

# ShoreTel Microsoft Dynamics CRM Integration



Make the most of your most valuable information asset: customer data



## BENEFITS

- *Seamlessly integrates customer data from Microsoft Dynamics CRM with the ShoreTel unified communications system*
- *Can be extensively customized or provide core functionality out-of-the-box*
- *Automatically links calls to existing CRM records to enhance productivity, shorten response times and improve interactions*
- *Facilitates CRM record creation for first-time callers*

## Overview

The ShoreTel® Microsoft Dynamics CRM Integration application brings a new level of customizable, highly personal communication to customer interactions, combining voice capabilities with immediate access to comprehensive customer data. With it, Microsoft Dynamics™ CRM users can have a better understanding of customers' needs each time they talk – enhancing caller satisfaction and agent productivity while reducing call response times and durations.

## Tight integration with Microsoft Dynamics CRM

The ShoreTel Microsoft Dynamics CRM Integration application provides telephone number indexed lookups into the Microsoft Dynamics CRM data store and automatic or user-driven navigation to, and creation of, related CRM records.

As a result, the ShoreTel Integration application allows users to access complete customer information as an inbound or outbound call begins. Based on phone number search results, it can provide screen pop notification, allowing CRM users to navigate to, or create, associated records with a mouse click.

## Support for custom entities

To address the wide range of needs of Microsoft Dynamics CRM users, ShoreTel provides comprehensive out-of-the-box functionality and enables a high level of configurability. The latter allows organizations to extensively customize search settings to allow lookup of both standard and custom CRM entities and attributes. Furthermore, user settings give each user control over exactly how the integration software responds to calls and lookup results.

All together, these ShoreTel capabilities automate routine tasks and increase user productivity, leading to more effective interactions that improve customer satisfaction and loyalty.

## A rich user interface instantly conveys information

The ShoreTel Integration application uses a screen pop notification that allows users to preview found entities before choosing to open a corresponding



Figure 1: ShoreTel's screen pop notification quickly conveys key information about the inbound caller, displaying telephone number search results and options for navigating within the Microsoft Dynamics CRM application.

CRM record. An optional main window may be used to view and perform actions for active calls and associated CRM entities.

## Embedded call control allows users to focus on the customer

ShoreTel's streamlined application interface reduces manual tasks, boosting user productivity and contact quality. For example, with a single mouse click a user can concurrently answer a ringing call and open an associated CRM form, thus bypassing the need to separately operate a telephone handset or speaker button. In addition, the ShoreTel Web Dialer application provides fully integrated click-to-call capabilities.\*

## Special call activity handling capabilities

ShoreTel enables the automatic and manual creation of records tied to CRM entity look-ups, allowing corporate data to be consolidated for better reporting and decision making.

## Seamless integration with existing processes

The ShoreTel Integration application is easy to install and intuitive to use, ensuring a smooth transition into daily business operations. Once installed, the integration is seamless, allowing your company to realize the benefits of integrated IP telephony without changing established procedures, roles or workflows.

\* For outbound click-to call support from CRM Web forms, customers are advised to install the ShoreTel Web Dialer.

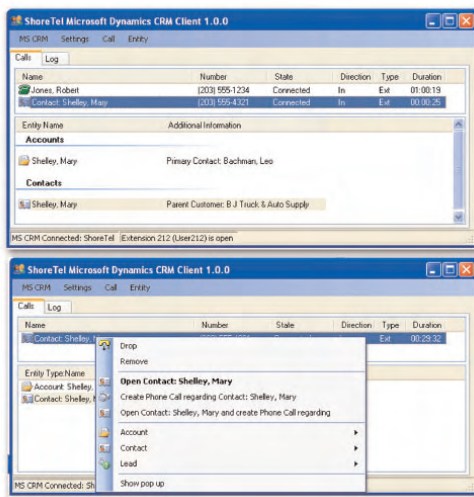


Figure 2: Based on user settings and the results of the search, the user may opt to left click a name from the call list to view the Microsoft Dynamics CRM records for the phone number (top window) and/or right click to display options for taking action (bottom window).

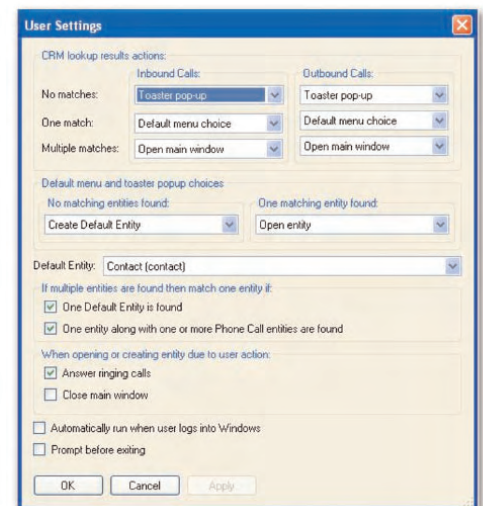
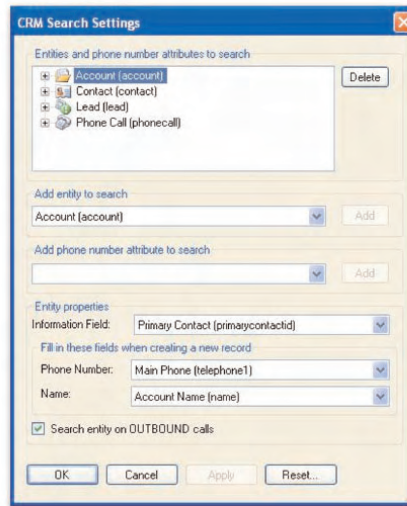


Figure 3: ShoreTel's extensive customization capabilities allow users to create their own search experience (left window) and choose how to view information returned from queries to Microsoft Dynamics CRM (right window).

## REQUIREMENTS

- ShoreTel Version 6.1 or later
- ShoreWare® Call Manager (Personal, Advanced, or Operator) must be installed for the application to function. The Call Manager need not be running.
- Microsoft® Internet Explorer Version 6.0 or later
- A Microsoft Dynamics CRM Version 3.0 or later account. Both Small Business and Professional Editions are supported.



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## Operation

The ShoreTel Microsoft Dynamics CRM Integration application runs on each user's desktop as a resident application in the Windows tray.

The application monitors the user's phone line for inbound and outbound calls which are then tracked and displayed in the client windows.

Based on the information provided with a call, the client will respond in one of three ways:

- Don't perform any CRM actions for the call. In this state, calls are displayed and the user can put them on and off hold or drop them via functions within the Main window. No CRM lookup is performed.
- Use attached ShoreTel call properties specific to Microsoft CRM to create and submit a query to Microsoft CRM based on the values of the call properties.
- Use the phone number of the call to create and submit a query to Microsoft CRM to lookup entities with matching phone numbers.

## Highly Configurable

Based on user settings and the results of the search of the CRM database, the ShoreTel integration software will react in one of the following ways:

- Provide a screen pop notification window from the tray area with several choices appropriate to the results of the query.
- Automatically open the ShoreTel CRM Client Main window.

- Automatically open or create a CRM Entity form and/or a CRM Phone Call form

Even if the client performs no automatic action as a result of the lookup results, the user can open the Main window and from there select a specific CRM activity related to the call.

How a given user configures the application to behave with regard to automatic display of the screen pop notification window and/or Main window and automatic creation of records within Microsoft CRM will depend upon his or her individual preferences and workflow.

## About ShoreTel

ShoreTel is a leading provider of Pure IP unified communications systems. ShoreTel enables companies of any size to seamlessly integrate all communications-voice, data, messaging-with their business processes. Independent of device or location, ShoreTel's distributed software architecture eliminates the traditional costs, complexity and reliability issues typically associated with other solutions. ShoreTel continues to deliver the highest levels of customer satisfaction, ease of use and manageability while driving down the overall total cost of ownership. Founded in 1996, ShoreTel has achieved broad industry recognition for its technology. For more information, visit [www.shoretel.com](http://www.shoretel.com) or call 1-800-425-9385.