

# CRM Integration

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The Evolve IP hosted phone platform seamlessly integrates with many leading CRM and business applications, such as Salesforce, MS Dynamics, Zendesk and more. Businesses can deliver the true promise of unified communications by providing end-users valuable features right within the applications they use daily.

Capture 100% of customer interactions, increase connection rates by 30% and enhance customer experience with this CRM integration application\*

\*Source: TenFold

## Featured CRM Integrations



According to Gartner, the Customer Relationship Management (CRM) market is drastically increasing. Using an application that integrates your phone system with your CRM and business applications allows you to improve efficiency of calls, save time and increase customer satisfaction.

### Why Evolve IP's CRM Integration?

Evolve IP's CRM integration application offers unified communication features for customers that utilize several different CRM and business applications such as Salesforce, MS Dynamics, etc.

Integration between the Evolve IP hosted voice platform and your business applications ensures dramatic productivity gains for your users, while working in the office or remotely. When you bridge the gap between your telephone system and your customer records, CRM integration provides easy-to-use experiences for your users. It provides immediate access to your database with a single click.

Make better use of time speaking with valuable prospects and customers, rather than looking up contact and account information manually in your CRM. Inbound and outbound calls can automatically open contact information in your CRM. Users are also provided the ability to click-to-dial from CRM records, control their phone from their CRM, automatic call logging and much more.

### Benefits:




- Seamless integration with Evolve IP's phone system
- Ability to automatically capture every interaction with prospects & customers
- Save time looking for contact details, logging account information, or navigating to your CRM application manually
- Free of any hardware or software maintenance
- Automatically receive enhancements & updates remotely without the need of an IT admin
- Fast and easy deployment with a Chrome add-in extension
- Advanced custom options available for Salesforce
- Allows end users to work more collaboratively and collectively
- Enhances team efficiency and customer satisfaction

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## INCLUDED USER BUNDLES

	CRM CONNECTOR*	CRM PRO CONNECTOR	CUSTOM CONNECTOR
			
Click to Dial on all Chrome pages	✓	✓	✓
Caller info pops on Inbound/Outbound Calls	✓	✓	✓
Activity History Shown in the Popup	✓	✓	✓
Automatic Call Logging to CRM	✓	✓	✓
Create New Records on No Match Found	✓	✓	✓
Add New Number to Existing Contact	✓	✓	✓
Easy Task Creation through Natural Language	✓	✓	✓
Send Call Wrap Up Emails Using @mention	✓	✓	✓
Call Analytics Dashboard		✓	✓
Gamification of Call Activity		✓	✓
Email Template Integration		✓	✓
Create New Opportunities, Cases and Tickets		✓	✓
Relate Calls to Opportunities, Cases and Tickets		✓	✓
Assign Follow up Tasks to Team Members			✓
Match and Create on Custom CRM Modules			✓
Custom Field Data in Popup			✓
Ability to update Lead Status on Call			✓
Set Call Dispositions			✓
Link to Call Recording in CRM Log			✓
Enhanced Analytics/Gamification			✓
Leads Slipping Away Notification Emails			✓
Lead SLA Reporting			✓
Ability to Launch Online Video Meetings from Popup			✓
Social Profile Integration			✓
Track Lead Source by Phone Number Called			✓
Automatically Call Next Prospect From Prioritized Lists			✓
TimezoneIQ - Prioritize Dialer List by best contact			✓

\*Package included in UC User Bundle