



PRODUCT OVERVIEW

CRM Integration

Your phone system and your CRM working as one,
so every call starts with the right record open.

Communications, IT & Cybersecurity.
Business Technology, Made Simple.



Know Who It Is Before You Answer

When the phone rings, a small box appears on screen with the caller's name and details pulled from your CRM. One click opens their record, so you start the call knowing who they are and what happened last time.

Every Call Logged, Without Typing

Calls in and calls out are written into your CRM against the right contact, with the date and time on each one. The note someone used to add by hand now happens on every call, whether they remember or not.

Dial From the Record

Click any number in your CRM and the call is placed through your phone system, on the desk phone or the app, whichever that person uses. Working down a call list is one click a call.

Works With Your CRM

Elevate connects directly to Salesforce, Microsoft Dynamics 365, ServiceNow and Zoho. For most others, our Red Cactus partnership bridges the gap, with more than 200 CRM systems supported.

We check your CRM first, then build the integration around how your team actually uses it. This is what goes in, and how it fits together.

Built Into Elevate

Salesforce, Microsoft Dynamics 365, ServiceNow and Zoho connect straight to Elevate on the Pro licence, with nothing extra to install. Everything on this page works the same way whichever route you take.

Red Cactus for the Rest

For other CRMs, Bubble from Red Cactus does the connecting, and it's just as quick to set up. It supports more than 200 systems, from general CRMs to industry platforms such as Reapit for estate agents.

Recordings and Write-Ups on the Record

After a recorded call, the recording and Elevate's AI summary are added to the contact in your CRM, so a manager can catch up on a morning of calls without listening to each one.

Set Up for Each Person

Every user is connected individually, so the pop-up shows what matters to their role, and the buttons and actions can be tailored: open the record, add a note, raise a ticket.

We Check Before We Promise

Every CRM behaves differently, so we run a feasibility check first: what your CRM allows, what the integration can do with it, and what it can't. You get a clear answer before anything is ordered.

Installed and Supported by Us

We connect the accounts, set up each user and show your team how it works. Afterwards it is supported alongside your phone system under our Service Level Agreement, so if anything goes wrong, you ring us.

NEXT STEP

Book a Feasibility Check

Tell us which CRM you use and we'll confirm what the integration can do with it, show it running, and give you a design and a price before anything is ordered.

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