

Configuring Unity with the CRM Dynamics Platform

This guide will outline the steps required to configure Unity to integrate with the Microsoft Dynamics CRM platform, as well as the features available once connected.

1 Installing the New Version of Unity

The first step is to uninstall the existing version of Unity, which contains the functionality to connect to the Dynamics CRM platform. This can be done by opening Windows Explorer and browsing to the Unity installation folder, which is C:\Program Files (x86)\Unity Client by default. In this folder you will find a file called Uninstall.bat, as shown below.

Computer > Local Di	isk (C·)	Program Files (v86) Inity Client		The second se	_
· · compater · cocaron	JAC (CI)				_
Include in library 🔻	Share	with Burn New folder			
es	<u></u>	Name	Date modified	Туре	Size
nloads] Brand	11/06/2017 19:51	File folder	
nt Places		Configuration	11/06/2017 19:51	File folder	
iync		Extensions	09/06/2017 11:53	File folder	
box (DRD)		퉬 Instant Message Log	09/06/2017 16:03	File folder	
top		퉬 Language	09/06/2017 17:34	File folder	
		🍌 Log	11/06/2017 19:51	File folder	
p		📔 QuickKey	11/06/2017 19:51	File folder	
ries		퉬 UnityConnect	09/06/2017 11:53	File folder	
cuments		🐌 Voicemail	09/06/2017 11:53	File folder	
isic		🛃 BlankBanner.bmp	12/12/2014 18:59	Bitmap image	36 KB
tures		🚳 cacls.bat	12/12/2014 19:15	Windows Batch File	1 KB
eos		cacls.exe	21/04/2010 22:27	Application	20 KB
earoun		Cacls_output.txt	09/06/2017 11:53	Text Document	3 KB
		🚳 caspol.bat	12/12/2014 19:15	Windows Batch File	1 KB
	Ε	CasPol.exe	29/11/2016 22:34	Application	105 KB
		🗟 caspol.exe.config	11/09/2013 17:50	XML Configuratio	1 KB
		aspol_output.txt	09/06/2017 11:53	Text Document	35 KB
		U ClickToDial.exe	09/06/2017 10:34	Application	761 KB
		ClickToDialSetupLog.txt	09/06/2017 16:25	Text Document	8 KB
		DirectoryConfiguration.xml	11/06/2017 19:51	XML File	1 KB
		IM.wav	12/08/2011 16:03	Wave Sound	5 KB
		InstallationSettings.xml	09/06/2017 11:48	XML File	1 KB
		Interop.IWshRuntimeLibrary.dll	19/10/2008 20:10	Application extens	48 KB
		🚳 Ionic.Zip.dll	14/03/2013 18:10	Application extens	452 KB
		📷 KakapoAgreement.rtf	15/10/2006 00:15	Rich Text Format	74 KB
		🚳 Matrix.dll	11/05/2015 15:54	Application extens	1,098 KB
		Microsoft.Crm.Sdk.Proxy.dll	05/11/2016 16:53	Application extens	273 KB
		Microsoft.IdentityModel.dll	01/11/2016 10:52	Application extens	1,078 KB
		Microsoft.Office.Interop.Outlook.dll	31/08/2009 02:00	Application extens	899 KB
		Microsoft.Xrm.Sdk.dll	05/11/2016 16:53	Application extens	526 KB
		🚳 NDde.dll	12/08/2011 15:44	Application extens	104 KB
		Newtonsoft.Json.dll	02/08/2016 09:37	Application extens	514 KB
		Newtonsoft.Json.xml	02/08/2016 09:37	XML File	511 KB
		🚳 office.dll	31/08/2009 02:00	Application extens	407 KB
		🚳 Uninstall.bat	09/06/2017 11:50	Windows Batch File	1 KB

Double click this file and confirm to uninstall Unity when prompted



Download the new version from:

Unity Desktop: <u>https://portal.unityclient.com/UpdateFiles/6785/UnityDesktop.msi</u> Unity Agent: <u>https://portal.unityclient.com/UpdateFiles/6785/UnityAgent.msi</u> Unity Supervisor: <u>https://portal.unityclient.com/UpdateFiles/6785/UnitySupervisor.msi</u> Unity Reception: <u>https://portal.unityclient.com/UpdateFiles/6785/UnityReception.msi</u>

The installer will remember the same settings that were used from the previous version of Unity.

In most browsers you will see the downloaded Unity installer at the bottom of the browser window, as shown below. If this is not the case and you aren't sure how to open the downloaded file, please contact IT support.

	орен
	Always open files of this type
	Show in folder
	Cancel
UnityDesktopWithmsi	1

When you open the downloaded file you will be prompted to confirm the installation, as below. Please note that additional prompts may be displayed and a password may need to be entered in order to proceed.

The installer will then guide you through a wizard to install Unity.

Once complete you can open Unity using the same shortcuts as before, and as mentioned Unity will start up using the same settings as last time.

2 Configuring Unity for Dynamics CRM

Now that you are using the latest version of Unity we can configure it to connect to Microsoft Dynamics. To do this open Settings, then click on the Settings tab, then CRM. You must ensure that the same details are entered for the different fields as they are in the screenshot below.

U Services & Settings	×
Services Settings	
Unity Settings Ortact Search Contact Display Current Calls	Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation.
Computer/Phone Integration Clipboard Integration Dialling Rule Costom Directory Integration Configuration	Configuration Automatic Contact Pop CRM Platform Dynamics
Outlook Integration Browser Integration GRM Cick To Dial	Online or Office 365 deployment Server address
Desktop Integration Notification Unity Connect Quick Keys Key Combinations Common of Common	Domain Login ID
Commands	

The login ID and Password fields must be completed using the exact same details that are used to log into Dynamics online, for example the login ID must include the domain@yourcompany.com. If you do not enter the server address as crm11 then the test will fail.

Include all contact types and choose to show the Dynamics record type (lead, account or contact). You can also choose to automatically add a call log entry, but they can be manually added whilst on a call.

Now click the Test button, this will check that Unity is able to connect to the Dynamics platform, if there is an error it will be displayed, but if the server address and login details are correct then you will be prompted that the test succeeded.

Please note that once the test has succeeded Unity will not allow the details to be changed, and CRM details cannot be saved unless a test has been performed successfully. This ensures that Unity will only attempt to integrate with the Dynamics platform once it is certain it is able to. Once the test has completed you will be notified and the settings will not be able to be changed.



You can now click OK to save the settings, Unity is now connected to the Dynamics platform, meaning you can perform searches for Dynamics contacts from within Unity, can view them in Dynamics, or send them an email [using the default mail client] if the email address is present in Dynamics.

Cor	ntacts Call Logs Voicemail	Abandoned Calls	Agent Activity		
S	earch Tutt	٩,			
	Name		Phone		ACD State
C	Alan Tutte (Dynamics Lead)		1872272900		
¢	Chris Tutt (Dynamics Lead - M	lobile)	07900575695	Call number	
C	Chris Tutt (Dynamics Lead)		020 8288 1248	Call Humber	
¢	Lauren Tutton (Dynamics Lea	ud)	0161 482 2300	Send email	
¢	Steve Tutt		02082881251	Show CRM contact	
				Show char contact	
				Copy number	

This will also show when showing contact information in the Active Call List or any other place where contact information is displayed

	То	Duration	Status	
Chris Tutt	Nicola Beauty Care (Dynamics Account)	00:02	Active/Not recording	
ontacts Call Logs Voicemail			My s	status: available in o
Contacts Call Logs Voicemail			My s	status: available in (💥 🤁 🔓
Contacts Call Logs Voicemail Missed calls Received calls Dialled calls Call Date	Phone Number		My s Name	status: available in i
Contacts Call Logs Voicemail Missed calls Received calls Dialled calls Call Date L206/2017 05.47/36	Phone Number 1642475716		My s Name Nicola Beauly Care (Dynamics Account)	status: available in 💥 🔐 💽
Contacts Call Logs Voicemail Voicemail Missed calls Received calls Dialled calls Call Date 12006/2017 08 47:36 9006/2017 16 29:21	Phone Number 1642475716 07900575695		My s Name Nicola Beauty Care (Dynamics Account) Chris Turl (Dynamics Contact)	status: available in X 🔁 💽
Contacts Call Logs Voicemail Missed calls Received calls Dialled calls Call Date 1206/2017 08.47.36 09/06/2017 16.29.21 0006/2017 16.29.21 1208/2013 1208/2013	Phone Number 1642475716 07900575695 0330002200		My s Name Nicola Beauly Care (Dynamics Account) Chris Tutt (Dynamics Contact) 03300022000	status: available in o
Contacts Call Logs Voicemail Image: State Sta	Phone Number 1642475716 07000575695 03300022000 01915005072		My s Name Nicola Beauly Care (Dynamics Account) Chris Tutt (Dynamics Contact) 03300022000 Nicola Jones (Dynamics Contact)	status: available in n

You can also add call log entries for calls by right-clicking the call in Unity

From	То	Duration	Status
Chris Tutt	Nicola Beauty Care (Dynamics Account)	Assign call to account code Add number to personal directory	Active/Not recording
		Show CRM contact Add CRM call log entry]
		Reset column widths	

Then entering a call note, which will be saved against that contact in Dynamics, please note that you can specify whether to close the phone call tasks or keep it open.



This phone call is saved in the activity list for the contact as shown below. Because the "Close call log entry immediately" checkbox was checked, the phone call item has been completed.



Lastly you are able to automatically pop the Dynamics contact as you answer an inbound call from a Dynamics contact, or the Dynamics contact answers a call from you. This is configured back in Settings as shown below.

U Services & Settings		×
Services Settings	Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation. Configuration Automatic Contact Pop Everytime I answer an inbound call 	
	× Cancel	ок

More information on the functionality available with the Unity CRM Connector can be found in section 3 of this document <u>https://www.kakaposystems.com/files/Unity-CRM-Integration-Configuration.pdf</u>. This includes the ability to automatically add phone call entries in Dynamics as phone calls are made, received or missed to/from Dynamics contacts.