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Microsoft Dynamics Text Messaging Integration

Introduction

Integrating SMS text messaging into Microsoft Dynamics makes this premier CRM system even better. Adding SMS text messages to your email communications can generate new leads, increase productivity, and boost sales for enterprise businesses. It's important to find a truly native SMS text messaging integration for MS Dynamics in order to realize the full benefit. Here's what you need to know.

The highest ROI MS Dynamics SMS Integrations are built using [Microsoft Development Tools](#) and operate seamlessly within your existing IT infrastructure. Truly native SMS integrations offer an array of enterprise-grade features built for scale and reliability AND operate inside of your existing Microsoft Dynamics 365 database.

When selecting a Microsoft Dynamics SMS texting solution, look for the following:

Native Microsoft Dynamics Integration

When adding SMS text messaging to Microsoft Dynamics, compatibility is a major concern. Native integration means that applications are built using Microsoft's own development tools to improve security, performance, and reliability.

Although some SMS text messaging providers report having Microsoft Dynamics Integration, it's important to clarify what they actually mean. Many times, such integrations are in fact data connections that merely sync contact info between the vendor's application and your Microsoft Dynamics 365 instance.

This means you will have to open a separate window in order to send your text messages as opposed to having them embedded into the menu system right inside your MS Dynamics window.

Other vendors use automation tools like Zapier or Boomi as intermediaries between their messaging services and client databases. While tools like these have their place, 3rd party solutions are typically not the best solution for enterprise-grade SMS text messaging, and they can substantially increase your costs per text message.

Since both inbound and outbound requests count as separate transactions, the total cost of ownership grows rapidly as messaging volume increases. Automation platforms like these provide quick access to basic integrations but remain prone to unwelcome side effects.

For instance, Zapier adds its own fees to your messaging costs and 15-minute Zapier messaging delays are not uncommon (depending on the service plan and configuration). Most enterprise-grade businesses eliminate the middleman and need to avoid message delays.

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Many non-native MS Dynamics SMS applications require using provider infrastructures to send SMS messages (not your own). A questionable arrangement subject to a host of vulnerabilities and problems. True Native Integration eliminates these concerns because SMS messages flow directly from within your CRM database.

Ease of Use

With native integration, on-boarding and training times can be significantly reduced. Since there's no need for additional accounts or logins – users already familiar with the Microsoft Dynamics CRM ecosystem can take full advantage of native SMS integrations immediately.
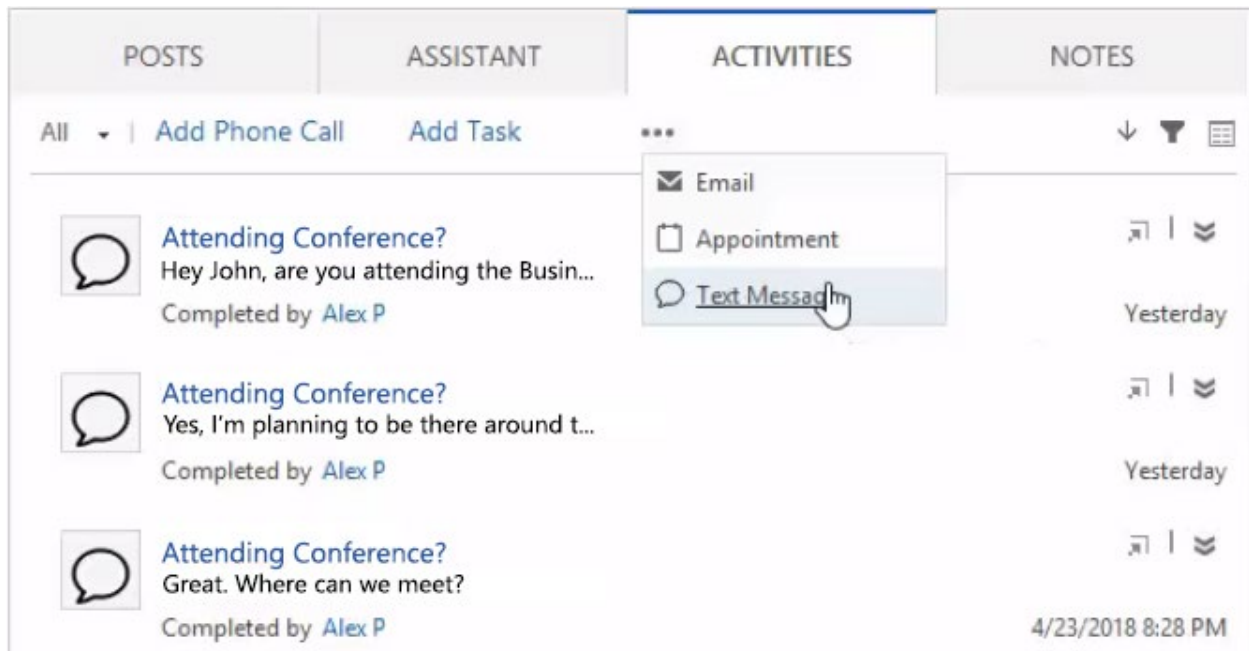
Engage in SMS texting directly from your CRM dashboard.

Native integrations bypass the steep learning curve often associated with implementing 3rd-party solutions and make your organization more efficient.

Enhanced Security

Another benefit of native SMS integration is enhanced security and better control over data access. Built for large organizations, enterprise-grade SMS texting features make system administration easier. Because they use the same security protocols as other Microsoft applications, data security breaches or containment issues are minimized.

Most importantly, data never resides on questionable 3rd-party servers.

On-premise MS Dynamics installations utilize local data processing and storage servers while cloud-based setups reside on Microsoft's trusted, ultra-secure network.

Administrators rest easy knowing critical data is protected and always available.

Improved Performance

Native apps (built using Microsoft Development Tools) share the same legendary performance and uptime associated with traditional Microsoft products. Because native applications live entirely within the user's Dynamics 365 instance, they're naturally more efficient and less susceptible to problems.

Businesses that use native, cloud-based SMS Integrations have higher reliability and since native apps exist within your specific Microsoft Dynamics 365 environment, database updates are never needed between you and outside vendors.

As long as the Microsoft Dynamics database is operational, your data is accessible.

However, to take full advantage of these capabilities, you must choose a cloud-based SMS text messaging provider with a native text messaging integration. Ideally, an enterprise-grade platform with similar uptime and performance metrics as those of your Dynamics 365 database.

Compatibility and Extended Functionality

Because they're built with the same software development platforms, native MS Dynamics apps integrate seamlessly with other Microsoft products and services. With so many powerful API and customization features, system configuration options are virtually endless.

You can connect freely with other Microsoft Core Services or create custom solutions of your own knowing that compatibility won't be an issue in your CRM environment.

Partnering with an SMS Text Messaging vendor who supports cloud-based Microsoft Dynamics 365 installations offers even more possibilities. Like taking advantage of Microsoft's powerful, cloud-only custom integrations and smart reporting functions (powered by machine learning).

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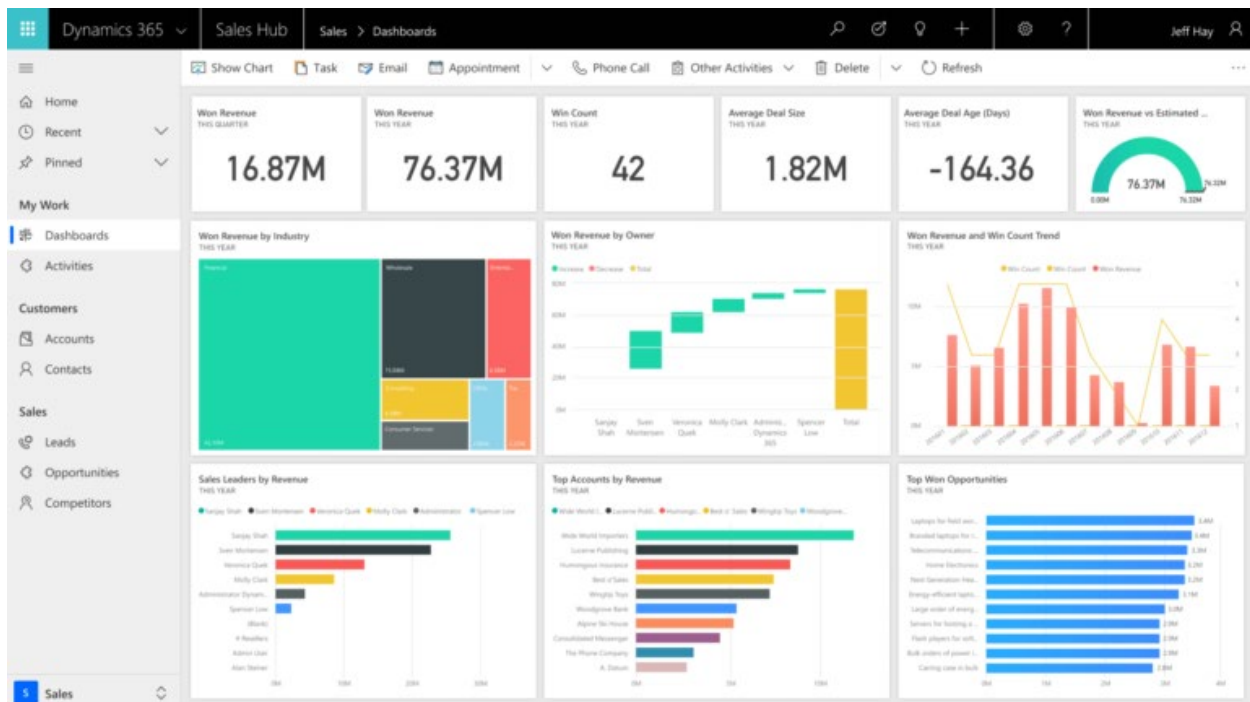
Cloud-based installations extend CRM functionality and reporting capabilities.

Many of these add-ons benefit from including SMS text messaging and reporting functionality. For example:

PowerBI

Microsoft's flagship business analytics solution offers valuable data insights and customizable displays of performance metrics. These stunning reports can easily be embedded in apps, webpages, or shared with others both inside and outside of your organization.

Flow and PowerApps

A drag-and-drop suite of tools to create built-in workflows and custom automation sets. Users can easily personalize over 200 different Microsoft/partner applications based on business logic and enterprise needs.

Automated workflows improve productivity and enable collaboration at an unprecedented scale. They also provide the ability to create new processes without having to write a line of code or hire a developer.

Web Portals

MS Dynamics 365 cloud databases include native support for building self-service web portals. These websites are easy to share and maintain and can be used for a number of different internal applications.

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Learning Paths

A relatively new Microsoft Dynamics CRM feature allows organizations to strengthen and enhance user experiences. Administrators can build "paths" to deliver custom content to specific users/groups accessing the database.

Such automation can significantly reduce training times/costs by allowing the user to control their own learning experience.

However, these add-ons are only available for cloud-based MS Dynamics and Dynamics 365 installations. Thus, it's paramount to choose providers who support Dynamics cloud databases to take full advantage of an MS Dynamics SMS text messaging integration.

Long Code vs. Short Code SMS Texting Options

A frequently overlooked component of selecting a vendor for an MS Dynamics texting integration is understanding when to use Long Codes Vs. Short Codes. Which is one of the most important factors to consider.

Long Codes

Long Codes are 10-digit numbers used for direct 2-way communication with two or more parties. Following the traditional number format of landlines and cell phones, long codes are used in voice calls, faxes, and text messages.

Being able to call and text from the same number has distinct advantages. The biggest of which is providing customers direct access to your brand via a single point of contact.

Long codes are ideal for creating personalized experiences and seamless two-way conversations.

However, carrier restrictions prohibit sending mass SMS marketing messages using long codes. Violations can incite legal action and cause vendors to forfeit long codes already assigned.

Hence, Short Codes are essential as well.

Short Codes

Short Codes serve entirely different purposes than Long Codes. These 5 to 6-digit numbers are used frequently for marketing, alerts, and mass one-way communication. Short Codes are designed for sending bulk SMS Marketing Messages and Mass Notifications.

Although less personal than Long Codes, Short Codes facilitate messaging millions of clients or

subscribers at the same time. Yet, this messaging format also has limitations.

Shared Short Codes are the most common option among smaller SMS text messaging providers. A "shared" number means multiple businesses use the exact same code. The differentiator being the keyword brands use to connect with their customers.

For example, Short Code 95660 may respond to keyword "drive" for an auto dealer and "pedal" for a bike shop.

The problem is Shared Short Codes cannot engage in 2-way dialog using the same channel. Nor can they retain conversational data for administrative purposes for more than a short period of time.

While some SMS vendors claim this is possible, most implementations fall far short for enterprise brands focused on customer service.

The result forces customers to use alternate contact methods to continue the conversation, adding yet another layer of friction and creating a less personal experience. To combat this problem, some providers offer Dedicated Short Codes with unfettered access. However, this option can be expensive and still makes customers call back using a different number.

The solution? Choosing a provider who offers all three options at once. Long Codes, Shared Short Codes, and Dedicated Short Codes to fit an array of business scenarios.

SMS Text Messaging Service and Support

Incorporating SMS texting into Microsoft Dynamics 365 adds tremendous value. However, the right setup and support are crucial to fully leverage your investment.

Look for SMS providers who build and support their own technologies rather than piggybacking off other SMS APIs or generic integration tools. True enterprise-grade SMS vendors provide native SMS integrations, direct carrier connections, and maintain their own fully documented SMS APIs.

Besides offering higher-performance and optimal pricing, top vendors employ dedicated technology teams and seasoned developers who understand how to properly integrate new SMS texting solutions.

Leading SMS vendors provide knowledgeable installation teams to assist with new setups or transition over from existing ones. Premium SMS solutions also include automated software wizards to help with common tasks and provide troubleshooting assistance should problems arise.

Seek out vendors who employ US-based support agents who understand the unique needs of enterprise businesses and large organizations. Overseas service options can introduce language barriers and create support hours outside of US standards.

Enterprise Scalability and Pricing

When integrating SMS text messaging into MS Dynamics 365, choose an experienced vendor who understands enterprise businesses, maintains direct carrier connections, and offers volume pricing and scalability.

SMS texting vendors who deal primarily with small businesses often lack the resources to manage mass SMS traffic volume – including reliable mass deliverability and proper queuing protocols for competing campaigns.

Insist on using cloud-based providers who have the bandwidth and speed necessary to handle large-scale volume.

You'll find that market pricing varies as many SMS vendors simply build their interfaces on top of other provider's SMS APIs. In most cases, these are resellers with little or no flexibility to offer volume discounts as you grow. The best SMS providers build their own SMS API and connect directly with carriers to eliminate costs and offer enterprise level pricing.

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TrueDialog – Microsoft Dynamics 365 SMS Text Message Integration Experts

TrueDialog is the perfect solution for enterprise-grade SMS texting capabilities. Our cloud-based SMS text messaging solution is built for big business, yet made easy for small business.

Our five-star-rated platform includes an ISO 9001 database, direct carrier connections, 99.9% uptime, and true native Microsoft Dynamics 365 integration. If you're serious about implementing an enterprise-grade MS Dynamics text messaging solution to deliver personalized customer engagement at scale, TrueDialog is an ideal solution.

Our proprietary "TrueDialog" feature enables seamless texting with both Short Codes and Long Codes all combined in the same thread, so businesses can send mass text messages and then effortlessly engage in one-to-one texting conversations at scale.

Unlike many other solutions, TrueDialog has invested in building direct carrier connections which eliminate the middleman and provide our customers with two huge benefits: 1) improved deliverability by reducing potential points of failure and reliance on third parties and 2) a lower cost structure which allows us to price our service significantly lower than the competition.

Additionally, we offer local US-based support (in tech-savvy Austin, Texas) from knowledgeable staff and developers who understand the unique needs of enterprise businesses. Our industry-leading features are state-of-the-art yet still provide the best value in SMS text messaging.

Interested in learning more?

If you're ready to add integrated SMS Texting capabilities to your existing IT infrastructure, give us a call today at 512-501-5940 to schedule a demo of our Salesforce SMS integration and let us show you why we have the best SMS enterprise-grade platform on the market.