

The background of the entire page is a photograph of two people shaking hands. A woman with curly hair is smiling and looking towards the camera. A man's hand is visible, wearing a ring, shaking her hand. The background is blurred with warm, bokeh light effects. A thick red diagonal line runs from the top right towards the bottom left, crossing the handshake. In the top left corner, there is a logo for 'KAKAPO SYSTEMS'.

KAKAPO

SYSTEMS

MS DYNAMICS INTEGRATION

**Unity Application Suite | Unity completely unifies
all customer contact, including calls, emails and
web chats at a user level within MS Dynamics**

COLLATE YOUR CONTACTS WITH UNITY AND MS DYNAMICS

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 the CRM platform.

Unity CRM Connector will pop the record in MS Dynamics, either automatically or when the user clicks the call notification. Outbound calls can be made from within MS Dynamics direct, or through Unity Contact Search.

MS DYNAMICS INTEGRATION

Auto pop MS Dynamics contact on answer

Unity Agent: Jenna Wimshurst

File Messaging Tools Help

My Statistics

Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Web Chats Received	Chats Answered	Chats Missed	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Web Chats Received	Web Chats Missed	Web Chats Queued	Callbacks Received	Callbacks Answered
Bolts Sales	0	0	0	00:00	00:00	0	0	0	4	0	4	1	00:11	00:00	00:00	0	0	0	0	0
Kakapo Systems	-	-	-	-	-	1	1	0	-	-	-	-	-	-	-	1	0	0	0	0
Nuts Sales	0	0	0	00:00	00:00	-	-	-	0	0	0	0	00:00	00:00	00:00	-	-	-	-	-
	0	0	0	00:00:00	00:00	1	1	0	4	0	4	1	00:11	00:00	00:00	1	0	0	0	0

Activity From To Duration Status

Call	Natalie Maines (MS Dynamics Contact)	Kakapo Systems	08:39	Reserved
Call	Jaik George (MS Dynamics Lead)	Bolts Sales	00:11	Queued at position 1

Contacts Activity Logs Abandoned Calls Voicemail

Search: george

Name Phone

George Harrison	02033456789
George Orwell (MS Dynamics)	02770774542
George Orwell (MS Dynamics)	
Jaik George	
Shan George	

Call number

Send email

Show CRM contact

Copy number

Answer call

Promote call

Transfer

Show agent activity

Reset column widths

Show gridlines

My status: available in office

Search MS Dynamics within Unity

Open MS Dynamics contact

Prioritize MS Dynamics leads in queue

Identify incoming calls

Automatic call logging

SALES Activities New Phone Call

SAVE MARK COMPLETE SAVE & CLOSE FORM

PHONE CALL : INFORMATION

New Phone Call

Phone Call

Call From * Joe CRM Phone Number 555407939

Call To * Gabriele Cannata (sample) Direction Outgoing

Subject * Discuss Upgrade

Speak with Gabriele at Adventure Works about upgrading



CLICK-TO-DIAL



CONTACT LOOKUP



QUEUE PROFILING



JOURNALING



CALL POPPING



“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 THE CRM PLATFORM.”

CONTACT SEARCH

Perform a contact search and Unity will not only check all directories, but it will also dynamically search your Dynamics contacts.

AUTOMATIC CALL POP

The user can easily view the contact in MS Dynamics and Unity can also be configured to automatically pop the CRM on answer.

ADD CALL LOG ENTRY

Easily configure Unity to automatically add a call log entry for any calls. Users can then add further notes manually, which will then be stored in MS Dynamics.

PRESENCE

Set your presence to alert colleagues to your current availability. Predefine routing, such as diverting calls to your mobile if you are out of the office.

Do it once and get it right first time. Unity's MS Dynamics integration completely unifies all customer contact, including calls, emails, chats and tweets at a user level within MS Dynamics.

All calls are journaled within MS Dynamics, including the direction of the call, with the option to edit the task log and leave the call log open or closed. MS Dynamics can be polled directly from Unity Search, combining all Outlook, group, personal and MS Dynamics contact numbers in one place.

PRIORITIZING QUEUED CALLS

- Prioritize contacts in queue
- Transfer MS Dynamics users to VIP queue
- Intelligently manage important calls



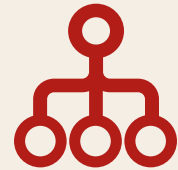
CLICK-TO-DIAL

- Click-to-dial from within MS Dynamics
- Turn web chats into calls instantly
- Flexibility for ad-hoc dialling



MULTI-CHANNEL INTEGRATION

- Web chat and email profiling
- View previous CC conversations
- Screen popping on all media



AUTOMATIC CALL JOURNALING

- Log all calls, web chats and emails
- Manually edit automatic log entries
- View full transcripts in MS Dynamics





ABOUT KAKAPO SYSTEMS

At Kakapo Systems, we are software solutions providers developing apps that enhance call and contact center offerings for the Cisco® BroadSoft® platform.

Our solutions are built for small to medium businesses, with an ethos that puts genuine human connection and intuitive, feature-rich, yet accessible applications at the forefront of our design decisions.

We are an international company, with offices in London and India, supporting clients all over the world.

NEXT STEPS

To request a free trial or demo of **MS Dynamics CRM Integration**:



Visit www.kakaposystems.com



Contact tellmemore@kakaposystems.com

FIND US ON





KAKAPO

SYSTEMS

© Kakapo Systems 2023

T +44 (0)207 084 6845

E tellmemore@kakaposystems.com

W www.kakaposystems.com

International House | 36-38 Cornhill | London | EC3V 3NG

FIND US ON

