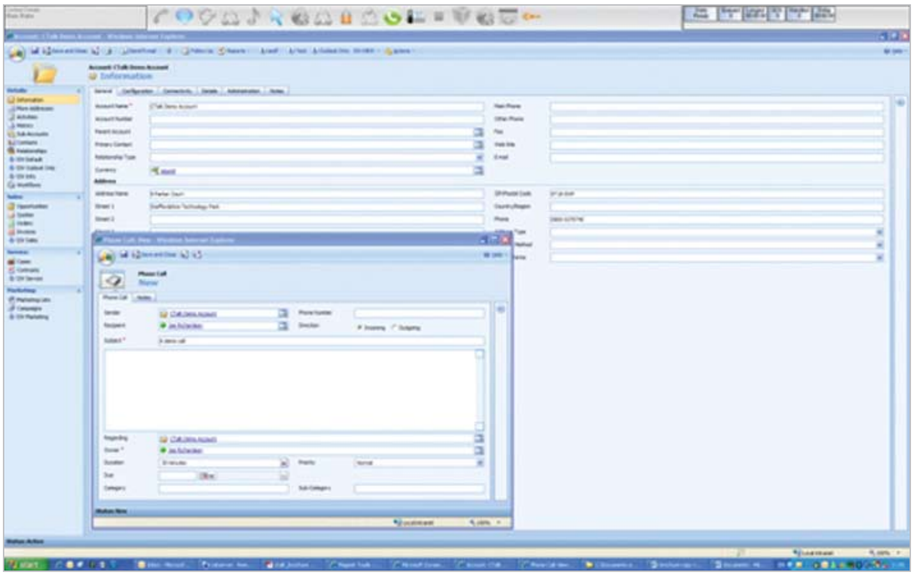
MICROSOFT DYNAMICS CRM INTEGRATION

An automatic CRM screen pop for agents, enabling them to have the correct information in front of them as they receive calls.
This allows agents to dynamically update the CRM during the call with customers.

Ease of integration

Integration with Microsoft Dynamics CRM is achieved through using the URLs of CRM to display the relevant aspects of the system. This process takes advantage of the fact that CRM is web-based, and provides interfaces for integration with other systems through Web Services. The web-based agent interface includes an embedded Internet Explorer control, which displays the CRM to the agent as shown below.



Contact us Enterprise House, Block F4, Trentham Business Quarter, Bellringer Road, Trentham Lakes South, Stoke-on-Trent, Staffordshire, ST4 8GB
Tel: 01782 645195, Fax: 0870 870 0001, interested@mxdigital.co.uk

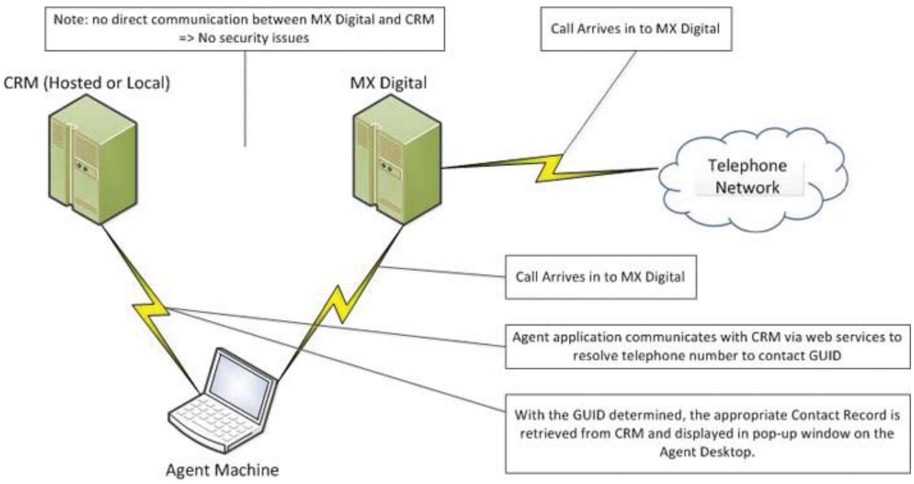
Microsoft Dynamics CRM Integration

Screen pop

When a call arrives (either an inbound call, or an outbound call being initiated) the agent software has access to various details about the call, including the other party's telephone number (unless it has been withheld). CRM has the facility to display the customer's contact record based on the records GUID (unique ID number).

To display the correct customer based on their telephone number involves an intermediate lookup, comparing the telephone numbers in CRM's database for the customers with the telephone number of the current call. With this step complete, the customer's GUID can be identified. This process takes advantage of CRM's web-services interfaces.

With the correct GUID identified, the system can then retrieve and display the appropriate records from the CRM system for the agent while on the call. The entire process takes a matter of 1 – 2 seconds, depending on the speed of the CRM system itself. In addition, the look-up is performed from the agent machine, not from the centric platform. The result of which is that no security issues or concerns are introduced. The process is illustrated below:



The agent identifies different call types (e.g. Agent to agent, inbound, outbound, predictive) and can perform a different action for each if required. In addition, if a customer record cannot be looked up (for example when dealing with a new customer) the system can display the new contact form, so that a contact's details may be recorded in CRM for future reference.

Contact us Enterprise House, Block F4, Trentham Business Quarter, Bellringer Road, Trentham Lakes South, Stoke-on-Trent, Staffordshire, ST4 8GB
Tel: 01782 645195, Fax: 0870 870 0001, interested@mxdigital.co.uk