

# CRM Widget

Last Modified on 12/31/2020 11:55 am EST

The CRM widget allows users to open specified URLs based on incoming call activity. This widget is useful if you wish to open web-based CRM or other records based on incoming call information. Although this widget is called the CRM widget it can be used to open any type of web page. Any web pages launched through this widget will open in the default browser on the computer.

## Open URL on Demand

If you do not wish to open a URL on call events but wish to open them on demand you can use the CRM button in the **My Stream Widget** as illustrated in Figure 01.



## Settings

Access settings for the CRM Widget by clicking the cog icon in the top-right corner of the CRM Widget. The settings dialog will also open automatically when adding the CRM Widget to the dashboard for the first time.

- **Name:** The name of this CRM widget. This name is used to identify which CRM window to open when using the Open CRM button in My Stream.
- **Open On:** Specifies when to open the specified URL.
  - **Never:** Disable this CRM widget.
  - **Ring:** Open when you have an incoming ringing call.
  - **Answer:** Open when you answer an incoming call.
- **Open URL in new window:** When checked the specified URL will open in a new browser popup window instead of inside the widget. This can be used for web pages that do not allow themselves to be embedded in iframes.
- **Open on calls from internal extensions:** When checked, the specified URL will open on calls from internal extensions.
- **URL:** The URL to open. Use the following variables in the URL to replace with information from the call.
  - **\${CALLER\_ID\_NAME}:** The caller ID name of the incoming call.
  - **\${CALLER\_ID\_NUMBER}:** The caller ID number of the incoming call.
  - **\${DID}:** The phone number this call initially dialed to enter the phone system.
  - **\${USER}:** The username of the current user.
  - **\${PBX(key)}:** The phone system variable with the given key that is attached to the incoming call. If the variable does not exist on the incoming call the value will be set to a blank string. For example, `www.google.com/search?q=${Caller_ID_Name}` would search Google for the incoming caller's name.