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Declarations under Rule 4.17:

- as to applicant's entitlement to apply for and be granted a patent (Rule 4.17(ii))
- as to the applicant's entitlement to claim the priority of the earlier application (Rule 4.17(iii))

Published:

- with international search report (Art. 21(3))

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(54) **Title:** INTEGRATING CUSTOMER RELATIONSHIP MANAGEMENT INFORMATION TO COMMUNICATION SESSIONS

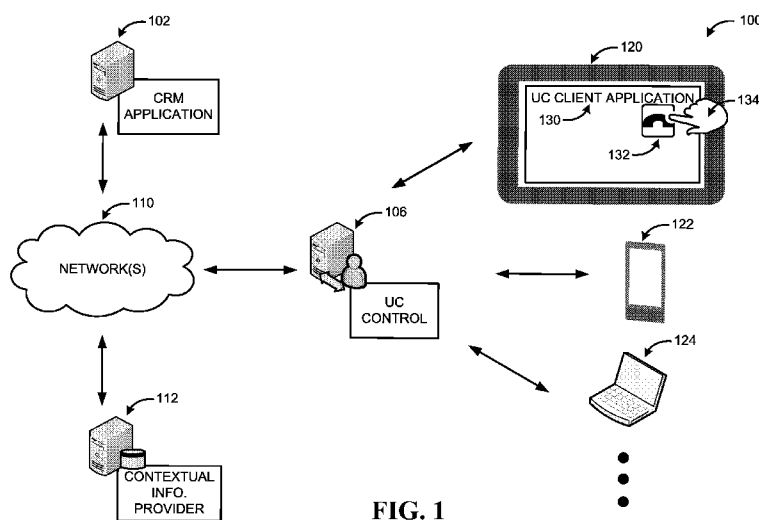


FIG. 1

(57) **Abstract:** Customer relationship management (CRM) information is integrated with communication sessions. A unified communication (UC) client application initiates a call with a contact in response to a request by a CRM application presenting an opportunity associated with the contact. The UC application receives contextual information and documents associated with the opportunity. The contextual information includes attributes and relationship information associated with the opportunity and the contact. Contacts associated with the opportunity is displayed within a user interface (UI) such as a people view. The application provides controls to manage contextual information of the contacts associated with the opportunity. Documents associated with the opportunity are also presented within another UI such as a documents view.



(15) Information about Correction:

Previous Correction:

see Notice of 6 August 2015

INTERNATIONAL SEARCH REPORT

International application No.

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A. CLASSIFICATION OF SUBJECT MATTER

IPC(8) - G06F 3/048 (2015.1)

CPC - G06F 3/0484 (2015.10)

According to International Patent Classification (IPC) or to both national classification and IPC

B. FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)

IPC(8) - G06F 3/048, G06F 3/0484, G06F 15/16, G06F 17/00, H04L 29/06 (2015.1)

CPC - G06F 3/0484, G06F 17/2247, G06F 17/30896, G06Q 10/107, H04L 65/1069, H04L 65/4023, H04L 65/403 (2015.10)

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

UPC - 709/205, 715/236, 715/753, 715/781 (Keyword delimited)

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)

Orbit, Google Patents, Google Scholar, Google

Search terms used: integrate customer relationship management (CRM) information to communication sessions

C. DOCUMENTS CONSIDERED TO BE RELEVANT

Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
X	US 2006/0053196 A1 (SPATARO et al) 09 March 2006 (09.03.2006) entire document	1-10
A	US 2008/0240381 A1 (ACHARYA et al) 02 October 2008 (02.10.2008) entire document	1-10
A	US 2009/0031232 A1 (BREZINA et al) 29 January 2009 (29.01.2009) entire document	1-10
A	US 2010/0070851 A1 (CHEN et al) 18 March 2010 (18.03.2010) entire document	1-10
A	US 2007/0036320 A1 (MANDALIA et al) 15 February 2007 (15.02.2007) entire document	1-10

 Further documents are listed in the continuation of Box C.

 See patent family annex.

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"O" document referring to an oral disclosure, use, exhibition or other means

"P" document published prior to the international filing date but later than the priority date claimed

"T" later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention

"X" document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone

"Y" document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art

"&" document member of the same patent family

Date of the actual completion of the international search

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