Quick guide to Istra CRM
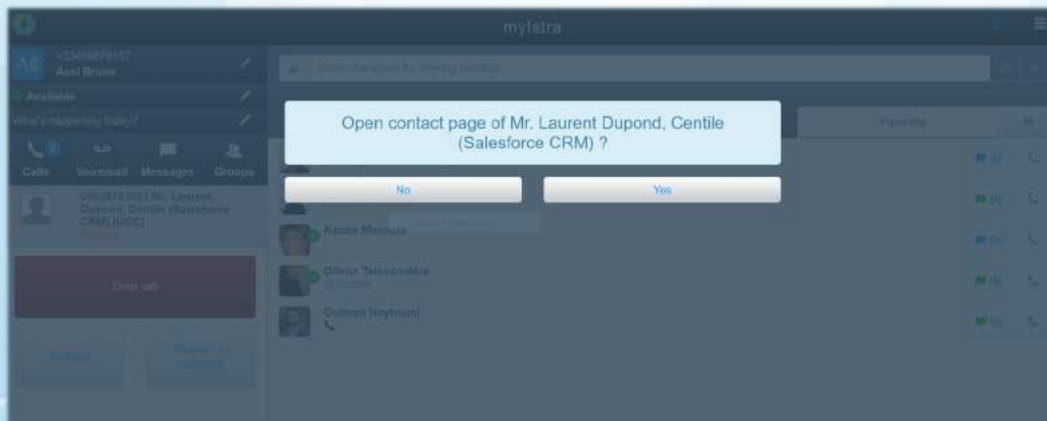
Istra CRM allows telephony integration in several CRM (Salesforce, Sage…). The user can now make a call in one click and have a contact page opening.
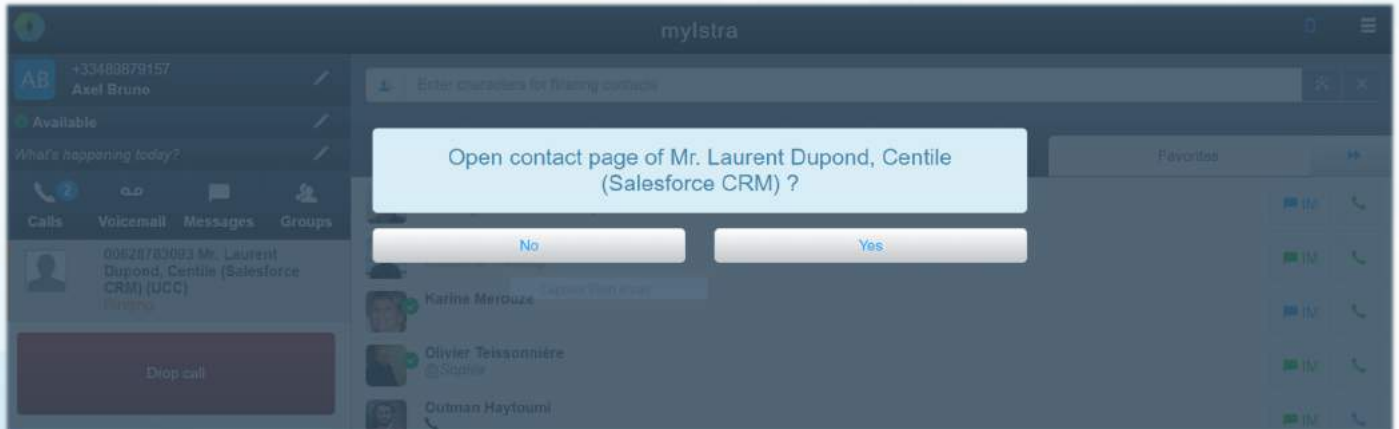
KEY FEATURES

- Caller identification

- Click to call

- Contact page opening

- Fully integrated to myIstra

- Contact search in the CRM

  from myIstra
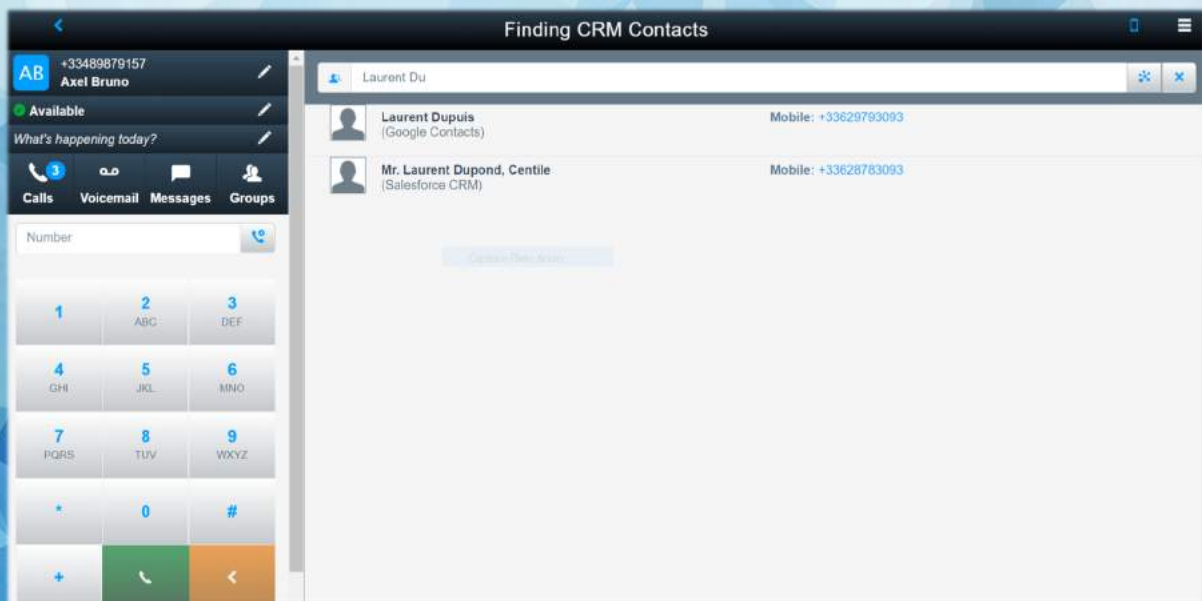
Caller identification

On an incoming call, see who is calling you. Choose to open the contact page in your connected CRM.

Search from myIstra

From myIstra, find the contacts in your connected CRM directory. Then, call the contact by clicking on their name.