



White Paper

WhatsApp4Dynamics - Whitepaper

Aim:

WhatsApp4Dynamics is a solution that integrates the popular messaging application WhatsApp with Microsoft Dynamics 365 CRM platform. It serves as a bridge between WhatsApp Business Account and Dynamics 365, enabling users to utilize WhatsApp's messaging capabilities within the Dynamics 365 environment. It provides features such as sending and receiving messages directly from within the Dynamics 365 interface and streamlines the communication processes. Moreover, it offers automation capabilities, allowing users to set up triggers and actions based on specific events! It also integrates CRM data with WhatsApp Business Account, providing users with access to customer information and context-rich conversations. Ultimately, it leverages the power of WhatsApp within their CRM workflows.

Features:

- Enables sending and receiving WhatsApp messages directly from within Microsoft Dynamics.
- Provides prompt notifications and updates from WhatsApp Business Account on CRM, keeping users informed.
- Maintains a history of WhatsApp conversations within Microsoft Dynamics 365 CRM, providing communication records.
- Integrate WhatsApp Business Account within Microsoft Dynamics 365 CRM to send automated messages based on CRM actions.
- Leverage WhatsApp4Dynamics for customer engagement, such as sending notifications, updates, or marketing messages from Microsoft Dynamics 365 CRM.
- You can create leads, contact, account, any other OOB or custom entity from WhatsApp conversations.
- Customize the message templates approved by Twilio as per your need, including Dynamic fields of the CRM.

- Access WhatsApp chat interface from within the CRM records to have a seamless and integrated approach to customer communication, which can lead to improved customer service and relationship management.

Supported Versions

Versions: Microsoft Dynamics 365 v9.1 and above, Dataverse.

Deployment Models: Online.

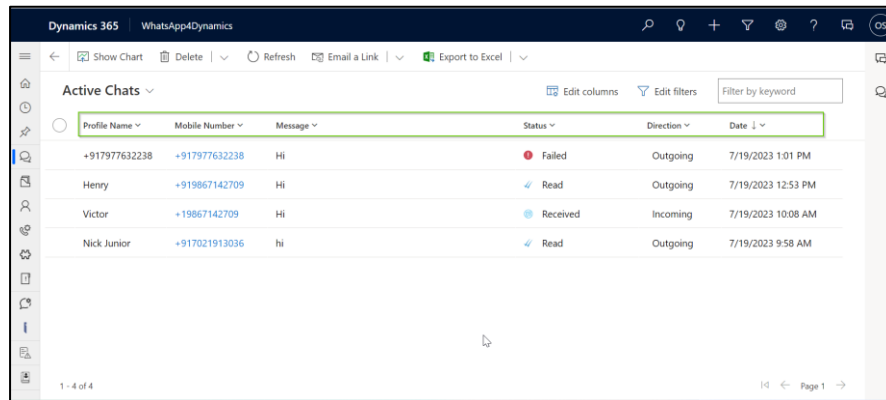
Who needs it?

WhatsApp4Dynamics is beneficial for businesses using Microsoft Dynamics 365 CRM and WhatsApp Business Account for communication and customer engagement. Sales teams can communicate directly with leads, customers and engage them with targeted messages, while customer support teams can provide quick assistance and streamline workflows. The automation feature helps with personalized messaging and prompt notifications. For customer-centric businesses, WhatsApp4Dynamics offers a convenient and personalized communication channel. It is particularly useful for enterprises who would like to leverage WhatsApp's capabilities within Dynamics 365.

WhatsApp Conversation Manager in CRM

With WhatsApp4Dynamics integration enjoy the same experience of WhatsApp in Dynamics 365 CRM, communicate directly within the CRM environment and eliminate the need to switch between different platforms.

WhatsApp4Dynamics - Whitepaper

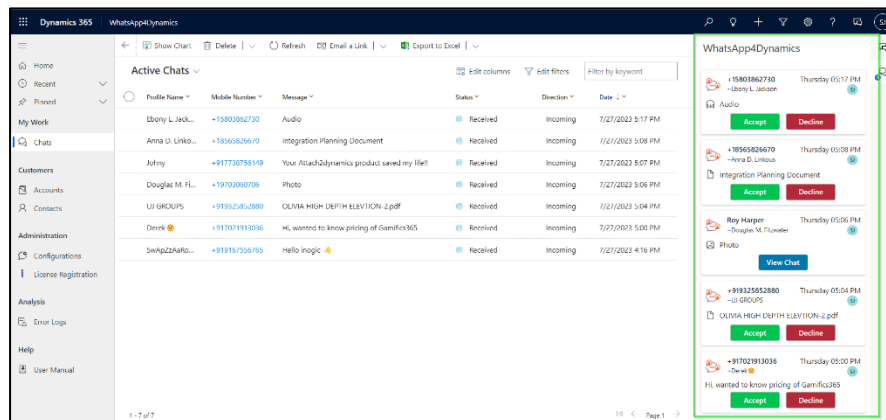


The screenshot shows the Dynamics 365 WhatsApp4Dynamics interface. At the top, there's a navigation bar with 'Dynamics 365' and 'WhatsApp4Dynamics'. Below it, a toolbar contains icons for 'Show Chart', 'Delete', 'Refresh', 'Email a Link', and 'Export to Excel'. A search bar is labeled 'Filter by keyword'. The main area displays a table of 'Active Chats' with columns: Profile Name, Mobile Number, Message, Status, Direction, and Date. The table lists four chats: one with a failed outgoing message, and three with read outgoing messages.

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

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.

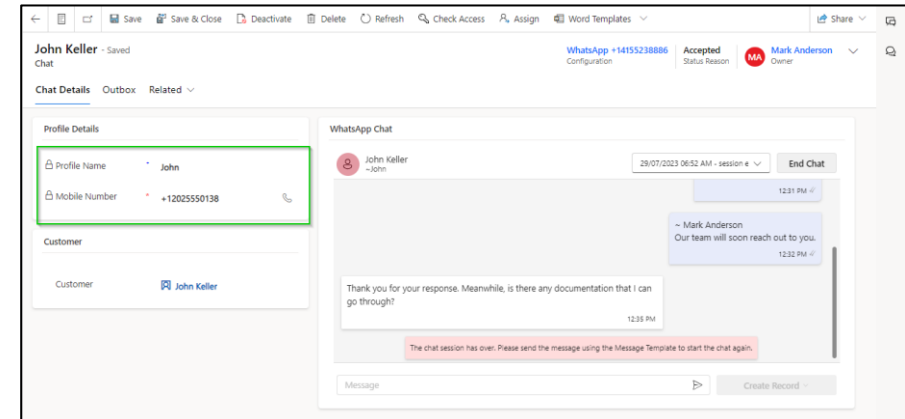


The screenshot shows the Dynamics 365 WhatsApp4Dynamics interface with a sidebar on the left. The sidebar includes sections for 'Home', 'Recent', 'My Work', 'Customers' (with sub-items: Accounts, Contacts), 'Administration' (with sub-items: Configurations, License Registration), 'Analysis' (with sub-item: Error Logs), and 'Help' (with sub-item: User Manual). The main area displays a table of 'Active Chats' with columns: Profile Name, Mobile Number, Message, Status, Direction, and Date. The table lists seven chats, including audio, documents, and photos.

Profile Name	Mobile Number	Message	Status	Direction	Date
Ebony L. Jack...	+15802692730	Audio	Received	Incoming	7/27/2023 5:17 PM
Anna D. Linko...	+18563626670	Integration Planning Document	Received	Incoming	7/27/2023 5:08 PM
Johnny	+91773675619	Your Attach4Dynamics product saved my life!	Received	Incoming	7/27/2023 5:07 PM
Douglas M. Fl...	+19703000706	Photo	Received	Incoming	7/27/2023 5:06 PM
UI GROUPS	+919324852880	OLVIA HIGH DEPTH ELEVATION-2.pdf	Received	Incoming	7/27/2023 5:04 PM
Derek	+197021913036	Hi, wanted to know pricing of Gamific365	Received	Incoming	7/27/2023 5:00 PM
SwAp2AH0...	+919167330763	Hello inogic	Received	Incoming	7/27/2023 4:16 PM

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.

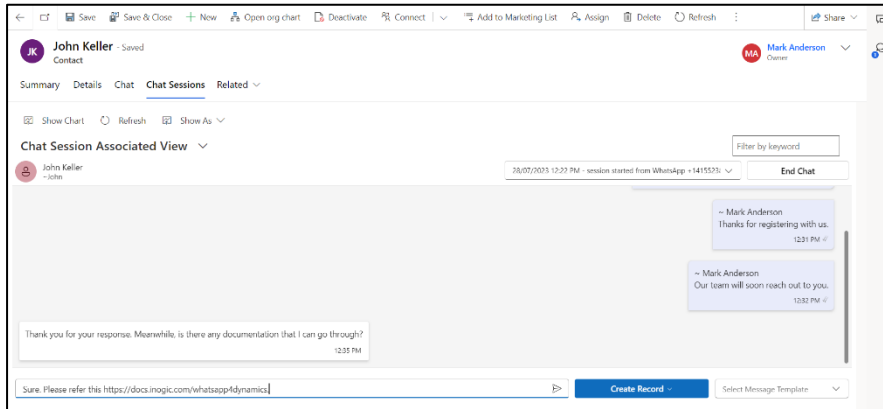


The screenshot shows the Dynamics 365 WhatsApp4Dynamics interface with a chat conversation. The chat is titled 'John Keller - Saved Chat'. The chat details show the profile name 'John' and mobile number '+12025550138'. The chat history shows a conversation where John Keller asks for documentation and Mark Anderson responds. The chat status is 'Accepted' and the owner is 'Mark Anderson'.

Communicate directly from CRM Records

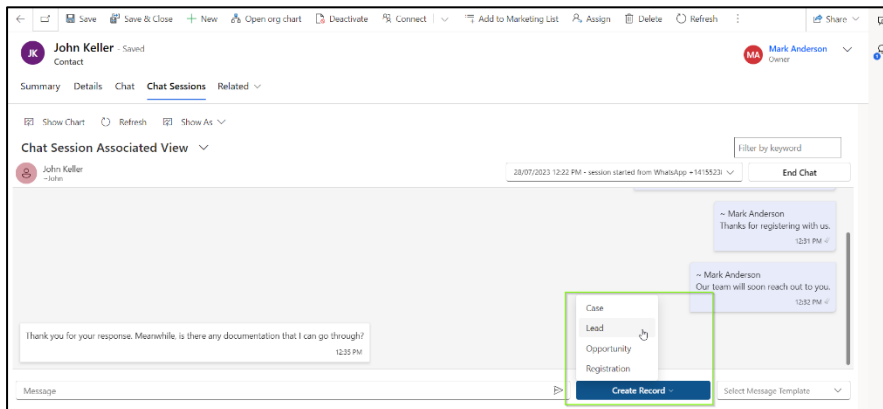
Communicate on WhatsApp directly from CRM Records. Interact with clients and provide a convenient and familiar channel for direct communication, making it easier to manage and maintain customer relationships within the CRM system.

WhatsApp4Dynamics - Whitepaper



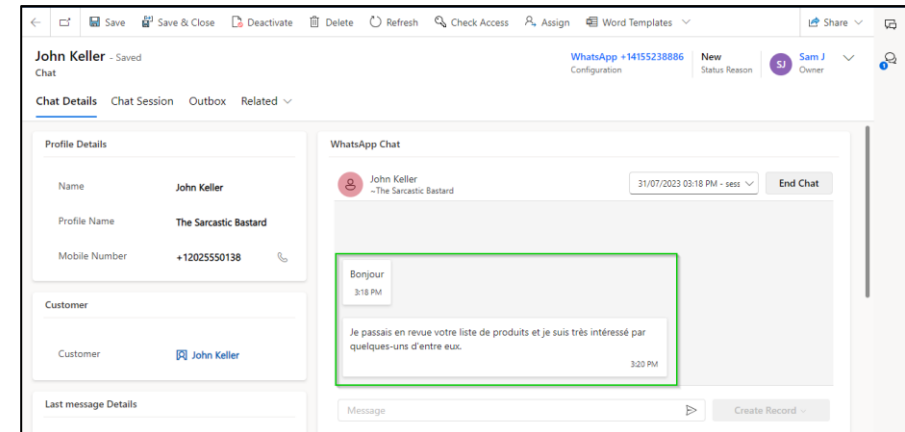
Create CRM Records from WhatsApp Messages

Capture customer interactions and convert them into actionable CRM data, making it easier for businesses to manage their customer relationships. Create CRM records from WhatsApp chats, whether in an Out-of-the-Box (OOB) entity or a Custom Entity.



Supports Multiple Languages & File Formats in Chat UI

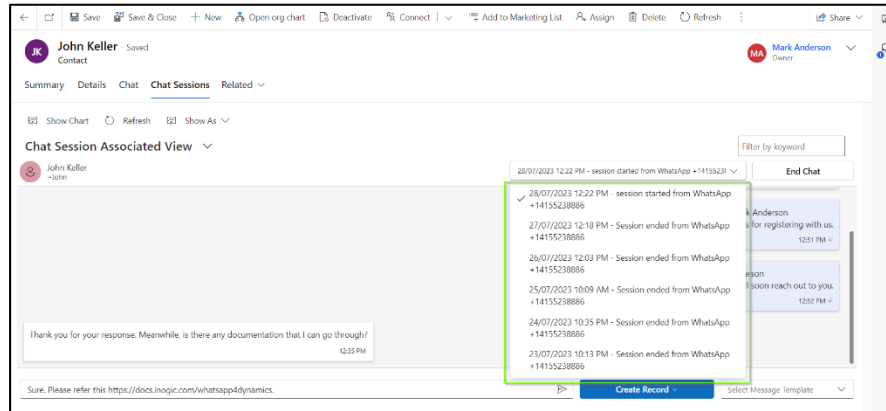
You can interact with customers using WhatsApp in your preferred language and receive different types of files seamlessly within the CRM environment.



Store Chat History in Chat Sessions

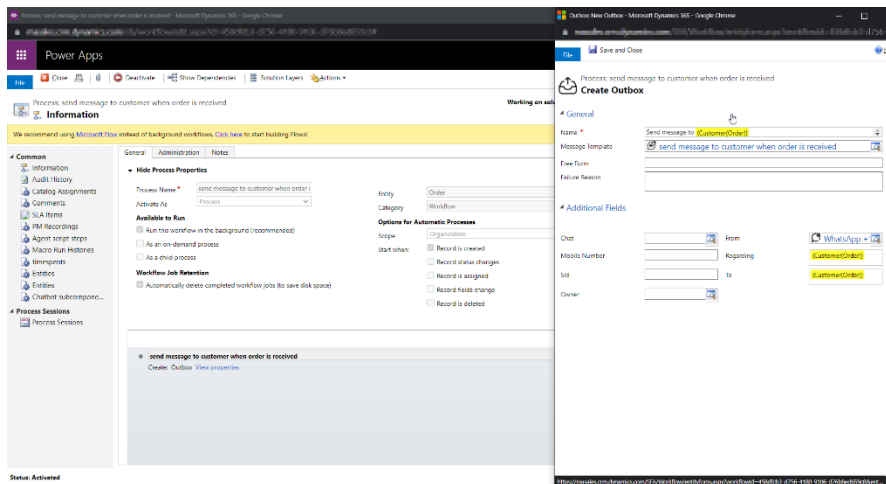
Communicate on WhatsApp from CRM and store the entire conversation history as a chat session. You can maintain these WhatsApp chat histories associated to each Record within Dynamics 365 CRM and easily track communication.

WhatsApp4Dynamics - Whitepaper

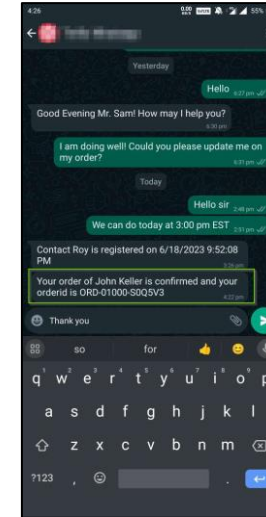


Trigger & Send Automate WhatsApp Messages

Automate sending messages through workflows within Dynamics 365 CRM. Set up triggers and actions based on specific events, such as sending automated WhatsApp messages for order confirmations or appointment reminders.



Once trigger is activated, the messages will be automatically sent on order confirmations, appointment reminders etc. as shown in the screenshot below.



Contact Us:

INOGIC (MUMBAI - INDIA)

M/S. INOGIC TECH (INDIA) PVT. LTD.
A/301, Everest Nivara InfoTech Park,
TTC Industrial Area, MIDC, Turbhe,
Navi Mumbai, Maharashtra – 400 705.
INDIA
E-mail: crm@inogic.com
Skype: [crm@inogic.com](https://www.skype.com/partners/inogic)
Twitter: @inogic