

mashr

UNITY MS DYNAMICS INTEGRATION

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 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 Unity Application Suite

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



Click-to-Dial



Contact Lookup



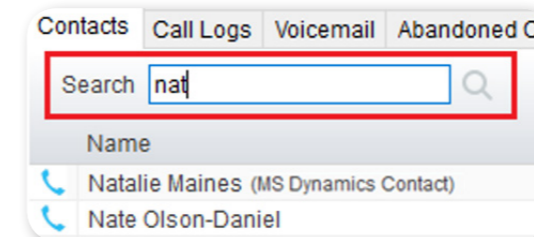
Queue Profiling



Journaling



Call Popping



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

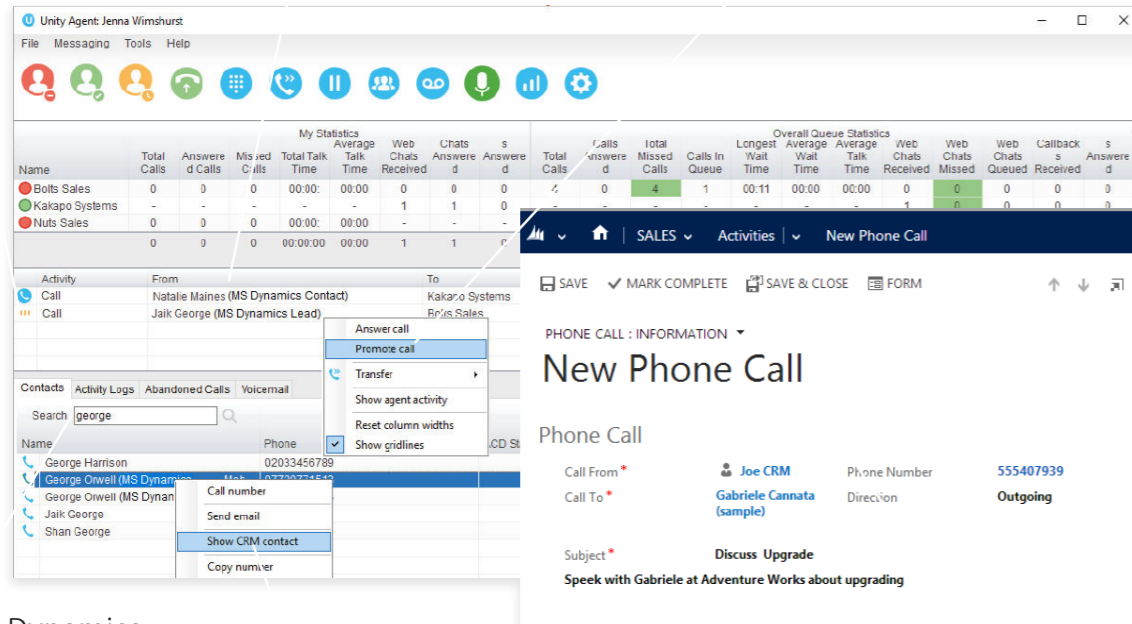
The user can easily view the contact in MS Dynamics and Unity can also be configured to automatically pop the CRM on answer.

MS DYNAMICS INTEGRATION

Identify incoming MS Dynamics calls

Auto pop MS Dynamics contact on answer

Prioritize MS Dynamics leads in queue



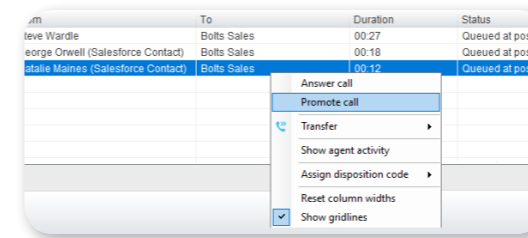
Search MS Dynamics within Unity

Open MS Dynamics contact

Automatic call logging

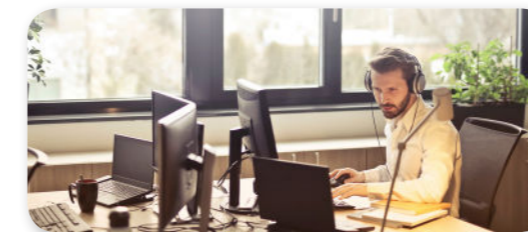
Do it once and get it right first time. Unity's MS Dynamics integration completely unifies all customer contact, including calls, emails, chats and tweets at a user level within MS Dynamics.

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.



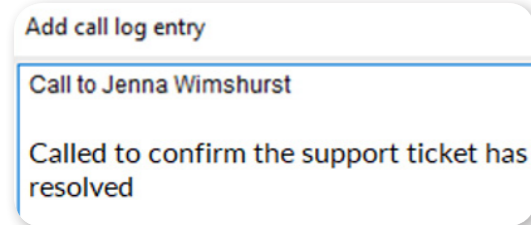
Prioritizing Queued Calls

- o Prioritize Contacts in Queue
- o Transfer Dynamics Users to VIP Queue
- o Intelligently manage Important Calls



Click To Dial

- o Click To Dial From Within MS Dynamics
- o Turn Web Chats Into Calls Instantly
- o Flexibility For Ad-hoc Dialling



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

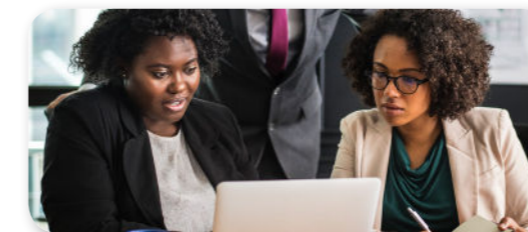
Set your presence to alert colleagues to your current availability. Predefine routing, such as diverting calls to your mobile if you are out of the office.

Activity	From
WebChat	Natalie Maines (CRM Contact)
Email	Jenna Wimshurst
Tweet	John Daniels (CRM Contact)
Callback	Megan Rapinoe
Call	Benedict Hutton



Multi-Channel Integration

- o Web Chat & Email Profiling
- o View Previous CC Conversations
- o Screen Popping On All Media



Automatic Call Journaling

- o Log All Calls & Web Chats & Emails
- o Manually Edit Automatic Log Entries
- o View Full Transcripts in MS Dynamics