



# CRM Connector

MOMENTUM

## THE NEXT GENERATION OF COMPUTER TELEPHONY & CRM INTEGRATION

Introducing Momentum's CRM Connector Solution: Seamlessly Uniting Cloud-Based Voice and hundreds of CRM Applications

In today's fast-paced business landscape, effective communication and data management are the cornerstones of success. Momentum's CRM Connector Solution empowers businesses to achieve just that by seamlessly integrating their cloud-based voice solutions with an extensive array of over 300+ CRM applications. This innovative, all-in-one solution opens the door to a new era of efficiency, productivity, and customer engagement.

### CRM Connector features include:



Contact Searching



Contact Popping



Caller Preview



Click-to-dial



Activity Logging\*



Add Contact / Account

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# STANDARD INTEGRATIONS

80+ CRM integrations and business system applications are classified as STANDARD for Go Integrator. Integration features will vary by CRM. Use our CRM Viewer to see a full list of integrations and check the features supported by the PC client, Mac client or both.

**STANDARD** integrations available (for PC version) “out-of-the-box” include:

- 4me
- Accelerate
- Access Microsoft
- Access Profile
- ACT!
- Autotask PSA
- Call Connect GP (Patient Connect)
- Carerix
- ConnectWise Manage
- DATEV
- Dezrez
- Dynamics 365 Customer Engagement
- Dynamics CRM
- eGroupware
- Envoy Taxi Dispatch System
- Exact Online
- Flexkids
- Goldmine
- Google Contacts
- HaloITSM
- HaloPSA
- Halo Service Desk
- HubSpot
- IBM Notes
- in2crm
- intelli-CTi
- JobDiva
- Keap Max Classic
- LDAP
- Logical Office
- Maximizer
- MobileMax
- NetSuite
- ODBC
- OnContact CRM
- Outlook
- PCHomes
- PerfectView Online CRM
- PVC CRM
- Really Simple Systems
- Rezi
- RobinHQ
- RPM
- Sage 50c
- Sage 200 with Sage CRM module
- Sage CRM 2018 R3
- Saleslogix
- Salesforce
- Salesforce Service Cloud
- Salos AutomaaT GO
- Simpicate
- SIS
- Sugar CRM
- SuperOffice
- Teamleader
- TechMan
- tel.search.ch
- TITAN
- vtiger CRM
- webCRM
- WebSolve
- WinSIMS
- Workbooks
- Yoobi
- Zendesk
- Zoho CRM

## CONTACT SEARCHING

Concurrently searches integrated CRMs and enables Contact Popping or Click-to-dial from the results.

## CLICK-TO-DIAL

Makes it possible to dial directly from the CRM.

## ADD CONTACT / ACCOUNT

Add a new record to the CRM directly from the client Caller Preview Window or Call History page.

## CONTACT POPPING

Manually or automatically “pop” a customer record when a match is found for an active call.

## ACTIVITY LOGGING

Manually or automatically create an activity record of a call received within the CRM and easily add further notes.

**Add contact**

Phone number: +442079460123

Type: Salesforce: Contact

Name: Joe Cartwright

Company:

Number type: Work

E-mail:

Notes:

Save Save and Edit Cancel

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In addition to the CRM integration features, Version 4+ has a range of powerful unified communication features including:

## PRESENCE

See extension status of co-workers. From the dockable presence window a user can also make calls, transfer, or pick up co-worker calls.

## PREFERRED DEVICE

Users can select which connected device they would like to use to make or receive calls with.

## AGENT FEATURES\*

Version 4+ provides a simple way for a Call Center agent to change settings, including join and unjoin queue, check queue data, select disposition code, escalate to Supervisor, manually set outbound DNIS number, and more. CRM Integration features also available in the Toolbar interface for Agents.

## CLOUD CONTACTS

A simple multi-tenant contact database that allows an end customer to add and share external contacts across its user base. New contacts are added easily while on a call or from the Call History.

## MULTIPLE INTERFACES

The AppBar\* is an interactive bar that provides quick access to features. The Preview Window allows for call control during a call. The Toolbar\* provides a dockable UI with comprehensive set of agent features.

## SMARTBUSY FOR ZOOM AND GOTOMEETING\*

Detects when a user is participating in a GoToMeeting or Zoom meeting and enables the user to forward an incoming call to another destination.



GoToMeeting



zoom

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## MICROSOFT TEAMS INTEGRATION

A range of deep-level features that enhance Version 4+ including:

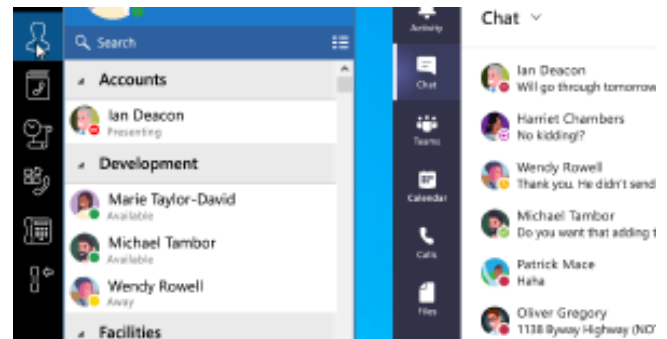
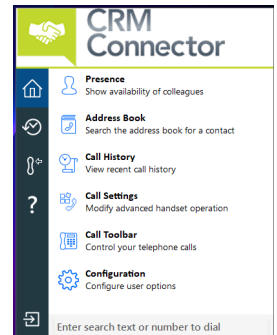
- Show, Add, Pop CRM contact for call ringing / answered using Teams#
- Select Teams as preferred dialing device and Click to dial through Teams client#
- Open Microsoft Teams chat from Version 4+ Presence
- Show photo / avatar in Version 4+ Presence
- Show co-workers Microsoft Teams availability in Version 4+ Presence\*

# Require Microsoft Teams direct routing (or similar)

## UPDATE MICROSOFT TEAMS PRESENCE

Sets the user's Microsoft Teams presence to "In a call" when a user is on a BroadWorks Call.

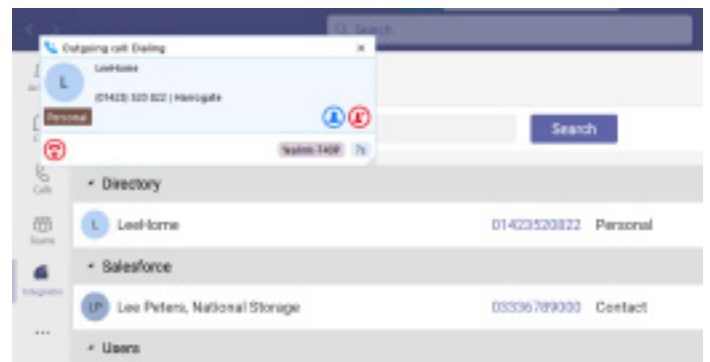
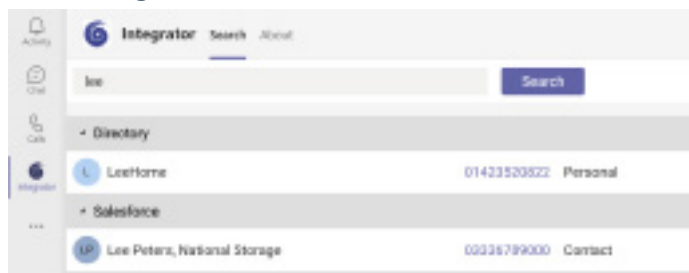
\*Calendar-based "Out of Office" states and publishing "In a call" status to Microsoft Teams are Microsoft Graph API Beta features therefore these functions are subject to modification/removal.



## SEARCH AND CALL FOR MICROSOFT TEAMS

Search and Call is a companion application that can be added to Microsoft Teams. It connects to Go Integrator and enables users access to key features from within Microsoft Teams. Users of Search and Call can:

- Perform a search of contacts and display results in Microsoft Teams.
- Make a call through from Microsoft Teams



## SMARTBUSY FOR MICROSOFT TEAMS

SmartBusy for Teams addresses the problem of inbound PBX calls still being received if the user has a meeting scheduled in Outlook, or if they are on a Microsoft Teams Call or Conference. This feature enables the user to forward an incoming call via their PBX to another destination.

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