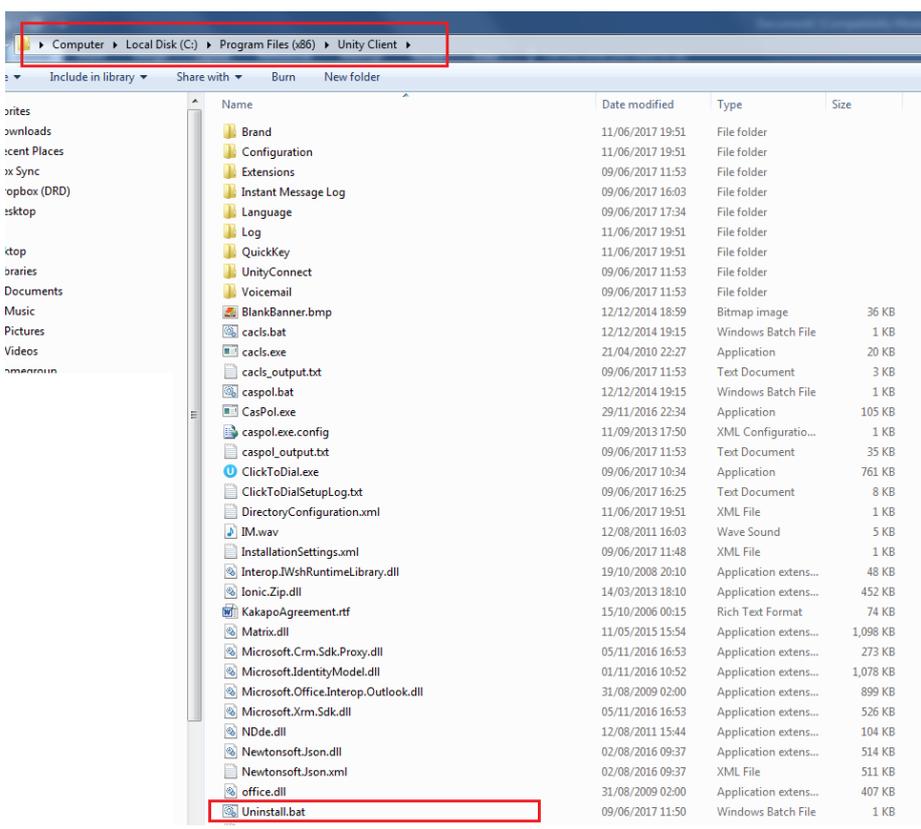


Configuring Unity with the CRM Dynamics Platform

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.



Double click this file and confirm to uninstall Unity when prompted



Download the new version from:

Unity Desktop: <https://portal.unityclient.com/UpdateFiles/6785/UnityDesktop.msi>

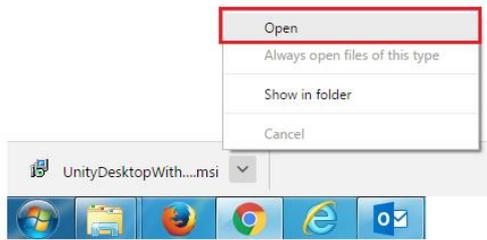
Unity Agent: <https://portal.unityclient.com/UpdateFiles/6785/UnityAgent.msi>

Unity Supervisor: <https://portal.unityclient.com/UpdateFiles/6785/UnitySupervisor.msi>

Unity Reception: <https://portal.unityclient.com/UpdateFiles/6785/UnityReception.msi>

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.



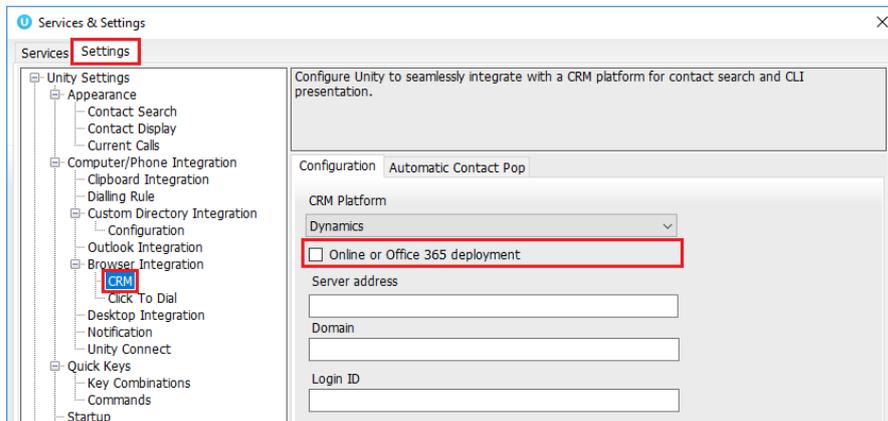
When you open the downloaded file you will be prompted to confirm the installation, as below. Please note that additional prompts may be displayed and a password may need to be entered in order to proceed.

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.

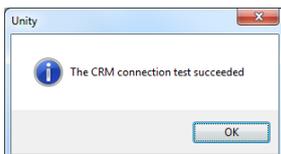


The login ID and Password fields must be completed using the exact same details that are used to log into Dynamics online, for example the login ID must include the domain@yourcompany.com. If you do not enter the server address as crm11 then the test will fail.

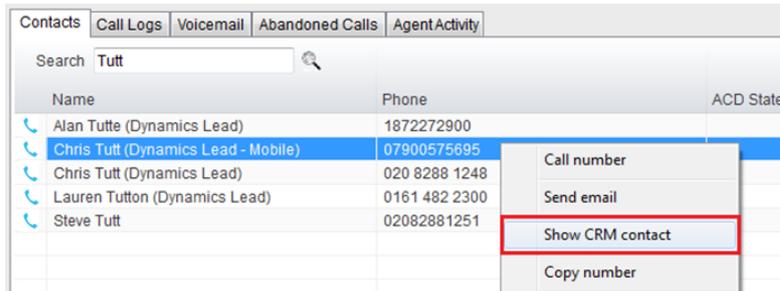
Include all contact types and choose to show the Dynamics record type (lead, account or contact). You can also choose to automatically add a call log entry, but they can be manually added whilst on a call.

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.

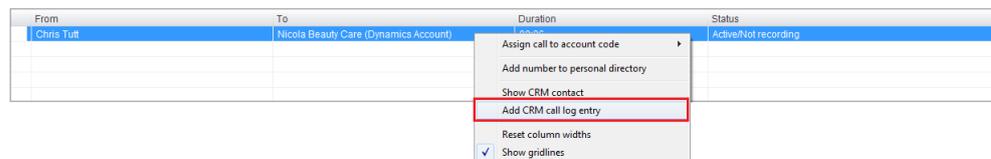


This will also show when showing contact information in the Active Call List or any other place where contact information is displayed

From	To	Duration	Status
Chris Tutt	Nicola Beauty Care (Dynamics Account)	00:02	Active/Not recording

Call Date	Phone Number	Name
12/06/2017 08:47:36	1642475716	Nicola Beauty Care (Dynamics Account)
09/06/2017 16:29:21	07900575695	Chris Tutt (Dynamics Contact)
09/06/2017 15:01:33	03300022000	03300022000
09/06/2017 14:00:55	01915005072	Nicola Jones (Dynamics Contact)
09/06/2017 14:00:41	03303339293	03303339293

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



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.

Call to Jenna Wimshurst

Wants to know where we are with the contract, said we would get it over tomorrow morning

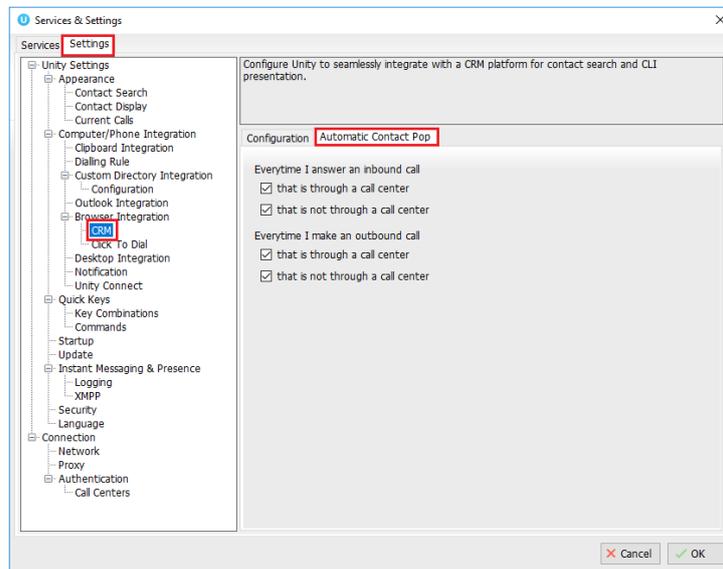
Close call log entry immediately

Show CRM Contact Cancel OK

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.

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.

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.



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