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Your company for MS-CRM ADD-ONS!

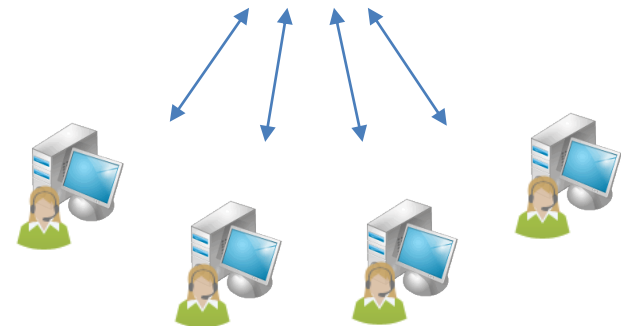
Connect your phone system to Microsoft Dynamics CRM
Values & Benefits

Why connect your phone to CRM?

- **Track phone calls (inbound and outbound)**
 - Create phone call activities
 - Create CRM records
 - Contacts, Accounts, Leads
 - Opportunities, Cases
- **Caller recognition**
 - Identify Caller in CRM –System
 - Screen-Pop
- **Simplify dialing**
 - Click2dial
 - Power-dialing (To-Do lists)
- **Call statistics**
 - Report of Call times, duration, number of calls...
 - Gamification



Computer Telephony
Integration

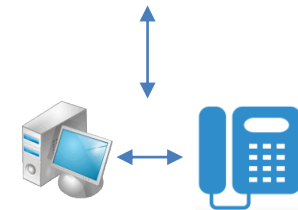


Telephone Integration for Microsoft Dynamics CRM

How it works

- **Server: CRM solutions**
 - Global Configuration
 - Click2Dial, Licensing
 - Call statistics, Call analysis
- **Client: Bridge between phone and CRM on user-PC**
 - Perform calls / react on incoming calls
 - CRM-specific operations
 - Create records (activities, leads, contacts, ...)
 - Integrated CRM-Search,...
 - Hosts PowerDialing Lists
- **Supported Phone Systems**

 Microsoft Dynamics CRM



TI-Client



Phone - system

Power-dialing

Empower your inside-sales / telemarketing teams by creating calling lists and providing an efficient Workspace to work on those lists.

Examples & How to Create Calling lists?

- CRM campaign activities
- PowerDialing-List (new entity)

Whats can be defined on a calling list?

- Users or Team assignment
- Script
- Time Limits, Auto-dial,...

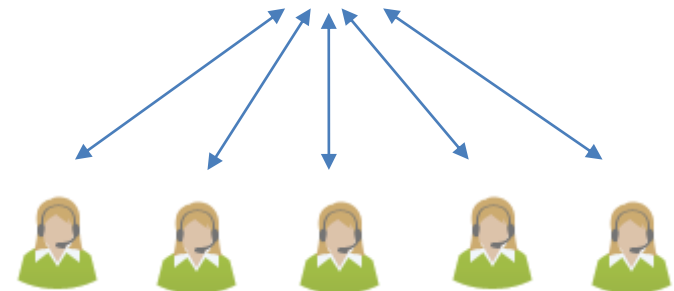
The Power-Dialing Workspace

- Efficient dialing in 3 steps
 - Pre-processing: Prepare for call
 - Calling: Dial & Talk
 - Post-processing: save information to CRM



Call-lists defined in CRM

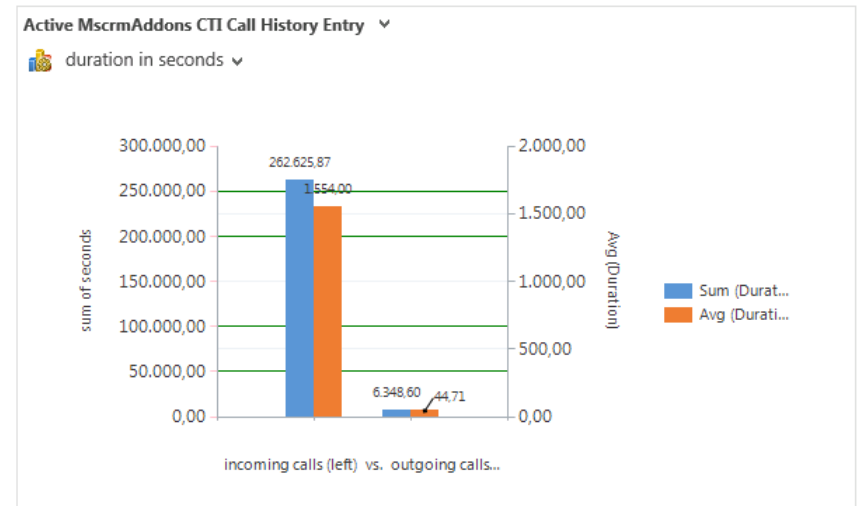
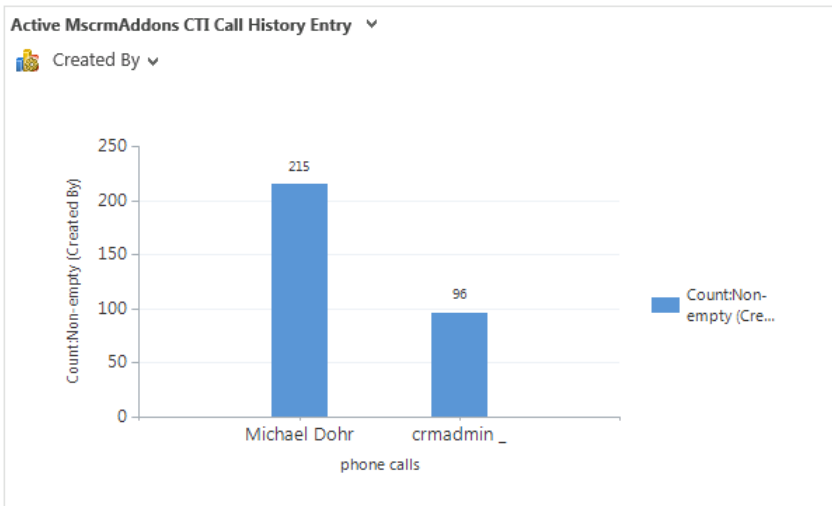
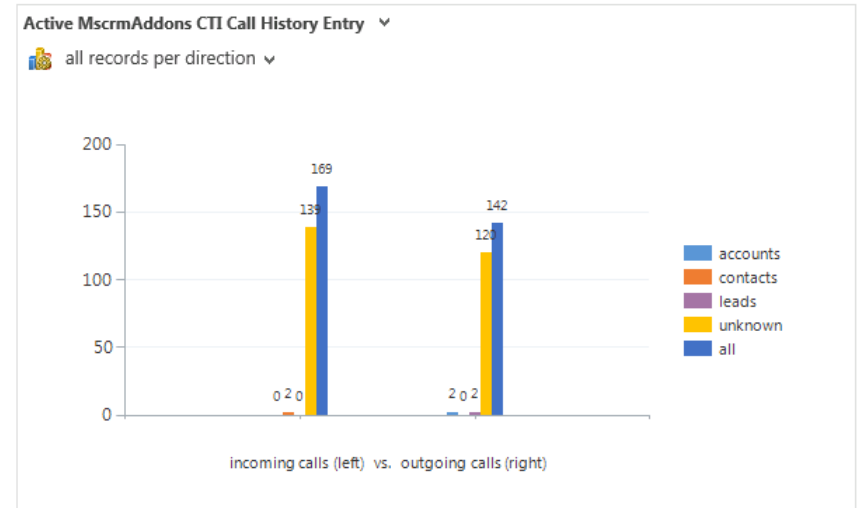
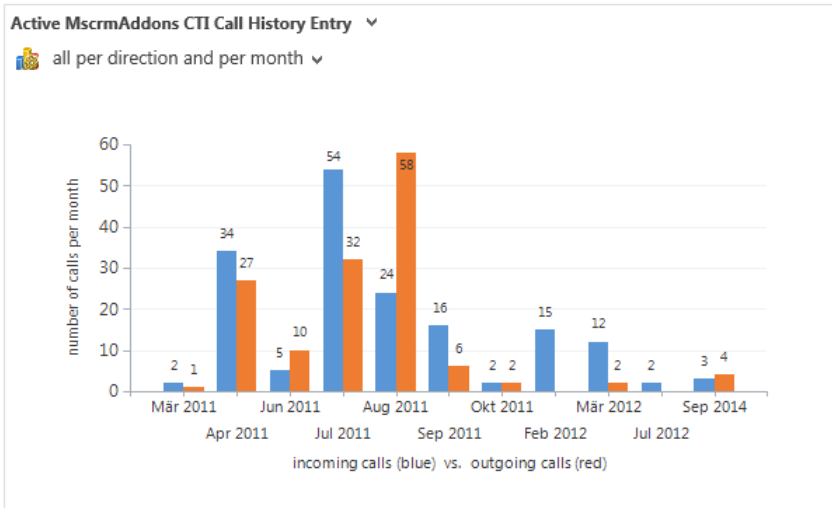
- 📞 End of year Offering
- 📞 Key Customers
- 📞 Web-registrations (autofilled)
- 📞 Event-followup
- 📞



Call Statistics / Call Analysis / Gamification

All calls are stored inside the CRM database and can be analysed using CRM-Dashboards or Advanced finds.

Telephone Integration Overview ▾



Demo Part 1: the main UI and Call Handling

Topics covered:

- The User Interface
- Incoming Calls: Caller Recognition & Screen pops
- Outbound Calls: Click2Dial from CRM, Search feature inside Balloon

Demo 2: Call Statics Dashboard

Topics covered:

- Show the different Statics and Analysis via the TI dashboard

Demo Part 3: PowerDialing

Topics covered:

- How to create a PowerDialing list from an advanced find
- Using the PowerDialer to make several Phone calls

Roadmap



- **CRM 2016 Support**

Support of CRM 2016 On-Prem and Online

Scheduled: Q4 2015



- **SIP Integration**

Support for SIP phones

Scheduled: Q4 2015



- **Design Update**

New UI of Client component & Settings

Scheduled: Q1 2016



Thank You


Feel free to join our upcoming Webinars!


<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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