snowPOP

CRM data with the call

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Introduction

snowPOP is now a familiar term often used to describe the process of capturing an incoming caller ID and then searching the phone fields in a popular contact management database. If a match is found then it can reasonably be deduced that the caller ID matches the database record and this record can be popped onto the users PC screen. This application is particularly useful when the customers calling are primarily customers with whom you have already done business. snowPOP does all of the above, but also goes one step further by providing the ability to pop the contact details directly onto the screen of your phone.

Contact Popping

snowPOP will pop on "both" incoming and outgoing calls so that the user is presented with the database record automatically. Not only will it pop the standard contact information, it also enables the user to decide which fields they want to display and the ability to configure their personal settings to display them. Typically, a user will want to see the caller's number, company and contact name but they may also want to display an Account Number or unpaid debt indicator.

snowPOP

1234 567 890
Steve Jasson
snowPOP

Pop to PC Screen

Popping to the PC screen can be achieved using several methods and these are as follows:

Mini Task Window

This is probably the most popular method as it is non-intrusive and allows the user to continue what they are doing when a call arrives. The user can see who is calling via a small window that pops up towards the bottom right of the PC screen and can also launch the full contact record by clicking on the contacts name.

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Mini Task Window

snowPOP already supports the most commonly used CRM applications but has been designed in a way that allows additional CRM applications or even proprietary database solutions to be integrated quickly and easily.

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- Outlook (2000, 2002/XP, 2003, 2007)
- Microsoft Excel (2003, 2007)
- Access (2003, 2007)
- Microsoft CRM & Dynamics (V1.2, V3.0, V4.0)
- Microsoft SQL (2000, 2005)
- MySQL (V4.1, V5.0)
- SuarCRM (V4.1, V5.1)
- Goldmine (V6.5+) Lotus Notes (V6.5)
- Sage Line 50
- Act! (V6.0, V8.0, V9.0, V10.0)
- Maximized (V8.0, V10.0)
- Salesforce.com
- Oracle (10g)
- Bespoke Drivers written

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### Now you can see who's calling, before you pick up the phone

CRM Contact Form

The second and probably the most commonly recognized method is to pop the contact form supplied with the users CRM application. The sample below shows how the contact record from outlook could be popped to the screen so that the user can access/amend the appropriate information during or after the call.
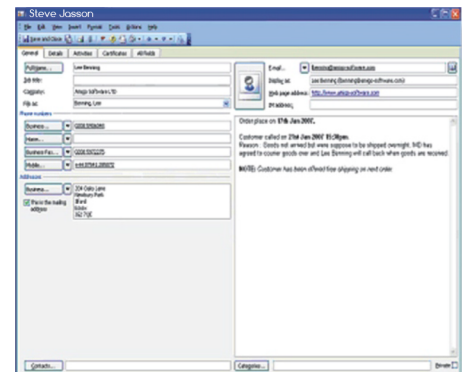
Internet Browser

Finally, there are now many "proprietary" CRM solutions that are accessed via an internet browser such as Internet Explorer. POP has been designed to work with these solutions by providing the ability to launch the users browser and to pass the appropriate call information allowing contact record to be located and displayed.

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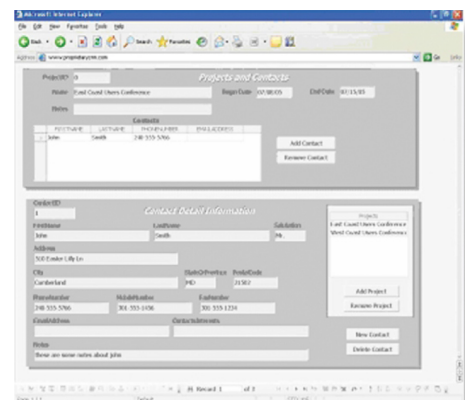
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POP to the user Handset

Unlike most Screen popping solutions, snowPOP has a big differentiating feature in that it can pop to the screen of the phone. This means that you can see who is calling even when answering a phone that is not next to a PC and means you still have the contact details at your finger tips

7/8/2014   14:02

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Dial out From Screen

Some CRM applications provide you with a dial out facility. Sometimes they work, sometimes they don't. To remedy this deficiency POP offers and tidy solution that provides the user with hot keys which when pressed will automatically dial the number that has been highlighted "anywhere" on the PC screen.

Additional Features

- Pop on Transfer
- Search Masks
- Additional Features
- Customize Search Fields
- Customize Display Fields

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