



## CTI for MS-CRM Integration

### « Full telephone integration for CRM Microsoft Dynamics »

#### Configuration requirements

##### Telephone exchange

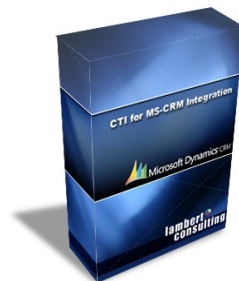
- TAPI 2.0 / 3.0 or Swyx

##### Server

- Microsoft Windows Serveur 2000 or 2003 with Active Directory
- Microsoft CRM Dynamics 3.0 or 4.0

##### Workstation

- Windows 2000, XP, Vista
- TAPI driver which corresponds to the telephone exchange (TAPI version) or SwyxIt application (Swyx version)
- Soundcard
- Microphone, headset



« CTI for MS-CRM integration 4.0 » offers a flexible and user-friendly interface between the telephone exchange (PBX) TAPI and Microsoft Dynamics CRM application, in order to speed up the user/operator's access to the client/information of the company.

#### Incoming calls :

Automatic registration display (lead, account and contact) of the caller, or automatic creation of a new activity associated to the number if the latter is missing in MS-CRM.

#### Outgoing calls:

Possibility to reach a correspondent directly through the Microsoft Dynamics CRM interface, or through the « CTI for MS-CRM Integration 4.0 » search function.



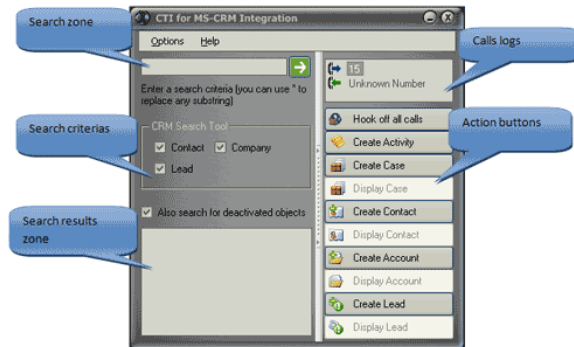
### FEATURES

- Compatible with the TAPI telephone exchange suppliers (Telephony API 2.0 and 3.0) and Swyx.
- Integrated search engine which enables an advanced search in Microsoft Dynamics CRM according to the name, telephone numbers, company or e-mail address, description, etc...
- Parameter management of the Microsoft Dynamics CRM application for window display and of the creation of actions (activity, incident, search number on a web site if it is not in the Microsoft Dynamics CRM) according to the caller's identity.
- Allocation of callers to users/teleoperators' groups of « CTI for MS-CR Integration 4.0 » which are listed in the telephone exchange (available for the SWYX version only).



# CTI for MS-CRM Integration

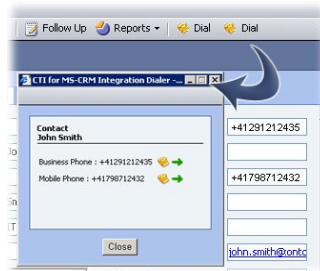
## OVERVIEW OF FUNCTIONALITIES



### Main window

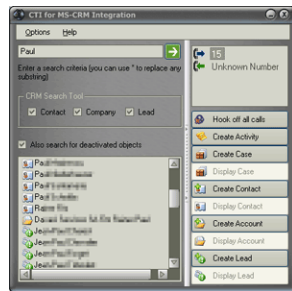
Information display of telephone activities according to incoming and outgoing call numbers registered in MS-CRM (including missed calls).

Simplified operations in order to display information, create actions or simply search for a correspondent from the CRM base. Possibility to customize the user interface (e.g.: Add/remove buttons, show small/big buttons or also add/remove actions on



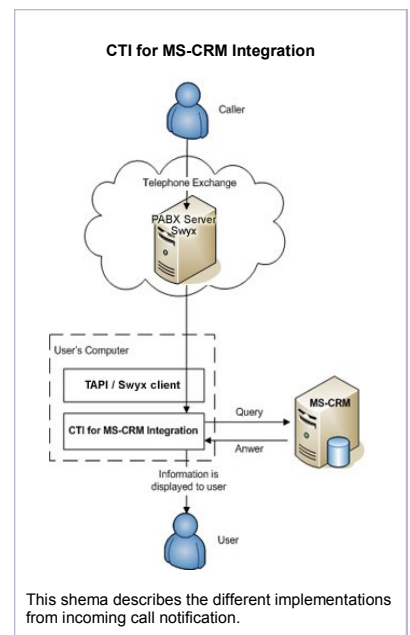
### Direct call from Microsoft Dynamics CRM

« CTI for MS-CRM Integration 4.0 » increases the potential of MS-CRM and enables you, with a simple click, to dial for example, one of the correspondent's numbers from the MS-CRM web interface.



### Search tool

Both simple and intuitive, « CTI for MS-CRM Integration » enables an advanced search solution in order to find correspondents in a transversal manner entities, for example lead, account, contact and also customized entities, according to telephone number, name, company, e-mail address,



## ABOUT MICROSOFT DYNAMICS CRM



Microsoft Dynamics CRM offers an integrated management of sales processes, marketing and client services within the working environment of Microsoft Outlook. This major version of Microsoft Dynamics CRM offers extended capacities of configuration and integration and enhances highly personalized solutions, adapted to the business and size of the company.

## ABOUT LAMBERT CONSULTING

LAMBERT CONSULTING is an ISV certified partner for Microsoft Dynamics CRM, Microsoft Business Solutions and Microsoft Gold Partner established in St-Prex and Fribourg in Switzerland. For over 10 years, LAMBERT CONSULTING has developed a recognized expertise in infrastructure management and in most technologies associated with Microsoft.

More information : <http://www.lambertconsulting.ch>

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