

CRM System

Customer Relationship Management System — software for organizations, designed to automate interaction with customers (clients), in particular, to increase sales, optimize marketing and improve customer service by storing information about customers and the history of relations with them, establish and improve business processes and subsequent analysis results.

Smartswitch includes the functionality of CRM systems (still rather limited). Working with the CRM functionality is made through the user's personal web account.

Step by step instructions on how to configure is in the [Configuring CRM](#).

Available features

Currently functionality in CRM **Smartswitch** allows you to:

- Maintain a [Contacts](#) in a database
- Adding specific [Contact labels](#)
- Add and browse the [Comments](#) for each [Contact](#)
- Make and receive calls from your personal web account by clicking on the phone number or contact
- When an incoming call comes, the system automatically recognizes the caller or dialed subscriber and shows [Contact card](#)
- Upon completion of the call, the user can leave a comment for a call in the supernatant [Contact card](#)
- Hangup calls from web cabinet
- Attach to active call from web cabinet as a eavesdropper
- Attach to active call from web-cabinet as a whisperer
- Attach to active call from web-cabinet, switching it into a 3-way call.

A [Contact](#) database and comments can be shared between users of the same group (the default).

Also by default, users will not see the information of foreign groups.

This allows you to sell a service of a CRM system to users of a [Virtual PBX](#).

All which is needed from user to use these features:

1. launch SIP phone
2. log into web-cabinet with a web browser

Below these features are described in more details

Contact popup

After this feature has been activated, on incoming/outgoing call from the SIP phone system automatically recognizes calling or called subscriber and displays [Contact card](#) in web-cabinet.

Contact popup for calls to other users

After this feature has been activated, on calls to other users from the same group, the user will see [Contact card](#) in his web-cabinet.

Click to call

After this feature has been activated, user will see the "Call" button in web-cabinet near each phone number.

On pushing it, system will generate a call with auto-pickup command to his registered SIP phone, and then system will generate outgoing call to number which has been pressed.

Outgoing call will be generated according to [Billing](#) and [Routing](#) settings on the user.

Eavesdrop

After this feature has been activated, user will see the calls from other users of his group in call listing.

Then user could choose any call and, by pressing the corresponding button, start eavesdropping.

On pushing the button, the system will generate a call with auto-pickup command to user's registered SIP phone.

Next system will forward audio stream from the call to which user has attached to his SIP phone.

Whisper

Same as **eavesdrop**, however additionally user is allowed to speak to SIP phone and his speech will hear a party which he chose when attaching from web-cabinet.
The other party won't hear him.

Conference

Same as **whisper**, however a user's speech will be heard by both parties of a call, to which user has attached from web-cabinet.

Pickup

After this feature has been activated, a user will be able to see the calls from other users of his group in calls listing in web-cabinet. Next user can choose any unanswered call and pick it up by pressing a corresponding button.
On pushing the button, system will forward a call with auto-pickup command to user's registered SIP phone.

Hangup

After this feature has been activated, a user will be able to hangup any call from calls listing in his web-cabinet.

[Русский перевод](#)