



OMNICHANNEL CONTACT CENTER OVER MICROSOFT DYNAMICS 365

AGENT FUNCTIONALITIES

☎ +5255 4170-8422
+1 305 644 5535
+506 4000- 4000
✉ sales@callmyway.com
🌐 www.callmyway.com



October, 2021

Content

Introduction	3
IsMyContact benefits.....	8
Access to IsMyContact.....	9
IsMyContact main features.....	10
Access to call history	10
Pause Control:.....	11
Integration with CRMs	12
Integration with Microsoft Dynamics 365:.....	12
Create / Search contacts in IsMyContact - Dynamics	14
Flexible architecture.....	19
Omni-Channel Environment.....	23
Contact Management.....	23
Daily Self-Assessment	25
Call History	26
Pause Control.....	27
Conclusion	28
Contact Us.....	29

Introduction

Customer Service Centers, Collection Management Centers, Tele-Sales Units, Online Technical Support Centers, among others, require clear and dynamic tools and processes to increase their productivity and ensure the maximum service and service experience. .



In addition, the new trend is to provide agents with a remote work environment, from their home or wherever they are, equivalent to traditional offices. The supervisors and heads of these work centers will be able to enjoy interfaces or dashboards with metrics that allow them to remotely manage their work teams in real time.



In order to achieve both objectives, IsMyContact, facilitates an Omnichannel Contact Center platform on Microsoft Dynamics 365. In this way, the agent only has to access a single online

CallMyWay® and their logos are trademarks owned by CallMyWay NYSA All rights reserved.

www.callmyway.com | sales@callmyway.com

+506 4000-4000 | +5255 4170-8422 | +1 305 644 5535

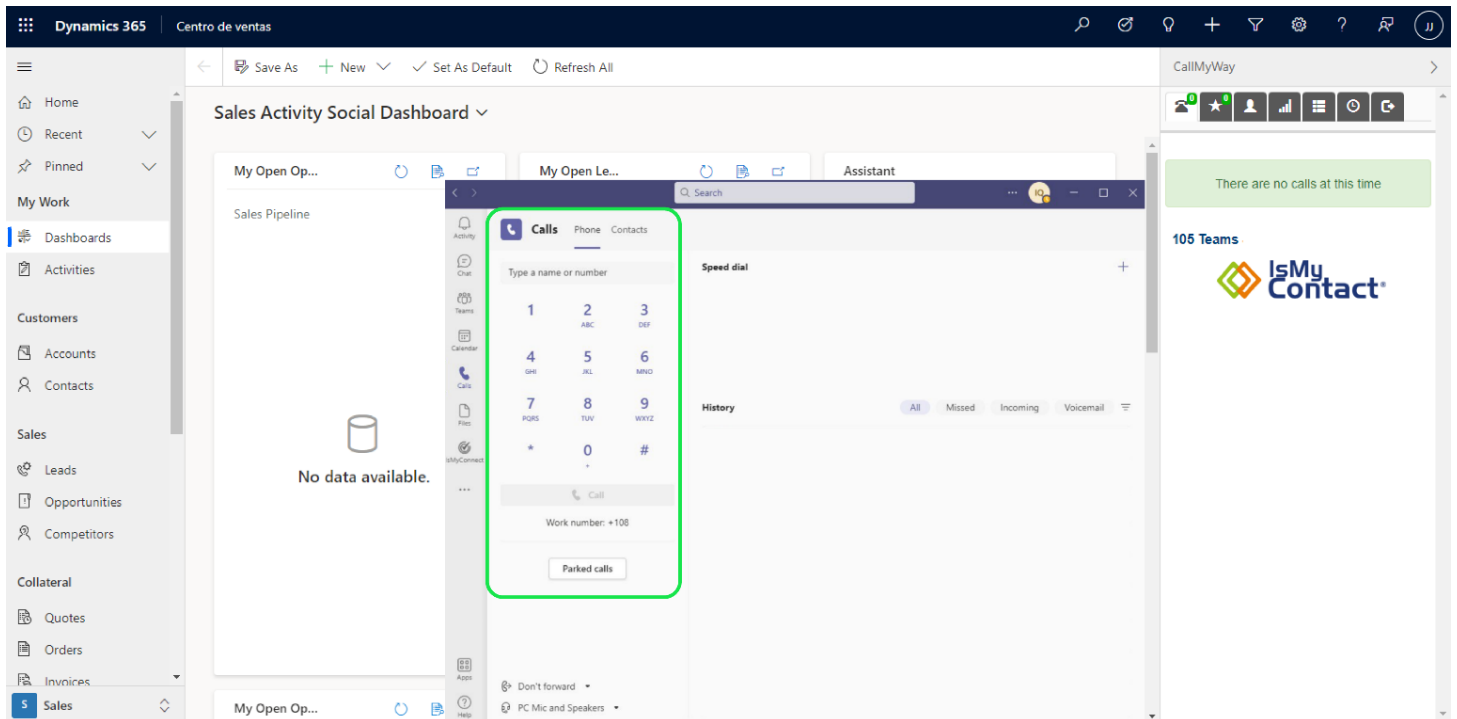
interface, IsMyContact, which provides all the integrated resources to attend: calls, WhatsApps, and at the same time document the interaction in the client.



IsMyContact's Omni-channel environment is dynamic and will gradually incorporate new service channels to the platform under the same philosophy, including social networks among others.



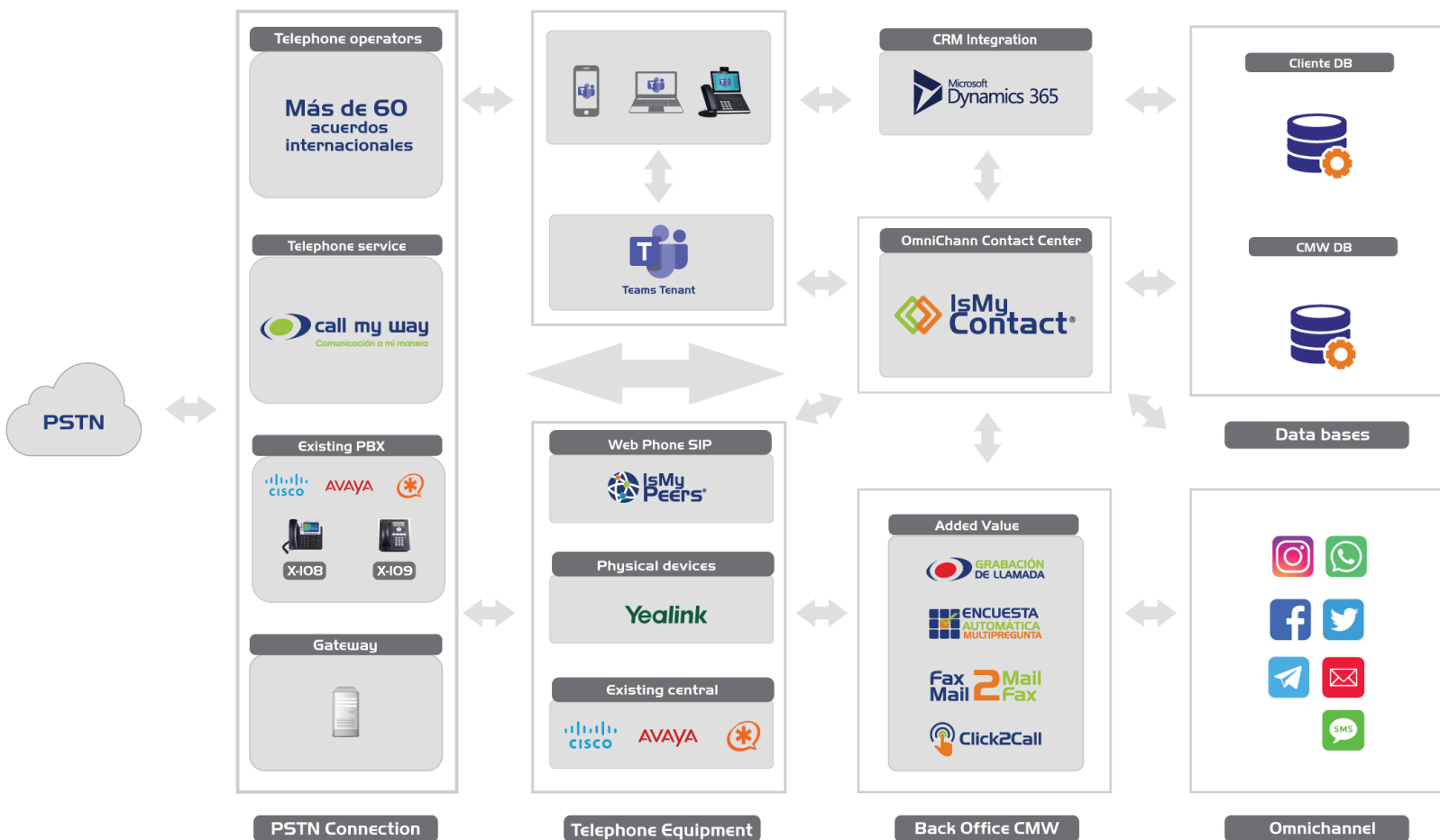
IsMyContact is offered on Microsoft Dynamics 365. In this way, the end customer obtains added value on their Office 365 licensing, by incorporating not only telephony but also their Customer Service Centers on Microsoft Dynamics 365.



CallMyWay® and their logos are trademarks owned by CallMyWay NYSA All rights reserved.

www.callmyway.com | sales@callmyway.com
+506 4000-4000 | +5255 4170-8422 | +1 305 644 5535

The architecture of the service, IsMyContact, allows, if the customer so requires, to maintain their current telephone number or to acquire a new telephone number from CallMyWay in the countries that are available. CallMyWay has agreements in more than 60 countries worldwide in order to offer either portability (countries where it is active) or local numbering. In case portability is not available in a country, it is possible to preserve numbering by incorporating gateways or mediators.



CallMyWay® and their logos are trademarks owned by CallMyWay NYSA All rights reserved.

www.callmyway.com | sales@callmyway.com

+506 4000-4000 | +5255 4170-8422 | +1 305 644 5535

As seen in this architecture, the experience of IsMyContact users can be enriched by adding value-added services provided by CallMyWay, according to the preferences of each company, below, we list the Value Added services available:

1. **Call recording:** It allows you to record, filter, search, listen and score calls for quality control purposes.
2. **Click2Call:** Call button on the Website, which allows your customers to call you by means of a simple click on your website, calls are redirected to the required number.
3. **Fax2Mail:** Allows you to integrate fax services to email.

IsMyContact has open interfaces for its integration with Microsoft Dynamics 365, thus protecting the previous investment that the client would have made and the corresponding training for its agents on said functionalities. Today the interface with: Microsoft Dynamics and Salesforce is available. Future integrations will be published on the website: www.ismycontact.com



CallMyWay® and their logos are trademarks owned by CallMyWay NYSA All rights reserved.

www.callmyway.com | sales@callmyway.com

+506 4000-4000 | +5255 4170-8422 | +1 305 644 5535

IsMyContact benefits

The main benefits of IsMyContact from an agent point of view are:



a. *Comprehensive Contact Center platform. (*) This directly increases agent productivity by interacting with a single work interface for management.*



b. *Omni-Channel Environment: Telephony, Whats App and future others. This allows the agent to have on hand the information on previous care provided to a client or contact through any of the channels, since this information is consolidated in a single site.*



c. *Efficient and agile searches of contacts. This allows the agent to treat his clients and contacts in a personalized way since all the information on the name and transactions carried out with said contact is at hand.*



d. *The agent has Statistics for his self-evaluation. This allows the agent to know at all times if they have significant challenges to meet their work goals, since they will visibly have their pending work.*



e. *Creation and management of records in real time. This allows agents to provide an efficient response time to internal and external customers by documenting the care they are providing live using the forms of Microsoft Dynamics 365.*

(*) Please refer to www.ismycontact.com, site where the CRMs supported by IsMyContact are listed.

Access to IsMyContact

To access IsMyContact, agents must enter the CallMyWay website: www.callmyway.com. Subsequently, they should go to the Account / IsMyContact section.

This is shown in the following images.

The screenshot displays the CallMyWay website interface. At the top, the logo "call my way" is visible with the tagline "Comunicación a mi manera". To the right of the logo is a login form with fields for "User" and "Password", and a "Login" button. Below the login form are links for "New Account" and "Recover Password".

Below the header is a navigation bar with the following links: Home, Account, Balance, Support, CRM, Messages, My Conference, Recordings, Logout, and a language selector (English flag).

The "Account" link is highlighted, and a dropdown menu is open, showing the following options: Access numbers, Always in Costa Rica, My account, Web Phone, and IsMyContact. The "IsMyContact" option is selected.

The main content area displays the user's account information:

Name	CallMyWay CallMyWay
Corporation	CallMyWay NY
Mail 1	iprada@callmyway.com
Mail 2	
Mail 3	
Mail 4	
Phone	40004000
Address	Frente al Colegio de Abogados y Abogadas de Costa Rica, Barrio Los Abogados, Zapote..
City	San Jose
Country	Costa Rica
Account default caller-id	40004000
Times used	1053616
First used	26-11-2010 08:18:31
Last used	21-10-2021 16:51:57

CallMyWay® and their logos are trademarks owned by CallMyWay NYSA All rights reserved.

www.callmyway.com | sales@callmyway.com
+506 4000-4000 | +5255 4170-8422 | +1 305 644 5535

IsMyContact main features

Access to call history

The agent will have access to all the history of both incoming and outgoing calls, as well as the date and time the call was made. IsMyContact allows you to redial the number you want with a single click.

call my way
Comunicación a mi manera

Home Account Balance Support CRM Messages My Conference Recordings Logout

Call History

< 1/6 >

21-10-2021 16:01:39 (442s) (Incoming) 12 → 39
21-10-2021 12:50:36 (74s) (Outgoing) 40004000 → 077
21-10-2021 12:47:33 (122s) (Outgoing) 40004000 → 077
21-10-2021 12:44:37 (75s) (Outgoing) 40004000 → 077
21-10-2021 12:10:56 (613s) (Outgoing) 39 → 20
21-10-2021 12:10:36 (0s) (Incoming) 20 → 39
21-10-2021 11:12:37 (23s) (Incoming) 46 → 39
21-10-2021 10:31:57 (1s) (Outgoing) 40004000 → 077
21-10-2021 10:27:29 (2s) (Outgoing) 40004000 → 077
21-10-2021 10:23:26 (3s) (Outgoing) 40004000 → 077

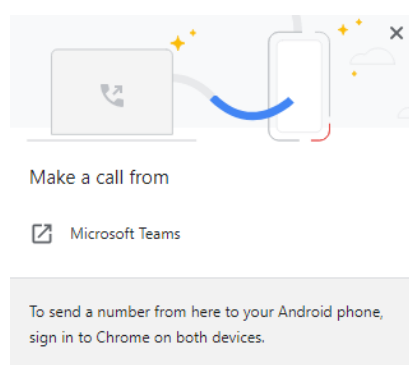
IsMyContact

CallMyWay® and their logos are trademarks owned by CallMyWay NYSA All rights reserved.

www.callmyway.com | sales@callmyway.com

+506 4000-4000 | +5255 4170-8422 | +1 305 644 5535

Once you have pressed the number you want to call, a pop-up window will appear to call via Teams. The format of this popup will depend on the browser you are using, an example is shown below.



Pause Control:

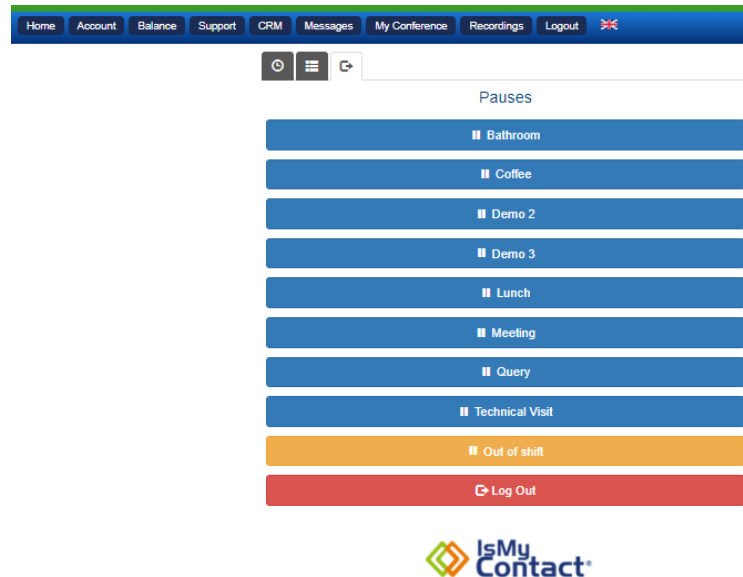
Every IsMyContact agent requires taking breaks, either to attend to their rest periods or to carry out other tasks in the company. Therefore, when taking a pause, it is of great value to identify what kind of pause you are going to take.

During the pause period, no calls will be made to that agent. In this way, the flow of incoming calls is optimized, since these calls will be assigned to the available agents, thus ensuring an adequate response time.

The breaks can be customized in terms of:

- **Label:**Pause type. For example: Lunch, Reports, among other options.
- **Weather:**defines how long the pause is allowed to extend. In this case, if the agent extends this time, a notification will be generated to the supervisor.

The following shows how the various Pauses are displayed by the agent in IsMyContact.



Integration with CRMs

IsMyContact is characterized by being an open Contact Center system and therefore its integration with various CRMs recognized in the industry is facilitated.

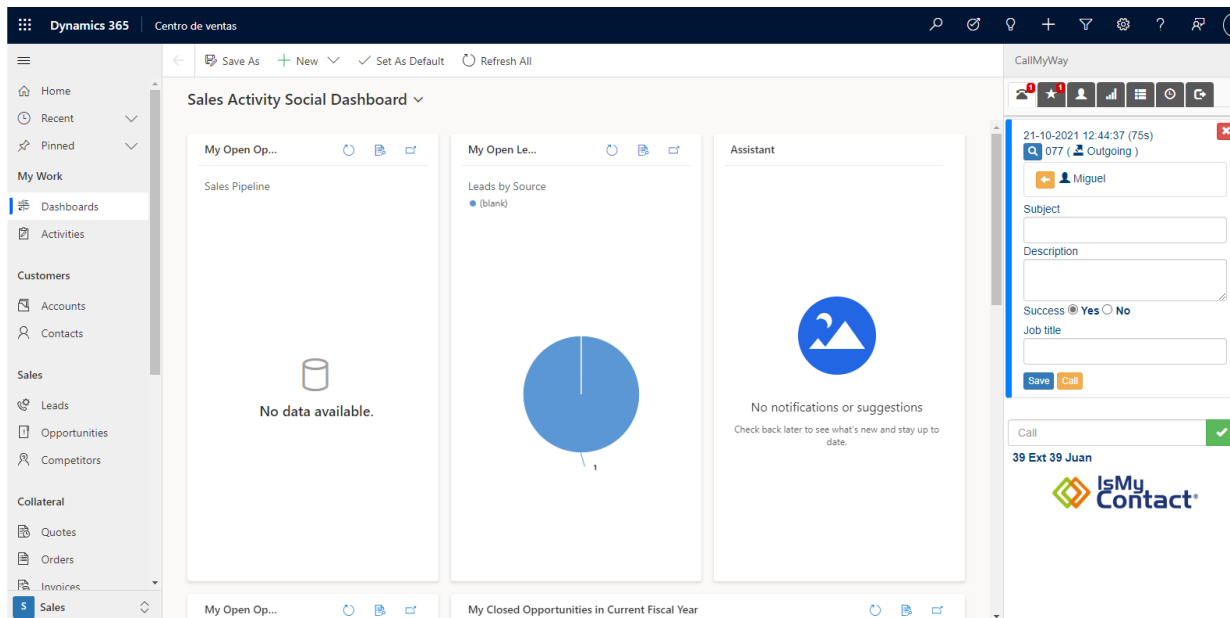
This document describes and shows the IsMyContact interface with Microsoft Dynamics 365 integration for reference. The Behavior of IsMyContact is practically identical with other CRMs, what varies is that in some it is encouraged that all the functionalities are worked directly from IsMyContact and not from the CRM as it happens with Microsoft Dynamics 365.

Integration with Microsoft Dynamics 365:

Microsoft Dynamics is a leading CRM in the industry, by integrating with IsMyContact, the agent will have the advantage of enjoying a single interface to attend tickets and cases and manage their calls.

Once a call comes in, the contact data is immediately displayed, this allows the agent to identify in real time the data associated with the person and company with whom they are going to talk.

This integration is shown in the following image:



In addition, it offers the facility to search all the information about a contact with one click, without the need to go to the Microsoft Dynamics contact panel through a general list.

Next, it is shown, how simple and direct it is the process of finding contact information in IsMyContact integrated into Microsoft Dynamics. Since, when entering the name of the contact, the detail of the information of said contact is displayed immediately in the Microsoft Dynamics panel, thanks to the corresponding integration. This is very useful to have personalized information about the person with whom you are talking.

Create / Search contacts in IsMyContact - Dynamics

1. User Creation

When entering a call, it is possible that the contact does not exist within Dynamics, therefore, the form will show blank the fields related to who is calling. From this same form it is possible to create the record. The steps below:

1. Press on the magnifying glass

The screenshot shows the CallMyWay mobile application interface. At the top, there is a header bar with the text "CallMyWay" and a right arrow. Below the header is a navigation bar with several icons: a phone icon with a red notification badge, a star icon with a red notification badge, a person icon, a bar chart icon, a list icon, a clock icon, and a share icon. The main content area displays a call log entry for "21-10-2021 12:44:37 (75s)" with a red close button. Below the call log entry is a search bar with a magnifying glass icon and the text "077 (Outgoing)". Below the search bar is a form for creating a contact, with fields for "Subject", "Description", "Success" (radio buttons for Yes and No), and "Job title". At the bottom of the form are two buttons: "Save" and "Call".

CallMyWay® and their logos are trademarks owned by CallMyWay NYSA All rights reserved.

www.callmyway.com | sales@callmyway.com

+506 4000-4000 | +5255 4170-8422 | +1 305 644 5535

2. Click on the "+" icon. Select what kind of record is going to be created, that is, if it is of the Contact or Lead type. Then they only have to enter the basic information required for the creation of said record. And select the Save option.



The screenshot shows a web interface for creating a new record. At the top left, there is a search icon (magnifying glass) and a '+' icon, which is highlighted with a red square. Below these icons are two radio buttons: 'Contact' (selected) and 'Lead'. The form contains four input fields: 'Name' with the value 'CallMyWay', 'Last Name' with the value 'S.A', 'Phone' with the value '40004000', and 'Email' with the value 'info@callmyway.com'. A blue 'Save' button is located below the email field. At the bottom right, there is a red 'Close' button.

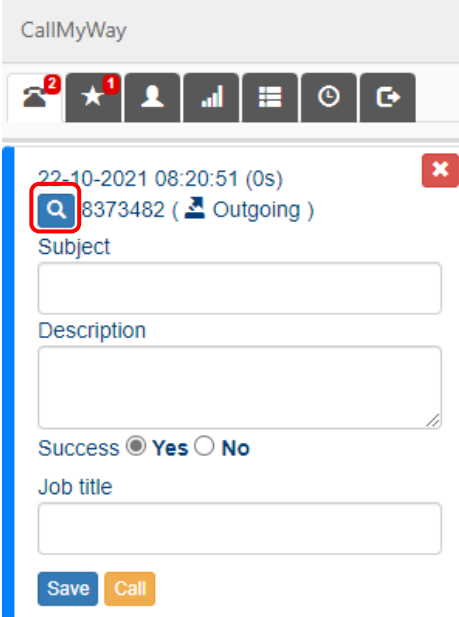
2. Contact search.

2.1. From a call

When entering a call, it is possible that the contact will not be shown immediately in the form and it will only show blank the fields related to who is calling. This could occur when two or more contacts have been registered with the same phone number, or in case the number has the private identifier.

From this same form it is possible to search the record of the person with whom you are talking. The steps below:


Press on the magnifying glass




The screenshot shows the CallMyWay mobile application interface. At the top, there is a header bar with the text "CallMyWay" and a right arrow. Below the header is a navigation bar with several icons: a person icon with a red "2" badge, a star icon with a red "1" badge, a person icon, a bar chart icon, a list icon, a clock icon, and a share icon. The main content area displays a call log entry for "22-10-2021 08:20:51 (0s)" with a red "X" icon in the top right corner. Below the timestamp, there is a magnifying glass icon inside a blue square, which is highlighted with a red rectangle. To the right of the magnifying glass icon is the text "8373482 (Outgoing)". Below this, there are several input fields: "Subject", "Description", "Success" (with radio buttons for "Yes" and "No"), and "Job title". At the bottom of the form, there are two buttons: "Save" and "Call".


By doing this, a window will be shown to us that will automatically show us the records that match the number that has called us, we just have to select the corresponding record.


In case of being a private identifier, we can search records by values such as: name, surname, or telephone number.







34










Tamer Salah










Kim Abercrombie










Heiner R







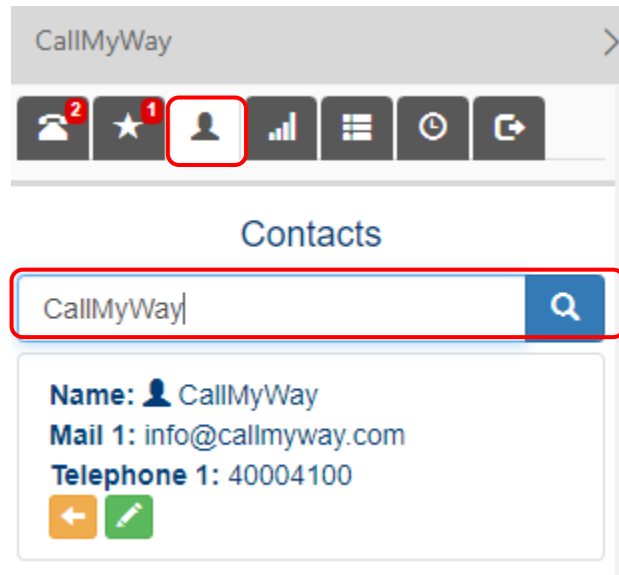
Ofer Daliot



Close

2.2.Handbook

From the IsMyContact menu select the Contact icon, and enter any of the valid criteria to perform a search: name, surname or telephone number.



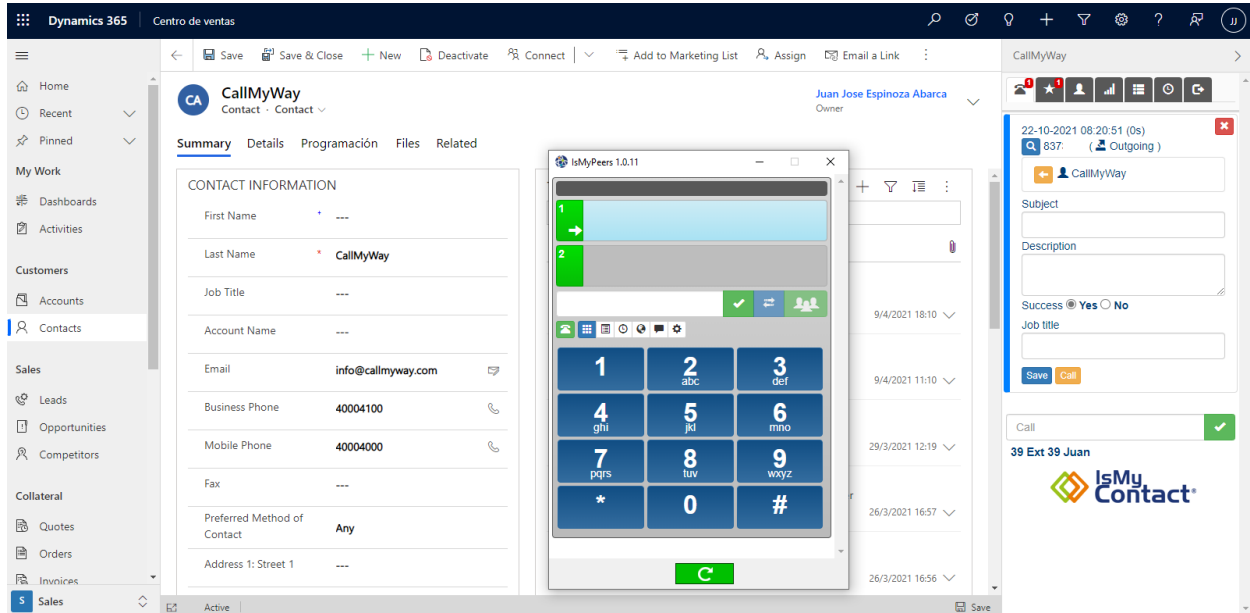
Flexible architecture

The IsMyContact architecture adds value directly to customers' Office 365 licensing. This is because Contact Center telephony is available on Microsoft Teams, as shown in the previous sections.

In this way, the telephony is established on the Microsoft Teams licenses of the companies. For this, the client needs to acquire a complementary license from Microsoft called Phone System (for Office 365 Business, E1 or E3) or have an E5 license. The detail is shown in the following sheet.



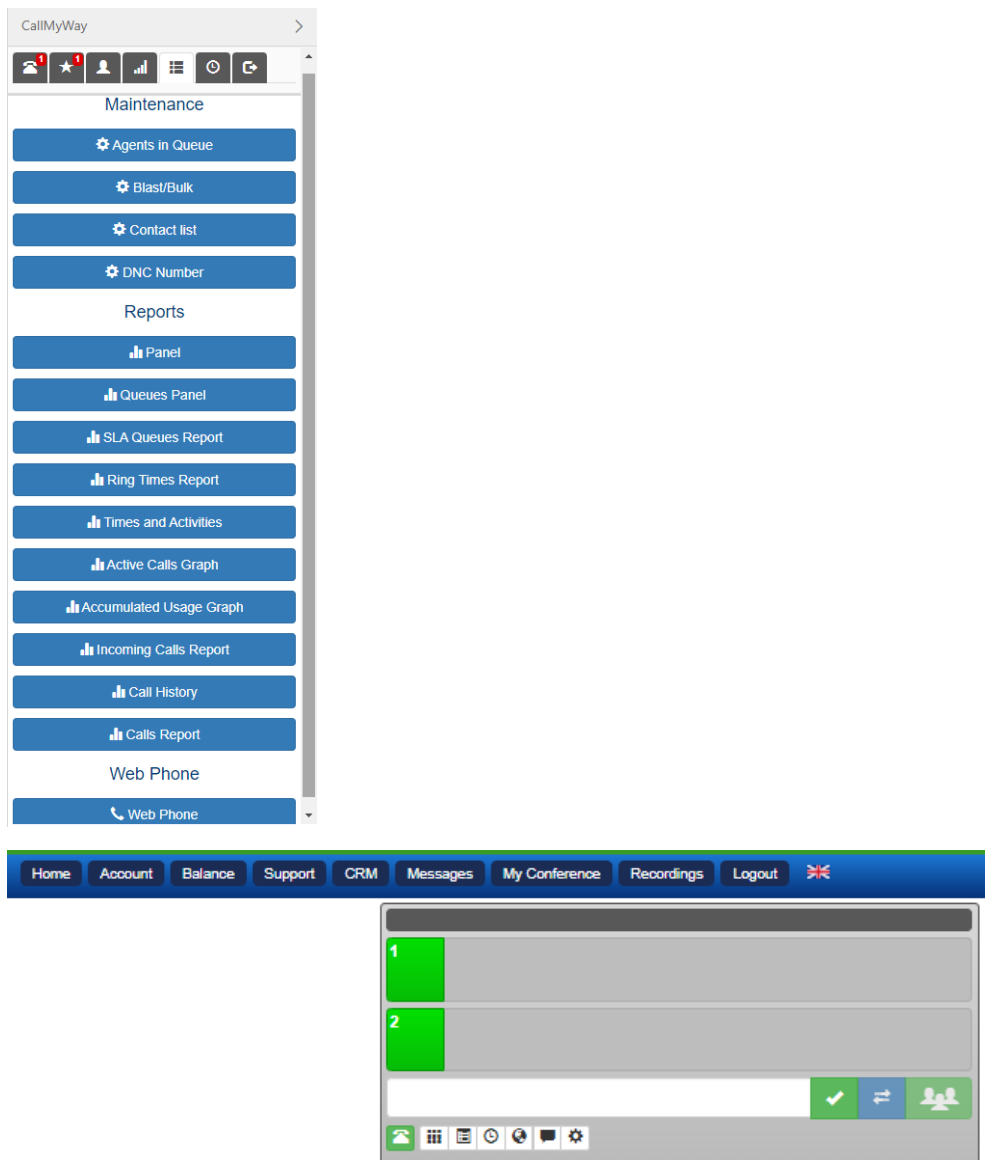
In order to provide flexibility, the IsMyContact architecture also allows the integration of some users through SIP telephony, for this, IsMyContact integrates a Web Phone in the agent interface, as shown below, with images that refer to the experience from the agent using the Web Phone.



CallMyWay® and their logos are trademarks owned by CallMyWay NYSA All rights reserved.

www.callmyway.com | sales@callmyway.com

+506 4000-4000 | +5255 4170-8422 | +1 305 644 5535



When the agent uses the Web Phone, the agent can create and edit phone records in the spaces indicated above. Always remember to save the data.

CallMyWay

1

1

22-10-2021 08:20:51 (0s)

8373482 (

Outgoing

)

CallMyWay

Subject

Description

Success ☒ Yes ☐ No

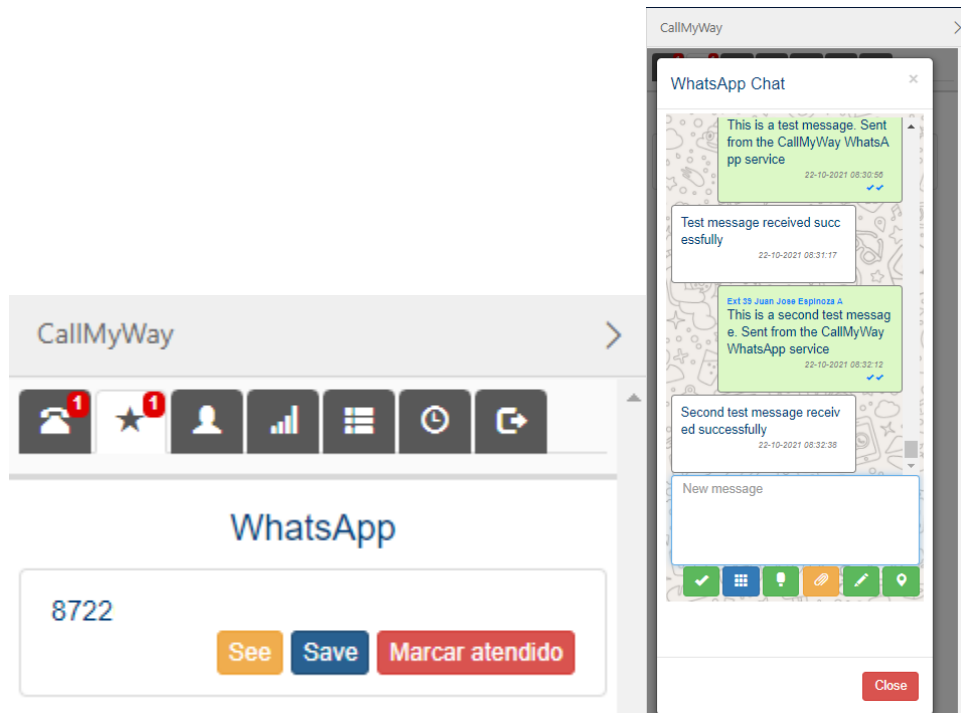
Job title

Save

Call

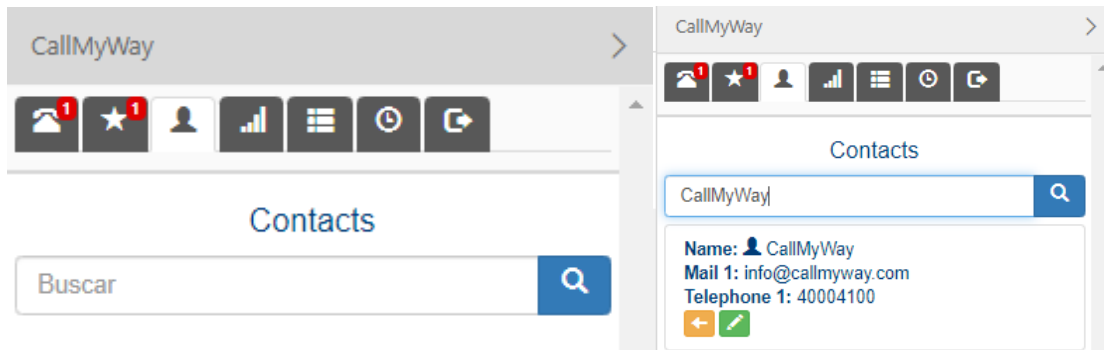
Omni-Channel Environment

IsMyContact is a platform designed for an Omni-Channel environment, which includes, in addition to Telephony, service channels such as Whats App and in the future others such as: Telegram, Facebook, Twitter and Instagram. As an example, we show the interface for Whats App, where the agent easily identifies that he is entering a message in order to attend it in a timely manner.



Contact Management

An agent can search or edit a contact, using the third tab offered by IsMyContact or within the Microsoft Dynamics contact panel. This functionality is shown below.



This represents an operational agility benefit for IsMyContact agents, since it allows you to create the registry of new leads, without having to fill out long forms. Here's how this vital functionality is achieved.

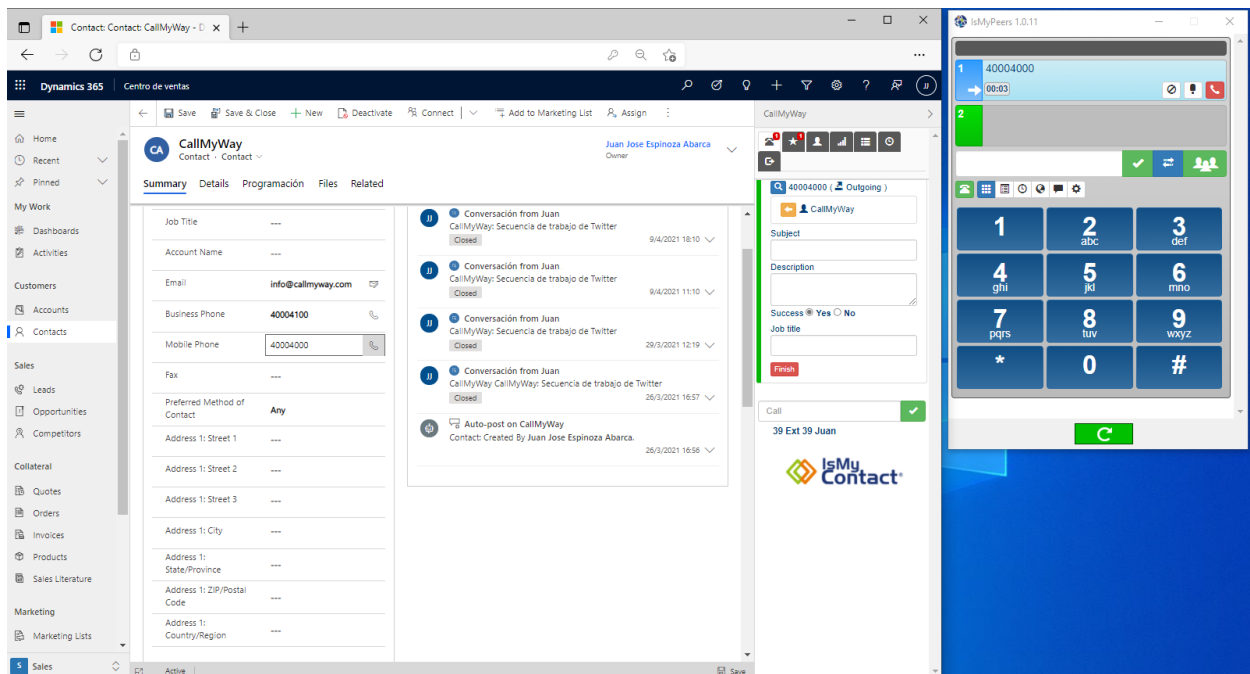
Once you have located the contact you want to call, in the central panel, you can generate the call with a single click.

IsMyContact will automatically generate the call through the Web Phone. This is shown in the following images.

CallMyWay® and their logos are trademarks owned by CallMyWay NYSA All rights reserved.

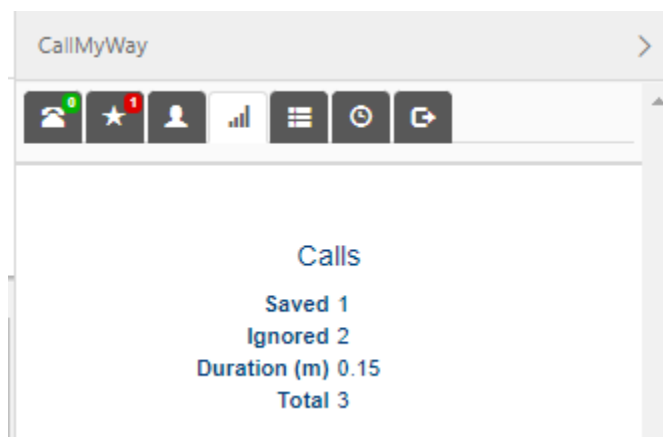
www.callmyway.com | sales@callmyway.com

+506 4000-4000 | +5255 4170-8422 | +1 305 644 5535



Daily Self-Assessment

One of the benefits that IsMyContact offers to agents is the possibility of conducting a self-assessment of their daily management. This is accomplished through the day's statistics functionality shown in the following image. This allows you to act proactively to improve your metrics.



CallMyWay® and their logos are trademarks owned by CallMyWay NYSA All rights reserved.

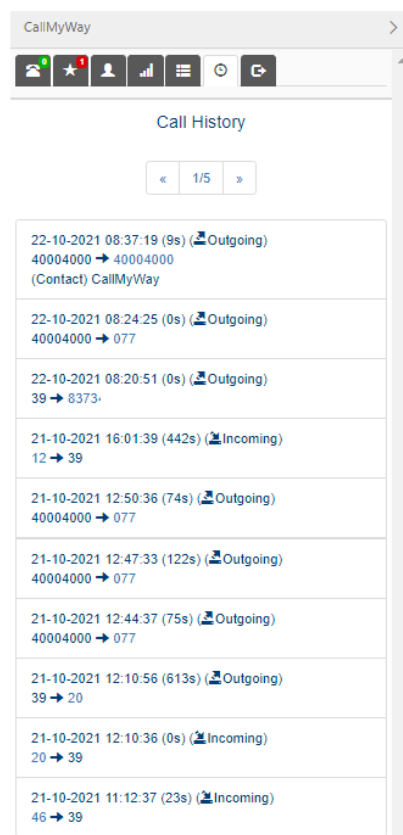
www.callmyway.com | sales@callmyway.com

+506 4000-4000 | +5255 4170-8422 | +1 305 644 5535

Call History

The agent has an interesting tool to increase his productivity, since he has at hand the history of the calls he has made during the day. In case you want to redial one of the numbers you have dialed during the day, you can do it directly from said panel, which greatly speeds up your internal procedures and processes.

This functionality is described in the next screen.

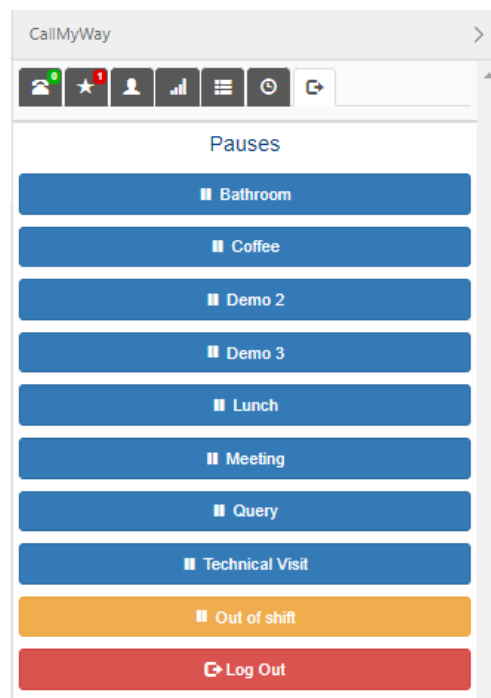


Call History	
« 1/5 »	
22-10-2021 08:37:19 (9s) (📞 Outgoing)	40004000 → 40004000 (Contact) CallMyWay
22-10-2021 08:24:25 (0s) (📞 Outgoing)	40004000 → 077
22-10-2021 08:20:51 (0s) (📞 Outgoing)	39 → 8373
21-10-2021 16:01:39 (442s) (📞 Incoming)	12 → 39
21-10-2021 12:50:36 (74s) (📞 Outgoing)	40004000 → 077
21-10-2021 12:47:33 (122s) (📞 Outgoing)	40004000 → 077
21-10-2021 12:44:37 (75s) (📞 Outgoing)	40004000 → 077
21-10-2021 12:10:56 (613s) (📞 Outgoing)	39 → 20
21-10-2021 12:10:36 (0s) (📞 Incoming)	20 → 39
21-10-2021 11:12:37 (23s) (📞 Incoming)	46 → 39

Pause Control

From IsMyContact the Agent has the facility to go into Pause. When placed in this mode, no calls will come in and therefore you can devote yourself to other responsibilities or take a break. The Pauses are configured according to the preferences of each company, in this way, the agent selects the Pause that best applies. For his part, the supervisor has access to a report of agents in Pause, and can easily identify the availability of agents.

Here is an example of pauses configured for agents to select.



Conclusion

Through IsMyContact, the agent has all the tools at hand to manage their clients and contacts in an Omni-Channel environment and through a friendly platform.

For the agent, it is very easy to locate the information required to give a personalized service, and to report their work status as active or on Pause.

The integration of IsMyContact with Microsoft Dynamics 365 generates a direct benefit of streamlining the operation of the Customer Service Center, since the agent only needs to interact with a single platform.

As it is a service developed by the CallMyWay Innovation and Development team, it is always easy to customize the service according to the specific parameters and requirements of each client. Therefore, an update of this and future documents will be published in order to reflect the new functionalities or services available.

Contact Us

CENTRO DE SERVICIO AL CLIENTE.

ventas@callmyway.com
www.callmyway.com



México +5255 4170 8422

Chile +56 227609072

Colombia +57 15189663

Miami +1-305-644-5335

Canadá +1 6134168671

Perú +51 16409850

Panamá +507 8366060

Guatemala + 502 (2) 3750299

El Salvador +503 (211) 30412

Costa Rica +506 40004000

Rep. Dominicana +1 (829) 9466346

CallMyWay® and their logos are trademarks owned by CallMyWay NYSA All rights reserved.

www.callmyway.com | sales@callmyway.com

+506 4000-4000 | +5255 4170-8422 | +1 305 644 5535