



Perfect SMS integration for your Dynamic 365 CRM



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Need for SMS Integration within Dynamics 365 CRM



95% SMS messages are opened and read within first 3 minutes of delivery on average.



36% SMS messages have click-through rate on average



209% of SMS marketing campaigns achieve higher response rate than emails.

**Increased
ROI**



**Time
Efficiency**



**Personalized Customer
Experience**

**Prompt based
Communication**

Key Features

Be Within CRM Ecosystem

Enables seamless communication, automated data capture, and efficient task completion by integrating SMS communication with CRM.



CRM Message Notification

Enable incoming message notifications in CRM to stay updated on customer messages and offer prompt responses.



Send Messages to Customer

Engage with customers by seamlessly sending and receiving messages within CRM, while monitoring message statuses on a unified dashboard.



Store Message History

Maintain message histories associated with each Record within Dynamics 365 CRM and easily track communication.



Automate Communication

Elevate customer engagement in by automating message! Send automated messages on CRM actions and offer personalized interactions.



Send Pictures to Customers

Create impactful visual communication with customers with support to send pictures directly through CRM.



Available for

Supported Versions

Dynamics 365

Microsoft Dataverse

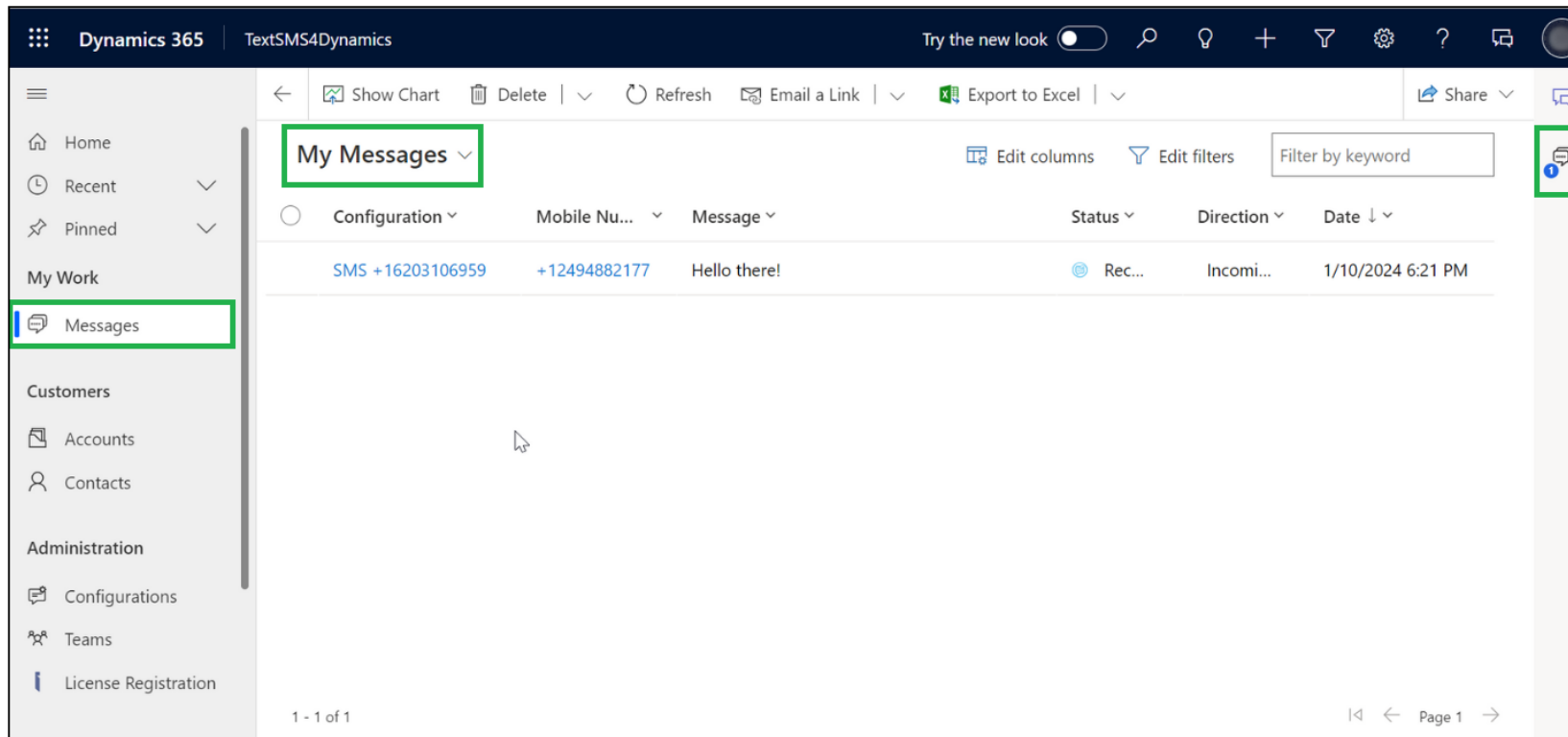


ONLINE

Deployments

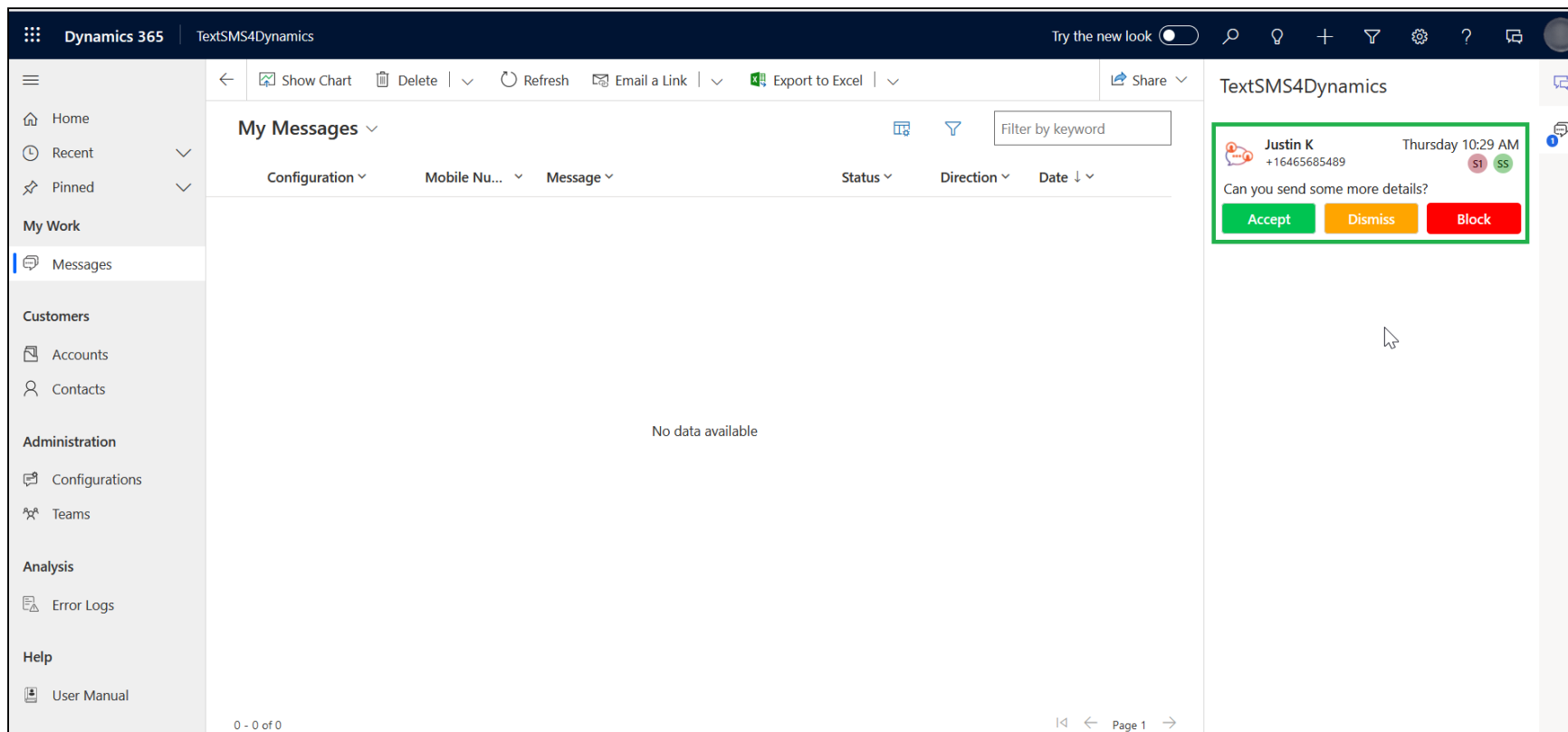
Message Notifications

Get notified of every incoming message within the CRM platform. Message notifications appear on a bubble on the right-hand side with the total count of unread messages.



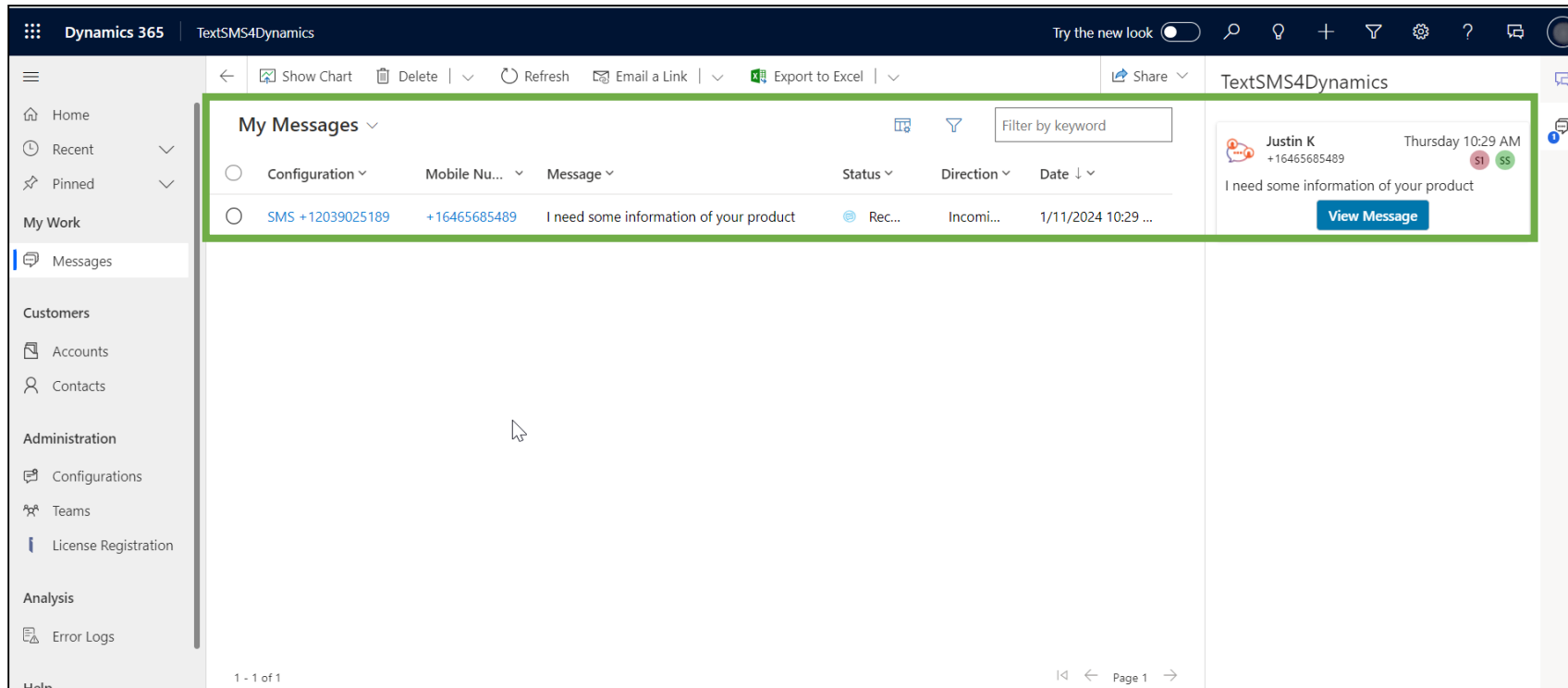
Accept/ Dismiss/ Block Messages

Users have the choice to Accept/ Dismiss/ Block a notification from unknown contacts and View Message from known contacts.



Messaging Conversation Manager in CRM

With TextSMS4Dynamics, integrate messaging service with CRM and enjoy the same experience of SMS in Dynamics 365 CRM.



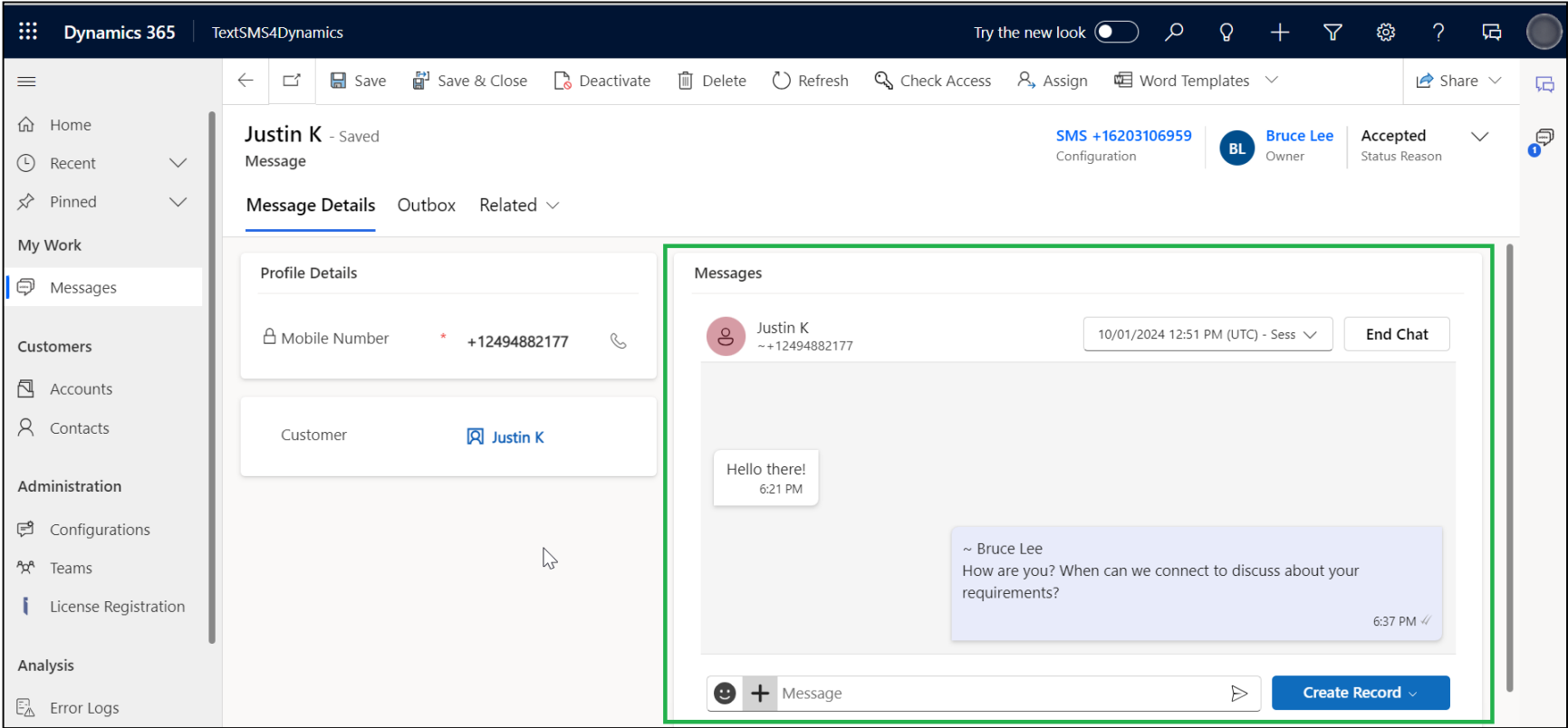
Mapping CRM Records

Map new message based on their mobile number, so that you can enjoy more informed and context-rich conversations as well as deliver personalized support.

The screenshot displays the Dynamics 365 interface for a message conversation. The left sidebar shows the navigation menu with options like Home, Recent, Pinned, My Work, Messages, Customers, Accounts, Contacts, Administration, Configurations, Teams, License Registration, Analysis, and Error Logs. The main area shows the message details for Justin K, with a green box highlighting the 'Profile Details' section. This section includes the mobile number +12494882177 and the customer name Justin K. The message history shows a conversation from Justin K at 10/01/2024 12:51 PM (UTC) and a response from Bruce Lee at 6:37 PM. The interface also includes a top bar with various icons and a bottom bar with a 'Create Record' button.

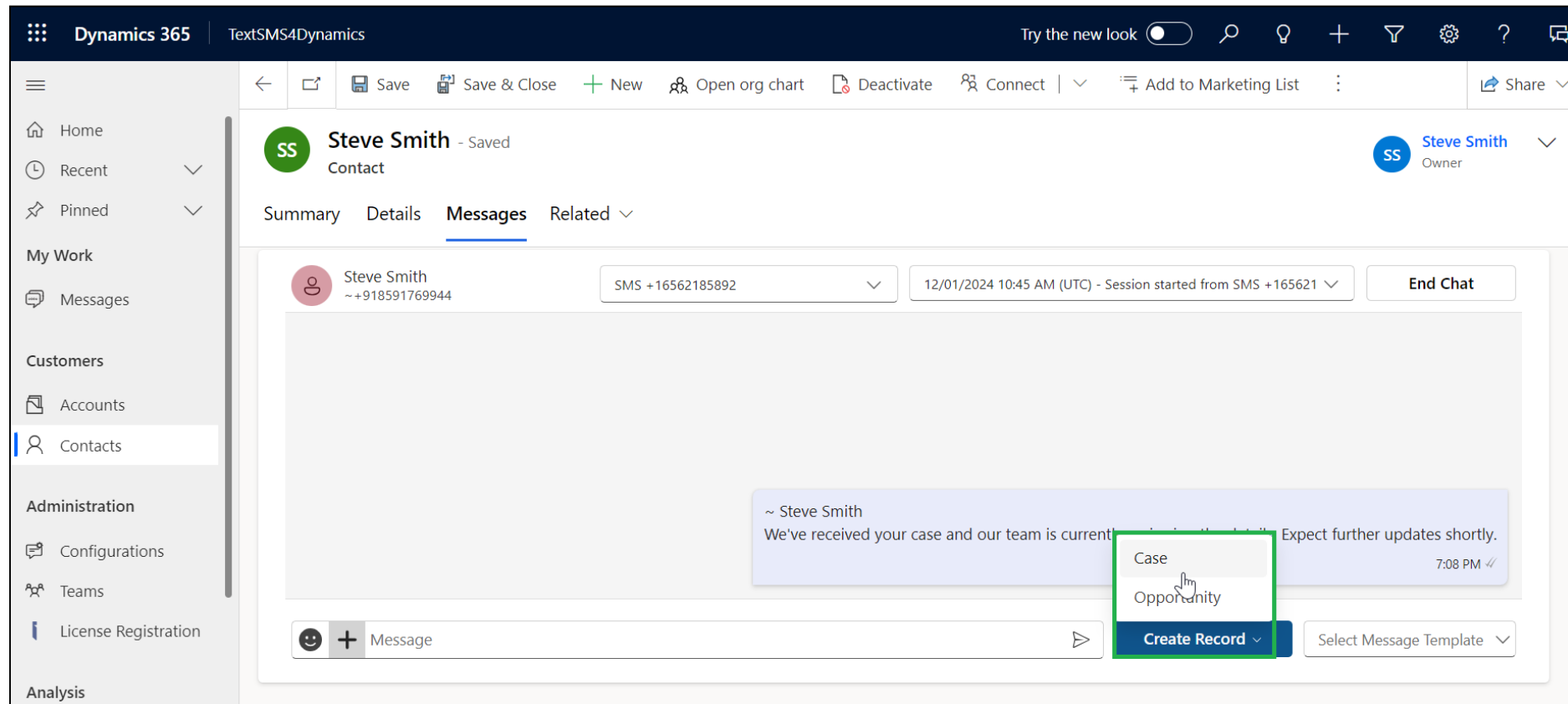
Communicate directly from CRM Records

Start messaging directly from CRM Records. Streamline the process of interacting with clients on a convenient and familiar channel, making it easier to manage customer relationships.



Create CRM Records from messaging

Create CRM records from conversations, whether in an Out-of-the-Box (OOB) entity or a Custom Entity.



Store History In Message Sessions

Users can maintain message history associated with each Record with Dynamics 365 CRM and efficiently track communication.

The screenshot displays the Dynamics 365 CRM interface for a contact named Steve Smith. The left sidebar shows navigation options like Home, Recent, Pinned, My Work, Messages, Customers, Accounts, Contacts, Administration, Configurations, Teams, License Registration, Analysis, Error Logs, and Help. The main area shows the contact's details, including a 'Messages' tab. A dropdown menu is open, showing a list of message sessions with timestamps and session status (e.g., 'Session started from SMS +16562185892', 'Session ended from SMS +16562185892'). The bottom of the interface shows a message input field with a 'Message' button and a 'Create Record' button.

Message Session History:

- 12/01/2024 10:45 AM (UTC) - Session started from SMS +16562185892
- 12/01/2024 10:45 AM (UTC) - Session ended from SMS +16562185892
- 11/01/2024 10:45 AM (UTC) - Session ended from SMS +16562185892

Message:

~ Steve Smith
We've received your case and our team is currently reviewing the details. Expect further updates shortly.
7:16 PM

Trigger & Send Automate Messages

Reduces manual effort, and ensures timely communications by setting up triggers and automating messages based on specific CRM events and actions.

The screenshot displays the Inogic CRM interface for setting up an automated SMS trigger. The main window is titled "Process: Send SMS to customer when lead is created" and "Create Outbox".

Details Section:

- Name:** Send SMS to (First Name(Lead)) (Last Name(Lead))
- Message Template:** Send SMS to customer when lead is created (highlighted with a green box)
- Free Form:** (Empty text area)
- Failure Reason:** (Empty text area)
- From:** SMS +16562185892
- To:** (Customer(Lead))

Additional Fields Section:

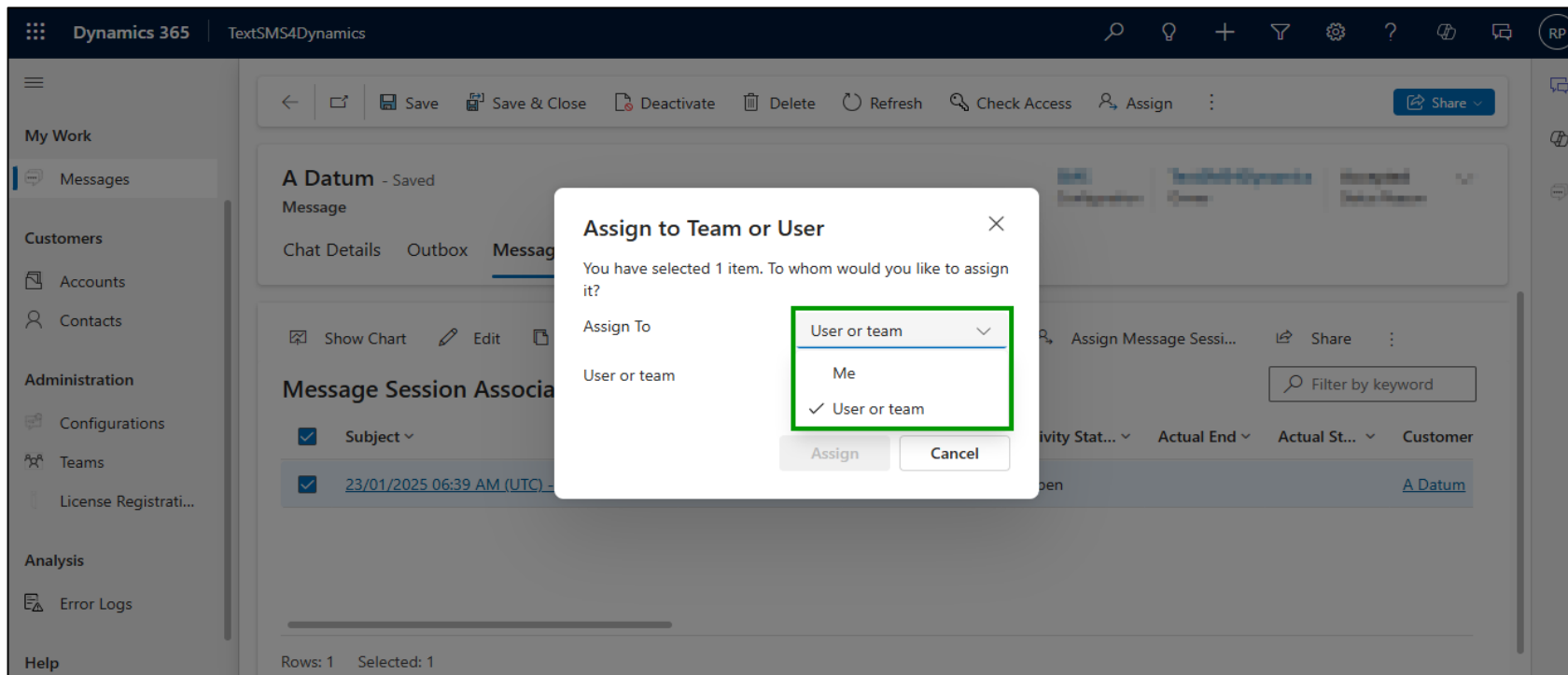
- Chat:** (Empty text area)
- File Details:** (Empty text area)
- Media URL:** (Empty text area)
- Mobile Number:** (Empty text area)
- Sid:** (Empty text area)
- Regarding:** (Lead(Lead))
- Owner:** (Empty text area)

Preview Panel (Right):

The preview panel shows a simulated SMS conversation. The top header indicates "Texting with 50 (SMS/MMS)". The message content is: "Sent from your Twilio trial account - Thank you for choosing Inogic ! We look forward to serving you and assisting with any needs you may have." (highlighted with a green box). The time is 4:13 pm. The bottom of the preview shows a keyboard with a "Text (SIM1)" input field.

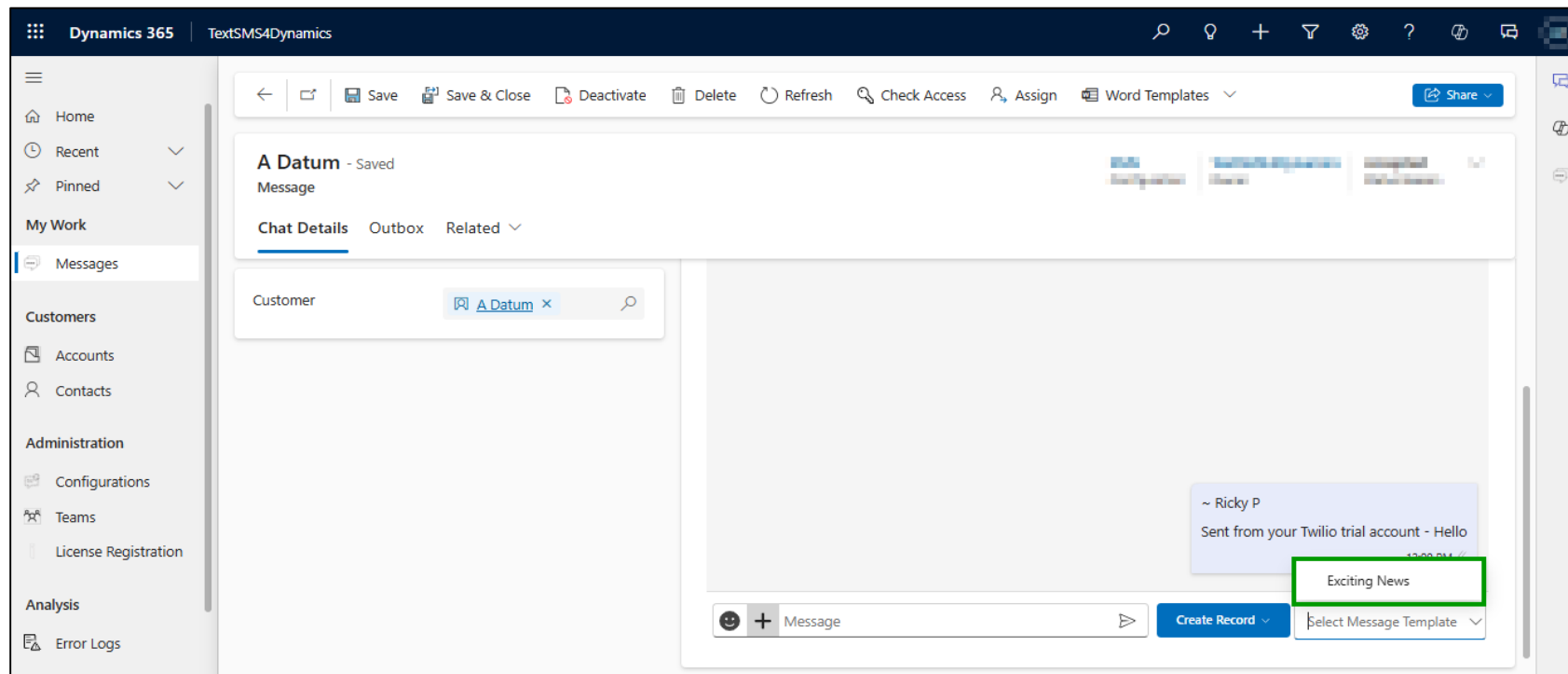
Reassign Chat

Easily transfer chat sessions between users or teams for seamless customer interactions. With just a few clicks, a user can reassign a chat within CRM, ensuring smooth communication even when team members change roles.



Global Message Template

Once you configure the global Message template, you can use it for all record types, here's how the message template appears from the sender's perspective when sent from CRM.



What's next

Get Started

In just 10 minutes!

Learn more about [TextSMS4Dynamics](#)

Get your TextSMS4Dynamics 15 Days FREE trial from our website or Microsoft AppSource

Email: crm@inogic.com

Why Us?



Quality Products

Ability to deliver quality solutions quickly and at affordable prices.



Latest Technology

Our apps are aligned to Microsoft release cycle, and we make use of the latest and greatest technology available at any point.



Partner and Customer led Product Roadmap

We proactively seek inputs from our partners and customers and design our product roadmap based on these.



Customer Service

Our panel of product experts with vast industrial knowledge is quick to provide supportive solutions to any impromptu requests.



Community Driven

We believe in community growth along with business growth and hence engage in several employee training and engagement programs.

Thank You!

Email us at crm@inogic.com for a live demo.
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