Adding Phone Call Activity in CRM

02/13/2024 6:28 pm EST

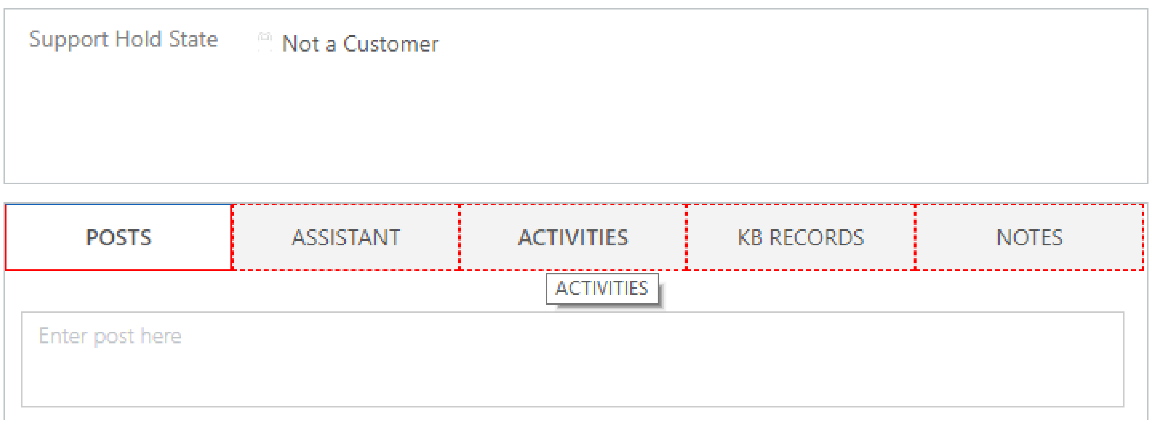
These are instructions on the various ways to add phone call activity using the Microsoft Dynamics CRM System. There are four main methods to add phone activity along with when to use each method.

Method 1 - Adding Phone Call Activity to a Case

This method is used when a phone call has been received, or a phone call was made specifically regarding a case in the system. If a Case does not exist for the call, but the customer needs a case made, please see our instructions on Creating a Ticket.

1. If the customer is calling regarding a case pull up the Case in question.

2. With the ticket open, select the "ACTIVITIES" tab located under General.



3. With activities selected, click the "Add Phone Call" hyperlink.

4. Once selected, enter all pertinent information to the phone call as needed

- Give a full description of what the phone call was about
- Select whether the call was made or received (Outgoing or Incoming)
- Specify who the call was with (Searchable by company, contact, or multiple contacts)
- If a voicemail was left on an outgoing call, check the "Left voice mail" checkbox.

5. Select "OK" to save your phone call information.
6. Verify the call has been added by checking the activity added on the Case under the "ACTIVITIES" tab.