

# UNITY – MS DYNAMICS INTEGRATION



Click-to-Dial



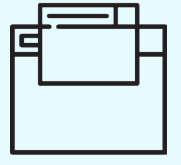
Contact Lookup



Queue Profiling



Journaling



Call Popping

Identify incoming MS Dynamics calls

Auto pop MS Dynamics contact on answer

Prioritise MS Dynamics leads in queue

The screenshot displays the Unity Agent interface for 'Jenna Wimshurst'. It includes a top navigation bar with icons for various functions. Below this is a 'My Statistics' table with columns for Name, Total Calls, Answered Calls, Missed Calls, Total Talk Time, Average Talk Time, Web Chats Received, Chats Answered, and Answered. A 'Contacts' panel on the left shows a search for 'george' with results for George Harrison, George Orwell (MS Dynamics), Jaik George, and Shan George. A 'New Phone Call' form is open, showing call information: Call From: Joe CRM, Call To: Gabriele Cannata (sample), Phone Number: 555407939, Direction: Outgoing, and Subject: Discuss Upgrade. A context menu is visible over the contact list with options like 'Answer call', 'Promote call', 'Transfer', 'Show agent activity', 'Reset column widths', and 'Show gridlines'.

Search MS Dynamics within Unity

Open MS Dynamics contact

Automatic call logging

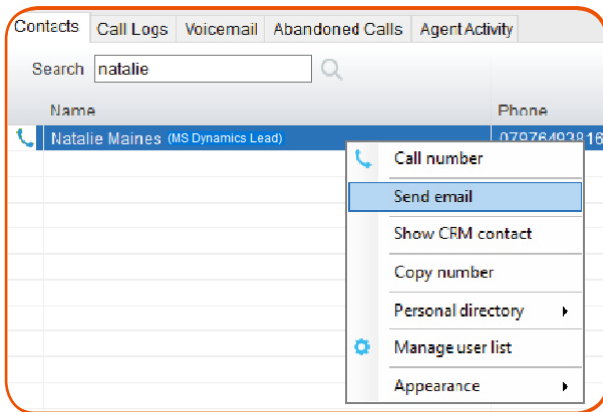
Collate Your Contacts With Unity & MS Dynamics  
Unity seamlessly integrates with MS Dynamics to facilitate contact lookup and “popping” for inbound and outbound calls, searching for CRM contacts within Unity and click to dial both from within Unity and the CRM platform.

Unity CRM Connect 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.



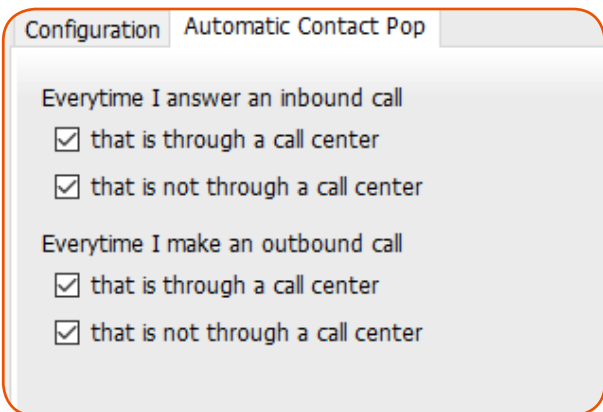
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## Key Features



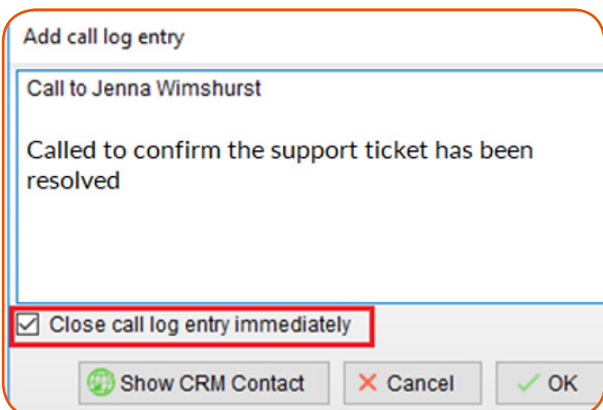
### Contact Search

Perform a contact search and Unity will not only check all directories such as the group/enterprise phone list, personal directory and Outlook etc, but it will also dynamically search your MS Dynamics contacts.



### Automatic Call Pop

When a CRM contact is called, the user can easily view the contact in the MS Dynamics platform. Unity can also be configured to automatically pop the CRM contact when the call is answered.



### 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.