



How to Connect Kixie to Monday.com

1. Introduction

The integration between Kixie and Monday.com allows sales and project teams to streamline their workflows by automatically logging call information, creating tasks, and synchronizing data directly within Monday.com boards. This guide provides a detailed step-by-step process to connect Kixie to Monday.com, ensuring a seamless setup for your teams.

2. Prerequisites

Before starting the integration process, ensure that you have the following:

- An **active Kixie account** with admin access.
 - A **Monday.com account** with admin privileges.
 - The necessary permissions to install apps in both platforms.
 - An **API token** from Monday.com (if required).
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3. Step-by-Step Integration Guide

Step 1: Access Kixie Dashboard

1. Log in to your **Kixie** admin account.
 2. Go to the **Dashboard** and click on the **Integrations** tab.
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Step 2: Navigate to Integrations

1. In the **Integrations** section, click on **Browse Integrations**.
 2. Search for **Monday.com** in the integrations list.
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Step 3: Find and Select Monday.com

1. Click on the **Monday.com** integration tile.
 2. Select **Install Integration** to proceed.
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Step 4: Authorize Monday.com Access

1. You will be redirected to the **Monday.com login page**.
 2. Enter your Monday.com **login credentials** and click **Sign In**.
 3. Review the requested permissions and click **Authorize** to allow Kixie to access your Monday.com data.
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Step 5: Configure Integration Settings

1. After authorization, return to the Kixie dashboard.
 2. Go to **Settings > Integrations** and click on **Monday.com**.
 3. Customize the following settings:
 - **Call Logging Preferences:** Choose to log inbound, outbound, or both types of calls to Monday.com boards.
 - **Activity Logging:** Enable or disable logging of call notes, tags, and voicemail.
 - **Task Creation:** Configure settings to automatically create tasks for follow-ups based on call outcomes.
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Step 6: Map Fields Between Kixie and Monday.com

1. In the **Field Mapping** section:
 - Map **Kixie fields** (such as call duration, status, and notes) to **Monday.com columns** (such as status, notes, or due dates).
 - Ensure key fields such as **Phone Number, Contact Name, and Call Notes** are mapped correctly.



2. Save the settings.

Step 7: Test the Integration

1. Make a **test call** using Kixie.
2. Check if the call details are logged correctly in Monday.com boards, including:
 - Contact information.
 - Call duration and time.
 - Call notes, tags, and task creation (if enabled).
3. If all information appears correctly, the integration is successful.

4. Common Troubleshooting Tips

- **Issue:** Call logs not appearing in Monday.com.
Solution: Ensure that the **API token** is active and the integration is enabled in both platforms.
- **Issue:** Field mapping errors.
Solution: Revisit the **Field Mapping** settings and ensure that all mandatory fields are correctly mapped.
- **Issue:** Authorization error when connecting to Monday.com.
Solution: Re-authenticate by removing the integration and reinstalling it.

5. Best Practices for Using the Integration

- **Use call tags and notes** to organize and categorize tasks efficiently in Monday.com.
- **Enable automatic task creation** for follow-up actions based on call outcomes to ensure timely lead management.
- **Schedule regular sync checks** to verify that all call data is accurately logged.

6. Conclusion



Integrating Kixie with Monday.com allows teams to centralize communication management, streamline workflows, and improve productivity. By following this guide, you can ensure a smooth and effective integration process, enabling your team to manage tasks and calls efficiently within Monday.com.



Kixie and Monday.com Integration: Features and Benefits

Integration Overview

The integration between Kixie and Monday.com is designed to streamline sales communication and project management workflows. By connecting Kixie's advanced call capabilities with Monday.com's task and project management tools, teams can automatically log call activities, manage tasks, and gain real-time insights directly within Monday.com boards. This integration helps sales and project teams improve efficiency, track performance, and enhance customer interactions.

Key Features

1. Automatic Call Logging

Description:

All inbound and outbound calls made through Kixie are automatically logged in Monday.com. The logs include details such as call duration, time stamps, contact information, call notes, and, if enabled, call recordings.

Benefit:

Eliminates the need for manual call logging, ensuring accurate and up-to-date records. Team members can access a complete history of customer interactions directly from Monday.com boards.

2. Click-to-Call Functionality

Description:

Users can initiate calls directly from Monday.com boards by clicking on any contact's phone number. This functionality is powered by Kixie's softphone or browser extension.

Benefit:

Reduces manual dialing efforts and minimizes dialing errors, allowing sales teams to connect with leads more efficiently.

3. Automated Task Creation

**Description:**

The integration can automatically create tasks in Monday.com based on call outcomes. For example, if a call requires follow-up actions, a task can be generated with a due date and assigned to a specific team member.

Benefit:

Ensures timely follow-ups and prevents leads from slipping through the cracks, improving sales and project management efficiency.

4. Custom Field Mapping

Description:

The integration allows users to map Kixie call data to custom fields in Monday.com, such as lead status, call outcome, and next steps.

Benefit:

Custom field mapping enables teams to track specific KPIs and tailor reports to their business needs.

5. Real-Time Caller Insights

Description:

When a call comes in, Kixie displays relevant information from Monday.com, such as previous interactions, project status, and assigned tasks. This information is available in real-time during the call.

Benefit:

Empowers team members to provide personalized and informed responses, enhancing customer experience and engagement.

6. Call Tags and Notes

Description:

Users can tag calls with customizable labels and add detailed notes directly from Kixie, which are then synchronized to Monday.com boards.

**Benefit:**

Facilitates better organization and categorization of tasks and calls, making it easier for teams to prioritize and follow up.

7. Power Dialer Integration

Description:

Kixie's Power Dialer integrates directly with Monday.com contact lists, allowing sales reps to automate outbound calling efficiently.

Benefit:

Increases call volume and productivity by minimizing manual dialing and downtime between calls.

8. SMS Integration

Description:

Send and receive SMS messages through Kixie, with all messages automatically logged in Monday.com as part of the communication history.

Benefit:

SMS integration provides an additional communication channel, ensuring timely follow-ups and enhanced customer engagement.

9. Analytics and Reporting

Description:

The integration provides access to detailed analytics and reports on call activities, including call volume, duration, success rates, and agent performance, directly within Monday.com dashboards.

Benefit:

Advanced analytics help managers monitor performance, identify bottlenecks, and make data-driven decisions.

10. Workflow Automation

**Description:**

Create automated workflows that trigger actions in Monday.com based on call outcomes, such as moving tasks to different boards, updating statuses, or assigning tasks.

Benefit:

Workflow automation reduces manual work and ensures that tasks are promptly assigned and updated, improving overall efficiency.

Key Benefits**1. Enhanced Productivity**

By automating tasks such as call logging, task creation, and follow-ups, the integration allows teams to manage higher volumes of activities without increasing workload. Features like Power Dialer and real-time insights streamline workflows and reduce repetitive tasks.

2. Improved Customer Experience

Access to comprehensive call and task histories enables team members to deliver personalized and informed assistance. Automated task creation and real-time insights help reduce response times and ensure that no customer request goes unnoticed.

3. Data-Driven Decision Making

Detailed analytics and reporting provide actionable insights into team performance, customer behavior, and call effectiveness. Managers can use these insights to refine sales strategies and improve project outcomes.

4. Centralized Communication Management

The integration consolidates all communication—calls, tasks, and SMS—within Monday.com boards, providing a unified platform for managing interactions and tasks. This eliminates the need to switch between multiple tools, enhancing efficiency.

5. Seamless Collaboration



By logging all call interactions and notes directly in Monday.com, the integration makes it easy for team members to collaborate on tasks. Shared notes and tags allow teams to access the same information and coordinate responses efficiently.

6. Improved Lead Management

By automatically logging call details and creating follow-up tasks in Monday.com, the integration ensures that all leads are tracked accurately. Automated follow-ups based on call outcomes help in timely lead nurturing.

7. Enhanced Security and Compliance

The integration ensures that all call data and customer information are securely logged and managed within Monday.com, adhering to industry standards for data protection. Role-based access controls and encryption protocols further enhance security.

Conclusion

The Kixie and Monday.com integration is a powerful tool for sales and project teams looking to optimize communication management and improve task tracking. By leveraging advanced calling features, real-time insights, and seamless data synchronization, businesses can enhance productivity, improve response times, and achieve better outcomes.

Would you like to add or modify any sections?