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Your company for MS-CRM ADD-ONS!

# WEBINAR

*"Telephone Integration for MS CRM - Design & Feature overview"*

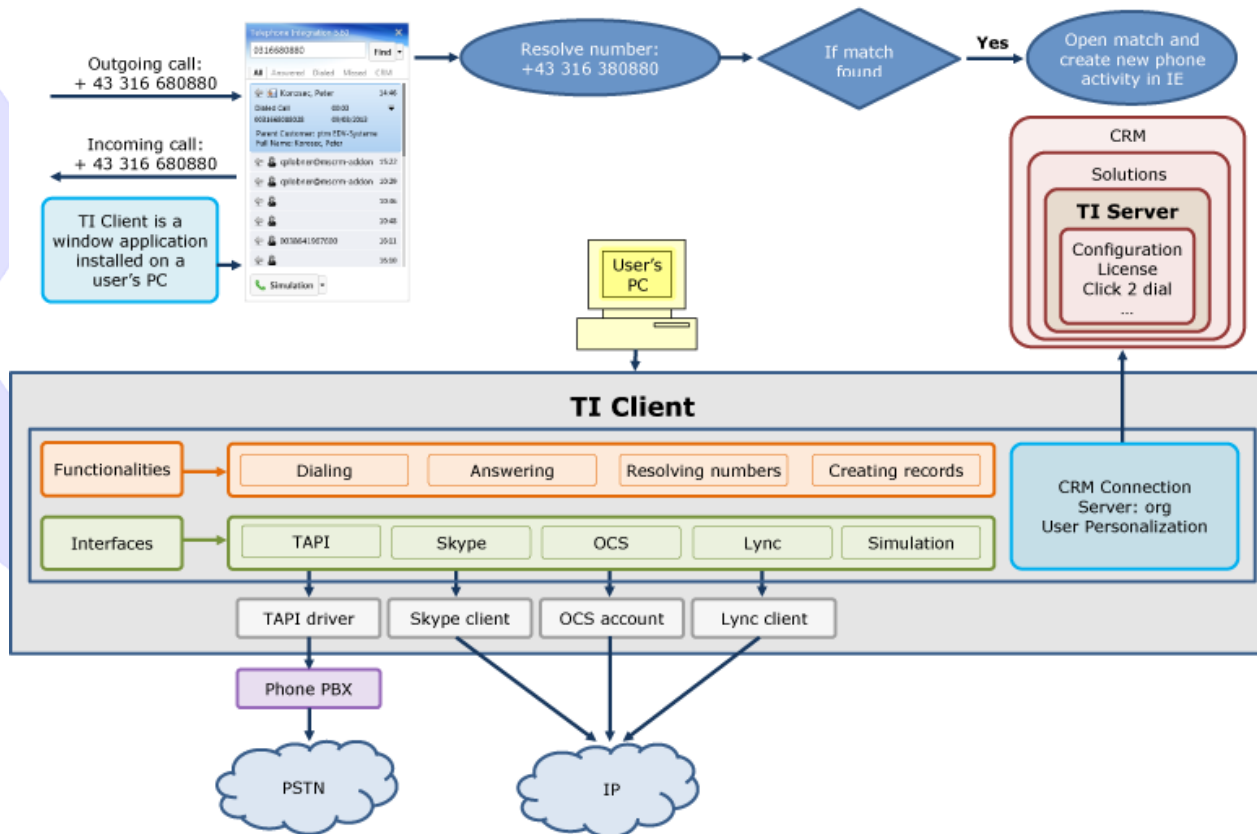
Atlanta, 11/13/2013

Clint Higley

# How Telephone Integration Works

TelephoneIntegration for MSCRM 2011

Overview



# The User Interface (Handling phone calls)

- **Click-to-Dial** option in the commandbar.

- Dialing from **related records**.

- **Integrated Search** to search and dial from the balloon directly.

- **Call history** stored inside CRM for reporting purposes.

The screenshot displays the Microsoft Dynamics CRM interface for the account 'MSCRM-ADDONS.com'. The top navigation bar includes 'Microsoft Dynamics CRM', 'WORKPLACE', 'Accounts', and 'MSCRM-ADDONS.com'. The main content area shows the account overview with fields for 'Annual Revenue', 'No. of Employees', and 'Owner' (Michael Dohr). Below this is the 'ACCOUNT INFORMATION' section, listing details like 'Phone: +1 402 720 6066' and 'Primary Contact: Christian Ternek'. An 'ActivityPreview' pane on the left shows a list of recent activities, including emails and phone calls. A context menu is open over the account name, highlighting the 'Click2Dial' option. A 'Telephone Integration 6.2' dialog box is open in the foreground, titled 'SELECT THE NUMBER TO CALL', showing the account's phone numbers and the primary contact's information. The dialog box has 'Simulation' and 'CANCEL' buttons.

# Additional Features

- Campaign activity-integration:  
**Power-dialing**
- Call history
- **Lync-Chat integration:** Allows to track your lync conversations with CRM

The Predictive Dialer displays all available predictive dialing lists and their campaign descriptions. Furthermore, users can see the number of already processed, rescheduled, left, etc. calls of a list. Users can choose a list and start the call-processing.

Campaign Activities:						
Name	Parent campaign	Owner	All	Processed	Rescheduled	
Check InvokeScript on CrmBrowser	WTF is this campaign	Peter Korosec	4	3		
CRM2013 launch follow up A	CRM2013 launch follow up	Peter Korosec	4	0		
pure horror 2013	WTF is this campaign	Peter Korosec	4	4	0	0

The Predictive Dialer-header in the call-window contains details about the contacted record and the predictive dialing list as well as options for the pre- and post-processing of the call. Additionally, the campaign description can be displayed and users are able to take notes within the call-window.

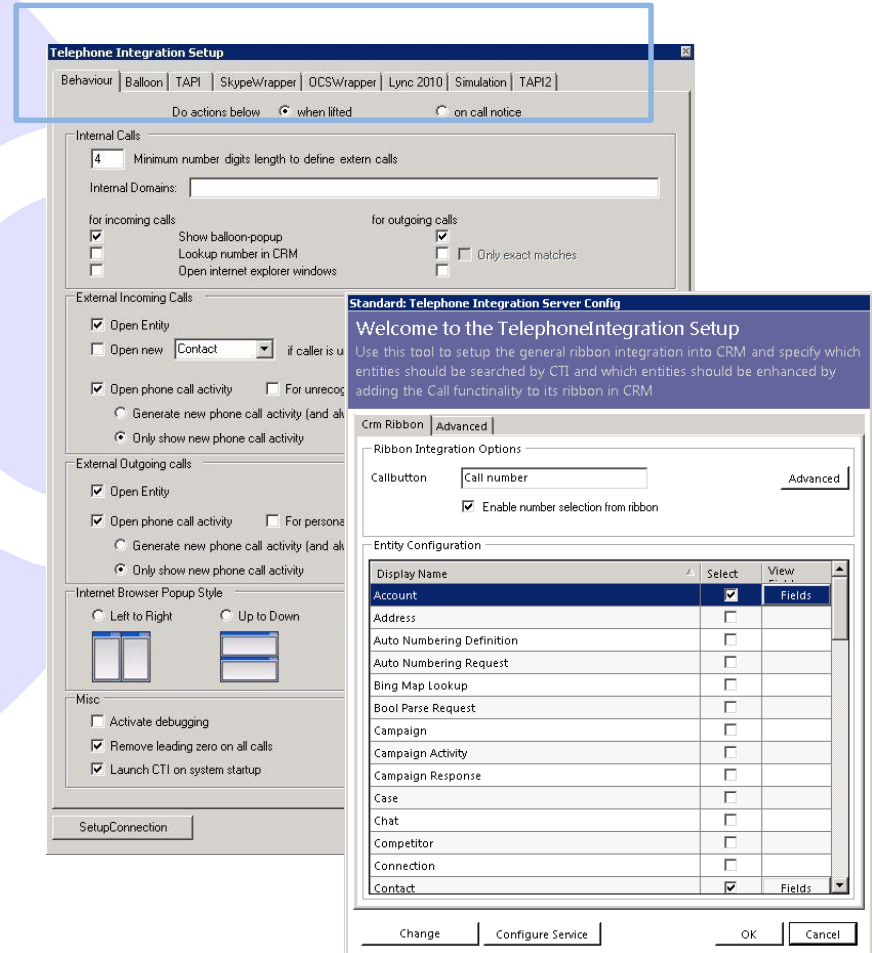
call 2013 - Online customers

Priority	Due	Status*	Owner*
Normal	--	Open	Peter Korosec

Update will take place soon  
Follow up with update instructions

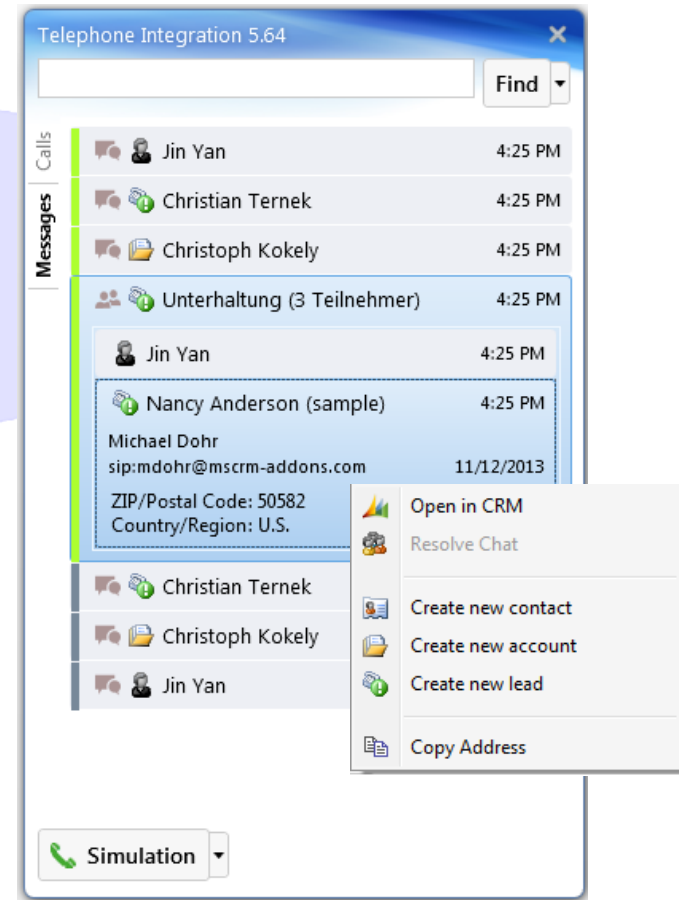
# Installation / Configuration

- The Server and Client are a simple msi-installation that imports the solution into your CRM.
- After installation of the Client and Server components you are ready to use the TI balloon or the click to dial button in CRM to make phone calls
- There are several ways that TI can interface with your phone system:
  - TAPI
  - Skype
  - OCS
  - Lync



# The Future of Telephone Integration

- **Re-design of UI to fit CRM 2013 design**
  - Lync chat integration integrated in user interface
- Improvements on Call-history to simplify reporting
- Extending list of compatible providers (VOIP)



# Thank You


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<http://www.mscrm-addons.com/Support/Webinars.aspx>

## Resources:

- You can find us on the web at <http://www.mscrm-addons.com>
- Help-Center (Live-Chat, Support): <http://www.mscrm-addons.com/Support.aspx>
- Don't forget we have an awesome blog at <http://blogs.mscrm-addons.com/>, you'll find it to be a helpful resource!

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# Q&A

- If I do not get to your question due to time limitation expect an email from us with the answer!