

TelephoneIntegration

for MS Dynamics CRM 2011



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TelephoneIntegration connects your phone system (TAPI, OCS, Lync and/or Skype) with Microsoft CRM. The main user interface is provided by a pop-up-window, the balloon. The balloon provides all functionalities that are needed for a more efficient handling of incoming and outgoing calls.

Main features:

- Each call refers to a "call box" that contains all details about the call (duration, direction, ...) and the caller (name, location, ...).
- The context-menu provides several CRM-functionalities such as:
 - Open a CRM-record
 - Create new-records (e.g. a contact)
 - Create a CRM-activity
- The integrated CRM search enables a direct search of CRM records (accounts, contacts, leads) and a direct start of outgoing calls within the balloon. Therefore, there is no need to explicitly open CRM for starting an outgoing call. Additionally, users can search within the call-history.

There are several ways to initiate outgoing calls:

- A call can be started directly within CRM by clicking on the new "call-number" button placed in the CRM-menu. The balloon will pop-up displaying all available numbers of the opened CRM-record and the user can choose the number to be dialed.
- The direct call option allows users to start a call directly from the balloon by entering a phone number.
- The Clipboard integration provides the option to copy a number from e.g. an email-signature and to start the call immediately.

History

The history keeps a detailed track on previous calls. This allows analyzing call durations by using the helpful grouping/sorting features. Furthermore, users are able to quickly call back by selecting any previous phone call. Additionally, users can create CRM records (e.g. contacts, leads, etc.) directly within the history.

MS Lync Chat Integration

allows connecting Lync-messages to CRM records. Conversations can be stored into a new "chat" entity as well as into letter activities associated to the regarding record.

Predictive Dialer

dials numbers of CRM-records which have been attached to marketing lists of call-campaign-activities. The scheduled calls can be processed simultaneously by various users. During processing, details about the called record and the marketing list are displayed within the call-window.

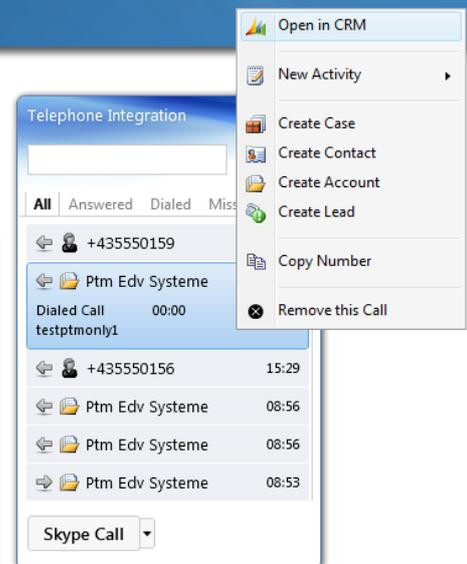
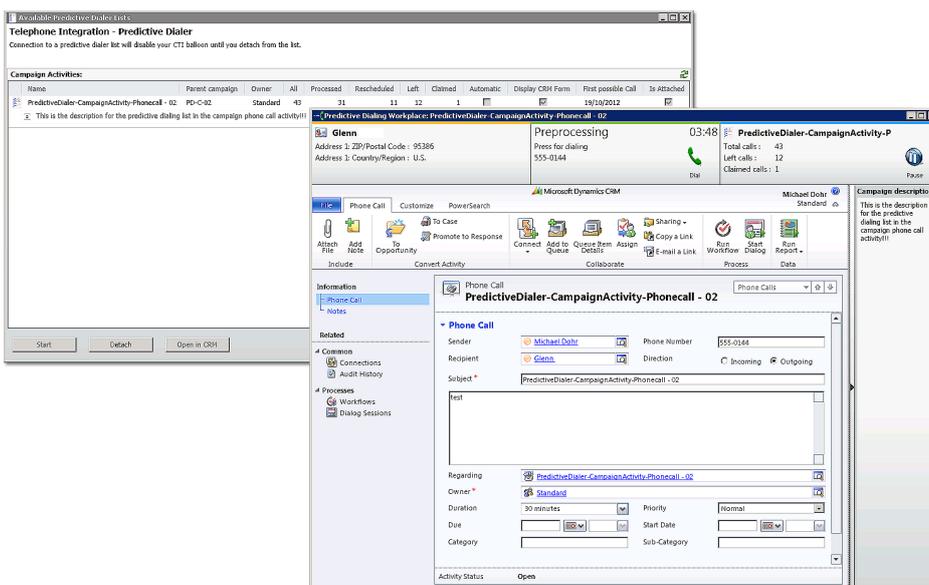
Integration

TelephoneIntegration supports three different interfaces for connecting phone systems with CRM:

- Direct connection via TAPI (requires TAPI-driver)
- OCS (Office Communications Services) / Lync
- Skype integration

Availability

- MS Dynamics CRM 2011 On-Premise (RTM) / Hosted (IFD) / Online



Licensing (Prices exclusive of VAT)

Server license: (5 CALs included)	600€
Additional CAL:	110€
Annual Support:	22€



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