

# CRM INTEGRATION

Communicator integration will use URL pop-up events in order to integrate with any 3rd party CRM systems. Depending on preferred settings, pop ups will be used for inbound and outbound calls once a call is answered or while a call is still ringing on a user's extension. Call logs will be uploaded to CRM.

|  | <i><b>Office</b></i> | <i><b>Business</b></i> | <i><b>Agent</b></i> | <i><b>Supervisor</b></i> |
|--|----------------------|------------------------|---------------------|--------------------------|
| <b>SugarCRM</b><br>Communicator offers full support for the SugarCRM, including Click-to-Dial and Call Recordings upload.  | Optional             | Optional               | Optional            | Optional                 |
| <b>Zoho Integration</b><br>with the Zoho CRM does not support Click-to-Dial nor Call Recordings uploads to the CRM.  | Optional             | Optional               | Optional            | Optional                 |
| <b>Salesforce</b><br>Integration with the Salesforce CRM supports the Click-to-dial and Call Recordings upload feature, however, while the Click-to-Dial works with the Classic interface, it is not supported in Lightning.   | Optional             | Optional               | Optional            | Optional                 |
| <b>Microsoft Dynamics</b><br>Integration with the Microsoft Dynamics does not support the Click-to-Dial feature. Additionally, in case a customer is not added in the CRM, the call recording will not be uploaded unless the agent creates a contact before the call is finished. | Optional             | Optional               | Optional            | Optional                 |
| <b>Bullhorn</b><br>Integration with the Bullhorn CRM supports Call Recordings upload but does not support the Click-to-Dial feature.   | Optional             | Optional               | Optional            | Optional                 |
| <b>Zendesk</b><br>Integration with the Zendesk CRM supports Call Recordings upload but does not support the Clickto-Dial feature.  | Optional             | Optional               | Optional            | Optional                 |
| <b>Vtiger</b><br>Integration with the Vtiger CRM supports Call Recordings upload but does not support the Call log when call starts feature.   | Optional             | Optional               | Optional            | Optional                 |
| <b>Pipedrive</b><br>Integration with the Pipedrive CRM supports Call Recordings upload but does not support the Call log when call starts feature.   | Optional             | Optional               | Optional            | Optional                 |
| <b>SuiteCRM</b><br>Integration with the Suite CRM supports Call Recordings upload but does not support the Call log when call starts feature.  | Optional             | Optional               | Optional            | Optional                 |

# CRM FEATURE COMPARISON

|   | <b>SugarCRM</b> | <b>Zoho</b> | <b>Salesforce</b>              | <b>MS Dynamics</b> |
|---|-----------------|-------------|--------------------------------|--------------------|
| Fetch Customers and search by Caller ID                                     | <b>X</b>        | <b>Y</b>    | <b>Y</b>                       | <b>Y</b>           |
| Create a Call Log   | <b>Y</b>        | <b>Y</b>    | <b>Y</b>                       | <b>Y</b>           |
| Create a call log when starts call (v5)                                     | <b>X</b>        | <b>X</b>    | <b>Y</b>                       | <b>X</b>           |
| Upload Call Recordings  | <b>Y</b>        | <b>Y</b>    | <b>Y</b>                       | <b>Y</b>           |
| Open the customer detail page if a customer is found (call popup)           | <b>Y</b>        | <b>Y</b>    | <b>Y</b>                       | <b>Y</b>           |
| Open the "create new lead" page if a customer isn't found                   | <b>Y</b>        | <b>Y</b>    | <b>Y</b>                       | <b>Y</b>           |
| Option to enter default URL to open on queues                               | <b>Y</b>        | <b>Y</b>    | <b>Y</b>                       | <b>Y</b>           |
| Fill a Phone number with a caller ID when opening a page in situation above | <b>X</b>        | <b>X</b>    | <b>Y</b>                       | <b>X</b>           |
| Direct Contact Dial (COMMUNICATOR)  | <b>Y</b>        | <b>Y</b>    | <b>Y</b>                       | <b>Y</b>           |
| Click-to-dial (browser)   | <b>Y</b>        | <b>X</b>    | <i>Salesforce Classic Only</i> | <b>X</b>           |

|   | <b>Zendesk</b> | <b>Bullhorn</b> | <b>Vtiger</b> | <b>Pipedrive</b> | <b>SuiteCRM</b> |
|---|----------------|-----------------|---------------|------------------|-----------------|
| Fetch Customers and search by Caller ID                                     | <b>Y</b>       | <b>Y</b>        | <b>Y</b>      | <b>Y</b>         | <b>Y</b>        |
| Create a Call Log   | <b>Y</b>       | <b>Y</b>        | <b>Y</b>      | <b>Y</b>         | <b>Y</b>        |
| Create a call log when starts call (v5)                                     | <b>X</b>       | <b>X</b>        | <b>X</b>      | <b>X</b>         | <b>X</b>        |
| Upload Call Recordings  | <b>Y</b>       | <b>Y</b>        | <b>Y</b>      | <b>Y</b>         | <b>Y</b>        |
| Open the customer detail page if a customer is found (call popup)           | <b>Y</b>       | <b>Y</b>        | <b>Y</b>      | <b>Y</b>         | <b>Y</b>        |
| Open the "create new lead" page if a customer isn't found                   | <b>Y</b>       | <b>Y</b>        | <b>Y</b>      | <b>X</b>         | <b>Y</b>        |
| Option to enter default URL to open on queues                               | <b>Y</b>       | <b>Y</b>        | <b>Y</b>      | <b>Y</b>         | <b>Y</b>        |
| Fill a Phone number with a caller ID when opening a page in situation above | <b>X</b>       | <b>Y</b>        | <b>Y</b>      | <b>X</b>         | <b>Y</b>        |
| Direct Contact Dial (COMMUNICATOR)  | <b>Y</b>       | <b>Y</b>        | <b>Y</b>      | <b>Y</b>         | <b>Y</b>        |
| Click-to-dial (browser)   | <b>X</b>       | <b>X</b>        | <b>Y</b>      | <b>Y</b>         | <b>Y</b>        |