



# **Dynamics Telephony Phone System**

## CRM and Phone in one app

...built for Dynamics 365 users.

# Why Dynamics Telephony PHONE SYSTEM ?

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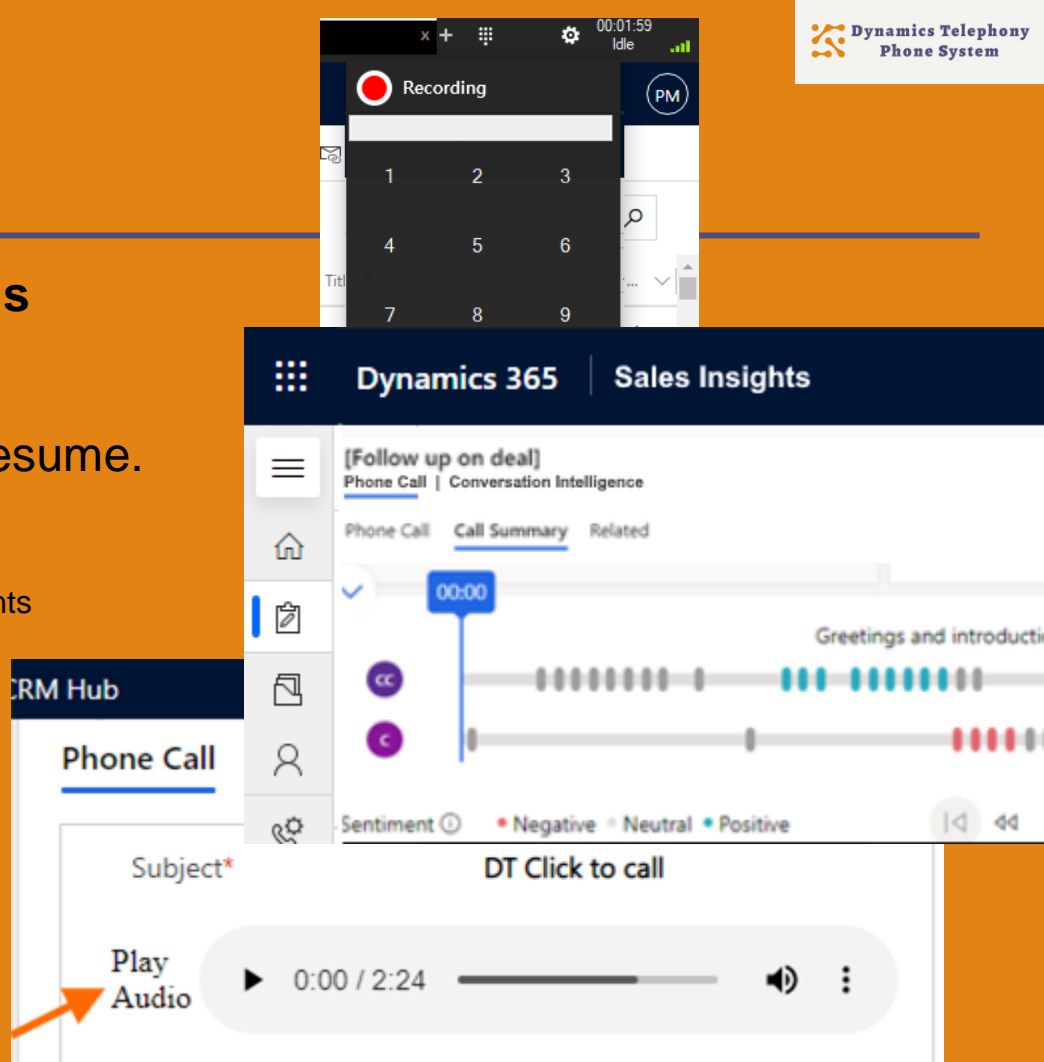
**Ultimate innovation and flexibility when CRM is part of the phone system, from one vendor**

- 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

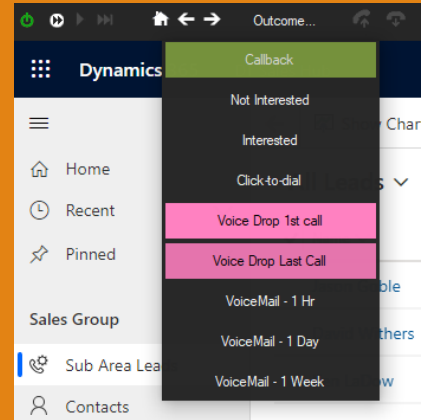
- Controls in DT Client: Pause / Resume.
- Options
  - Suppress recording warning announcements
  - Storage on your server for security or cost management.
  - Recording link in CRM phonecall record - no more searching for recordings
  - Transcript in CRM
  - Send recording to Dynamics 365 Sales Insights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



# Voice Drop

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

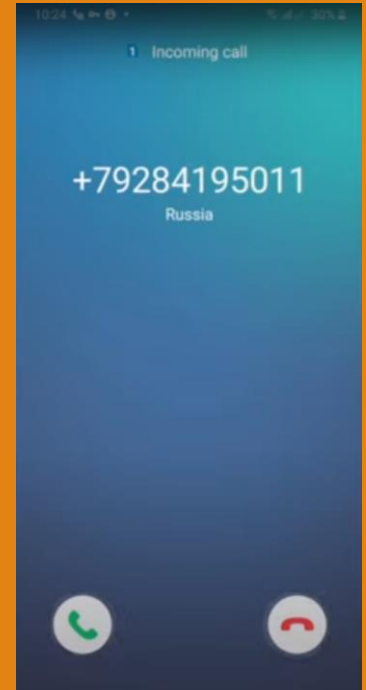
- Play pre-recorded message into customer's voicemail
  - Available on the Outcomes list
  - Can also schedule a retry
  - Definable per queue
  - Definable per agent if you have personal queues
  - Define as many as you need
  - Use your phone to record or listen to the message
- One-click:
  - Play 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.**

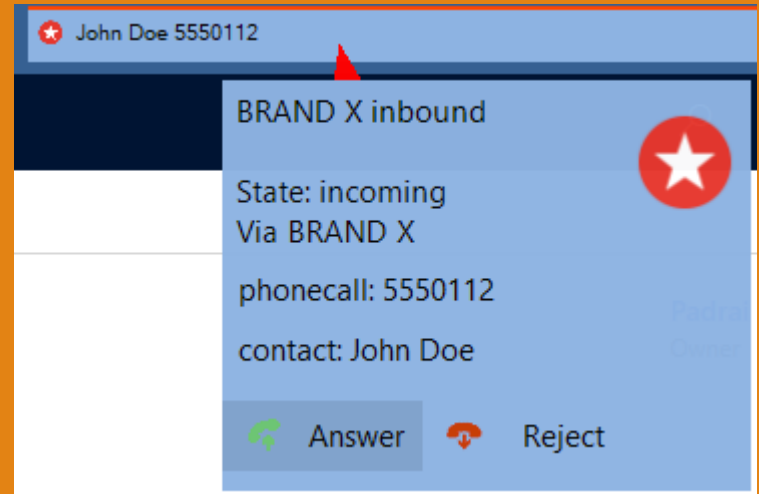
- Define a Calling Number per user (extension)
- Auto-select a calling number per call based on CRM field in the dialed record
  - E.g. campaign name, record owner, or area
  - You can also set a default that is used for all other calls
- Inbound calls to the number can be to a different phone system.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



# Multi-Brand Features

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

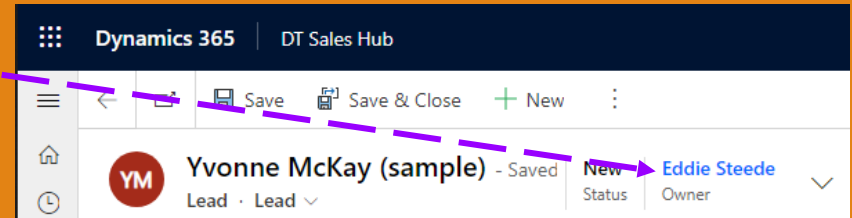
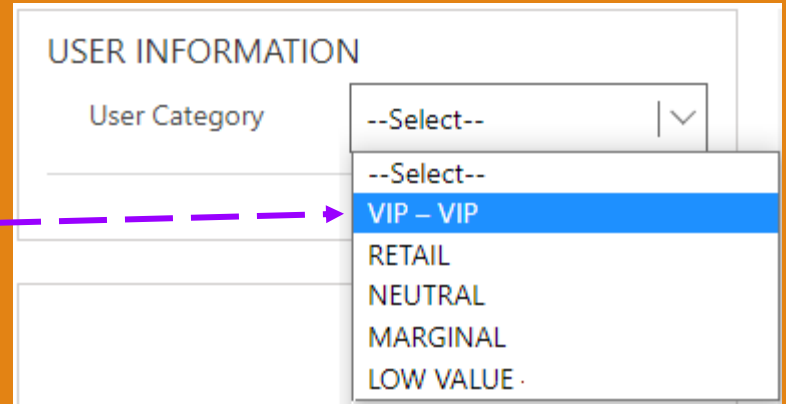
- Pop the brand name and icon with the incoming call
  - User always knows which brand to represent
- Only search for the caller in the correct brand
  - Maintain brand integrity
- Dial customers and display the correct number for the brand
  - In case the customer calls you back



# 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           |             |

CLICK TO CALL

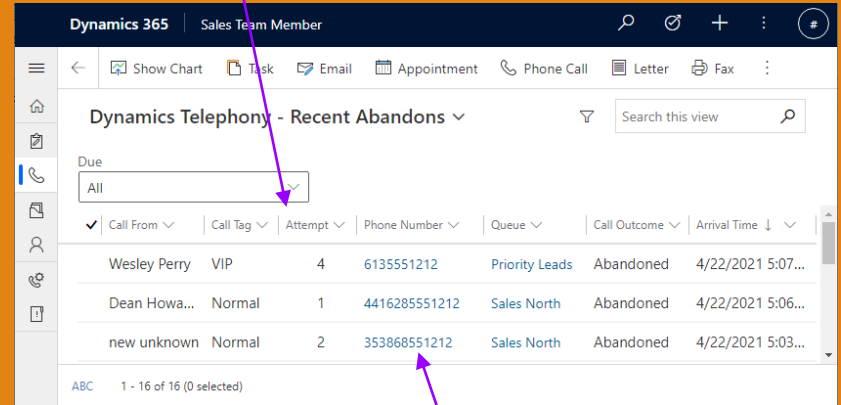


# Don't abandon the abandons!

## 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... |

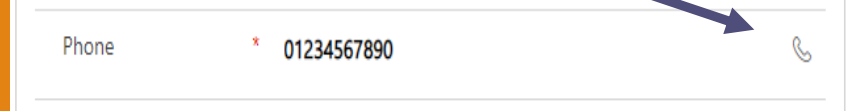
Click To call them back

# 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)'. Three orange arrows point to specific parts of the interface with labels: 'Your status' points to the 'Liberty' queue name, 'Agents staffed' points to the 'AGTs: 1' part of the status, and 'Calls Waiting' points to the '1 (144)' part of the status. A fourth orange arrow points to the '144' with the label '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) | 144                |

# Why Dynamics Telephony

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- Company is solely focused on telephony integration development for Dynamics 365
- We provide a unified seamless Dynamics 365 and telephony experience for the users
- Telephony platform and Dynamics 365 integration application from one vendor.
- 100% uptime on power and 99.999% guarantee on internet connections
- 24/7 operating/support cover in the data centre

## Next Steps

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REQUEST A FREE TRIAL

Email: [dt\\_sales@dynamicstelephony.co.uk](mailto:dt_sales@dynamicstelephony.co.uk)

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