

# Integrations

Our UCaaS platform always plays well with others – Enjoy integration with leading CRM platforms, industry-specific management systems, and others.

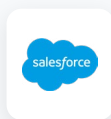




# CRM integrations

If you operate a business with a Customer Relationship Management (CRM) system, it's likely that this solution sits at the heart of your day to day operations, helping sales, support, and marketing teams function efficiently.

Our UCaaS platform operates with leading CRM solutions including Salesforce, HubSpot, and Pipedrive. Learn more about each integration.



**Salesforce**  
CRM

The screenshot displays the Salesforce CRM interface. At the top, there's a navigation bar with tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, and More. Below this, the 'Contacts' section is active, showing a list of 22 items. The list is sorted by Name and filtered by all contacts. The table below represents the data shown in the screenshot.

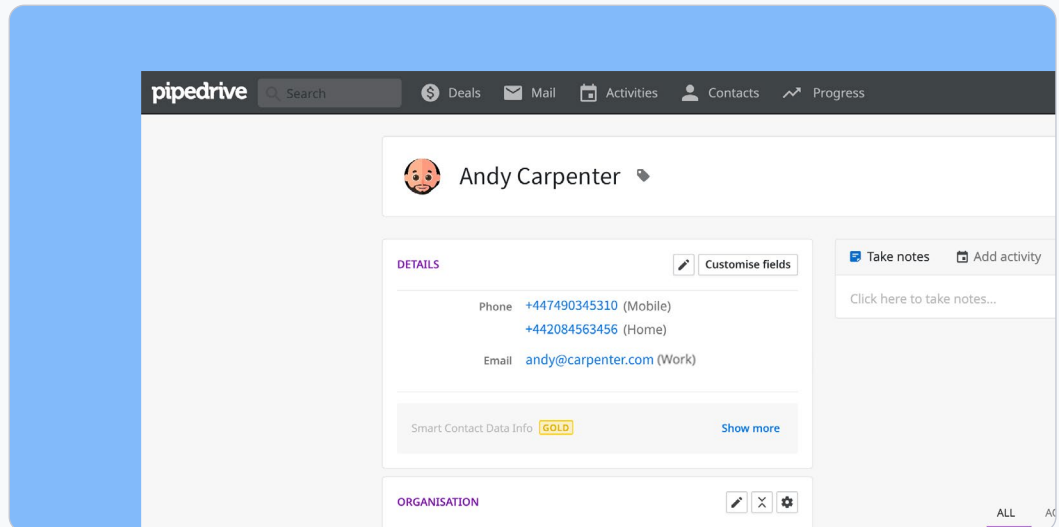
	NAME ↑	ACCOUNT NAME	TITLE	PHONE	EMAIL
1	<input type="checkbox"/> Andy Young	Dickenson plc	SVP, Operations	(785) 241-6200	<a href="mailto:a_young@dickenson.com">a_young@dickenson.com</a>
2	<input type="checkbox"/> Arthur Song	United Oil & Gas Corp.	CEO	(212) 842-5500	<a href="mailto:asong@uog.com">asong@uog.com</a>
3	<input type="checkbox"/> Ashley James	United Oil & Gas, UK	VP, Finance	+44 191 4956203	<a href="mailto:ajames@uog.com">ajames@uog.com</a>
4	<input type="checkbox"/> Avi Green	United Oil & Gas Corp.	CFO	(212) 842-5500	<a href="mailto:agreen@uog.com">agreen@uog.com</a>
5	<input type="checkbox"/> Babara Levy	Express Logistics and Transport	SVP, Operations	(503) 421-7800	<a href="mailto:b.levy@expressl&amp;t.net">b.levy@expressl&amp;t.net</a>
6	<input type="checkbox"/> Edna Frank	GenePoint	VP, Technology	(650) 867-3450	<a href="mailto:efrank@genepoint.com">efrank@genepoint.com</a>
7	<input type="checkbox"/> Jack Rogers	Burlington Textiles Corp of A...	VP, Facilities	(336) 222-7000	<a href="mailto:jrogers@burlington.com">jrogers@burlington.com</a>
8	<input type="checkbox"/> Jake Llorac	sForce			
9	<input type="checkbox"/> Jane Grey	University of Arizona	Dean of Administration	(520) 773-9050	<a href="mailto:jane_gray@uoa.edu">jane_gray@uoa.edu</a>

Enhance your CRM environment to drive productivity in your sales and marketing teams by streamlining their workflows using our integration for Salesforce.

- Click-to-dial browser extension: Place calls from within Salesforce by clicking on any phone number, saving time and improving call efficiency.
- Instant screen-pop: Incoming calls trigger screen pops with customer information at hand, enabling quality interactions.
- Call logs: Log details of all calls within Salesforce, including voicemails, call-recordings alongside your customer notes.
- Contact sync: Synchronised contact information across CRM and UC platforms.

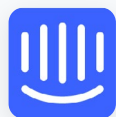


**Pipedrive**  
CRM



Our integration to Pipedrive is seamless and simple to set up. Increase your efficiency and productivity via a host of features including:

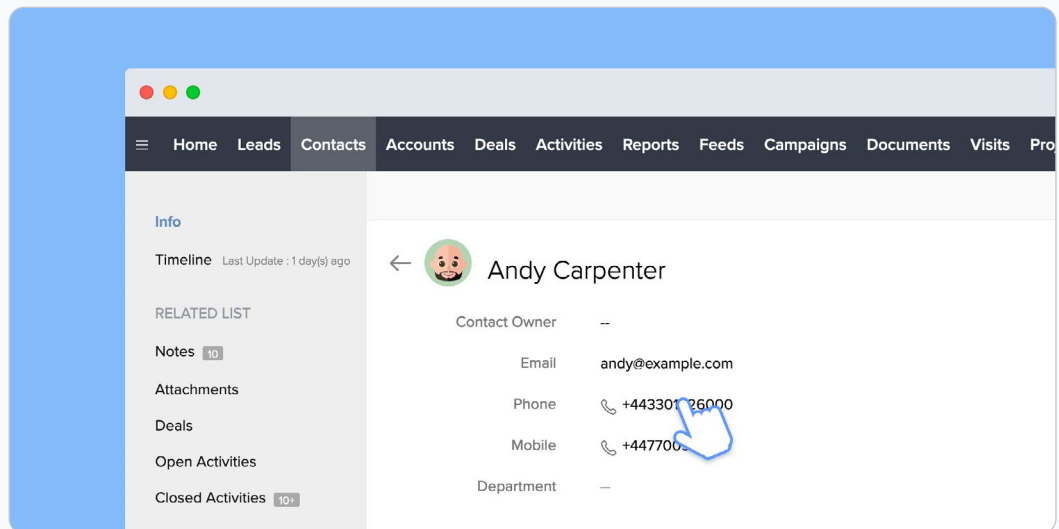
- Click-to-dial functionality for on-screen phone numbers.
- Contact syncing, with instant caller identification.
- Automatically updated call-logs, with voicemails and call recordings as easy-to-reach notes in Pipedrive.
- Call recordings and voicemail transcription.



**Intercom**  
CRM

Combine the Intercom app with the our UCaaS platform and make it easier for your teams to support and engage with your customers. Gain call logging functionality, contact recognition, call recordings and more.

- **Call Logging:** View call and contact details within Intercom alongside helpful notes and access to important call recordings.
- **Contact Sync:** Sync your phone system and Intercom contact information to make reaching customers easier than ever before.
- **Easy Click-to-Dial:** Speed up customer communication when you turn all onscreen phone numbers into clickable links.



Enjoy seamless integration with our business phone system and Zoho CRM, with features such as:

- Contact synchronisation for improved client information management.
- Call recordings, voicemail and automatic call activity logging.
- Click-to-dial that saves time spent manually dialling phone numbers.

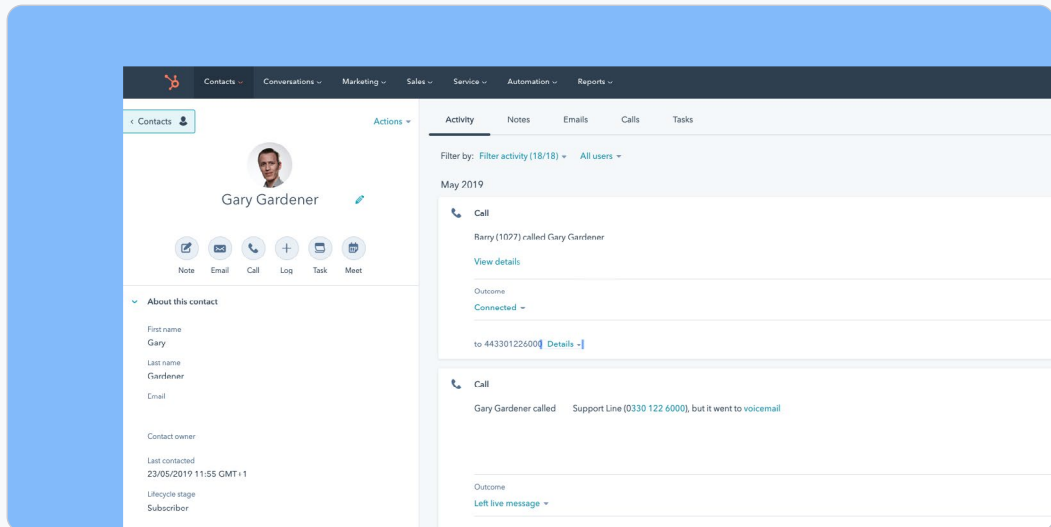


For businesses using Vtiger CRM to align customer information for marketing, sales and support teams, enhance your solution further with our seamless out-the-box integration.

- Your CRM holds all the contact information your teams need – sync this with your phone system to further unify your records.
- Help inbound teams deliver the best possible service to customers with screen-pop functionality that puts a customer-centric view at their fingertips.
- Log all data pertaining to call records, with voicemails and call recordings stored.
- Turn every number held within Vtiger into a clickable link with our click-to-dial browser extension.



HubSpot  
CRM



Integrate our UCaaS platform with HubSpot and expand the functionality of your CRM software, helping you focus your sales and marketing efforts.

- Instant inbound call recognition for improved CX.
- Contact synchronisation between CRM and phone system records – keeping your top leads within easy reach.
- Click-to-dial phone numbers displayed in browsers improves outbound efficiency.
- Comprehensive call logging.



Capsule  
CRM

Enhance Capsule CRM with our powerful phone system integration. Get instant click-to-dial, auto activity logging, call recording, contact integration and a host of call features.

- Streamline your workflow by making all phone numbers instantly available through click-to-dial.
- Automatically sync your Capsule CRM contacts, so your hottest contacts and most important clients are easily reachable.
- See call activity without having to leave your Capsule CRM dashboard, with logs including call durations and call times.
- Benefit from voicemail to email, transcriptions and call recordings.



**Vincere**  
CRM

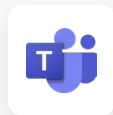
Vincere is the CRM of choice for recruitment and staffing agencies who rely on real-time interaction with clients, candidates, and prospects.

Our UCaaS platform integrates seamlessly with Vincere to enhance their capabilities by offering advanced call logging and contact management, and allowing for click-to-dial within the Vincere web-application.

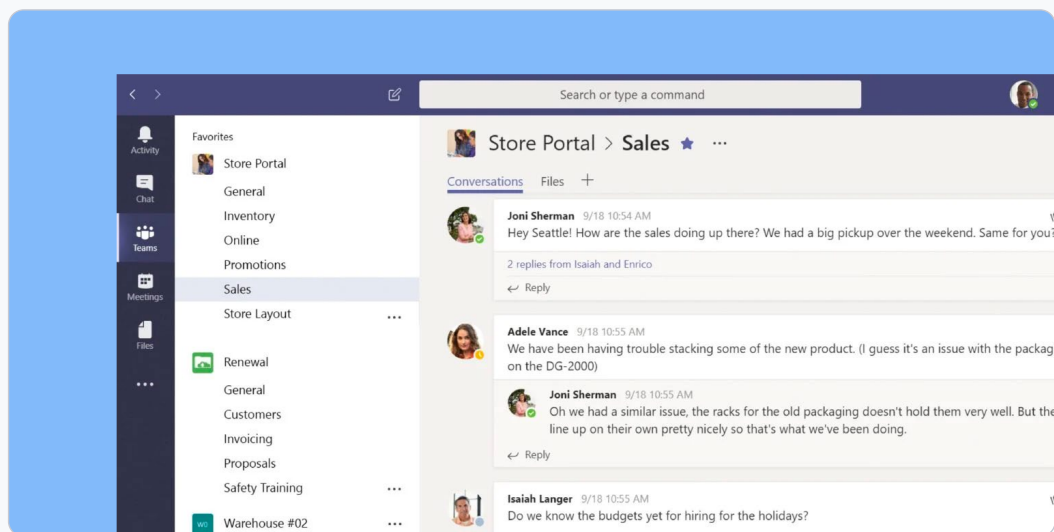
- Log calls within your contact profile in Vincere to ensure a historical record of interactions.
- Sync your phone and CRM address books to ensure accurate information.
- Turn any phone number in Vincere into an instantly dialable link to save agents time.



# Business communications & productivity



## Microsoft Teams Productivity

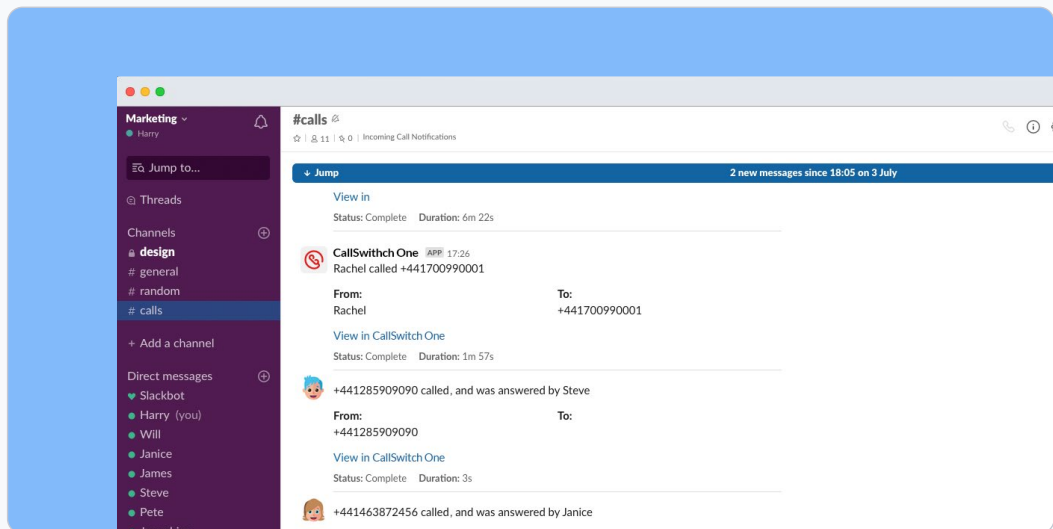


Our UCaaS platform offers a deep integration with Microsoft Teams, providing an enhanced voice solution for your Microsoft Teams users, allowing them to benefit from our phone system features without leaving their Teams application.

- Use Teams desktop and mobile applications to make and receive voice calls, while making use of our advanced call routing, hunt groups, call queues, and native call recording and CRM integrations.
- Make use of the inclusive call bundles that come with each of our UCaaS licences.
- Enjoy enterprise grade security and resilience from our purpose-built voice infrastructure.
- Offer genuine endpoint flexibility by having Microsoft Teams users sit within your UCaaS solution seamlessly alongside users who prefer to make use of our proprietary applications.



Slack  
Productivity

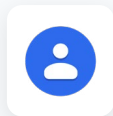


For businesses who already make use of the Slack messaging and file-sharing solution, leverage our integration to enhance Slack while improving team productivity and efficiency.

- Receive call activity notifications in your Slack channel of choice. View incoming calls, call duration, see active calls and even see if you've missed any calls.
- See when contacts are trying to get in touch with you, your department or office, including internal calls between your teams.
- Easily access your call recordings and receive instant notifications to your chosen Slack channel, including personal or team channels.

# Phonebook integrations

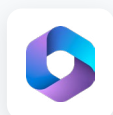
If your business is using a Cloud Office suite that includes contact directory functionality, it's vital that your contact information is kept centrally, up-to-date, and can be treated as a single source of truth – which is why our UCaaS platform offers integration to leading contact directory software providers.



## Google Contacts Phonebook

With Google Contacts integrated with your UCaaS solution, you can ensure your contact list is fully synchronised across all users and devices.

- Easily identify inbound calls from your most important customers, clients and opportunities.
- Automatically synchronise your Google Contacts so they're available to your phone system, for seamless and direct calling.
- Your Google Contacts are accessible to you via your chosen device, from smartphones to desk-phones, laptops to desktop computers.



## Microsoft 365 Phonebook

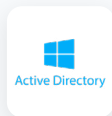
Our integration with Microsoft 365 is an effective and efficient way to integrate your business contacts with your unified communications system. Enhance customer experience by helping your agents identify callers instantly and offer a more personalised service.

- Instantly view your Microsoft 365 contact details, the moment they call your business phone number and offer a tailored experience.
- Automatically synchronise Microsoft 365 contacts with your phone system. Your most important contacts are visible for outbound calls.
- Make your Microsoft 365 contacts accessible to you via the device of your choice, from mobile device to desk-phones, laptops to desktop.

# Single sign-on (SSO) support

Single sign-on (SSO) is an identification method that enables users to log in to multiple applications and websites with one set of credentials, streamlining the authentication process for users.

Our UCaaS platform offers SSO functionality for leading cloud office providers, Microsoft and Google.



## Microsoft Active Directory

Single sign-on

Businesses making use of Microsoft Active Directory as part of their Microsoft software suite can now benefit from SSO support with our UCaaS platform, meaning additional security for CallSwitch One dashboards and streamlined logins for employees.

- Synchronise an active list of UCaaS solution users within Microsoft Active Directory, alongside their login credentials.
- Enforce business security protocols including multi-factor authentication when logging into your business communications dashboard.
- Allow users to login via any of our Apps, on their preferred device, from wherever they are working – without the need for additional passwords.



## Google Workspace

Single sign-on

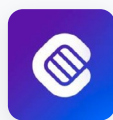
Our UCaaS platform offers SSO support for Google Workspace, so organisations placing Google at the heart of their day-to-day business operations can support employees with streamlined and secure login to their dashboards.

- Store your list of UCaaS solution users and extensions within Google Workspace to align them with their Google login credentials.
- Allow users to login using their Google credentials via any of our Apps, on their preferred device, from wherever they are working.
- Protect your business communications dashboard with your Google security protocols, including features such as multi-factor authentication.

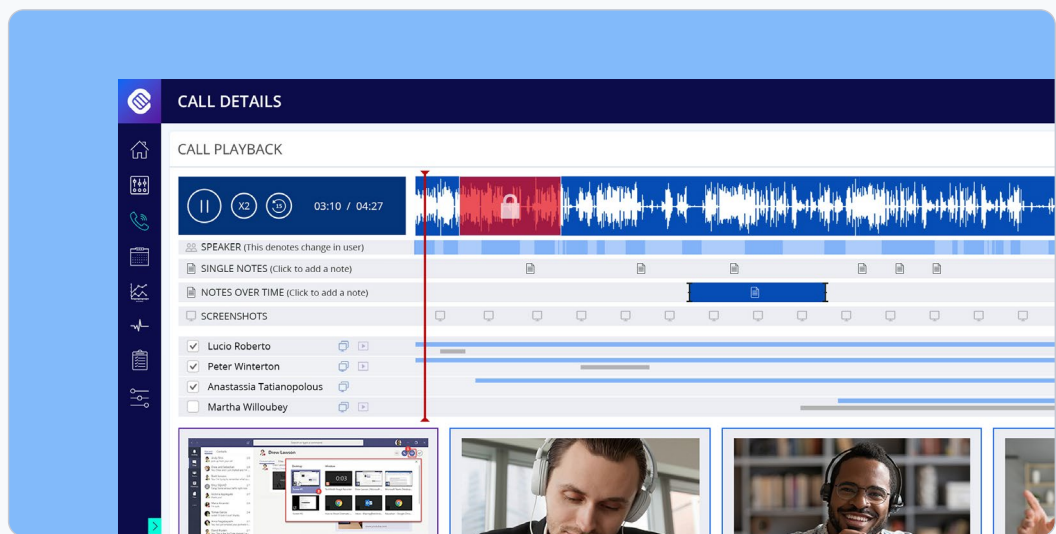
# Call recording

Our UCaaS platform includes native cloud-based call recording, offering a 90-day rolling archive of calls, complete with secure data centre storage, as well as integration with leading cloud storage providers should you need to retain copies of their recordings longer term.

For customers operating in regulated industries and subject to compliance requirements, such as MiFID II or PCI-DSS, we offer plug-and-play integration with cloud-based call recording solution, CallCabinet, our preferred and approved compliance software partner.



**CallCabinet**  
Call recording



CallCabinet delivers the ultimate telephony compliance and analytics suite, including:

- Advanced search and retrieval.
- 256-bit encryption.
- Long-term immutable, geo-redundant storage.
- Payment platform integration with PCI redaction for CNP card payments.
- Comprehensive voice and speech analytics with actionable reporting and insights.

# Cloud storage

Our UCaaS platform offers 90-day rolling storage for the native call recording feature included with the solution. We also offer an easy to setup integration with the leading cloud storage providers: Amazon S3, Microsoft Azure, Google Drive, and Dropbox.

This enables call recordings to be backed up automatically, for longer durations, or with additional geo-redundancy if required for compliance.

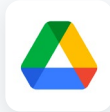
Call Detail Record (CDR) data can also be automatically backed up for businesses to retain a copy of their communications history.



**Amazon S3**  
Cloud storage



**Azure**  
Cloud storage



**Google Drive**  
Cloud storage



**Dropbox**  
Cloud storage

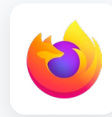
# Browser extensions

Our UCaaS platform includes easy to setup browser extensions for Google Chrome and Mozilla Firefox that allow you to extend phone system features directly into your chosen browser, increasing productivity and efficiency.

- Turn all on-screen phone numbers into clickable links. No additional hardware needed.
- Make calls from directly within the browser window without opening your UCaaS application.
- Works across all web pages – from your favourite CRM solution, to a website you're visiting.
- Change Caller IDs within the Firefox browser and call clients or leads from the phone number of your choosing.



**Chrome**  
Browser Extension



**Firefox**  
Browser Extension

# Open API & webhook library

Unlock the ultimate integration toolkit, with our comprehensive Open-API and webhook library, allowing you to build bespoke features, integrations, or simply tweak existing UCaaS features to support specific requirements.

Easily extract call data to build customised wallboards, incorporate routing from our cloud-PBX into existing applications, or build your own applications and services from scratch – your imagination is the only limitation.

Just some of the API commands available within the platform: Manage audio files and Music on Hold playlists

- Set call routing and call forwarding for your phone numbers.
- Schedule operating hours for numbers.
- View call costs, call recordings and CDR data.
- Manage short codes that work with your VoIP phone devices.
- View caller identification and make requests for alternative caller IDs.
- Add and manage SIP trunks to connect your UCaaS solution to any platform.
- Create Wallboards for users aggregated as daily, weekly or monthly statistics.
- View provisioned VoIP phone devices on your account.
- Create queue groups, request stats such as people in queue or average wait time..
- Store contacts and their phone numbers/email addresses.
- Create, view and manage speed dials.
- Send and receive SMS messages from your numbers.

**Invoices**  
Details of orders placed by the customer on the storefront

All GET PUT POST DELETE \*Chargable \*You will be charged every time this command is run

**GET/account/invoice**  
Gets a list of all invoices for the specified customer

**GET/account/invoice/{uuid}/pdf**  
Gets the PDF data

**Request Details**

POST body

Name	Value
contact_first_name	
contact_last_name	
created_on	
role_id	

**Example**

```
1 {
2   "result": {
3     "call_flow": "b6493b1a-b70c-428f-ad55-f9197fec8e01",
4     "can_invite_anonymously": true,
5     "country_code": "44",
6     "created_on": "2023-02-08",
7     "emergency_address": "b6493b1a-b70c-428f-ad55-f9197fec8e01",
8     "name": "Pete's Direct Dial",
9     "number": "505505",
10    "number_address": "b6493b1a-b70c-428f-ad55-f9197fec8e01",
11    "out_of_hours": "026fc253-d2d2-4c66-8275-235618de2bf6",
12  },
13  "status_code": 200,
14  "status_message": "OK"
15 }
```

```
1 {
2   "result": {
3     "contact_first_name": "Pete",
4     "contact_last_name": "Plumber",
5     "created_on": "2023-02-23",
6     "role_id": true,
7     "updated_on": "2023-02-23",
8     "uuid": "b6493b1a-b70c-428f-ad55-f9197fec8e01"
9   }
10 }
```





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