KAKAPO
SYSTEMS

UNITY CRM INTEGRATION

MS Dynamics

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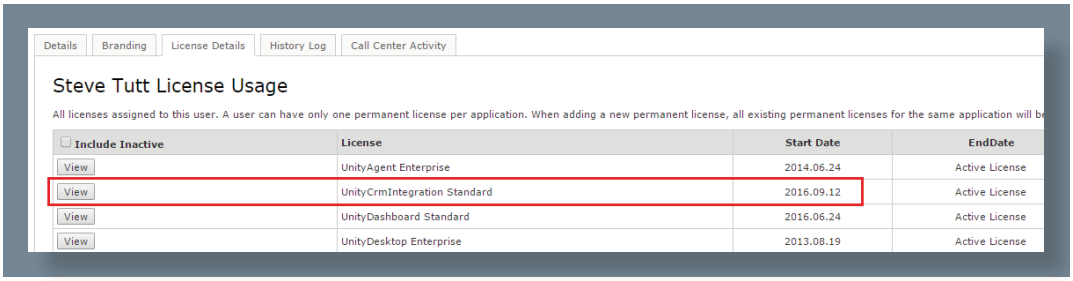
1 OVERVIEW

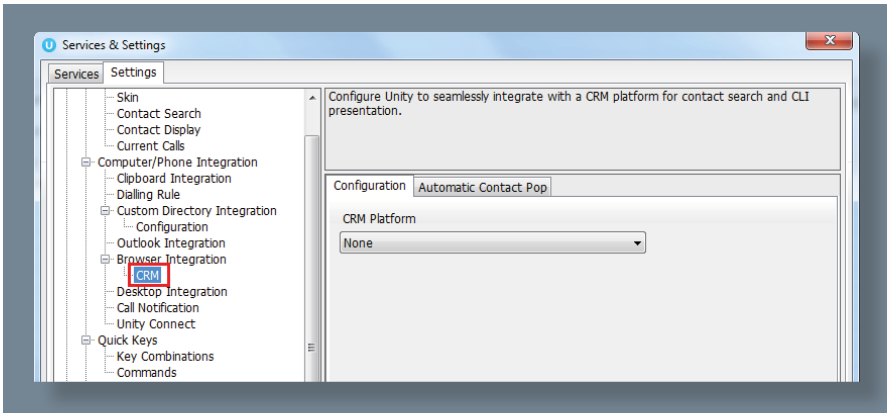
Unity seamlessly integrates with MS Dynamics to facilitate contact lookup and 'popping' for inbound and outbound calls, searching for CRM contacts within Unity and click to dial both from within Unity and MS Dynamics.

This functionality relies on a CRM Integration license being assigned to the user, as shown below. Please note this license is required in addition to the base license for Unity Desktop, Agent, Supervisor or Reception. However, this functionality is included in all trial licenses for these Unity clients.

If a CRM Connector license has not previously been assigned to the user, then a trial license will automatically be assigned the first time CRM configuration settings are entered in Unity.

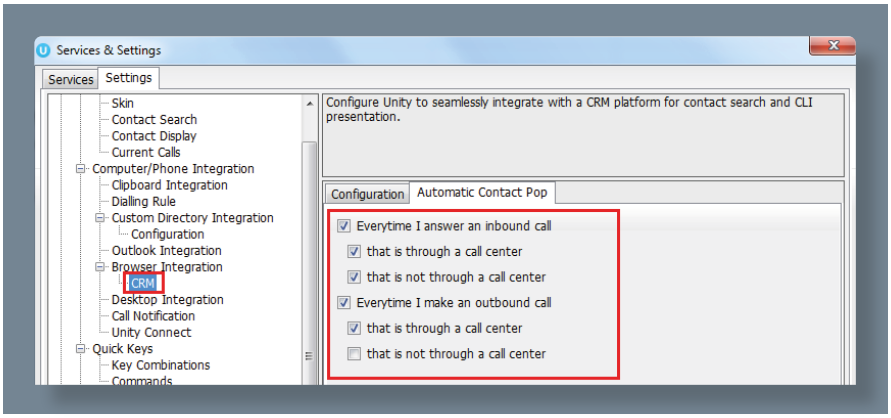


Once this license is assigned and Unity is restarted, the CRM panel will become available in Settings, as shown below.



To configure Unity to integrate with a CRM platform, simply select the CRM platform from the dropdown list and complete the required fields, as outlined in sections below.

You can also configure Unity to automatically pop the CRM contact when the phone is answered, as shown below.



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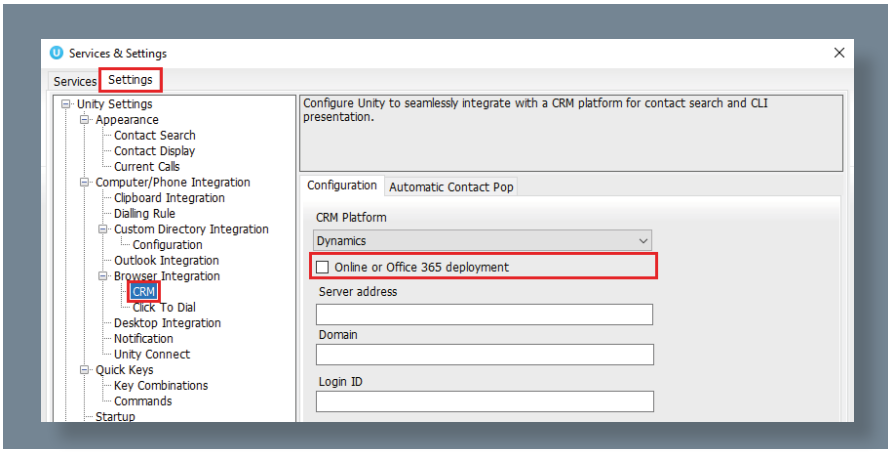
2 CONFIGURING MS DYNAMICS INTEGRATION

2.1 INTEGRATING MS DYNAMICS

To integrate your MS Dynamics into Unity go to Settings>CRM then select Dynamics from the drop down menu.

If your MS Dynamics is Online or Office 365 deployment then tick the box.

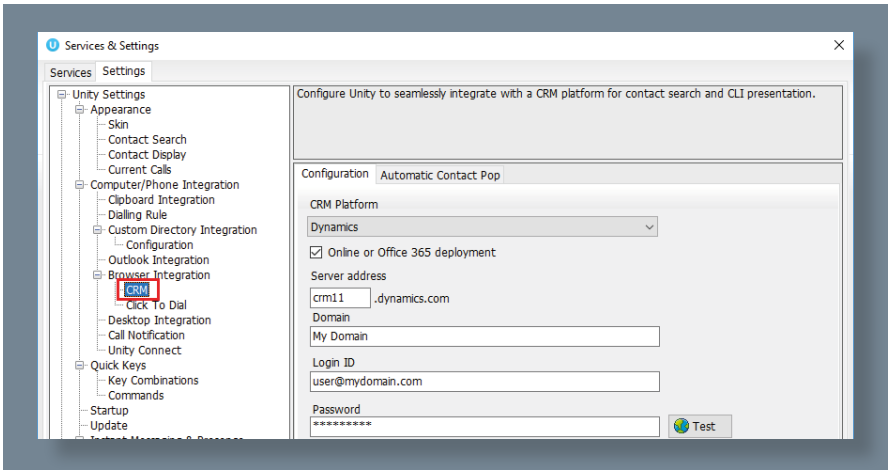


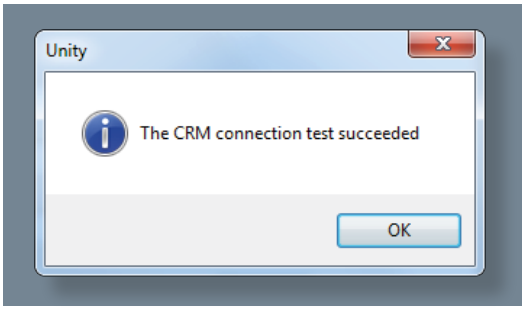
If your MS Dynamics is not Online or an Office 365 deployment, then leave the box empty and enter a server address.

Enter the domain, login ID and password then click Test to ensure the details are correct.

2.2 LOGIN ID AND PASSWORD

If you are using Online or Office 365 Deployment, enter the login ID and password along with your domain.





Click the test button to save and test the log in details. Once the CRM connection test has been successful click OK.

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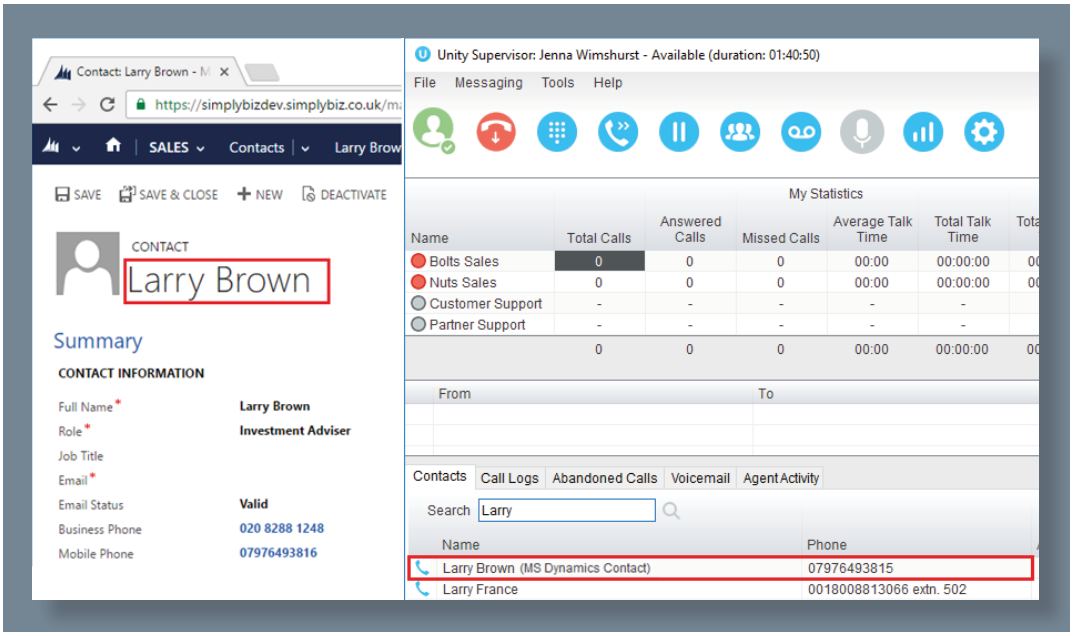
3 UNITY CRM FUNCTIONALITY

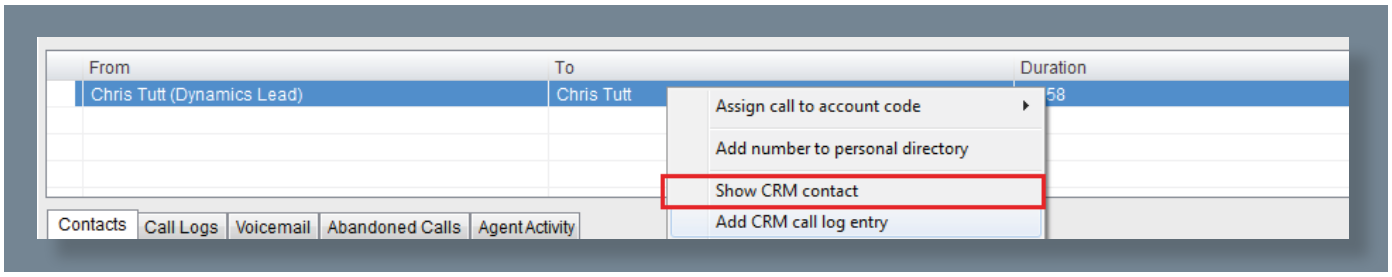
3.1 CONTACT POP

Unity will use MS Dynamics to identify inbound and outbound calls, including queued call center calls.

At any time, you can search for CRM contacts from within Unity and perform click to dial to make an outbound call to the contact, or display the contact in the CRM platform (this is referred to as 'popping' a contact) as shown below.



You can also right-click a call to pop the record in MS Dynamics using the default browser, as shown below. This assumes the contact was found in the CRM platform rather than another directory (for example an Outlook contacts folder).



You can also click on the call details 'toast' notification popup to pop the contact, as below. Again, this assumes the contact was found in the CRM platform.

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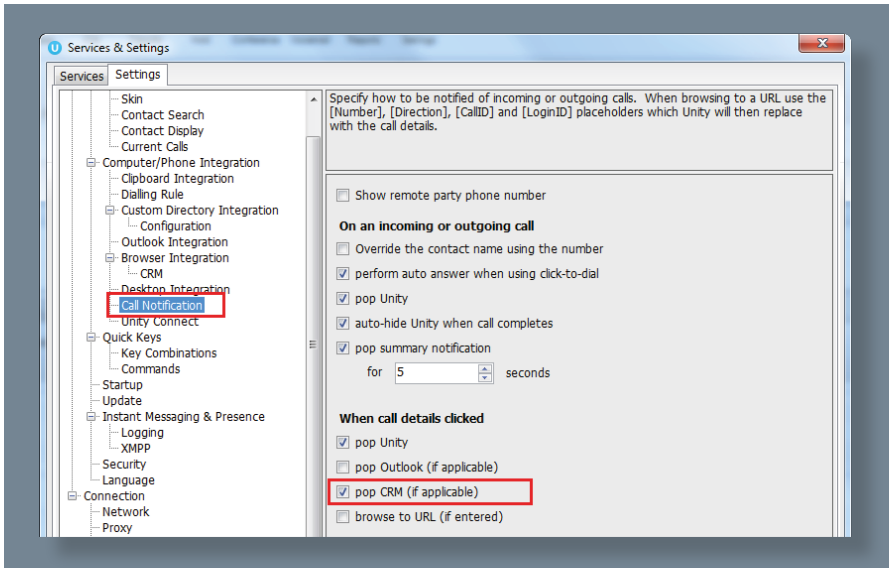
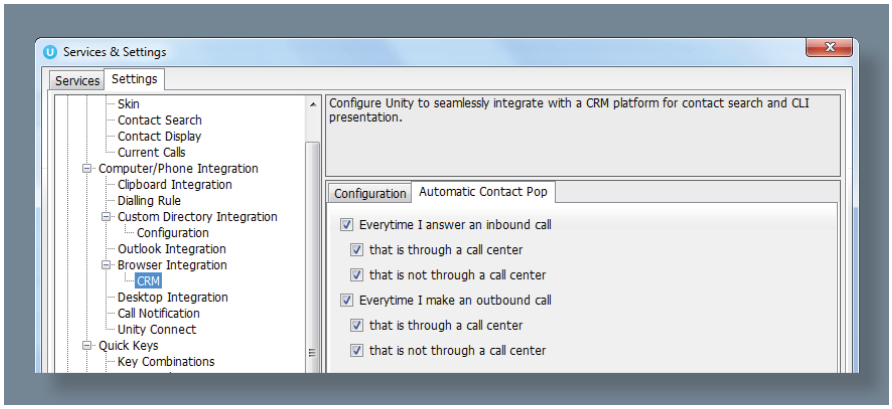
This feature depends on the appropriate Call Notification setting being activated, as shown below.



Unity can also be configured to automatically pop the CRM contact when the call is answered, which depends on the Automatic Contact Pop tab settings as shown below.



3.2 CONTACT SEARCH

When you perform a contact search, Unity will check all directories such as the group/ enterprise phone list, personal directory and Outlook etc; but it will also search MS Dynamics and return results. You can search on contact name or company name, as shown below. Simply double click an entry to call that number.

Please note that you will need to type in a minimum of three letters to search for a CRM contact.

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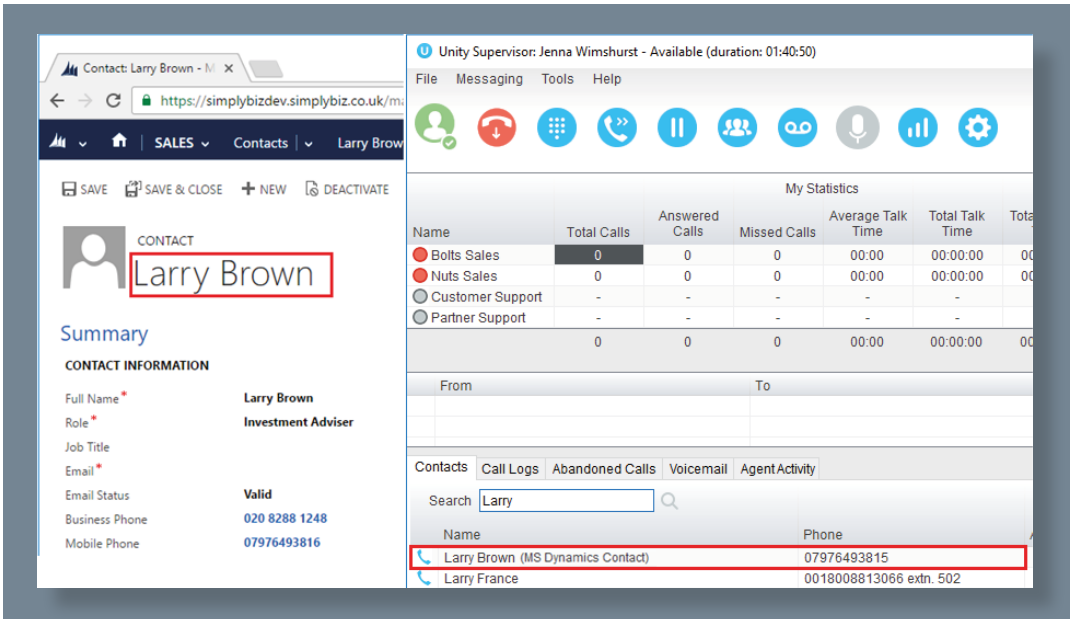
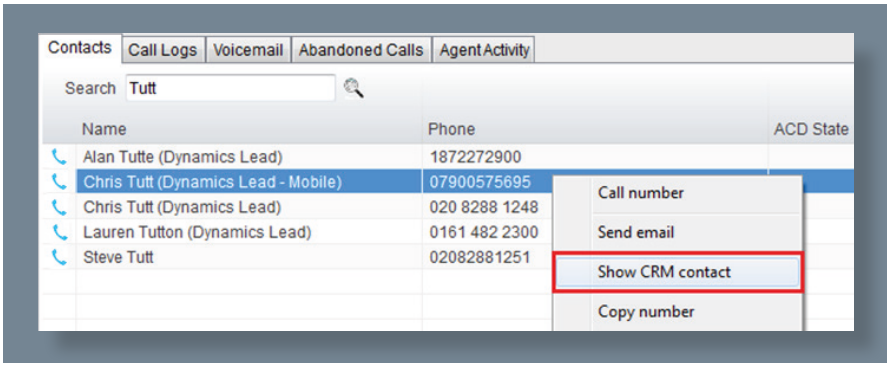


You can also right-click entries to send an email using the default mail program.

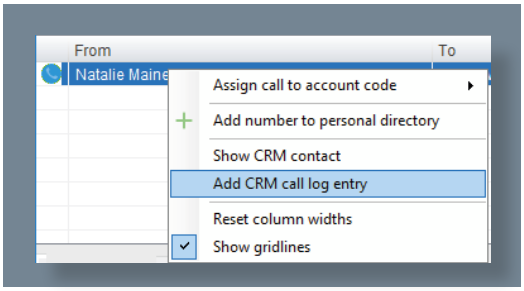


3.3 CALL LOG ENTRY

When integrated with MS Dynamics, Unity can add call log entries on behalf of the user, as outlined below.

3.3.1 Manual Call Log Entry

Right-click on a call and select to add a call log entry, as shown below.



Unity will enter basic details of the call depending on if the call is inbound or outbound, as shown below. Remember this call log will be stored in MS Dynamics so an outbound call in Unity is an inbound call in MS Dynamics, because we have called the contact.

You can now add further notes manually, then click OK to save the call log entry.

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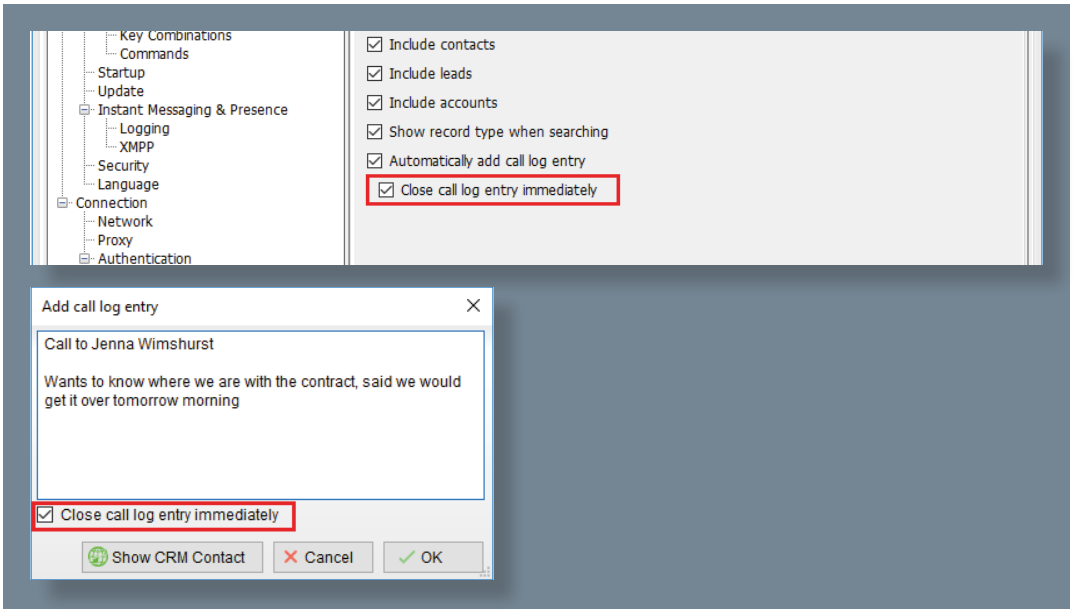
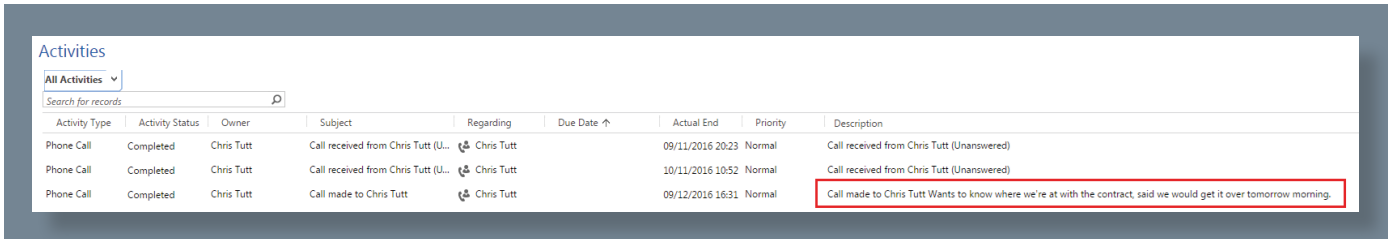
The call note will be saved against that contact in the CRM platform, please note that you can specify whether to close the status of the call log entry in the CRM platform or keep it open by ticking the box.



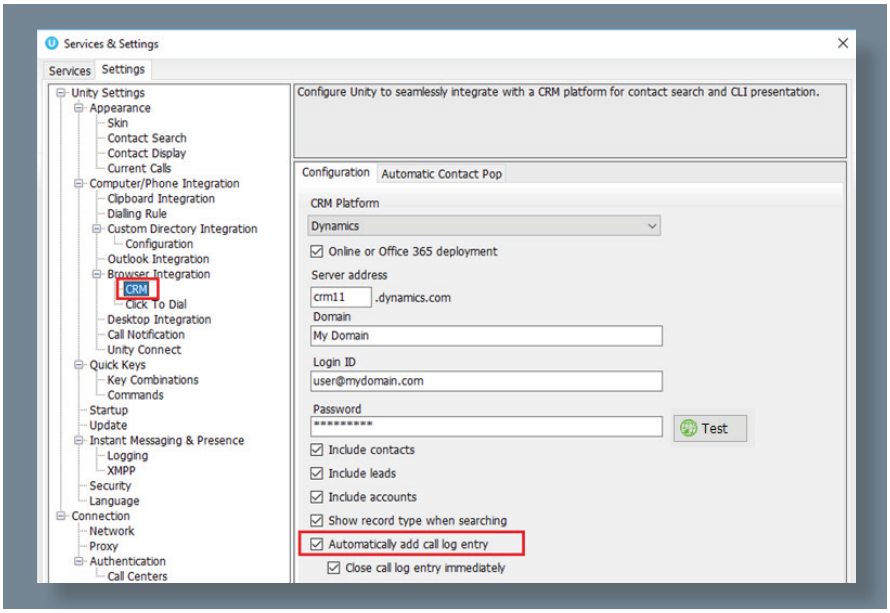
If we click Show CRM Contact or Cancel the call log will **not** be saved.

You will now see this call log entry in MS Dynamics, as shown below.



3.3.2 Automatic Call Log Entry

Unity can be configured to automatically add a call log entry for any calls where a call log hasn't been manually created using the steps above. This feature is activated as shown below.



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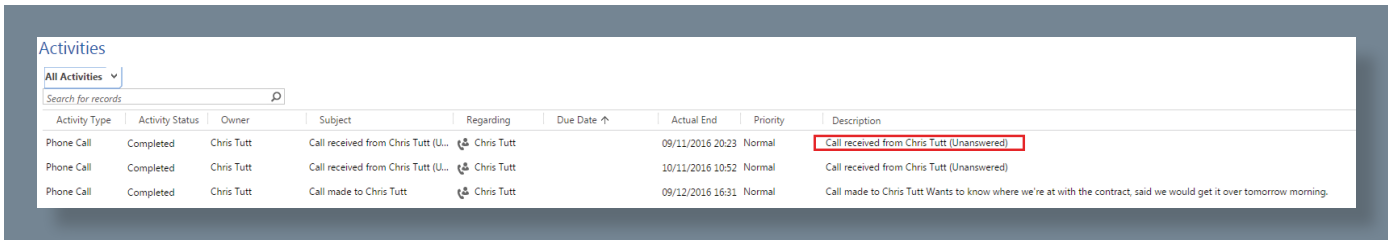
Unity will automatically add call log entries when the call is released [the same time it is removed from the Active Call List in Unity]. Only basic information on the call is presented, based on the direction of the call and the Unity user that made or received the call. MS Dynamics will timestamp the call internally.

This shows an unanswered call from the MS Dynamics contact to the Unity user.



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