

TeamViewer Integration with Microsoft Dynamics 365

TeamViewer Integration with MS Dynamics 365 enables customer support agents and sales representatives to remotely connect with customers and take control of their devices without leaving the Microsoft Dynamics 365 environment.



Help Customer Support Agents and Sales Representatives Do More with Embedded Remote Support

The ability to address customer issues as quickly and efficiently as possible makes customer support agents and sales representatives more effective and improves customer satisfaction. Microsoft Dynamics 365 helps break down data silos by unifying your CRM and ERP capabilities. By integrating TeamViewer, you immediately enhance your Microsoft Dynamics 365 and CRM consoles with embedded remote control capabilities.

Without an embedded remote support solution, supporters spend extra time switching back and forth from their remote support application and Microsoft Dynamics 365. By embedding TeamViewer remote control into Microsoft Dynamics 365, supporters can assist users without switching applications, giving them time to help more users.

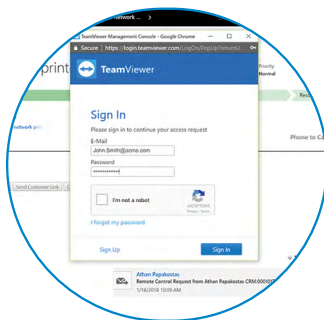


Figure 1: For convenience and security, the first time each supporter uses the embedded TeamViewer functionality, they will be prompted to log in with their licensed TeamViewer account. This is only required once.

Customer service, sales, and pre-sales representatives can initiate secure remote sessions during customer interactions from within Microsoft Dynamics 365. With one click, customers are notified of a remote session request, which can be accepted immediately or queued for issue resolution at a later time. Once accepted, the supporter can take control of the user's device or provide guidance to resolve issues quickly.

Team managers and administrators get full visibility into how TeamViewer remote sessions are used. They can create reports and dashboards to document and track key metrics, including:

- Length of sessions
- Number of cases
- Details on customer/prospect contact touch points
- Resolution times

Key Benefits for Customers

Improve efficiency by never leaving Dynamics 365

Empower customer support agents and sales representatives to remotely connect to their customers' devices right from their Dynamics 365 environment without having to toggle to different applications.

Increase productivity by optimizing support workflows

The user flow is seamless and can be customized to support different company processes, such as creating tailored email templates for different groups and languages, graphical dashboards, and others. Real-time notifications that alert supporters when users are ready for support free supporters to work on other tasks until users are ready.

Help sales teams convert prospects faster

TeamViewer allows sales teams to assist prospects in setting up trials, walking prospects through how best to use their product, and providing ad hoc demos. This capability makes the call more richly consultative and increases the efficiency of the call by allowing sales personnel to answer prospect questions in depth, immediately.

Solution Highlights

- **Cross-Platform Compatibility**
Resolve technical issues faster and boost productivity by remotely accessing and supporting any employee device across platforms, including Windows, Linux, Mac, iOS, and Android.
- **Remote Onboarding**
Reduce errors and service calls by guiding employees to configure and use corporate applications in real time, without compromising the security of corporate data.
- **On-Demand Customer Support**
Remotely support external customer devices to reduce issue resolution time and increase customer satisfaction.
- **Manage Multiple Support Requests**
The visibility of real-time notifications in any MS Dynamics 365 screen provides an efficient way to manage multiple support requests at the same time, significantly increasing staff productivity.

Key Features

Easy One-Time Setup

With easy one-time setup in Dynamics 365, the out-of-the-box TeamViewer integration is ready to use in minutes.

Industry-Grade Security

TeamViewer remote support sessions are secured by end-to-end encryption, powered by ISO/IEC 27001 certified data centers. GDPR and HIPAA compliant, TeamViewer has built-in security protocols to keep sensitive employee, corporate, and customer data safe and protected.

Real-Time Notifications

After sending a connection request, a supporter does not have to sit idly until the user responds. When the user clicks the support session link to accept the invitation, whether that's right after receiving the invitation or hours later, the supporter is notified immediately of which user is online and ready for support, no matter which screen the supporter is on at the time. These real-time cross-screen notifications give IT support teams and customer service agents the flexibility to handle multiple cases at the same time, for faster response times.

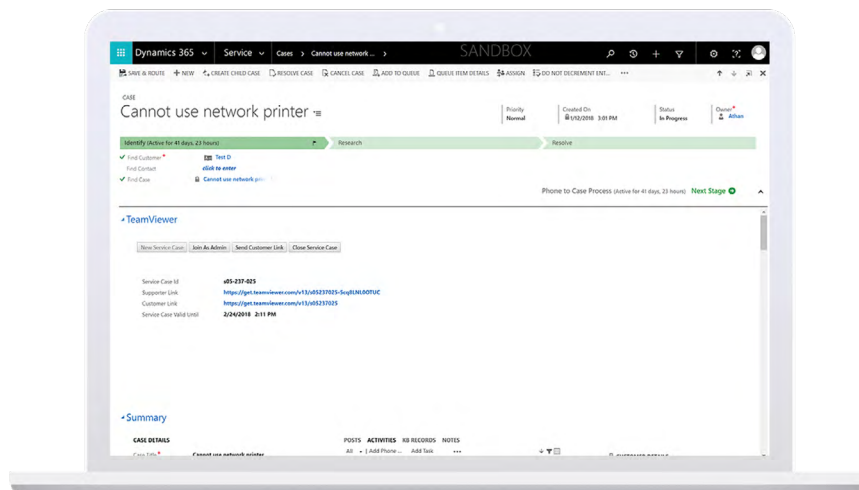


Figure 2 – Support cases are created from within Microsoft Dynamics 365.

Resources

[Get the TeamViewer integration for MS Dynamics 365 at Microsoft AppSource](#)

[Learn more about TeamViewer for Microsoft Dynamics 365](#)

[Request a free demo](#)

[Learn more about TeamViewer security standards at our Trust Center](#)

License Requirements

The TeamViewer integration for Microsoft Dynamics 365 requires a TeamViewer Premium,* Corporate, or Tensor license subscription.

*Some functions will be limited with the Premium license.

About TeamViewer

As a leading global remote connectivity platform, TeamViewer empowers users to connect anyone, anything, anywhere, anytime. TeamViewer offers secure remote access, support, control, and collaboration capabilities for online endpoints of any kind and supports businesses of all sizes to tap into their full digital potential. TeamViewer has been activated on approximately 2.2 billion devices; up to 45 million devices are online at the same time.

Founded in 2005 in Göppingen, Germany, TeamViewer is a publicly held company listed on the Frankfurt Stock Exchange, employing about 1,000 people in offices across Europe, the US, and Asia Pacific.

www.teamviewer.com

