

# VOTACALL UNITY

## CRM INTEGRATION - MS DYNAMICS

votacall)))



### HELP GUIDE

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## 1. OVERVIEW

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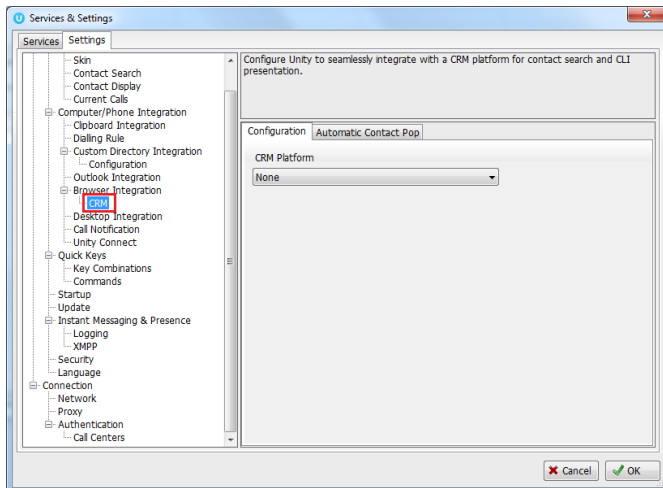
Unity seamlessly integrates with MS Dynamics to facilitate contact lookup and “popping” for inbound and outbound calls, searching for CRM contacts within Unity and click to dial both from within Unity and MS Dynamics.

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.

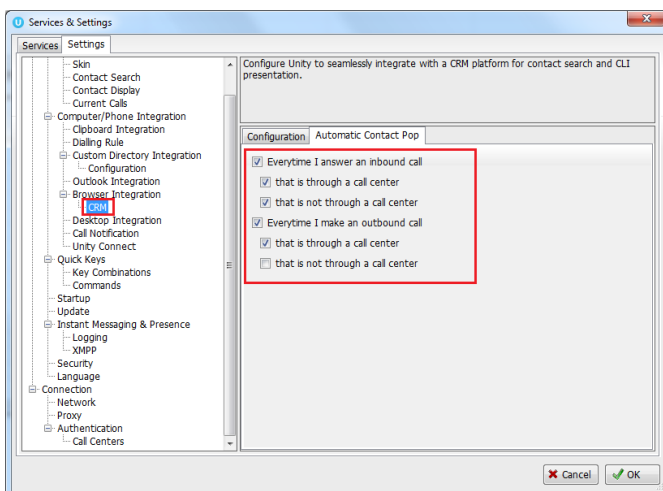
Details	Branding	License Details	History Log	Call Center Activity
<b>Steve Tutt License Usage</b>				
All licenses assigned to this user. A user can have only one permanent license per application. When adding a new permanent license, all existing permanent licenses for the same application will be				
<input type="checkbox"/> Include Inactive	License		Start Date	EndDate
<a href="#">View</a>	UnityAgent Enterprise		2014.06.24	Active License
<a href="#">View</a>	UnityCrmIntegration Standard		2016.09.12	Active License
<a href="#">View</a>	UnityDashboard Standard		2016.06.24	Active License
<a href="#">View</a>	UnityDesktop Enterprise		2013.08.19	Active License

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.

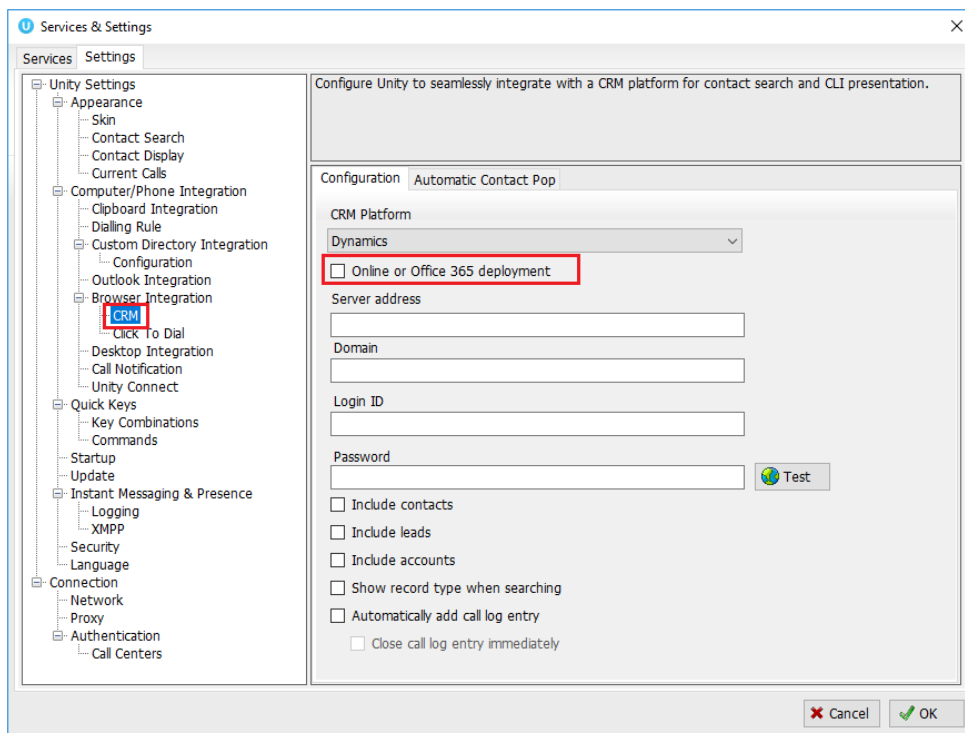


## 2. CONFIGURING MS DYNAMICS INTEGRATION

### 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.

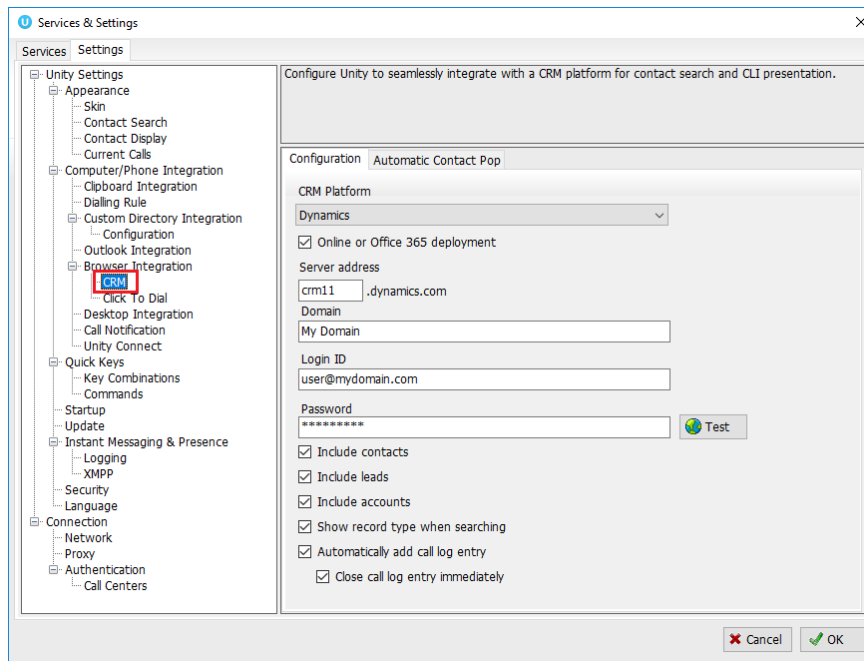


If your MS Dynamics is not Online or an Office 365 deployment, then leave the box empty and enter a server address.

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

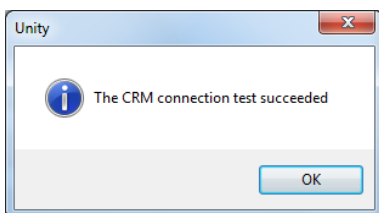
### 2.2 LOGIN ID AND PASSWORD

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.



## 3. UNITY CRM FUNCTIONALITY

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### 3.1 CONTACT POP

Unity will use MS Dynamics to identify inbound and outbound calls, including queued call center calls. Please note that if the same number is attached to a contact in the directory and in the CRM platform then Unity will find and use the directory contact in the Active Call Window.

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.

The screenshot shows the Unity Supervisor interface. On the left, the 'CONTACT' section for 'Larry Brown' is displayed, including his role as 'Investment Adviser' and contact details. On the right, a table shows 'My Statistics' and 'Overall Queue Statistics' for various call types. Below the table, a search bar and a list of contacts are visible, with 'Larry Brown (MS Dynamics Contact)' highlighted.

Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Total Staffed Time	Total Calls	Answered Calls	Missed Calls	Queue	Average In Queue Time	Average Wait Time
Bolts Sales	0	0	0	00:00	00:00	00:00	0	0	0	0	00:00	00:00
nutsales@drd.co.uk	0	0	0	00:00	00:00	00:00	0	0	0	0	00:00	00:00
Partner Support	-	-	-	-	-	-	12	12	0	0	00:09	00:03
Customer Support	0	0	0	00:00	0	0	42	38	4	0	00:23	00:01
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>00:00</b>	<b>0</b>	<b>0</b>	<b>54</b>	<b>50</b>	<b>4</b>	<b>0</b>	<b>00:08</b>	<b>01</b>

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).

The screenshot shows a call log table with columns 'From', 'To', and 'Duration'. A right-click context menu is open over the 'To' column, showing options like 'Assign call to account code', 'Add number to personal directory', 'Show CRM contact' (highlighted with a red box), and 'Add CRM call log entry'.

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.

The screenshot shows a Windows taskbar with a toast notification popup. The notification displays 'To: Chris Tuft' and 'From: Steve Toms (Dynamics Lead)'.

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

The screenshot shows the 'Services & Settings' window. The 'Settings' tab is selected, and the 'Call Notification' option under 'Desktop Integration' is highlighted. The settings for 'Call Notification' are displayed on the right, including options for 'On an incoming or outgoing call' and 'When call details clicked'.

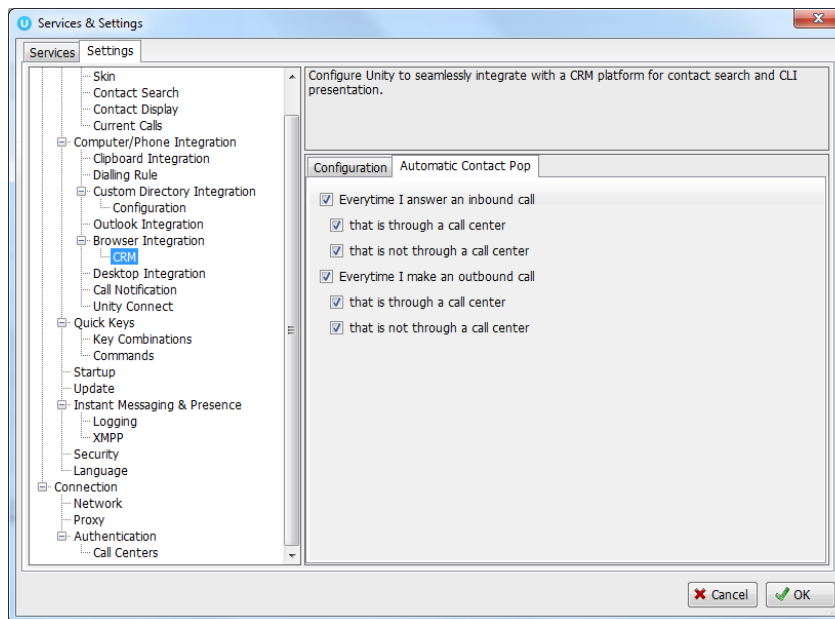
**On an incoming or outgoing call**

- ☐ Show remote party phone number
- ☐ Override the contact name using the number
- ☒ perform auto answer when using click-to-dial
- ☒ pop Unity
- ☒ auto-hide Unity when call completes
- ☒ pop summary notification for 5 seconds

**When call details clicked**

- ☒ pop Unity
- ☐ pop Outlook (if applicable)
- ☒ pop CRM (if applicable)
- ☐ browse to URL (if entered)

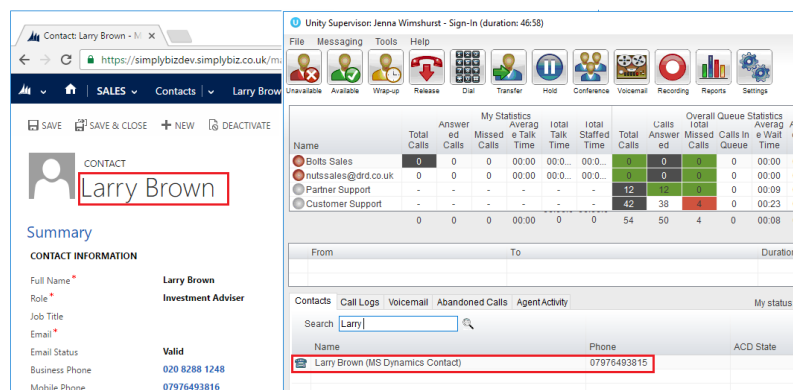
Unity can also be configured to automatically pop the CRM contact when the call is answered, which depends on the Automatic Contact Pop tab settings as shown below.



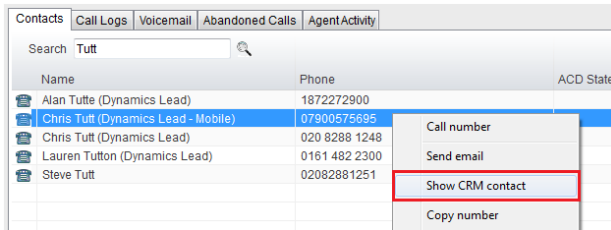
## 3.2 CONTACT SEARCH

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.



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

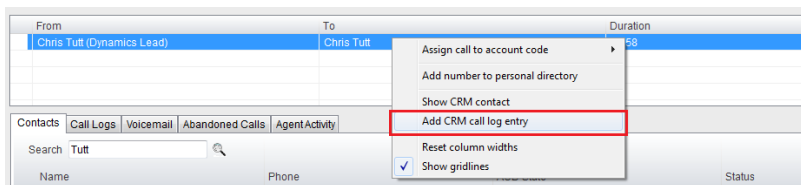


### 3.3 CALL LOG ENTRY

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

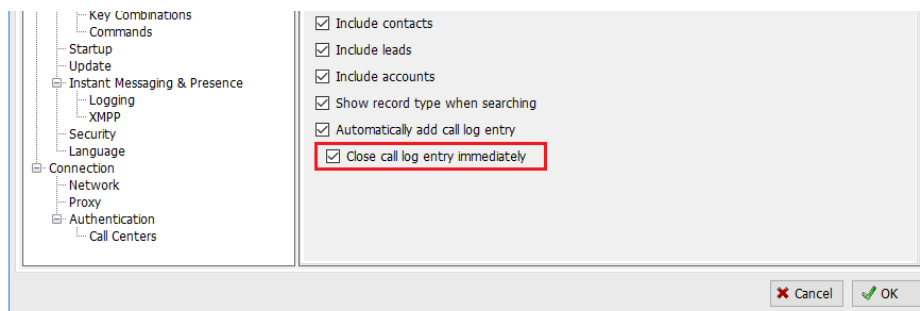
Right-click on a call and select to add a call log entry, as shown below.

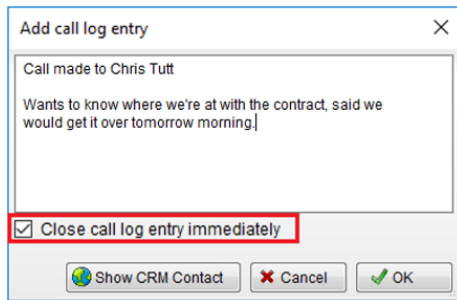


Unity will enter basic details of the call depending on if the call is inbound or outbound, as shown below. Remember this call log will be stored in MS Dynamics so an outbound call in Unity is an inbound call in MS Dynamics, because we have called the contact.

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

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.

Activities

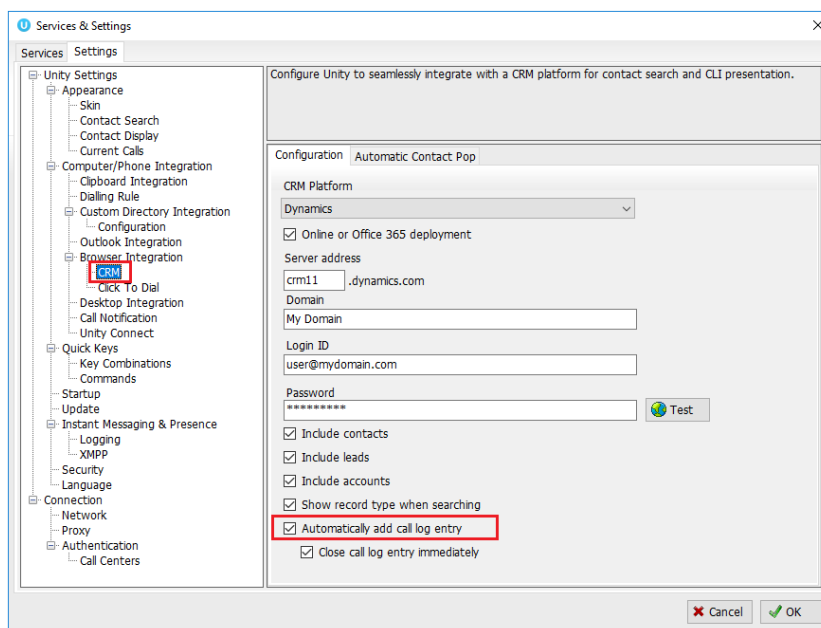
All Activities

Search for records

Activity Type	Activity Status	Owner	Subject	Regarding	Due Date ↑	Actual End	Priority	Description
Phone Call	Completed	Chris Tutt	Call received from Chris Tutt (U...	Chris Tutt		09/11/2016 20:23	Normal	Call received from Chris Tutt (Unanswered)
Phone Call	Completed	Chris Tutt	Call received from Chris Tutt (U...	Chris Tutt		10/11/2016 10:52	Normal	Call received from Chris Tutt (Unanswered)
Phone Call	Completed	Chris Tutt	Call made to Chris Tutt	Chris Tutt		09/12/2016 16:31	Normal	Call made to Chris Tutt Wants to know where we're at with the contract, said we would get it over tomorrow morning.

### 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.



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.

Activities

All Activities

Search for records

Activity Type	Activity Status	Owner	Subject	Regarding	Due Date	Actual End	Priority	Description
Phone Call	Completed	Chris Tutt	Call received from Chris Tutt (U...	Chris Tutt		09/11/2016 20:23	Normal	Call received from Chris Tutt (Unanswered)
Phone Call	Completed	Chris Tutt	Call received from Chris Tutt (U...	Chris Tutt		10/11/2016 10:52	Normal	Call received from Chris Tutt (Unanswered)
Phone Call	Completed	Chris Tutt	Call made to Chris Tutt	Chris Tutt		09/12/2016 16:31	Normal	Call made to Chris Tutt Wants to know where we're at with the contract, said we would get it over tomorrow morning.