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 A group blog by Mirjam Baumberger in General



Fridays' Swyx Tip #37: CTI for MS CRM



Entry posted by Tom Wellige June 26, 2020

614 views

From 2009 to 2011 [mirjam baumberger](#) wrote a great blog, the "**Fridays' Swyx Tip**". Every Friday she posted a tip regarding the usage of SwyxWare and connected tools and devices. As the old forum is offline, this article series will be restored here again over the time. Please note that some information in this article series might not be valid anymore with current SwyxWare versions.

This blog article was originally posted on 04.02.2010 23:01

Dear Swyx Users

Swyx's "Click2Dial" from any application is a well appreciated feature, all of you are familiar with. Highlight the number and press "F11" on your keyboard. But computer telephony integration (CTI) goes far beyond just doing phone calls from your desktop.

CTI is all about bridging the gap between the phone system and the business application.

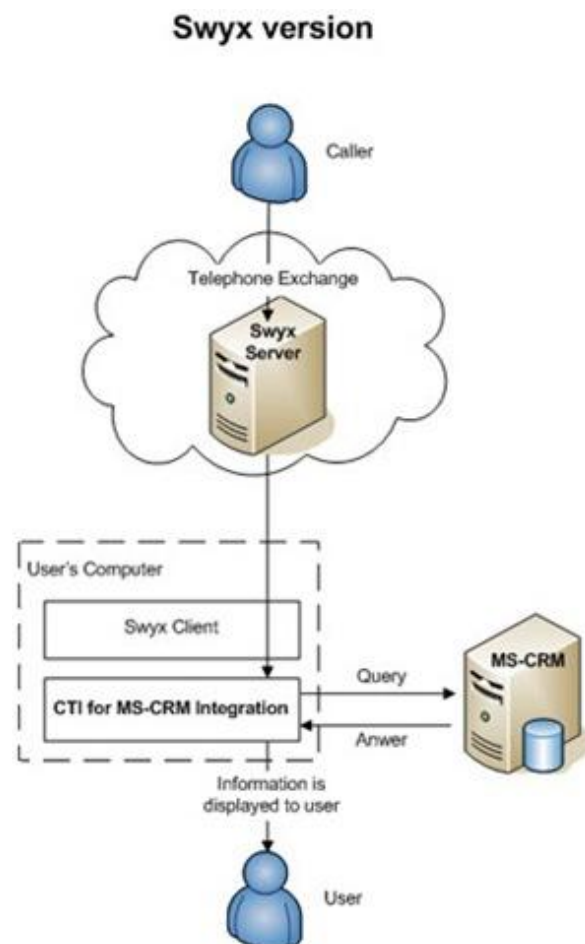
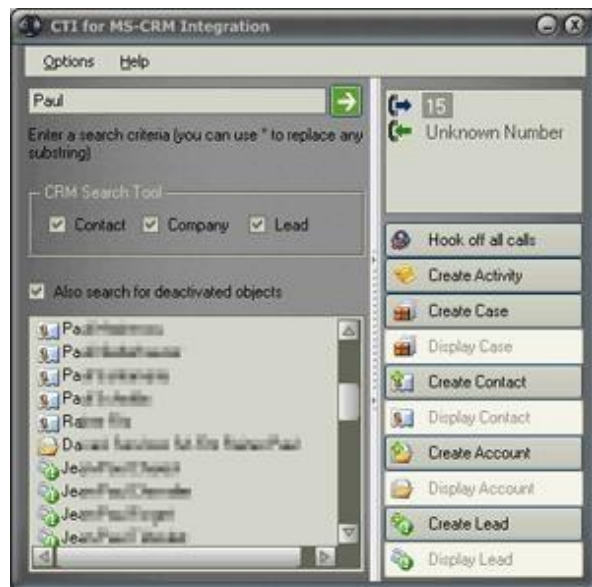
Let's look at a very popular CRM solution today, MS CRM Dynamics.

CTI for MS-CRM integration software is a flexible and user-friendly interface between Swyx and CRM Microsoft Dynamics application. MS CRM integration software enables you to provide superior customer service by connecting your phone system with the MS CRM application. Actions can be defined such as create new case, create new call note or simply open the account page depending on the number called, or line used to initiate the call.

What happens with an incoming call?

The application automatically displays record's information (prospect, account & contact) of the caller, and allows automatic creation of a new activity associated to a number if it is still missing in MS-CRM.

It is even possible to pop- up information on customized entities.

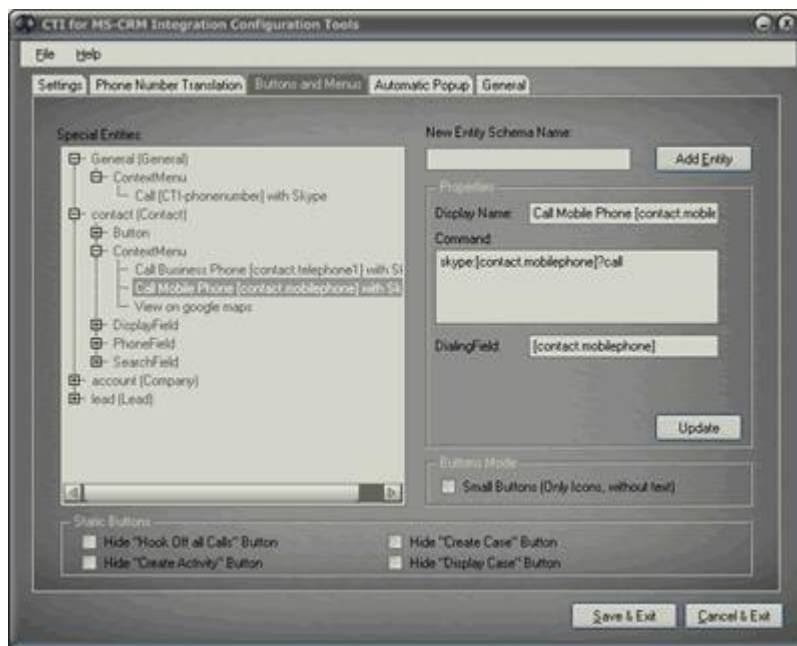


How to do an outbound call?

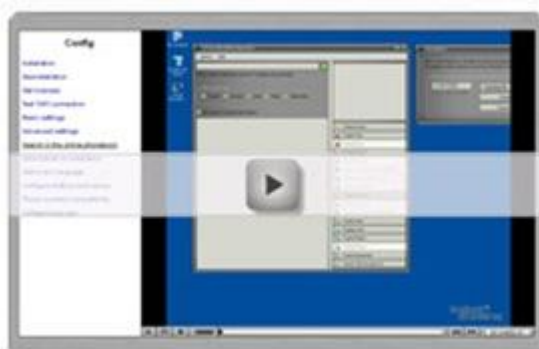
You can click the Dial button in your MS CRM application or you can use the F11 function of Swyx. This gives you the possibility to directly reach the correspondent through the MS-CRM interface, or through the CTI for MS-CRM Integration search function.



CTI for MS-CRM Integration allows you to create your custom actions. So, it is possible to add buttons and entries in context menus that allow you, for example, to localize a map on [Google Maps](#) or to call via [Skype](#).



An introduction video on how to install and configure the CTI for MS CRM application can be found [here](#):



Note, there is also a TAPI version available of this solution, allowing similar functionality with other phone systems.


Have a good weekend and happy Swyxing...

Regards

Mirjam

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