

inogic



Your Bridge to Seamless CRM Messaging

inogic

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Need for WhatsApp Integration within Dynamics 365 CRM



175 million

people message on WhatsApp Business accounts, every day!



64%

customers prefer quick chat options like WhatsApp, when interacting with businesses.



98%

open rate for WhatsApp messages, over normal text.

**Increased
ROI**

**Time
Saving**



**Enhanced Customer
Experience**

**Prompt
Communication**

Key Features

Be Within CRM Ecosystem

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



CRM WhatsApp Notification

Enable WhatsApp 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 WhatsApp messages within CRM, while monitoring message statuses on a unified dashboard.



Store WhatsApp Chat History

Maintain WhatsApp chat histories associated to each Record within Dynamics 365 CRM and easily track communication.



Automate Communication

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



Create New-Record On New-Message

Create CRM record on receiving a new WhatsApp message from within the Chat UI, enabling easy creation of any OOB or custom entities.



Available for

Supported Versions

Dynamics 365 v9.1 and above

Microsoft Dataverse

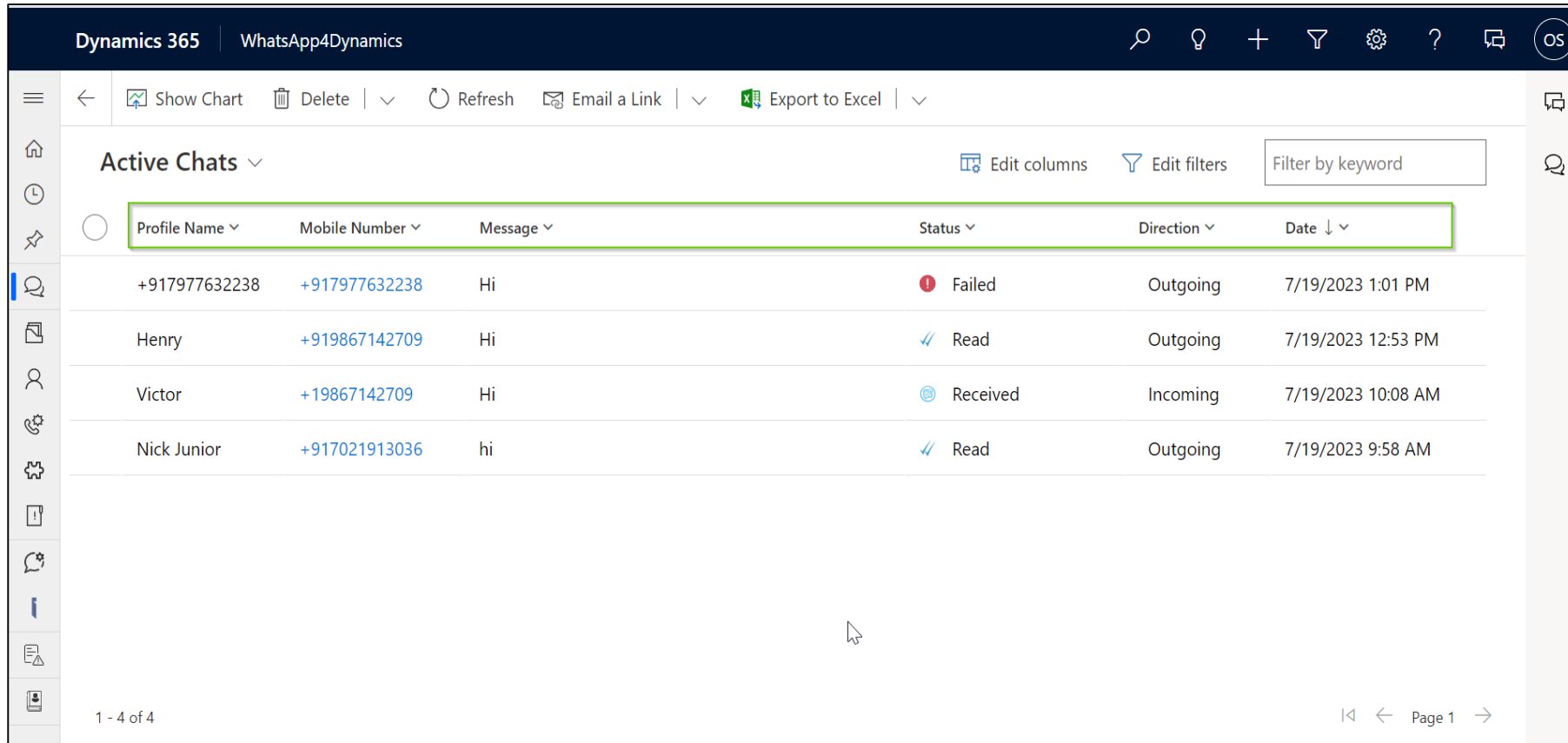


DYNAMICS 365 ONLINE

Deployments

WhatsApp Conversation Manager in CRM

With WhatsApp4Dynamics, integrate WhatsApp Business Account with CRM and enjoy the same experience of WhatsApp in Dynamics 365 CRM.



The screenshot displays the Dynamics 365 WhatsApp4Dynamics interface. At the top, the header shows 'Dynamics 365' and 'WhatsApp4Dynamics'. Below the header, there is a toolbar with icons for 'Show Chart', 'Delete', 'Refresh', 'Email a Link', and 'Export to Excel'. The main section is titled 'Active Chats' and includes a search bar 'Filter by keyword', 'Edit columns', and 'Edit filters' options. A table lists four active chats with columns for Profile Name, Mobile Number, Message, Status, Direction, and Date. The first chat is highlighted with a green border.

Profile Name	Mobile Number	Message	Status	Direction	Date
+917977632238	+917977632238	Hi	Failed	Outgoing	7/19/2023 1:01 PM
Henry	+919867142709	Hi	Read	Outgoing	7/19/2023 12:53 PM
Victor	+19867142709	Hi	Received	Incoming	7/19/2023 10:08 AM
Nick Junior	+917021913036	hi	Read	Outgoing	7/19/2023 9:58 AM

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Chat Notifications

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

The screenshot displays the Dynamics 365 WhatsApp4Dynamics interface. On the left is a navigation pane with sections: Home, Recent, Pinned, My Work (with 'Chats' selected), Customers (Accounts, Contacts), Administration (Configurations, License Registration), Analysis (Error Logs), and Help (User Manual). The main area shows a table of 'Active Chats' with columns for Profile Name, Mobile Number, Message, Status, Direction, and Date. Below the table, it indicates '1 - 7 of 7' items. On the right, a sidebar titled 'WhatsApp4Dynamics' shows a list of chat notifications, each with a contact name, a timestamp, and a bubble icon indicating unread messages. The notifications are for: +15803862730 (Ebony L. Jackson) with an audio message; +18565826670 (Anna D. Linkous) with an integration planning document; Roy Harper (Douglas M. Fitzwater) with a photo; +919325852880 (UJ GROUPS) with an Olivia High Depth Elevation-2.pdf document; and +917021913036 (Derek) with a message about Gamiflcs365 pricing. Each notification has 'Accept' and 'Decline' buttons. A 'View Chat' button is also present for the photo message.

Profile Name	Mobile Number	Message	Status	Direction	Date
Ebony L. Jack...	+15803862730	Audio	Received	Incoming	7/27/2023 5:17 PM
Anna D. Linko...	+18565826670	Integration Planning Document	Received	Incoming	7/27/2023 5:08 PM
Johny	+917738756149	Your Attach2dynamics product saved my life!!	Received	Incoming	7/27/2023 5:07 PM
Douglas M. Fi...	+19703060706	Photo	Received	Incoming	7/27/2023 5:06 PM
UJ GROUPS	+919325852880	OLIVIA HIGH DEPTH ELEVATION-2.pdf	Received	Incoming	7/27/2023 5:04 PM
Derek 🧑	+917021913036	Hi, wanted to know pricing of Gamiflcs365	Received	Incoming	7/27/2023 5:00 PM
SwApZzAaRo...	+919167556765	Hello inogic 🙌	Received	Incoming	7/27/2023 4:16 PM

Accept/Decline/ View Chats

Users have the choice to Accept/ Decline a Chat from unknown contacts and View Chats from known contacts.

The screenshot displays the WhatsApp4Dynamics interface within the Dynamics 365 environment. It is divided into two main panels. The left panel, titled 'Active Chats', shows a list of incoming messages. The right panel, titled 'WhatsApp4Dynamics', shows the details of a selected chat, including the contact's name, phone number, and the message content. Below the message, there are 'Accept' and 'Decline' buttons. A third panel, titled 'My Active Contacts', shows a list of contacts with their names, email addresses, and company names. A 'View Chat' button is visible next to the contact details in this panel. The interface includes a navigation bar at the top with various icons and a sidebar on the left with a menu. The bottom of the interface shows pagination information.

Profile Name	Mobile Number	Message	Status	Direction
Susan	+919324073...	Hello	Received	Incomi...
Samantha	+919167556...	Hello	Received	Incomi...

Full Name	Email	Company Name
Abraham McCormick	abraham_mccorm...	Fabrikam Robotics
Adrienne McMillan	adrienne_mcmilla...	
Alexis Fry		Trey Research Inst...
Allison Dickson	allison_dickson@f...	
Amie Gonzales		Southridge Video...
Amos Conger		Adventure Works
Andrew Book		Trey Research Ass...

Mapping CRM Records

Map new WhatsApp chats on the basis of their mobile number, so that you can enjoy more informed and context-rich conversations as well as deliver personalized support.

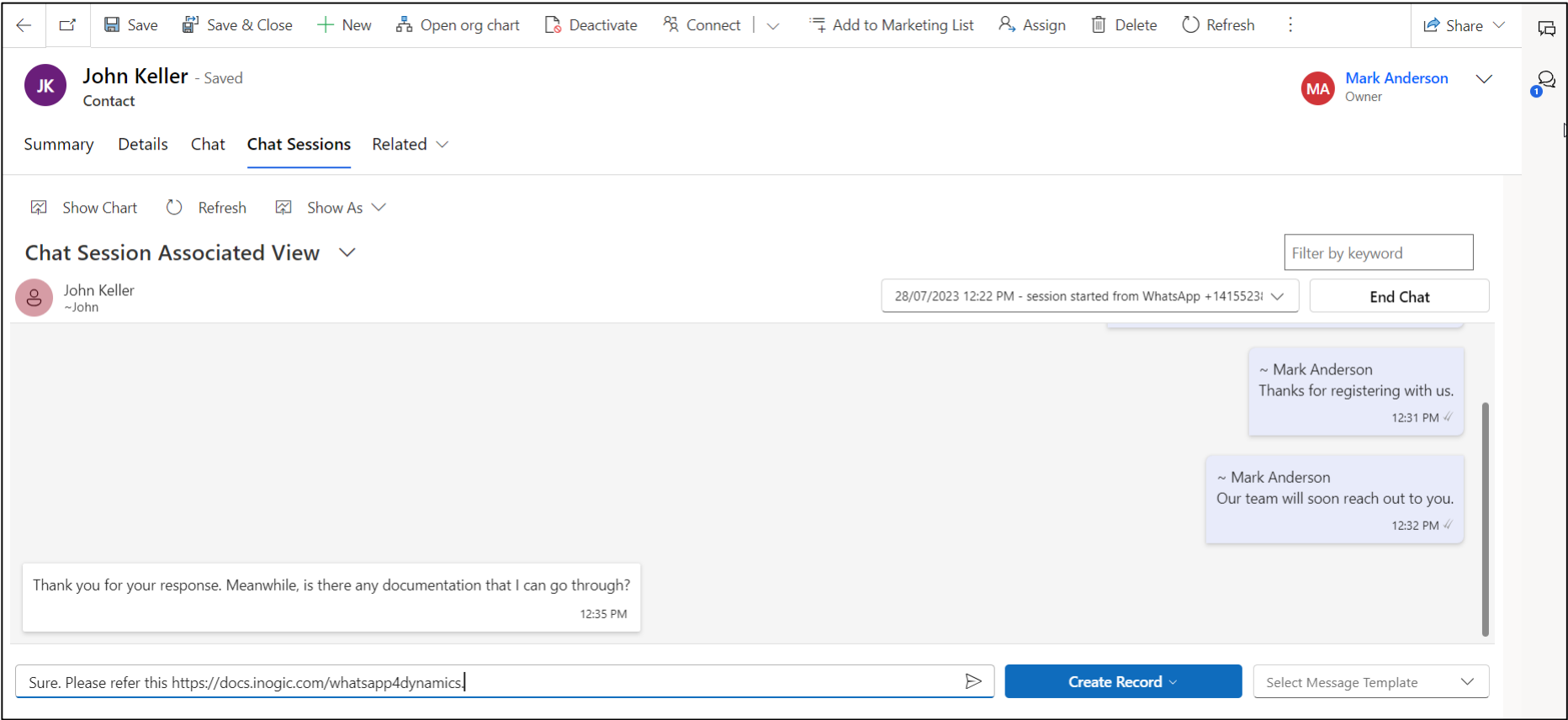
The screenshot displays the Inogic CRM interface for a WhatsApp chat session. The top navigation bar includes icons for back, list, and search, along with buttons for Save, Save & Close, Deactivate, Delete, Refresh, Check Access, Assign, Word Templates, and Share. The main header shows the contact name "John Keller - Saved" and the chat status "WhatsApp +14155238886 Accepted". The "Status Reason" is "Configuration", and the "Owner" is "Mark Anderson".

The left sidebar contains a "Profile Details" section with a green border around the "Profile Name" and "Mobile Number" fields. The "Profile Name" is "John" and the "Mobile Number" is "+12025550138". Below this is a "Customer" section with a "Customer" field and a "John Keller" button.

The main chat area is titled "WhatsApp Chat" and shows a conversation with "John Keller ~John". The chat history includes a message from Mark Anderson: "Our team will soon reach out to you." and a response from John Keller: "Thank you for your response. Meanwhile, is there any documentation that I can go through?". The chat session has ended, and a message states: "The chat session has over. Please send the message using the Message Template to start the chat again."

Communicate directly from CRM Records

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



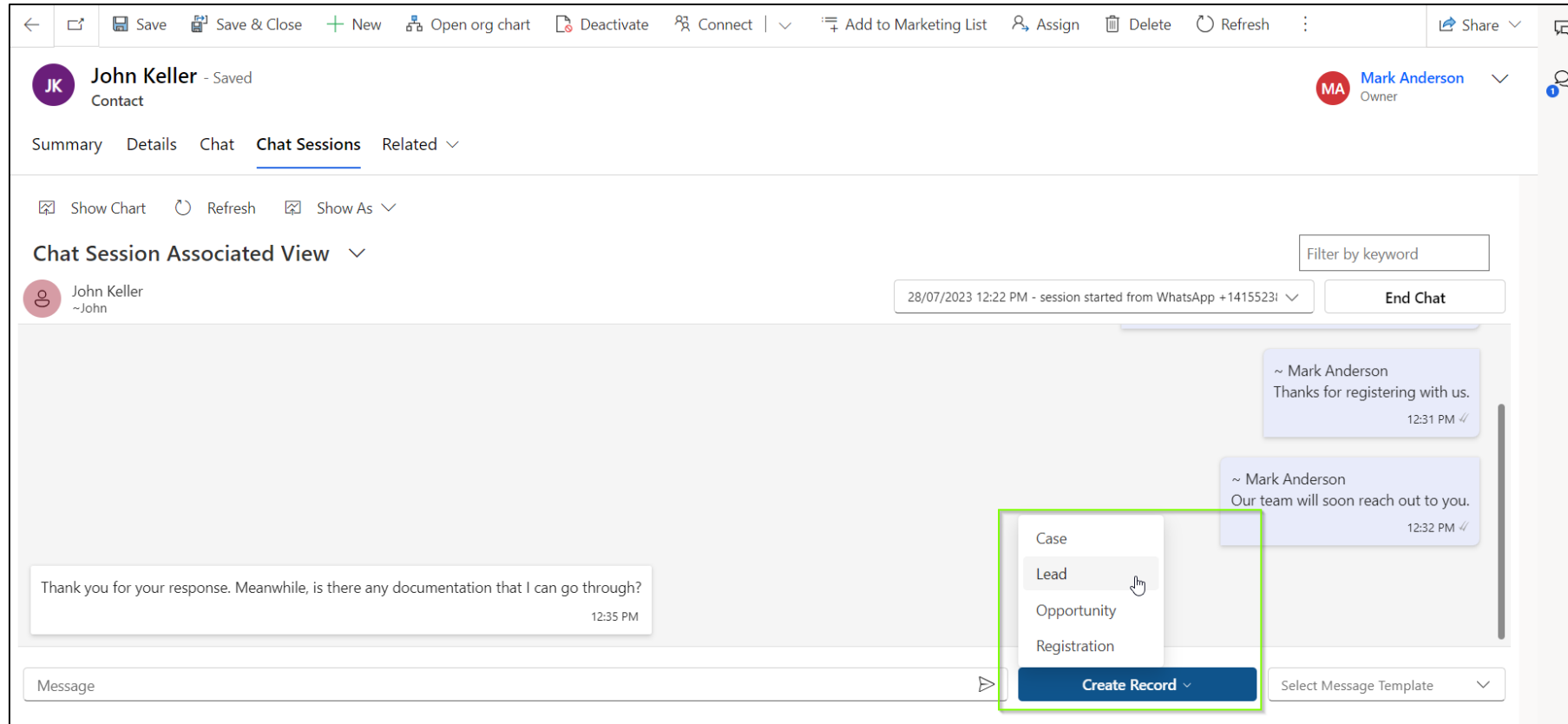
Supports Multiple Languages & File Formats In Chat UI

You can interact with customers using your WhatsApp Business Account in your preferred language and receive different types of files seamlessly within the CRM environment.

The screenshot displays the Inogic CRM interface for a WhatsApp chat session. The top navigation bar includes icons for Save, Save & Close, Deactivate, Delete, Refresh, Check Access, Assign, Word Templates, and Share. The main header shows the contact name 'John Keller - Saved', the WhatsApp number '+14155238886', and the user 'Sam J' (Owner). Below the header, there are tabs for 'Chat Details', 'Chat Session', 'Outbox', and 'Related'. The left sidebar contains sections for 'Profile Details' (Name: John Keller, Profile Name: The Sarcastic Bastard, Mobile Number: +12025550138), 'Customer' (John Keller), and 'Last message Details'. The main chat area, titled 'WhatsApp Chat', shows a conversation with John Keller. A message from the customer is highlighted with a green box: 'Bonjour' (3:18 PM) followed by 'Je passais en revue votre liste de produits et je suis très intéressé par quelques-uns d'entre eux.' (3:20 PM). The chat interface includes an 'End Chat' button and a 'Create Record' button at the bottom.

Create CRM Records from WhatsApp Chats

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



Store Chat History In Chat Sessions

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

The screenshot shows the Dynamics 365 CRM interface for a contact named John Keller. The 'Chat Sessions' tab is selected, displaying a list of chat sessions. The sessions are listed with dates and times, and a 'Create Record' button is visible at the bottom.

Chat Session Associated View

- 28/07/2023 12:22 PM - session started from WhatsApp +14155238886
- 27/07/2023 12:18 PM - Session ended from WhatsApp +14155238886
- 26/07/2023 12:03 PM - Session ended from WhatsApp +14155238886
- 25/07/2023 10:09 AM - Session ended from WhatsApp +14155238886
- 24/07/2023 10:35 PM - Session ended from WhatsApp +14155238886
- 23/07/2023 10:13 PM - Session ended from WhatsApp +14155238886

Thank you for your response. Meanwhile, is there any documentation that I can go through?
12:35 PM

Sure. Please refer this <https://docs.inogic.com/whatsapp4dynamics>.

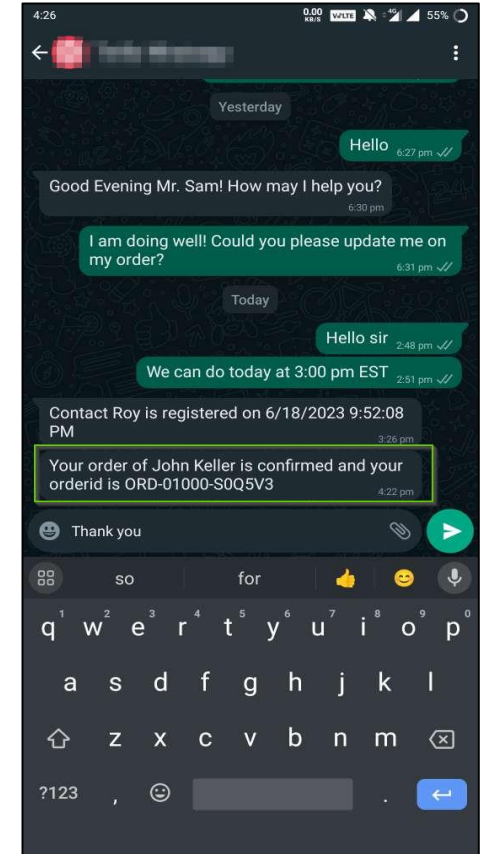
Create Record

Trigger & Send Automate WhatsApp Messages

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

The screenshot displays the Microsoft Dynamics 365 Power Apps interface. The main window shows the configuration for a process named "send message to customer when order is received". The process is set to run in the background (recommended) and is activated as a process. The entity is "Order" and the category is "Workflow". The process is configured to run when a record is created, assigned, or deleted. The process is currently in the "Activated" state.

The "Create Outbox" dialog is open, showing the configuration for the "send message to customer when order is received" process. The "General" tab is selected, and the "Name" field is set to "Send message to (Customer(Order))". The "Message Template" field is set to "send message to customer when order is received". The "Additional Fields" tab is also visible, showing fields for "Chat", "Mobile Number", "SId", and "Owner".



What's next

Get Started

In just 10 minutes!

Learn more about [WhatsApp4Dynamics](#)

Get your WhatsApp4Dynamics 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.
www.inogic.com



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