

MS Dynamics CRM with SMS Connector

PositiveEdge helps implement Microsoft Dynamics CRM with Live Support Chat to manage organization's Customer Service department across industries.

BUSINESS SITUATION

In many organizations today, field sales executives often work from remote locations away from the local offices, so from their perspective it is very important to have the ability to receive a real-time updates and access the central database for any MSCRM activity.

SOLUTION

An integration of Microsoft Dynamics CRM with SMS connector provides the means for your organization to stay in touch with your field sales force. It allows you send SMS from within Microsoft Dynamics CRM system. This is an all-in-one integrated solution whereby you can stay in touch with your executives and customers.

Below are few of the offerings:

Stay connected with your Sales force

Fields Sales Executives working away from the office can be informed about the weekly /daily schedule of appointments with the prospective clients or customers. A MS CRM user can schedule an appointment in the MS CRM system and notifies the field sales executive via SMS. In return Field Sales Executives can respond via SMS as an outcome of the appointment and that will be archived as meeting updates to a particular meeting in the MSCRM system.

Also, a sales executive can create a lead / qualify a lead / contact / account in the MS CRM system by sending a SMS in prescribed formats. These prescribed formats can be customized and thus act as commands to perform certain actions in MSCRM system.

New channel of communication

With this integration, now your existing customers can send a SMS and raise a service request /case within your MS CRM system. Also, the customers are notified about the status of their service requests / cases from time to time and thus are better engaged.

The SMS messages are archived as activities and are viewable from a contact's (or any other entity with an activity relationship) as storing logs of SMS history.

SMS Campaigns

You can run a quick SMS campaign by targeting a MS CRM Marketing List or specific customer base. It also allows you to track the responses of your SMS campaigns and measure the performance. Besides, you can send promotional messages, billing reminders and can conduct polling/ surveys / contests in an effective way.

BENEFITS

- Quick and easy to implement
- Extend the capability of your Microsoft Dynamics CRM application
- Speed up your ability to contact customers in a way that suits all mobile phone users.
- Allows your customers to have direct access to Support teams
- Reduces Operational Cost



Region: All

Industry: All

Engagement Highlights:

- ✓ Stay connected with your Sales Force
- ✓ Run SMS campaigns
- ✓ Send Promotional Messages

Platform: Microsoft Dynamics CRM 2011

Tools and Technology used

- ✓ Microsoft Dynamics CRM
- ✓ Microsoft .NET framework 4.0
- ✓ Microsoft Visual Studio 2010

Results:

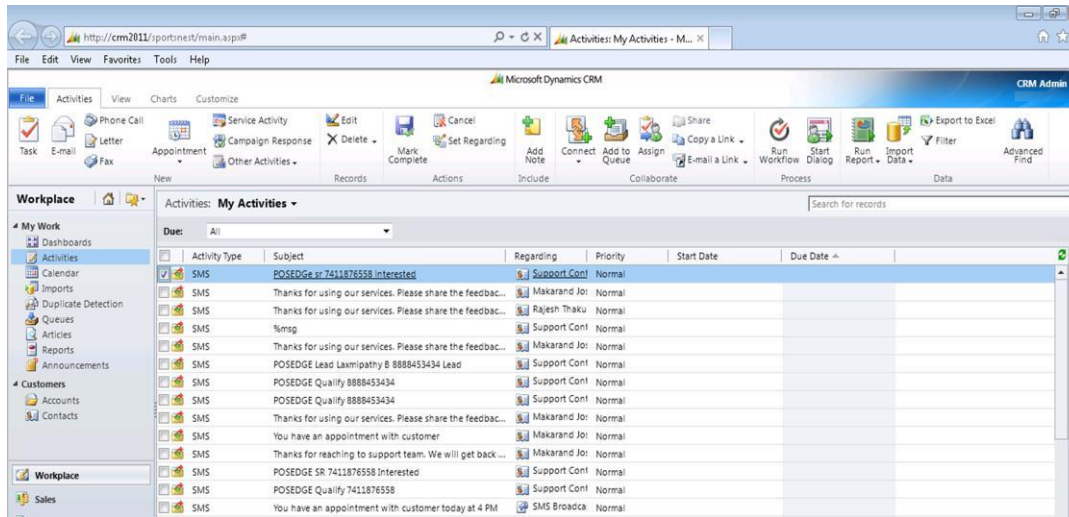
- ✓ Stay in touch with your Field Sales
- ✓ Reminders to customers and field sales force
- ✓ Run SMS Campaigns and Surveys

Clientele:

- ✓ Muthoot Group
- ✓ Fullerton Securities
- ✓ SBI Mutual Fund
- ✓ SportsNest

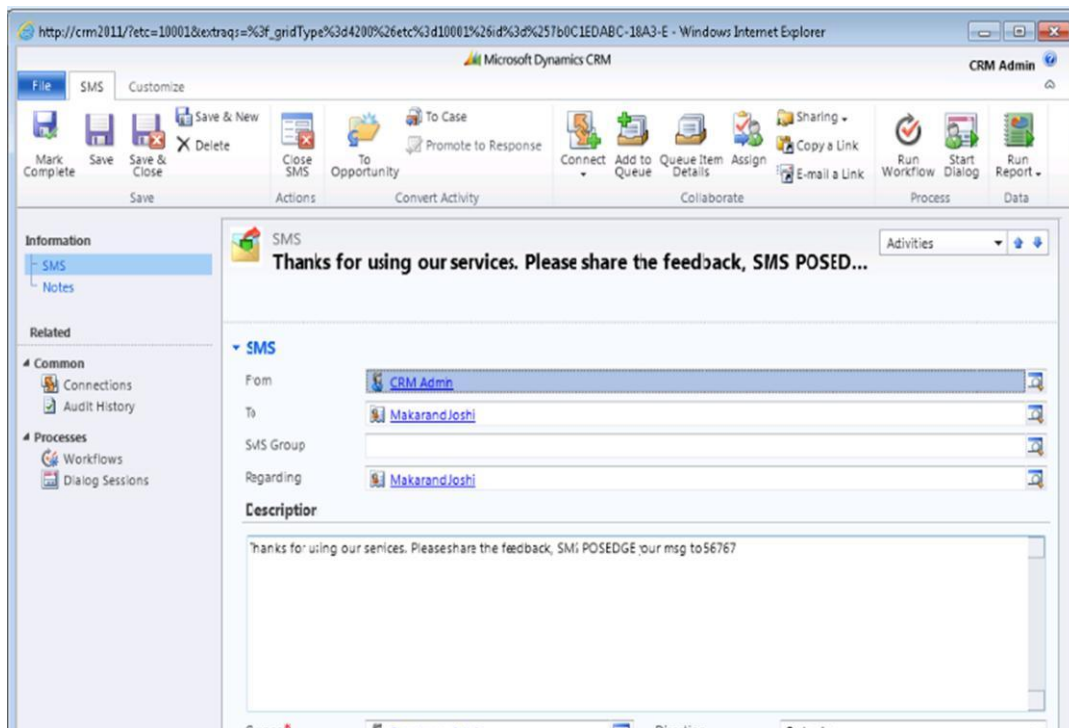
Screen Captures

- SMS Activities archived in MS Dynamics CRM.



Due	Activity Type	Subject	Regarding	Priority	Start Date	Due Date
	SMS	POSEDGE sr 7411876558 Interested	Support Cont	Normal		
	SMS	Thanks for using our services. Please share the feedback...	Makarand Joshi	Normal		
	SMS	Thanks for using our services. Please share the feedback...	Rajesh Thakur	Normal		
	SMS	Thanks for using our services. Please share the feedback...	Support Cont	Normal		
	SMS	Thanks for using our services. Please share the feedback...	Makarand Joshi	Normal		
	SMS	POSEDGE Lead Laxmipathi B 8888453434 Lead	Support Cont	Normal		
	SMS	POSEDGE Quality 8888453434	Support Cont	Normal		
	SMS	POSEDGE Quality 8888453434	Support Cont	Normal		
	SMS	Thanks for using our services. Please share the feedback...	Makarand Joshi	Normal		
	SMS	You have an appointment with customer	Makarand Joshi	Normal		
	SMS	Thanks for reaching to support team. We will get back...	Makarand Joshi	Normal		
	SMS	POSEDGE SR 7411876558 Interested	Support Cont	Normal		
	SMS	POSEDGE Quality 7411876558	Support Cont	Normal		
	SMS	You have an appointment with customer today at 4 PM	SMS Broadca	Normal		

- Conversation History attached to a CRM contact



Microsoft Dynamics CRM

SMS

Thanks for using our services. Please share the feedback, SMS POSED...

Activities

From: CRM Admin

To: Makarand Joshi

SMS Group:

Regarding: Makarand Joshi

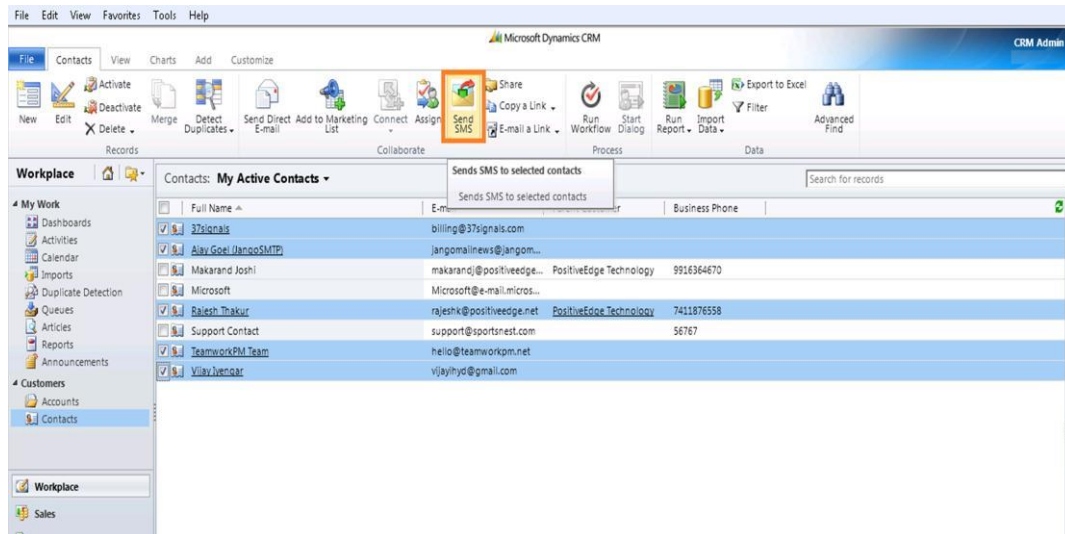
Description:

Thanks for using our services. Please share the feedback, SMS POSEDGE your msg to 56767

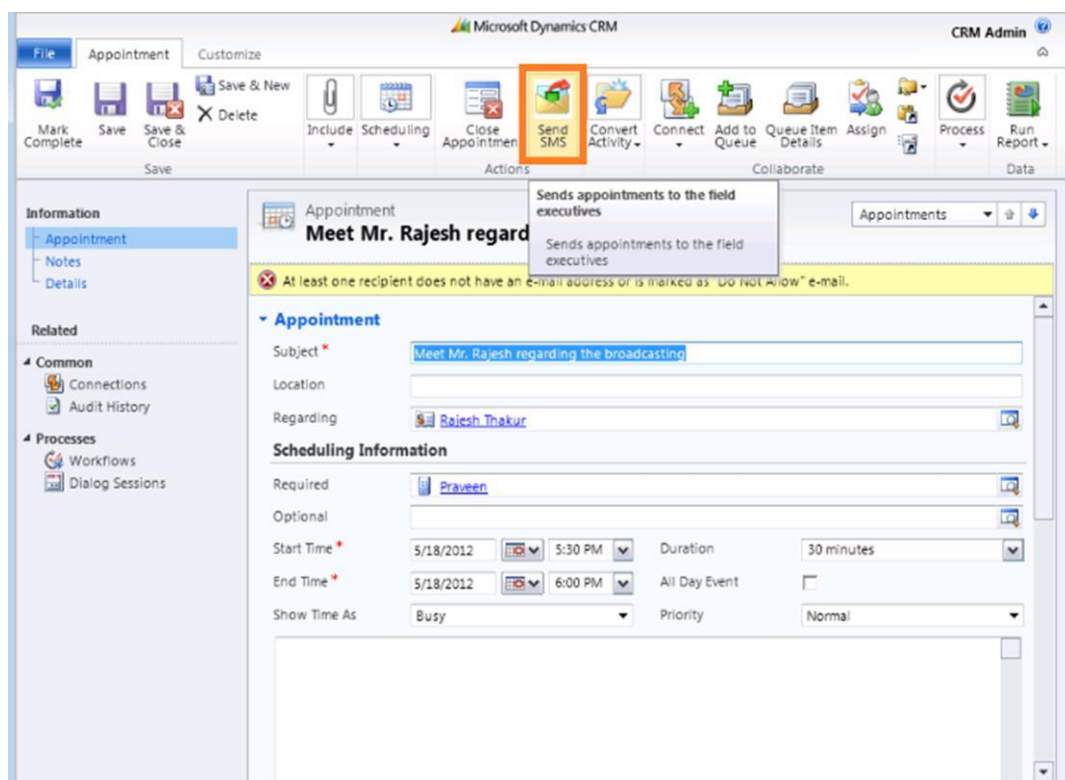


Screen Captures

- Quickly run a SMS campaign for your targeted customers.



- Schedule an appointment of a customer with the field sales executive and notify him /her via SMS.





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For more information about how to discover diamonds in the crevasses between your core systems or to learn more about how PositiveEdge can help, visit www.positiveedge.net or email pprahlad@positiveedgesolutions.com

