Sure Business
Systems

CallSwitchOne

Integrations

CallSwitch One always plays well with others – Enjoy integration with leading CRM platforms, industry-specific management systems, and others.

CallSwitchOne
Integrations

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CallSwitchOne™

CallSwitchOne
Integrations

Introduction

CallSwitch One comes with a range of plug-and-play integrations designed to improve business efficiency and productivity.
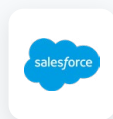
All the integrations are available for setup via the customer dashboard, with a simple and easy to manage process.

Learn more about the integrations available and how CallSwitch One works with each solution to help you create a cohesive SaaS ecosystem.

CRM integrations

If you operate a business with a Customer Relationship Management (CRM) system, it's likely that this solution sits at the heart of your day to day operations, helping sales, support, and marketing teams function efficiently.

CallSwitch One operates with leading CRM solutions including Salesforce, HubSpot, and Pipedrive. Learn more about each integration.

Salesforce
CRM

Enhance your CRM environment to drive productivity in your sales and marketing teams by streamlining their workflows using our CallSwitch One integration for Salesforce.

- Click-to-dial browser extension: Place calls from within Salesforce by clicking on any phone number, saving time and improving call efficiency.
- Instant screen-pop: Incoming calls trigger screen pops with customer information at hand, enabling quality interactions.
- Call logs: Log details of all calls within Salesforce, including voicemails, call-recordings alongside your customer notes.
- Contact sync: Synchronised contact information across CRM and UC platforms.

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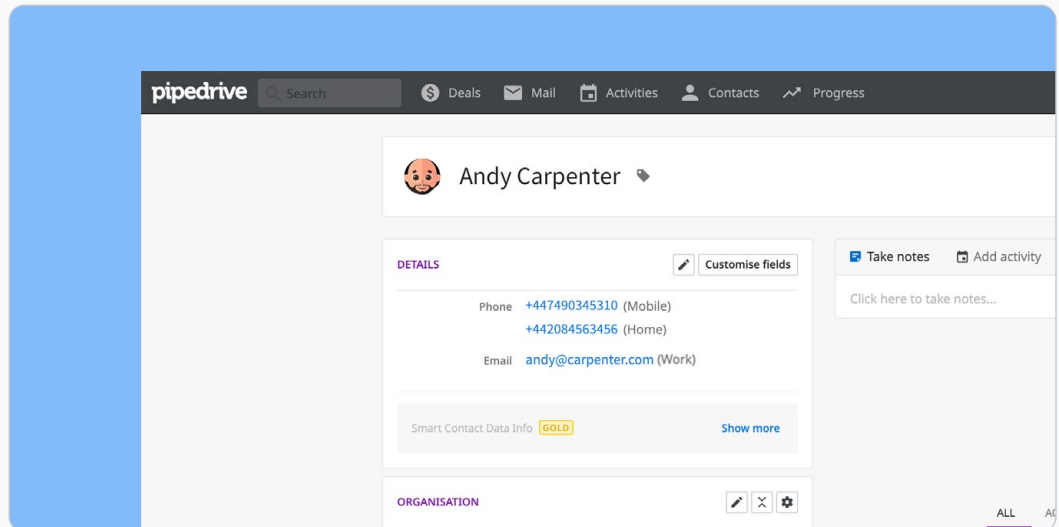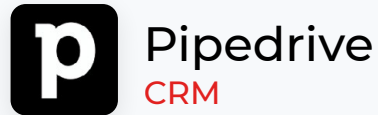
Pipedrive
CRM

Our integration to Pipedrive is seamless and simple to set up. Increase your efficiency and productivity via a host of features including:

- Click-to-dial functionality for on-screen phone numbers.
- Contact syncing, with instant caller identification.
- Automatically updated call-logs, with voicemails and call recordings as easy-to-reach notes in Pipedrive.
- Call recordings and voicemail transcription.

Intercom
CRM

Combine the Intercom app with the CallSwitch One platform and make it easier for your teams to support and engage with your customers. Gain call logging functionality, contact recognition, call recordings and more.

- Call Logging: View call and contact details within Intercom alongside helpful notes and access to important call recordings.
- Contact Sync: Sync your CallSwitch One and Intercom contact information to make reaching customers easier than ever before.
- Easy Click-to-Dial: Speed up customer communication when you turn all onscreen phone numbers into clickable links.

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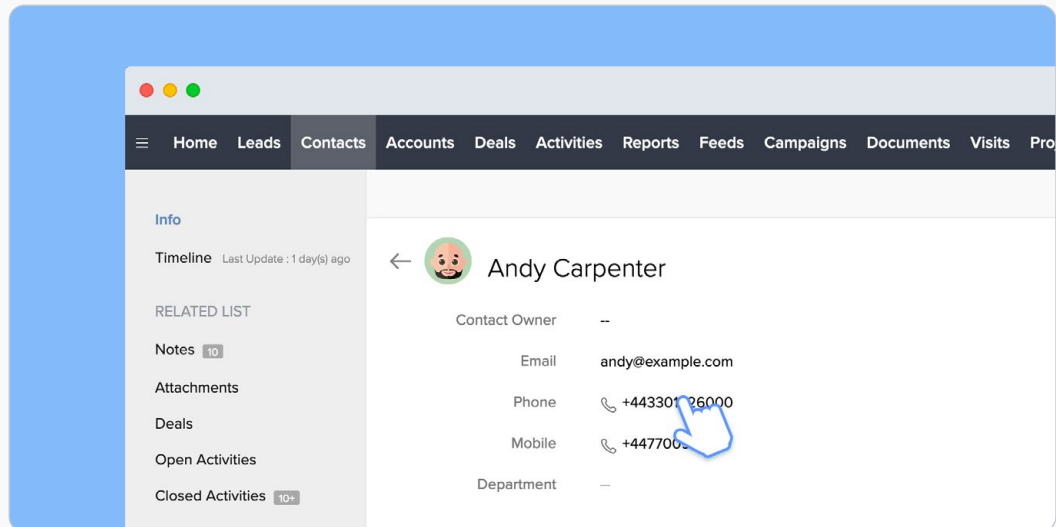
Zoho
CRM

Enjoy seamless integration with our business phone system and Zoho CRM, with features such as:

- Contact synchronisation for improved client information management.
- Call recordings, voicemail and automatic call activity logging.
- Click-to-dial that saves time spent manually dialling phone numbers.

Vtiger
CRM

For businesses using Vtiger CRM to align customer information for marketing, sales and support teams, enhance your solution further with our seamless out-the-box integration.

- Your CRM holds all the contact information your teams need – sync this with your phone system to further unify your records.
- Help inbound teams deliver the best possible service to customers with screen-pop functionality that puts a customer-centric view at their fingertips.
- Log all data pertaining to call records, with voicemails and call recordings stored.
- Turn every number held within Vtiger into a clickable link with our click-to-dial browser extension.

HubSpot
CRM
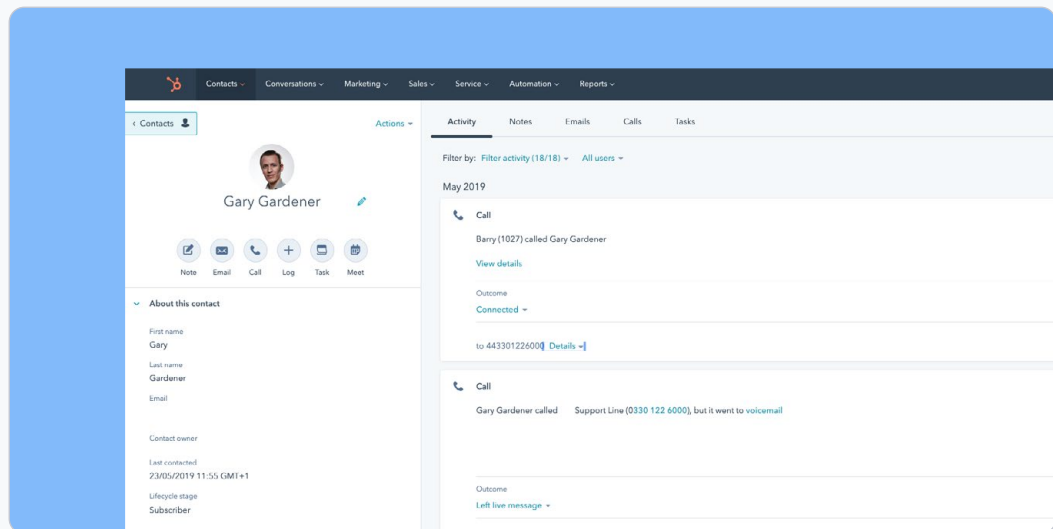
Integrate CallSwitch one with HubSpot and expand the functionality of your CRM software, helping you focus your sales and marketing efforts.

- Instant inbound call recognition for improved CX.
- Contact synchronisation between CRM and phone system records – keeping your top leads within easy reach.
- Click-to-dial phone numbers displayed in browsers improves outbound efficiency.
- Comprehensive call logging.

Capsule
CRM

Enhance Capsule CRM with our powerful phone system integration. Get instant click-to-dial, auto activity logging, call recording, contact integration and a host of call features.

- Streamline your workflow by making all phone numbers instantly available through click-to-dial.
- Automatically sync your Capsule CRM contacts, so your hottest contacts and most important clients are easily reachable.
- See call activity without having to leave your Capsule CRM dashboard, with logs including call durations and call times.
- Benefit from voicemail to email, transcriptions and call recordings.
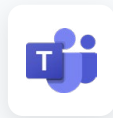
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Vincere
CRM

Vincere is the CRM of choice for recruitment and staffing agencies who rely on real-time interaction with clients, candidates, and prospects.

CallSwitch One integrates seamlessly with Vincere to enhance their capabilities by offering advanced call logging and contact management, and allowing for click-to-dial within the Vincere web-application.
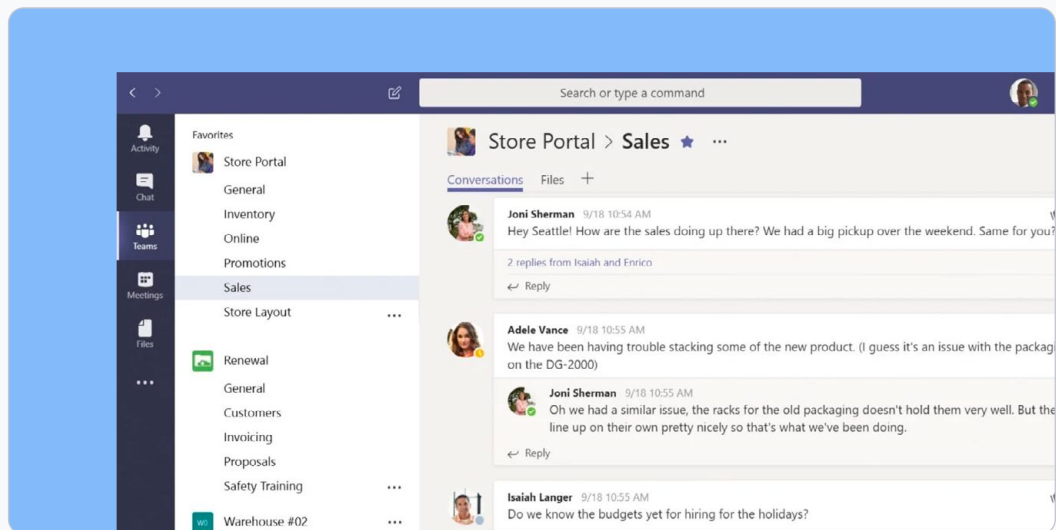
- Log calls within your contact profile in Vincere to ensure a historical record of interactions.
- Sync your phone and CRM address books to ensure accurate information.
- Turn any phone number in Vincere into an instantly dialable link to save agents time.
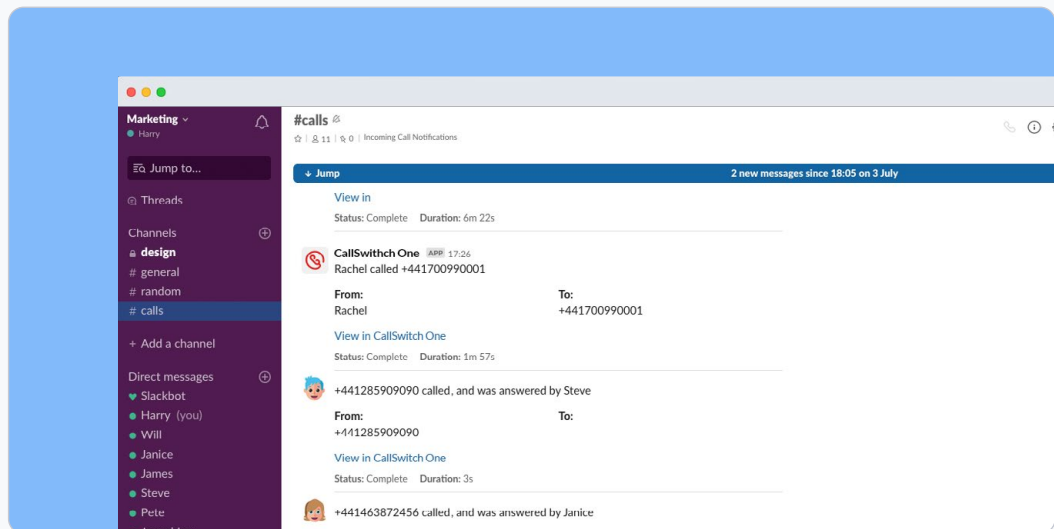
Business communications & productivity

Microsoft Teams
Productivity

CallSwitch One offers a deep integration with Microsoft Teams, providing an enhanced voice solution for your Microsoft Teams users, allowing them to benefit from CallSwitch One phone system features without leaving their Teams application.

- Use Teams desktop and mobile applications to make and receive voice calls, while making use of the full CallSwitch One call routing, hunt groups, call queues, and native call recording and CRM integrations.

- Make use of the inclusive call bundles that come with each CallSwitch One licence.

- Enjoy enterprise grade security and resilience from our purpose-built voice infrastructure.

- Offer genuine endpoint flexibility by having Microsoft Teams users sit within your CallSwitch One solution seamlessly alongside users who prefer to make use of our proprietary applications.
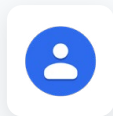
CallSwitchOne™

Slack
Productivity

For businesses who already make use of the Slack messaging and file-sharing solution, leverage the CallSwitch One integration to enhance Slack while improving team productivity and efficiency.

• Receive call activity notifications in your Slack channel of choice. View incoming calls, call duration, see active calls and even see if you've missed any calls.

• See when contacts are trying to get in touch with you, your department or office, including internal calls between your teams.

• Easily access your call recordings and receive instant notifications to your chosen Slack channel, including personal or team channels.

CallSwitchOne™

Phonebook integrations

If your business is using a Cloud Office suite that includes contact directory functionality, it's vital that your contact information is kept centrally, up-to-date, and can be treated as a single source of truth – which is why CallSwitch One offers integration to leading contact directory software providers.

Google Contacts
Phonebook

With Google Contacts integrated with your CallSwitch One UC solution, you can ensure your contact list is fully synchronised across all users and devices.

- Easily identify inbound calls from your most important customers, clients and opportunities.
- Automatically synchronise your Google Contacts so they're available to your phone system, for seamless and direct calling.
- Your Google Contacts are accessible to you via your chosen device, from smartphones to desk-phones, laptops to desktop computers.
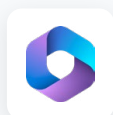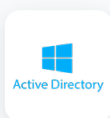
Microsoft 365
Phonebook

The CallSwitch One integration with Microsoft 365 is an effective and efficient way to integrate your business contacts with your unified communications system. Enhance customer experience by helping your agents identify callers instantly and offer a more personalised service.

- Instantly view your Microsoft 365 contact details, the moment they call your business phone number and offer a tailored experience.
- Automatically synchronise Microsoft 365 contacts with your phone system. Your most important contacts are visible for outbound calls.
- Make your Microsoft 365 contacts accessible to you via the device of your choice, from mobile device to desk-phones, laptops to desktop.

CallSwitchOne™

Single sign-on (SSO) support

Single sign-on (SSO) is an identification method that enables users to log in to multiple applications and websites with one set of credentials, streamlining the authentication process for users.

CallSwitch One offers SSO functionality for leading cloud office providers, Microsoft and Google.

Microsoft Active Directory
Single sign-on

Businesses making use of Microsoft Active Directory as part of their Microsoft software suite can now benefit from SSO support with CallSwitch One, meaning additional security for CallSwitch One dashboards and streamlined logins for employees.

- Synchronise an active list of CallSwitch One users within Microsoft Active Directory, alongside their login credentials.
- Enforce business security protocols including multi-factor authentication when logging into your CallSwitch One dashboard.
- Allow users to login via any CallSwitch One app, on their preferred device, from wherever they are working – without the need for additional passwords.
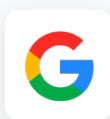
Google Workspace
Single sign-on

CallSwitch One offers SSO support for Google Workspace, so organisations placing Google at the heart of their day-to-day business operations can support employees with streamlined and secure login to their dashboards.

- Store your list of CallSwitch One users and extensions within Google Workspace to align them with their Google login credentials.
- Allow users to login using their Google credentials via any CallSwitch One app, on their preferred device, from wherever they are working.
- Protect your CallSwitch One dashboard with your Google security protocols, including features such as multi-factor authentication.

CallSwitchOne™

Call recording

CallSwitch One includes native cloud-based call recording, offering a 90-day rolling archive of calls, complete with secure data centre storage, as well as integration with leading cloud storage providers should you need to retain copies of their recordings longer term.

For customers operating in regulated industries and subject to compliance requirements, such as MiFID II or PCI-DSS, CallSwitch One offers integration with cloud-based call recording solution, CallCabinet, our preferred and approved compliance software partner.

CallCabinet
Call recording
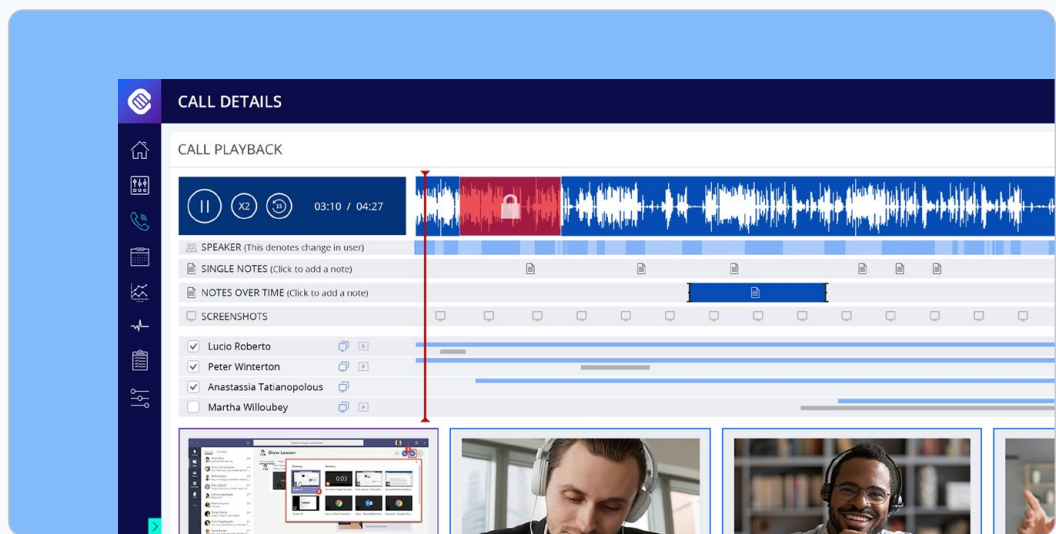
CallCabinet delivers the ultimate telephony compliance and analytics suite, including:

• Advanced search and retrieval.

• 256-bit encryption.

• Long-term immutable, geo-redundant storage.

• Payment platform integration with PCI redaction for CNP card payments.

• Comprehensive voice and speech analytics with actionable reporting and insights.

CallSwitchOne™

Cloud storage

While CallSwitch One offers 90-day rolling storage for the native call recording feature included with the solution, we also offer an easy to setup integration with the leading cloud storage providers: Amazon S3, Microsoft Azure, Google Drive, and Dropbox.

This enables call recordings to be backed up automatically, for longer durations, or with additional geo-redundancy if required for compliance.
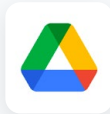
Call Detail Record (CDR) data can also be automatically backed up for businesses to retain a copy of their communications history.

Amazon S3
Cloud storage

Azure
Cloud storage

Google Drive
Cloud storage

Dropbox
Cloud storage

CallSwitchOne™

Browser extensions

CallSwitch One includes easy to setup browser extensions for Google Chrome and Mozilla Firefox that allow you to extend phone system features directly into your chosen browser, increasing productivity and efficiency.

- Turn all on-screen phone numbers into clickable links. No additional hardware needed.

- Make calls from directly within the browser window without opening your CallSwitch One application.

- Works across all web pages – from your favourite CRM solution, to a website you're visiting.

- Change Caller IDs within the Firefox browser and call clients or leads from the phone number of your choosing.
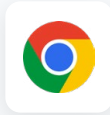
Chrome
Browser Extension
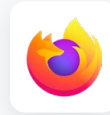
Firefox
Browser Extension

CallSwitchOne™

Data Management

CallSwitch One offers one-click integration to leading data management and visualisation engines to help enable data-driven business insights.

Power BI
Data Management
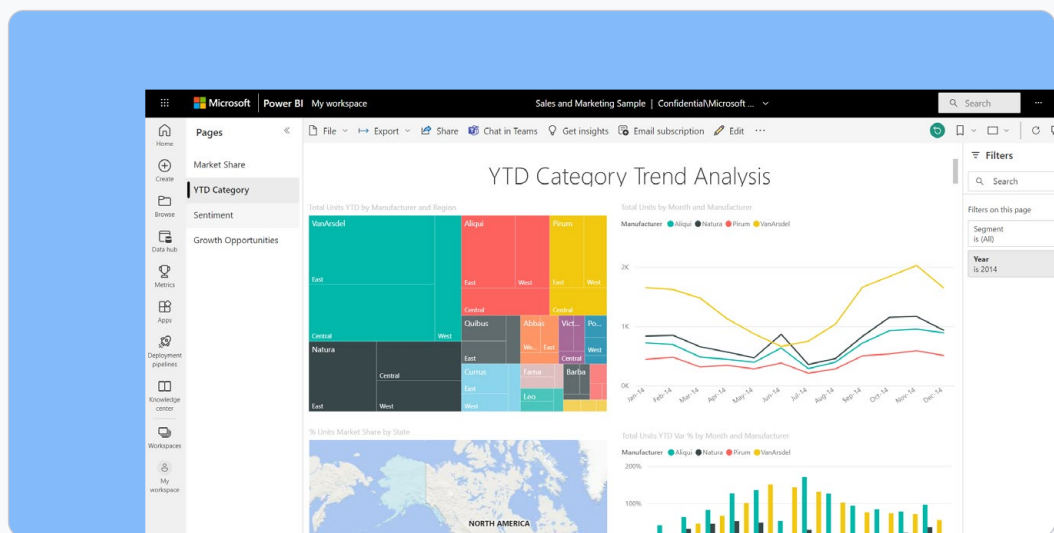
With around 100,000 businesses contributing to the 5 million active users, Microsoft Power BI is perhaps the most popular data analytics and visualisation platform on the market. Leverage our out-the-box integration to Power BI to visualise business critical data for informed decision making.

Live Wallboards
CallSwitch One is able to maintain a live data-stream with Power BI, enabling businesses to create live wallboards within Power BI for real-time visualisation.

Historical Reporting
Schedule historical data reports from CallSwitch One to cover bespoke time-frames, enabling businesses to build long term snapshots of performance.

Detailed Insights
Track key call statistics including call volumes, durations, and their associated costs, as well as call ratings and notes added by your employees.

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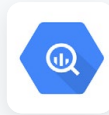
BigQuery
Data Management

BigQuery is a leading data warehousing solution, created by Google Cloud, and enabling real-time analytics and visualisation through a range of integrations to BI solutions including Google's own Looker platform. It is used by an estimated 20,000 businesses, and now integrates with CallSwitch One.

A single source of truth
Store data related to call volumes, durations, costs, ratings and employee notes in your central BigQuery data warehouse

Real-time wallboards
Gather instant insights through a live-integration, sending real-time data to any BI integration supported by BigQuey, including Google Looker.

Long term insights
Review historical data for any timeframe required. Just select the start and end date for analysis and build detailed long term reports.

CallSwitchOne™

Open API & webhook library

Unlock the ultimate integration toolkit, with our comprehensive Open-API and webhook library, allowing you to build bespoke features, integrations, or simply tweak existing CallSwitch One features to support specific requirements.

Easily extract call data to build customised wallboards, incorporate routing from our cloud-PBX into existing applications, or build your own applications and services from scratch – your imagination is the only limitation.

Just some of the API commands available within the platform: Manage audio files and Music on Hold playlists

- Set call routing and call forwarding for your phone numbers.

- Schedule operating hours for numbers.

- View call costs, call recordings and CDR data.

- Manage short codes that work with your VoIP phone devices.

- View caller identification and make requests for alternative caller IDs.

- Add and manage SIP trunks to connect CallSwitch One to any platform.

- Create Wallboards for users aggregated as daily, weekly or monthly statistics.

- View provisioned VoIP phone devices on your account.

- Create queue groups, request stats such as people in queue or average wait time..

- Store contacts and their phone numbers/email addresses.

- Create, view and manage speed dials.

- Send and receive SMS messages from your numbers.

CallSwitchOne™

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