White Paper

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.
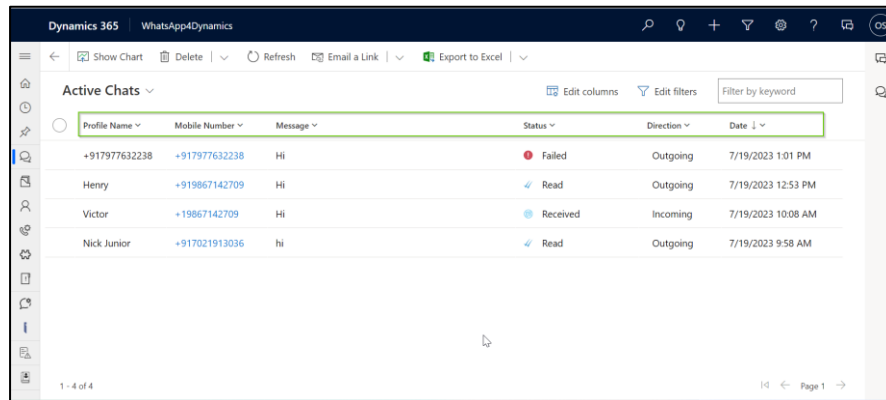**Deployment Models:** Online.

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.
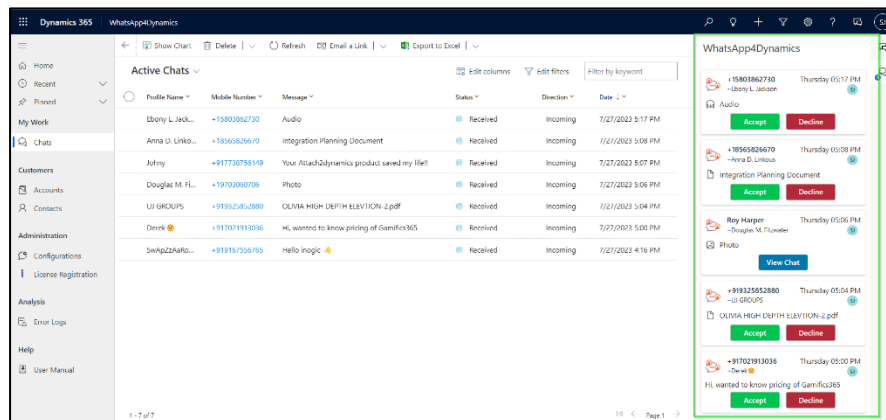
Mapping CRM Records

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.

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.
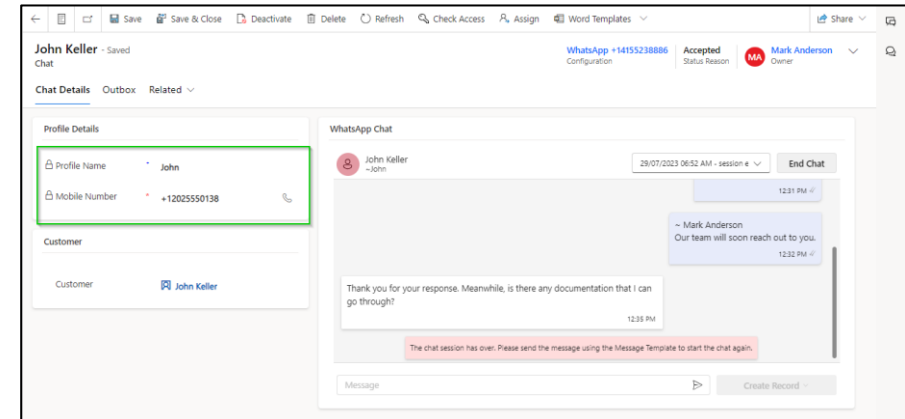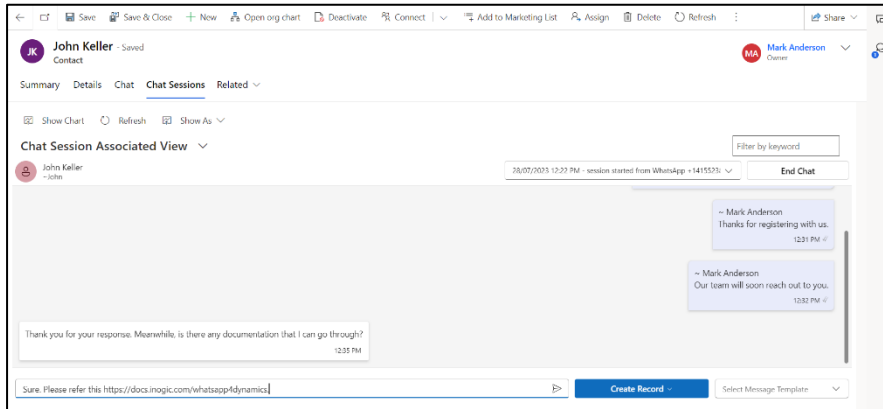
Communicate directly from CRM Records

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.

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.
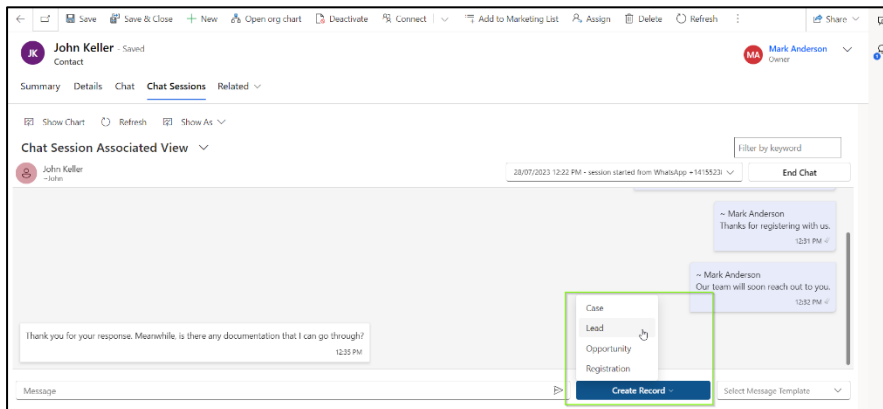
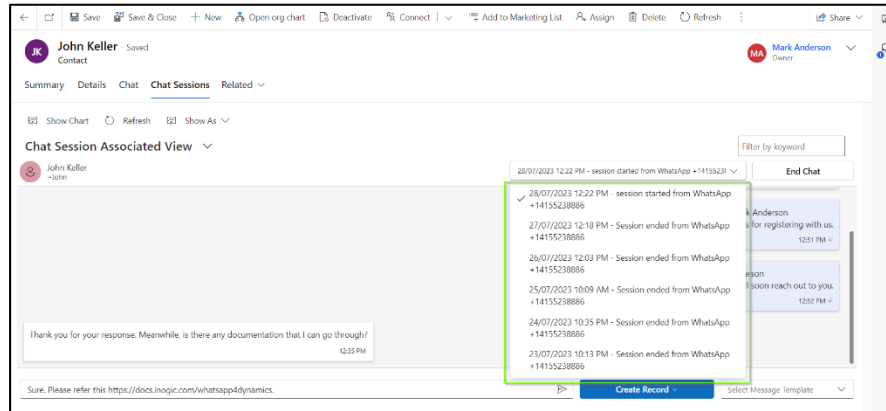## Supports Multiple Languages & File Formats in Chat UI

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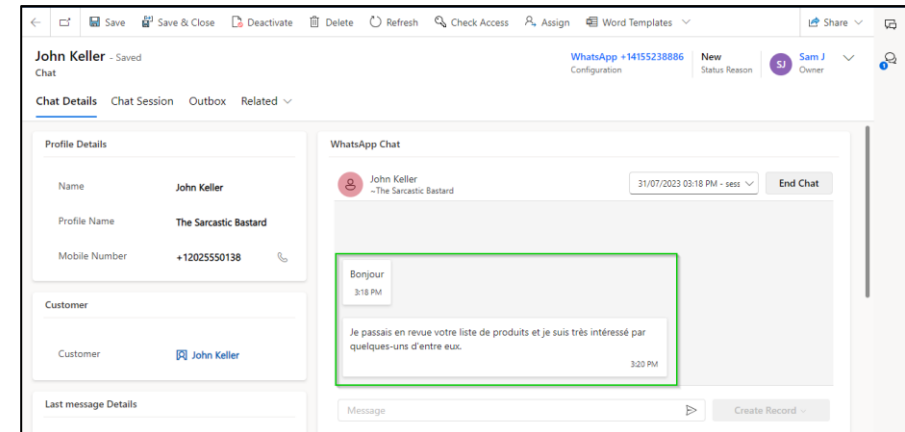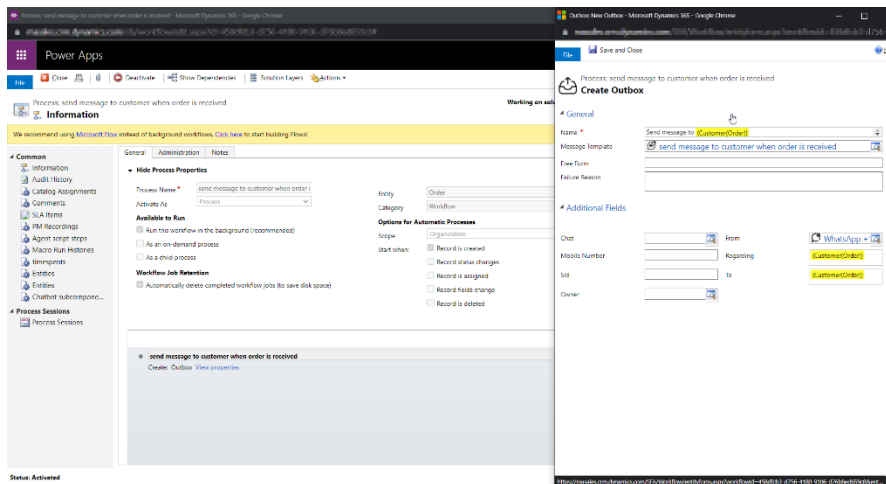

Store Chat History in Chat Sessions

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.

Once trigger is activated, the messages will be automatically sent on order confirmations, appointment reminders etc. as shown in the screenshot below.
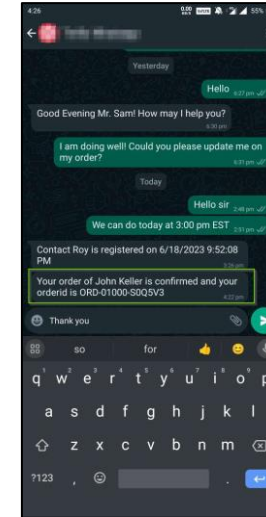
Trigger & Send Automate WhatsApp Messages

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.

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