MICLOUD CRM INTEGRATIONS RELEASE 4.0

Call history for the user. If a call is not registered in CRM that will also be marked.

The email icon is shown when a user has configured an email template icon.

Create/Relate case/opportunity icon the call to a case or opportunity. Existing cases will be shown

This section will allow you to scroll through all of the recent interactions that anyone at your company has had with the contact.
You will be able to see any Open tickets you have with the contact, their status, when they were submitted

The notes section could be used to add notes into the CRM, by adding @mention a colleague could be informed of the call discussion.

The name of the user and organization can be used as a clickable link to take the user directly to the user record inside of the CRM.

1st icon – edit the record in the CRM
2nd icon – re-assign the call to another record
3rd icon – de-associate the number to current matched person/account/lead

An exclamation mark is shown to indicating that the call is not saved in the CRM yet.