TelephoneIntegration (TI)

Connecting your phone system to Microsoft Dynamics 365 has never been easier!

Whether it is about having all calls tracked or just about dialing out of Dynamics 365 easier - there is more than one good reason for having your phone system connected to Dynamics 365.

How does it work?
The main user interface is provided by a Balloon pop-up. It contains all the necessary functionalities to deal with incoming and/or outgoing calls.

Call details (duration, direction, name, time…) are automatically displayed if an incoming call is detected. The context menu provides several Dynamics 365 functionalities, such as

- Open a Dynamics 365-record
- Create a new record (e.g. Contact)
- Create a Dynamics 365 activity

The integrated Dynamics 365 Search allows you to search Dynamics 365 records in the balloon. This allows **starting a call directly from within the balloon.**

Additionally, an outgoing call can be initiated in many different ways:

- By simply clicking on the number **(Click2Dial)** or with a click on the '**Call number**'-**button** in the command bar
- From within the balloon simply by entering the phone number
- Using the **clipboard integration,** numbers may be copied from e.g. e-Mail-signatures
- 'Dialing from related records' enables you to call phone numbers from related records, e. g. call directly from an opportunity

Additional features
- **Call statistics** inside Dynamics 365 track every call.
  This allows you to analyze your calls based on Dynamics 365 dashboards.
- The **PowerDialer supports** dialing lists.
  Dialing lists are created directly from campaign activities
  or power dialing entities in Dynamics 365.
- TI supports **Unified Service Desks (USD).**
  Instead of opening Dynamics 365 records in your browser, the Dynamics 365 records
  (contact/account/lead) are opened in the USD Client.
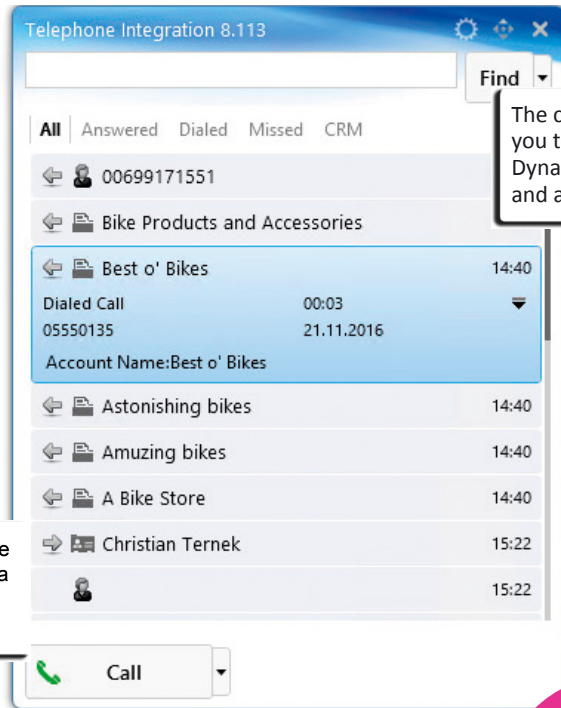
The context menu allows you to open and/or create Dynamics 365 records and activities.

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Find ▾

All | Answered | Dialed | Missed | CRM

⬅ 👤 00699171551

⬅ 📄 Bike Products and Accessories

⬅ 📄 Best o' Bikes   14:40
Dialed Call   00:03   ▾
05550135   21.11.2016
Account Name:Best o' Bikes

⬅ 📄 Astonishing bikes   14:40

⬅ 📄 Amuzing bikes   14:40

⬅ 📄 A Bike Store   14:40

➡ 📇 Christian Ternek   15:22

👤   15:22

📞 Call ▾

Insert a number into the number field and start a call with a click on the [Call]-button.

Get your
FREE TRIAL
on AppSource or on
www.mscrm-addons.com!

Your benefits at a glance:

- Enhanced productivity thanks to PowerDialer, call statistics, Click2Dial and Screen-Pops
- Auto-create of activities
- Quick overview & easy editing/analyzing of all phone calls

The following interfaces are supported by TelephoneIntegration:

- Microsoft Lync/Skype for Business
- Support for connections via TAPI (requires TAPI driver)
- SIP Phone/SIP Client (connect via VoIP thanks to our built-in SIP Client wrapper)

- RingCentral
- Interactive Intelligence
- Simulation

TelephoneIntegration is available for:
Microsoft CRM 2011, 2013, 2015, 2016 Online / On Premise / Hosted (IFD), Microsoft Dynamics 365