



VOIPEX WINDOW TO CRM

Let your CRM talk

The “VOIPEX Window to CRM” service offers fast use of information from your CRM when calling with concurrent automatic call logging in the CRM.

When an incoming call is received, customer data are downloaded from the CRM and displayed in a smart window on the PC screen. In this window, you can also insert comments for storing in the CRM. Actual information about incoming and outgoing calls is logged into your CRM without any operator intervention.

Integration of calls within the CRM can be implemented for Salesforce, Microsoft Dynamics and Sugar systems. The condition of linking telephony with CRM is to use our cloud PBX for incoming and outgoing calls.

Functions

displaying customer information from the CRM during a call,

automatic registration of calls on customer card in the CRM,

ability to record comments for the call without having to trace a contact in the CRM,

ability to create tasks in the CRM during calls via the phone window,

dialling directly from the CRM.

Supported CRM systems

- Sugar CRM version 6.4.1 (on premise and cloud variant) and higher
- MS Dynamics CRM version 2011 (on premise) and higher or cloud version
- Sales Force version API36 (cloud variant) and higher
- Ranyet CRM with API version 2 and higher

Incoming call

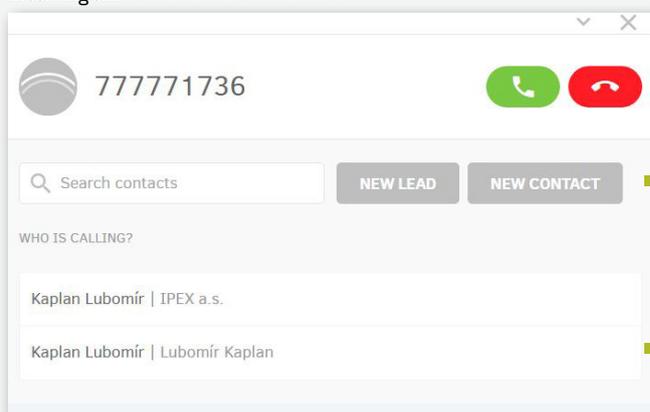
When a call comes, a CTI window pops up automatically on your PC during ringing and shows:

- › caller's phone number,
- › company name if the respective contact is listed in the CRM,
- › a field containing up to 6 optional types of information from CRM at user disposal,
- › in this field, you can optionally display information from CRM, such as customer type by importance, customer's turnover or debt, vendor, technician, last order, last customer contact, etc.

Incoming call from a number stored in CRM



Incoming call from an unknown number



From the opened CTI window, a completely new customer card can be created in CRM.

If the call comes from an unknown number but is made by an existing customer, it is possible to "assign the call" to the customer's CRM card.

Automatically stored call data

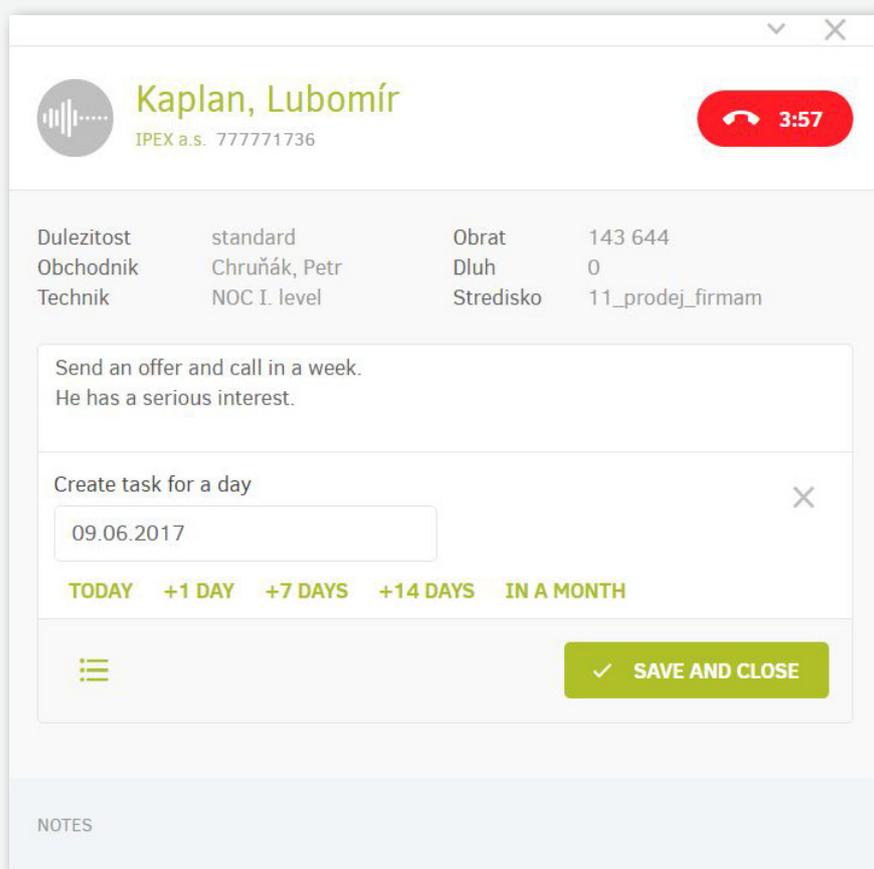
The following data, regarding each incoming and outgoing call, are automatically stored in your CRM without any user intervention:

- › to whom in the company the customer called (you will get to know, for example, how often the customer calls for technical support)
- › who from your company last called the customer
- › date and time of the call

Entering notes on calls and creating tasks in CRM

Once a call is received into the open CTI window, it is possible to enter data that is subsequently written into the customer's CRM card.

You can write information about the call in the form of a text note. Alternatively, the user can create a task that is then written to the respective contact in CRM.



The screenshot shows a CRM window for a customer named Kaplan, Lubomír. The window includes a header with the customer's name and phone number, a call duration indicator, and a table of contact details. Below the table is a text input field for notes and a task creation form with a date picker and a 'SAVE AND CLOSE' button.

Dulezitosť	standard	Obrat	143 644
Obchodník	Chruňák, Petr	Dluh	0
Technik	NOC I. level	Stredisko	11_prodej_firmam

Send an offer and call in a week.
He has a serious interest.

Create task for a day

09.06.2017

TODAY +1 DAY +7 DAYS +14 DAYS IN A MONTH

SAVE AND CLOSE

NOTES

Click To Call – dialling directly from CRM

You can make a phone call by clicking the phone number directly in the CRM environment. It is not necessary to retype numbers to your phone, which saves time. The condition for setting up this function is to enter telephone numbers in the CRM system with the "callto:" flag.

Call records on customer card

Data of the phone communication with you is automatically stored on the customer's card in your CRM – both customer's calls to you and your calls to the customer. Based on this data, you can set reminders for your vendors in your CRM so that they are in regular contact with the customer.

Předmět	Stav	Kontakt	Datum vytvoření	Datum poslední úpravy	Do data	Přiděleno k	
☎ Odchozí hovor - 42	Uskutečněný	+4205432367...	10.01.2017 ...	10.01.2017 ...	10.01.2017 ...	Tesařová, M...	upravit
☎ Odchozí hovor - 42	Uskutečněný	+4205432367...	10.01.2017 ...	10.01.2017 ...	10.01.2017 ...	Tesařová, M...	upravit
☎ Přichozí hovor - 42	Uskutečněný	+4205432367...	10.01.2017 ...	10.01.2017 ...	10.01.2017 ...	Tesařová, M...	upravit
☎ Přichozí hovor - 42	Uskutečněný	+4205432367...	10.01.2017 ...	10.01.2017 ...	10.01.2017 ...	Tesařová, M...	upravit
☎ Přichozí hovor - 42	Uskutečněný	+4205432367...	09.01.2017 ...	09.01.2017 ...	09.01.2017 ...	Tesařová, M...	upravit
☎ Přichozí hovor - 42	Uskutečněný	+4205432367...	06.01.2017 ...	06.01.2017 ...	06.01.2017 ...	Tesařová, M...	upravit
☎ Přichozí hovor - 42	Uskutečněný	+4205432367...	06.01.2017 ...	06.01.2017 ...	06.01.2017 ...	Tesařová, M...	upravit
☎ Odchozí hovor - 42	Uskutečněný	+4205432367...	04.01.2017 ...	04.01.2017 ...	04.01.2017 ...	Švestková, L...	upravit

Implementation of telephony integration with CRM

- › installation of hosted PBX - VOIPEX iPBX,
- › creation of a technical user account in your CRM, allowing communication over API and writing and reading of necessary data,
- › definition of 6 types of data from CRM, which should be displayed by the CTI pop-up window,
- › VOIPEX communicator must be installed on each user station; it may run in the background.

User requirements

- › PC (Windows 7 and higher) / macOS (MAC OS X - Snow Leopard and higher)
- › stable internet connection
- › virtual VOIPEX iPBX telephone exchange + VOIPEX communicator
- › appropriate CRM license accounts for users who want to use the service