



# Microsoft Dynamics CRM Connector

MAGNIFY THE POWER OF MICROSOFT DYNAMICS CRM IN YOUR SALES, SERVICE, OR HELPDESK ENVIRONMENT WITH CTI FOR CRM.

CTI for CRM helps your organization increase productivity, improve the efficiency of contact center staff and deliver superior customer service by allowing your agents to personalize their response to each caller.

## Overview

Many organizations today are taking advantage of CTI software to improve the productivity of their contact center agents, enhance the customer's experience, increase customer loyalty, and to generate additional revenue. Enhouse Interactive's CTI for CRM provides integration to Microsoft Dynamics using our Microsoft Dynamics CRM Connector.

By connecting directly with Microsoft Dynamics, agents are armed with a 360 degree view of the customer - linking call and caller data. Armed with this information, agents can personalize their interaction with the customer, respond more precisely to customer inquiries and can resolve customer issues on a single call. With responsive and knowledgeable service representatives, your organization will stand out from the crowd and build long-lasting relationships with customers.

## Leverage your Microsoft Investment

Microsoft Dynamics CRM gives you the tools and information to attract prospects, grow sales and deliver personalized service. Now you can integrate your Microsoft CRM with Enhouse Interactive's Communications Center (EICC) to drive even more value out of your investment.

## Information at your fingertips

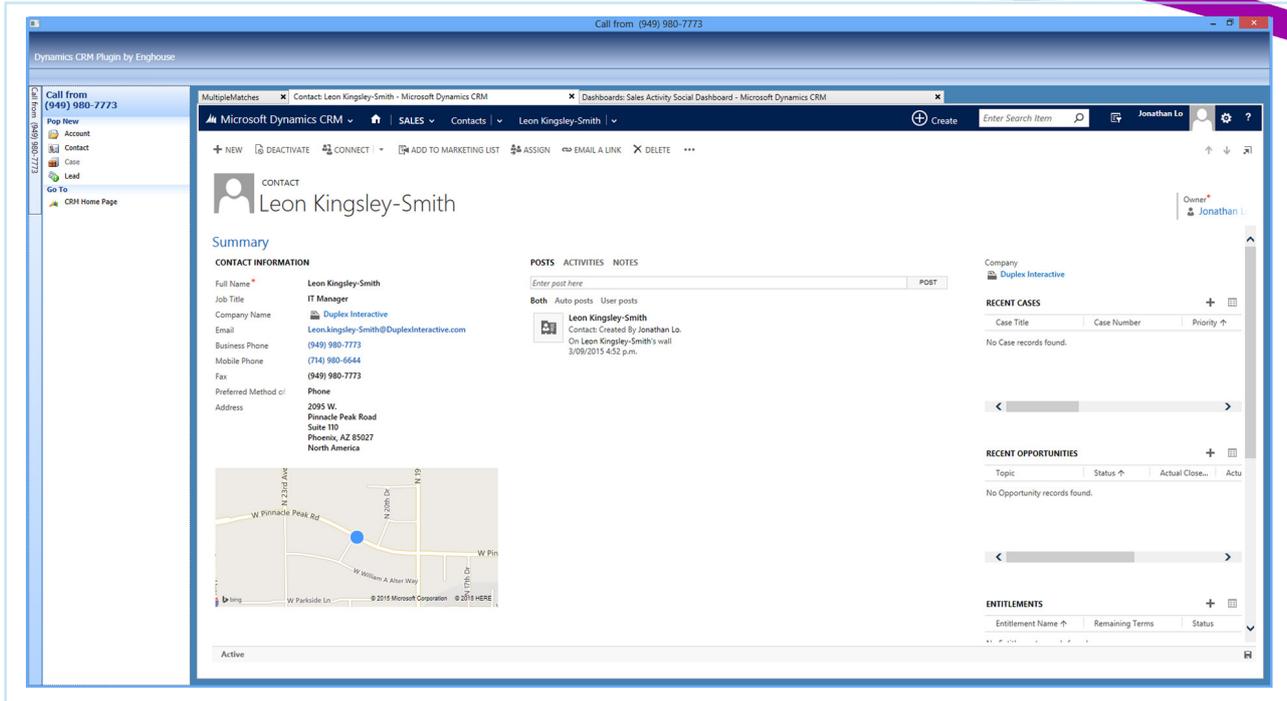
Whether you're in sales, customer service or support, Enhouse Interactive's Microsoft Dynamics CRM Connector helps you process calls faster by automatically presenting the caller's records in your CRM as you answer the call.

## Little things that matter

Not only will your sales and support staff be more efficient, but your customers will appreciate the personal touch when you greet them by name.

## Benefits

- **Reduce call times by 10-20 seconds** with faster, more personalized service - agents have the customer's name and other details available to them before they answer the call.
- **Reduce customer frustration** created by agents repeatedly asking them for the same information each time they call.
- **Present an informed and professional image** of your organization by automatically popping a CRM report showing any previous activities relating to the caller.
- **Reduce costs** by lowering training requirements and introduce considerable workflow efficiencies for agents and knowledge workers.
- **Increase the accuracy of your customer records** by presenting them to your staff for updating every time the customer calls.



## How does it work?

The Microsoft Dynamics CRM Connector captures the Caller ID of an incoming call (or EICC can prompt the caller to enter data such as their customer number) and uses this information to pop a Microsoft Dynamics CRM screen.

You specify which CRM screen will be displayed when a matching number is found. Any CRM screen can be configured to pop, with the defaults being Account, Contact and Lead.

The CRM Connector can also search to see if there are any activities related to this call. If there are, it can pop a CRM report displaying these activities. It comes with the following reports which can be customized to your organization's requirements:

- **Contact Summary report** shows the caller's contact information, current cases and the last 5 phone call activities.
- **Account Summary report** shows the caller's account information, current cases and the last 5 phone call activities.
- **Lead Summary report** shows the caller's lead information, the last 5 Notes and the last 5 phone call activities.
- **Opportunity Summary report** shows the caller's opportunity information, potential customer information, the last 5 notes and the last 5 phone call activities.

If multiple matches are found, the agent will be presented with a report listing all the entries found. The agent can then select the information they want. When no match can be found for an incoming call, the agent can select which entity to create and it will be populated with the call information.

If an agent transfers the caller to another agent, the CRM screen will be transferred to the new agent's desktop. Emails delivered from queues can also generate screenpops in Microsoft Dynamics CRM based on the address of the incoming email.

Emails delivered by EICC Email Queuing can also generate screenpops in Microsoft Dynamics CRM based on the address of the incoming email.

The CRM Connector allows phone numbers to be dialed from within Microsoft Dynamics CRM by simply clicking a button next to a phone number on the Contact, Account or Lead screens.

## About Enghouse Interactive

Enghouse Interactive's integrated suite of solutions includes multi-channel contact center, self-service, attendant operator consoles and workforce optimization. This wide portfolio places us in the unique position to offer customers and partners a complete, fully featured solution from a single vendor. These solutions support the full range of deployment methods from premise-based to private, public or community cloud and even hybrid requirements.