CTI for MS-CRM Integration

« Full telephone integration for CRM Microsoft Dynamics »

Configuration requirements

Telephone exchange

- TAPI 2.1 / 3.0 or Microsoft Lync 2010

Server

- Microsoft Windows Serveur 2000, 2003 and 2008 with Active Directory
- Microsoft Dynamics CRM 3.0, 4.0 or 2011 Online or On-Premise

Workstation

- Windows 2000, XP, Vista, Windows 7
- TAPI driver which corresponds to the telephone exchange or Microsoft Lync 2010
- Soundcard
- Microphone, headset

« CTI for MS-CRM integration » offers a flexible and user-friendly interface between the telephone exchange (PBX) TAPI or Microsoft Lync 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 the name and/or the CRM entity (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 dial a correspondent directly through the Microsoft Dynamics CRM interface, or through the « CTI for MS-CRM Integration » search function.

FEATURES

- Compatible with the TAPI telephone exchange suppliers (Telephony API 2.0 and 3.0) and Microsoft Lync 2010.

- 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.

OVERVIEW OF FUNCTIONALITIES
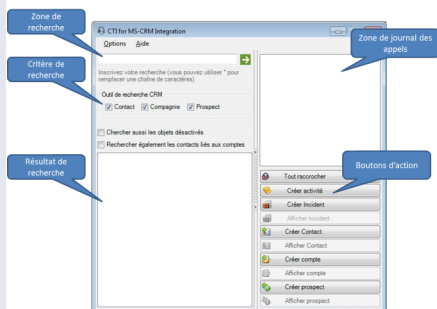
Main window

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

Simplified operations for information display, action creation or simply for re-searching a correspondent from the CRM base. Possibility of user interface customisation (e.g.: Add/remove buttons, show small/big buttons or also add/remove actions on contextual menu.)

If the caller doesn't exist in MS-CRM, he can be created manually or automa-ti-cally from « CTI for MS-CRM Integration ».
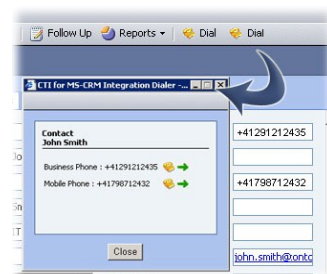
Direct call from Microsoft Dynamics CRM

« CTI for MS-CRM Integration » increases the potential of MS-CRM by allowing you, for exam-ple, by a simple click, to dial one of your correspondent's numbers from the MS-CRM web interface.
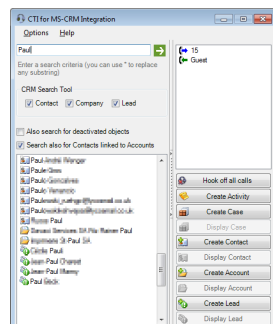
Search tool

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, etc...

This figure describes implementation from incoming call notification.
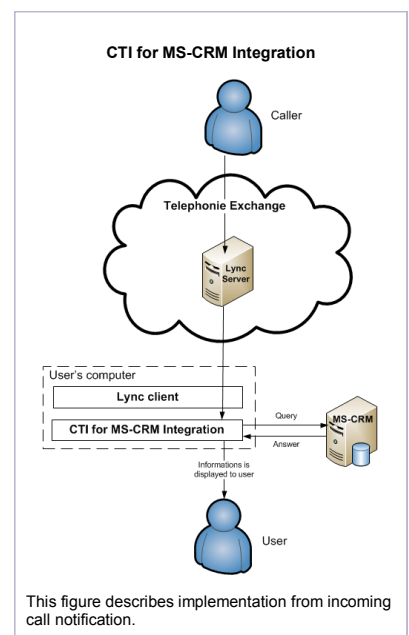
ABOUT MICROSOFT DYNAMICS CRM

Microsoft Dynamics CRM proposes 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 configura-tion and integration and enhances highly personalized solutions, adapted to the busi-ness and size of the company.

ABOUT DE LAMBERT CONSULTING SARL

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

Partner information

LAMBERT CONSULTING SARL
29, rte de Lussy
CH-1162 ST-PREX

Tél : +41 21 806 37 15
Fax : +41 21 806 34 15

info@lambertconsulting.ch

Microsoft
CERTIFIED
Business Solutions
Partner

Microsoft
GOLD CERTIFIED
Partner