



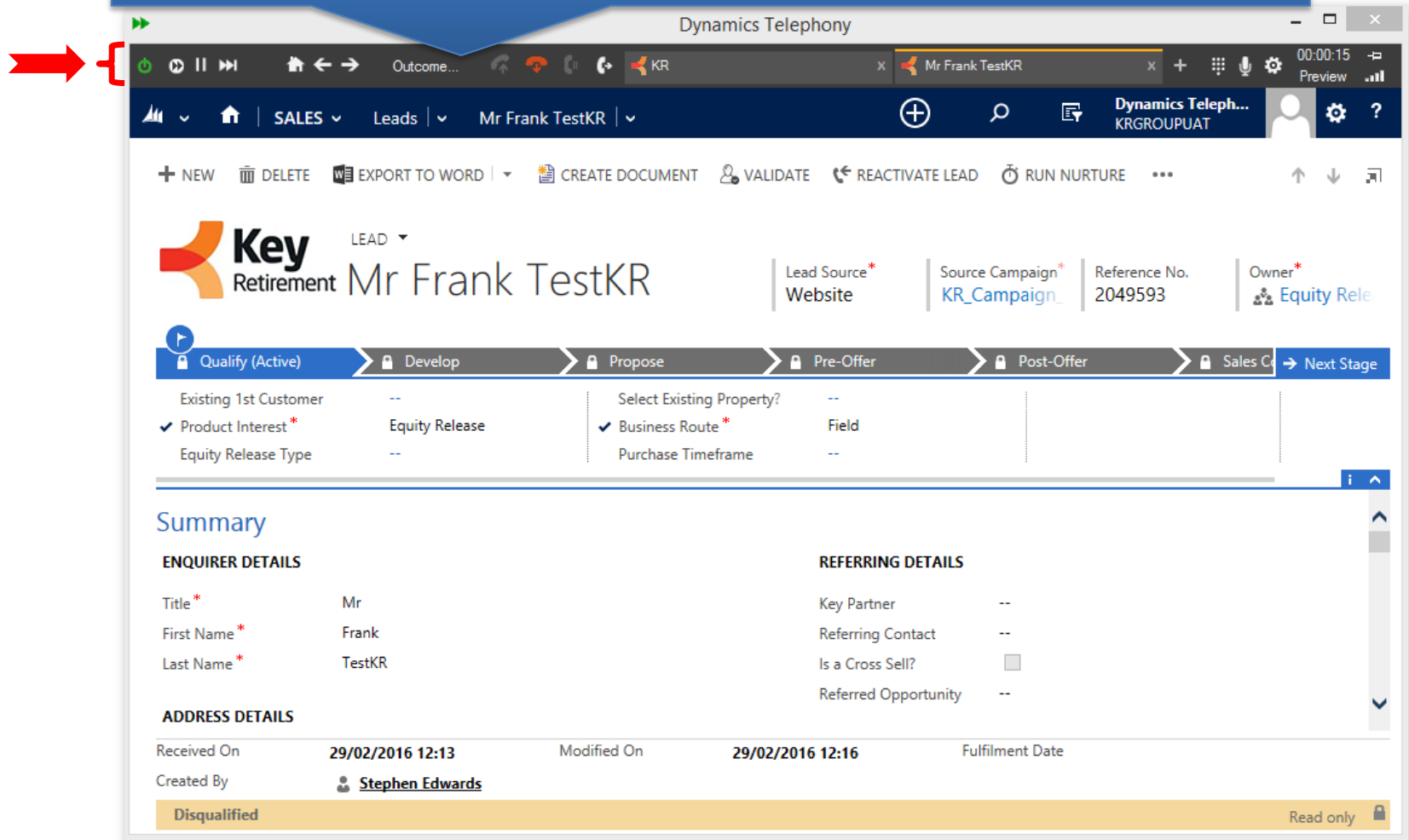
# *Dynamics Telephony*

Seamless Dynamics CRM telephony integration, for all telephone systems.

Available to download from MS App source

# Dynamics Telephony Toolbar

Dynamics Telephony toolbar blends beautifully,  
and actually results in MORE space for Dynamics CRM



The screenshot shows the Dynamics CRM interface with the Dynamics Telephony toolbar integrated into the top navigation bar. A red arrow points to the toolbar, which includes icons for call, hold, transfer, and other telephony functions. The main content area displays the lead details for 'Mr Frank TestKR'.

**Lead Details:**

- Lead Source:** Website
- Source Campaign:** KR\_Campaign
- Reference No.:** 2049593
- Owner:** Equity Release

**Lead Process Flow:**

- Qualify (Active) > Develop > Propose > Pre-Offer > Post-Offer > Sales > Next Stage

**Summary:**

ENQUIRER DETAILS		REFERRING DETAILS	
Title*	Mr	Key Partner	--
First Name*	Frank	Referring Contact	--
Last Name*	TestKR	Is a Cross Sell?	<input type="checkbox"/>
		Referred Opportunity	--

**ADDRESS DETAILS**

Received On	Modified On	Fulfilment Date
29/02/2016 12:13	29/02/2016 12:16	

**Created By:** Stephen Edwards

**Status:** Disqualified

**Read only**

# Call log, screen pop & Click-to-dial

Pop contact, lead or account card.

Inbound call notification popup with callers name

Hangup, hold and transfer controls during calls

Anywhere you see a phone number in CRM, click on it to dial it !

Every inbound and outbound call is logged in CRM

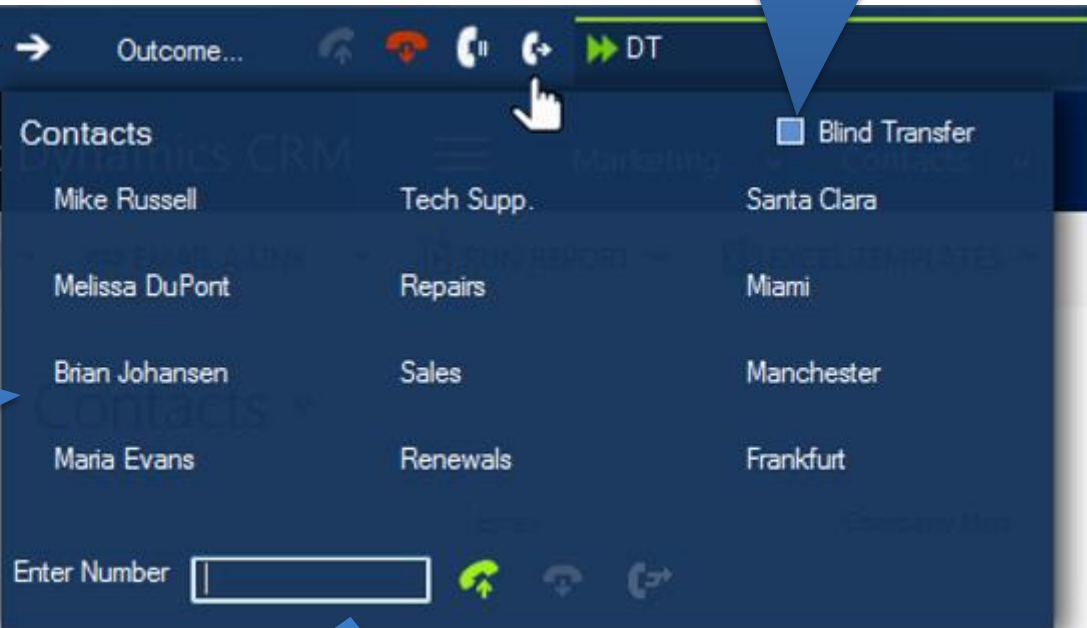
The screenshot displays the Microsoft Dynamics CRM interface. At the top, a navigation bar includes 'Outcome...', a status bar with icons for call control, and a user profile for 'Dorothy Maysonet'. Below this, the main header shows 'Microsoft Dynamics CRM' and tabs for 'Marketing' and 'Contacts'. A call notification popup is visible on the right, titled 'VIP inbound Maysonet', showing 'State: incoming', 'phonecall: 4125551212', and 'contact: Dorothy Maysonet'. It includes 'Answer' and 'Reject' buttons. The contact card for 'Dorothy Maysonet' is shown on the left, with a 'CONTACT' dropdown and a 'Business Phone' field containing the number '4125551212'. A 'Summary' section is also visible. On the right, a 'CALL LOG' section shows two entries for 'Dorothy Maysonet': 'Dynamics Telephony Click To Dial Call: Send Info Completed by Padraig McTiernan Today' and 'Dynamics Telephony Incoming Call: Completed by Dynamics Telephony'.

# Built-in Contact Directory

Call controls and handy directory panel built in to CRM.

Supports conference & transfer (blind or consult)

Personal OR group directory of favorite contacts



Ad-hoc dialing

# Call Outcome Settings

All outcomes tracked and reported IN CRM

Unlimited outcomes can be defined & customised

Examples...

Busy & No Answer are automatic retries – no need for agent to select them.

## Managed callbacks

Set Date/Time for "Callback"

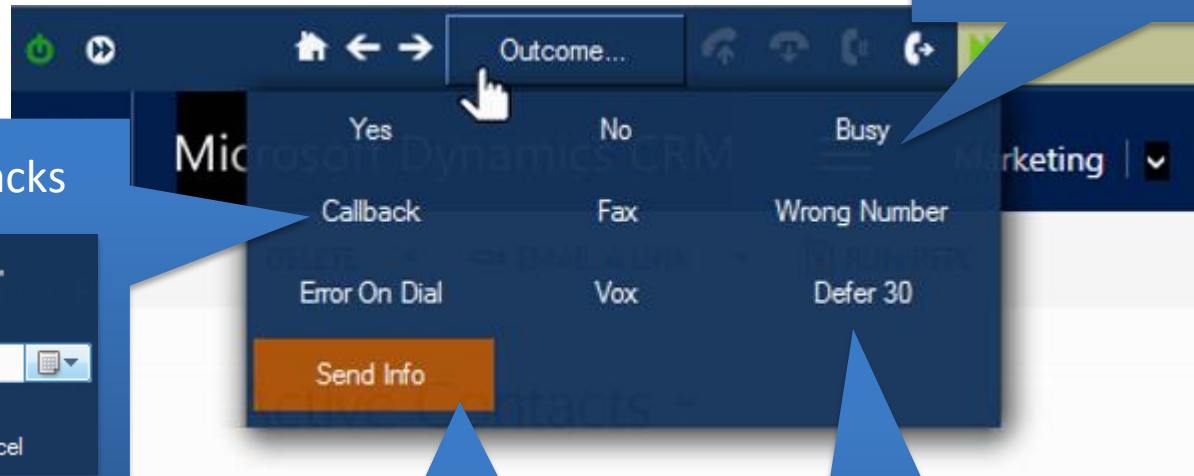
17/10/2016 15:55

OK

Cancel

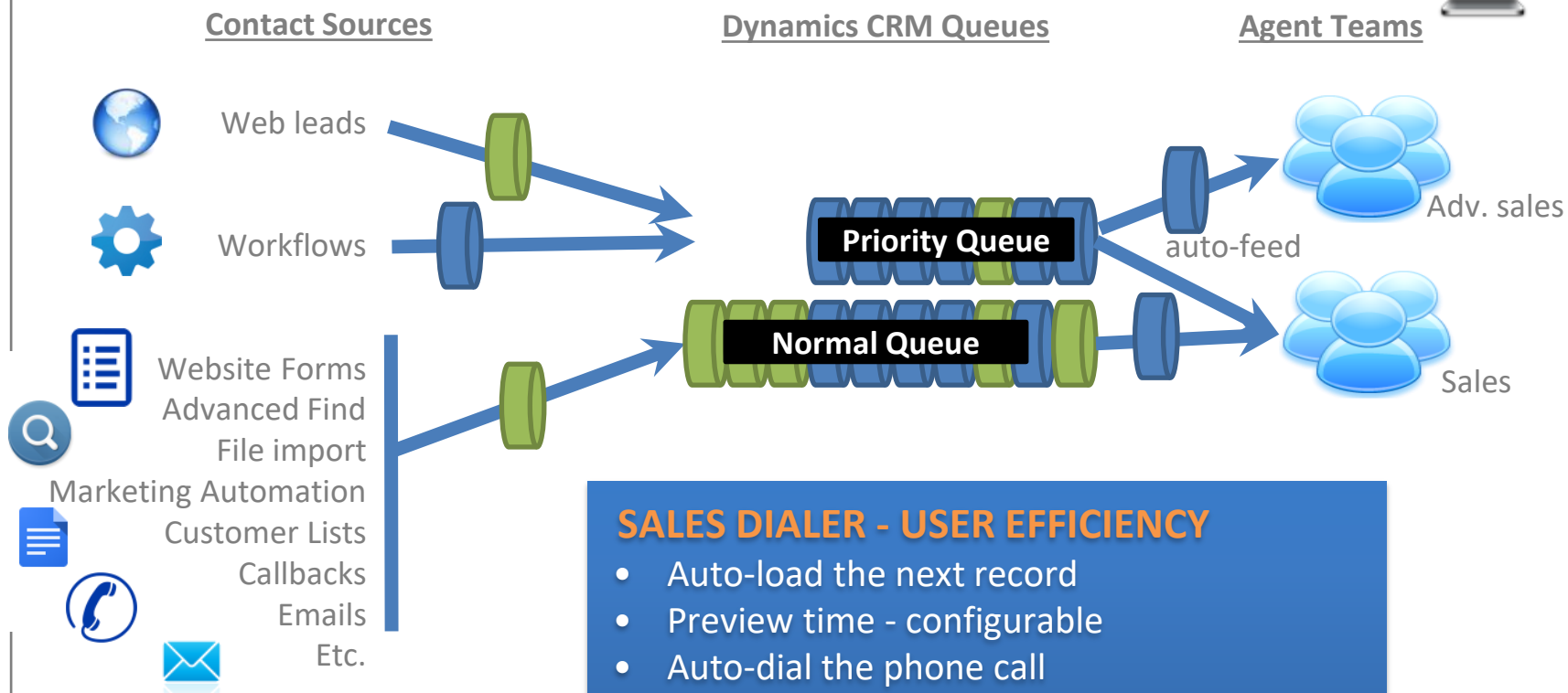
Trigger workflow to send email with attachment  
AND set up callback for 2 days time

Automatically call the customer back in 30 minutes



# Sales Dialer embedded in Dynamics CRM

Shared / personal, prioritized lists of entities (leads, opportunities, etc.) that Dynamics Telephony EMBEDDED PROGRESSIVE DIALER auto-feeds to a user, or a team of users



## SALES DIALER - USER EFFICIENCY

- Auto-load the next record
- Preview time - configurable
- Auto-dial the phone call
- Auto-reschedule no answers, busies
- Outcomes – customizable, unlimited
- Workflows - One-click business automation
- Wrap time - configurable
- Callbacks – same agent or team

# Reporting, in CRM

Comes with a suite of  
Dynamics Telephony  
Dashboards

Display in CRM

Historical & Real-time

See all agents real-time status, including who  
they are talking to

Microsoft Dynamics CRM | MARKETING

Agent Status Dashboard - Realtime

Agent	Call State	Agt State	Dur	Regarding	Cust.
O'Grady	preview	ready	19:39	Campaign 1	M Collins
Coste					
Murp					
Berna					

SAVE AS NEW SET AS DEFAULT REFRESH ALL

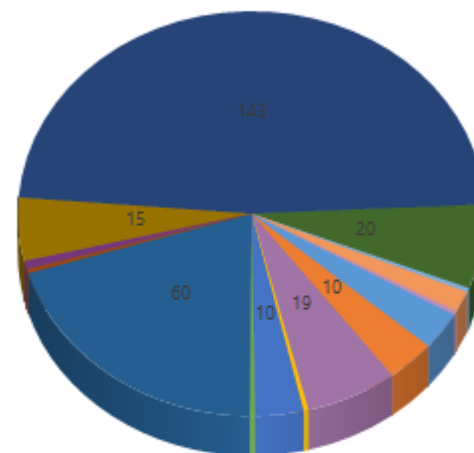
Dashboards ▾

- Dynamics Telephony Dashboard - Agent RTD
- Dynamics Telephony Dashboard - This Month
- Dynamics Telephony Dashboard - This Week
- Dynamics Telephony Dashboard - This Year**
- Dynamics Telephony Dashboard - Today

Co

## Dynamics Telephony - Call Outcome Analysis

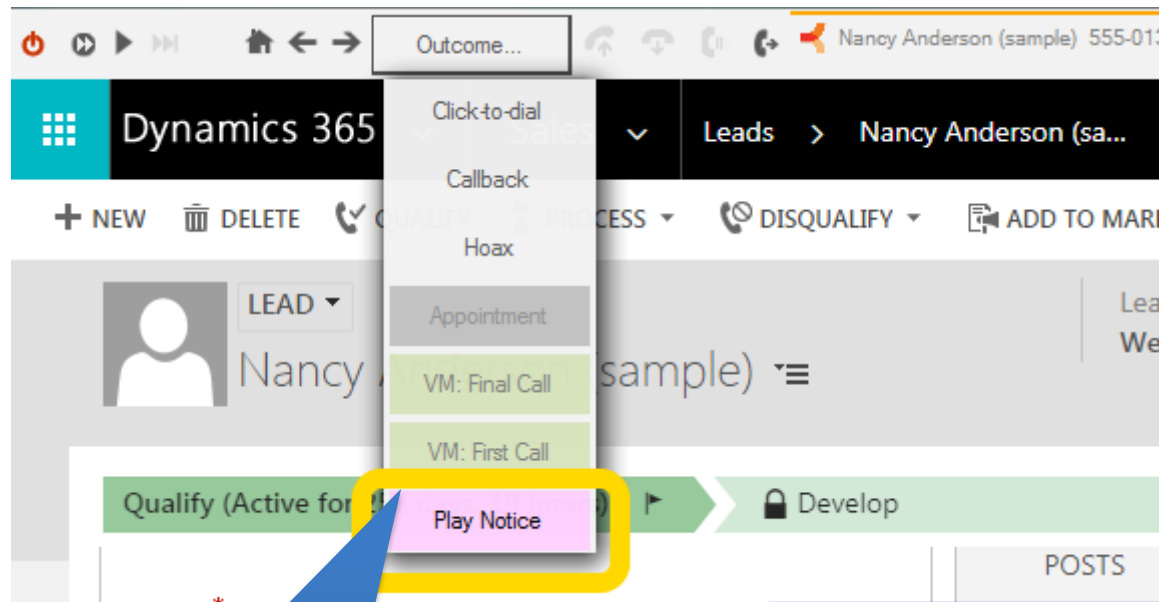
Dynamics Telephony - Call Outcome Analysis - This Year



- Callback
- Bad Number
- Busy
- Defer
- Contact Made
- InboundCall
- Voicemail
- ClickToCall
- Wrong Number
- noanswer
- Reject
- Send Info
- Yes

# Voice-Drop option

Allows for pre-recorded messages to be left when the call goes to voicemail with just one click.



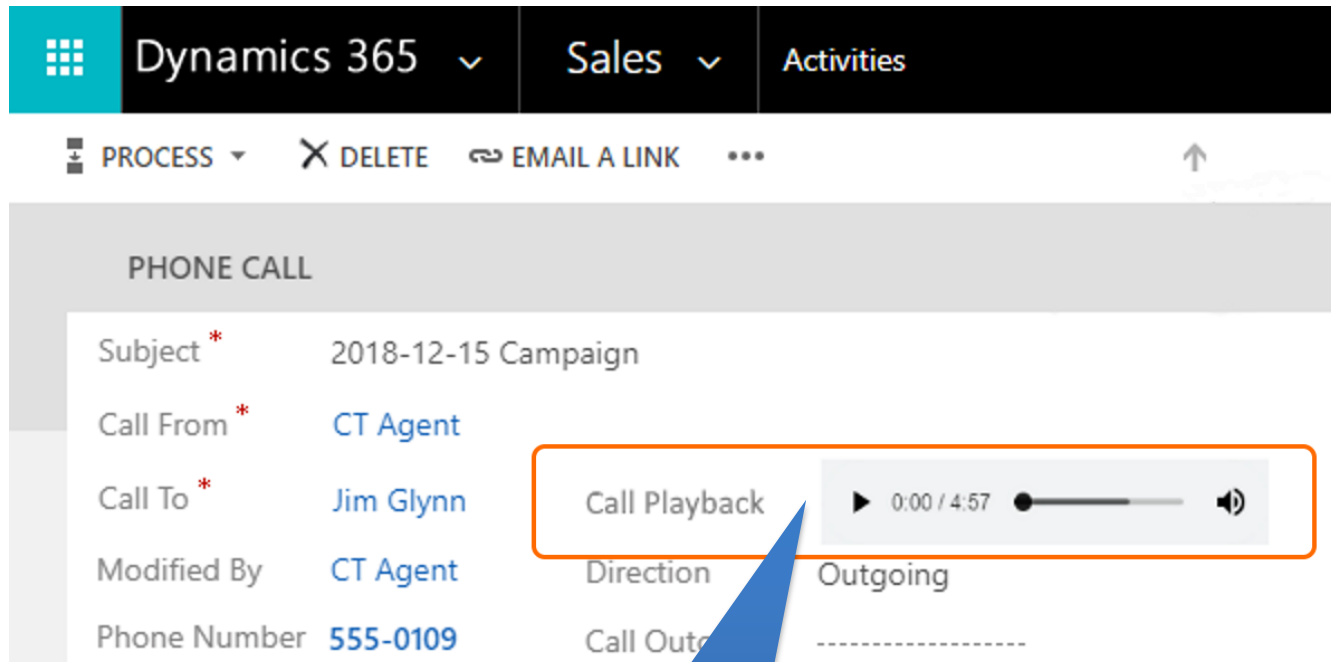
Select pre-recorded message to drop into voicemail

Automatically move on to next call – Huge time savings



# Call Tagging option

Creates a link in CRM allowing you to listen to call recordings for that contact



The screenshot shows the Dynamics 365 interface for a 'PHONE CALL' record. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Activities'. Below the navigation bar, there are action buttons: 'PROCESS', 'DELETE', 'EMAIL A LINK', and a plus icon. The 'PHONE CALL' record details are displayed in a table-like format:

Subject *	2018-12-15 Campaign
Call From *	CT Agent
Call To *	Jim Glynn
Modified By	CT Agent
Phone Number	555-0109

Below the table, there are fields for 'Direction' (Outgoing) and 'Call Out' (-----). A 'Call Playback' button is highlighted by an orange box, and a blue callout points to it. The button includes a play icon, a progress bar showing '0:00 / 4:57', and a speaker icon.

Playback recording within  
your CRM

## All Features:

<http://dynamicstelephony.com/res/index.php/all-features/>

### Contact

#### **Dynamics Telephony EMEA**

Tel: +353 1 610 6837

Email: [dt\\_sales@dynamicstelephony.com](mailto:dt_sales@dynamicstelephony.com)

Website: [www.dynamicstelephony.com](http://www.dynamicstelephony.com)

#### **Dynamics Telephony U.S. & Canada**

Tel: +1 (603) 769 3041

Email: [dt\\_sales@dynamicstelephony.com](mailto:dt_sales@dynamicstelephony.com)

Website: [www.dynamicstelephony.com](http://www.dynamicstelephony.com)