Quick Starter Guide

CRM Integrations

Powered by CallTower

CRM Integration

Unite for Teams CallTower provides integration to a wide range of different CRM and Contact orientated Business Applications. Integration provides a range of set integration features from the list below. Up to four Add-ins can be concurrently configured.

Caller Preview

Displays the caller's name in the Call Preview window when a match is found between the caller's number and the contact information stored in an integrated application.

(Add new)

Integration

(Please select)
- Cloud Contacts
- Directory
- Google Contacts
- HubSpot
- Maximizer CRM
- Microsoft Access
- Microsoft Dynamics 365 CRM
- Microsoft Outlook
- NetSuite
- Outlook Web Access
- Salesforce
- SugarCRM
- Zendesk
- Zoho CRM
- 4me
- Act! 2010+
- Act! Premium Cloud / Web
- AGGSmart
- Arbor Education
- Athena Health
- Autotask
- Bitrix24
- Bond AdaptUX OnDemand
- BOSYS

Contact Popping

Instantly open the caller's contact record in the integrated application by clicking the application's icon in the Caller Preview window.

Adding a contact

Instantly add and edit a new contact record in the integrated application by clicking the New Contact button in the Address Book.

Contact Searching

Enables you to concurrently search all configured integrations and pop the contact record or click to-dial from the results.

Activity Logging

Manually or Automatically create a history (Activity) log of a call received within the Business (CRM) Application/s and add notes.

To set up an integration just select the "(Add new)" from the Configuration page and select an Application and click Set. To get help on setting up the integration just click on the blue help circle.