Brief Overview

The inContact Microsoft Dynamics CRM Extension connects your phone system to your CRM, enabling the two solutions to act as one.

Key Features

- Integrated interface
- ANI screen pops
- Click to Dial (CTD)
- DNIS scripts and custom screen pops
- Automated call record creation in CRM
- Multi-tab/multi browser support

inContact Microsoft Dynamics CRM Extension

Leverage the power of an enterprise-class ACD combined with a dynamic CRM platform

inContact has integrated the most-used call controls of inContact directly into Microsoft Dynamics CRM™. The critical parts of both applications are unified into a single interface to enhance agent performance, customer service and customer experience. It is engineered to allow for simple, fast implementation.

When most, or all, of CRM work happens on the phone, the pain of managing a customer system and a phone system separately can be challenging. A good CRM system and a powerful telephony platform won't relieve that pain unless they work together. Without intelligent integration, agents are left to re-key data such as phone numbers, account numbers, and case file ID's. Precious time is wasted manually transporting data from one application to the other and clearing space on the computer monitor.

Users can quickly become frustrated by not being able to automatically open the record of a calling customer, or have the ability to click a number to dial. Without an integrated solution, the simplest call center tasks can seem nearly impossible.

The inContact Microsoft Dynamics CRM Extension solves these problems by providing screen pops based on caller ID or caller input from the IVR. Robust data exchange enables confirmation of CRM data such as customer service level, location, or product. Converging the call data and the CRM data enables intelligent call routing before it ever rings through to the agent. Further, agents can work in multiple browser based applications or tabs and be in control of incoming calls as well as placing outbound calls by clicking on a number.

Benefits

- The inContact Microsoft Dynamics CRM Extension will enable agents to work with multiple tabs and browser applications in a synchronized way. Start the call in the CRM, finish the call with the shipping app; the agent state and call control is synched across the browser app's.

- Access to inContact IVR and the integration to the Microsoft CRM solution mean a smarter, richer screen pop for better and faster service. The calls then shows up in the CRM interface and the Extension enables the agents to manage their calls without ever leaving the CRM.

- The inContact Microsoft Dynamics CRM Extension will decrease handle time and efficiency by integrating the agent's interface and target CRM

application. Agents are able to shave up to two minutes from their call times compared to multi-app, non-integrated environments.

- Integrated screen pops and data pipes eliminate multiple customer transfers. Instead agents can immediately meet the customer's need and create a better overall experience. Eliminate numeric errors in critical contact fields such as phone, address and account numbers.

- Faster and more affordable turn up through packaged integration. No additional expenses are incurred and no ongoing in-house maintenance is necessary.

- Click-to-Dial will speed up outbound contacts and improve accuracy.

- The Microsoft Dynamics CRM Extension automatically creates a CRM record of every call where agents can add notes or other details.