



# **Dynamics Telephony Phone System**

CRM and Phone in one app

...built for Dynamics 365 users.

# Why Dynamics Telephony PHONE SYSTEM ?

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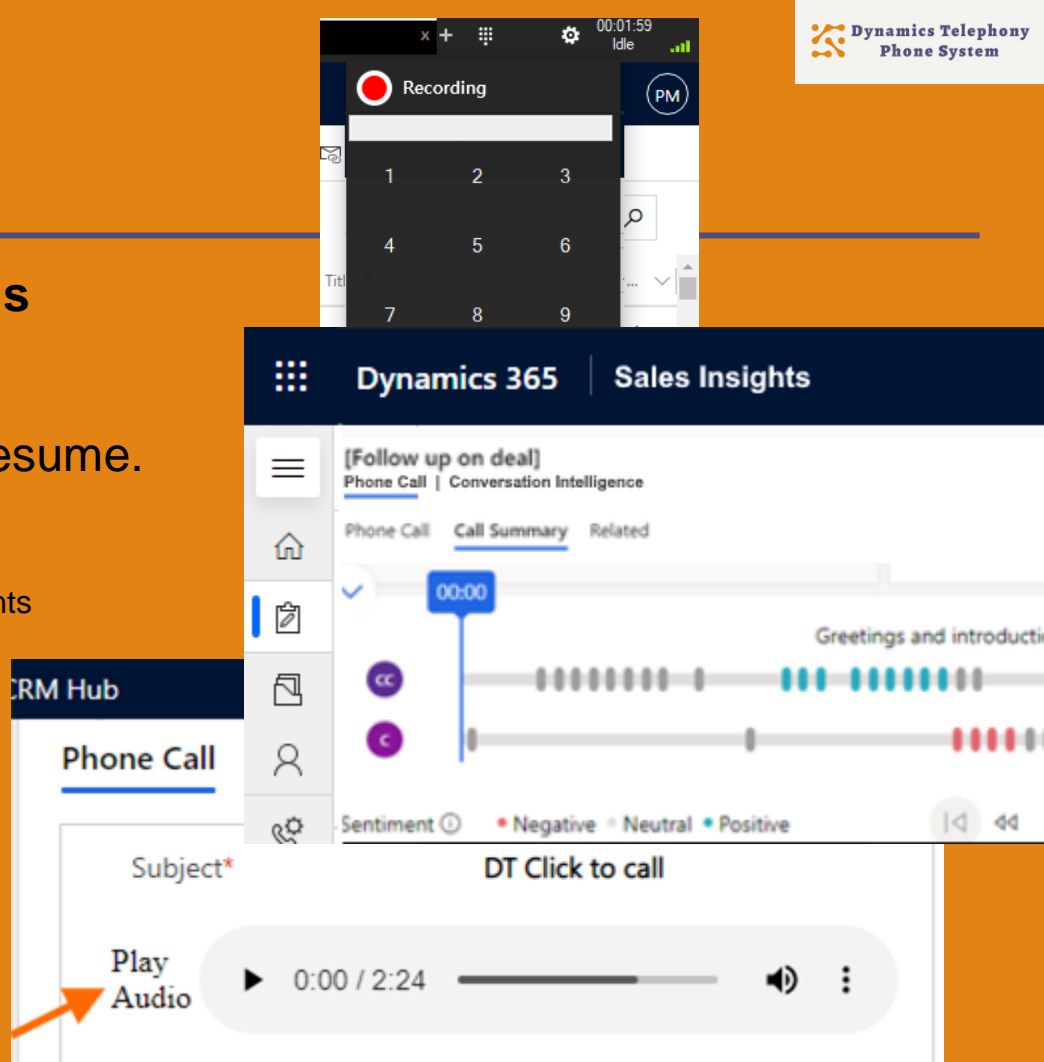
**Ultimate innovation and flexibility when CRM is part of the phone system, from one vendor**

- CRM data enables innovative phone call routing and reporting.
- Single vendor delivering CRM and PHONE SYSTEM
  - No integration required

# Call Recording

## Record inbound and outbound calls with flexible options

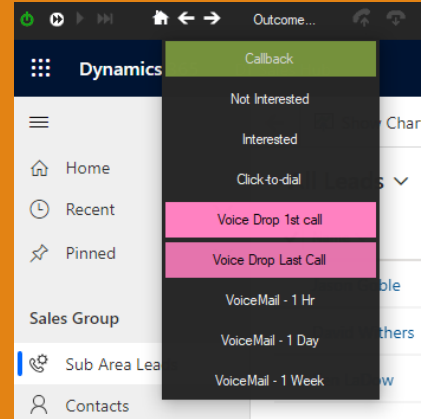
- Controls in DT Client: Pause / Resume.
- Options
  - Suppress recording warning announcements
  - Storage on your server for security or cost management.
  - Recording link in CRM phonecall record - no more searching for recordings
  - Transcript in CRM
  - Send recording to Dynamics 365 Sales Insights via Azure storage
  - - get transcript, recording link and analytics in CRM



# Voice Drop

## Save time and always leave a bright-sounding accurate message

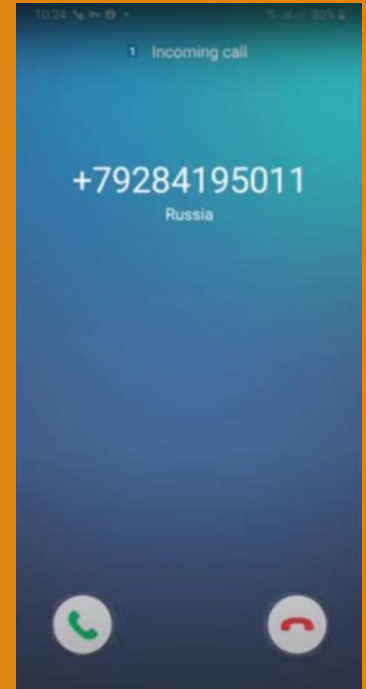
- Play pre-recorded message into customer's voicemail
  - Available on the Outcomes list
  - Can also schedule a retry
  - Definable per queue
  - Definable per agent if you have personal queues
  - Define as many as you need
  - Use your phone to record or listen to the message
- One-click:
  - Play the voice-drop message,
  - Log the call in CRM,
  - Save current CRM form,
  - Set up a callback for tomorrow - as a CRM phonecall with due date,
  - Hang up the call and present the next one.



# Flexible Calling Number

**Customers answer more if the call is from a **local** number.**

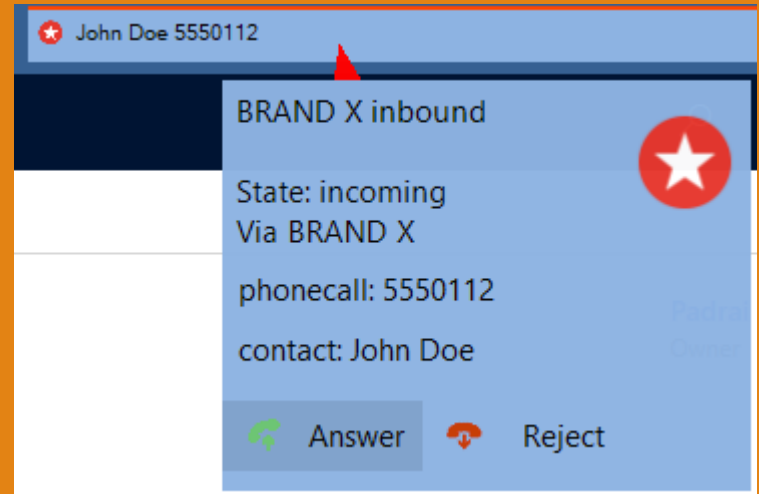
- Define a Calling Number per user (extension)
- Auto-select a calling number per call based on CRM field in the dialed record
  - E.g. campaign name, record owner, or area
  - You can also set a default that is used for all other calls
- Inbound calls to the number can be to a different phone system.
  - Keep your current inbound phone system during the transition.



# Multi-Brand Features

## When your users handle calls for multiple brands...

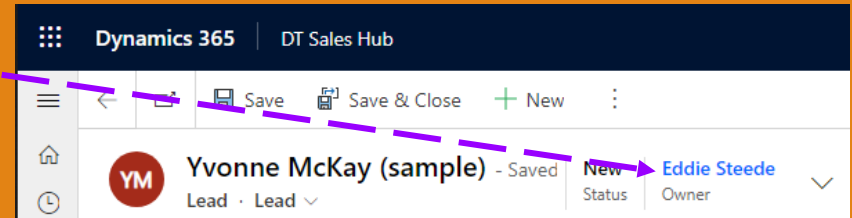
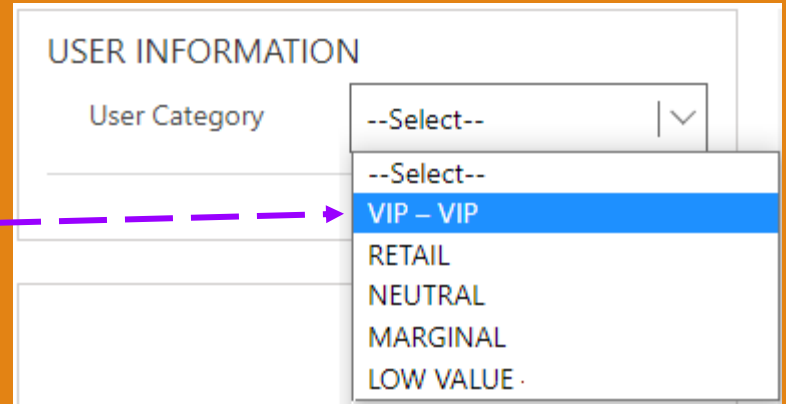
- Pop the brand name and icon with the incoming call
  - User always knows which brand to represent
- Only search for the caller in the correct brand
  - Maintain brand integrity
- Dial customers and display the correct number for the brand
  - In case the customer calls you back



# Route & Prioritise caller using CRM data

Before the caller joins the queue,  
CRM data helps **route** the call

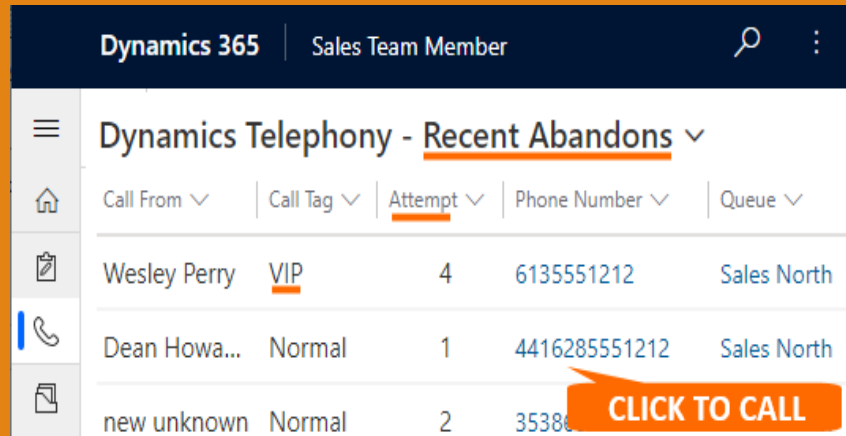
- Put the caller to the top of the queue if they are more valuable
- Put them to the back of the queue if they are low value
- Route callers straight to their CRM record owner






# Full call history in CRM

## From when the caller hears first announcement to the hangup

- Realtime view of callers in queue in CRM,  
With CRM data like name, company and value.
- Call transfer history in CRM
- Abandons in CRM
  - Click on them to call them back !
  - See next slide...



Dynamics 365   Sales Team Member					
Dynamics Telephony - <u>Recent Abandons</u> ▾					
	Call From ▾	Call Tag ▾	<u>Attempt</u> ▾	Phone Number ▾	Queue ▾
	Wesley Perry	<u>VIP</u>	4	6135551212	Sales North
	Dean Howa...	Normal	1	4416285551212	Sales North
	new unknown	Normal	2	3538	<b>CLICK TO CALL</b>

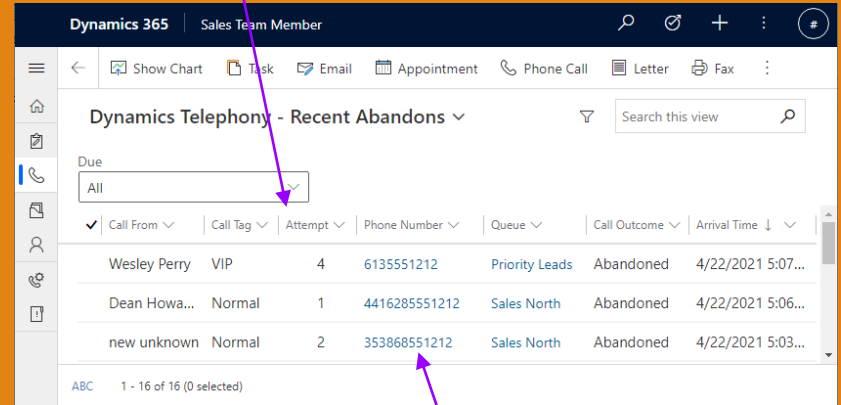


# Don't abandon the abandons!

## PHONE SYSTEM makes inbound call-abandon management easy.

- Abandons are lost sales, or a service black mark.
- Measure your abandon return rate
  - 5-8% are abandoning, but how many call back?
- CRM Tools to help you call back the most valuable abandons.

Order by value, attempts and wait-time



Call From	Call Tag	Attempt	Phone Number	Queue	Call Outcome	Arrival Time
Wesley Perry	VIP	4	6135551212	Priority Leads	Abandoned	4/22/2021 5:07...
Dean Howa...	Normal	1	4416285551212	Sales North	Abandoned	4/22/2021 5:06...
new unknown	Normal	2	353868551212	Sales North	Abandoned	4/22/2021 5:03...

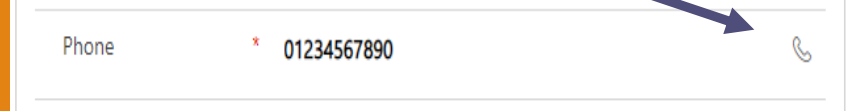
Click To call them back

# Click to dial in any browser

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## PHONE SYSTEM makes inbound call-abandon management easy.

- Click phone number icon beside any phone number to dial it
  - Calls your extension then bridges in your customer.
- Any browser.
  - Uses CIF (Channel Integration Framework)
  - For users not using DT Client



# Queues membership and status

**PHONE SYSTEM** makes queue management easy.

- Click on the queue to join / leave
- Per queue realtime status numbers.

The screenshot shows the Dynamics Telephony interface with a list of queue statuses. The 'Liberty' queue is selected and highlighted in green. The status for 'Liberty' is 'AGTs: 1 CWI (s) 1 (144)'. Annotations with arrows point to specific parts of the interface:

- An arrow points to the 'Liberty' queue name, labeled "Your status".
- An arrow points to the 'AGTs: 1' part of the status, labeled "Agents staffed".
- An arrow points to the 'CWI (s) 1 (144)' part of the status, labeled "Calls Waiting".
- An arrow points to the '(144)' part of the status, labeled "Age of oldest call".

Queue Status	AGTs	CWI (s)	Age of oldest call
Available			
Away			
Busy			
Otp			
Idle			
Bib			
OffLine			
Juicy	AGTs: 1	CWI (s) 0 (0)	
Liberty	AGTs: 1	CWI (s) 1 (144)	