

Zoom Phone NetSuite Integration

Description

The Zoom Phone NetSuite Integration module enables you to make one-click phone calls directly from NetSuite, and quickly locate relevant contact records when receiving an incoming call.

Features

- ▲ When viewing a contact in NetSuite, simply click the contact's phone number to start the call.
- ▲ Calls automatically open the "Phone Call" record which you can use to record information about the call and update the Last Sales Activity Date (LSAD).
- ▲ For inbound calls, NetSuite will instantly search and retrieve a matching contact number in the system and open the relevant record for a seamless user experience.
- ▲ If the number is not in the system, you'll be given the option of creating a new customer record or updating an existing record.
- ▲ When receiving an inbound call, if your NetSuite instance has multiple records with the same phone number, you'll be able to select which contact record you'd like to visit.
- ▲ When receiving a call from an internal phone number, such as one of your team members, the system will bypass the call and will not open the contact record in NetSuite.

Benefits

- ▲ Improved customer and vendor experiences
- ▲ Easier access to pertinent deal information
- ▲ Better tracking of key sales activities and efforts
- ▲ Streamlined internal processes
- ▲ Decreased data entry and errors