



## Evolve IP CRM Integration

The Evolve IP hosted IP Phone System integrates with many leading CRMs and business applications, such as Microsoft Dynamics, Sugar, ACT!, Sage, Netsuite, ConnectWise and more. Deliver the true promise of unified communications by providing end-users valuable features right within the applications they use daily.

### ☁ WHY CRM CONNECT?

Integration between the Evolve IP hosted phone system and your business applications ensures dramatic productivity gains for your users, while working in the office or remote. When you integrate your telephone system with your customer records, CRM Integration provides easy-to-use experiences for your users. Make better use of time speaking with valuable prospects and customers, rather than looking up contact and account information manually in your CRM. Inbound calls can automatically open contact information in your CRM. Users have the ability to click-to-dial from CRM records, active call handling, enterprise directory phone presence and much more.

**act!**

eAgent

ConnectWise

NETSUITE

Sage 50

EGROUPWARE  
MAKING BUSINESS SMARTER

GoldMine.

Maximizer  
Simply Successful CRM

salesforce

saleslog!x

Access

Microsoft Dynamics CRM

Microsoft Dynamics NAV

SuperOffice.

vtiger

sage

SUGARCRM

ZOHO  
Work · Online

XING

MORE >>

## **Features**

- Work from within your organization's desired CRM application deployed (or Lotus Notes).
- Click-to-Dial from CRM applications and Web Pages in Internet Explorer and Firefox
- Inbound screen pop; Caller ID lookup in CRM
- Automatically pop CRM contact record on incoming call
- Click and transition into CRM contact record
- Real-Time Phone Presence
- Call Control
  - Answer
  - Hold
  - Transfer
  - Hangup
- Access to Call Forwarding and Do Not Disturb settings
- Access to Call History
- Phone presence inside MS Lync (both Enterprise clients and Office 365)

## **Benefits**

- Provides information about callers quickly and efficiently
- Drastically reduces time to lookup inbound caller information in the CRM
- Launches automatically when users start their machines
- Enables configuration of the application based on user preferences
- Provides phone status of users within your organization (available for a call or already on a call)
- Allows end users to work more collaboratively and collectively