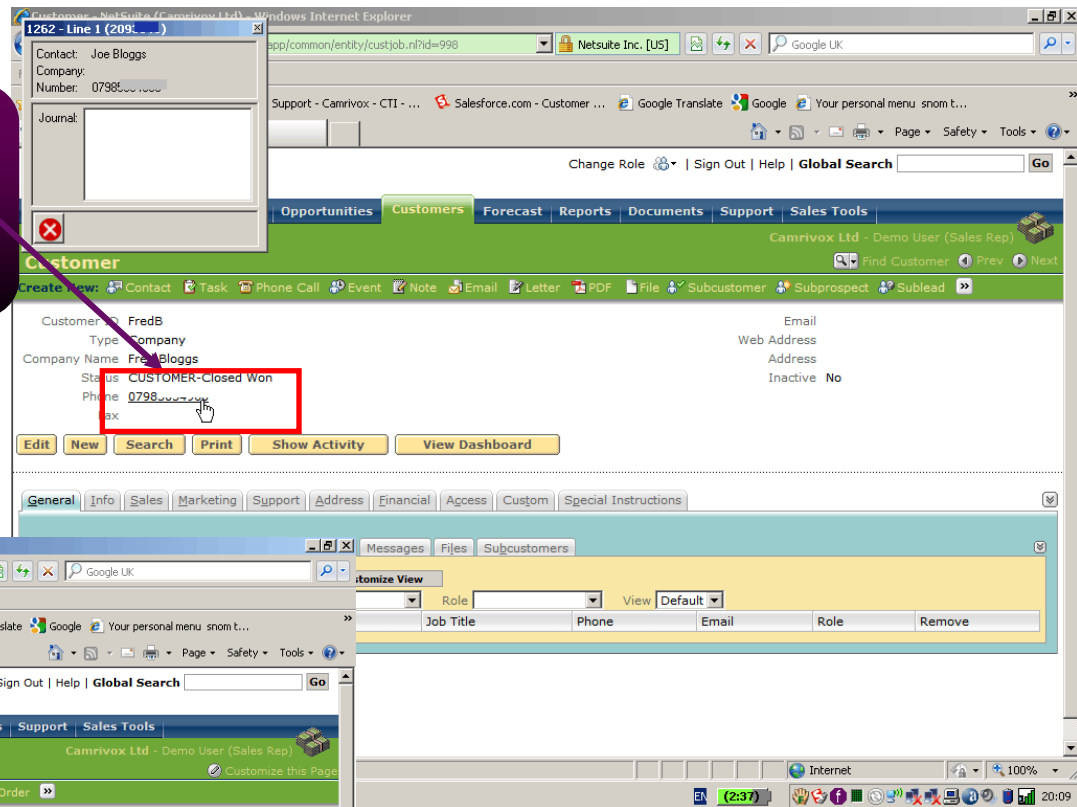


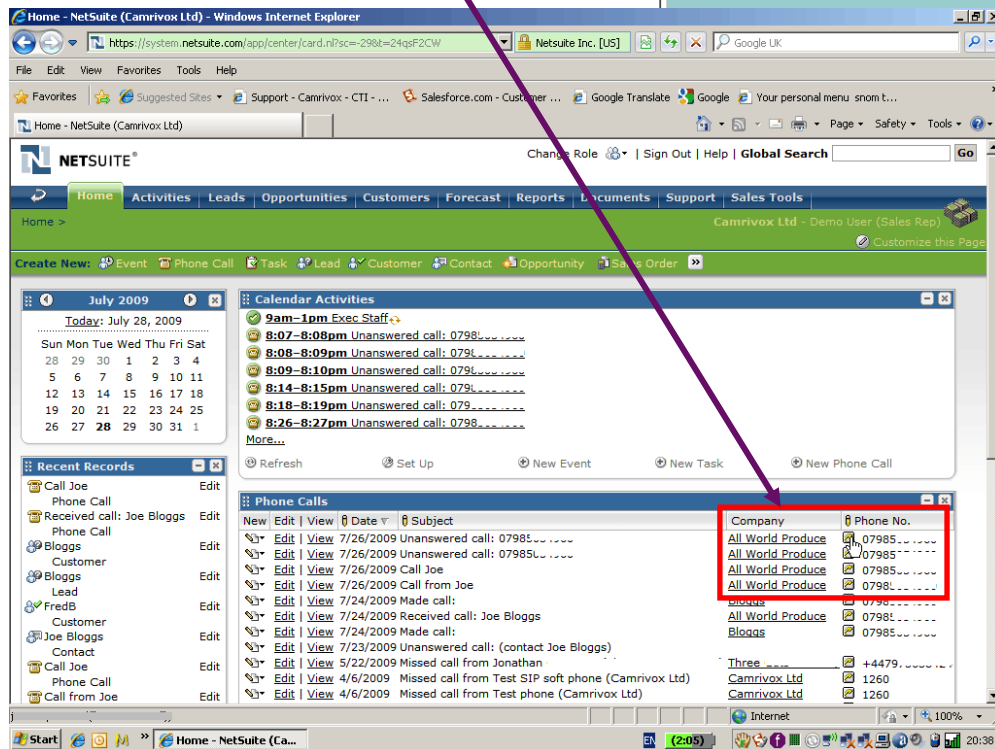
camrivoXTM

Flexor CTI for Netsuite

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



This screenshot shows a Netsuite Customer record for 'Fred Bloggs'. The status is 'CUSTOMER-Closed Won'. A red box highlights the phone number '07985...'. The interface includes a top navigation bar with 'Customers' selected, and a sidebar with various action buttons like 'Edit', 'New', 'Search', and 'Print'. A 'Flexor CTI' window is visible in the top left corner, showing a '1262 - Line 1 (209...)' with contact details for Joe Bloggs.



This screenshot shows the Netsuite Home dashboard for 'Camrivox Ltd - Demo User (Sales Rep)'. The dashboard includes a calendar for July 2009, a 'Recent Records' list, and a 'Phone Calls' table. A red box highlights the 'Phone Calls' table, which lists several calls with columns for 'Company' and 'Phone No.'. A purple arrow points from the text box to the 'Phone Calls' table.

Company	Phone No.
All World Produce	07985...
All World Produce	07985...
All World Produce	07985...
All World Produce	07985...
Three	+4479...
Camrivox Ltd	1260
Camrivox Ltd	1260

The screenshot displays the Flexor Applications and Devices window and three overlapping configuration dialog boxes for CamrivoX Flexor NetSuite.

Applications and Devices Window:

- Common Tasks:** [Large icons](#), [Detailed view](#)
- Applications:**

Name	Description
Microsoft Dynamics Integration	Plug-in to add CTI to Microsoft Dynamics
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.
- Devices:**

Name	Status	Description
209 (snom360-SIP)	Connected	209: (snom360-SIP) @ http://192.168.10.11 [Password protected]

CamrivoX Flexor NetSuite Configuration Dialogs:

- Dialog 1 (Record types to search):**

Record type	Checked
Contact	<input checked="" type="checkbox"/>
Customer	<input checked="" type="checkbox"/>
Employee	<input checked="" type="checkbox"/>
Lead	<input checked="" type="checkbox"/>
Partner	<input checked="" type="checkbox"/>
Vendor	<input checked="" type="checkbox"/>
- Dialog 2 (Call summary window):**
 - Call summary window: Enabled
 - Desktop position: (left), (right)
- Dialog 3 (Number Matched To Contact):**
 - Open contact window: When call is answered
 - Close contact window: When call ends
 - Open contact form in new window
 - Number Not Matched: Using Call Summary button
 - Open new contact form in new window
- Dialog 4 (Journaling of calls):**
 - Enable journaling of calls
 - Journal record type: Phone Call, User Note
 - Open journal window: When call is answered
 - Close journal window: When call ends
 - Open journal in new window

The Windows taskbar at the bottom shows the Start button and several open applications: **Inbox - Microsoft ...**, **Home - NetSuite (...)**, **Microsoft PowerPo...**, and **2 FlexorMar**.

From the Flexor Applications and Devices window you can configure record types to search and other user preferences.

The screenshot shows a web browser window displaying a CRM interface. A contact record for 'Joe Bloggs' is shown, with fields for 'Main Phone' (07985...) and 'Fax'. A red box highlights the 'Main Phone' field, and a purple arrow points from a callout box to it. The interface includes a navigation menu with 'Customers' selected, and a 'Show Activity' button. A callout box in the bottom left corner contains the text: 'A key feature is click-to-dial direct from the Contact detail, meaning you save time and avoid mis-dialing.'

The screenshot shows a NetSuite CRM interface in a Windows Internet Explorer browser. The main window displays a customer record for "Fred Bloggs" with the status "CUSTOMER-Closed Won". The phone number "0798..." is highlighted with a red box and a hand cursor. Below the record are buttons for "Edit", "New", "Search", "Print", "Show Activity", and "View Dashboard". A "Contacts" section is visible below, with a table of contacts. A purple callout box at the bottom contains the text: "Click-to-dial is also available directly from Customer records."

Customer ID FredB
Type Company
Company Name Fred Bloggs
Status CUSTOMER-Closed Won
Phone 0798...
Fax

Buttons: Edit, New, Search, Print, Show Activity, View Dashboard

Contacts Section: New Contact, Attach, Update Primary, Customize View

Edit	Name	Company	Job Title	Phone	Email	Role	Remove
------	------	---------	-----------	-------	-------	------	--------

Click-to-dial is also available directly from Customer records.

The screenshot displays the NetSuite CRM interface for a Lead record. The browser window title is "Lead - NetSuite (Camrivox Ltd) - Windows Internet Explorer". The URL is "app/common/entity/custjob.nl?id=1003". The page header includes "Support - Camrivox - CTI - ...", "Salesforce.com - Customer ...", "Google Translate", "Google", and "Your personal menu snom t...". The main navigation bar contains "Opportunities", "Customers", "Forecast", "Reports", "Documents", "Support", and "Sales Tools". The user is identified as "Camrivox Ltd - Demo User (Sales Rep)".

The Lead record details are as follows:

- Customer ID: Bloggs
- Type: Company
- Company Name: Bloggs
- Status: LEAD-New
- Phone: 0798... (highlighted in red)
- Fax: (empty)
- Email: (empty)
- Web Address: (empty)
- Address: (empty)
- Inactive: No

Buttons available for the record include "Edit", "New", "Search", "Print", "Show Activity", and "View Dashboard". The "Print" button is highlighted with a red box and a mouse cursor. A callout box points to the "Print" button with the text: "Click-to-dial is also available directly from Lead records."

The interface also shows tabs for "General", "Info", "Sales", "Marketing", "Support", "Address", "Financial", "Access", "Custom", and "Special Instructions". Below these are tabs for "Contacts", "Activities", "User Notes", "System Notes", "Messages", "Files", and "Subcustomers". A table below the tabs shows a list of contacts with columns for "Contact", "Role", "Phone", "Email", "Role", and "Remove".

Contact: Joe Bloggs
Company: All World Produce
Main Phone: 0798L.....
Name: Joe Bloggs

Job Title: _____
Address: _____
Private: No
Inactive: No

Buttons: Edit, New, Print, Show Activity

Call Action: ✖

Callout: 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.

Company	Type	Notes	Email	Phone	Role	Remove
All World Produce	Customer					Remove

The screenshot displays the NetSuite CRM interface in Internet Explorer. A 'Matched contacts' dialog box is open, listing 'Contact: Joe Bloggs ()' and 'Customer: (Fred Bloggs)'. Below it, a 'Lead' card for 'All World Produce' is visible. A 'Phone Calls' table lists various call records. A 'Key Performance Indicators' table is also present.

Indicator	Period	Current	Previous	Change
My New Leads	This Week vs Last Week to Date	0	0	0.0%
My Total Open Opportunities	Today vs One Month Ago	20	20	0.0%
My Quota	This Month vs Last Month	\$0	\$0	0.0%
My Pipeline (Projected)	This Month	\$0		
My Forecast	This Month	\$0		
My Sales	This Month To Date vs Last Month to Date	\$0	\$0	0.0%
My Estimated Commission	This Month To Date	\$0		
My Authorized Commission	This Month To Date	\$0		

	Company	Phone No.
7/26/2009 Unanswered call: 0798	All World Produce	0798
7/26/2009 Unanswered call: 0798	All World Produce	0798
7/26/2009 Call Joe	All World Produce	0798
7/26/2009 Call from Joe	All World Produce	0798
7/24/2009 Made call:	Bloggs	0798
7/24/2009 Received call: Joe Bloggs	All World Produce	0798
7/24/2009 Made call:	Bloggs	0798
7/23/2009 Unanswered call: (contact Joe Bloggs)		
5/22/2009 Missed call from Jonathan	Three	+447
4/6/2009 Missed call from Test SIP soft phone (Camrivox Ltd)	Camrivox Ltd	1260
4/6/2009 Missed call from Test phone (Camrivox Ltd)	Camrivox Ltd	1260
4/6/2009 Missed call from Test phone (Camrivox Ltd)	Camrivox Ltd	1260
4/6/2009 Made call to Test phone (Camrivox Ltd)	Camrivox Ltd	1260
3/30/2009 Called Test phone (Camrivox Ltd): No answer	Camrivox Ltd	1260
3/30/2009 Called Test phone (Camrivox Ltd): No answer	Camrivox Ltd	1260

If an incoming call is associated with multiple existing records, Flexor offers a choice of contact to open.

In the event of an incoming call, Flexor provides the option to Answer or Reject the call.

When the call is in progress Flexor opens a call log.

Log Phone Call - Windows Internet Explorer
https://system.netsuite.com/app/crm/calendar/call.nl?status=COMPLETE&T=8

Log Phone Call

Subject: Received call: Joe Bloggs
Organizer: Demo User
Date Completed: 7/24/2009
Phone Number: 0798L.....
Reserve Time:
Status: Completed
Private Phone Call:

From: 10:10 PM - 11:00 pm
To: 12:00 am

Notes: In

Save Reset Cancel

Related Info: Participants Notes Files
Company: All World Produce Support Case

Windows Taskbar: Start | Lead - NetSuite (Camrivo... | Log Phone Call - Wind... | Contact - NetSuite (Cam... | 22:10

The screenshot displays the NetSuite CRM interface. A call control popup is visible in the top left, containing three icons: a pause icon (Hold), a red X icon (End Call), and a circular arrow icon (Transfer). A red box highlights these icons, with a purple arrow pointing to a text box. The text box contains the following text:

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 main interface shows a 'Contact' record for Joe Bloggs, with fields for Name, Company (All World Produce), and Main Phone (07985...). Below this, a 'Log Phone Call' form is open, with the following fields:

- Subject: Received call: Joe Bloggs
- Organizer: Demo User
- Date Completed: 7/24/2009
- Phone Number: 0798L.....
- Reserve Time:
- Status: Completed
- From: 10:10 PM to 11:00 pm
- To: [empty] to 12:00 am
- Private Phone Call:
- Notes: In

Buttons for 'Save', 'Reset', and 'Cancel' are visible below the notes field. The bottom of the screen shows the Windows taskbar with the Start button and several open applications: 'Lead - NetSuite (Camrivo...', 'Log Phone Call - Wind...', and 'Contact - NetSuite (Cam...'.

2093...1 (snom360-SIP) - 209

Contact:
Company: Bloggs
Number: 0798E

ite.com/app/common/entity/custjob.nl?id=1003

Change Role | Sign Out | Help | Global Search

Support Sales Tools

Lead

Create New: Contact

Customer ID Bloggs
Type Company
Company Name Bloggs
Status LEAD-New
Phone 0798E

Log Phone Call - Windows Internet Explorer

https://system.netsuite.com/app/crm/calendar/call.nl?status=COMPLETE&T&comp

Log Phone Call

Subject Made call: Date Completed 7/24/2009
Organizer Demo User Phone Number 0798E
Reserve Time Status Completed
From 10:08 PM 11:00 pm
To 12:00 am
Private Phone Call

Notes Hold

Save Reset Cancel

Related Info Participants Notes Files

Company Bloggs Support Case

Start | Lead - NetSuite (Camrivo...) | Log Phone Call - Wind... | Lead - NetSuite (Camrivo...)

22:09

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 NetSuite CRM interface. In the background, a 'Transfer to:' dialog box is open, showing the number '1234' entered in the destination field. A red box highlights this field and the 'Initiate Transfer' (green play icon) and 'Cancel Transfer' (red X icon) buttons. A purple callout box points to the 'Initiate Transfer' button with the text: "To Transfer a call is equally simple. Enter the destination number, after which you either **Initiate Transfer** or **Cancel Transfer**".

In the foreground, the 'Log Phone Call' window is open, showing a call log entry for a transfer. The call log entry includes the following details:

- Subject: Made call:
- Organizer: Demo User
- Date Completed: 7/24/2009
- Phone Number: 0798.....
- Reserve Time:
- Status: Completed
- From: 10:08 PM to 11:00 pm
- To: 12:00 am
- Private Phone Call:
- Notes: Transfer

The call log entry is saved, and the 'Log Phone Call' window shows the 'Save' button highlighted. The background interface shows a 'Lead' record for 'Bloggs' with a phone number of '07985331999'.

The screenshot displays a NetSuite CRM interface. In the background, a 'Lead' record for 'Bloggs' is visible with fields for Customer ID, Type, Company Name, Status, and Phone. A 'Log Phone Call' form is open in the foreground, with the following details:

- Subject: Made call:
- Organizer: Demo User
- Date Completed: 7/24/2009
- Phone Number: 0798-.....
- Reserve Time:
- Status: Completed
- From: 10:08 PM to 11:00 pm
- To: [blank] to 12:00 am
- Private Phone Call:
- Notes: Call

A purple callout box with the text "To terminate the call, click on End Call" points to a red 'X' icon in a contact information pop-up window. The pop-up window shows contact details for 'Bloggs' and includes a red 'X' icon, a blue circular arrow icon, and a green checkmark icon.

When the call has ended, the **Call Log** remains open to add or edit comments.

Log Phone Call

Subject: Made call: Date Completed: 7/24/2009
Organizer: Demo User Phone Number: 0798L.....
Reserve Time: Status: Completed
From: 10:04 PM - 11:00 pm
To: 10:06 PM - 12:00 am Private Phone Call:

Notes: Remains open

Buttons: Save, Reset, Cancel

Related Info: Participants, Notes, Files

Company: Bloggs Support Case: [dropdown]

Home - NetSuite (Camrivo Ltd) - Windows Internet Explorer

https://system.netsuite.com/app/center/card.nl?sc=-298t=24qsF2CW

File Edit View Favorites Tools Help

Home - NetSuite (Camrivo Ltd)

NETSUITE® Change Role | Sign Out | Help | Global Search

Home Activities Leads Opportunities Customers Forecast Reports Documents Support Sales Tools

Home > Camrivo Ltd - Demo User (Sales Rep)

Create New: Event Phone Call Task Lead Customer Contact Opportunity Sales Order

July 2009 Today: July 28, 2009

Calendar Activities

- 9am-1pm Exec Staff
- 8:07-8:08pm Unanswered call: 0798...
- 8:08-8:09pm Unanswered call: 079...
- 8:09-8:10pm Unanswered call: 079...
- 8:14-8:15pm Unanswered call: 079...
- 8:18-8:19pm Unanswered call: 079...
- 8:26-8:27pm Unanswered call: 0798...

Recent Records

- Call Joe
- Received call: Joe Bloggs
- Bloggs
- FredB
- Joe Bloggs
- Call Joe
- Call from Joe

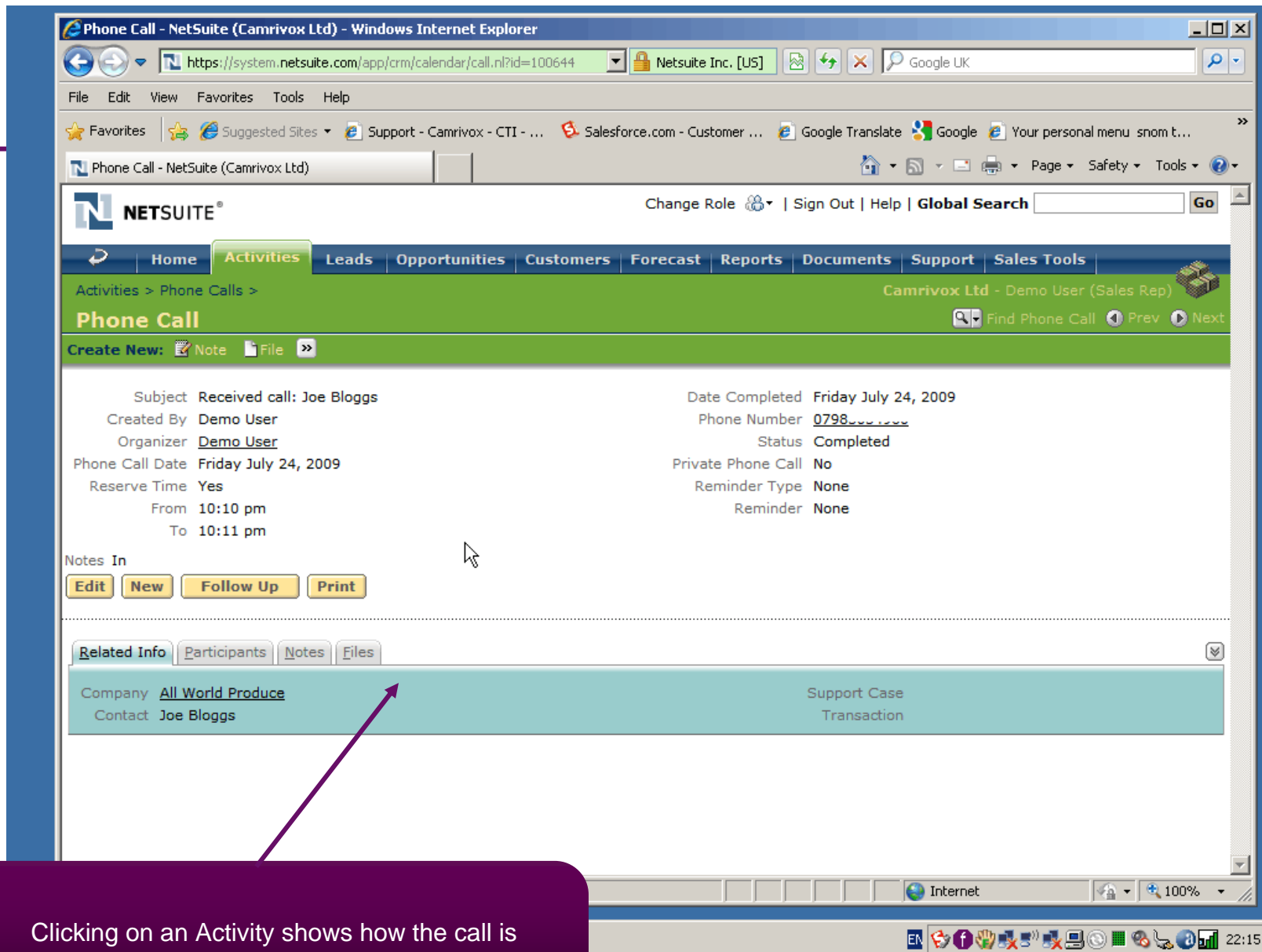
Activity History

All calls made or received are recorded in Activity History.

Company	Phone No.
World Produce	07985...
World Produce	07985...
World Produce	07985...
World Produce	0798...
Bloggs	0798...
All World Produce	0798...
Bloggs	07985...
Three	+4479...
Camrivo Ltd	1260
Camrivo Ltd	1260

Internet 100%

Start Home - NetSuite (Ca... (2:05) 20:38



Clicking on an Activity shows how the call is **automatically captured** as a Call, with full details and notes.

Phone Calls - NetSuite (Camrivox Ltd) - Windows Internet Explorer

https://system.netsuite.com/app/crm/calendar/calllist.nl?searchid=208

File Edit View Favorites Tools Help

Phone Calls - NetSuite (Camrivox Ltd)

NETSUITE® Change Role | Sign Out | Help | Global Search

Home **Activities** Leads Opportunities Customers Forecast Reports Documents Support Sales Tools

Activities > Camrivox Ltd - Demo User (Sales Rep)

Phone Calls [Enable Editing](#) Search Audit Trail Add To Shortcuts

Edit	View	Date	Subject	Company	Phone No.
Edit	View	7/24/2009	Made call:	Bloggs	0798...
Edit	View	7/24/2009	Received call: Joe Bloggs	All World Produce	0798...
Edit	View	7/24/2009	Made call:	Bloggs	0798:
Edit	View	7/23/2009	Unanswered call: 0798: (contact Joe Bloggs)		
Edit	View	5/22/2009	Missed call from Jonathar		+44797...
Edit	View	4/6/2009	Missed call from Test SIP soft phone (Camrivox Ltd)	Camrivox Ltd	1260
Edit	View	4/6/2009	Missed call from Test phone (Camrivox Ltd)	Camrivox Ltd	1260
Edit	View	4/6/2009	Missed call from Test phone (Camrivox Ltd)	Camrivox Ltd	1260
Edit	View	4/6/2009	Made call to Test phone (Camrivox Ltd)	Camrivox Ltd	1260
Edit	View	3/30/2009	Called Test phone (Camrivox Ltd): No answer		
Edit	View	3/30/2009	Called Test phone (Camrivox Ltd): No answer		
Edit	View	3/30/2009	Called Test phone (Camrivox Ltd): No answer		
Edit	View	3/30/2009	Called Test phone (Camrivox Ltd): No answer		
Edit	View	3/30/2009	Called Test phone (Camrivox Ltd): No answer		
Edit	View	3/30/2009	Called Test phone (Camrivox Ltd): No answer		
Edit	View	3/30/2009	Called Test phone (Camrivox Ltd): No answer		
Edit	View	3/30/2009	Called Test phone (Camrivox Ltd): No answer		
Edit	View	3/30/2009	Called Test phone (Camrivox Ltd): No answer		

Organizer: - All - Status: Completed From-To: 7/24/2009 - 3/3/2009 Total Found: 503

Style: Normal View: Phone Calls To Complete Quick Sort: [Dropdown] [New] [Print] [Edit View] [Export - CSV]

Internet 100%

Start Phone Calls - NetSuite...

EN Facebook Twitter LinkedIn YouTube RSS

22:25

All call activity is logged and available for Reporting.

Custom Sales Activity Detail - NetSuite (Camrivox Ltd) - Windows Internet Explorer

https://system.netsuite.com/app/reporting/reportrunner.nl?reportacti Netsuite Inc. [US]

File Edit View Favorites Tools Help

Custom Sales Activity Detail - NetSuite (Camrivox Ltd)

NETSUITE® Change Role | Sign Out | Help | Global Search

Home Activities Transactions Lists **Reports** Documents Setup Support Sales Tools Knowledge Base

Reports > Camrivox Ltd - Demo User (Administrator)

Custom Sales Activity Detail

Account Number	Date	Activity Count	Customer Name	Contact: Phone	Memo
- Unassigned -					
Call	7/24/2009	1	Bloggs		Call notes
Call	7/24/2009	1	All World Produce	0798!	In
Call	7/23/2009	1	All World Produce	0798!	Interested in Netsuite integration
Call	7/24/2009	1	Bloggs		Transfer
Call	7/24/2009	1	Bloggs		
Total - Unassigned -		5			
Total		5			

Date: this week From: 7/19/2009 To: 7/25/2009 Find: <Type then tab> Next Prev

Refresh Return To Customization Options Print Email Export - CSV

Done Internet 100%

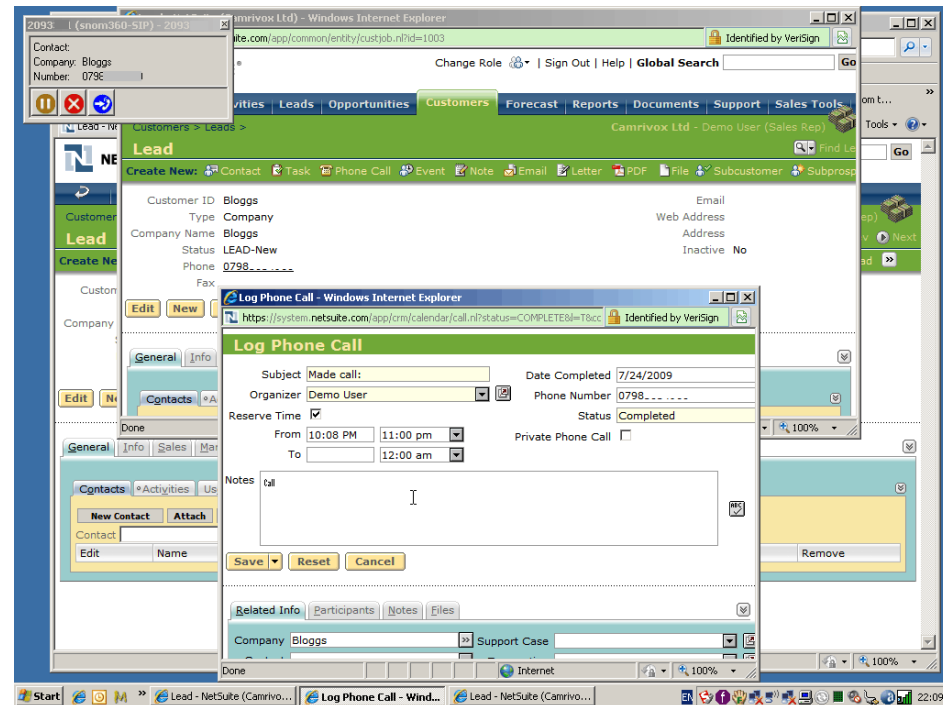
Start Custom Sales Activity...

Reporting in your CRM application lets you create the call activity reports you want.

Summary



- Flexor CTI for Netsuite 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.



camrivoXTM

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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