

Customer Relationship Management

The Customer Relationship Management (CRM) Link module is designed to allow you to connect your PBX to your CRM software. This allows the PBX to push call history and caller information to your CRM; in conjunction with [Zulu](#) it also allows Click to Call from your CRM and Call Popups into your CRM on inbound calls.

Supported CRMs at this time

- [Salesforce CRM](#)
 - Requires CRM module 13.0.2 or greater (Beta May 2017)
 - See [supported](#) Salesforce versions
- [Sugar CRM](#)
 - Requires Sugar CRM 6.5 (later versions may not be supported, confirm before purchase)
 - Requires also installing a module on your CRM system
- [Suite CRM](#)
 - Requires also installing a module on your CRM system
- [Zoho CRM](#)
 - Requires CRM module 13.0.2 or greater (Beta May 2017)
- [Connectwise CRM](#)
 - Requires CRM module 13.0.2.1 or greater (Beta July 2017)
- [Generic API](#)
 - Requires CRM module 13.0.2.1 or greater (Beta July 2017)
 - Allows using the CRM module with published API to allow connecting to any CRM.

Features Supported in all CRMs Listed Above, except as noted.

- Call History
 - Send all Call History from the PBX to the CRM. As each call is ended on the PBX and the CDR entries are written a copy of the call history will be sent to the CRM and viewable under the Call History module

Name	Source	Direction	Destination	Duration	Dial Status	Date	Assigned to
Inbound call from "DID:NAGY ANDREW" <1951234567890>	1951234567890	INBOUND	4012	0 seconds	MISSED	10/23/2016 19:50	Andrew Nagy
Inbound call from "DID:NAGY ANDREW" <1951234567890>	1951234567890	INBOUND	4012	11 seconds	ANSWERED	10/23/2016 20:10	Andrew Nagy

- If a call matches the phone number of a Contact, Lead or Account the call history will be shown in those records.

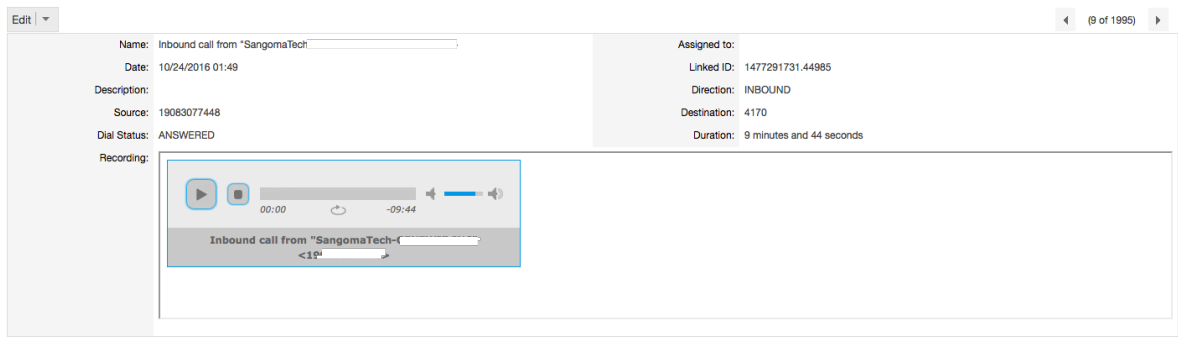
Call History

Create ▾

(1 - 10 of 31) ▶

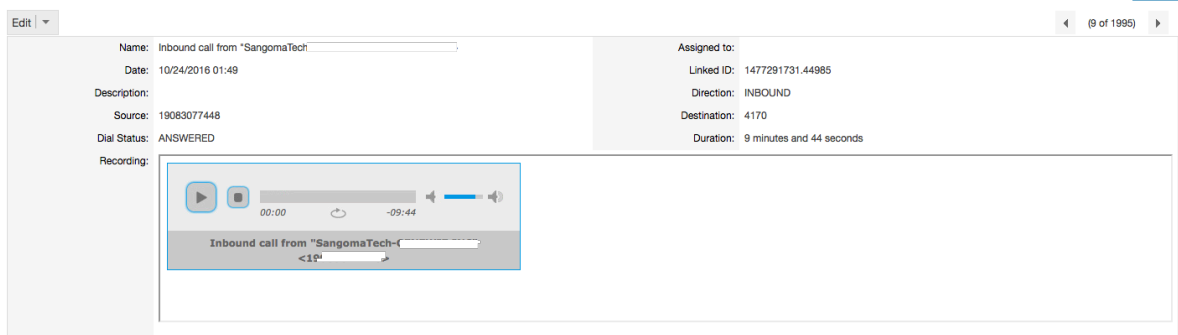
Name	Date	Direction	Dial Status	Source	Destination	Assigned to
Inbound call from "DID:WIRELESS CALLER" <1951234567890>	10/23/2016 20:24	INBOUND	ANSWERED	1951234567890	4020	
Inbound call from "WIRELESS CALLER" <1951234567890>	10/24/2016 08:03	INBOUND	MISSED	1951234567890	4161	Frederic Dickey
Inbound call from "DID:WIRELESS CALLER" <1951234567890>	10/24/2016 17:35	INBOUND	ANSWERED	1951234567890	4020	
Inbound call from "DID:WIRELESS CALLER" <1951234567890>	10/24/2016 17:59	INBOUND	ANSWERED	1951234567890	4020	

- Call Recording
 - If a call is recorded on the PBX a link to listen to the Call Recording will also be displayed in the Call History.
 - Optionally have all Call Recordings sent to the CRM for storage and ability to play the Call Recording from the CRM even after the Call Recording has been deleted from the PBX.
 - Connectwise CRM does not currently support the upload of call recordings as of Nov. 13, 2019.



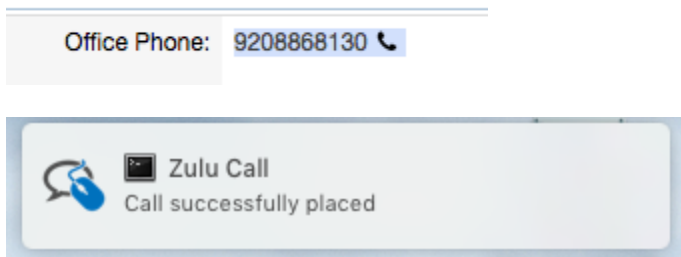
- Voicemail

- Option to enable having voicemails sent to the CRM for storage and linked to Call History with ability to listen to the voicemail in the call history.
- Upload of voicemails to Connectwise CRM is not currently supported as of Nov. 13, 2019.



- Click to Call

- With the purchase of the Zulu UC plugin you can click to call any phone number from within your CRM



- Call Popup on inbound Calls

- With the purchase of the Zulu UC plugin you can have inbound calls do a URL lookup in the CRM to any phone number.
- If a match is found for Accounts, Contacts or Leads they will be shown.
- Ability to create new Accounts, Contacts or Leads at anytime from the Call Popup results.

Edit | ▾

Name:	Inbound call from "WIRELESS CALLER" < >	Assigned to:	Frederic Dickey
Date:	10/24/2016 08:03	Linked ID:	1477314184.46149
Description:		Direction:	INBOUND
Source:	1	Destination:	4161
Dial Status:	MISSED	Duration:	0 seconds
Recording:	No Recording Files Found		

All Sales Activities

Leads

Create | ▾ (0 - 0 of 0)

Name	Referred By	Lead Source	Office Phone	Email	Lead Source Description	Assigned User
No Data						

Contacts

Create | ▾ (1 - 1 of 1)

Name	Account Name	Email	Office Phone
Tony Lewis	Tony Lewis	@mail.com	82-.....

[edit](#) ▾

Calls

Create | ▾ (0 - 0 of 0)

Subject	Status	Contact	Start Date & Time	Assigned to
No Data				

Accounts

Create | ▾ (1 - 1 of 1)

Name	City	Billing Country	Phone
Tony Lewis	Neenah	United States	

[edit](#) ▾