CRM Link

**Poltys Inc.**
Unified Communications Solutions

Overview

Poltys has developed a cost effective **Agent productivity** alternative to help you manage your incoming calls and customer information easily using screen pops.

The caller's phone number and other relevant CRM data are shown on the screen before the call is answered.

Telephone numbers for contacts can also be searched and dialed directly from within the CRM application.

Key Features

- Works standalone or integrated with Poltys CCAgent
- Integrate with most CRMs on the market, including custom developed ones
- Lookup into the CRM database based on Caller ID information
- Dial out using any contact phone number by using shortcut key or click to call
- Options
  - Search for multiple entries in the CRM database
  - Open the CRM contact information upon user request
  - Add CRM entries for incoming calls from new contacts
  - Custom processing of CRM database entries
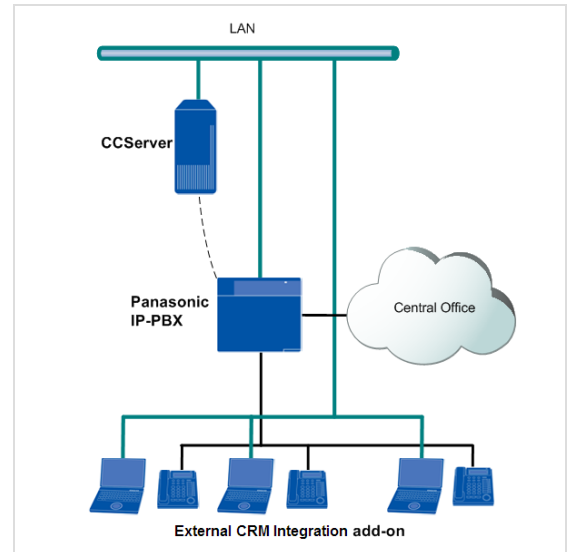
Benefits

- Improve customer communication and retention
- Increase company profitability
- More targeted marketing
- Increase business focus
- Enhance customer and prospect tracking

CRM Systems Coverage

- Customers can take advantage of direct pop-up screens from the following CRM systems:
  - Salesforce, Microsoft Dynamics CRM, ACT! 2014 Premium and Professional v.16 (non web-based versions) ACT! 6.0, ADP, EBIX, Goldmine 6.5, IBM Lotus Notes 8.5, Maximizer 7.0, NetSuite, Tigerpaw, vTiger, Microsoft Outlook 2003 and 2007, any 1st party TAPI CRM
- Poltys offers direct integration services with the following SQL databases upon customer request:
  - Oracle SAP
  - IBM DB2
  - MS SQL Server