

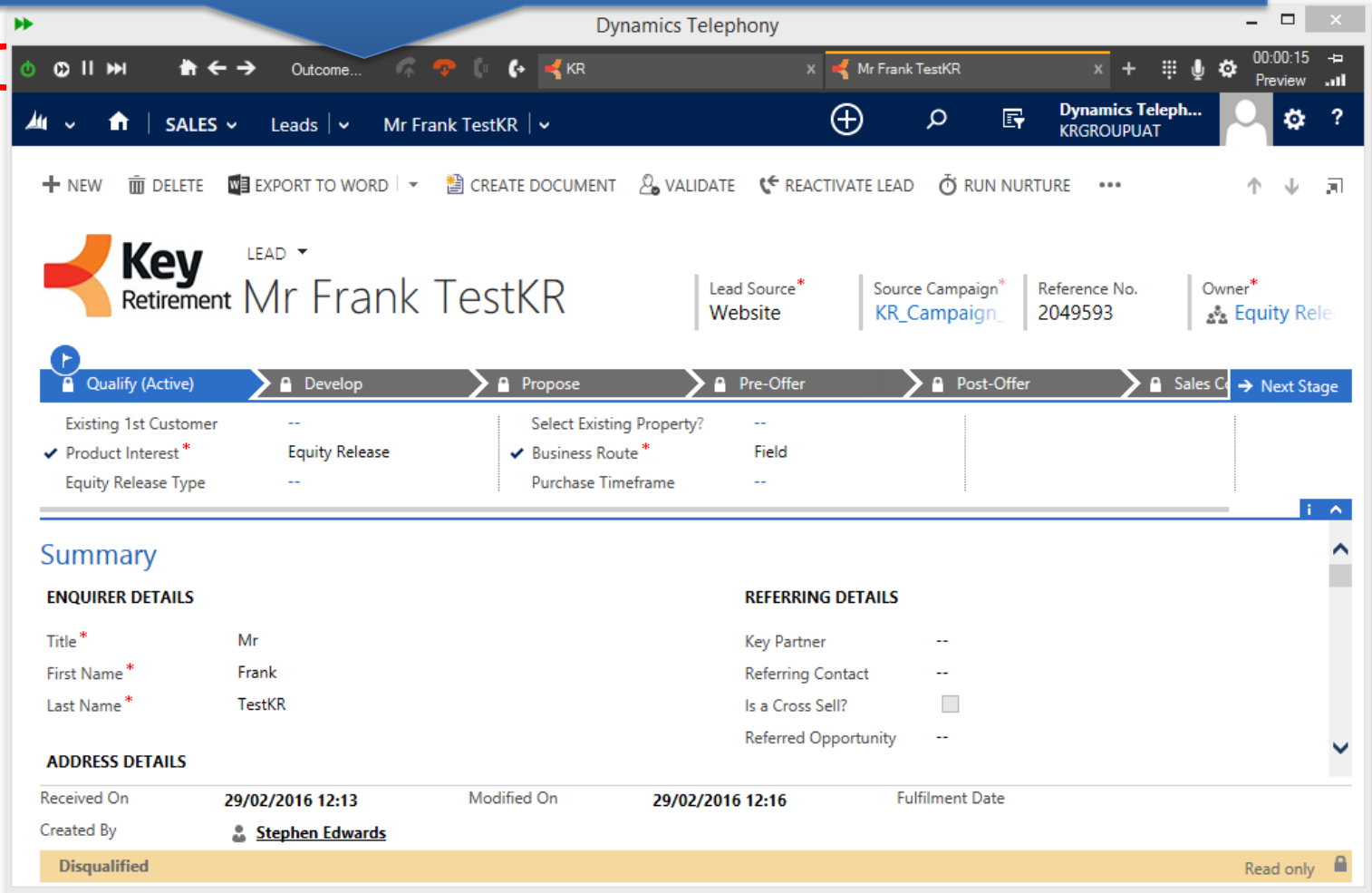


# **Dynamics Telephony**

Compatible with all telephone systems.

Available to download from MS App source

Dynamics Telephony toolbar blends beautifully,  
and actually results in MORE space for Dynamics 365



**Key Retirement** LEAD **Mr Frank TestKR**

Lead Source\* Website | Source Campaign\* KR\_Campaign | Reference No. 2049593 | Owner\* Equity Release

Qualify (Active) > Develop > Propose > Pre-Offer > Post-Offer > Sales > Next Stage

Existing 1st Customer -- | Select Existing Property? -- |  
✓ Product Interest\* Equity Release | ✓ Business Route\* Field |  
Equity Release Type -- | Purchase Timeframe -- |

### Summary

| ENQUIRER DETAILS |        | REFERRING DETAILS    |                          |
|------------------|--------|----------------------|--------------------------|
| Title*           | Mr     | Key Partner          | --                       |
| First Name*      | Frank  | Referring Contact    | --                       |
| Last Name*       | TestKR | Is a Cross Sell?     | <input type="checkbox"/> |
|                  |        | Referred Opportunity | --                       |

| ADDRESS DETAILS |                  | Fulfilment Date |                  |
|-----------------|------------------|-----------------|------------------|
| Received On     | 29/02/2016 12:13 | Modified On     | 29/02/2016 12:16 |
| Created By      | Stephen Edwards  |                 |                  |

Disqualified Read only

# Call log, screen pop & Click-to-dial

Pop contact, lead or account card.

Inbound call notification popup with callers name

Hangup, hold and transfer controls during calls

Anywhere you see a phone number in CRM, click on it to dial it !

Every inbound and outbound call is logged in CRM

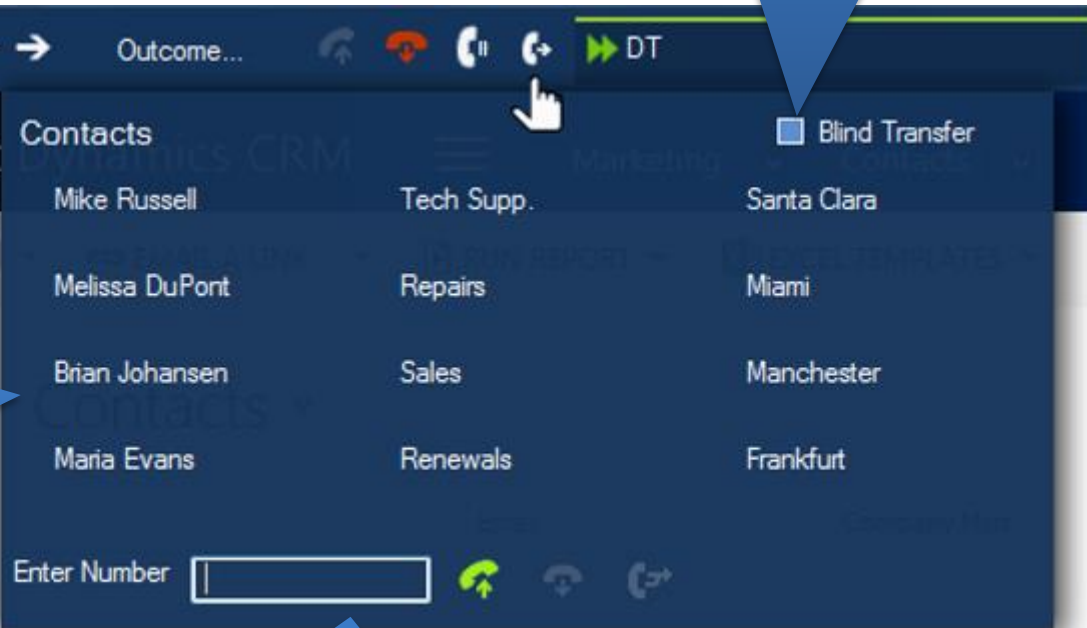
The screenshot displays the Microsoft Dynamics CRM interface. At the top, a navigation bar includes 'Outcome...', 'DT', and a user profile for 'Dorothy Maysonet'. Below this, the main header shows 'Microsoft Dynamics CRM' and tabs for 'Marketing' and 'Contacts'. A call notification popup is visible on the right, titled 'VIP inbound Maysonet', with details: 'State: incoming', 'phonecall: 4125551212', and 'contact: Dorothy Maysonet'. It features 'Answer' and 'Reject' buttons. The contact card for 'Dorothy Maysonet' is shown on the left, with a 'CONTACT' dropdown and a 'Business Phone' field containing the number '4125551212'. A 'Summary' section is also visible. On the right, the 'ACTIVITIES' tab is selected, showing a list of call logs. The first entry is 'Dorothy Maysonet Dynamics Telephony Click To Dial Call: Send Info Completed by Padraig McTiernan Today'. The second entry is 'Dorothy Maysonet Dynamics Telephony Incoming Call: Completed by Dynamics Telephony'.

# Built-in Contact Directory

Call controls and handy directory panel built in to CRM.

Supports conference & transfer (blind or consult)

Personal OR group directory of favorite contacts



Ad-hoc dialing

# Call Outcome Settings

All outcomes tracked and reported IN Dynamics 365

Unlimited outcomes can be defined & customised

Examples...

## Managed callbacks

Set Date/Time for "Callback"

17/10/2016 15:55

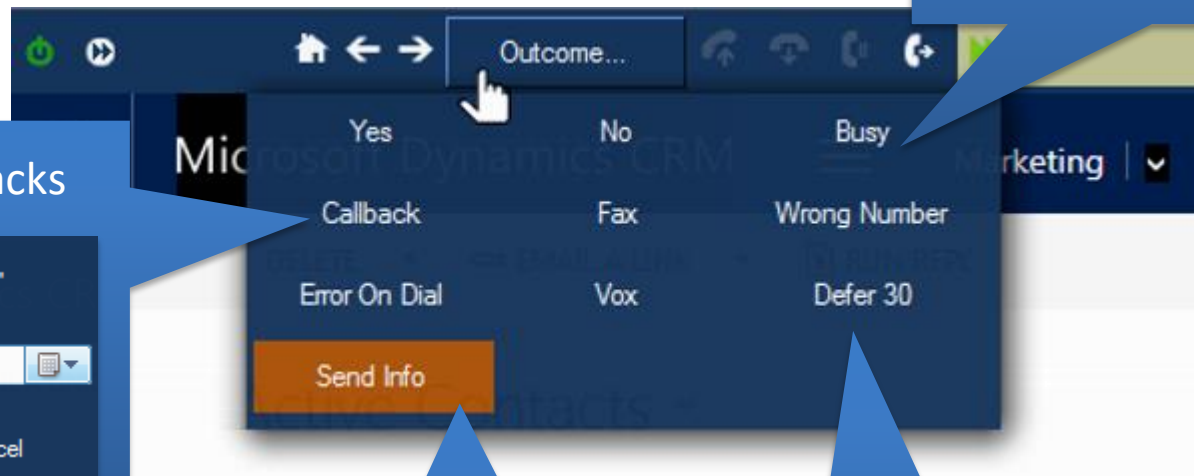
OK

Cancel

Trigger workflow to send email with attachment  
AND set up callback for 2 days time

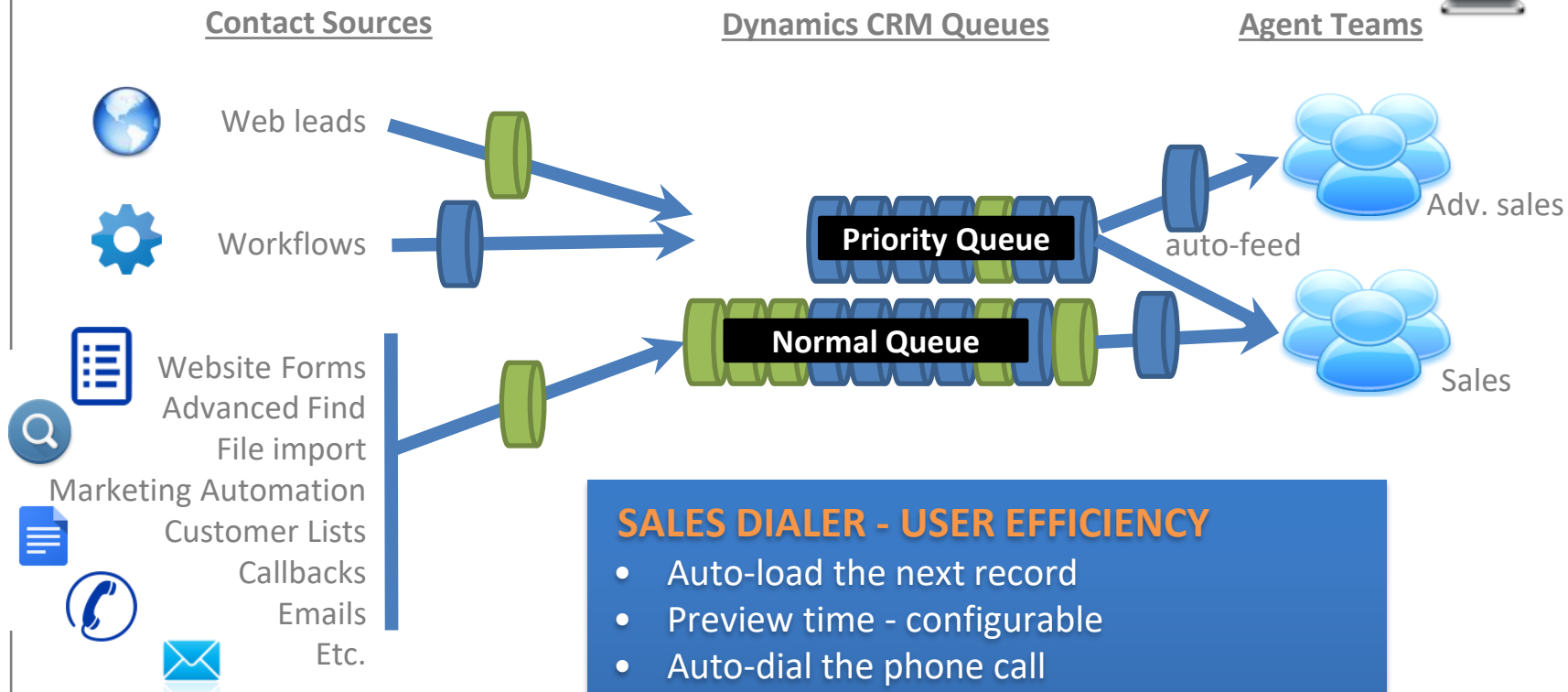
Automatically call the customer back in 30 minutes

Busy & No Answer are automatic retries – no need for agent to select them.



# Sales Dialer embedded in Dynamics CRM

Shared / personal, prioritized lists of entities (leads, opportunities, etc.) that Dynamics Telephony EMBEDDED PROGRESSIVE DIALER auto-feeds to a user, or a team of users



## SALES DIALER - USER EFFICIENCY

- Auto-load the next record
- Preview time - configurable
- Auto-dial the phone call
- Auto-reschedule no answers, busies
- Outcomes – customizable, unlimited
- Workflows - One-click business automation
- Wrap time - configurable
- Callbacks – same agent or team

# Reporting, in Dynamics 365

Comes with a suite of  
Dynamics Telephony  
Dashboards

Display in CRM

Historical & Real-time

See all agents real-time status, including who  
they are talking to

Microsoft Dynamics CRM | MARKETING

## Agent Status Dashboard - Realtime

| Agent   | Call State | Agt State | Dur   | Regarding  | Cust.     |
|---------|------------|-----------|-------|------------|-----------|
| O'Grady | preview    | ready     | 19:39 | Campaign 1 | M Collins |

Coste

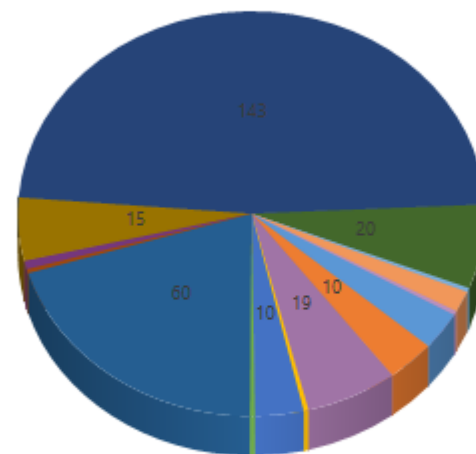
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## Dynamics Telephony - Call Outcome Analysis

Dynamics Telephony - Call Outcome Analysis - This Year



- Callback
- Bad Number
- Busy
- Defer
- Contact Made
- InboundCall
- Voicemail
- Wrong Number
- noanswer
- Reject
- Send Info
- Yes

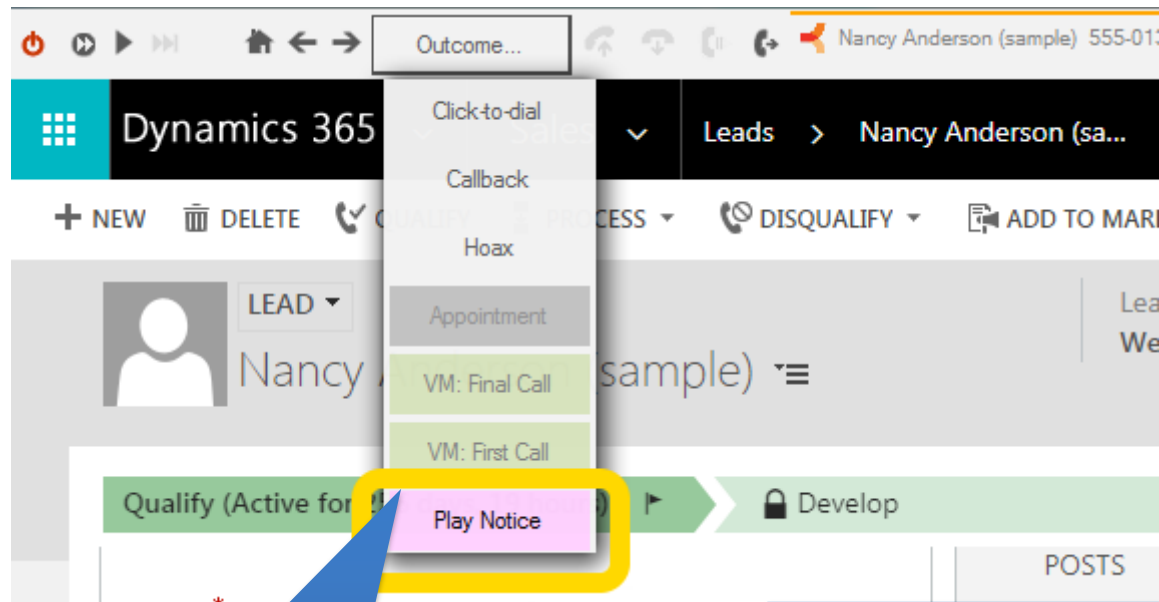
SAVE AS NEW SET AS DEFAULT REFRESH ALL

Dashboards ▾

- Dynamics Telephony Dashboard - Agent RTD
- Dynamics Telephony Dashboard - This Month
- Dynamics Telephony Dashboard - This Week
- Dynamics Telephony Dashboard - This Year**
- Dynamics Telephony Dashboard - Today

# Voice-Drop option

Allows for pre-recorded messages to be left when the call goes to voicemail with just one click.

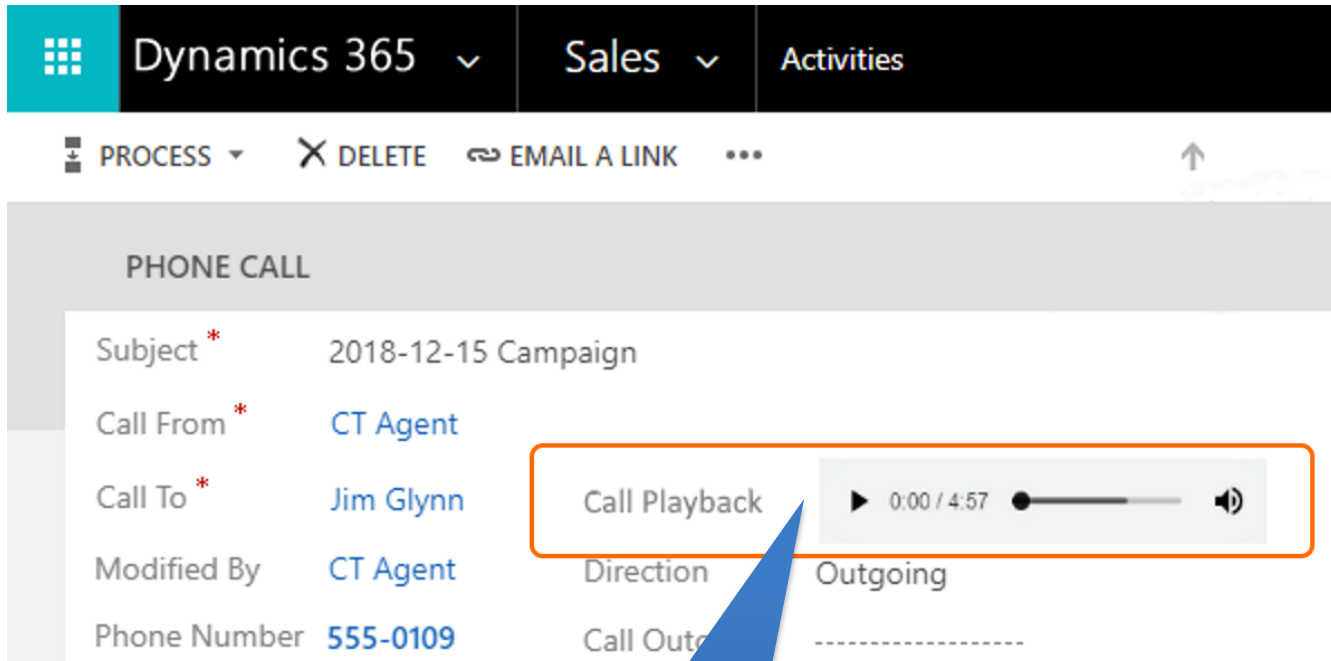


Select pre-recorded message to drop into voicemail

Automatically move on to next call – Huge time savings

# Call Tagging option

Creates a link in CRM allowing you to listen to call recordings for that contact



The screenshot shows the Dynamics 365 interface for a 'PHONE CALL' record. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Activities'. Below the navigation bar, there are action buttons: 'PROCESS', 'DELETE', 'EMAIL A LINK', and a more options menu. The 'PHONE CALL' record details are displayed in a table-like format:

|              |                     |
|--------------|---------------------|
| Subject *    | 2018-12-15 Campaign |
| Call From *  | CT Agent            |
| Call To *    | Jim Glynn           |
| Modified By  | CT Agent            |
| Phone Number | 555-0109            |

Below the details, there is a 'Call Playback' button with a play icon, a progress bar showing '0:00 / 4:57', and a speaker icon. This button is highlighted by an orange box. A blue callout arrow points from the button to a text box at the bottom of the image.

Playback recording within  
your CRM

## All Features:

<http://dynamicstelephony.com/res/index.php/all-features/>

### Contact

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