

Microsoft Dynamics Plugin FAQs

1. What is the Microsoft Dynamics plugin?

The Microsoft Dynamics plugin for the Vonage Business Desktop allows you to link your Microsoft Dynamics account to your Vonage extension(s).

The Desktop will search your Microsoft Dynamics account for the caller ID name and phone number associated with your inbound and outbound calls.

You can use your call information to create new leads or contacts as well as track your calls with activities and notes.

2. How can I get the Microsoft Dynamics plugin?

To use the Microsoft Dynamics plugin, you must first have the Desktop installed. If you do not already have the program installed, visit <http://www.vonagebusiness.com/desktop> to download and install the application.

NOTE: You must have Microsoft Silverlight installed in order to run the Desktop, which can be downloaded from the same page referenced above.

Once you have installed the Desktop application, contact Vonage's Customer Care Team and request to have the Microsoft Dynamics plugin added for your extension(s).

After the plugin has been added, navigate to the "Plugins" page of the Desktop. You will see a "Plugins" button in the upper, right-hand corner of the application screen. Find the Microsoft Dynamics plugin from the list, and then click "Install." The Desktop will then download and install the plugin.

3. How much does the Microsoft Dynamics plugin cost?

The plugin is \$2.99 per month, per extension.

NOTE: Pricing is allocated per extension, not per MS Dynamics user.

4. What version of Microsoft Dynamics do I need to run this plugin?

Compatible server versions include: Microsoft Hosted 2011 Online, Microsoft 4.0 Local, and Microsoft Online-Custom Provider.

5. How do I link my Microsoft Dynamics account with the plugin?

After the plugin has been installed, on the “Plugins” page, click “Edit Settings” next to the Microsoft Dynamics plugin.

Enter your Server Version, Server Root URL (only applicable if you are using a custom provider), Organization Name, Username and Password that you use to login to Microsoft Dynamics.

Click “Test Connection” to confirm your credentials are correct.

When the test relays a “Success!” message you are connected.

Finally, click “Apply” and the Desktop will be linked to your Microsoft Dynamics account.

6. How do I remove the Microsoft Dynamics plugin?

To remove the Microsoft Dynamics plugin, navigate to your “Plugins” page by clicking the button in the upper, right-hand corner of the Desktop application.

Find the plugin, and click the “Uninstall” button. The Desktop will remove the plugin.

Like any other Vonage service, you must contact Vonage’s Customer Care Team to remove the Microsoft Dynamics plugin from your service plan in order to avoid being charged again for the service.

7. The Microsoft Dynamic plugin is minimized on my Desktop “Call Details” page. How do I make it the default plugin?

To make the Microsoft Dynamics plugin the default Desktop plugin, navigate to the “Plugins” page by clicking the button in the upper, right-hand corner of the page.

Find the plugin and check the box labeled “Default Plugin” (display in center area for new calls).

Now the Microsoft Dynamics plugin will always display full information on your “Call Details” page.

8. I just got a call from someone new, and I would like to create a Microsoft Dynamics contact for him. How do I do this?

When you receive a call on your Vonage extension, the Microsoft Dynamics plugin will search your account for the caller ID and phone number.

If nothing is found, click the “Create New Contact” link found on the plugin view for that call.

NOTE: You can also add new leads and new accounts.

Clicking the link will take you to the Microsoft Dynamics page through your default browser. From here, you can enter in all the necessary information for your new contact and save.

9. I’m having an important call with a customer later, and I want to use the Microsoft Dynamic plugin to take notes. How do I do this?

Whether it is inbound or outbound, the call will appear on your Desktop screen.

If the call is with an existing contact, you will see a section on the Microsoft Dynamics plugin view that allows you to “Add Activity.” From here, you can type in a subject for your call as well as notes.

When you are finished, just click “Save.”

When you need to check your notes later, simply open up your Microsoft Dynamics account in a web browser, search for the contact, and you will see the linked activity.

10. One of my contacts just called me, and she has a new phone number. Can I associate this new number with her existing Microsoft Dynamics contact?

Yes! From the Desktop screen, in the Microsoft Dynamics plugin view, simply type in the contact’s name in the search bar and click “Search.”

Once you find the correct contact, you will see an orange dialogue box that asks you if you would like to add the new number to this contact.

Choose the type of number from the drop-down and click “Add.”