

# Integrate your existing phone system into Microsoft Dynamics 365

## Key Features



### Click-to-Dial

Dial automatically when any phone field is clicked.



### Screen Pop

Quickly show caller information before a call is connected.



### Automated Call Logging

Rapidly add call notes with configurable log templates and wrap-up codes.



### CRM Screen Transfer

Easily share information and related objects with transferred calls.



### Click-to-Create a Case

Create a new case and relate it to a caller automatically.



### Intelligent Dialing

Connect successfully no matter what area or format phone numbers are in.



### Workflow Support

Flexible enough to adapt to unique and complex workflows



### Omnichannel Service and Sales

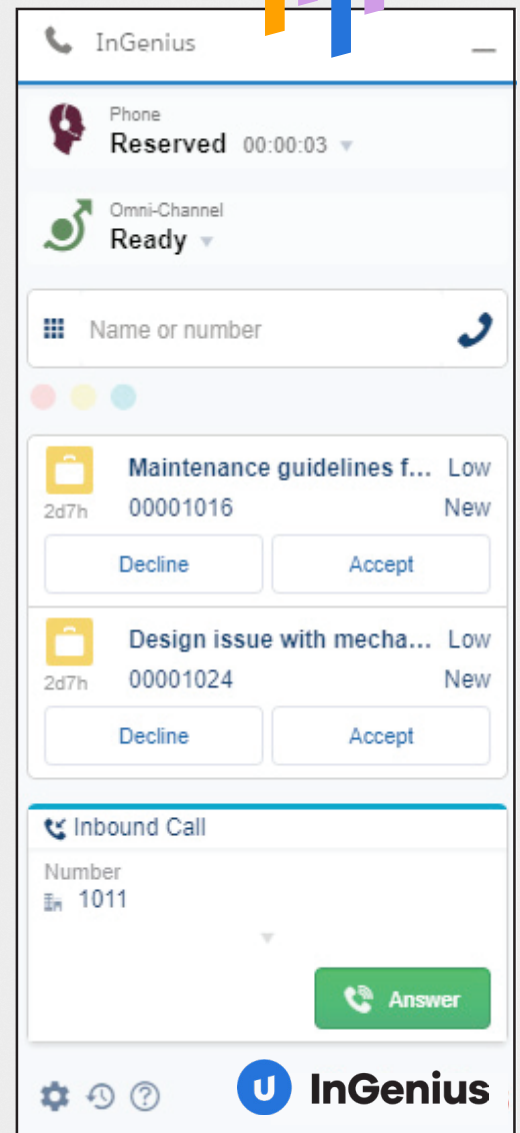
Enable blended agents with automated presence sync and a single UI.



### Simple Administration Within Your CRM

Use and manage InGenius from within your CRM.

**InGenius easily adapts to the unique CRM and telephony workflow requirements of different organizations.**



## Supported Products

- Microsoft Dynamics 365 online and on-premise
- Microsoft Dynamics 365 Channel Integration Framework (CIF)
- Unified Service Desk (USD) for Microsoft Dynamics 365

## Supported Phone Systems

- Asterisk
- Avaya
- Cisco
- Genesys
- Mitel
- Twilio





## Enterprise Proven

Choose a solution with the stability and scalability used by Fortune 500 companies. InGenius needs no desktop install, centralizes user management and simultaneously integrates with multiple phone systems. Your project is guaranteed with a no-risk trial.

## Secure

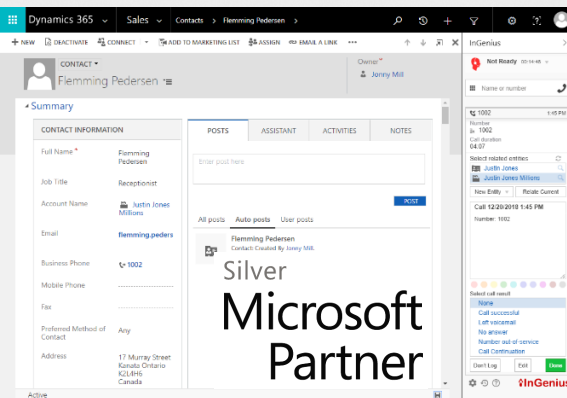
Keep your information secure with infrastructure designed to protect to the highest standards. With Upland InGenius, all data stays within your firewall and no access is needed by the computer telephony integration server.

## Flexible

Decide how you want computer telephony integration to work for your contact center. Use advanced configuration capabilities with your existing call queues, routing, IVR and workflows to easily fulfill your unique requirements.

## Experienced

Access unmatched expertise on connecting telephony and CRMs. Upland InGenius is focused solely on computer telephony integration and has a team of experts dedicated to innovating next generation CTI within a fully-owned technology stack.



## InGenius Innovates with Microsoft

InGenius is a published app on Microsoft AppSource and a Silver Microsoft Partner member.

The InGenius team has a commitment to continuous innovation with Microsoft Dynamics 365. The latest features include support for Dynamics 365 Channel Integration Framework (CIF) and Unified Service Desk for Microsoft Dynamics 365.

**World-class contact centers choose InGenius to drive agent productivity**

BOS



**For more information on Upland InGenius,**  
visit [uplandsoftware.com/ingenius](http://uplandsoftware.com/ingenius)

**Upland Software** helps organizations just like yours increase agent productivity and earn happier customers with a seamless connection between your Avaya business phone system and your CRM. Equip your service, sales, and ITSM teams with the tools they need to drive customer satisfaction today!

