

White Paper

TextSMS4Dynamics - Whitepaper

Aim:

TextSMS4Dynamics is an innovative solution dedicated to integrating messaging capabilities with Microsoft Dynamics 365 CRM. Serving as a seamless link between SMS communication and Dynamics 365, this tool empowers users to leverage messaging directly within the CRM environment. It expedites sending and receiving messages from the Dynamics 365 interface, streamlining communication processes for enhanced efficiency. Furthermore, TextSMS4Dynamics offers robust automation features, enabling users to create triggers and actions based on specific events, thereby automating message-related tasks. Furthermore, seamlessly archives historical message records, provides notifications for incoming messages, and facilitates the incorporation of images for enhanced visual appeal in message interactions. It bridges the gap, enabling businesses to capitalize on the immediacy and personal touch of messaging services within the CRM ecosystem. Instead of long format emails, increase customer reach with a short and crisp message.

Features:

- Send and receive Text messages directly within Dynamics 365, ditching the context switching.
- Stay informed: Get instant notifications and updates of incoming messages right in your CRM.
- Maintain a complete picture: Keep a historical record of conversations, accessible within Dynamics 365.
- Leverage messages triggers and actions to send automated messages, based on your CRM data.
- Turn SMS conversations into new leads, contacts, accounts, or even custom entities.

- Personalize interactions: Customize message templates to match your brand voice and needs.
- Access a user-friendly interface directly within CRM records, streamlining communication.
- Improve customer service and relationships through seamless two-way messaging.
- Easily transfer chat sessions between users or teams in Dynamics 365 CRM for seamless customer interactions.
- Configure a global Message Template once and use it across all record types for consistent messaging.

Supported Versions

Versions: Microsoft Dynamics 365 and Dataverse.

Deployment Models: Online.

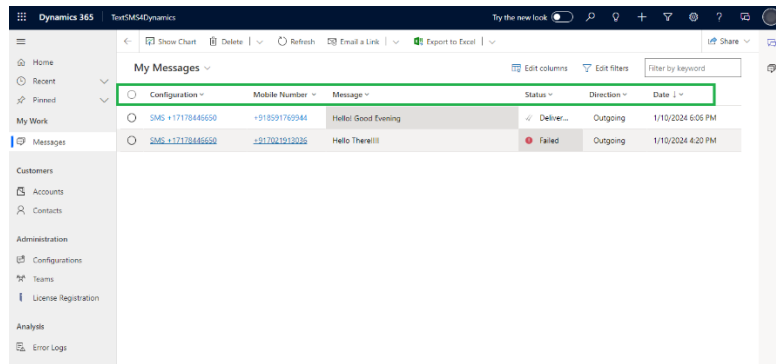
Who needs it?

TextSMS4Dynamics is pivotal for businesses using Microsoft Dynamics 365 CRM and messaging communication, enabling direct and personalized customer engagement. It automates messages and notifications, for efficient communication channels for customer-centric enterprises. Moreover, marketing and sales teams leverage its capabilities within Dynamics 365 CRM for targeted campaigns, quick user open rate aspects, and personalized promotions, amplifying campaign impact while nurturing customer relationships. It's a multifaceted tool streamlining operations, enhancing engagement, and revolutionizing strategies for impactful results, all within Dynamic 365 CRM.

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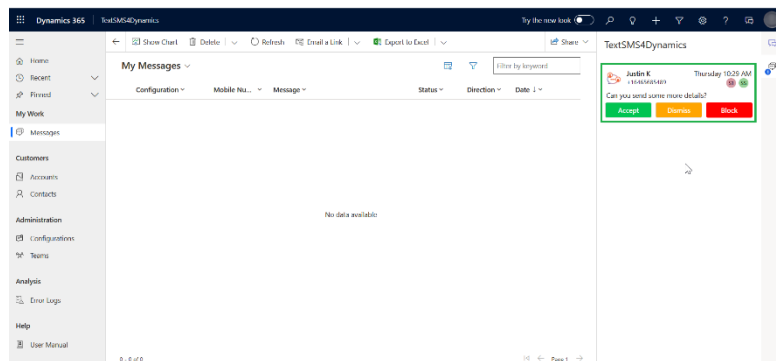
Simplify Message Management with TextSMS4Dynamics

All-in-one integrated application that optimizes conversations for enhanced sales, marketing, and promotions, increasing efficiency and impact.



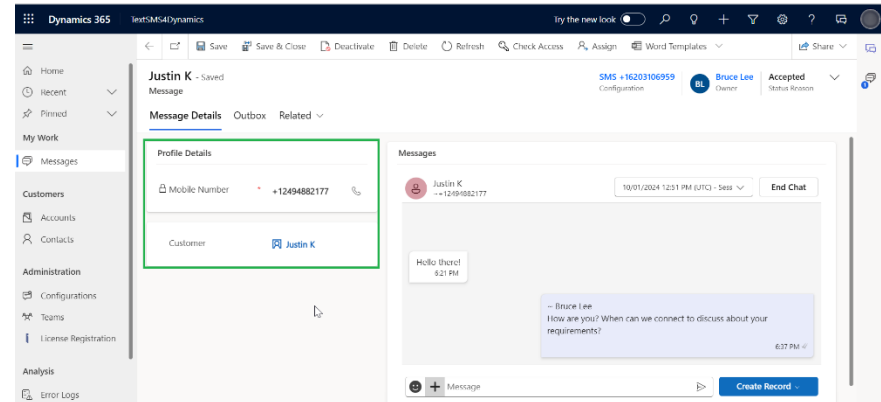
Message Notifications

Receive real-time notifications for each incoming message directly within the CRM platform. Notifications are displayed in a message bubble on the right-hand side, indicating the total count of unread messages.



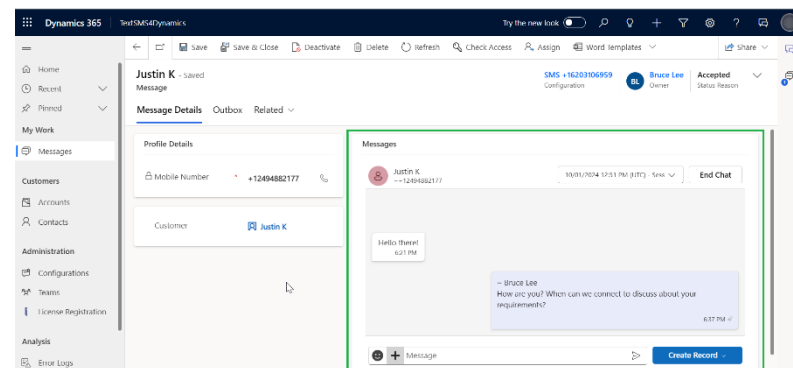
Mapping CRM Records

Map new messages, so that you can enjoy more informed and context-rich conversations as well as deliver personalized support.



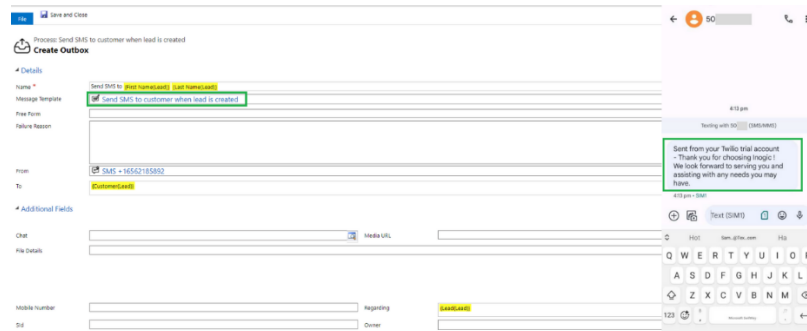
Effortless Messaging User Interface

Enables a streamlined Message UI integrated with CRM, allowing direct customer communication without platform switching.



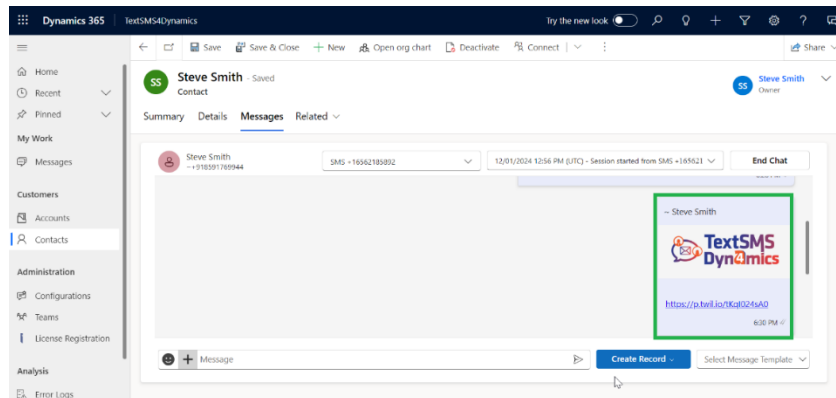
SMS Automation Simplified with TextSMS4Dynamics

Effortlessly configure message automation via TextSMS4Dynamics for triggering events like order confirmations or appointment reminders.



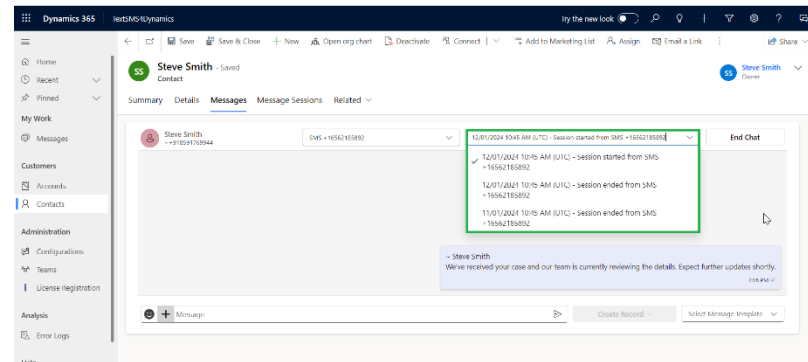
Picture Support: Make Conversations More Interesting

In CRM, directly send images to customers. Pairing images with text SMS enrich client interaction for better engagement.



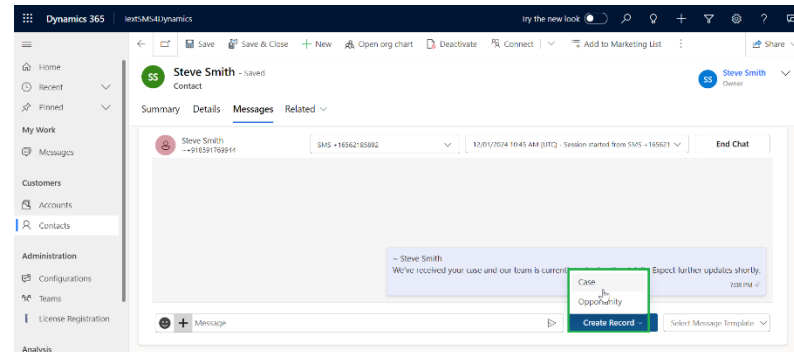
Store SMS historical records in Message Sessions

Store message records in CRM daily. Keep conversations as message sessions linked to each record in Dynamics 365 CRM. Easily track and access communication history within CRM.



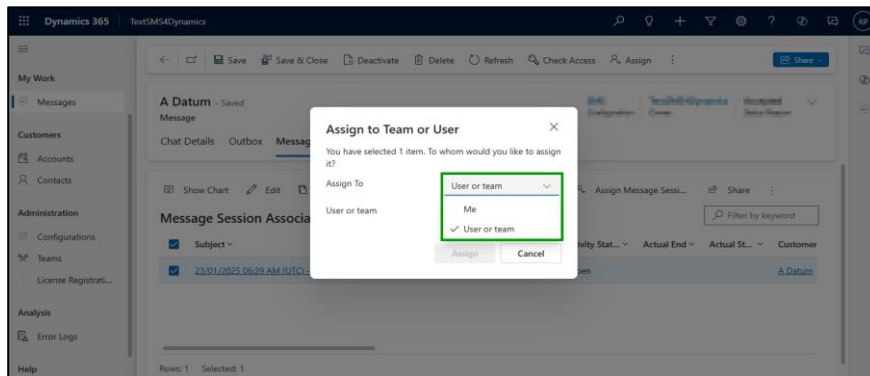
Create CRM Records from WhatsApp Messages

Capture customer interactions and convert them into actionable CRM data. Create CRM records from conversations, whether in an Out-of-the-Box (OOB) entity or a Custom Entity.



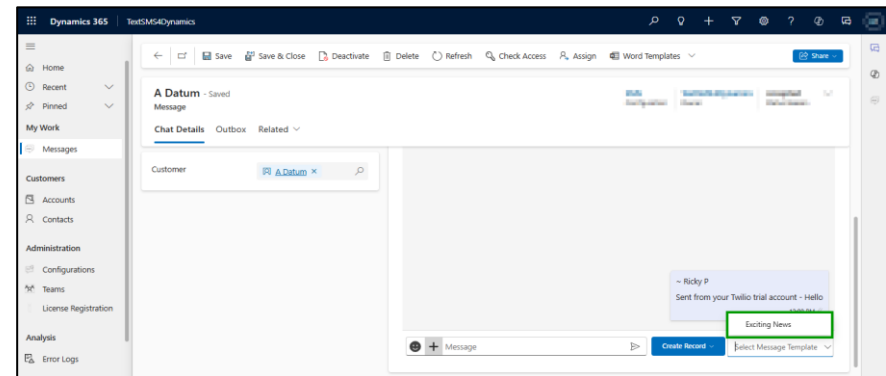
Reassign Chat

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.



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