CRM Widget

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The CRM widget allows users to open specified URLs on incoming call activity, and allows web pages to be embedded in the iSymphony client interface. This widget is useful if you wish to open web based CRM or other records based on incoming call information, or create your own custom widget for use within the panel. Although this widget is called the CRM widget it can be used to open any type of web page.

> By default the CRM widget will want to open the URL in an embedded iframe inside the widget. Some web pages specify X-Frame-Options which prevent themselves from being embeddable in an iframe. This issue is identified by a blank page showing in the CRM widget, when it should be populated by the web page. If you cannot modify the destination webpage's X-Frame-Options to allow embedding from the iSymphony application you will have to use the **Open URL in new window** option. Another workaround to this issue is to proxy the website with an HTTP proxy, like NGINX.

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. See My Stream Widget for more information.

> CRM Widgets, with a setting of open **Always,** are not accessible via the CRM button, as they are not related to call information.

Settings

Settings for the CRM Widget can be access by clicking the cog icon in the top right hand 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 use to identify which CRM window to open when using the Open CRM button in My Stream.
Type:	Specifies the type of popup you wish to open. • **Web:** Opens a web based CRM. • **Application**: Opens an application based CRM. Requires that the Desktop Client be installed.
Open:	Specifies when to open the specified URL. • **On Demand:** The URL will only be opened when the user selects the CRM button, in the My Stream Widget. • **Always:** The URL will always be open. > Variables related to call state will not be available in the URL, when the **Always** open method is selected. See URL below, for more information. • **On Ring**: Open when you have an incoming ringing call. • **On 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. > This option is disabled when the open method is set to **Always.**

URL:	The URL to open. The following variables can be used in the URL, which will be replaced with information from the call, or the user. **URL Variables:** • **${USER}:** The username of the current user. • **${USER_ID}:** The id of the current user. • **${USER_LOGIN_ID}:** The id of the current user's client login. The variables below will only be available if the open method is set to **On Demand, On Ring,** or **On Answer.** • **${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. **${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. The key must be an alphanumeric sequence (matching [a-zA-Z0-9]*). The key is used to access any state on the related Asterisk channel (as configured in the Asterisk dial plan). For a list of available keys you can: 1. Check your custom dial plan 2. inspect a current asterisk channel by running this command on the Asterisk server: ``` asterisk -x "core show channel <channel id>" ```