Telephone Integration for MS CRM 4.0

Telephone Integration connects your Telephone system with Microsoft CRM 4.0.

Incoming Calls
If an incoming call is detected, a window pops up from the taskbar displaying details of the caller.
The information shown in this balloon is depending on the server-settings and if the number can be found within CRM.
If so, it shows up e.g. name, number, e-mail address, etc.. and the regarding entry is opened automatically.

Outgoing Calls
It's possible to start a call directly from within CRM. Therefore a new button is placed in CRM.

With a click a new dialogue which states all available numbers of the regarding CRM-record (e.g. account, contact, lead…) is opened and users can choose the number to dial and start the call immediately.

Furtheron users have got the possibility to use the "direct call" functionality of the Telephone Integration balloon.

The call can be started from the balloon. The recent used number and Clipboard integration is accessible in the context menu.

Activities
The Add-on is capable of creating activities for both, incoming and outgoing calls. It's possible to define the behavior on each client separately and decide if a new phone call activity should be created or stored automatically when lifting the receiver. A new activity can also be created for unrecognized users. Also a new e.g. Contact can be created if the caller is unknown.
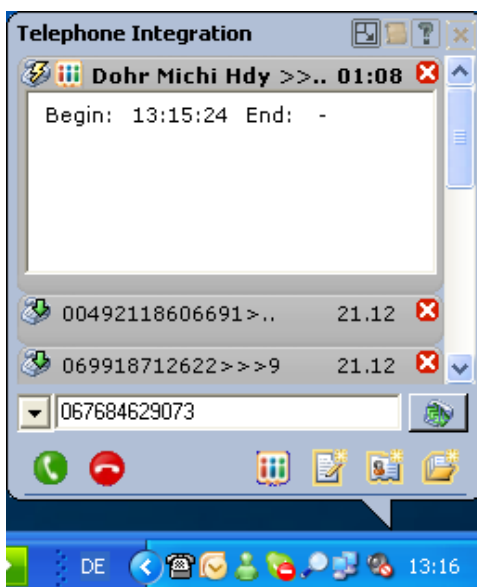
Visualization

Telephone Integration provides two visualization options:

1. <u>Simple Balloon:</u>
   Shows up basic caller information. Other options are hidden for better performance.
   similar to the Microsoft ™ Outlook Email Popup

2. <u>Professional Balloon</u>
   Displays detailed caller information and time for the actual and most recent calls (e.g. the 10 last ones)
   Additionally it shows up all options, like "open record, create account, create contact, create activity" and the "direct call"-box.

History
Telephone Integration keeps detailed track of previous calls. This allows analyzing calling times and and quickly call back by selecting any previous phone call. Additionally, the history allows users to create contacts, accounts, phone call activities subsequently

Offline capability
There is no limitation on our Telephone Integration when a user goes offline with CRM.

Successfully tested on:

- ALCATEL OmniPCX Office
- Nortel BCM 50
- Siemens HiPath 3550 V5.0
- 3com VOIP system, SuperStack 3 NBX Network Telephony
- Televantage 6
- Avaya S8500 Communication Manager 3.1
- ……

Technical conditions

- TAPI Interface (Tapi 2 and Tapi 3 supported)

Licensing

Server license: (5 CALs included) 600€

Additional CAL: 110€

Annual Support: 22€

Prices exclusive of VAT

PTM EDV-Systeme GmbH
Bahnhofgürtel 59
8020 Graz
AUSTRIA
Phone: +43 316 680 880
office@mscrm-addons.com
www.mscrm-addons.com

Microsoft Dynamics CRM