paperbot

CRM Calling System

Client conversations.
Within your CRM.



Bring calling into your client-management workflow. Connect through Paperbot PBX or a supported third-party PBX, with lead management included and optional tools to help your team review conversations and decide the next step.

Keep calls close to the client record.

CRM Calling System is a plugin for the CRM. Your team can initiate calls from the client-management environment, keeping the relationship in view as they move from an enquiry to a conversation and a considered follow-up.



Open the record

Start with the client or lead context your team needs before making contact.

Make the call

Initiate the conversation from the CRM through the PBX selected for your setup.

Choose the next step

Use the conversation to decide the appropriate follow-up within your sales workflow.

Lead management is included with CRM Calling System.

Handcrafted
for your business.

Thoughtful communication.
A more connected client experience.



Built around the relationship

A useful call begins with understanding the person behind the record. We shape the calling setup around how your team works with clients, so the conversation feels connected to its business purpose.

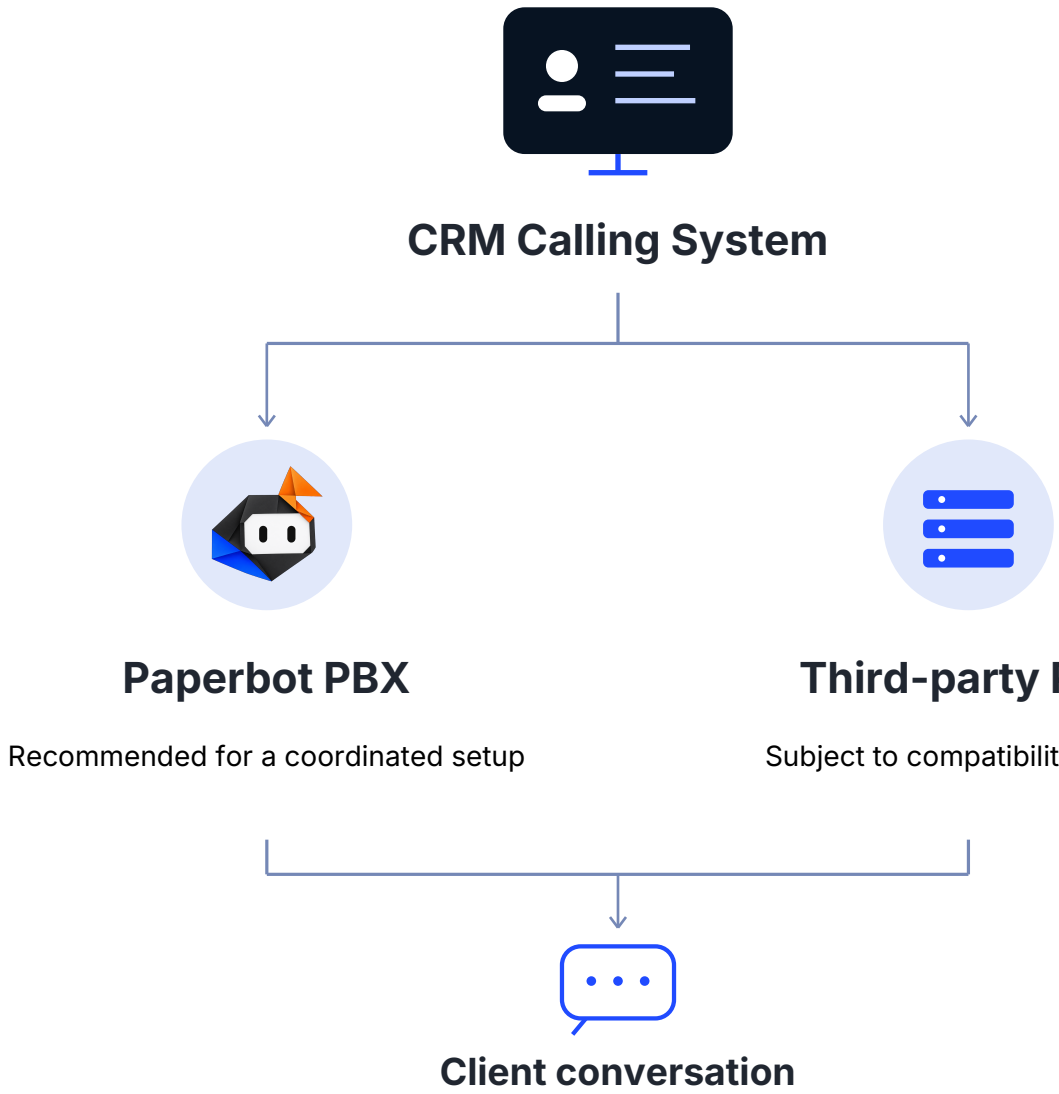
Considered from setup to use

The CRM plugin, PBX choice and optional review tools each have a defined role. Bringing those decisions together creates a clearer starting point for the people managing conversations every day.

Technology shaped around the way your team connects.

One CRM workspace. Your choice of PBX.

The CRM is where your team starts the call. The PBX is the calling system connected behind that experience. Choose Paperbot PBX or review a third-party PBX for the intended setup.



The same starting point for your team

Your team works from the CRM while the selected PBX supports the calling connection. Provider compatibility, required access and the intended calling arrangement are reviewed before configuration.

A coordinated setup.
A simpler way to manage.

Paperbot PBX is our recommended option for easier management, integration and configuration, with a coordinated setup intended to support better calling performance.



A clearer configuration path

Using Paperbot PBX brings the calling backend and CRM integration into a setup our team can coordinate together. It simplifies the work of aligning the PBX connection with the CRM calling experience.

Management with the full setup in view

A coordinated approach makes it easier to review configuration and address connection requirements across the calling environment. Performance also depends on the network, calling routes and deployment conditions.

Paperbot PBX is the recommended option; final configuration follows the agreed calling requirements.

Choose the PBX that fits your setup.

Use Paperbot PBX for a more coordinated setup, or bring an existing third-party PBX for compatibility review. The choice is made around your calling environment and business requirements.



Paperbot PBX

Our recommended option for easier management, integration and configuration. Paperbot can consider the PBX and CRM connection together when shaping the calling setup.

Third-party PBX

Use an external PBX where the required connection is supported. Its interfaces, access requirements and provider arrangements are reviewed before the integration approach is agreed.

Confirm the connection before implementation

Share the PBX you use or the calling arrangement you need. We will review the available integration path and define the setup with your team. Compatibility is confirmed for the specific provider and environment.

Your existing PBX. A considered connection.

An existing calling backend can be part of the discussion. CRM Calling System can connect with a third-party PBX where its supported interfaces and the intended workflow allow.



Start with the environment you have

Share the PBX details, relevant documentation and the calling workflow your team needs. We review the available connection options and the access required to configure the CRM integration.

Keep responsibilities clear

The third-party provider continues to operate its PBX under its own service arrangements. Paperbot defines the CRM connection and configuration within the agreed engagement, coordinating provider requirements where needed.

Third-party PBX support is subject to compatibility review and agreed integration scope.

More context.
A better-informed next step.

Extend CRM Calling System with optional tools for reviewing recorded conversations. These add-ons help your team revisit what was said and bring more context to a sales decision.



Call Transcription & Translation

Turn recorded calls into readable transcripts across supported languages and translate the recorded audio for review. Language availability and the required setup are confirmed for your implementation.

AI Call Evaluation

Review AI-generated assessments and scores alongside the recorded conversation and its supporting context. Use the evaluation to inform your team's judgement about the appropriate next action.

Optional additions to the calling workflow

These are add-ons to CRM Calling System. Each has its own detailed product page and brochure; select the capabilities relevant to your team when agreeing the calling setup.

Review the conversation. Decide the next action.

A conversation can reveal a question to answer, a concern to address or a lead ready for another discussion. Optional review tools help your team return to that context before following up.



Bring useful context into sales follow-up

Where the relevant add-ons are enabled, transcripts, translation and AI evaluation can support a closer review of the recorded call. Your team can consider the conversation alongside the lead's existing CRM context.

Keep the decision with your team

Use that review to decide whether to clarify a question, arrange another conversation or take the next appropriate step in the relationship. Evaluation supports judgement; it does not replace the person responsible for the client.

Review features depend on the selected add-ons and available recordings. No sales outcome is guaranteed.

Configured around your calling requirements.

Agree the calling environment before setup, so the CRM plugin, PBX connection and any optional review tools work towards the same operational purpose.



Calling environment

Confirm the intended destinations, number requirements, CRM environment and PBX choice. For an existing PBX, share its details and arrange the access needed for the connection review.

Team workflow

Explain how your team manages leads and client conversations. Identify whether transcription, translation or AI evaluation would support the way recorded calls are reviewed and followed up.

A clearly defined setup

Configuration, integration responsibilities and any selected add-ons are agreed for your environment. Calling availability and supported languages are confirmed for the required implementation.

Connected calling. Considered delivery.

A calling setup should be understandable to the team using it. We review the agreed CRM-to-PBX connection and the intended calling flow before handing the setup over.



Check the agreed calling journey

Review the connection from the CRM through the selected PBX against the intended use. Where add-ons are selected, confirm how the relevant recordings and review outputs fit into the agreed workflow.

A clear starting point for your team

Confirm the PBX in use, the applicable configuration and the optional capabilities enabled for the setup. Your team can then approach client conversations with a clearer understanding of its calling environment.

Ongoing service responsibilities and any additional requirements are agreed for the engagement.

Bring every call closer to the relationship.

CRM calling, included lead management and a PBX choice shaped around your business. Extend the conversation with the review tools your team needs.

Let's shape your calling setup

Tell us how your team contacts clients, which CRM and PBX environment you use, and which optional review tools would help. We will review the requirements and define the right calling setup with you.

Connect with Paperbot

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Handcrafted for your business.