

camrivoXTM

Flexor CTI for Microsoft Dynamics CRM

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

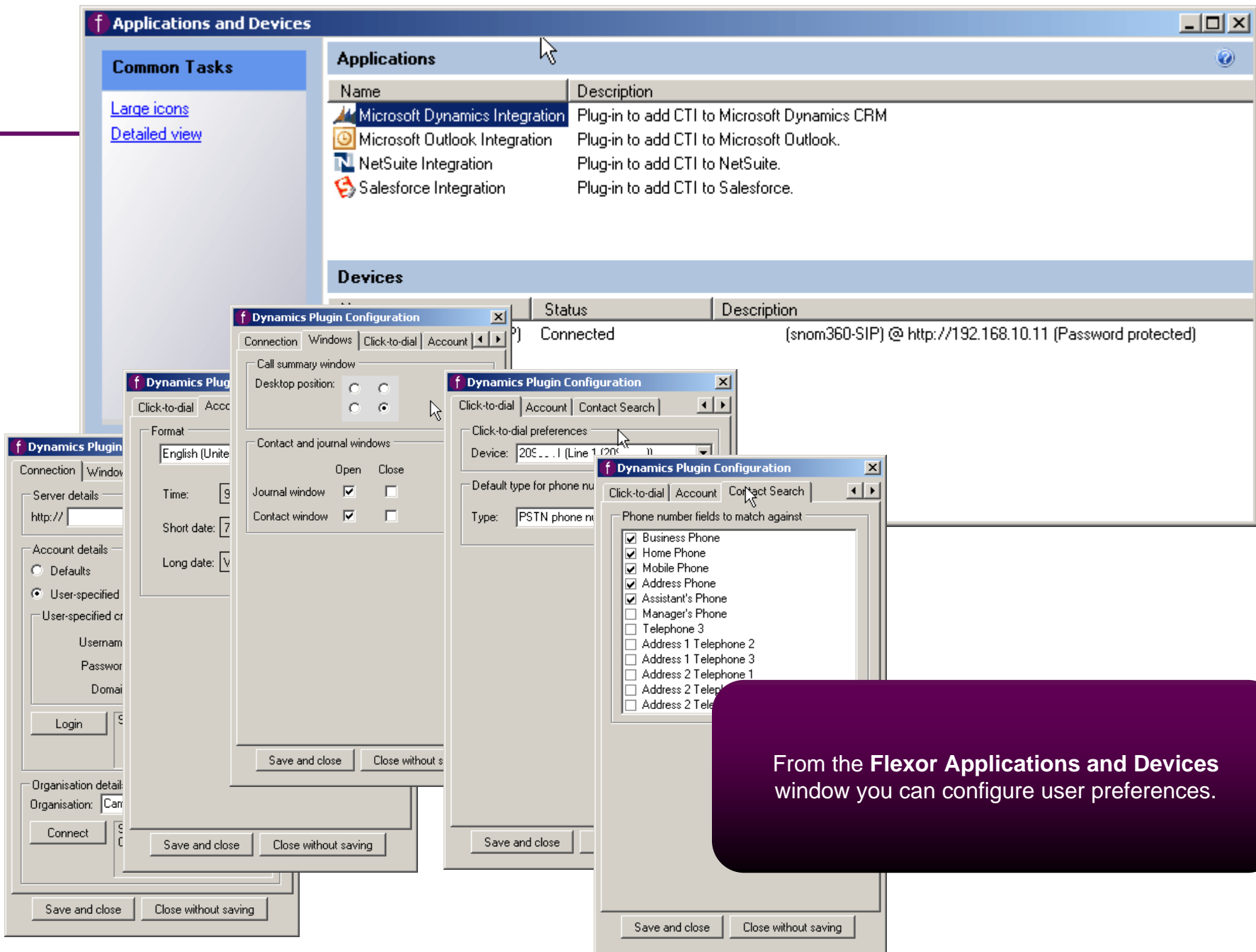
This screenshot shows the 'Contact: Joe Bloggs' page in Dynamics CRM. The 'Information' tab is active, displaying fields for General, Details, Administration, and Notes. The 'Address' section is expanded, showing fields for Address Name, Street 1, Street 2, Street 3, City, State/Province, ZIP/Postal Code, Country/Region, Phone, and Freight Terms. A 'Call With Flexor' button is visible in the top right corner.

This screenshot shows the 'Phone Call: Information' page in Dynamics CRM. The 'Information' tab is active, displaying fields for Phone Call Subject, Regarding, Owner, Duration, Priority, and Due. A 'Status: Open' indicator is visible at the bottom of the page.

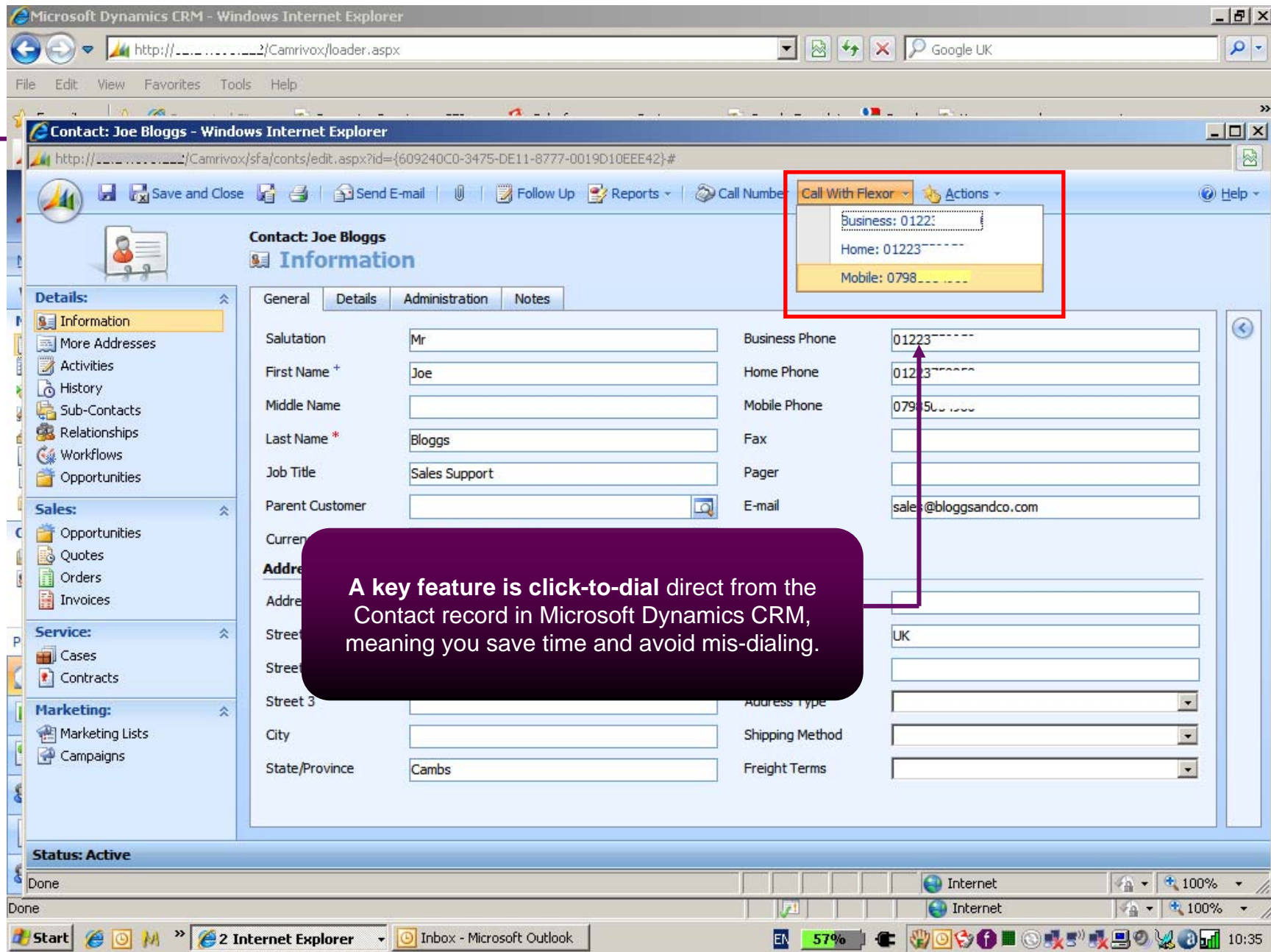
This screenshot shows the 'Contact: Joe Bloggs' page in Dynamics CRM with a 'Call With Flexor' overlay. The overlay displays contact information for Joe Bloggs, including Business, Home, and Mobile phone numbers. The background shows the full contact page with various tabs and fields.

This screenshot shows a list of phone calls in Dynamics CRM. The list includes columns for Status, Date, Time, and Duration. A tooltip is visible over one of the entries, showing contact information for Joe Bloggs.

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



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



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. The main window shows the 'Contact: Joe Bloggs' record with the 'Information' tab selected. The contact details include: Salutation, First Name (Joe), Middle Name, Last Name (Bloggs), Job Title (Sales Support), Parent Customer, Currency (Pound Sterling), and Address fields. A 'Phone Call Information' dialog box is open, showing fields for 'Subject', 'Regarding' (Joe Bloggs), and 'Owner' (The Administrator). The status is 'Open'. A call information popup in the bottom right corner displays: '2093 (snom360-SIP) - 2093341', 'Contact: Joe Bloggs', 'Company:', and 'Number: 07900001000'. A purple callout box 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.'

The screenshot displays the Microsoft Dynamics CRM interface within a Windows Internet Explorer browser. 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.'

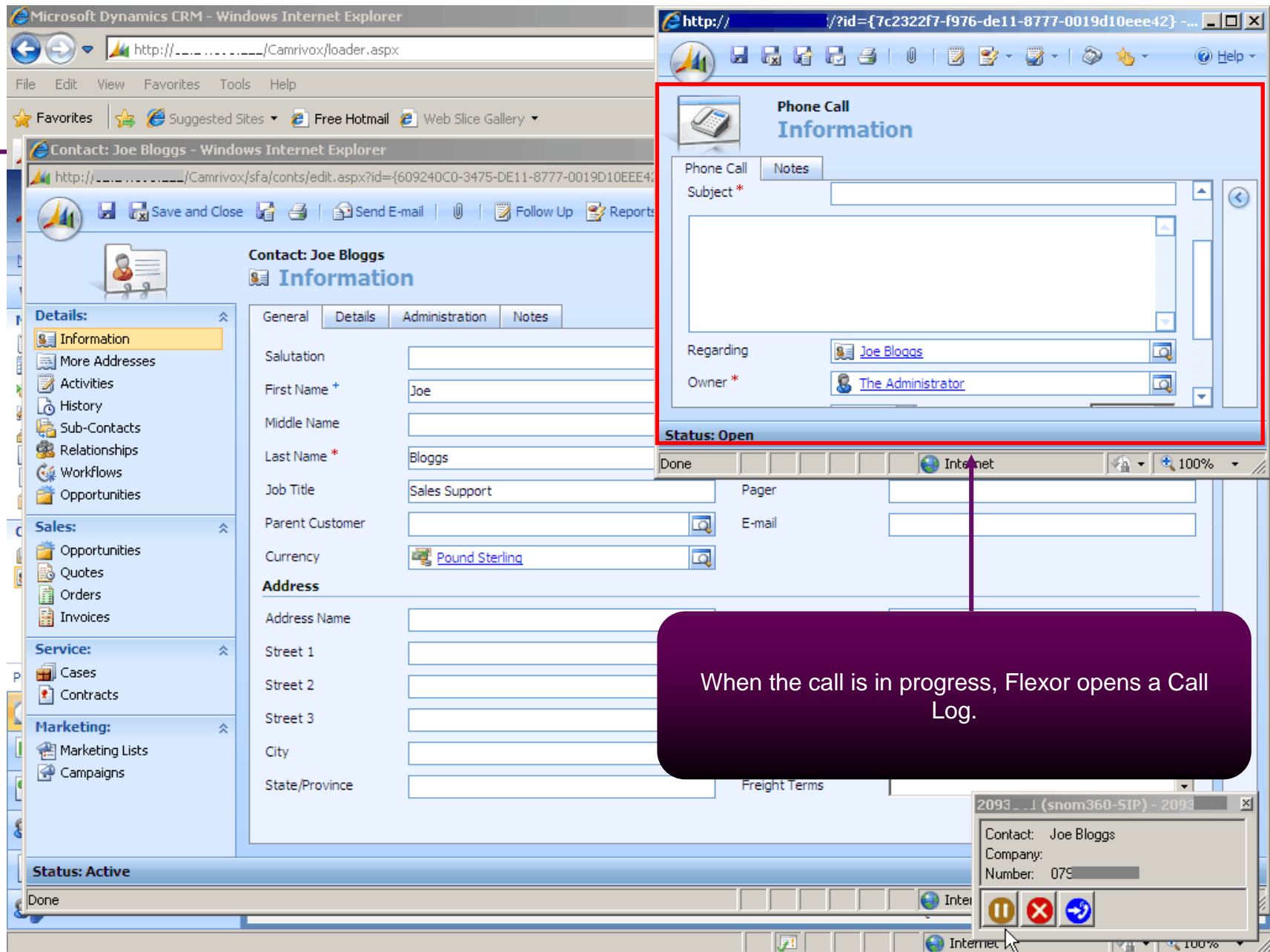
Activity Type	Subject	Regarding	Priority	Start Date	Due Date
Phone Call	[Called]	Joe Bloggs	Normal	7/21/2009 9:17 PM	7/21/2009

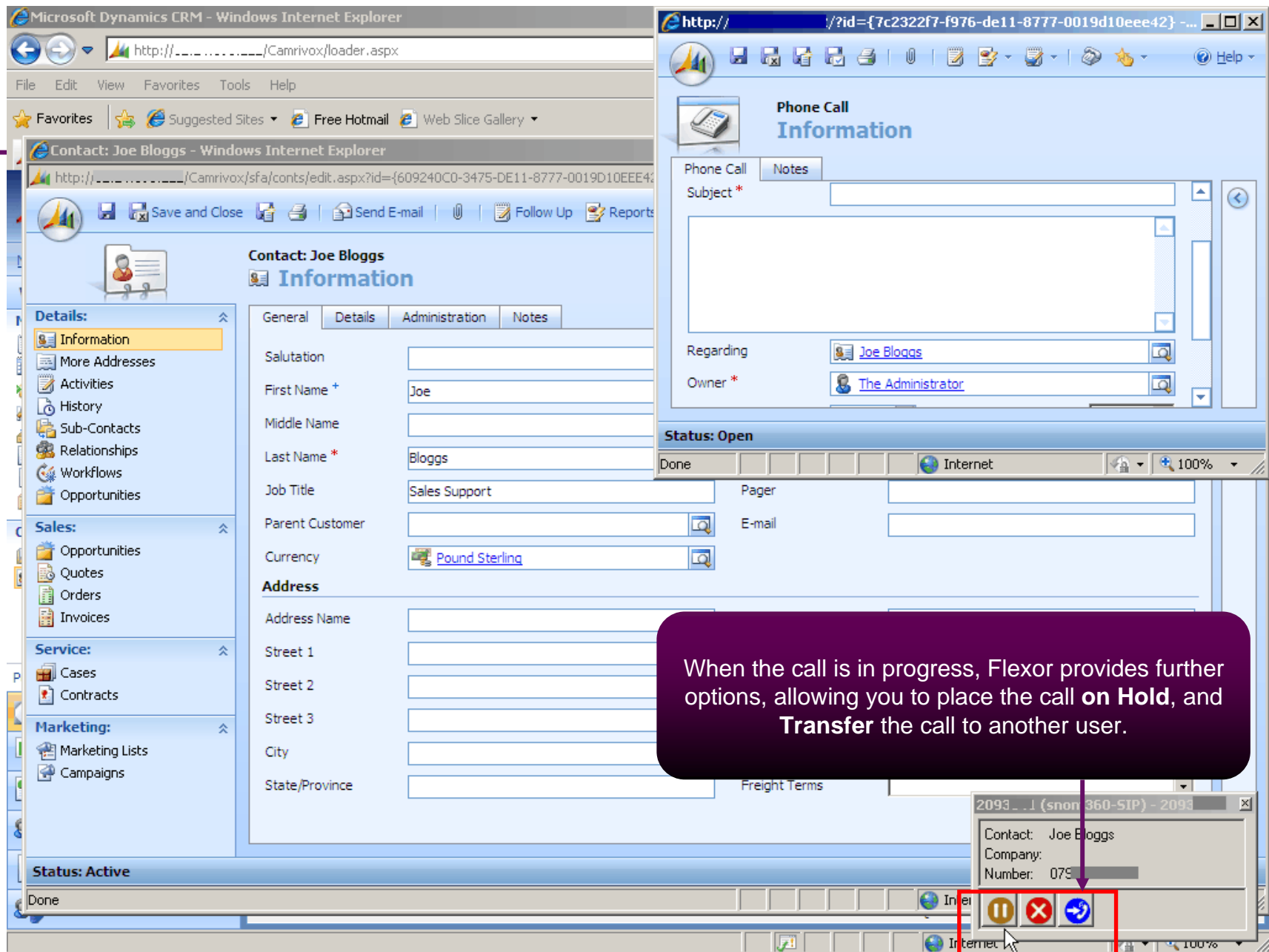
Matched contacts:

- 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 in a Windows Internet Explorer browser window. The main content area shows the 'Contact: Joe Bloggs' record under the 'Information' tab. The record details include:

- Salutation: [Empty]
- First Name: Joe
- Middle Name: [Empty]
- Last Name: Bloggs
- Job Title: Sales Support
- Parent Customer: [Empty]
- Currency: Pound Sterling
- Business Phone: 0123456789
- Home Phone: [Empty]
- Mobile Phone: C...
- Fax: [Empty]
- Pager: [Empty]
- E-mail: [Empty]

The 'Address' section contains fields for Address Name, Street 1-3, 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 lists 'Matched contacts' as 'Joe Bloggs ()', 'Daniel ()', and 'None of these'. Below this, it shows 'Contact: Several matches found' and 'Company:'. A red box highlights the 'Transfer to:' field, which is currently empty, and a mouse cursor is pointing at it.

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 contact's information page. 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. The status at the bottom is "Active".

The right window, titled "Phone Call: Information - Windows Internet Explorer", shows the phone call information page. It has tabs for "Phone Call" and "Notes". The "Phone Call" tab is active, showing a "Subject" field, a large text area for notes, and fields for "Regarding" (Joe Bloggs), "Owner" (The Administrator), "Duration", "Priority" (Normal), and "Due" (7/21/2009). The status at the bottom is "Open".

Below the browser windows is a navigation pane with "Workplace" selected, and a list of other areas: Sales, Marketing, Service, Settings, and Resource Center. At the bottom, a taskbar shows several open applications, including "Contact: Joe ..." and "Phone Call: I...".

A dark purple callout box with white text is positioned in the center, pointing to a red-bordered box in the taskbar. The callout box contains the text: "To terminate the call, click on End Call". The red-bordered box in the taskbar contains three icons: a green checkmark, a red 'X', and a circular arrow. The red 'X' icon is the "End Call" button.

To terminate the call, click on End Call

A small window titled "2093 (snom360-SIP) - 2093" is overlaid on the taskbar. It displays contact information: "Contact: Joe Bloggs", "Company:", and "Number: 0790777777". Below the text are three icons: a green checkmark, a red 'X', and a circular arrow. The red 'X' icon is highlighted with a red border, indicating it is the "End Call" button.

The screenshot displays the Microsoft Dynamics CRM interface. On the left, the navigation pane shows 'Contact: Joe Bloggs' with the 'Activities' tab selected. The main area shows a list of activities for 'Joe Bloggs' filtered for the next 30 days. The activities list includes '[Called]', '[No answer]', and 'Enquiry'. The '[No answer]' activity is selected, and its details are shown in a pop-up window. The pop-up window has a red border and contains the following information:

- Phone Call** [No answer]
- Phone Call | Notes
- Subject * [No answer]
- Regarding: Joe Bloggs
- Owner * The Administrator
- Duration: 0 minutes | Priority: Normal
- Due: 7/22/2009
- Status: Open

A callout box with a purple background and white text points to the red-bordered pop-up window. The text in the callout box reads: "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 within a Windows Internet Explorer browser. The main window shows the 'Phone Call Enquiry' form, which is highlighted with a red border. The form includes the following fields:

- Sender:** Joe Bloggs
- Recipient:** The Administrator
- Phone Number:** 07.
- Direction:** Incoming (selected), Outgoing
- Subject *:** Enquiry
- Notes:** Sales call
- Regarding:** Joe Bloggs
- Owner *:** The Administrator
- Duration:** 1 minute
- Priority:** Normal
- Due:** 7/21/2009
- Status:** Open

A purple callout box at the bottom left contains the text: "Clicking on an Activity shows how the call is **automatically captured** as a Call, with full details and notes." A purple arrow points from this callout to the 'Enquiry' activity in the 'Activities' list on the left side of the interface.

Microsoft Dynamics CRM - Windows Internet Explorer

Report: Call report - Windows Internet Explorer

Report Viewer: Call report - Windows Internet Explorer

Call report

Filter Summary

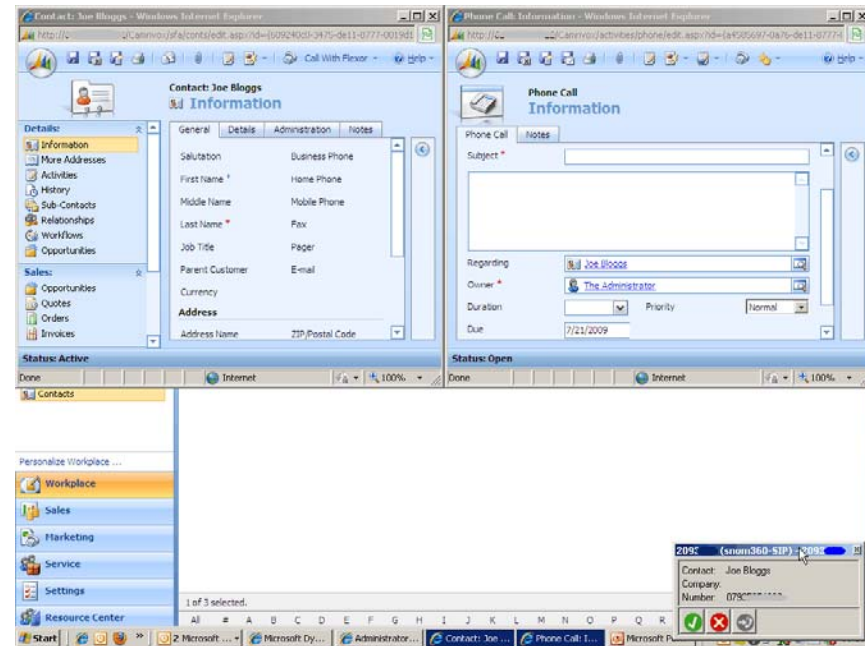
Subject	Actual End	Actual Start	Direction	Regarding
[No answer]	7/22/2009 3:56 PM	7/22/2009 3:56 PM	Outgoing	Joe Bloggs
[No answer]	7/22/2009 3:56 PM	7/22/2009 3:56 PM	Outgoing	Joe Bloggs
[No answer]	7/22/2009 3:56 PM	7/22/2009 3:56 PM	Outgoing	Joe Bloggs
[No answer]	7/22/2009 3:56 PM	7/22/2009 3:56 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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