Cirrus Product Documentation

Cirrus Call Manager for MS Dynamics 365 v1.0

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1 Document Control

1.1 Distribution List

Name	Role	Representing
Glen Blow	Author	Cirrus
Cirrus Customer	Recipient	Customer

1.2 Change Control

The document and its associated procedures, templates and diagrams are created and maintained by the Cirrus team. When a procedure must be changed, the CIRRUS team will record and agree the change with the Cirrus team manager and a note will inform all in the distribution list that a change has occurred. The Cirrus team will periodically update this document to reflect agreed changes.

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1.3 Amendment Record

Version	Date	Status	Comments
1.0	26 Sep 2017	Issued	Final Published Version

2 Cirrus Call Manager for MS Dynamics V1.0

App Name: Cirrus Call Manager for MS Dynamics

Description: The Cirrus Call Manager is a Dynamics 365 add-on application which is integrated with the Cirrus Contact-Centre-as-a-Service (CCaaS) platform.

- automatically launching a caller's record when they call in
- presents all matching accounts, contacts and leads if the caller's number matches more than one record
- enable the colleague to search for the caller if no match to prevent duplicate records being created
- One-click action to create a new account, contact or lead if the caller is not known within the MS Dynamics database
- providing a one-click button for calling an account, contact or lead

The application enhances staff productivity and data capture accuracy by:

Staff collaboration is also increased by automatically attaching the call recording* to the phone call record natively in MS Dynamics 365; allowing for teams of colleagues to listen to previous calls rather than having to ask them for details of prior contacts.

Features:

- Automated presentation of a caller's record
- Enhanced search for caller's record(s)
- Create an account, contact or lead on the fly when handling a new enquiry
- One-click to dial a contact
- Efficiently log notes during a call
- Option for automatically attaching the call recording* to MS Dynamics phone call activity record

This feature requires call recording to be enabled on your Cirrus service(s). Please contact your Cirrus Client Success Manager if you require more information or assistance.