

DOT IT

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Unified Service Desk



Agenda:

1. Dynamics 365 Unified Service Desk

Pourquoi un agent a-t-il besoin d'un centre de service unifié?

Package Unified Service Desk

Intégration de la téléphonie et de Skype for Business

Scénario flux de service clientèle

2. Microsoft Social Engagement and CRM Integration

Comment vous profitez de l'intégration de MSE?

Quelles possibilités de customization pouvant tirer parti des données sociales au sein de votre CRM?

Challenge de créer une expérience client remarquable pour aujourd'hui

43 %

des organisations manquent d'applications pour traiter les demandes de renseignements à travers plusieurs canaux

L'EXPERIENCE CLIENT ?

TEMPS DE SERVICE ETENDU

=



Challenge de créer une expérience client remarquable pour aujourd'hui

32 %

des agents n'ont pas accès aux informations du client, ou à l'historique des interactions.

L'EXPERIENCE CLIENT ?

L'AGENT NE ME CONNAIS PAS

=



Challenge de créer une expérience client remarquable pour aujourd'hui

26 %

des agents passent du temps à localiser les données clients à travers différentes applications

L'EXPERIENCE CLIENT ?

TEMPS D'ATTENTE ETENDU



Challenge de créer une expérience client remarquable pour aujourd'hui



10 %

nombre moyen des applications accessibles par un agent pour répondre aux questions du client.

L'EXPERIENCE CLIENT ?

**RESOLUTION PREMIER APPEL
IMPERTINENTE**

=



Qu'est ce que les clients attendent?

Je m'attends à un agent de service pour ..

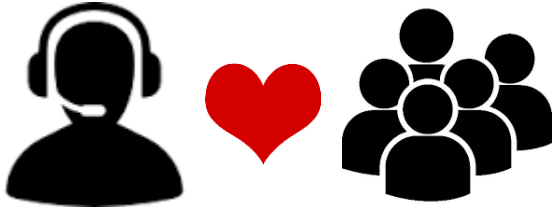
SAVOIR QUI JE SUIS

ME PARLER QUAND ET OÙ VOUS JE VEUX

RESOUDRE MON PROBLEME

RAPIDEMENT

The promise of Unified Service Desk



Des agents plus heureux et plus productifs sont la clé de la construction de la relation clients

- ✓ **Expérience client améliorée**
- ✓ **Agent informé et réactif**
- ✓ **Meilleure résolution**
- ✓ **Traçabilité**

Package Unified Service Desk

USD main panels

Voici de nouveaux «trucs» pour les professionnels du service client, des puissantes fonctionnalités en libre-service dans Dynamics CRM, y compris le centre de service unifié, afin de responsabiliser les agents des centres de contacts pour résoudre facilement les problèmes des clients .

The screenshot displays the Unified Service Desk interface for a case titled "platinum card reward points". The interface is annotated with numbered callouts (1-9) pointing to various features:

- 1: Navigation menu (HOME, DASHBOARD, MY WORK, SEARCH)
- 2: Account selection dropdown (A. Datum Corporation (sample))
- 3: Search bar
- 4: Account name dropdown
- 5: My Work (Stack) tab
- 6: Knowledge Base search bar
- 7: CALL SCRIPT section
- 8: Notes section
- 9: Knowledge Base search results

The main case view includes a progress bar (Identify, Research, Resolve, Next Stage), a list of activities (Find Customer, Find Contact, Find Case), and a summary of case details. The knowledge base search results show articles related to "platinum card reward points", such as "Platinum credit card int..." and "What is a credit card?".

At the bottom, the status bar displays the following metrics:

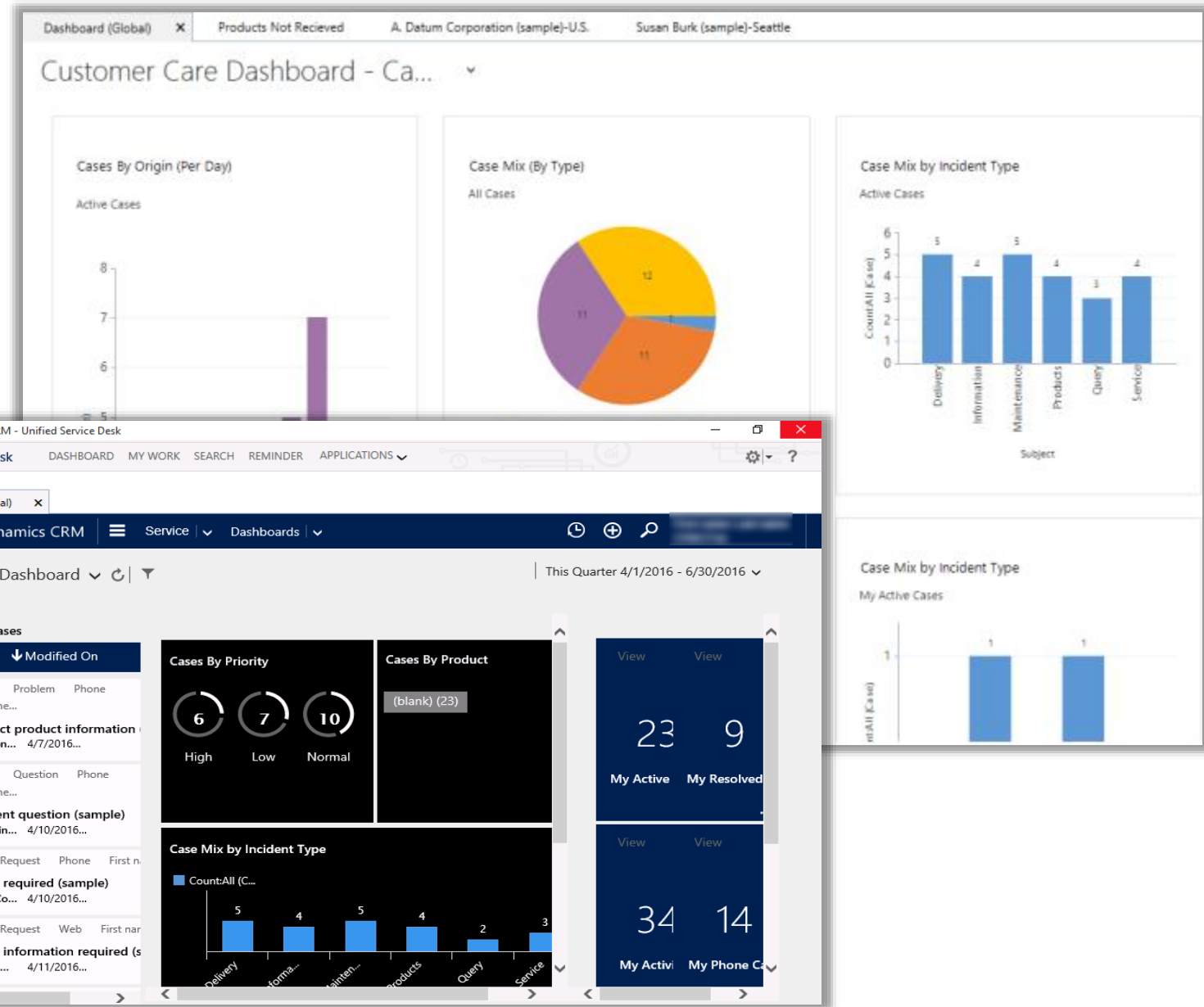
- Avg Case Resolution Time (Sec) : 788
- Number Of Cases Resolved : 9
- CSAT : 2
- Session Time : 00:07:27

1. Tableaux de Bord:

ici, les tableaux de bord du service client CRM, qui nous donne un certain nombre de KPI axé sur la gestion des incidents.

Tableaux de bord Niveau 1: Affichent des listes ou des visualisations de données de service de clé d'agent, telles que des cas actifs, des cas résolus, draft emails et des activités.

Tableaux de bord Niveau 2: Affichent des listes ou des visualisations pour plusieurs indicateurs de performances de service associés à l'agent, tels que des cas actifs, des cas par priorité, des cas par produit, des cas par type d'incident et des totaux des agents pour les cas actifs, les cas résolus, les activités et les appels téléphoniques.



2. Mes tâches:

Affiche la liste de tous les incidents actifs attribués à un conseiller du service. Ça lui montre les activités, ou des éléments sur lesquels il peut travailler.

The screenshot displays a CRM interface for a service case. On the left, the 'General' tab shows customer information for 'Coho Winery (sample)', including email and phone. Below this is a 'CALL SCRIPT' section with a dropdown menu set to 'Request for service for Case Session' and a list of tasks with green checkmarks: 'Verify customer info', 'Select the product', 'Verify entitlement info', 'Review the case', 'Search for a solution', 'Send email', 'Update the notes', 'Resolve case', and 'Close the session'. A 'Notes' section is also visible with a text area.

The main area is titled 'My Work Dashboard' and contains a 'My Activities' section. It features a search bar and a table of activities:

Activity Type	Subject	Regarding	Priority	Start Date	Due Date ↑
Campaign Resp...	test	test	Normal		
Campaign Activ...	test	test	Normal	3/23/2016 12:00 AM	3/23/2016 12:00 AM

Below the activities table is another section titled 'All Cases in Selected Queues' with a search bar and a table with columns: Title, Entered Queue ↑, Queue, Worked By, and Priority (Case). The text 'No records are available in this view.' is displayed below the table.

3. Recherche: ouvre la recherche pour naviguer dans différentes entités. Pour ce package vous pouvez rechercher des comptes, des contacts, des incidents, des activités ou des files d'attente. L'onglet de recherche peut être configuré pour permettre de rechercher un certain nombre d'entités, en nous donnant un mécanisme d'enquête simplifié qui utilise évidemment les vues standard par défaut de CRM

The screenshot displays a CRM interface with a search window open. The search window is titled 'Search (Global)' and shows a list of 'Active Accounts'. The list includes columns for Account Name, Main Phone, Address 1: City, Primary Contact, and Email (Primary Contact). The 'Update the notes' option in the call script is highlighted.

CALL SCRIPT

Request for service for Case Session

- Verify customer info
- ✓ Select the product
- ✓ Verify entitlement info
- ✓ Review the case
- ✓ Search for a solution
- ✓ Send email
- ✓ Update the notes
- ✓ Resolve case
- Close the session

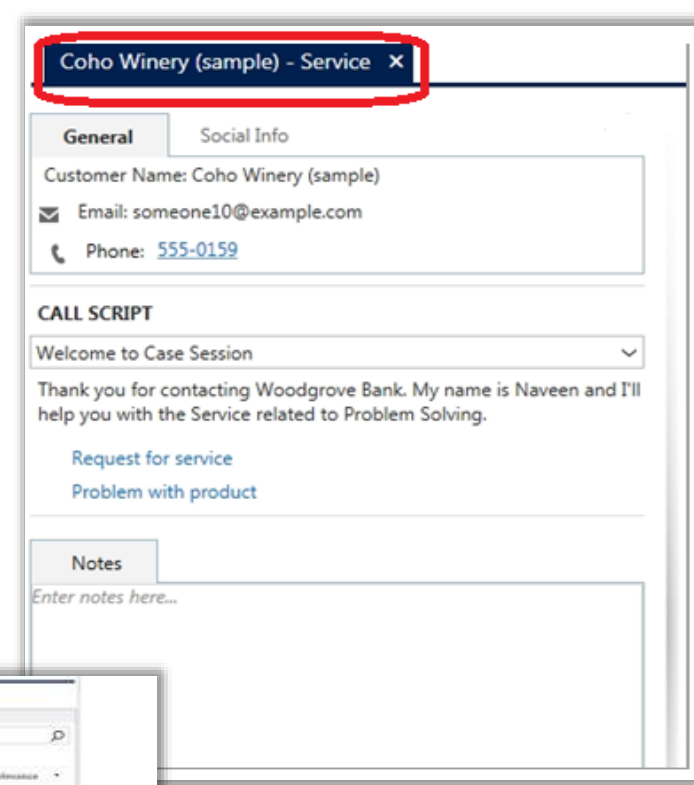
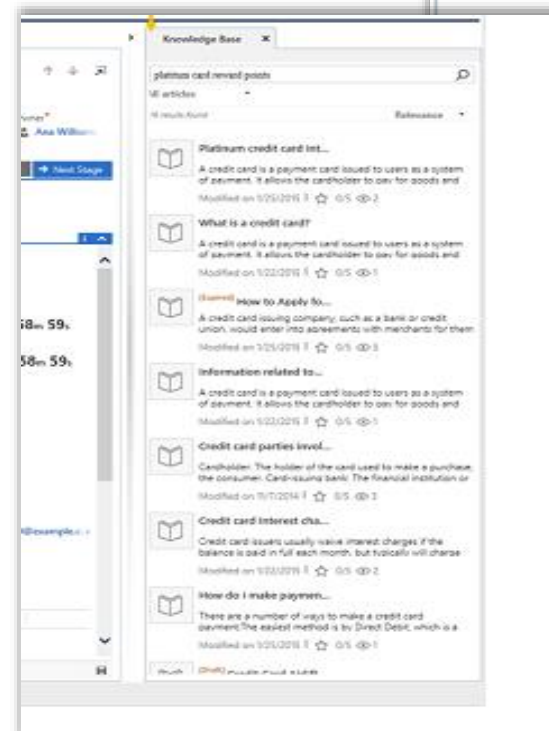
Active Accounts

Account Name	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_j@example.com
Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com
Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.com
Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)	someone_e@example.com
City Power & Light (sample)	555-0155	Redmond	Scott Konersmann (sample)	someone_f@example.com
Coho Winery (sample)	555-0159	Phoenix	Jim Glynn (sample)	someone_j@example.com
Contoso Pharmaceuticals (sample)	555-0156	Redmond	Robert Lyon (sample)	someone_g@example.com
Fabrikam, Inc. (sample)	555-0153	Lynnwood	Maria Campbell (sample)	someone_d@example.com
Fourth Coffee (sample)	555-0150	Renton	Yvonne McKay (sample)	someone_a@example.com
Litware, Inc. (sample)	555-0151	Dallas	Susanna Stubberod (sample)	someone_b@example.com

4. Onglets de session : Lorsque plusieurs sessions client sont ouvertes, chaque onglet affiche une session différente. Les onglets permettent aux conseillers de travailler aisément sur plusieurs incidents client.

5. Volet de gauche: avec Left Nav Panel l'agent peut fournir à son client un support par courrier électronique, appel téléphonique et aussi à travers les réseaux sociaux.

6. Volet de droite: lorsque vous ouvrez une session, le volet de droite s'ouvre automatiquement et vous permet de rechercher des articles dans la base de connaissances.



7. Call Script:

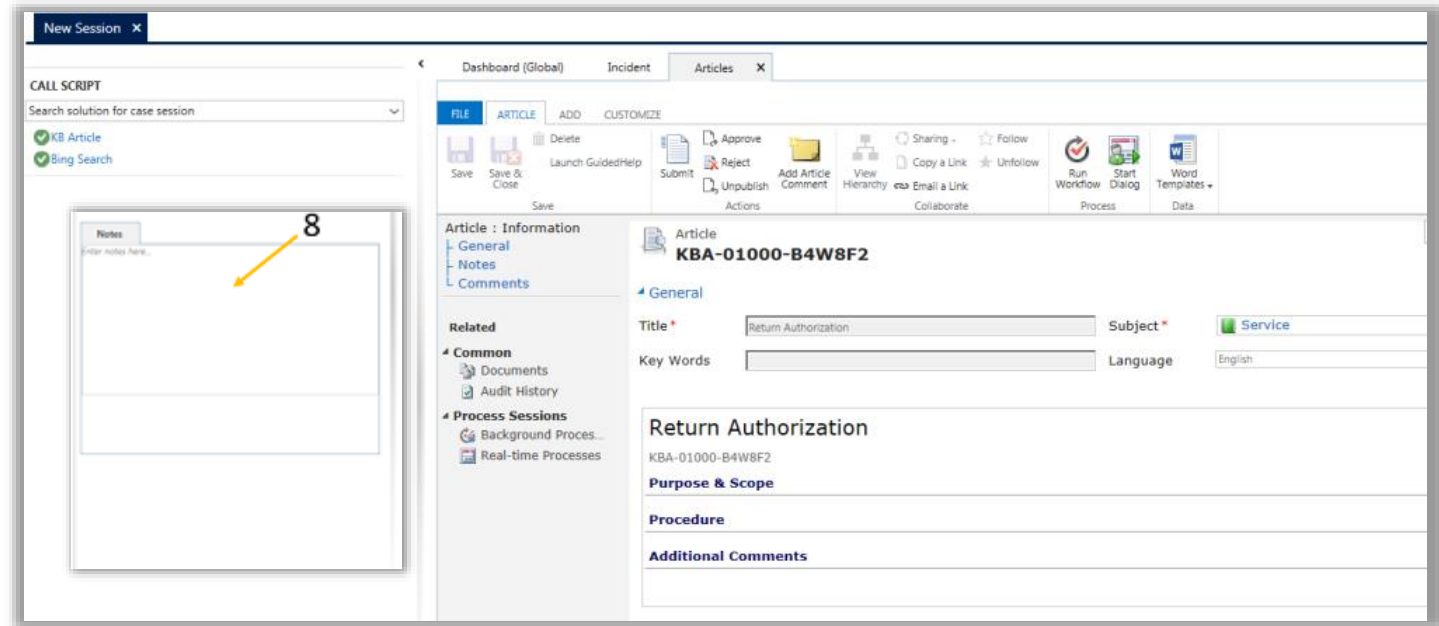
Affiche les scripts d'appel que l'agent de service peut utiliser lorsqu'il travaille sur un incident, pour lui fournir des questions et des réponses contextuelles afin d'accélérer le traitement des demandes des clients. Le script aide à guider l'agent en lui donnant des instructions étape par étape sur la façon de gérer l'incident, et rend le flux du processus très agréable avec la mise jour du panneau principal.


The screenshot displays a CRM interface with two main panels. The left panel, titled 'Coho Winery (sample) - Service', shows customer information (Name: Coho Winery (sample), Email: someone10@example.com, Phone: 555-0159) and a 'CALL SCRIPT' section. The script is titled 'Request for service for Case Session' and lists several steps: 'Verify customer info', 'Select the product', 'Verify entitlement info', 'Review the case', 'Search for a solution', 'Send email', 'Update the notes', 'Resolve case', and 'Close the session'. A 'Notes' button is highlighted with a red box. The right panel shows a 'Problem Solving' case with a progress bar indicating 'Identify (Active)', 'Research', and 'Resolve' stages. Below the progress bar, there are checkmarks for 'Find Customer', 'Find Contact', and 'Find Case'. The 'General' section displays case details: Case Title (Problem Solving), ID (CAS-00034-F7Y9M0), Subject (Service), Customer (Coho Winery (sample)), Origin (Email), Contact (Thomas Andersen (sample)), and Entitlement (--). The 'POSTS', 'ACTIVITIES', 'KB RECORDS', and 'NOTES' tabs are visible, with a message stating 'We didn't find any activity records.'

Le module de script prend en charge la dérivation pour le flux de travail des agents non linéaires. Il supporte également des scripts spécifiques basés sur des variables telles que les boutons définis dans l'interface utilisateur, les événements d'intégration de la téléphonie informatique (CTI) et les paramètres tels que le service d'identification numérique (DNIS). Un historique des étapes est conservé dans une liste déroulante afin que l'utilisateur puisse revenir à une étape précédemment visitée.

8. Note: C'est la zone où on peut consigner des notes relatives à l'incident.

9. Session Tabs: Lorsque vous ouvrez plusieurs sessions client, chaque onglet affiche une session différente. Les onglets facilitent l'utilisation d'un agent sur plusieurs cas clients.



Avg Case Resolution Time (Sec) : 788 Number Of Cases Resolved : 9 CSAT : 2  Session Time 00:07:27

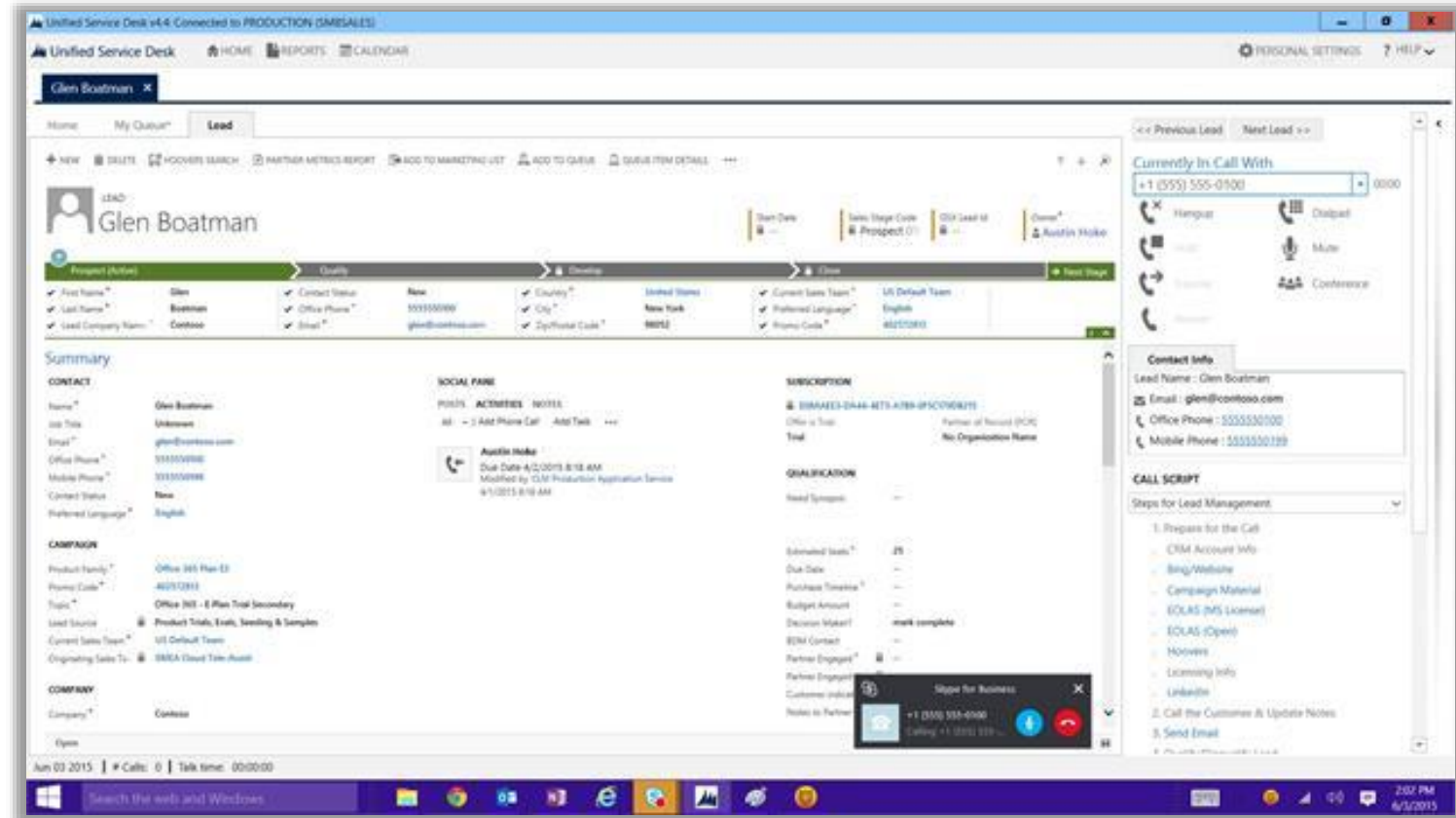
Les fonctionnalités supplémentaires de KPI affichées dans la partie inférieure du client Unified Service Desk comprennent :

- Temps moyen de résolution d'incident (en secondes), affiche la durée moyenne de résolution d'incident calculé en secondes pour l'agent.
- Nombre d'incidents résolus. Affiche le nombre total d'incidents résolus pour l'agent.
- Temps de session : Affiche le temps cumulé au cours duquel l'onglet de session est ouvert.

Intégration du Couplage Téléphonie Informatique (CTI) et de Skype for Business

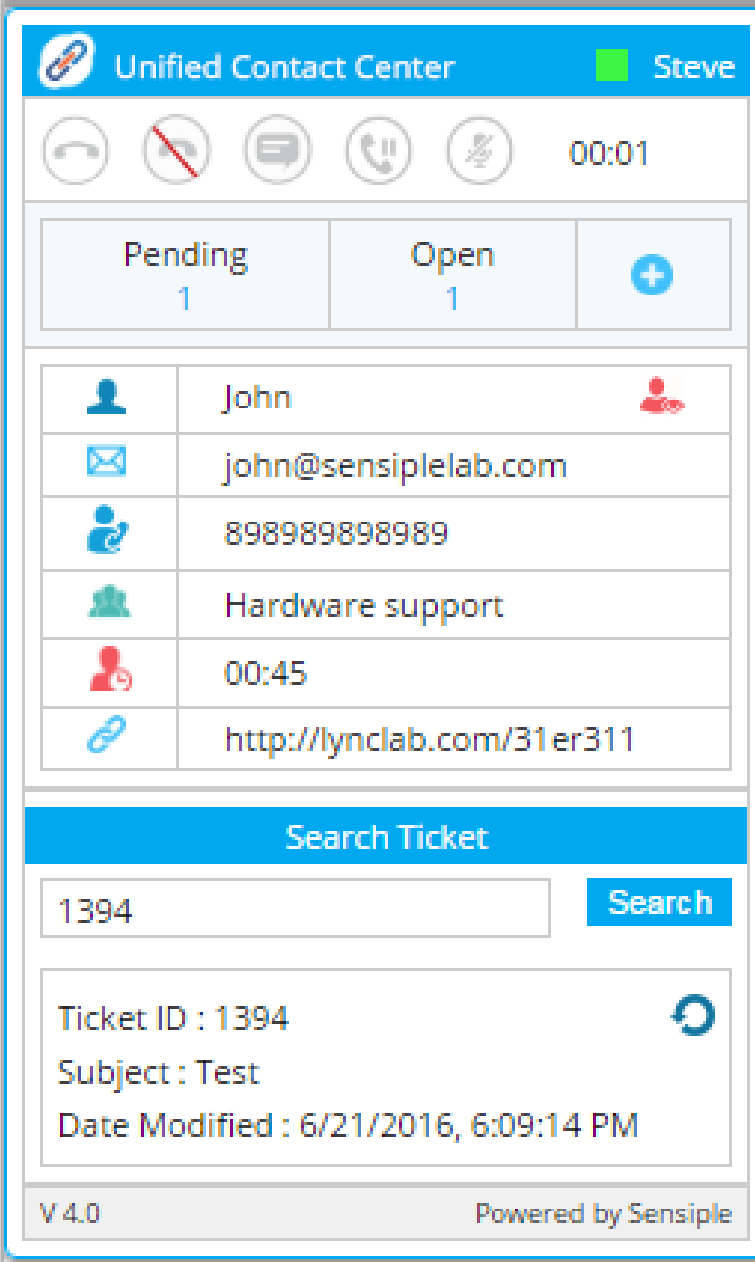
Unified Service Desk étend Skype for Business pour permettre le chat web avec les clients. Il dispose également d'un module de routage qui se connecte avec l'agent disponible. Il offre également un choix pour les chemins d'escalade dans lesquels les agents peuvent fournir un lien pour permettre aux utilisateurs de les rejoindre dans une réunion Skype for Business

D'après le numéro de l'appelant, les informations client correspondantes dans le CRM basée sur un navigateur, peuvent être présentées automatiquement, ensuite, l'agent peut travailler directement à partir de ces informations.



Adaptateurs Skype CTI:

Unified Service Desk fournit des adaptateurs Skype CTI pour améliorer la connectivité transparente avec vos systèmes d'entreprise tels que les CRM, le Service Desk, les systèmes ERP, etc. afin d'améliorer la gestion des appels, l'identification de l'appelant et de fournir à la population de l'écran des détails d'appelant pour améliorer les performances de l'agent.



The screenshot displays the Unified Contact Center interface. At the top, it shows the title "Unified Contact Center" and the user name "Steve". Below this is a row of icons for call control (mute, hold, transfer, etc.) and a timer showing "00:01".

The main content area is divided into several sections:

- A summary bar with "Pending 1", "Open 1", and a plus icon.
- A contact card for "John" with the following details:
 - Name: John
 - Email: john@sensiplelab.com
 - Phone: 898989898989
 - Department: Hardware support
 - Duration: 00:45
 - Link: <http://lynclab.com/31er311>
- A "Search Ticket" section with a search bar containing "1394" and a "Search" button.
- A ticket details section showing:
 - Ticket ID : 1394
 - Subject : Test
 - Date Modified : 6/21/2016, 6:09:14 PM

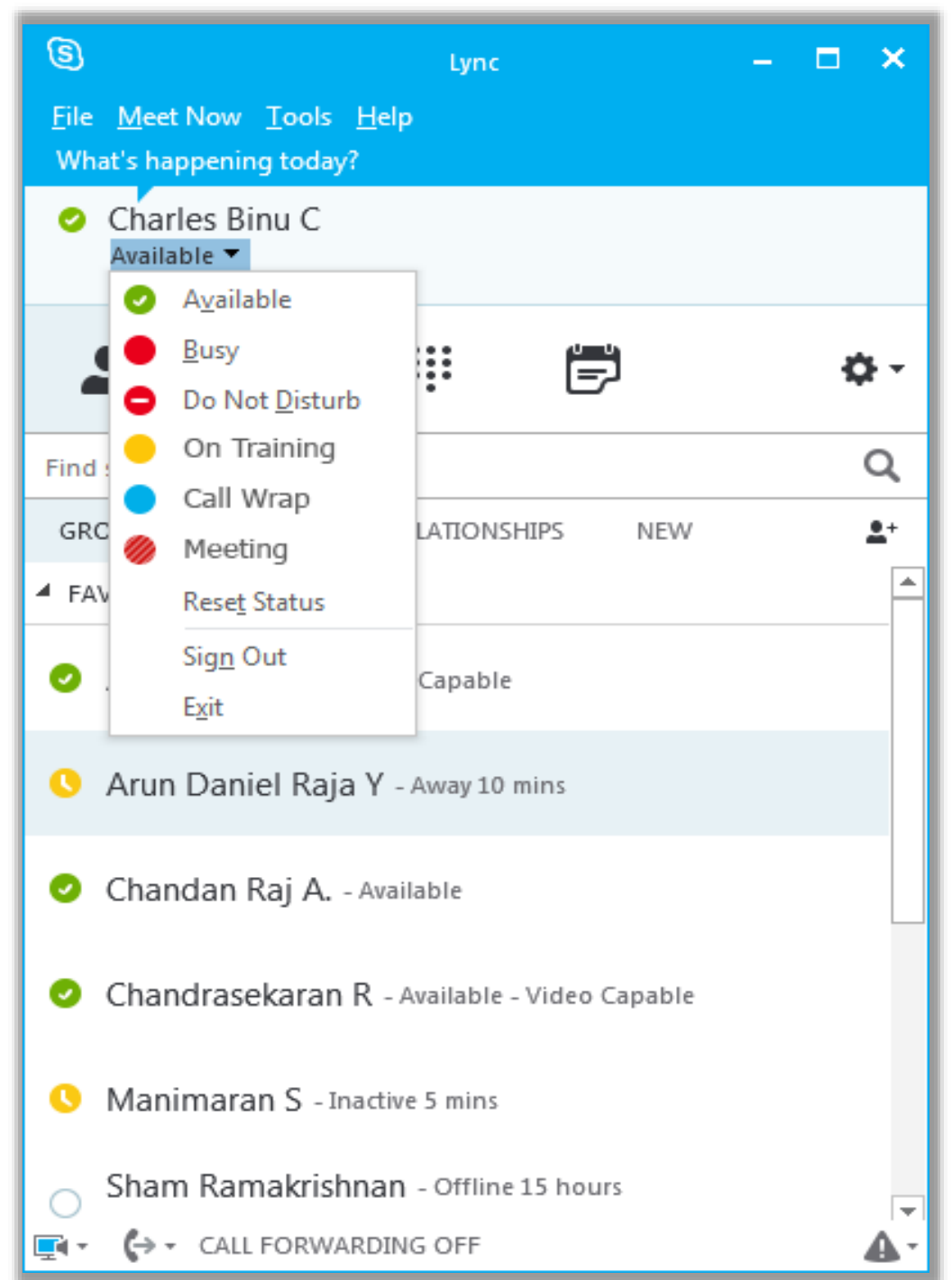
At the bottom, the version "V 4.0" and "Powered by Sensiple" are displayed.

Informations de présence des dans SFB:

Tirer avantage de la présence SFB de l'agent élimine la nécessité à une connexion d'agent distincte.

Smart Routing:

Avec la fonction de routage d'interaction intelligente, les appels du centre de contact sont acheminés vers le bon agent disponible, possédant le bon ensemble d'expertise nécessaire pour répondre à la demande de l'appelant. Cela se traduit par une réduction du temps de résolution et permet d'obtenir une meilleure expérience client.



Customer service flow scenario

- I. Inbound call scenario
- II. Outbound call scenario
- III. Post call wrap-up

I. Inbound Call- Appel Entrant

Microsoft Dynamics CRM - Unified Service Desk

Unified Service Desk DASHBOARD MY WORK SEARCH REMINDER APPLICATIONS

Paul Cannon (sample)

Dashboard (Global) My Work (Global) Complete overhaul required (sample) Paul Cannon (sample) Bing search Articles Search (Global)

Customer Service Representativ...

Day (Created On)	High	Normal	Low
5/31/2014	0	0	1
6/4/2014	0	1	2
6/5/2014	0	0	1
6/6/2014	0	1	0
6/7/2014	0	3	0
6/8/2014	0	1	1
6/9/2014	3	1	0
6/10/2014	3	1	0
6/11/2014	0	1	0
6/25/2014	0	2	0
6/26/2014	0	1	0

My Activities

Search for records

Activity Type	Subject	Regarding	Priority	Start Date	Due Date
Task	Send Contract Renewals	Testing A...	Normal		
Email	Reconnect	3 Month...	Normal		
Email	We haven't heard from you...	3 Month...	Normal		
Email	We haven't heard from you...	3 Month...	Normal		
Task	Get a new mobile battery	Need a n...	Normal		
Email	A case has been opened for your request	New mob...	Normal		
Task	Schedule an appointment with customer (sample)	Maintena...	High	6/7/2014 10:00 AM	6/7/2014 10:00
Task	Evaluation Plan agreed upon (sample)		Normal	6/8/2014 10:00 AM	6/8/2014 10:00

SFB incoming call

skype

Gym Glynn calling

Answer Answer with video Decline

Reconnaissance de l'appel entrant

The screenshot displays the Microsoft Dynamics CRM Unified Service Desk interface. The main window shows the contact profile for Jim Glynn (sample), including contact information and a list of posts. A virtual telephony server (VTS) window is open, showing an active call list with the caller identified as Jim Glynn. The interface includes navigation tabs for Dashboard, My Work, Search, and Reminder, and a sidebar with options like NEW, DEACTIVATE, and CONNECT.

New session
Manage multiple customer simultaneously

CRM Contact information
Show the contact information of the caller in your MS Dynamics CRM

Telephone call manager

CRM inbound caller recognition
The automatic recognition of inbound callers in your MS Dynamics CRM

CONTACT INFORMATION	
Full Name *	Jim Glynn (sample)
Job Title	Owner
Company Name	Coho Winery (sample)
Email	someone_j@example.com
Business Phone	555-0109
Mobile Phone	--
Fax	--
Preferred Method of	Any
Address	7165 Brock Lane Renton, WA 61795 U.S.

POSTS	ACTIVITIES	NOTES
touchpad jumpy	Case: Closed by crm install for Contact Jim Glynn (sample). On touchpad jumpy's wall Yesterday	
touchpad jumpy	Case: Created by crm install for Contact Jim Glynn (sample). On touchpad jumpy's wall Yesterday	
USB Port Doesn't work	Case: Closed by crm install for Contact Jim Glynn (sample). On USB Port Doesn't work's wall Yesterday	

Active Call List [1]	
Inbound	0223456789
Jim Glynn [Purchasing Manager] [Fabrikam, Inc. (sample)]	
Ringing (00:00:05)	

Inbound Call		
Find Caller	Search Results	Create Caller
Select Caller:		
Jim Glynn Fabrikam, Inc. (sample)		

Créer un cas

The screenshot shows a CRM interface for creating a new case. On the left, a contact card for Jim Glynn (sample) is visible, including his email and phone number. Below it is a 'CALL SCRIPT' section with a dropdown menu and a text area containing a welcome message. Underneath are 'Instructions' for the next action, such as 'Create the case', 'Search for a solution', 'Send email', 'Update the notes', and 'Close the session'. At the bottom left is a 'Notes' section with a text input field.

The main 'New Case' form is titled 'New Case' and includes a navigation bar with 'SERVICE' and 'Cases' menus. The form has several fields: 'Priority' set to 'Normal', 'Status' set to 'In Progress', and 'Owner' set to 'crm.install'. A process flow bar shows stages: 'Identify (Active)', 'Research', 'Resolve', and 'Next Stage'. Below this is a 'Summary' section with 'CASE DETAILS' including 'Case Title' (Keyboard won't work), 'ID', 'Subject', 'Customer', 'Type', 'Origin', 'Follow Up By', and 'Responsible Contact'. A dropdown menu for 'Subject' is open, showing options: 'Default Subject', 'Query', and 'Service'. On the right, there are tabs for 'POSTS', 'ACTIVITIES', and 'NOTES', with 'ACTIVITIES' selected and showing 'Add Phone Call' and 'Add Task' options. A message at the bottom right states 'We didn't find any activity records.'

Annotations in blue callouts point to specific elements:

- 'accomplished stage' points to the 'Identify (Active)' stage in the process flow.
- 'Business Process' points to the 'crm.install' owner field, with a sub-note: 'Business rules from contact initialisation to resolution'.
- 'Case capture' points to the 'Next Action' instructions section.
- 'Calling notes' points to the 'Notes' text input field.

Chercher une solution

Paul Cannon (sample) Jim Glynn (sample) X

Contact: Jim Glynn (sample)
Email: someone_j@example.com
Phone: 555-0009

CALL SCRIPT
Welcome to Contact Session
Welcome Jim Glynn (sample). Thank you for contacting Woodgrove Bank. My name is crm. How can I help you today?
Instructions
Next Action:
Create the case
Search for a solution
Send email
Update the notes
Close the session

Dashboard (Global) My Work (Global) Jim Glynn (sample) Keyboard won't work Bing search Articles

Published Articles

Number	Subject	Language	Title
KBA-0000-HOT...	Service	English(GB)	Return Authorization
KBA-0000-R7T...	Query	English(GB)	Operating Manuals
KBA-0000-Q31...	Query	English(GB)	Order Shipping time
KBA-0000-LDP...	Service	English(GB)	Booking Overhauling Service
KBA-0004-V4P...	Service	English(GB)	Keyboard is not working

Article : Information
General
Notes
Comments

Article
KBA-01004-V4P9V4

General
Title* Keyboard is not working Subject*
Key Words Language

Related
Common
Documents
Audit History
Process Sessions
Background Process...
Real-time Processes

Keyboard is not working
KBA-01004-V4P9V4
Problem
Keyboard stopped functioning
Solution
If your keyboard stopped working, did it happen while you were typing, or did you notice it right after starting the computer up?
Other than an extreme obvious situation like spilling water on the keyboard, if your

Paul Cannon (sample) Jim Glynn (sample) X

Contact: Jim Glynn (sample)
Email: someone_j@example.com
Phone: 555-0109

CALL SCRIPT
Welcome to Contact Session
Welcome Jim Glynn (sample). Thank you for contacting Woodgrove Bank. My name is crm. How can I help you today?
Instructions
Next Action:
Create the case
Search for a solution
Send email
Update the notes
Close the session

Notes
spilled on keyboard

Dashboard (Global) My Work (Global) Jim Glynn (sample) Keyboard won't work Bing search X Articles

WEB IMAGES VIDEOS MAPS NEWS MORE

bing Keyboard won't work Service

100,000 RESULTS Any time

Keyboard won't work on laptop - Microsoft Community
answers.microsoft.com/en-us/.../keyboard-wont-work-on-laptop/...
Last updated: Mar 08, 2014 · 6 posts · First post: Feb 27, 2011
Keyboard won't work on laptop I just woke my laptop up and the keyboard didn't work every key that i hit typed 5. So I restarted my laptop and now ...
Vista will not BOOT, keyboard won't work . Jul 24, 2010 Resolved
MIDI Piano/Keyboard won't work. PLEASE RESPOND ... Oct 06, 2011

My Mouse & Keyboard Won't Work | eHow - eHow | How to ...
www.ehow.com > Computers > Computer Hardware > Mice & Keyboards >
My Mouse & Keyboard Won't Work. The mouse and keyboard are integral parts of your computer, so when they stop working it is a big problem. Without keyboard and ...

My Keyboard Won't Respond When Reinstalling the XP Service ...
www.ehow.com > ... > Computer Troubleshooting > PC Troubleshooting >
My Keyboard Won't Respond When Reinstalling the XP Service Pack CD. Most of the time, reinstalling the Windows XP Service Pack won't cause any problems with ...

keyboard won't work
social.technet.microsoft.com/Forums/windows/en-US/492a772c-e72e...

Related searches
Keyboard Won't Work
My Keyboard Won't Work
Why Won't Keyboard Work
Computer Keyboard Won't Work
Laptop Keyboard Won't Work
Letter on Keyboard Won't Work
My Computer Keyboard Won't Work
Dell Laptop Keyboard Won't Work

Envoyer un email

The screenshot displays a CRM interface for a contact named Jim Glynn (sample). The main window is titled 'New Email' and includes a header with navigation options like 'Dashboard (Global)', 'My Work (Global)', and 'Jim Glynn (sample)'. Below the header, there are action buttons: 'SEND', 'SAVE', 'INSERT TEMPLATE', 'INSERT ARTICLE', and 'FORM'. The email form itself has fields for 'Priority' (Normal), 'Due' (---), 'Status Reason' (Draft), and 'Owner' (crm install). The 'From' field is set to 'crm install' and the 'To' field is 'Jim Glynn (sample)'. There is a large text area for the email body and an 'Attachments' section at the bottom.

On the left side, there is a 'CALL SCRIPT' section with a dropdown menu showing 'Welcome to Contact Session'. Below it, a 'Next Action:' list includes 'Create the case', 'Search for a solution', 'Send email', 'Update the notes', and 'Close the session'. At the bottom left, there are two 'Notes' tabs; the active one shows 'spilled on keyboard send email'.

Four blue callout boxes provide additional information:

- 'Open email tab linked to the case by default' points to the 'New Email' header.
- 'Add article' points to the 'INSERT ARTICLE' button.
- 'Attach documents' points to the 'Attachments' section.
- 'Choose email template' points to the 'EMAIL' dropdown menu.

The email body text reads: 'Dear Jim Glynn (sample), According to our records, your request has been fulfilled and the case Keyboard won't work is now closed. Should you encounter the same issue again, please send e-mail to crm install and use CAS-01045-K1C7V4 as the case reference. We hope that we have responded to your request in a timely and professional manner. see below: Thank you. Keyboard is not working'.

Notes mises à jours

The screenshot displays a CRM interface for a case titled "Keyboard won't work". The interface is divided into several sections:

- Contact Information:** Contact: Jim Glynn (sample), Email: someone_j@example.com, Phone: 555-0109.
- CALL SCRIPT:** A dropdown menu showing "Welcome to Contact Session" and a text area with the message: "Welcome Jim Glynn (sample). Thank you for contacting Woodgrove Bank. My name is crm. How can I help you today?"
- Instructions:** A list of tasks with checkboxes: "Create the case", "Search for a solution", "Send email", "Update the notes", and "Close the session".
- Case Details:** Priority: Normal, Created On: 6/26/2014 10:15 AM, Status: In Progress, Owner: crm install.
- Process Flow:** A horizontal bar chart showing stages: Identify (Active), Research, and Resolve. A second bar below it shows completed stages: Identify, Research, and Resolve (Active).
- Case Details Table:**

Field	Value
Case Title*	Keyboard won't work
ID	CAS-01045-K1C7V4
Subject	Service
Customer*	Jim Glynn (sample)
Type	Problem
Origin	Phone
- Activities:** A list of activities including "Email" and "Add Phone Call". A blue callout bubble points to the "Email" activity with the text "Email sent out".
- Notes:** A text area containing the note: "spilled on keyboard send email".

II. Outbound Call-Appel Sortant

Numérotation à partir du CRM (liste de contact)

Cette approche assure la facilité de la numérotation depuis n'importe quel endroit de votre CRM

The screenshot displays the Dynamics CRM interface. The main window shows a list of 'Active Contacts' with columns for Full Name, Email, and Company Name. The contact 'Daniel Thompson' is selected. A green arrow points from the text 'CRM Contact List Dialing' to this row. To the right, a 'Dynamics CRM Dialer' window is open, showing a list of 'Dial CRM Entity' (Daniel Thompson, Ann Beebe, Bob Smith, Alex Litton) and a 'Dial: Daniel Thompson' section with phone numbers: Business Phone (555) 321-1234, Home Phone (555) 321-8789, and Mobile Phone (555) 112-8652. A 'Dial' button is at the bottom of this window. A green arrow points from the text 'Dynamics CRM Dialer' to this window. A central green box contains text explaining the process.

CRM Contact List Dialing

Selecting a CRM entity (e.g. CRM Contact) from a list within Dynamics CRM will place the selected entity into the Dynamics CRM Dialer, whereby this entity can then be dialed.

Dynamics CRM Dialer

The Dynamics CRM Dialer provides a list of CRM entities based upon the context of what is currently selected in Dynamics CRM. Select the CRM entity you wish to dial along with the telephone number to be dialed.

Full Name	Email	Company Name	Phone Number
Cindy Dodd	someone@example.com	Curbside Sporti	
Connie Coffman	Someone@example.com	Discount Bikes	
Connor Fearor	Someone@example.com	Amazing Bikes	
Daniel Thompson	daniel.thompson@bikebouttique.com	<u>Bike Boutique</u>	
Darren Parker	Someone@example.com	Cheap n Best Bl	
Darrius Stasevicius	dstasevicius@amazingbikes.com	Amazing Bikes	
David Campbell	someone@example.com	Speedy Bike Sto	
David Johnson	someone@example.com	Speedy Bike Sto	
David Jones	someone@example.com	Little Bicycle Su	
David Liu	someone@example.com	Warm Bikes	(555) 321-6412
David Martinez	someone@example.com	Fast and Fun Bikes	(555) 321-0009
Edward Kyel	Someone@example.com	Real Estate Giants	(555) 435-2785
Jack Morris	Someone@example.com	The Cracker Box	01742876298

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Composition à partir d'un contact CRM

Lorsque vous opérez à partir d'une interface d'un contact CRM, le système téléphonie intégré présentera cette entité à l'intérieur du composeur

The screenshot displays the Microsoft Dynamics CRM interface for a contact named Daniel Thompson. The contact's summary information is shown on the left, including his full name, job title (Office Manager), company (Bike Boutique), email, and phone numbers. On the right, a 'Dynamics CRM Dialer' window is open, showing a list of CRM entities (Daniel Thompson, Ann Beebe, Bob Smith, Alex Litton) and a 'Dial' button. Two callouts provide details about the dialing process.

CRM Contact Entity Dialing
Displaying a CRM entity (e.g. CRM Contact) within Dynamics CRM will place the displayed entity into the Dynamics CRM Dialer, whereby this entity can then be dialed.

Dynamics CRM Dialer
The Dynamics CRM Dialer provides a list of CRM entities based upon the context of what is currently selected in Dynamics CRM.
Select the CRM entity you wish to dial along with the telephone number to be dialed.

CONTACT INFORMATION	
Full Name	Daniel Thompson
Job Title	Office Manager
Company Name	Bike Boutique
Email	daniel.thompson@bikeboutique.com
Business Phone	(555) 321-1234
Mobile Phone	(555) 112-6652
Fax	--
Preferred Method of Address	Any
Address	2601 Cambridge Drive Snohomish, WA 26367 U.S.

Dial: Daniel Thompson	
Business Phone	(555) 321-1234
Home Phone	(555) 321-6789
Mobile Phone	(555) 112-6652

Composer des contacts à partir d'un cas CRM

Tous les appels liés aux cas ou opportunités CRM seront automatiquement enregistrés

The screenshot displays the Microsoft Dynamics CRM interface for a case titled "Brake lever damaged". The case details include a priority of "Normal", created on "9/25/2014 8:57 AM", and a status of "In Progress". The "Identify (Active)" step is highlighted, showing tasks for "Find Customer" (Daniel Thompson) and "Find Case" (Brake lever dama...).

The "Summary" section shows "CASE DETAILS" for the case, including the title, ID (CAS-01041-M3M585), subject, customer (Daniel Thompson), type (Problem), origin (Phone), and follow-up date (9/29/2014). The "CUSTOMER DETAILS" for Daniel Thompson are also visible, including company (Bikr), email (daniel.tl), and phone numbers (Mobile: (555) 11, Business: (555) 32).

The "Dynamics CRM Dialer" window is open, showing a list of CRM entities: Daniel Thompson, Ann Beebe, Bob Smith, and Alex Litton. The "Dial: Daniel Thompson" section shows phone numbers: Business Phone ((555) 321-1234), Home Phone ((555) 321-6789), and Mobile Phone ((555) 112-6652). A "Dial" button is present at the bottom of the dialer.

Annotations provide the following information:

- CRM Entity Related Dialing:** It is possible to make telephone calls from related CRM entities such as CRM Cases and CRM Opportunities, by calling from the entity's respective detail display within Microsoft Dynamics CRM. The CRM Account/Contact relating to the entity will appear in the Dynamics CRM Dialer, ready to be dialed. This approach applies to both CRM Cases and CRM Opportunities.
- Dynamics CRM Dialer:** The Dynamics CRM Dialer provides a list of CRM entities based upon the context of what is currently selected in Dynamics CRM. Select the CRM entity you wish to dial along with the telephone number to be dialed.
- Automatic Call Association:** When dialing from a related CRM entity (e.g. CRM Case), the related entity automatically becomes associated to the telephone call.

III. Post Telephone Call Wrap-up

Call activity management

Récapitulatif en temps réel des appels entrants et sortants et de leur gestion. Les rapports peuvent inclure des informations complètes sur les files et les temps d'attente, le nombre d'appels et la performance des agents. Ils peuvent être affichés par exemple sur un écran mural dans le centre d'assistance.

The screenshot displays the Microsoft Dynamics CRM interface for 'All Phone Calls'. The top navigation bar includes 'Microsoft Dynamics CRM', 'WORKPLACE', and 'Activities'. Below the navigation, there are icons for TASK, EMAIL, APPOINTMENT, PHONE CALL, LETTER, FAX, and SERVICE ACTIVITY. The main content area shows a list of phone calls with columns for Subject, Call From, Call To, Regarding, Direction, and Activity Status. The list includes various call records such as 'Call To: Daniel Thompson' and 'Call From: Feanor'. A search bar and a 'Due' dropdown are also visible.

Subject	Call From	Call To	Regarding	Direction	Activity Status
Call To: Daniel Thompson	Edward Kyei	Daniel Thompson	Brake lever...	Outgoing	Completed
Call To: Daniel Thompson	Edward Kyei	Daniel Thompson	Brake lever...	Outgoing	Completed
Call To: Daniel Thompson	Edward Kyei	Daniel Thompson	Brake lever...	Outgoing	Completed
Call To: Daniel Thompson	Edward Kyei	Daniel Thompson	Brake lever...	Outgoing	Completed
Follow-up call to Daniel Thompson to confirm delivery	Edward Kyei	Daniel Thompson	Brake lever...	Outgoing	Completed
Call To: Marc Collins Trading	Steve Blenkham	Marc Collins Trading	case test	Outgoing	Completed
Call From: Feanor	Connor Feanor	Steve Blenkham	Connor Fea...	Incoming	Completed
Call From: Feanor	Steve Blenkham	Connor Feanor	Connor Fea...	Outgoing	Completed
Call From: Feanor	Connor Feanor	Steve Blenkham	Connor Fea...	Incoming	Completed
Call To: Marc Collins Trading	Steve Blenkham	Marc Collins Trading	Customer S...	Outgoing	Completed
Call To: Marc Collins Trading	Steve Blenkham	Marc Collins Trading	Customer S...	Outgoing	Completed
Call To: Marc Collins Trading	Steve Blenkham	Marc Collins Trading	Customer S...	Outgoing	Completed
Call From: Daniel Thompson	Daniel Thompson	Edward Kyei	Daniel Tho...	Incoming	Completed

CRM Activity Management
Each telephone call achieved using intelli-CTi is automatically recorded in the Dynamics CRM Activity/History, against each of the CRM entities the telephone call relates to (e.g. CRM User, Account, Contact, Lead, Opportunity, Ticket etc.).

Phone Call List
Here shows a complete list of telephone calls made and received to a CRM entity (Contact). This activity list is automatically achieved through the call management of intelli-CTi.

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Call Activity Follow-up

CRM Activity Phone Call Follow-up

intelli-CTi provides the easy ability to create (from a single click) a follow-up CRM Phone Call Activity within Microsoft Dynamics CRM.

Microsoft Dynamics CRM | WORKPLACE | Activities | Call : Daniel Tho... | Create

MARK COMPLETE | CLOSE PHONE CALL | CONVERT TO | DELETE | EMAIL A LINK | FORM | ASSIGN | ...

PHONE CALL

Call From: Daniel Thompson

Priority Normal | Due -- | Status Open | Owner Edward Kyei

Subject	Call From: Daniel Thompson
Call To	Edward Kyei
Call From	Daniel Thompson
Phone Number	5553211234

Direction Outgoing

Description

Schedule a follow-up call to Daniel to ensure he has received and is happy with the replacement part that we shipped him.

Notes from previous Call:

Received a call from Daniel to say that the brake lever on the new bike we shipped him was damaged on arrival.

I have offered to ship him a replacement lever immediately for which he was happy.

After the call I contacted shipping and arranged for the replacement part to be shipped as soon as possible...

Regarding Brake lever damaged

Duration --

Open

Carry Forward Previous Content

When scheduling a follow-up Phone Call Activity using intelli-CTi, this will automatically bring forward into the follow-up Activity all previous content from the current or previous telephone call (e.g. Subject, Notes, Regarding, Categorization, plus all previous CRM entity relationships).

Call History Tracking

Microsoft Dynamics CRM | SALES | Contacts | Daniel Thompson | Create

Common

ACTIVITIES | CONNECTIONS | ALERT HISTORY | **CALL HISTORY**

Call History Associated View

+ ADD NEW CALL HISTORY | + ADD EXISTING CALL HIST... | RUN REPORT | EXPORT CALL HISTORY

End Time	Subject	Call Duration	Direction	Call Result	Case
9/25/2014 5:58 AM	Call To: Daniel Thompson	00:00:07	Inbound	Established	Brake lever da...
9/25/2014 5:48 AM	Call To: Daniel Thompson	00:00:11	Outbound	Established	Brake lever da... Edward Kyei
9/25/2014 5:33 AM	Call To: Daniel Thompson	00:01:23	Outbound	Established	Brake lever da... Edward Kyei
9/25/2014 5:30 AM	Call To: Daniel Thompson	00:00:06	Outbound	Established	Brake lever da...
9/25/2014 5:29 AM	Call To: Daniel Thompson	00:00:29	Outbound	Established	Brake lever da...
9/25/2014 5:28 AM	Call To: Daniel Thompson	00:04:14	Outbound	Established	Brake lever da...
9/25/2014 5:23 AM	Call From Daniel Thompson	00:00:33	Inbound	Established	Brake lever da...
9/25/2014 5:21 AM	Call To: Daniel Thompson	00:00:38	Outbound	Established	Brake lever da...
9/25/2014 5:20 AM	Call To: Daniel Thompson	00:00:34	Outbound	Established	Brake lever da...
9/25/2014 5:15 AM	Call To: Daniel Thompson	00:15:24	Outbound	Established	Brake lever da...

Active

Related Call History
A link to intelli-CTi "Call History" is shown for each CRM entity that has related call history (e.g. Accounts, Contacts, Leads, Opportunities, Cases, etc.)

Call History (for Contact)
A complete list of intelli-CTi Call History for a CRM Contact.

intelli-CTi "Call History"
For each CRM entity that relates to telephone activity (e.g. CRM Accounts, Contacts, Leads, Cases, Opportunities), intelli-CTi provides a detailed log of each telephone call interaction.

Call Dashboards

Toutes les données concernant les appels entrants pour le centre d'assistance sont collectées. Ces informations peuvent être exploitées pour compiler différents rapports, visant à faciliter le suivi de la qualité du centre d'assistance et celui de la performance des agents

