

Telephone and Virtual Phone VoIP

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RingCentral

With RingCentral, you can view recent and historic call volume from the new Call Center and use the incoming call notifications to bring up customer records with a click or start adding a new contact with the phone number already filled in.

Screen pop-ups occur when calls come through. If the caller ID matches a contact, we'll display an alert so you can click to bring up the customer record. If it doesn't match any contacts, it'll give you a prompt to start adding a new contact with that number filled in.

We also log the call history and have reporting to show call volume and to tie calls to users. Once you're connected, you'll see a "Call Center" menu pick under Administration which has some initial reporting.

We also have "click to call" from the contact and appointment details pages (clicking on the phone numbers).

Connecting with RingCentral

- To connect your RingCentral account to serviceminder.io, go to Control Panel > Integrations > Other
- Select the Connect button for RingCentral.
- You'll be prompted to log in to RingCentral and approve the connection.

Note: RC incoming call notifications happen on the Web, not the mobile app. RingCentral is not integrated with your mobile/cell phone provider. Dial from the app just uses your cell phone provider, so if you click the hyperlink on the phone number in the contact record on the app it will open cell call just like if you were dialing it from your phone.

Vonage

serviceminder's Vonage integration brings call data/incoming calls right into serviceminder.

To connect your Vonage account to serviceminder, just go to Control Panel>Integations>Other and click "Connect" under Vonage.

Quo (formerly OpenPhone)

In Control Panel > API Keys, create a key to use for Quo.

Add a New API Key

Application*

OpenPhone

Merge Duplicates

Merge duplicates?

Fields

Name Email Phone Address Postal Code

Branding Scope

Branding-scoped?

Lead Distribution

Enable this key for lead distribution?

You can name your key, configure your settings, and be sure to select **OpenPhone** as the **Call Center Provider**.

Call Center Provider

OpenPhone ▼

Then in your **Quo account**, under **Settings > Webhooks**, you'll create a webhook using our custom url: https://serviceminder.io/webhook/openphone/*{api_key}*

Replace with your unique API key you just created in serviceminder.

Select the events you'd like to pass over to SM and save.

Event Types

Listen to changes based on different event types

Calls & messages

Listen to events based on call and message activity

5 selected

- call.completed**
Occurs whenever a call is completed.
- call.ringing**
Occurs whenever a call is ringing.
- call.recording.completed**
Occurs whenever a call recording is ended.
- message.received**
Occurs whenever an incoming message is received.
- message.delivered**
Occurs whenever an outgoing message is delivered.

The event notifications and loggings are:

- When a call comes in on your Quo number, you'll receive a banner notification in your serviceminder account; this will say it either matches an existing contact or asks if you'd like to create a new contact if it is an unmatched number.

Incoming Call

Incoming call from 4698080025. A contact does not exist for this number. Would you like to start creating a new one?

Thursday, February 16, 2023

- When a text message is sent or received by a contact's number, a note will be added onto their contact details.
 - For calls, in Call Center you can see a record of inbound and outbound calls.
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