

camrivoXTM

Flexor CTI for Microsoft Dynamics CRM

Flexor CTI fully integrates with Dynamics. The components appear in many parts of the screen.

The screenshot displays the Microsoft Dynamics CRM interface with several overlapping windows. The main window shows the contact details for 'Joe Bloggs' under the 'Information' tab. A 'Call With Flexor' pop-up is visible over the phone number fields. To the right, a 'Phone Call Information' window shows a list of calls. At the bottom, a taskbar shows the system tray with a 36% battery level and the time 10:03.

Contact: Joe Bloggs - Information

Field	Value
Salutation	Mr
First Name	Joe
Middle Name	
Last Name	Bloggs
Job Title	Sales Support
Parent Customer	
Currency	Pound Sterling
Business Phone	01223-XXXXXX
Home Phone	01223-XXXXXX
Mobile Phone	07985-XXXXXX
Fax	
Pager	
E-mail	sales@bloggsandco.com
Address Name	123 The Avenue
Street 1	
Street 2	
Street 3	
City	
State/Province	Cambs
ZIP/Postal Code	
Country/Region	UK
Phone	
Address Type	
Shipping Method	
Freight Terms	

Phone Call Information

Date	Time	Priority	Duration
10/22/2008	12:00 PM	Normal	1:01
10/22/2008	12:01 PM	Normal	1:01
10/22/2008	12:03 PM	Normal	1:01
10/22/2008	1:32 PM	Normal	1:01
10/22/2008	1:33 PM	Normal	1:01
10/22/2008	1:34 PM	Normal	1:01
10/22/2008	1:37 PM	Normal	1:01
10/22/2008	1:38 PM	Normal	1:01

Call With Flexor

Business: 01223-XXXXXX
Home: 01223-XXXXXX
Mobile: 07985-XXXXXX

The screenshot displays the 'Applications and Devices' window in Flexor. The 'Applications' section lists several integrations:

Name	Description
Microsoft Dynamics Integration	Plug-in to add CTI to Microsoft Dynamics CRM
Microsoft Outlook Integration	Plug-in to add CTI to Microsoft Outlook.
NetSuite Integration	Plug-in to add CTI to NetSuite.
Salesforce Integration	Plug-in to add CTI to Salesforce.

The 'Devices' section shows a table with columns for 'Status' and 'Description'. One device is listed as 'Connected' with the description '(snom360-SIP) @ http://192.168.10.11 (Password protected)'. Several 'Dynamics Plugin Configuration' dialog boxes are overlaid, showing settings for 'Click-to-dial', 'Account', and 'Contact Search'. One dialog shows a list of phone number fields to match against:

- Business Phone
- Home Phone
- Mobile Phone
- Address Phone
- Assistant's Phone
- Manager's Phone
- Telephone 3
- Address 1 Telephone 2
- Address 1 Telephone 3
- Address 2 Telephone 1
- Address 2 Telephone 2
- Address 2 Telephone 3

From the Flexor Applications and Devices window you can configure user preferences.

The screenshot shows the Microsoft Dynamics CRM interface in a Windows Internet Explorer browser. The main window displays the contact record for 'Joe Bloggs' under the 'Information' tab. A dropdown menu titled 'Call With Flexor' is open, showing three options: 'Business: 01223...', 'Home: 01223...', and 'Mobile: 0798...'. A red box highlights this menu. Below the menu, a purple arrow points from a text box to the 'Business' phone number field in the contact record. The contact record includes fields for Salutation (Mr), First Name (Joe), Last Name (Bloggs), Job Title (Sales Support), Business Phone (01223...), Home Phone (01223...), Mobile Phone (07985...), and E-mail (sales@bloggsandco.com). The status is 'Active'.

Contact: Joe Bloggs
Information

Details: Information, More Addresses, Activities, History, Sub-Contacts, Relationships, Workflows, Opportunities

Sales: Opportunities, Quotes, Orders, Invoices

Service: Cases, Contracts

Marketing: Marketing Lists, Campaigns

Status: Active

Done

Internet 100%

Start 2 Internet Explorer, Inbox - Microsoft Outlook, 57%, 10:35

A key feature is **click-to-dial** direct from the Contact record in Microsoft Dynamics CRM, meaning you save time and avoid mis-dialing.

The screenshot displays the Microsoft Dynamics CRM interface. On the left, a navigation pane shows sections for 'Details' (Information, More Addresses, Activities, History, Sub-Contacts, Relationships, Workflows, Opportunities), 'Sales' (Opportunities, Quotes, Orders, Invoices), 'Service' (Cases, Contracts), and 'Marketing' (Marketing Lists, Campaigns). The main area shows the 'Contact: Joe Bloggs' record with tabs for 'General', 'Details', 'Administration', and 'Notes'. The 'General' tab is active, showing fields for Salutation, First Name (Joe), Middle Name, Last Name (Bloggs), Job Title (Sales Support), Parent Customer, Currency (Pound Sterling), and Address fields (Street 1-3, City, State/Province, Freight Terms). A 'Phone Call Information' dialog box is open on the right, with tabs for 'Phone Call' and 'Notes'. The 'Phone Call' tab is active, showing fields for Subject, Regarding (Joe Bloggs), and Owner (The Administrator). The status is 'Open'. A call information popup is visible in the bottom right corner, containing the following information:

2093 (snom360-SIP) - 2093341
Contact: Joe Bloggs
Company:
Number: 0790001000

A purple callout box with a white border contains the text: "Once you have started a call, Flexor displays caller ID, number and contact name. You also have the option to **End Call** before it is answered." A purple arrow points from this box to the call information popup.

The screenshot displays the Microsoft Dynamics CRM interface within a Windows Internet Explorer browser window. The browser address bar shows the URL `http://.../Camrivox/loader.aspx`. The CRM interface includes a navigation pane on the left with sections for 'My Work' (Activities, Calendar, Imports, Duplicate Detection, Queues, Articles, Reports, Announcements) and 'Customers' (Accounts, Contacts). The main 'Activities' pane shows a table with one record: a 'Phone Call' with subject '[Called]', regarding 'Joe Bloggs', priority 'Normal', and start date '7/21/2009 9:17 PM'. A dialog box titled '2092... (snom360-SIP) - 2092...' is open, showing 'Matched contacts' with a list containing 'Joe Bloggs ()', 'Daniel . Joe ()', and 'None of these'. Below the list is a 'Select contact' button. At the bottom of the dialog, there are three buttons: a green checkmark (Answer), a red X (Reject), and a circular arrow (Repeat). Two callout boxes provide context: one points to the contact list with the text 'If an incoming call is associated with multiple existing records, Flexor offers a choice of contact to open.', and another points to the Answer/Reject buttons with the text 'In the event of an incoming call, Flexor provides the option to Answer or Reject the call.'

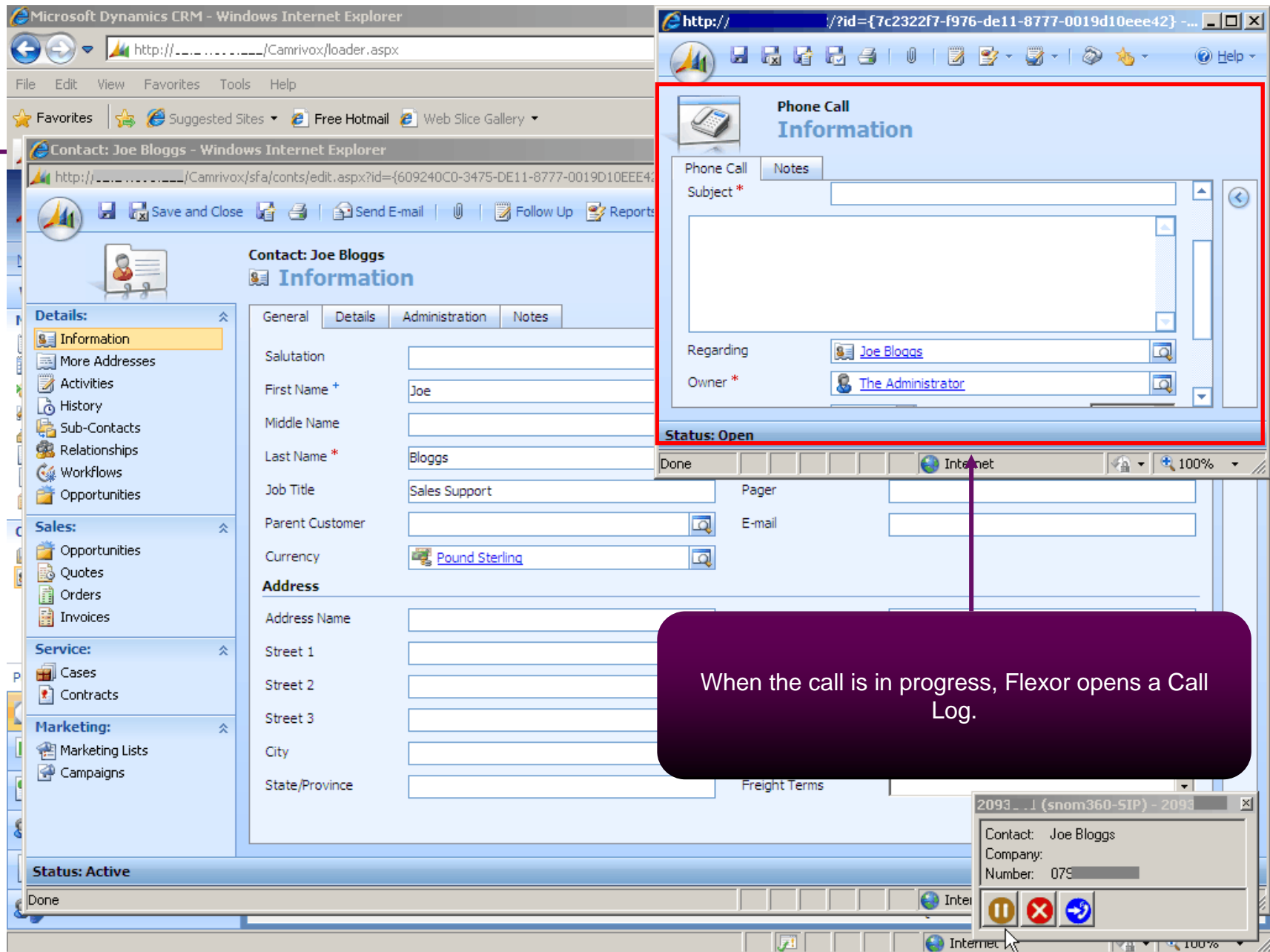
Activity Type	Subject	Regarding	Priority	Start Date	Due Date
Phone Call	[Called]	Joe Bloggs	Normal	7/21/2009 9:17 PM	7/21/2009

Matched contacts:

- Joe Bloggs ()
- Daniel . Joe ()
- None of these

Contact: Several matches found
Company:
Number: 0790555 1112

Buttons: Answer (Green Checkmark), Reject (Red X), Repeat (Circular Arrow)



The screenshot displays the Microsoft Dynamics CRM interface. The main window shows the contact record for Joe Bloggs, with fields for Salutation, First Name (Joe), Middle Name, Last Name (Bloggs), Job Title (Sales Support), Parent Customer, Currency (Pound Sterling), and Address. A secondary window titled "Phone Call Information" is open, showing fields for Subject, Notes, and Owner (The Administrator). A call control toolbar is visible at the bottom right, with buttons for Hold, End Call, and Transfer. A call information popup is also visible, showing contact details for Joe Bloggs.

When the call is in progress, Flexor provides further options, allowing you to place the call **on Hold**, and **Transfer** the call to another user.

The screenshot displays the Microsoft Dynamics CRM interface. The main window shows the contact record for 'Joe Bloggs' with fields for Salutation, First Name (Joe), Middle Name, Last Name (Bloggs), Job Title (Sales Support), Parent Customer, Currency (Pound Sterling), and Address. A 'Phone Call Information' dialog box is open, showing fields for Subject, Notes, Regarding (Joe Bloggs), and Owner (The Administrator). The status is 'Open'. A call log entry for '209C (snom360-SIP) - 209C' is visible in the taskbar, with a red box around the play button icon.

Phone Call Information

Phone Call Notes

Subject *

Regarding Joe Bloggs

Owner * The Administrator

Status: Open

Done Internet 100%

209C (snom360-SIP) - 209C

Contact: Joe Bloggs

Company:

Number: 079C...

If you put a call on hold, Flexor makes it simple to **Retrieve From Hold**, whilst the Call Log remains open to make edits.

The screenshot displays the Microsoft Dynamics CRM interface in a Windows Internet Explorer browser window. The main content area shows the 'Contact: Joe Bloggs' record under the 'Information' tab. The 'Details' section includes fields for Salutation, First Name (Joe), Middle Name, Last Name (Bloggs), Job Title (Sales Support), Parent Customer, and Currency (Pound Sterling). The 'Address' section includes fields for Address Name, Street 1, Street 2, Street 3, City, State/Province, ZIP/Postal Code, Country/Region, Phone, Address Type, Shipping Method, and Freight Terms.

Overlaid on the bottom right is a call transfer dialog box titled '2093 (snom360-SIP) - 2093'. It contains a list of 'Matched contacts' with 'Joe Bloggs ()' selected. Below the list is a 'Select contact' button. The dialog also shows 'Contact: Several matches found' and 'Company:'. A red box highlights the 'Transfer to:' field, which is currently empty, and a red arrow points from the text box below to this field.

To Transfer a call is equally simple enter the destination number, after which you either **Initiate Transfer or **Cancel Transfer****

The image displays two side-by-side browser windows from a CRM system. The left window, titled "Contact: Joe Bloggs - Windows Internet Explorer", shows the "Information" tab for a contact. It includes a left-hand navigation menu with sections for "Details" (Information, More Addresses, Activities, History, Sub-Contacts, Relationships, Workflows, Opportunities) and "Sales" (Opportunities, Quotes, Orders, Invoices). The main content area has tabs for "General", "Details", "Administration", and "Notes". The "Details" tab is active, showing fields for Salutation (Business Phone), First Name, Middle Name, Last Name, Job Title, Parent Customer, Currency, and an "Address" section with fields for Address Name and ZIP/Postal Code. The status at the bottom is "Active".

The right window, titled "Phone Call: Information - Windows Internet Explorer", shows the "Information" tab for a phone call. It includes a left-hand navigation menu with "Phone Call" and "Notes" tabs. The "Phone Call" tab is active, showing fields for Subject, Regarding (Joe Bloggs), Owner (The Administrator), Duration, Priority (Normal), and Due date (7/21/2009). The status at the bottom is "Open".

Below the browser windows is a sidebar with a "Personalize Workplace ..." section and a list of menu items: Workplace, Sales, Marketing, Service, Settings, and Resource Center. At the bottom of the sidebar, it says "1 of 3 selected." and a keyboard navigation row with letters A through R.

A dark purple callout box with white text says "To terminate the call, click on End Call". A purple arrow points from this box to a small pop-up window in the bottom right corner. The pop-up window has a title bar "2093 (snom360-SIP) - 2093" and contains the following text: "Contact: Joe Bloggs", "Company:", and "Number: 0790777777". Below the text are three icons: a green checkmark, a red 'X', and a grey circular arrow. The red 'X' icon is highlighted with a red square.

The screenshot displays the Microsoft Dynamics CRM interface. On the left, the navigation pane shows sections for Details, Sales, Service, and Marketing. The main area shows the 'Contact: Joe Bloggs' record with an 'Activities' tab selected. A table of activities is visible, with the entry '[No answer]' highlighted. A red box highlights the details of this activity, including the subject '[No answer]', the owner 'The Administrator', and the due date '7/22/2009'. A callout box points to the activity log with the following text:

When the call has ended, the **Call Log** remains open to add or edit comments. When finished, clicking on the **Save & Close** icon will close the log, and update your Contact Details automatically.

Microsoft Dynamics CRM - Windows Internet Explorer

http://.../Camrivox/loader.aspx

File Edit View Favorites Tools Help

Microsoft Dynamics CRM

The Administrator
Camrivox

New Activity New Record Go To Tools Advanced Find

Workplace

My Work

- Activities
- Calendar
- Imports
- Duplicate Detection
- Queues
- Articles
- Reports
- Announcements

Customers

- Accounts
- Contacts

Personalize Workplace ...

Workplace

- Sales
- Marketing
- Service
- Settings
- Resource Center

Activities

Search for records

Due: All Type: All View: My Activities

Activity Type	Subject	Regarding	Priority	Start Date	Duration
Phone Call	Enquiry	Joe Bloqqs	Normal	7/21/2009 4:23 PM	7/21
Phone Call	[Called]	Joe Bloqqs	Normal	7/21/2009 9:17 PM	7/21
Phone Call	[No answer]	Joe Bloqqs	Normal	7/22/2009 3:56 PM	7/22
Phone Call	[No answer]	Joe Bloqqs	Normal	7/22/2009 4:12 PM	7/22
Phone Call	[Called]	Joe Bloqqs	Normal	7/22/2009 8:56 PM	7/22
Phone Call	[Called]	Jonathan	Normal	7/23/2009 4:02 PM	7/23
Phone Call	Received call from Daniel		Normal	7/23/2009 4:16 PM	7/23
Phone Call	Received call from Daniel		Normal	7/27/2009 4:12 PM	7/27
Phone Call	[No answer]	Joe Bloqqs	Normal	7/29/2009 9:40 AM	7/29
Phone Call	[No answer]	Joe Bloqqs	Normal	7/29/2009 9:41 AM	7/29
Phone Call	[No answer]	Joe Bloqqs	Normal	7/29/2009 9:42 AM	7/29
Phone Call	[Received call]	Joe Bloqqs	Normal	7/29/2009 9:52 AM	7/29
Phone Call	[Missed]	Joe Bloqqs	Normal	7/29/2009 9:53 AM	7/29
Phone Call	[Missed]	Joe Bloqqs	Normal	7/29/2009 9:54 AM	7/29
Phone Call	[Missed]	Joe Bloqqs	Normal	7/29/2009 10:02 AM	7/29

1 of 15 selected.

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Done

Internet 100%

All calls made or received are recorded in **Activities**.

The screenshot displays the Microsoft Dynamics CRM interface in Internet Explorer. The main window shows the 'Phone Call Enquiry' form for a contact named 'Joe Bloggs'. The form includes fields for Sender (Joe Bloggs), Recipient (The Administrator), Subject (Enquiry), and a text area for notes containing 'Sales call'. Other fields include Phone Number (07...), Direction (Incoming), Regarding (Joe Bloggs), Owner (The Administrator), Duration (1 minute), Priority (Normal), and Due date (7/21/2009). The status is 'Open'. A red box highlights the form area, and a purple callout box points to it with the text: 'Clicking on an Activity shows how the call is automatically captured as a Call, with full details and notes.'

Microsoft Dynamics CRM - Windows Internet Explorer

Report: Call report - Windows Internet Explorer

Report Viewer: Call report - Windows Internet Explorer

Call report

Filter Summary

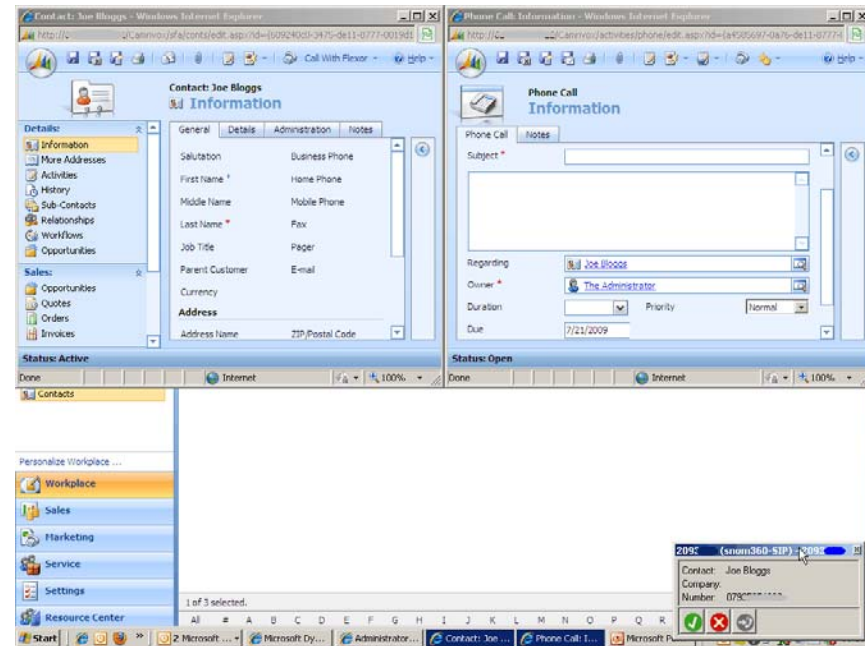
Subject	Actual End	Actual Start	Direction	Regarding
[No answer]	7/22/2009 3:56 PM	7/22/2009 3:56 PM	Outgoing	Joe Bloggs
[No answer]	7/22/2009 3:56 PM	7/22/2009 3:56 PM	Outgoing	Joe Bloggs
[No answer]	7/22/2009 3:56 PM	7/22/2009 3:56 PM	Outgoing	Joe Bloggs
[No answer]	7/22/2009 3:56 PM	7/22/2009 3:56 PM	Outgoing	Joe Bloggs
[No answer]	7/22/2009 4:12 PM	7/22/2009 4:12 PM	Outgoing	Joe Bloggs
[No answer]	7/22/2009 4:12 PM	7/22/2009 4:12 PM	Outgoing	Joe Bloggs
[No answer]	7/22/2009 4:12 PM	7/22/2009 4:12 PM	Outgoing	Joe Bloggs
[No answer]	7/22/2009 4:12 PM	7/22/2009 4:12 PM	Outgoing	Joe Bloggs
[No answer]	7/22/2009 4:12 PM	7/22/2009 4:12 PM	Outgoing	Joe Bloggs
Enquiry	7/21/2009 4:23 PM	7/21/2009 4:23 PM	Incoming	Joe Bloggs
Enquiry	7/21/2009 4:23 PM	7/21/2009 4:23 PM	Incoming	Joe Bloggs

Reporting lets you create the call activity reports you want.

Summary



- Flexor CTI for Microsoft Dynamics CRM not only delivers improved productivity through on-screen call control, but adds the vital ingredient necessary for total customer interaction, by capturing call details into customer records.



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Further help and support is available from our website at www.camrivoX.com/support or by contacting us using the details below

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