

**MOMENTUM**

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# CRM CONNECTOR

Bridge the gap between your customers  
*and your business systems*



- » Realize the full potential of your hosted telephony solution.
- » Improve the quality and professionalism of your call handling and the caller's experience.
- » Increase the productivity and collaboration of your phone system's users.
- » Reduce the time and costs involved with making and receiving large volumes of calls.

## APPLICATION INTEGRATION

The Momentum CRM Connector is a powerful, computer-telephony integration (CTI) tool that provides enhanced communication and collaboration when integrated with their Momentum hosted telephone services and the organization's CRM database applications.

Standard integrations currently include: ACT!, Connectwise, EGroupware, Goldmine, Google Contacts, LDAP, Lotus Notes, Maximizer, Microsoft Access, Microsoft Dynamics CRM, Microsoft Dynamics NAV, Microsoft Outlook, NetSuite, ODBC, Sage 50 Accounts, Sage CRM, Salesforce (Enterprise Edition) SalesLogix, SugarCRM, SuperOffice, Vtiger, and Zoho CRM.

## VERTICAL INTEGRATION

Development services are available to provide custom integration with vertical applications and others.

**act!**<sup>TM</sup>

**A** Access

**Connect+Wise**<sup>SM</sup>  
IT's Business Operating System

**GoldMine**

**Google**

**Lotus**  **Notes**

 **Microsoft Dynamics**

**sage**

**salesforce**

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# CRM CONNECTOR

## FEATURES

### CALL CONTROLS

Without needing to touch their handset, a user can access a full range of controls over inbound and outbound calls including dialing, answering, transfer, consult, and hang-up.

### ADDRESS BOOK

Details of regular contacts can be stored in the application's local address book, which can be searched, and a contact's number dialed – all with a simple click.

### CALLER PREVIEW

If a match for the caller is located in the local address book (or within an integrated application) for inbound and outbound calls, the caller's summary details are displayed on the screen. This allows the Momentum CRM Connector user to see who is calling them before they answer the call.

### CONTACT POPPING

If a caller is located in either the local Momentum CRM Connector address book or in an integrated application, their full details can be quickly "popped" on a new browser tab.

### RECENT AND HISTORY LISTS

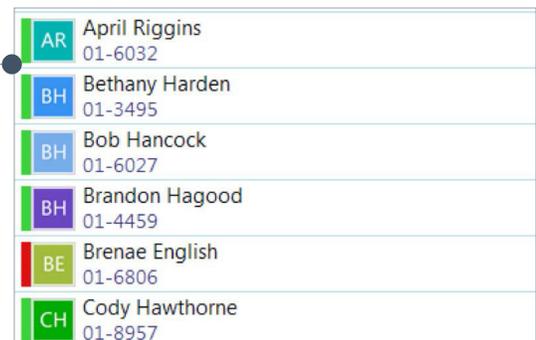
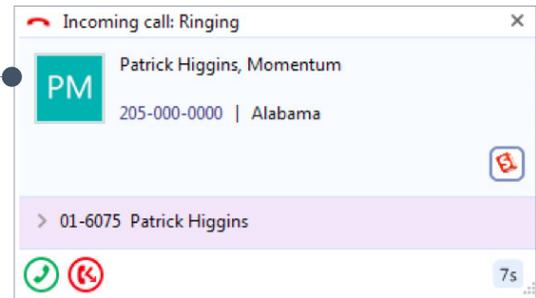
Users can quickly view a list of the most recent numbers that they have dialed or a fuller history list of all inbound and outbound calls. Any telephone number in these lists can be re-dialed with a simple click.

### REAL-TIME PRESENCE

The "presence" screen allows users to check the busy-status of their colleagues' extensions. This feature greatly improves coordination and collaboration between users. A maximum of 30 statuses are viewable.

### APPLICATION AND INTERNET DIALING

Momentum CRM Connector supports several methods of dialing from applications. Many applications can be enabled to allow dialing directly from within the application. Web pages can be scanned for valid telephone numbers – and when found, they are turned into hyperlinks to make dialing fast and easy.



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