



# CRM applications for integration with Cloud Phone

Manufacturer	Application Name & Version	Notes
1-2 Mobile Limited	ServiceMax	
ACA Systems	WinSIMS	
Autotask Corp	Autotask (PSA) 2017.1	Autotask users will require API to be enabled. Please be aware that Autotask has an API Call Threshold which may affect the integration. Please contact Autotask for details of the API Call Threshold.
Carerix bv	Carerix	Will require the Carerix API and telephony to be enabled by Carerix.
Chittak Ltd	TITAN	
ConnectWise	ConnectWise Manage – 2018.2	Screen popping will only pop the web page.
	ConnectWise Manage – 2018.1	Screen popping will only pop the web page.
	ConnectWise Manage – 2017.6	Screen popping will only pop the web page.
	ConnectWise Manage – 2017.5	Screen popping will only pop the web page.
	ConnectWise Manage – 2017.3	Screen popping will only pop the web page.
	ConnectWise Manage – 2017.1	Screen popping will only pop the web page.
	ConnectWise Manage - 2016.6	Screen popping will only pop the web page.
	ConnectWise PSA - 2016.5	Screen popping will only pop the web page.
	ConnectWise PSA - 2016.2	Screen popping will only pop the web page.

	ConnectWise PSA - 2016.1	Screen popping will only pop the web page.
	ConnectWise PSA - 2015.1	Screen popping will only pop the web page.
	ConnectWise PSA - 2014.4	Screen popping will only pop the web page.
	ConnectWise PSA - 2011.2 - 2013.1	Screen popping will only pop the web page.
CPL Software	RPM (version 2.21)	Will require CPL Software to be installed prior to the installation.
DATEV	DATEV	
Dezrez	Dezrez	Must have direct involvement of Dezrez. Additional charges from Dezrez will apply.
	Rezi	Must have direct involvement of Dezrez. Additional charges from Dezrez will apply.
Estates IT Ltd	PCHomes 6.5	Estates IT will need to set up an ODBC connection
Frontrange	Goldmine - 5.5 - 9.2	To be able to use the dial button user needs to have master rights in Goldmine.
	Goldmine - 2014 (Premium)	To be able to use the dial button user needs to have master rights in Goldmine.
	Goldmine - 2013	To be able to use the dial button user needs to have master rights in Goldmine.
Google	Contacts	Dialling supported on Google Chrome only, and requires the Telephone Number Detection extension to be installed and enabled.
HEAT Software	Goldmine - 2016	To be able to use the dial button user needs to have master rights in Goldmine.
IBM	IBM Notes - 9.0	
	Lotus Notes - 7 - 8.5	
Ivanti	Goldmine 2017.1	To be able to use the dial button user needs to have master rights in Goldmine.

Infor	InforCRM (Saleslogix) v8	Only LAN version is supported. Web version not supported.
Maximizer Software Inc.	Maximizer - Cloud Versions 2012, 2015, 2015 R2	For Cloud based versions - will need Web Access / API (Also known as Maximizer.Web.Data) configured and enabled in Maximizer. Also for Cloud versions, screen popping will pop in Internet Explorer browser only.
	Maximizer - 9 - 12	
	Maximizer CRM (Web Access) – 2016 & 2017	For Cloud based versions - will need Web Access / API (Also known as Maximizer.Web.Data) configured and enabled in Maximizer. Also for Cloud versions, screen popping will pop in Internet Explorer browser only.
Microsoft	Access – 2013, 2016, Office 365	
	Access - 2000 - 2010	
	Dynamics 365 For Sales 8 & 9	Supported using the log in method for Microsoft Dynamics 'Use online federation (Office 365)'. Win XP not supported. When using Google Chrome Dialling, clicking a telephone number in MS DYNAMICS CRM, the number will be dialled however a new, blank tab may open within Chrome as well.
	Dynamics CRM - 3, 4	For Office 365: Requires .net4 and Windows Identity Framework. Win XP not supported.
	Dynamics CRM - 2016	For Office 365: Requires .net4 and Windows Identity Framework. Win XP not supported. When using Google Chrome Dialling, clicking a telephone number in MS DYNAMICS CRM, the number will be dialled however a new, blank tab may open within Chrome as well.
	Dynamics CRM - 2015	For Office 365: Requires .net4 and Windows Identity Framework. Win XP not supported.
	Dynamics CRM - 2011, 2013, Office 365	Supported using the log in method for Microsoft Dynamics 'Use online federation (Office 365)'. Win XP not supported. When using Google Chrome Dialling, clicking a telephone number in MS DYNAMICS CRM, the number will be dialled however a new, blank tab may open within Chrome as well.

Dynamics NAV - 4.0 - 5 (SQL Database)	Only MS SQL databases are supported.
Dynamics NAV - 4.0 - 5 (CLASSIC Database)	The Microsoft Dynamics NAV Classic version will require 2 Microsoft Dynamics NAV Classic licenses from Microsoft per user requiring the Dynamics NAV Classic integration.
Dynamics NAV - 2017 (SQL Database)	Only MS SQL databases are supported.
Dynamics NAV - 2017 (CLASSIC Database)	The Microsoft Dynamics NAV Classic version will require 2 Microsoft Dynamics NAV Classic licenses from Microsoft per user requiring the Dynamics NAV Classic integration.
Dynamics NAV - 2016 (SQL Database)	Only MS SQL databases are supported.
Dynamics NAV - 2015 (SQL Database)	Only MS SQL databases are supported.
Dynamics NAV - 2013 R2 (SQL Database)	Only MS SQL databases are supported.
Dynamics NAV - 2013 R2 (CLASSIC Database)	The Microsoft Dynamics NAV Classic version will require 2 Microsoft Dynamics NAV Classic licenses from Microsoft per user requiring the Dynamics NAV Classic integration.
Dynamics NAV - 2013 (SQL Database)	Only MS SQL databases are supported.
Dynamics NAV - 2013 (CLASSIC Database)	The Microsoft Dynamics NAV Classic version will require 2 Microsoft Dynamics NAV Classic licenses from Microsoft per user requiring the Dynamics NAV Classic integration.
Dynamics NAV - 2009 R2 (SQL Database)	Screen popping will only pop the client. Only MS SQL databases are supported.
Dynamics NAV - 2009 R2 (CLASSIC Database)	The Microsoft Dynamics NAV Classic version will require 2 Microsoft Dynamics NAV Classic licenses from Microsoft per user requiring the Dynamics NAV Classic integration.
Dynamics NAV - 2009 (SQL Database)	Screen popping will only pop the client. Only MS SQL databases are supported.
Dynamics NAV - 2009 (CLASSIC Database)	The Microsoft Dynamics NAV Classic version will require 2 Microsoft Dynamics NAV Classic licenses from

		Microsoft per user requiring the Dynamics NAV Classic integration.
	Outlook – 2016, Office 365	Integration is only supported with the fully installed Outlook client and not the OWA client
	Outlook 32 bit - 2013, Office 365	Integration is only supported with the fully installed Outlook client and not the OWA client
	Outlook 32 bit - 2000 - 2010	Integration is only supported with the fully installed Outlook client and not the OWA client
	Outlook 64 bit - 2013, Office 365	Integration is only supported with the fully installed Outlook client and not the OWA client
	Outlook 64 bit - 2010	Integration is only supported with the fully installed Outlook client and not the OWA client
NetSuite Inc.	Netsuite CRM – 2017	
	Netsuite CRM – 2016	
	Netsuite CRM - 2015	
	Netsuite CRM - 2013	
	Netsuite CRM - 2010 - 2012	
PerfectView CRM	PerfectView Online CRM (PVCRM)	International numbers are not currently supported.
SAGE	50c (50 Accounts) 2017(v23), 2018(v24)	
	50 Accounts – 2016 (V22)	
	50 Accounts – 2015	
	50 Complete Accounting – 2014	
	50 Complete Accounting – 2012, 2013	
	ACT! Professional – 2013	
	ACT! Professional – 2010 – 2012	
	ACT! Professional – 2008 – 2009	
	Line 50 Accounts – 2014	
	Line 50 Accounts – 2008 – 2013	

	Sage 200 with Sage CRM module	We find most customers who have Sage 200 also have the Sage CRM module. We integrate with the Sage CRM module and NOT directly with Sage 200. Please check the Sage CRM versions supported for more details.
	Sage CRM / MME – 7.3	
	Sage CRM / MME – 7.2, 2013	
	Sage CRM / MME – 7.0, 7.1	
	Sage CRM / MME – 2014 (Professional, On-Premise Editions)	
	Sage Saleslogix – 7.2 – 7.5	Only LAN version is supported. Web version not supported.
Salesforce.com Inc.	SalesforceCRM (Classic Add-in) – Enterprise (Classic and Lightning), Unlimited (Classic and Lightning), Performance Edition (Classic)	Integration with Professional Edition is supported when The Force.com SOAP API is enabled. IMPORTANT NOTICE: On July 22nd 2017 Salesforce are disabling support for support for TLS 1.0 and will only support TLS 1.1 and 1.2. It is recommended* that Version 2.6 is installed to work with these changes.* An upgrade to 2.6 can be avoided if an end-user's PC is configured to support TLS 1.2. This is a complex procedure but is an alternative should the customer not wish to upgrade to version 2.6. Please refer to <a href="https://help.salesforce.com/articleView?id=000221207&amp;type=1">https://help.salesforce.com/articleView?id=000221207&amp;type=1</a> , Section API (inbound) Integrations, .NET table, for Salesforce help articles on how this can be achieved.
	SalesforceCRM (Salesforce Adapter)	Not supported on Terminal Services environments. Requires Salesforce to be licensed for the Open CTI API. Software provides an embedded window in the upper left corner of the Salesforce Window. Features provided through this window are: caller preview, create new Salesforce entity, click to dial, write call record against entity, basic call control (answer, hold and hang up)
Salpo Technologies Ltd	Salpo CRM	
Stylite	EGroupware - 1.0 - 1.8	

Sugar CRM	Sugar CRM - 7.10	
	Sugar CRM - 7.9	
	Sugar CRM - 7.8	
	Sugar CRM - 7.7	
	Sugar CRM - 7.6	
	Sugar CRM - 7.2	
	Sugar CRM - 5.0 - 7.1	
SuperOffice	SuperOffice – 7.5	Only MS SQL databases are supported.
	SuperOffice - 6 - 7.1	Only MS SQL databases are supported.
Swiftpage	ACT! Premium – V20	
	ACT! Premium – V19	Provides the option to allow the user to choose which tab window is to be displayed on Screen Pop. Also provides the option to Screen Pop to either the 'New History' window or 'New Note' window within ACT!.
	ACT! Premium - V18	Provides the option to allow the user to choose which tab window is to be displayed on Screen Pop. Also provides the option to Screen Pop to either the 'New History' window or 'New Note' window within ACT!.
	ACT! Premium - V17	Provides the option to allow the user to choose which tab window is to be displayed on Screen Pop. Also provides the option to Screen Pop to either the 'New History' window or 'New Note' window within ACT!.
	ACT! Professional - V19	Provides the option to allow the user to choose which tab window is to be displayed on Screen Pop. Also provides the option to Screen Pop to either the 'New History' window or 'New Note' window within ACT!.
	ACT! Professional - V18	Provides the option to allow the user to choose which tab window is to be displayed on Screen Pop. Also provides the option to Screen Pop to either the 'New History' window or 'New Note' window within ACT!.
	ACT! Professional - V17	Provides the option to allow the user to choose which tab window is to be displayed on Screen Pop. Also provides

		the option to Screen Pop to either the 'New History' window or 'New Note' window within ACT!.
	ACT! Professional - V16	
	Infor CRM (Saleslogix) - 8	Only LAN version is supported. Web version not supported.
Tall Emu	Tall Emu Desktop (Add-in) – 2.6 (Classic Add-in)	
Teamleader	Teamleader	
vtiger.com	vtiger CRM - 7	
	vtiger CRM - 6	
	vtiger CRM - 4 - 5	
webCRM	webCRM (Plus or Enterprise)	Plus or Enterprise Version of webCRM required for integration
Workbooks	Workbooks	Recommended web browser to use - Chrome version 53.0.2785.89 or newer.
Zendesk	Zendesk	We would advise that phone numbers are stored within Zendesk without punctuation. The Zendesk API has limits (requests per minute) which is dependent upon the Edition of Zendesk. Therefore, on high usage sites it is recommended that the Zendesk add-in is configured to use 'Cache'.
Zoho Corp.	Zoho CRM (PhoneBridge) - Enterprise	Requires Zoho PhoneBridge API, please contact your Zoho maintainer for details  1. For any incoming call from or outgoing call to a CRM contact, a business card view of the contact in Zoho CRM is presented. 2. Calls made or received are automatically logged in Zoho CRM and can be viewed in the call logs. 3. Follow-up activities can be added at the end of every call from Zoho CRM
	Zoho CRM - Standard, Professional, Enterprise	The Zoho API has limits, as detailed here: <a href="https://www.zoho.com/crm/help/api/api-limits.html">https://www.zoho.com/crm/help/api/api-limits.html</a> Therefore, on high usage sites it is recommended that the Zoho addin is configured to use 'Cache'. For

		details of the Live searching limitations, please refer to the Zoho Addin Guide.
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