

Introduction

Integrating your telephone system with your CRM or business systems can provide significant productivity gains for your organization. With Go Integrator CRM Connector you can, for example, know who is calling and quickly get their details on the screen or simply click on their contact number to automatically make your handset dial the number. CRM Connector for BroadWorks can provide Application Integration through the following methods:

Add-in

An Add-in is a program that is written to link the CRM Connector client to a specific business application. The Add-in is included with and configured from within the Go Integrator CRM Connector client and provides a range of set integration features noted in the list below. Note: Up to four (4) Add-ins can be concurrently configured.

Caller Preview	Displays the caller's name in the Preview or Phone window when a match against it is found in the integrated business application(s). In addition, the CRM's Notes field is displayed, where available.
Contact Popping	Click the business application's icon in the Phone or Preview window and the caller's contact record is opened directly in the integrated business application.
Contact Searching	Concurrently searches the integrated business applications and enables Contact Popping or Click to Dial from the results.
Activity Logging	Manually or automatically creates an activity record of a call received within the integrated business application and allows addition of notes.
Click to Dial	Makes it possible to dial directly from the business application. The exact method varies between business applications.
Add Contact	Add a record to the integrated business application(s) directly from the client Address Book, Call History page or Preview Window

Add-in Classifications

Standard Integrations

Standard integrations are typically* available by default within the CRM Connector client and installation can be completed by the end user via the Add New section where a help guide is provided once a CRM selection is made. Standard integrations use open APIs or benefit from partner agreements with the business application developer and it is expected that support for future releases will be maintained.

Controlled Integrations

Controlled integrations have typically been provided on a customer project basis and either a limited agreement or no agreement is maintained with the application developer - and support for future releases might not be available. The integration add-in is not available by default within the CRM Connector client and must be enabled by the Go Integrator CRM Connector for BroadWorks developer at the time of installation. (This may require professional services and/or may require additional costs or limited/customized SLAs.)

Standard Pre-Release

Completed integrations not yet available in the current production release of the software. Please contact your supplier if you have an immediate need of this integration. These are BETA and may require additional costs or limited/customized SLAs.

Standard Select

The Standard-Select classification applies to Add-ins where additional conditions and costs must be met before installation can be undertaken. Installation can only be completed by an authorized installer (a Select Installer). Once installed, Standard-Select Add-ins benefit from the same levels of support as Standard Add-ins if the Service Provider has been made aware of the customizations and agrees to support the customizations.

Legacy

The Legacy classification applies to Add-ins for business applications where support has been discontinued by the CRM or CRM Connector application developer. An unlock code from MondaGo is required to configure the Add-in within the CRM Connector client and only a limited, **non-SLA** support level may be available from the developer. Discuss provider support levels and with provider.

TAPI

This method provides a TAPI driver that can connect to a TAPI compliant* application. With TAPI integration, the driver simply provides call information to the business application, and it is the business application that provides the integration features. It is advised that the business application provider is contacted to find out what integration features are supported.

Please note this doesn't mean it won't work with other TAPI compliant business applications and there is no restriction for trying it with these other applications.

*TAPI version 2.0 and 2.1.

SDK

The method uses a proprietary API available with CRM Connector for BroadWorks. With SDK integration the API simply provides call information to the application, and it is the application that provides the integration features. We would advise you contact the application provider to find out what integration features are supported.

Version 4.x+ CRM Integrations

Windows OS

Click on the links to go to the developer's site and review the current lists of Windows OS integration options along with more details:

[Standard Integrations](#)

[Standard Select Integrations](#)

[Standard Pre-Release Integrations](#)

[Controlled Integrations](#)

[Legacy Integrations](#)

MAC OS

Click on the links to go to the developers site and review the current lists of MAC OS integration options along with more details for each:

[Standard Integrations](#)

[Controlled Integrations](#)