



NowCerts Integration

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Introduction

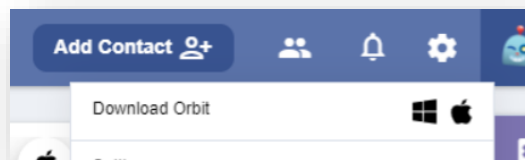
Lightspeed partners create critical links: connecting our product solutions with our clients. Lightspeed Voice has integrated with NowCerts to provide call pop ups on inbound and outbound calls, as well as data syncing into NowCerts.

This integration requires several steps for complete setup. The Lightspeed Voice Integration Setup and Orbit Installation portions of this guide need to be completed for call pops to work. For call data syncing from Lightspeed Voice into NowCerts, the Lightspeed Voice Setup portions of this guide needs to be completed. To have click to call in NowCerts, the Lightspeed Voice Chrome extensions needs to be installed.

Configuration

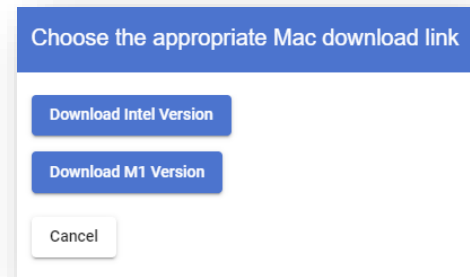
Orbit Installation

To get started, you will need to download the installer. You can access this by clicking the gear icon in the top right corner while signed into Lightspeed Voice. You will see a button for Mac and Windows. Choose the appropriate button.



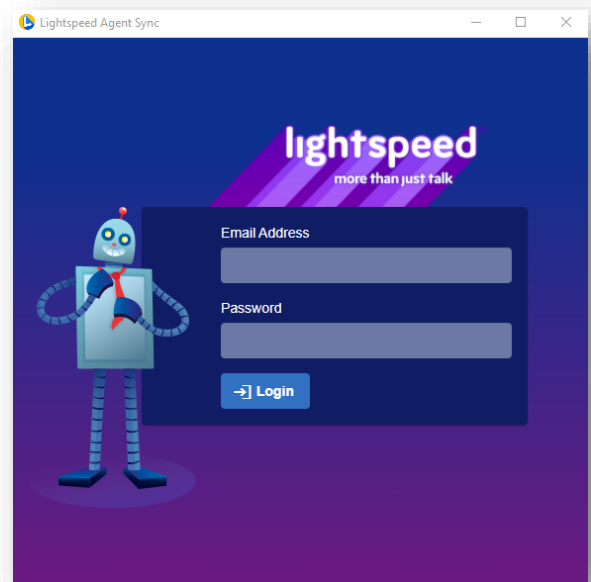
If you are installing on a Mac, it will prompt you for your processor version as there is two different version available on Mac and require different applications. You will need

to select either Intel or M1, and you can determine which processor your Mac is running by clicking the Apple icon in the top left corner of the menu bar, and then selecting “About This Mac”. If you see “Chip” listed, you have an Apple M1 processor. If you see “Processor”, you have an Intel processor.



This can also be installed and configured by Lightspeed Voice’s Client Success Team. After downloading, you will need to run the installer. This may require administrator permissions depending on your Operating System and office setup.

If you have had Lightspeed Voice’s AgentSync installed in the past, you may be automatically signed in. If not, you will need to sign in using your Quantum, Connect, or Automate credentials.

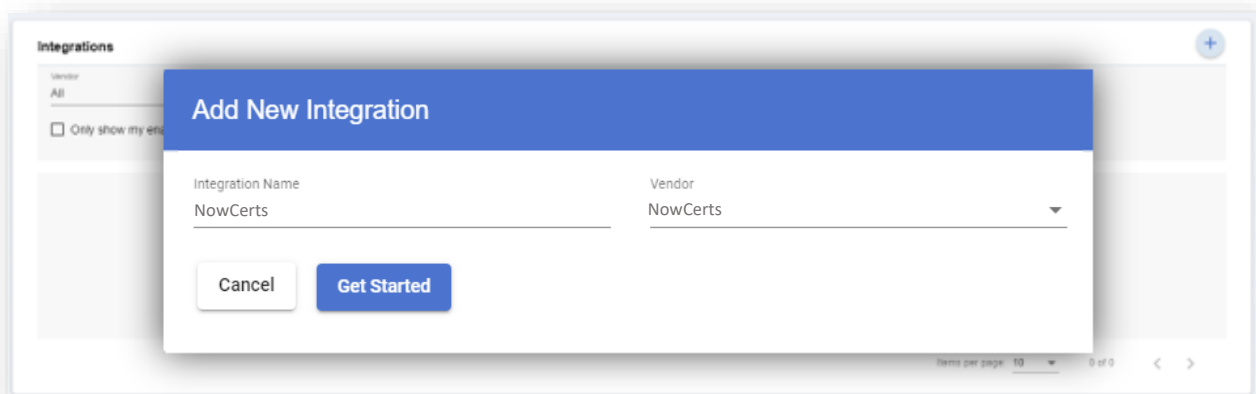


Lightspeed Voice Integration Setup

After getting Orbit installed, admins or users with permission will need to go to the *Integrations* page in Quantum, Automate, or Connect either by navigating through the left navigation menu to *Management -> Lead Settings -> Integrations*, or by following the link below:

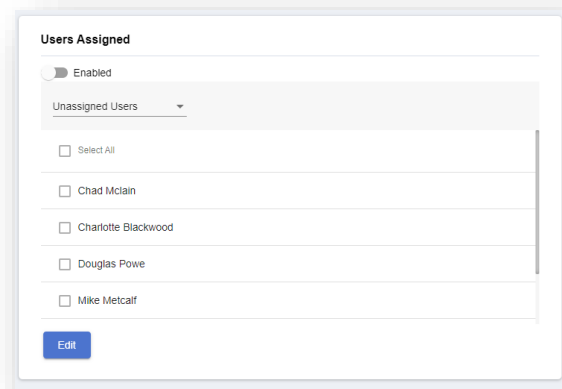
<https://app.lightspeedvoice.com/management/lead-settings/integrations>

If you have had Lightspeed Voice's AgentSync installed in the past, we may have created the integration for you automatically based on your existing settings and you may see an integration already exists. If not, you will need to click the plus symbol located near the top right. This will pop up a window for you to fill out. When you create an integration, you will need to give it a name and select a vendor from the list and click "Get Started".

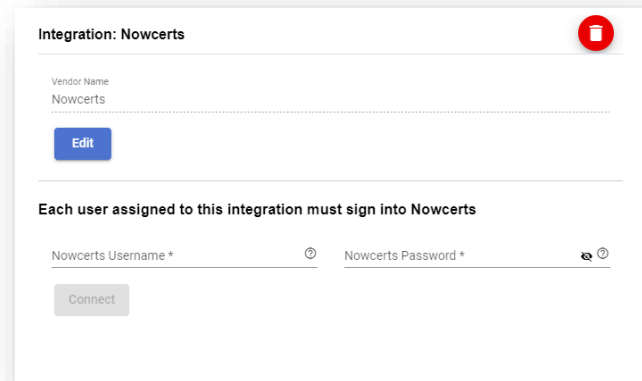
A screenshot of a web application interface showing a modal window titled "Add New Integration". The modal has a blue header bar with the title. Below the header, there are two input fields: "Integration Name" with the text "NowCerts" and "Vendor" with a dropdown menu showing "NowCerts". At the bottom of the modal, there are two buttons: "Cancel" and "Get Started". In the background, a blurred view of the "Integrations" page is visible, showing a list of integrations and a "Vendor" filter set to "All".

It is important to note that multiple integrations can be enabled for the same vendor. Integrations can also be made for individuals, groups of users, or the entire team.

Once an integration is added, users with permission can enable or disable users by filtering for "Unassigned Users" and then clicking "Edit." From there you will be able to check each user the integration should be applied to.

A screenshot of a web application interface showing a modal window titled "Users Assigned". The modal has a header bar with a toggle switch labeled "Enabled". Below the header, there is a dropdown menu labeled "Unassigned Users". Underneath the dropdown, there is a list of users with checkboxes next to their names: "Select All", "Chad McInain", "Charlotte Blackwood", "Douglas Powe", and "Mike Metcalf". At the bottom of the modal, there is a blue button labeled "Edit".

Next, Lightspeed Voice will need to be connected to the 3rd party application. Create a new user in NowCerts with their primary role set to "API integration". Then have all users authenticate using that user's credentials.



Integration: NowCerts

Vendor Name
Nowcerts

Edit

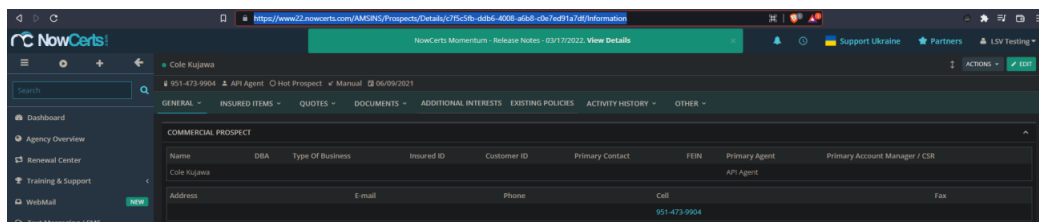
Each user assigned to this integration must sign into Nowcerts

Nowcerts Username * Nowcerts Password *

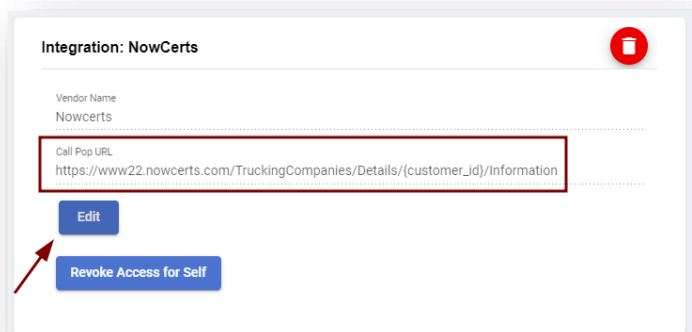
Connect

Each user assigned to the integration will need to go in and authenticate. This is done by using the username and password of the newly created user.

Once authenticated you will need to update the Call Pop URL. To determine what your Call Pop URL should be open a record in NowCerts and copy the URL.



You will then need to go back to the integration in Quantum/Connect and edit the Call Pop URL. Paste the URL from NowCerts into the Call Pop URL field.



Integration: NowCerts

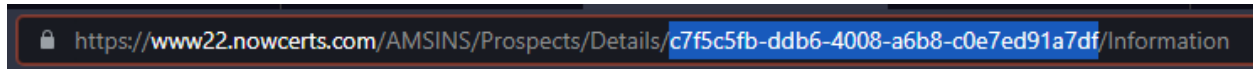
Vendor Name
Nowcerts

Call Pop URL
[https://www22.nowcerts.com/TruckingCompanies/Details/\(customer_id\)/Information](https://www22.nowcerts.com/TruckingCompanies/Details/(customer_id)/Information)

Edit

Revoke Access for Self

There should be a unique identifier for the record you were viewing in NowCerts as seen below.



That portion will need to be replaced with `{customer_id}` as seen below.

A screenshot of the 'Edit Integration' form. The form has a blue header with the title 'Edit Integration'. Below the header, there are two input fields: 'Integration Name' with the value 'NowCerts' and 'Call Pop URL' with the value https://www22.nowcerts.com/AMSINS/Prospects/Details/{customer_id}/Information. The `{customer_id}` placeholder is highlighted in orange. Below the URL field, there is a grey box with the text: 'Use the {customer_id} shortcode to automatically insert the customer ID into your URL.' At the bottom of the form, there are two buttons: 'Cancel' and 'Save'.

After adding users and authenticating, you can decide which *Triggers* you want to be active. For NowCerts, the *Triggers* are:

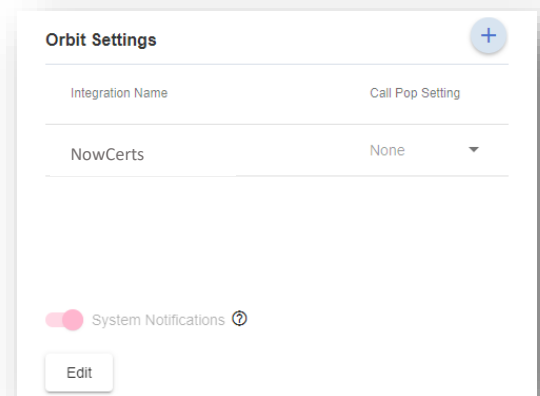
Triggers		
Name	Description	Enabled
Send Call Data on Hangup	Sends Call Data on Hangup to your chosen integration vendor.	<input checked="" type="checkbox"/>

The last step is to enable the integration so it begins running.

A screenshot of a toggle switch labeled 'Users Assigned'. The toggle is currently turned on, indicated by a green circle and the text 'Enabled'.

Orbit Settings

Once your integrations are made in Lightspeed Voice and you are signed into Orbit, in the Orbit app you will see a table titled *Orbit Settings* in the middle. You should see the NowCerts integration that was configured earlier, and it will be set to *None*. If you would like to receive call pop ups when answering inbound, outbound, or both types of calls, select “Edit” and then select using the drop down. If there are no integrations or you would like to add another, you can do so using the plus symbol near the top right. This will pop up a window to Quantum or Connect where you will be able to configure the integration.

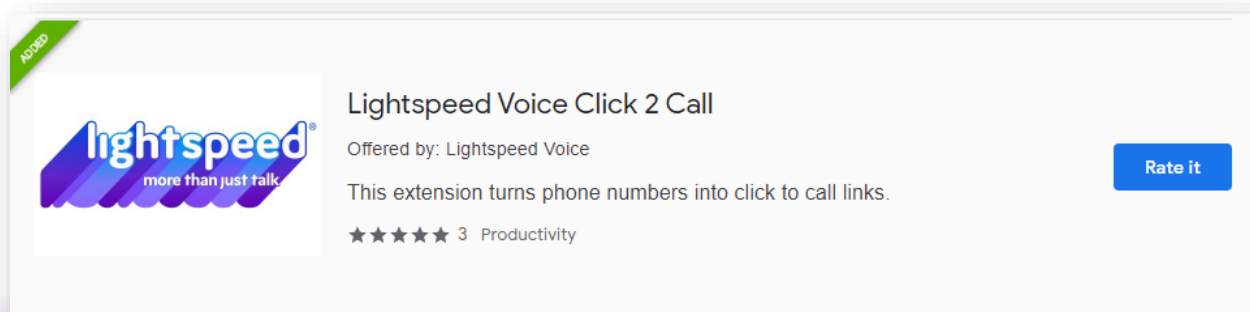


It is important to note, you can have multiple integrations running and configured to different call pop settings at any time.

Chrome Extension Setup

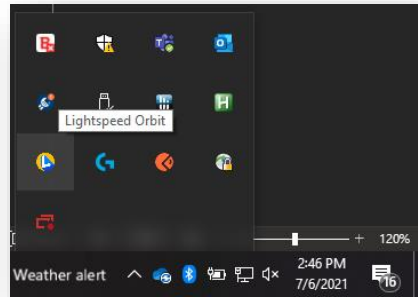
The Chrome extension will be needed enable click-to-call in NowCerts. It can be added by searching “Lightspeed Voice” in the Chrome Store:

<https://chrome.google.com/webstore/category/extensions>

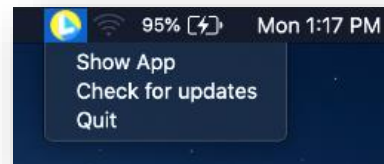


Troubleshooting

If you are having issues with call pops, ensure that Orbit is running, your integration is connected, and you have a *Call Pop Setting* selection made. You can verify Orbit is running by using showing hidden icons in the taskbar of Windows. If you see an icon like the one highlighted on the right, it is running.



If you are on a Mac you can verify it is running by looking for the same icon on your doc.



If you are having issues with any of the triggers, ensure they are enabled.

If you continue to experience issues, you can use the Lucky support button in the top right of app.light-speedvoice.com to submit a ticket or give us a call!

