

axis diplomat 2024 Modules

Telephony Interface

The **axis diplomat** Telephony Interface module offers close integration between **axis diplomat** and supported telephony systems.

Want to know who's calling before you answer? Want customer and supplier information brought up on your screen the instant you answer a call? Like to have the system dial a customer or supplier contact for you? The Telephony interface provides these facilities and more.

Telephony Interface module

The Telephony Integration module provides market-leading CTI (Computer Telephony Integration) between 'phone system and **axis diplomat**.

The module enables **axis diplomat** to interact closely with the 'phone system to assist with the handling of both inbound and outbound calls.

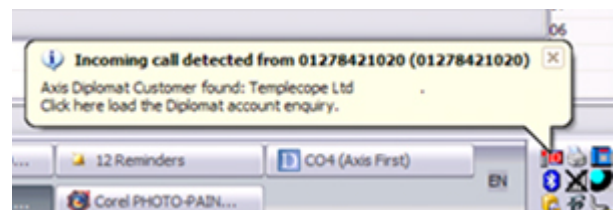
Key Features

- Identifies inbound callers using the **axis diplomat** CRM database of customer and supplier contact 'phone numbers.
- 'Screen-pops' directly into the customer or supplier enquiry for the caller (optional).
- Dials for you when you click on a contact name within the customer or supplier enquiry contacts screen.
- "Call" buttons within CRM functions provide one-click customer dialing.
- Shows phone call history with time, date and duration as 'Events' against customers and suppliers.

Identifying inbound callers

When a call is received the 'phone system passes information to **axis diplomat** which attempts to match the calling number against all numbers which have been recorded in customer and supplier account contacts.

The result is displayed in a speech-bubble from your Windows system tray as in the illustration opposite.



If the number is unique to an individual contact (for example a mobile or DDI number) the contact's name is displayed as well as their organisation name

Screen-popping

Screen-popping is the automatic launching of an application based, in this case, on the identification of the caller.

Clicking the speech-bubble instructs **axis diplomat** to automatically launch the customer or supplier enquiry screen relevant to the caller. There's no need to find and launch the function yourself, no need to ask who's calling and no keeping the caller waiting while you find the right customer or supplier record.

You can choose to ignore the speech-bubble. It will fade away without interrupting your flow of work.

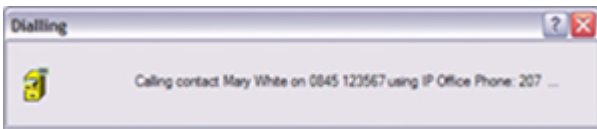
Users can configure an option to 'Pop on answer' which causes the relevant customer or supplier enquiry to be opened automatically when an inbound call is answered by that user.

The telephony module helps you to improve the speed and efficiency of call handling within your business as well as helping you to project a more professional image at the point of answer.

Dialing a contact

To make a call, simply select the contact you need to 'phone from either the customer or supplier enquiry functions and click the one of the available options.

You can choose to 'phone the telephone number or a mobile number for the contact if this is recorded.



You'll see confirmation that the call is being made on screen as the number is dialed.

Call history

Integrates with **axis diplomat**'s CRM functionality to provide an easily accessible history of phone calls made to or received from a customer or supplier. Call information is displayed within the 'Events' tab of Customer or Supplier Enquiry functions and within a 'Telephony' tab of **axis diplomat** Monitors.

Calls to or from any phone number associated with a customer or supplier account or any contact on the account will be shown.

"Call" Buttons

Numerous functions within the **axis diplomat** CRM module have been Telephony enabled. With the Telephony Integration module additional "Call" buttons appear within functions such as CRM call logging and Campaign call handling.

Whether you're dealing with a sales enquiry, running a help-desk or a tele-marketing campaign this functionality speeds up dialing and eliminates mis-dials.

axisfirst
Business Software

Please call us on **0800 668 1934** for further details



01278 421020



sales@axisfirst.co.uk



www.axisfirst.co.uk