

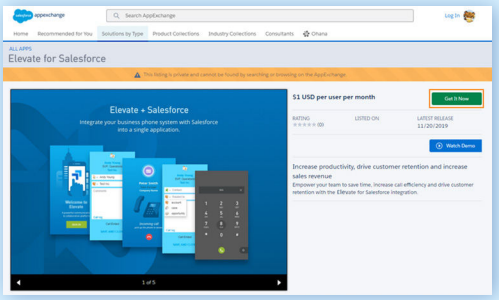
Elevate and Contact Center Integrations

Outstanding alone, even better together.

Boost productivity and strengthen customer connections with seamless communication tools that integrate directly into your everyday business applications. Whether using Elevate or Contact Center, each delivers powerful CRM and ERP integration features like click-to-dial, screen pops, and customer context, right where you work. When both solutions are used together, the experience becomes even more connected and efficient, helping teams collaborate and serve customers with greater ease. For organizations seeking vertical-specific functionality, we also offer tailored integrations designed for key industries.

SALESFORCE INTEGRATION

ELEVATE	CONTACT CENTER
• Click-to-call, answer call, and hang up the call from the embedded Lightning app • Screen pop with caller details • Capture call recordings and automatically store them • Efficiently log call notes to the customer record during or after calls • Seamlessly view case status based on caller ID for faster context • View open cases within seconds	• Record-specific screen pops with options for additional context • Track outbound calling • Capture audio recordings and automatically store them in the account record • Access case status, or build self-serve call flows for customers with speak-back • Sort and prioritize incoming inquiries based on case status • Create leads from IVR flow

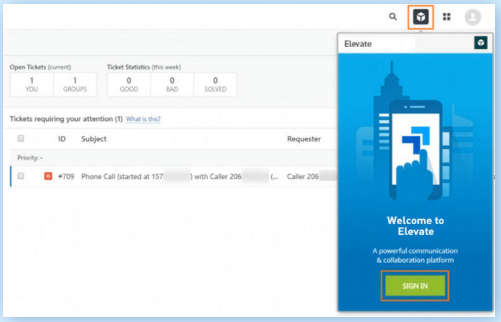


ELEVATE	CONTACT CENTER

ZENDESK INTEGRATION

- Click-to-call from within Zendesk
- Screen pop with caller details
- Capture call recordings and automatically store them
- Seamlessly view ticket status based on caller ID for faster context
- View open tickets or create new support tickets for customers

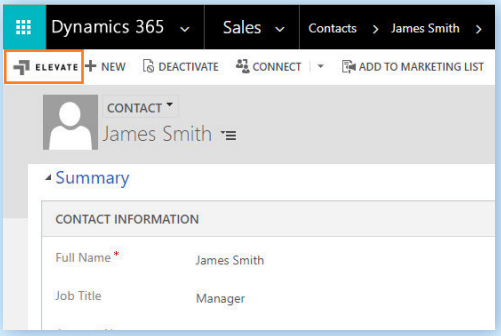
- Screen pop with options for additional context
- Track outbound calling
- Capture recordings and automatically store them in the account record
- Access ticket status manually, or build self-serve call flows for customers with ticket creation
- Sort and prioritize incoming inquiries based on ticket status



MICROSOFT DYNAMICS 365 INTEGRATION

- Click-to-call from within Dynamics
- Screen pop with details and customer record
- Create new contacts and leads with a single click
- Take notes and capture call details in Dynamics during active call

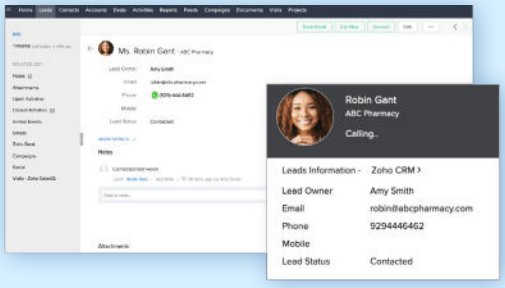
- Schedule meetings: Quickly and easily add AnyMeeting® virtual meeting details to any new or existing calendar event
- Start meetings: Click to start virtual meetings from Outlook or Microsoft 365 calendar. Meetings will include a meeting title, start and end time, attendee list, meeting agenda and more
- Track outbound calling
- Capture audio recordings and store them in the account record



ZOHO INTEGRATION

- Click-to-call from within Zoho
- Screen pop with details and customer record
- Create new contacts and leads with a single click
- Take notes and capture call details in Zoho during active call

- Contact Center's API can integrate with virtually any system of record. The scope of integration is determined by Zoho's available APIs and the specific business re-quirements of the customer

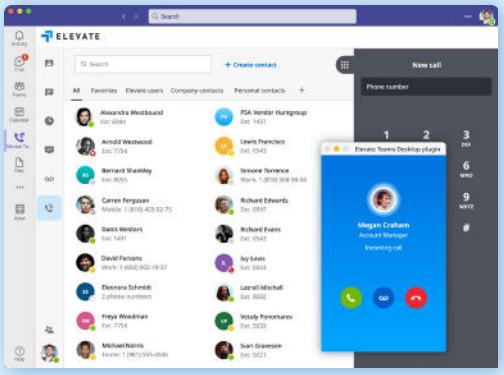


ELEVATE	CONTACT CENTER

MICROSOFT TEAMS INTEGRATION

- Access 100+ enterprise-grade calling features within Teams alongside Teams chat, meetings, and file sharing
- Send and receive SMS/MMS messages seamlessly
- Manage voicemails and review call history directly in Teams
- Support advanced work-flows with hunt groups, call queuing, and archiving
- Securely back up Elevate phone calls and SMS, plus Teams meetings and chats, with simple search and retrieval

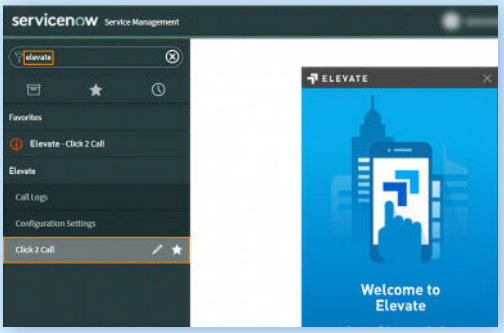
- Omnichannel support across voice, chat, SMS, email, and WhatsApp
- AI features like sentiment analysis, real-time summaries, and evaluations
- Intelligent routing and queue management for timely responses
- Advanced analytics and dashboards for better customer insights
- Calls in Teams: Let frontline users answer customer calls routed to them using their Microsoft Teams endpoint, while still enjoying the advanced call handling capabilities to route and manage customer interac-tion from the contact center



SERVICENOW INTEGRATION

- Click-to-call from within ServiceNow
- Screen pop caller details
- View ticket status based on caller ID for faster context
- Create new support tickets for customers

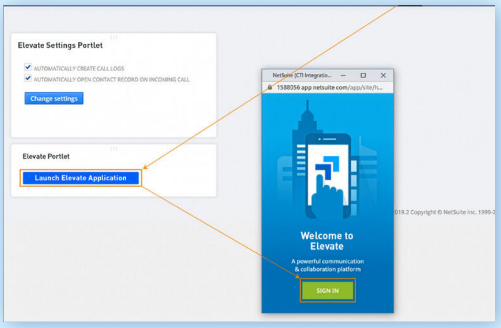
- Screen pop with options for additional context
- Track outbound calling
- Record calls: Capture audio and screen recordings of interactions with customers and automatically store them in their contact record within ServiceNow



NETSUITE INTEGRATION

- Click-to-call from within NetSuite
- Screen pop with details and customer record
- Create new contacts and leads with a single click
- Take notes and capture call details in NetSuite during active call

- Click-to-call: Click on any contact to make calls using Contact Center directly within NetSuite
- Screen pops: Pull up existing customer records on incom-ing calls
- Create records: Create new contacts and leads with just one click
- Log calls: Quickly and easily take notes and log call details directly within NetSuite while on an active call

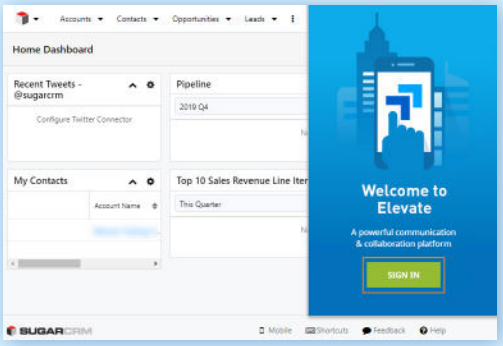


ELEVATE	CONTACT CENTER

SUGARCRM INTEGRATION

- Click-to-call from within SugarCRM
- Screen pop with details and customer record
- Create new contacts and leads with a single click
- Take notes and capture call details in SugarCRM

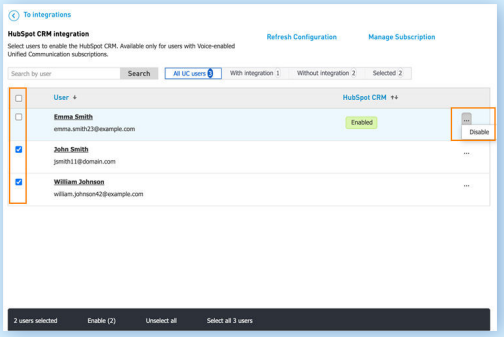
- Contact Center's API can integrate with virtually any system of record. The scope of integration is determined by SugarCRM's available APIs and the specific business requirements of the customer



HUBSPOT INTEGRATION

- Place calls directly from HubSpot with click-to-call
- Automatically log inbound and outbound calls with duration, time, and user activity
- Screen pops display contact details on incoming calls for faster, personalized responses
- Track call activity with custom dashboards and reporting for performance insights

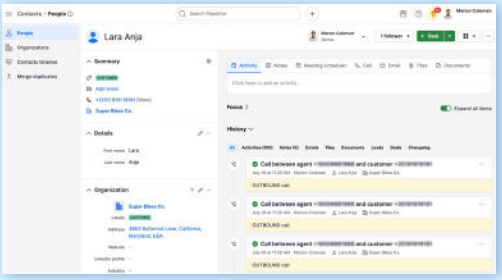
- Screen pop with options for additional context
- Capture recordings and automatically store them in the account record
- Access ticket status manually, or build self-serve call flows for customers with ticket creation
- Sort and prioritize incoming inquiries based on ticket status



PIPEDRIVE INTEGRATION

- Automatic logging of inbound and outbound calls directly within Pipedrive
- View real-time call details without having to manually enter information or consult multiple systems

- Contact Center's API can integrate with virtually any system of record. The scope of integration is determined by Pipedrive's available APIs and the specific business requirements of the customer



Available in the U.S. Only. Global availability planned for 2026.

QUESTIONS? CONTACT US TODAY!

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