

CRM Enhancement to search Caller ID

Last Modified on 01/21/2024 6:14 am EST

Feature first available:

iPECS Cloud version 6.0.

License Required:

iPECS Cloud CRM licensing is required to use this feature.

Description:

There is now an option for a CRM Pop-Up to search CID. This option is available on the Ring/Ringback interface, as well as the Answered interface (to show CID when the call is transferred to another extension).

Programming:

The image illustrates the configuration and user experience for the CRM pop-up feature. On the left, the 'Settings' window shows the 'CRM' section with the following options:

- Use CRM Integration:
- Use CRM Pop-up: Ringing/ Ringback Answered
- Minimum number length for CRM search: 4
- Use Call Log Sync:
- Salesforce CRM:

On the right, two screenshots show the call interface. The top screenshot shows a 'Missed Calls' screen with a 'Show CRM Contact' button highlighted by a dashed orange box. The bottom screenshot shows a 'Connected' call screen with a 'Show CRM Contact' button highlighted by a dashed orange box. Dashed orange arrows point from the 'Show CRM Contact' buttons in the call interface to the corresponding settings in the 'Settings' window.

CRM contact popups When call is ringing or ring-back

CRM contact popups When call is answered