

# Five9 Adapter for Microsoft Dynamics 365

Enhance contact center agent productivity and customer service within a unified Microsoft desktop.

Harness the power of real-time customer data to drive greater business results by increasing agent productivity and improving customer service. Five9 Adapter for Microsoft Dynamics 365 combines contact center controls natively in a single, intuitive user interface to capture, view, manage, and share every customer interaction.

Agents no longer have to switch between applications to find the information they need. Five9 provides a single consistent experience optimized for your Dynamics environment, minimizing the learning curve and empowering agents to focus on the customer rather than the screen.

**“With Five9, we were able to double the amount of calls without having to increase our staff. Moving to the cloud was easy.”**

**Regent University**

With screen pops that blend directly into the Dynamics environment, give agents a complete picture of the customer before they engage. Five9 sends customer data to the agent desktop, simplifying their ability to personalize and maintain the customer journey.

## Route Customers to the Right Resource

Gain control over inbound interactions including calls, chat, social, and email with intelligent routing. Using skills-based routing and customer information from Dynamics, identify customer intent and streamline their journey by routing them to the right resource. The agent receives these insights to accelerate the path to the right outcome.

## Leverage a Powerful Outbound Dialer

Improve outbound operations with automated lead-management tools that help organize your sales funnel. Empower agents to focus on improving contact ratios and conversion rates — and closing deals. Five9 supports multiple outbound capabilities to help improve sales performance and agent productivity. Leverage outbound dialer capabilities with predictive, power, progressive, preview, and TCPA manual-touch dialing modes.

## Connect across Channels

Streamline digital interactions and reduce training requirements with a single interface for all interactions across voice, email, SMS, chat, and social messaging apps. This means you can transition customers seamlessly to the best-suited channels for resolving their issues. Five9 delivers customer intent and journey context with the customer interaction to give agents the insights they need to personalize service, plus tools to create exceptional digital-first experiences.

## Improve Agent Guidance

Achieve tangible ROI by using AI to help reduce agent time spent on each call, resulting in immediate cost savings. This also allows agents to significantly reduce time on after-call work.

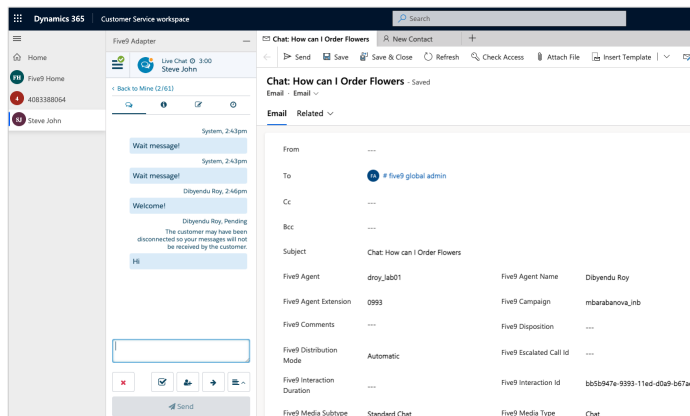
Five9 Agent Assist integrates seamlessly within the Dynamics platform, providing agents with a single UI to manage call controls, access Dynamics data, and use features including real-time call guidance, transcripts, and summaries.

## Benefits

- Accurate customer data and customer interactions
- Seamless agent experiences
- Delivery of relevant customer data to agent screens
- Quick deployment and easy management

## Features

- Single-pane UI with configurable screen pops
- Click-to-dial and click-to-SMS functionality
- Interaction handling controls
- Call history and recording



*In this view, an agent is working within Customer Service workspace managing multiple inquiries — chat and email — simultaneously with the ability to seamlessly switch between interactions.*

## Access Real-Time Data

Give contact center managers everything they need to monitor and measure performance, gain insight, and share successes with executive management using a suite of real-time and historical reporting tools. Identify the results of your efforts and continually improve staff resource management with real-time analytics and KPI tracking on all customer interactions.

You can also use dashboards and wallboards to provide real-time insights into developing situations so you can make proactive adjustments. Historical reports offer additional insights into agent performance across call types and unify customer history across your operations.

## Support Microsoft Functionality

Five9 Adapter for Microsoft Dynamics 365 helps you get more from your implementation through strong support for key Microsoft functionality.

## Channel Integration Framework v2

This framework works within multisession applications such as Customer Service workspace and Omnichannel for Customer Service. Seamlessly switch between channels to meet customers on their preferred connection. Enable agents to handle an omnichannel workspace for voice and digital interactions. Use the

## Outbound

- Predictive, power, progressive, and preview dialing
- Synchronization of customer lists and data

## UC Integration

- Consolidated CC and UC directory
- Click-to-call, transfer, or conference any UC user
- Seamless integration with Microsoft Teams

## Digital Engagement

- Voice (inbound/outbound)
- Self-service (IVR/IVA)
- Messaging (chat, SMS, social)
- Email

## Agent Assist

- Real-time guidance, reminders, call transcription, and summaries
- Automated after-call work
- Reporting on call topics based on conversations

## Administration

- Single control point for all channels
- Real-time analytics and historical reporting

anchor tabs to switch easily between multiple sessions to handle customer interactions within the Dynamics interface. Embedded notifications let agents know which interaction to address in real time to ensure customers are handled in a timely manner.

## Microsoft Teams UC Integration

Accelerate the path to first contact resolution while optimizing the customer experience. Customers gain confidence in your business as agents can connect directly to subject matter experts in real time using an embedded at-a-glance directory to see individual availability. Agents can easily identify the right expert, understand their availability, and click to contact them.

## Learn More

Explore how you can get the most from [Five9](#) and [Microsoft Dynamics 365](#).



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## About Five9

The Five9 Intelligent CX Platform provides a comprehensive suite of solutions for orchestrating fluid customer experiences and empowering agents. Our cloud-native, multi-tenant, scalable, reliable, and secure platform includes contact center; omnichannel engagement; Workforce Engagement Management; extensibility through more than 1,000 partners; and innovative, practical AI, automation, and journey analytics that are embedded as part of the platform. Five9 brings the power of people, partners, and technology to more than 2,500 organizations worldwide. Through this combination, Five9 supports customer needs from Day 1 to forever and delivers on our customer commitment: We keep our CX promise, so you can keep yours.

For more information, visit [www.five9.com](http://www.five9.com).

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