FacetPhone®/RM

Interface for FACTS

Pivotal Systems' interface to FacetPhone®, the award winning IP-PBX telephone system, combines the best of TAPI features with the deep native functionality of Relationship Management.

The FacetPhone® interface supports outbound dialing as well as inbound caller id and phone number recognition. In addition, it provides a portal to all of the Relationship Management features and functionality within FACTS.

Outbound Dialing:

Mr. Steve Smith
1 - Work: 952-983-0987
2 - Mobile: 612-240-1673
3 - Home: 952-983-0991
4 - Cabin: 333-123-45678

- Select from up to 4 phone numbers when dialing
- Automatic contact note created recording call duration and status
- Optional contact note relating to call content
- Dial icons / buttons are available in all RM programs, order entry, quotes, purchase orders, customer and vendor inquiries

Inbound Calls:

- Automatic contact note created recording call duration and status
- Context specific note
- Contact lookup by phone #, company name and contact search if no matches are found
- Automatic association of phone # to contact, customer or vendor
- Supports multiple phone numbers for a single contact
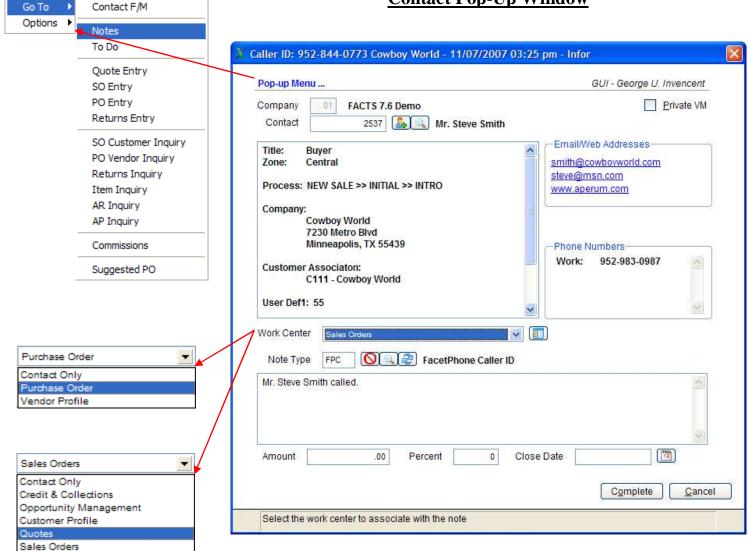- Full featured, association specific contact pop-up – see next page

Leverage the power FacetPhone®, the award winning IP-PBX telephone system, with the deep native functionality of Relationship Management and FACTS

2006 INTERNET TELEPHONY PRODUCT OF THE YEAR
2005 INTERNET TELEPHONY PRODUCT OF THE YEAR
2007 INTERNET TELEPHONY PRODUCT OF THE YEAR

FacetPhone

Pivotal SYSTEMS

Empowering Your Business.™

Pivotal SYSTEMS
Empowering Your Business.™

FacetPhone®
Interface for FACTS

Contact Pop-Up Window

Go To ► Contact F/M
Options ►
Notes
To Do

Quote Entry
SO Entry
PO Entry
Returns Entry

SO Customer Inquiry
PO Vendor Inquiry
Returns Inquiry
Item Inquiry
AR Inquiry
AP Inquiry

Commissions

Suggested PO

Purchase Order ▼
Contact Only
Purchase Order
Vendor Profile

Sales Orders ▼
Contact Only
Credit & Collections
Opportunity Management
Customer Profile
Quotes
Sales Orders

Caller ID: 952-844-0773 Cowboy World - 11/07/2007 03:25 pm - Infor

Pop-up Menu ...   GUI - George U. Invencent

Company   01   FACTS 7.6 Demo   ☐ Private VM
Contact   2537   Mr. Steve Smith

Title: Buyer
Zone: Central

Process: NEW SALE >> INITIAL >> INTRO

Company:
    Cowboy World
    7230 Metro Blvd
    Minneapolis, TX 55439

Customer Associaton:
    C111 - Cowboy World

User Def1: 55

Email/Web Addresses
smith@cowboyworld.com
steve@msn.com
www.aperum.com

Phone Numbers
Work: 952-983-0987

Work Center   Sales Orders

Note Type   FPC   FacetPhone Caller ID

Mr. Steve Smith called.

Amount   .00   Percent   0   Close Date

Complete   Cancel

Select the work center to associate with the note

- The **Pop-up Menu..** button provides access to the same Go To & Options menus found throughout Relationship Management
- Work Center drop box is association specific and provides direct access to customer or vendor related Work Centers
- When a Work Center item is selected, both the call duration note and the pop-up note are written back to the Work Center
- Recorded calls can be attached to the item selected from the Work Center
- Send email or access a contact's web site with hyperlinks
- See useful contact information in scrollable info box
- And more….