

ADD-ONS

Phone system for Microsoft Dynamics® NAV

Our phone system add-on allows customers to integrate their digital phone system with Microsoft Dynamics NAV, so that users can quickly retrieve information on contacts making incoming calls.

On receipt of a call the phone system issues a link, containing the phone number, to our add-on. The add-on then interrogates the NAV database and produces a pop-up list of all contacts associated with that number.

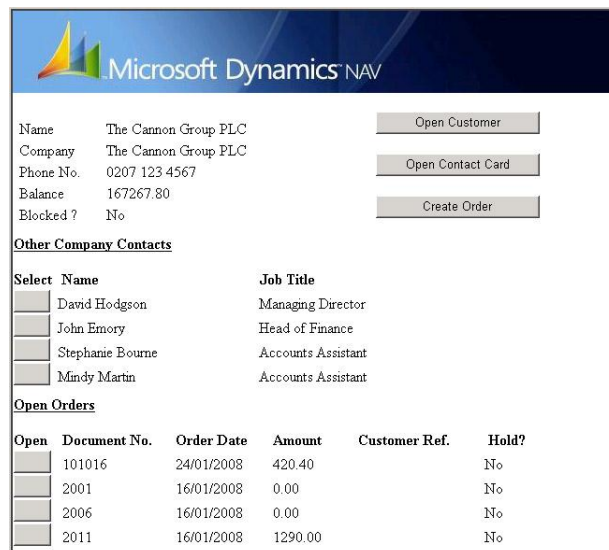
Once the user has clicked on the name of the specific contact making the call, or if only a single contact is found, the program quickly presents important information relevant to that contact, such as:

- Outstanding balance
- Outstanding orders
- Details of related contacts who have different phone numbers

In addition, the phone system add-on allows the user to open customer / vendor cards, contact cards, orders, open a related contacts card or create a new order for that customer or vendor directly within NAV.

If the number issued by the phone system is not in the NAV database, then the user is given the option to create a new customer, vendor or contact as appropriate.

Screenshot



The screenshot displays the Microsoft Dynamics NAV interface for a contact record. The contact details for 'The Cannon Group PLC' are shown, including the phone number 0207 123 4567 and a balance of 167267.80. Action buttons for 'Open Customer', 'Open Contact Card', and 'Create Order' are visible. Below the contact details, there is a section for 'Other Company Contacts' with a table listing contacts and their job titles. At the bottom, there is a table for 'Open Orders' listing document numbers, order dates, amounts, and hold status.

Select	Name	Job Title
<input type="checkbox"/>	David Hodgson	Managing Director
<input type="checkbox"/>	John Emory	Head of Finance
<input type="checkbox"/>	Stephanie Bourne	Accounts Assistant
<input type="checkbox"/>	Mindy Martin	Accounts Assistant

Open	Document No.	Order Date	Amount	Customer Ref.	Hold?
<input type="checkbox"/>	101016	24/01/2008	420.40		No
<input type="checkbox"/>	2001	16/01/2008	0.00		No
<input type="checkbox"/>	2006	16/01/2008	0.00		No
<input type="checkbox"/>	2011	16/01/2008	1290.00		No

Application version: Version 4 or later.

Client version: Version 4 or later.

Languages supported: English. Additional languages would be subject to customisation.

Number of installs: Two (as of March 2010).

Price: £POA – price is dependent on phone system in use and functional requirements.

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