

Easy CRM or ERP popup

Generate a Line of Business integration with your Teams voice or phone system. This integration will provide a CRM or ERP customer contact card pop-up when receiving an incoming PSTN call within Teams.

With Communicativ's CallApp for Microsoft Teams we provide a Line of Business integration within the Teams voice or phone system environment. This application can be used for all Teams phone system users to have a customer contact card pop-up when receiving an incoming (PSTN) call within Teams. We support every CRM or ERP platform with html look-up. We also offer within the same application a more advanced integration with Dynamics, Zendesk, Salesforce and SAP C4C.

You can set for different user groups or departments your specific CRM or ERP destination. For example your sales department is setup with a connection towards Salesforce, ICT-Service desk with ServiceNow and facility with TopDesk. We support multiple database connections an locations.

Implementation time: 1 Day

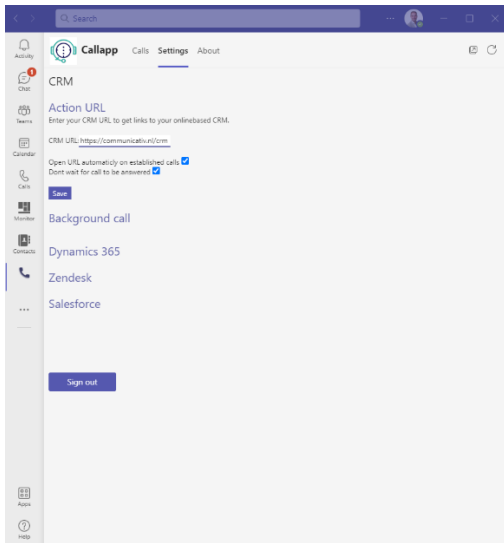
The screenshot displays a CRM dashboard for a user named Steve Jones. The interface includes a search bar, navigation tabs for Sales Dashboard, Customer Dashboard, and CRM Hub, and a user profile for Steve Jones. The main content area is divided into several sections:

- Customer Details:** Profile for Terasa Lisbon, 1607, 23rd Street NW, Washington, DC 20008, 415-767-3454 / 415-767-3455. Strategy: Grow, Loyalty: Gold.
- Activity:** A line graph showing 'Total Outstanding' of \$1.45,000K. The graph compares 'Current Year' (blue line) and 'Previous Year' (grey line) activity from January to December. The Y-axis ranges from 500 to 2.5 K.
- Opportunity:** A summary showing 70 Active, 35 In Progress, 64 Won, and 22 Lost opportunities. Below are three opportunity descriptions with their respective values:

Opportunity Description 1	\$ 550,000.00
Opportunity Description 2	\$ 150,000.00
Opportunity Description 3	\$ 100,000.00
- Collaborate:** A list of activities including 'Onsite Meeting with Presidio' and 'Talk about pricing'.
- Contacts:** A list of contact cards for Patrick Jane, Grace Van Pelt, Smith Anderson, and Sadie Maxwell.

A floating call window is visible in the bottom right corner, showing a call from +31 6 4540 Eric Hartink.

Easy setup:



Timeline insights of the caller:

