the Desktop Window or the HubSpot widget after making a click-to-dial call), several features are available such as controlling mute and Do Not Disturb (DND) settings, dialing from favorites menu, accessing call logs, and changing audio devices.

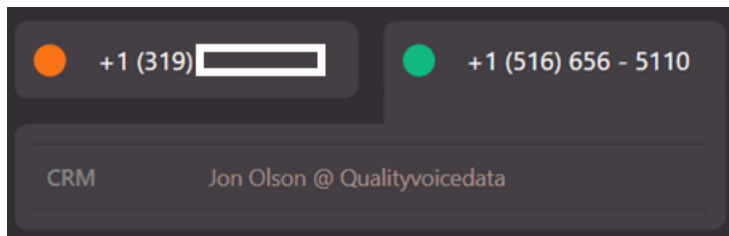


1. Mute/unmute toggle button; will show as red when muted.

2. Ready/DND toggle button; will show as red when Do not Disturb is enabled



3. Line one tab; will show as green light when connected; and yellow when on hold; the active line will be connected to an information box below; in below example, line 2 is active and line 1 is on hold
4. Line two tab; will show as green light when connected; and yellow when on hold



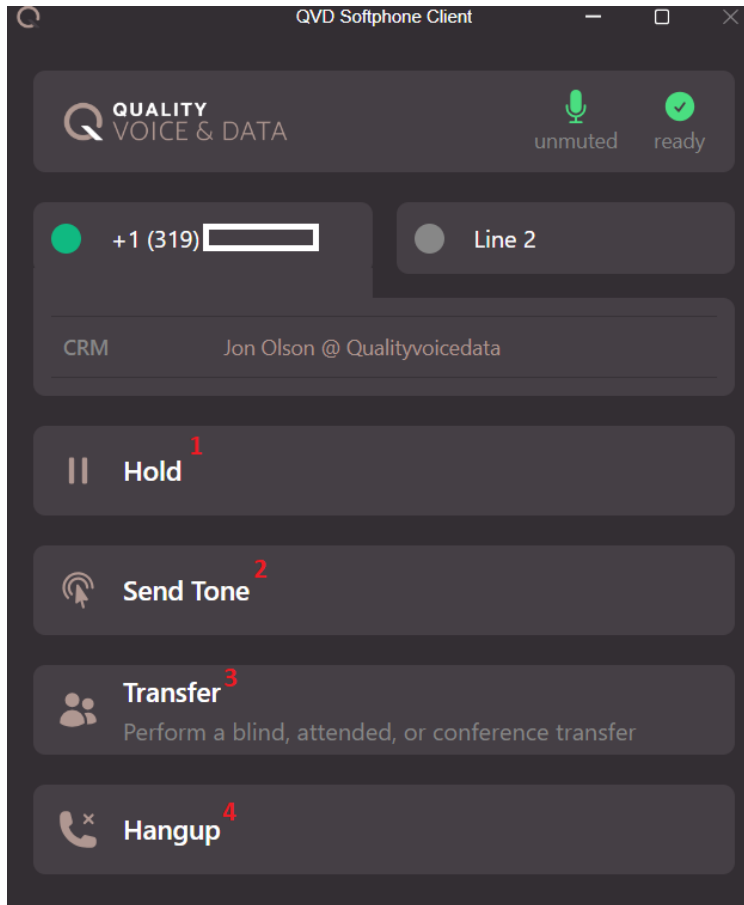
5. The manual dial menu
6. The favorites menu (described in more detail in Favorites Menu section)
7. The call history menu
8. The audio device selection menu; allows you to change audio source for microphone and output device

### Favorites Menu

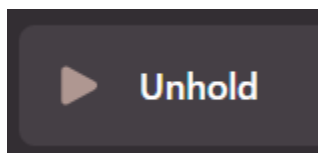
In the main menu or the attended transfer menu covered below, you have the option of using the favorites menu to dial numbers from a PBX-wide directory list. This list can be updated by sending an email to [noc@qualityvoicedata.com](mailto:noc@qualityvoicedata.com) or contact your administrator.

### Active Call Options

During an active call you have the following features available:



1. Toggles putting the call on hold, will look like this when call is in hold state:



2. DTMF Tones Menu; used to send tones through the call-in order to navigate IVR systems.
3. Accessing the transfer menu (Described in the next section)
4. Hanging up the call

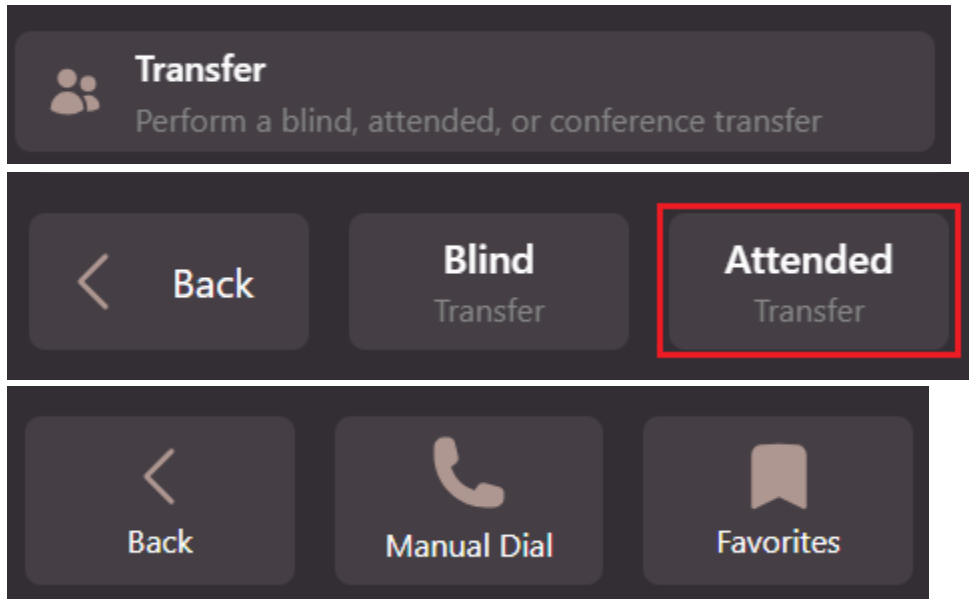
### Transfer Menu

During an active call, you have an option to perform warm/attended and cold/blind transfers as well as conference a 3<sup>rd</sup> party on using the “Transfer” menu.

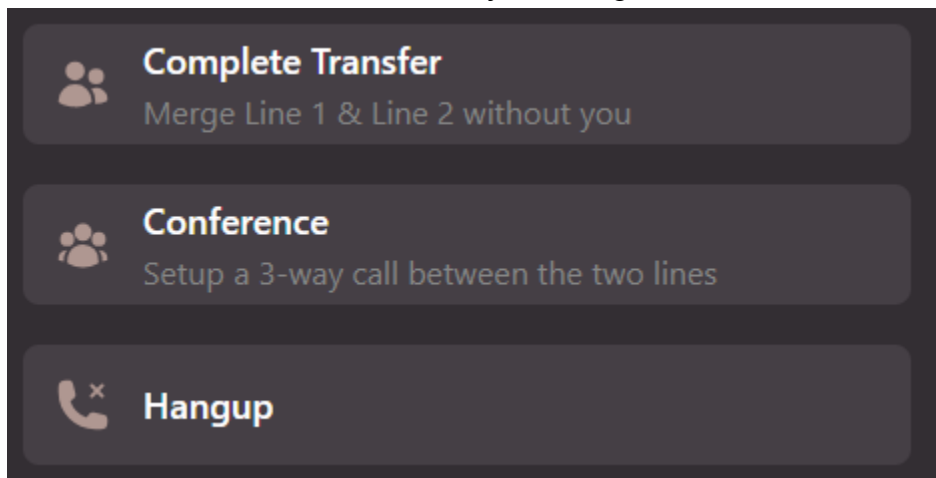
To perform an attended transfer/conference call:

1. Click on the “Transfer” button.

2. Click on the “Attended” button.
3. Enter either the manual dial or favorites menu to call the 3<sup>rd</sup> party.



4. After the third party answers the phone, the call with them will become the active call on line 2. Line 1 will remain on hold. You now have the option to either complete the transfer, which will join lines 1 and 2 without you, conference the two lines together with you, or to hang up. You can also switch between the lines by clicking the tab for the line.

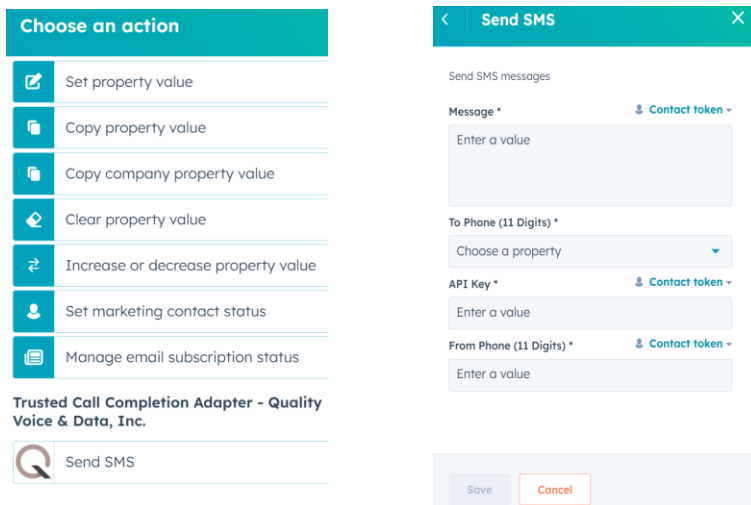


# SMS

SMS capabilities can be described in two categories: Conversational and Automated.

## Automated Text

Upon installing the QVD Phone the first time, a workflow action titled “Send SMS” will be added to your HubSpot account. This action will allow you to send text messages “from” any text enabled number in your account, “to” any contact telephone record a variable data message utilizing any HubSpot fields based on a Workflow Action.



## Conversational Text

HubSpot does not currently support texting or texting integrations. Texting will work via an email interface. There are two options for handling this:

1. Personal email inboxes.

If your HubSpot users have personal work emails attached to their HubSpot account, they can be associated to their direct line. To send an SMS send an email to their 10-digit phone number at textbetter.com (ex. [5166565110@textbetter.com](mailto:5166565110@textbetter.com)), from the contact record or an existing ticket or conversation. Recipients will receive the SMS from the user’s direct line and it will be logged in HubSpot as any other email would be.

2. Conversation/ Shared inboxes



You can also set up shared inboxes for use with multiple accounts or team inbox that only one user has access to in order for it to act as a alternative phone number to send/receive texts on.

To set up a team inbox, go to the Settings page within HubSpot and scroll down to Tools -> Inbox -> Inboxes. Then in the top right you can click "Actions" -> "Create new inbox"

From there, name the inbox and provide access as you wish. These things can be changed later if needed.

### Create team inbox


Team inboxes let teams manage all one-to-one communication from a shared inbox. Conversations in this inbox can only be seen by members of this team inbox.

Team inbox name \*

QVD SMS Team




- Available to everyone  
 Select users and teams who can edit

Who has access:

 Support (6 members) ×

Search 

**Teams**   Users

-  Landing Page Contractor  
  Sales  
  Support

Select "Team Email" for the channel you will set up, then click "Other Mail Account"



### Team email

Connect a company email address such as [sales@mycompany.com](mailto:sales@mycompany.com) or [info@mycompany.com](mailto:info@mycompany.com)



### Other mail account

Connect other accounts by setting up email forwarding

You should leave the “From” name setting as Agent @ Company for better tracking of who is using the inbox, this will not impact how texts display on the recipient’s device.

You should leave the From address as the default and have a team signature of “]” to signal the end of the text message so that the texting platform does not include previous messages.

**From name** ⓘ

Agent and company name ▼

Agent name from Quality Voice & Data

**From address** ⓘ

- Use default
- Customize from address

hello-7@qualityvoicedata.hs-inbox.com

**Team signature** ⓘ

Simple HTML

]

**B I U T<sub>x</sub> ☰ ☷** | **Insert Token** ▼

Remove team signature

Whether you automatically assign conversations started with the team inbox or create tickets is up to your exact use case. The last screen will show you the email address (ex. hello-5@qualityvoicedata.hs-inbox.com) you will provide to support ([noc@qualityvoicedata.com](mailto:noc@qualityvoicedata.com)) in order to text-enable the shared inbox.