



mscrm-addons.com

Your company for MS-CRM ADD-ONS!

TelephoneIntegration for Microsoft Dynamics 365

Michael Dohr, COO | michael.dohr@mscrm-addons.com

Telephone Integration: connect your phone system to Dynamics 365



Capture & Track phone Calls

- Caller Recognition /Screen-pops
- Create activities (Phone Calls, Appointments, Emails...)
- Create records (Cases, Opportunities, Leads,..)
- Call Statistics & Call Analysis



Simplify Dialing

- Click2dial from phone fields or CommandBar
- Call from related records(e.g. Quotes, Opportunities, Cases)
- Power-dialing: Workspace for efficient calling of lists

Supported Phone Systems



Demo:

- Phone Test Tool: Check compatibility of phone System
- Receive inbound call: Caller recognition & Screen Pop
- Create record and phone call activities
- Call Back using Click 2 Dial
- Call statistics
- Power Dialer for outgoing communication

Installation & Configuration

Components

Server:

- Solutions: Managed Solution(s)
 - Click 2 Dial Capabilities
 - Call Statistic entities
 - Global Configuration
 - Licensing

TI – Client:

- Installed on all Clients that require TI

Getting Started: (~ 1- 2h)

Server:

- Microsoft AppSource (Online)
- Download (OnPremises und Online)
 - MSI-Installer including service-configuration

Telephone Integration Client:

- MSI-Installer (Download)

Compatibility-Test - Tool

Thank You