

Dynamics 365 - Kaizala Connector

Table of Contents

1.1	Kaizala.....	3
1.1.1	Introduction	3
1.1.2	How It work.....	3
1.1.3	Management Portal	3
1.2	Installation of Kaizala.....	5
1.3	Configuration Part	9
1.4	Kaizala Features.....	13
1.4.1	Creation of Groups.....	13
1.4.2	Kaizala – Dynamics 365 integration	15
1.5	License/ Registration	24

1.1 Kaizala

1.1.1 Introduction

Kaizala is a mobile app and service designed for large group communications and work management. Kaizala makes it easy to connect and coordinate work with your entire value chain, including field employees, vendors, partners, and customers wherever they are. With Kaizala you efficiently assign and track tasks or collect data with individuals or large groups—even if they're not within your organization.

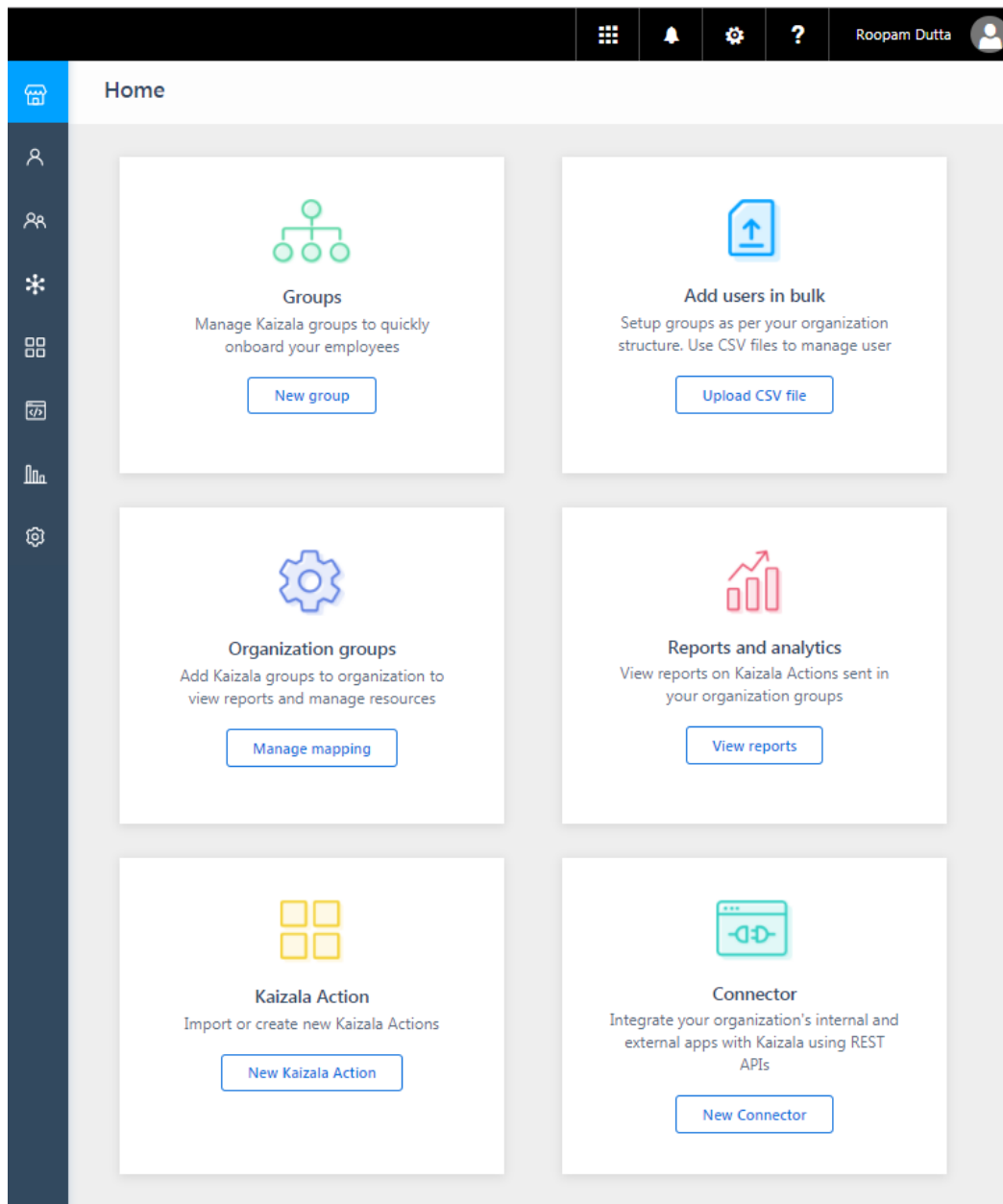
1.1.2 How It work

Kaizala is a mobile app and service that helps you communicate and coordinate work with large groups of people, even if they're not part of your organization. Coordinate frequently-used tasks with built-in "Actions," which work like "mini apps" for common workflow scenarios. Some examples of built-in Actions are: assign jobs, conduct polls and surveys, or share attachments. With a unique groups-within-groups structure, you can easily set up Kaizala to mirror your organization's hierarchy.

1.1.3 Management Portal

The Kaizala management portal is a web based portal that provides management, reporting and extensibility capabilities for Kaizala. With the Kaizala management portal, your organization can quickly on board thousands or millions of users to Kaizala, including employees, partners, vendors, or customers, with just phone number. You can create Kaizala groups and add users, and also view out-of-the-box reports for Kaizala Actions such as Jobs and Surveys.

Kaizala Mobile Application

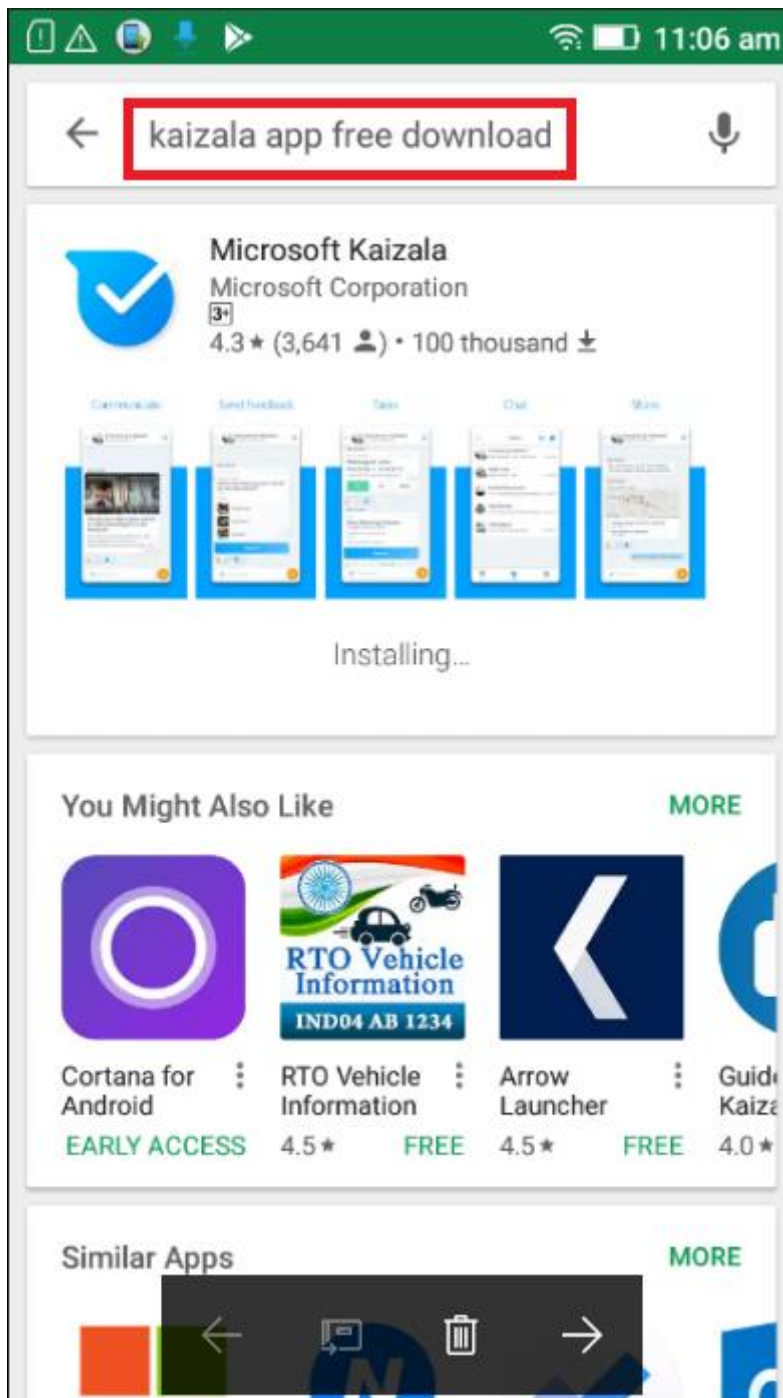


1.2 Installation of Kaizala

Kaizala can simply be installed on mobile from playstore.

Steps to follow: 1.) Enter 'kaizala app free download' in the playstore search box.

2.) Kaizala gets downloaded and installed successfully.



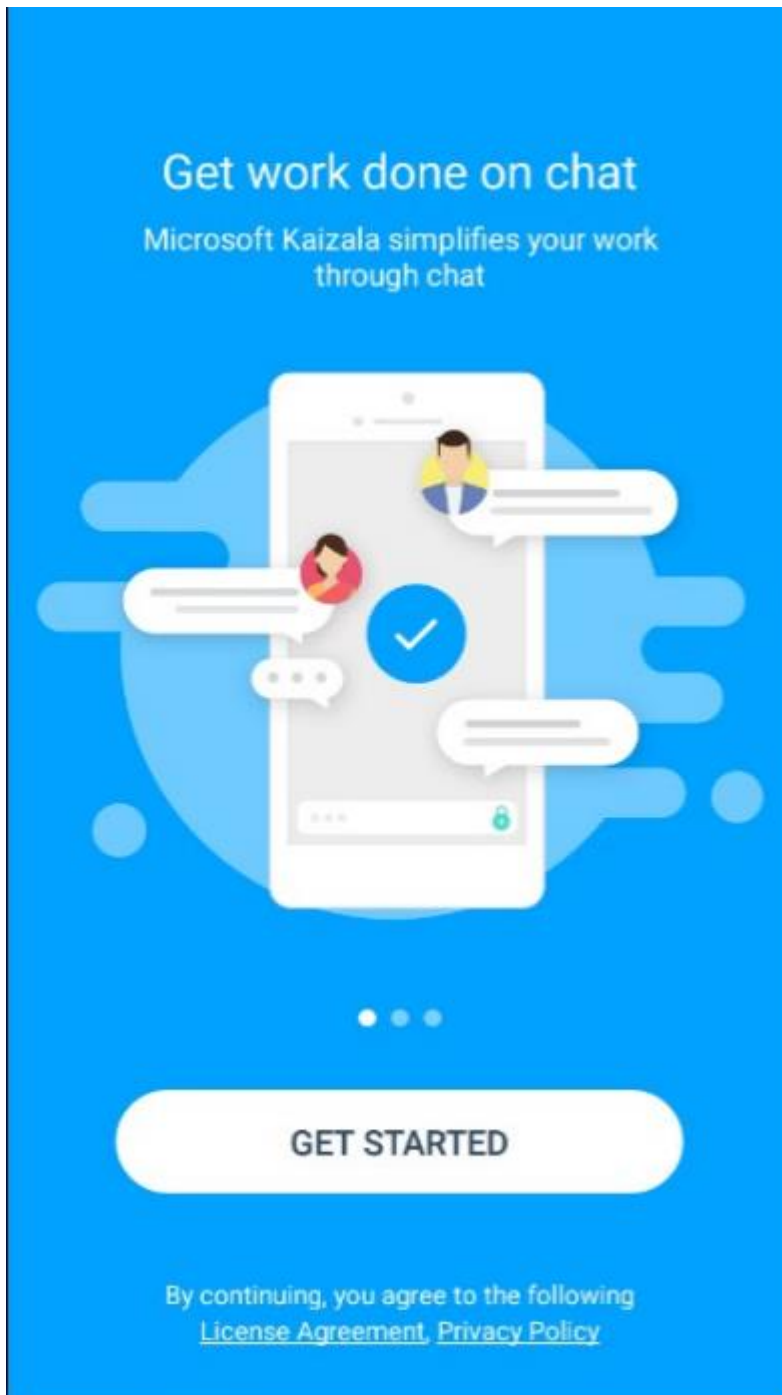
Kaizala - Get Started with Kaizala

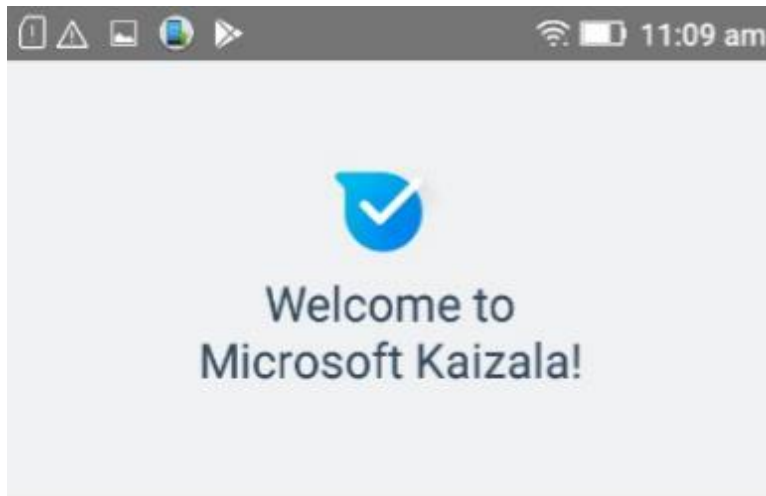
Kaizala Mobile Application

Steps to follow: 1.) The kaizala UI looks as below.

2.) Enter the number for a verification code and click on next button.

3.) Provide the verification code.





Pragmasys

+91 India

XXXXXXXXXX

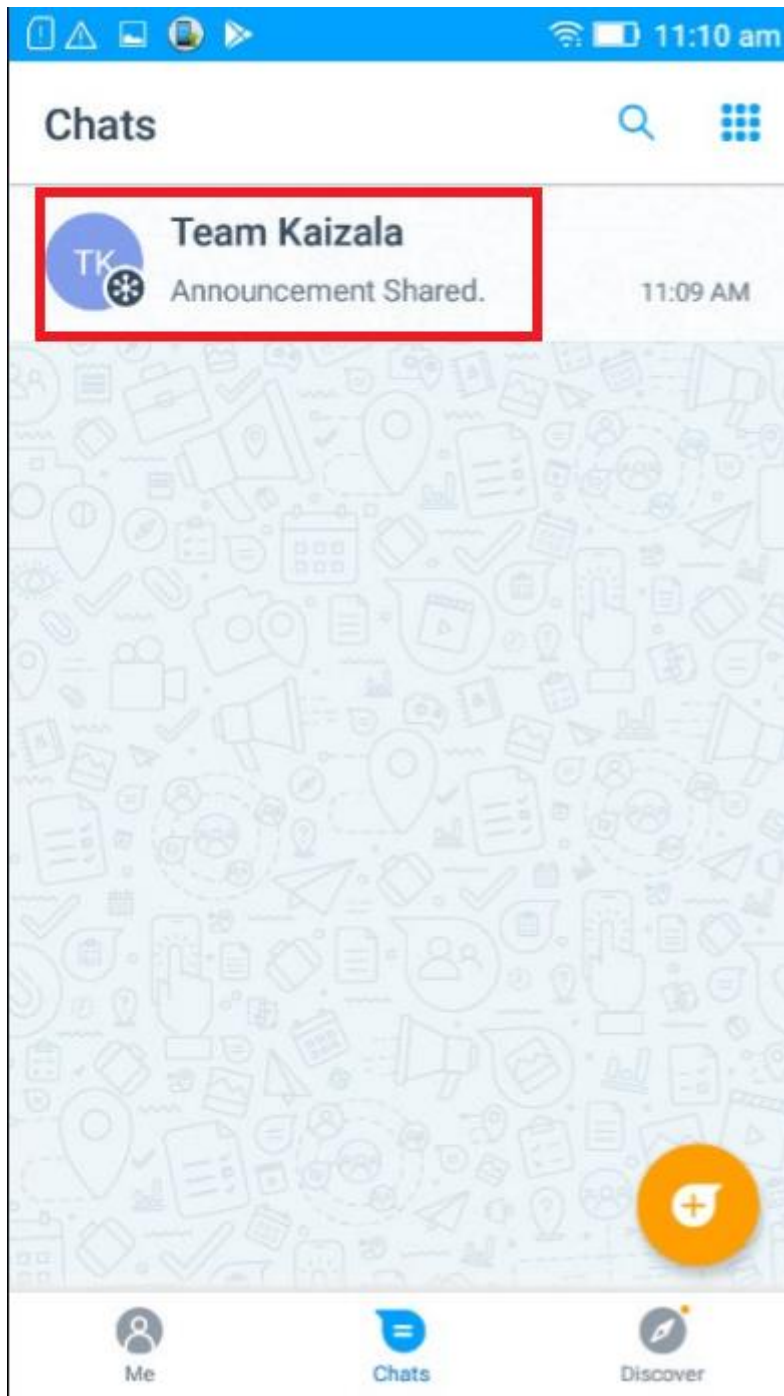
We will send you an SMS to verify this number

[Privacy Statement](#)

Enter a valid
number

NEXT

Kaizala Mobile Application



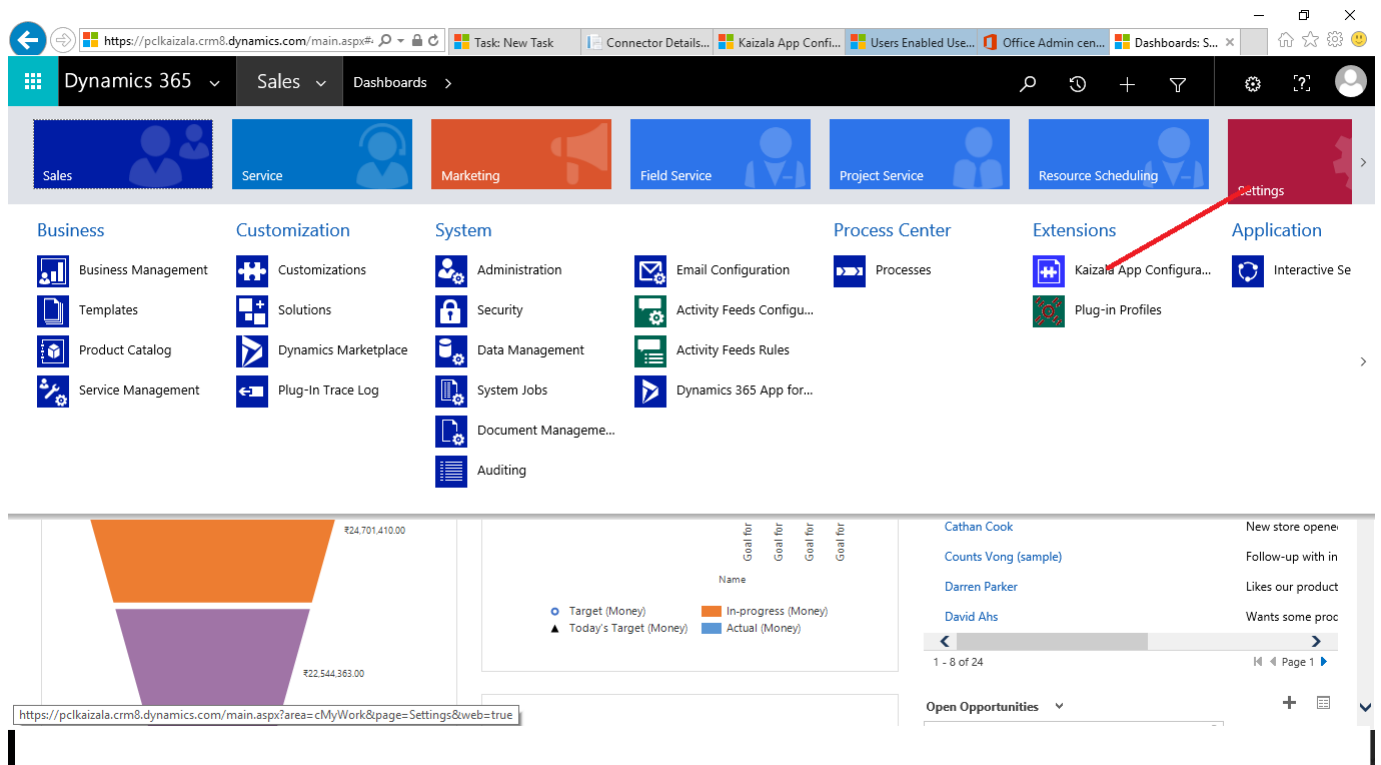
Kaizala Mobile Application

1.3 Configuration Part

To establish a connection between CRM and kaizala below configuration needs to be done:

Steps to configure: 1.) Click on Settings → Kaizala App Configuration

2.) Click on '+' button



The screenshot shows the Dynamics 365 Settings page. The 'Settings' tab is selected in the top navigation bar. In the 'Extensions' section, 'Kaizala App Configuration' is highlighted with a red arrow. The page shows various configuration options under categories like Business, Customization, System, Process Center, Extensions, and Application. A sidebar on the left contains a funnel chart and a table of data.

Funnel Chart Data:

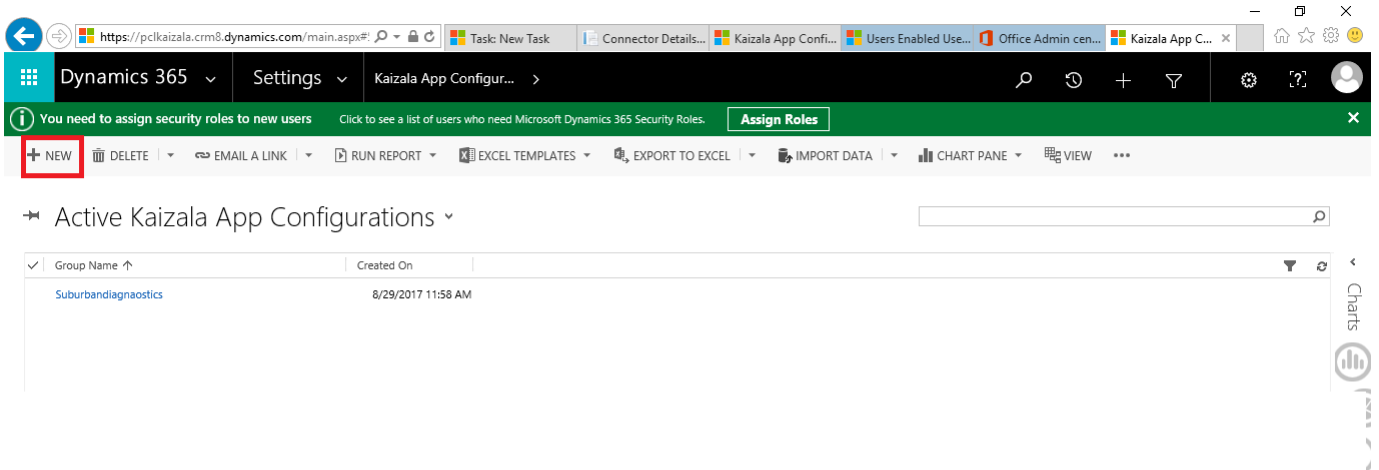
Category	Value
Top (Orange)	₹24,701,410.00
Bottom (Purple)	₹22,544,363.00

Table Data:

Name	Target (Money)	In-progress (Money)	Today's Target (Money)	Actual (Money)
Cathan Cook				
Counts Vong (sample)				
Darren Parker				
David Ahs				

The URL in the address bar is: <https://pclkaizala.crm8.dynamics.com/main.aspx?area=cMyWork&page=Settings&web=true>

Kaizala Mobile Application



https://pclkaizala.crm8.dynamics.com/main.aspx#

Task: New Task | Connector Details... | Kaizala App Confi... | Users Enabled Use... | Office Admin cen... | Kaizala App C...

Dynamics 365 | Settings | Kaizala App Configur... >

You need to assign security roles to new users. Click to see a list of users who need Microsoft Dynamics 365 Security Roles. [Assign Roles](#)

+ NEW | DELETE | EMAIL A LINK | RUN REPORT | EXCEL TEMPLATES | EXPORT TO EXCEL | IMPORT DATA | CHART PANE | VIEW

Active Kaizala App Configurations

Group Name ↑	Created On
Suburbandiagnosics	8/29/2017 11:58 AM

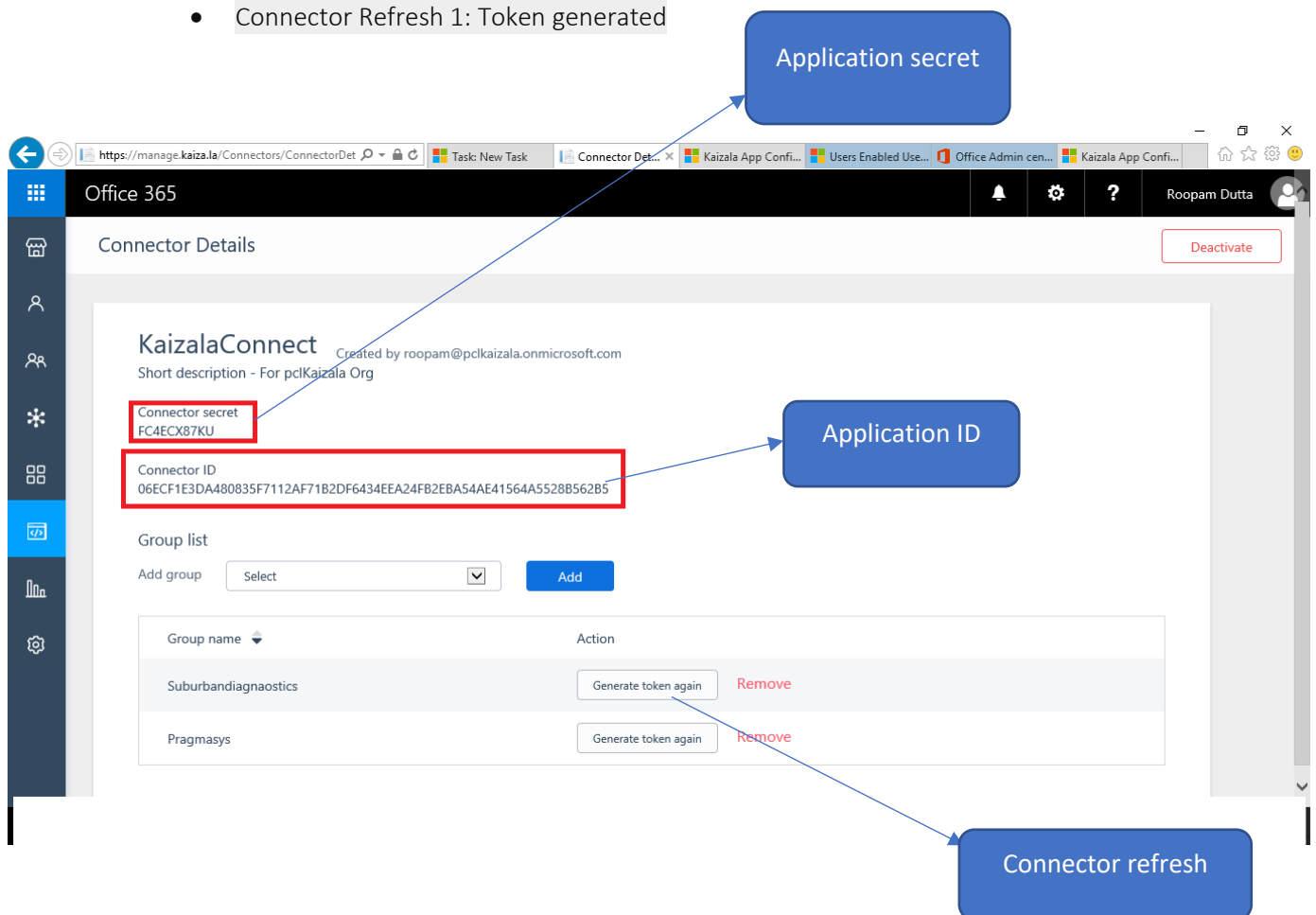
Charts

Kaizala Mobile Application

CONFIGURATION DETAILS:

Specify the below configuration details:

- Group Name: Can be any name
- Group Id: Kaizala group GUID
- Kaizala Connector Name: Can be any name
- Application Id: Connector's ID
- Application secret: Connector secret
- Connector Refresh 1: Token generated



Office 365

Connector Details Deactivate

KaizalaConnect Created by roopam@pclkaizala.onmicrosoft.com
 Short description - For pclKaizala Org

Connector secret
 FC4ECX87KU

Connector ID
 06ECF1E3DA480835F7112AF71B2DF6434EEA24FB2EBA54AE41564A5528B562B5

Group list

Add group

Group name	Action
Suburbandiagnosics	<input type="button" value="Generate token again"/> Remove
Pragmasys	<input type="button" value="Generate token again"/> Remove

Kaizala Mobile Application

Provide the details and the save the record.

<https://pclkaizala.crm8.dynamics.com/main.aspx?&...>

Task: New Task | Connector Details... | Kaizala App Co... x | Users Enabled Use... | Office Admin cen... | Kaizala App Config...

Dynamics 365 | Settings | Kaizala App Configur... > Suburbandiagnaoistics

+ NEW | DEACTIVATE | DELETE | EMAIL A LINK | RUN WORKFLOW | START DIALOG | WORD TEMPLATES | RUN REPORT | FORM EDITOR

KAIZALA APP CONFIGURATION : INFORMATION

Suburbandiagnaoistics

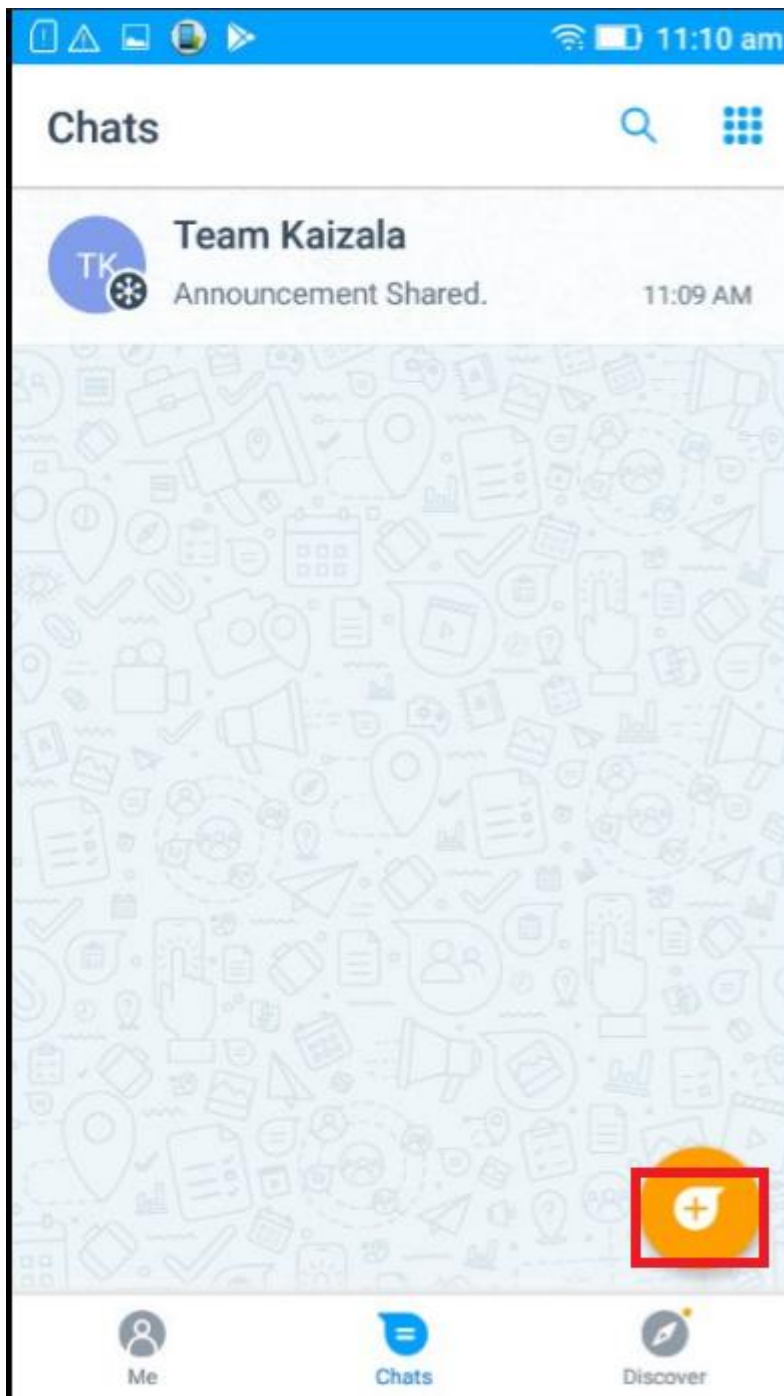
General

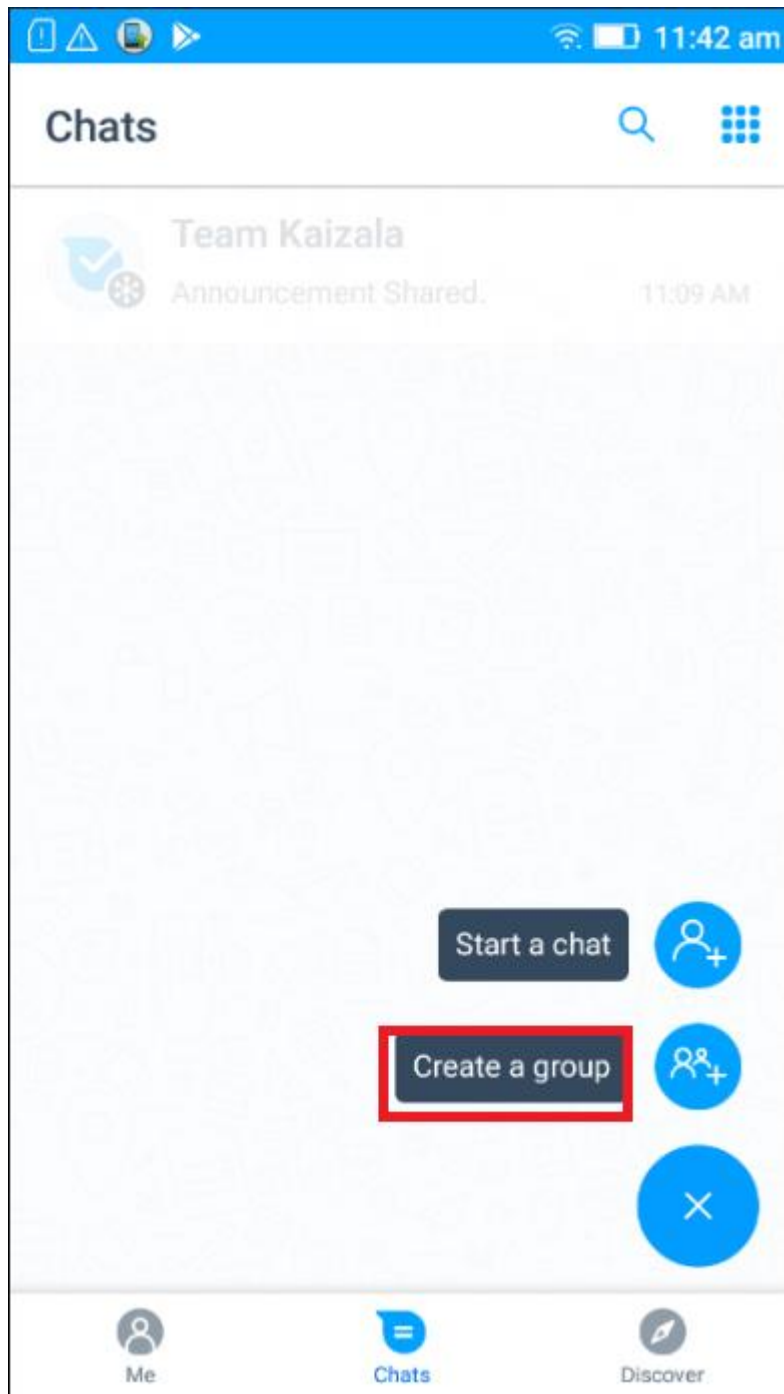
Group Name *	Suburbandiagnaoistics
Group ID *	06e80815-748e-439b-8c7e-d5001412cbe7
Kaizala Connector Na	Suburbandiagnaoistics
Application ID *	06ECF1E3DA480835F7112AF71B2DF6434EEA24FB2EBA54AE41564A55288562B5
Application Secret *	FC4ECX87KU
Connector Refresh 1 *	eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXCVJ9IjEcm46bWljcm9zb2Z0OmcNyZWYlbnRpYWxzIjoie1wicGhvbmVodWw1Zicucjplcis5MTk3MTMzMjMTMxNDVclxcmlmNFZwiOlwiXClsJCJOZXN0U2VuZGVyXCli6XCMjYmVwZSVwLWFiYWYXIl

1.4 Kaizala Features

1.4.1 Creation of Groups

Steps to be followed: 1.) With Kaizala one can create groups, click on the '+' button present
2.) Create a group

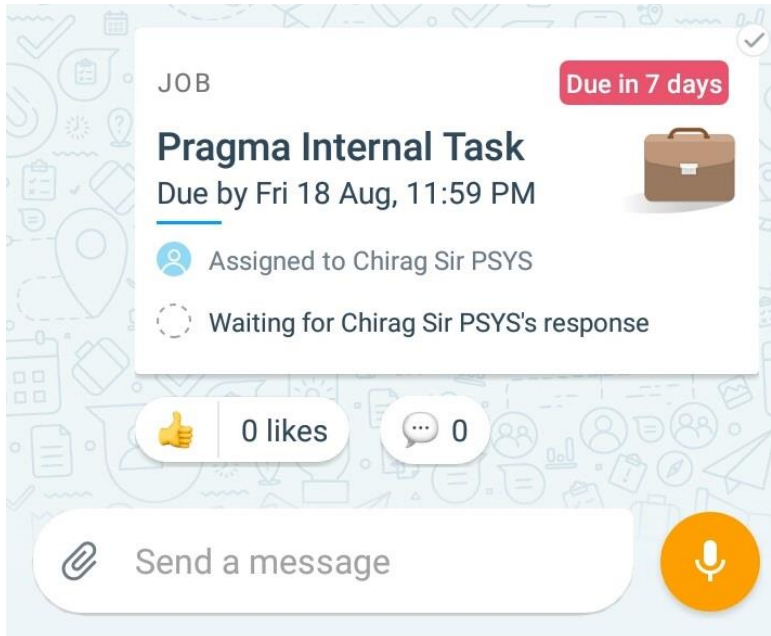




Kaizala Mobile Application

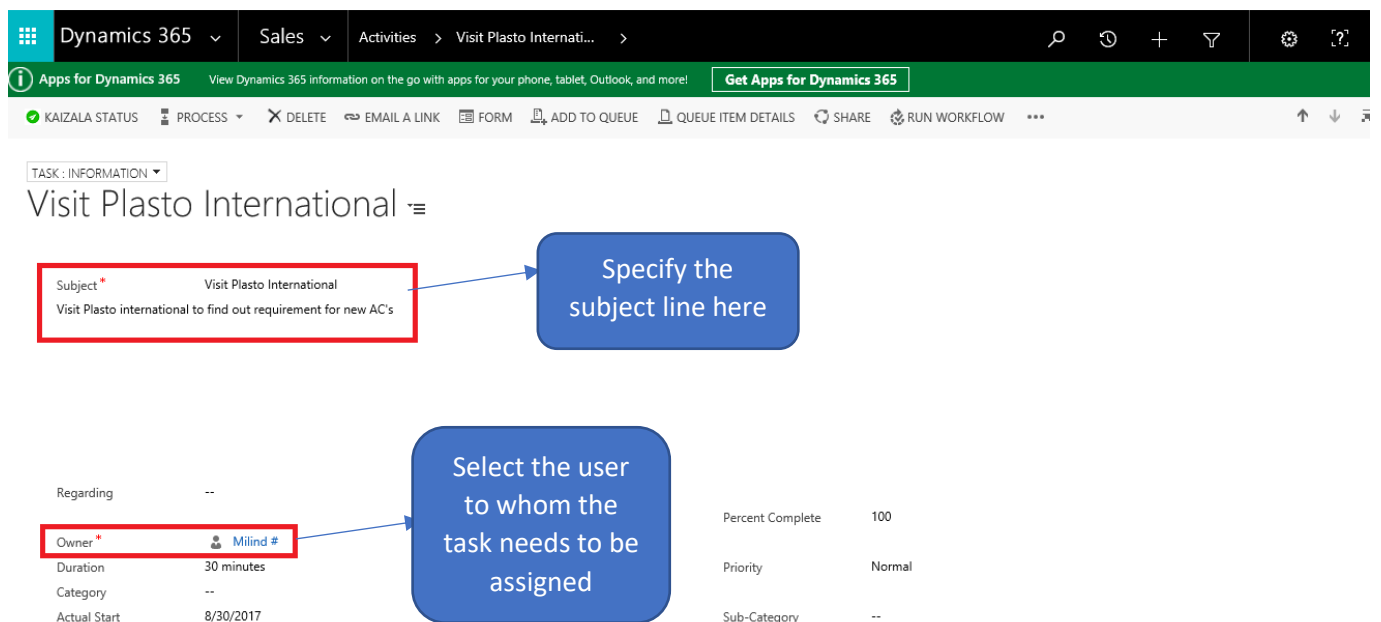
1.4.2 Kaizala – Dynamics 365 integration

Assign jobs to people and track completion status



Steps: How the integration flow works

Steps: 1.) Create a task from CRM

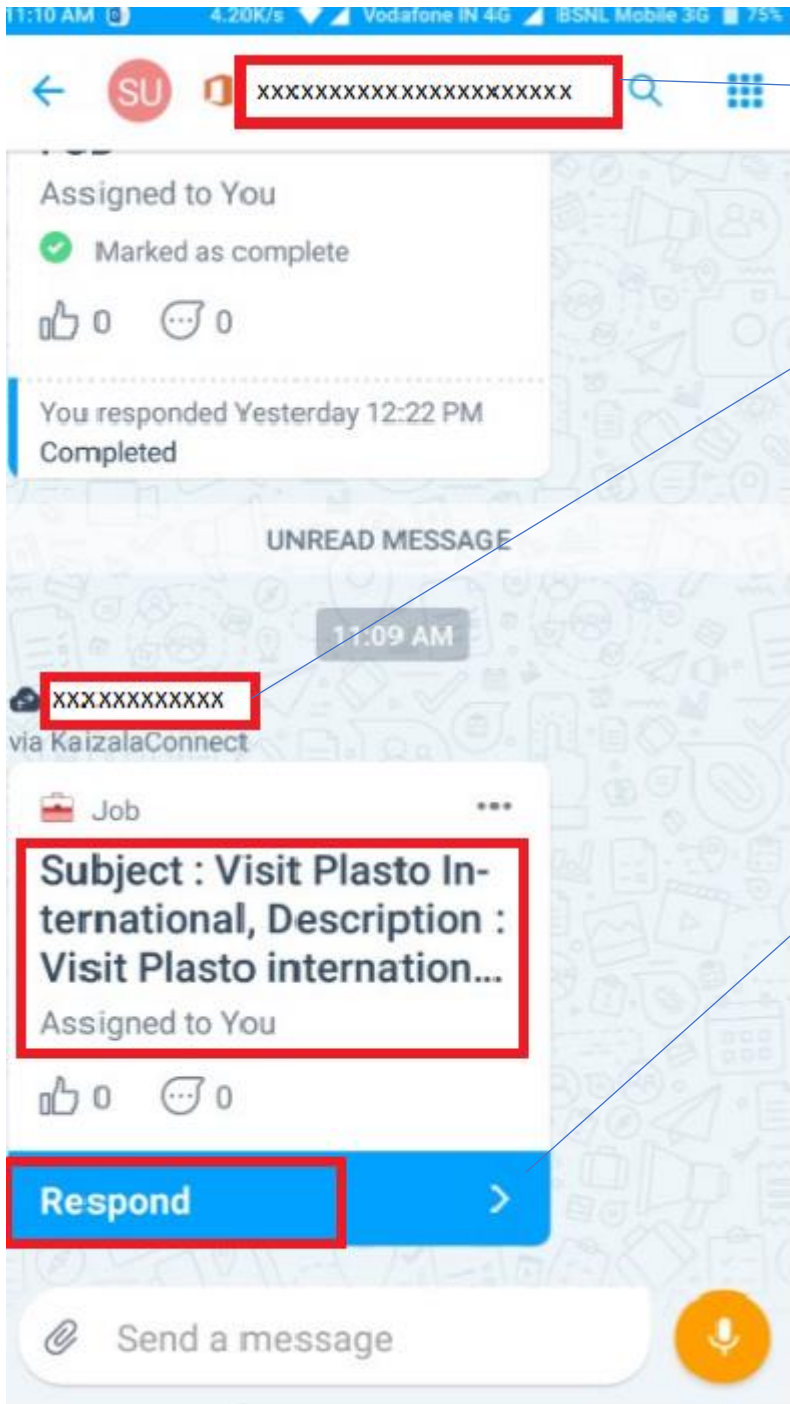


The screenshot shows the Dynamics 365 interface for a task titled "Visit Plasto International". The task is in the "Activities" section. The "Subject" field is highlighted with a red box and an annotation: "Specify the subject line here". The "Owner" field is also highlighted with a red box and an annotation: "Select the user to whom the task needs to be assigned". The "Owner" field shows "Milind #". Other fields include "Duration" (30 minutes), "Category" (---), "Actual Start" (8/30/2017), "Percent Complete" (100), "Priority" (Normal), and "Sub-Category" (---).

Kaizala Mobile Application

After the task is been created in CRM, a notification gets triggered to the user provided if the user is kaizala registered user.

Click on Respond button highlighted below to update the status



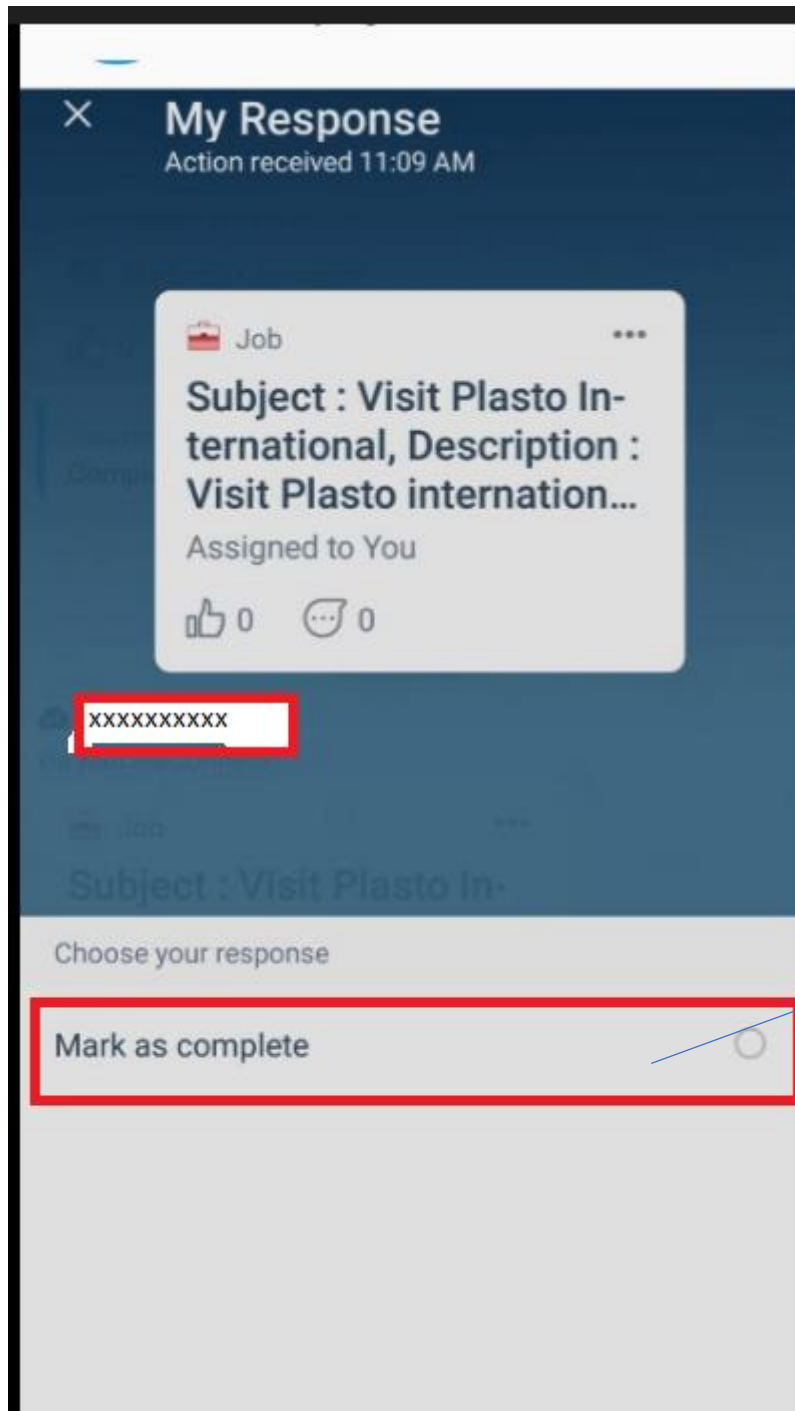
The screenshot shows the Kaizala mobile application interface. At the top, there is a status bar with the time 11:10 AM, signal strength, and battery level. Below the status bar, there is a navigation bar with a back arrow, a red circle with 'SU', and a search bar containing 'XXXXXXXXXXXXXXXXXXXX'. To the right of the search bar is a grid icon. A blue arrow points from the grid icon to a blue box labeled 'Name of the group'. Below the navigation bar, there is a section titled 'Assigned to You' with a green checkmark and the text 'Marked as complete'. Below this, there is a section titled 'You responded Yesterday 12:22 PM Completed'. Below this, there is a section titled 'UNREAD MESSAGE' with a timestamp '11:09 AM'. Below this, there is a section titled 'XXXXXXXXXXXX' with a timestamp '11:09 AM' and the text 'via KaizalaConnect'. Below this, there is a section titled 'Job' with a red box around the text 'Subject : Visit Plasto International, Description : Visit Plasto internation...'. Below this, there is a section titled 'Assigned to You' with a red box around the text 'Respond'. A blue arrow points from the 'Respond' button to a blue box labeled 'Click on Respond button'. Below the 'Respond' button, there is a section titled 'Send a message' with a microphone icon.

Annotations:

- Name of the group
- Notifies the user
- Click on Respond button

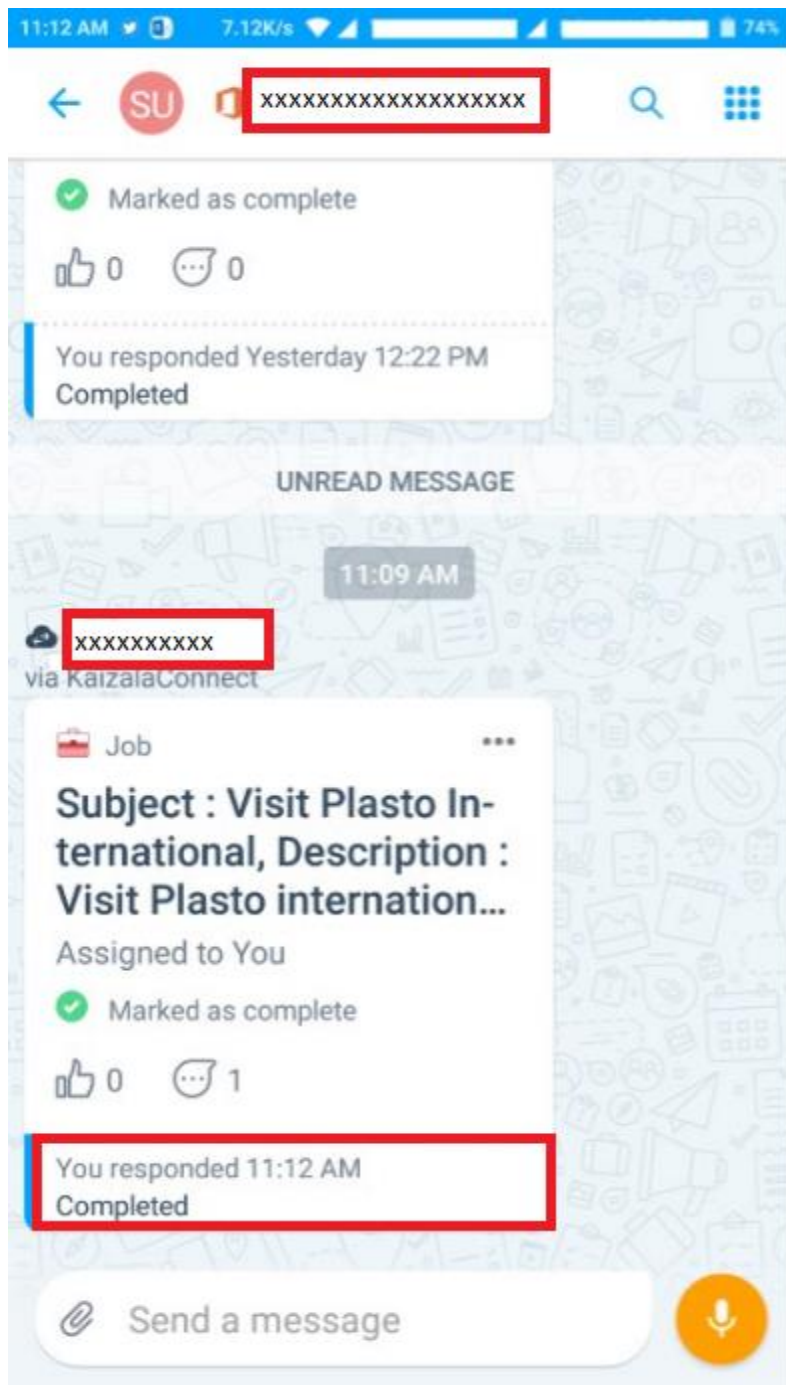
Kaizala Mobile Application

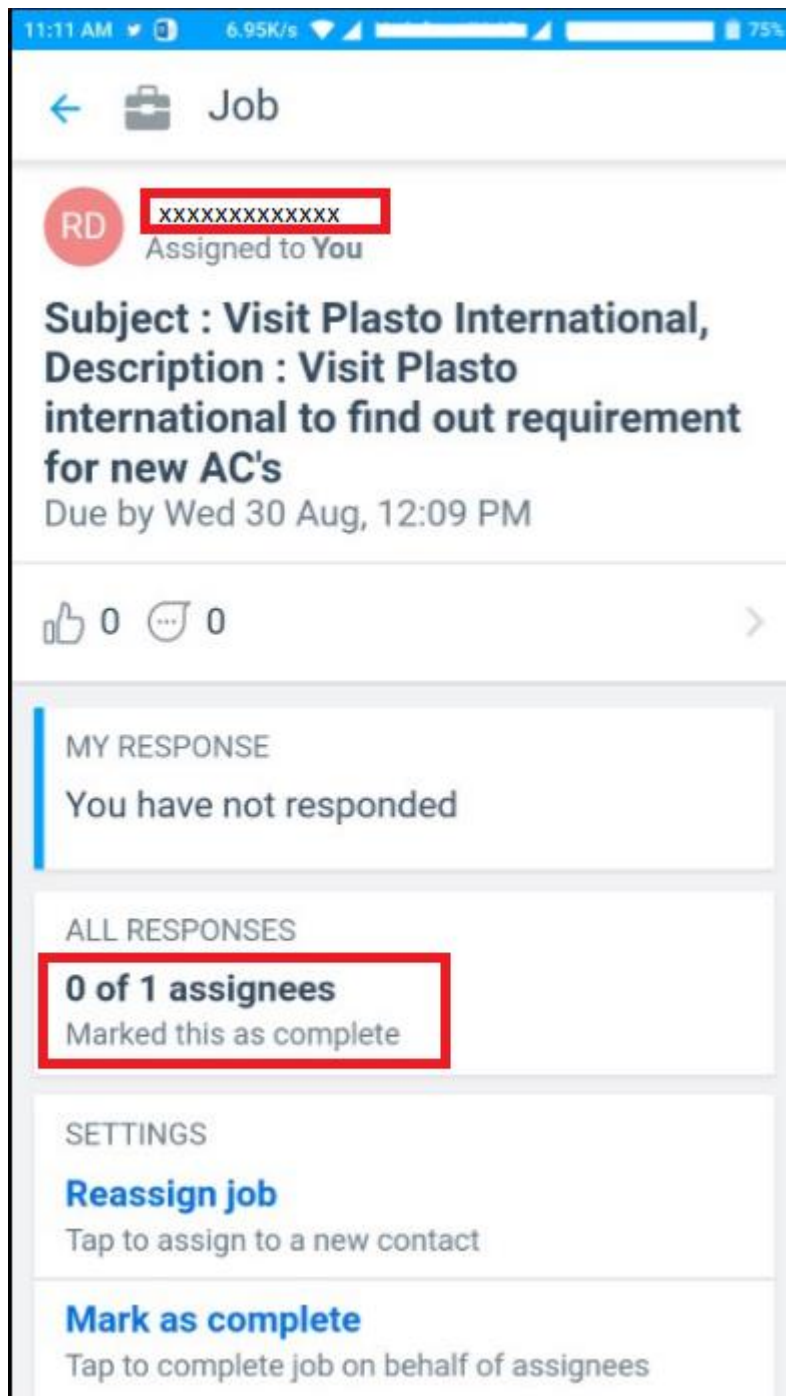
Click on the complete button

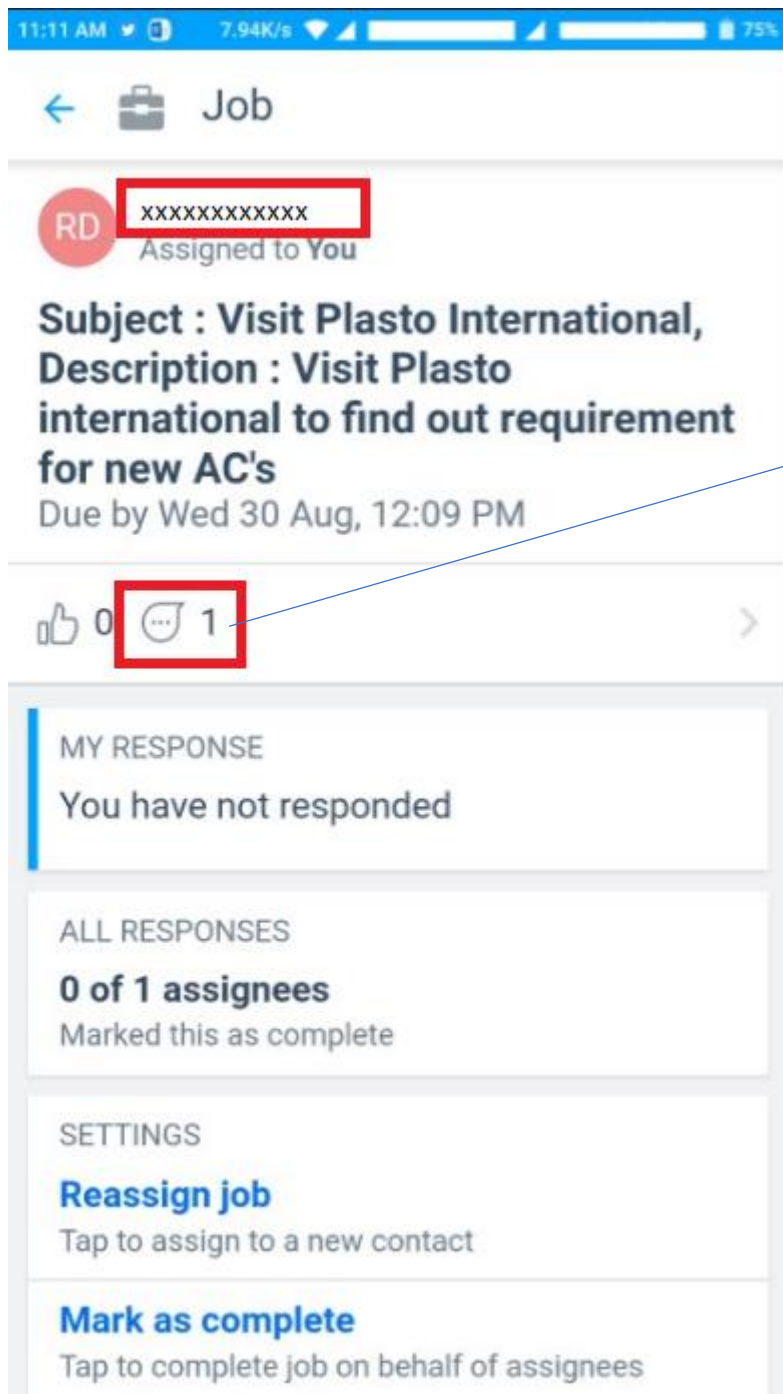


Click on complete
button

Kaizala Mobile Application



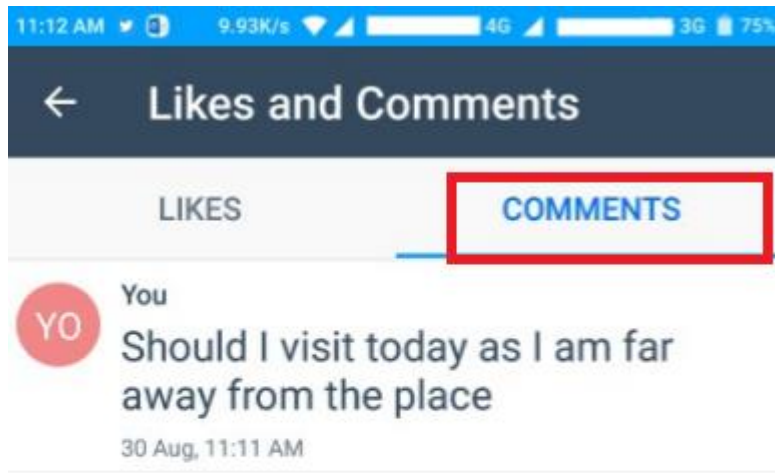




Click here to share
a comment

Kaizala Mobile Application

Click on the comment option



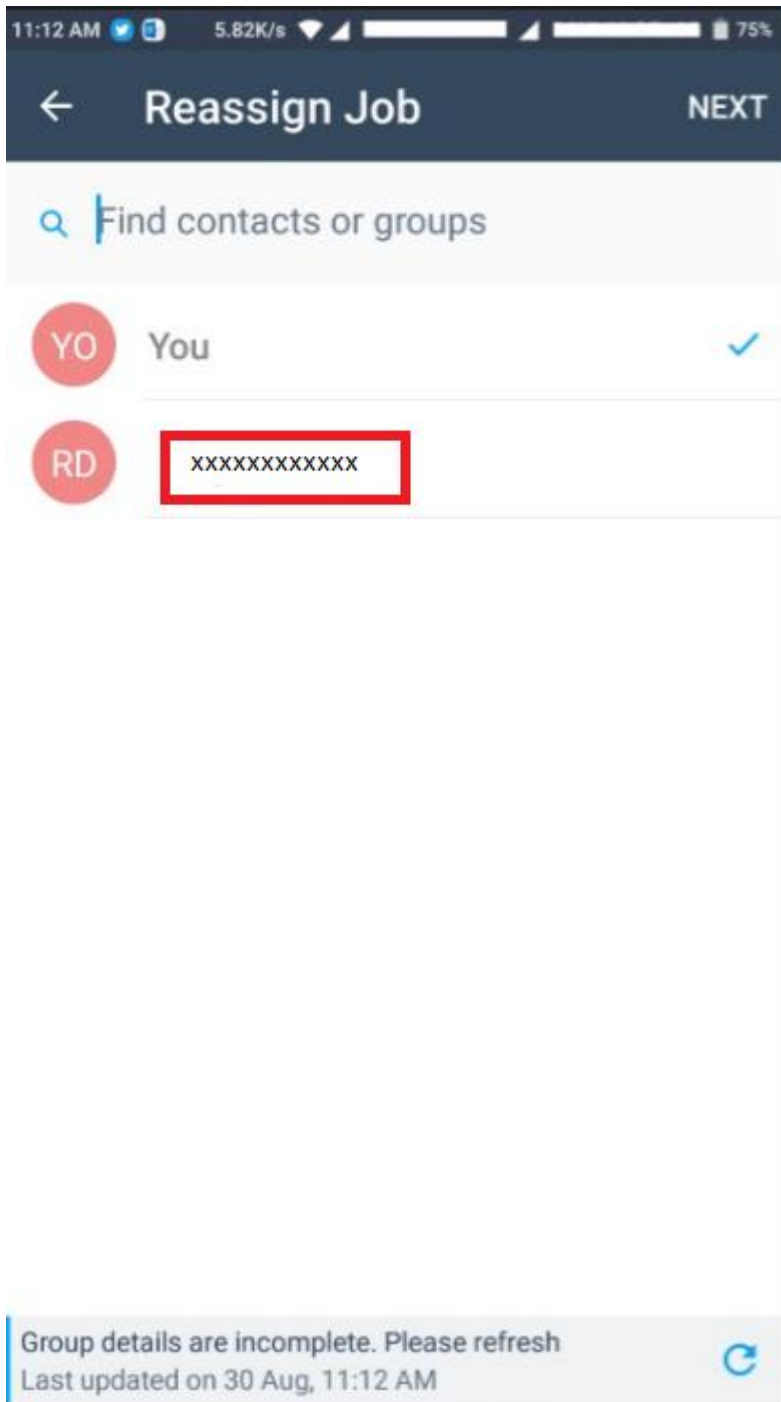
Share a comment and
press enter

Write a comment ...



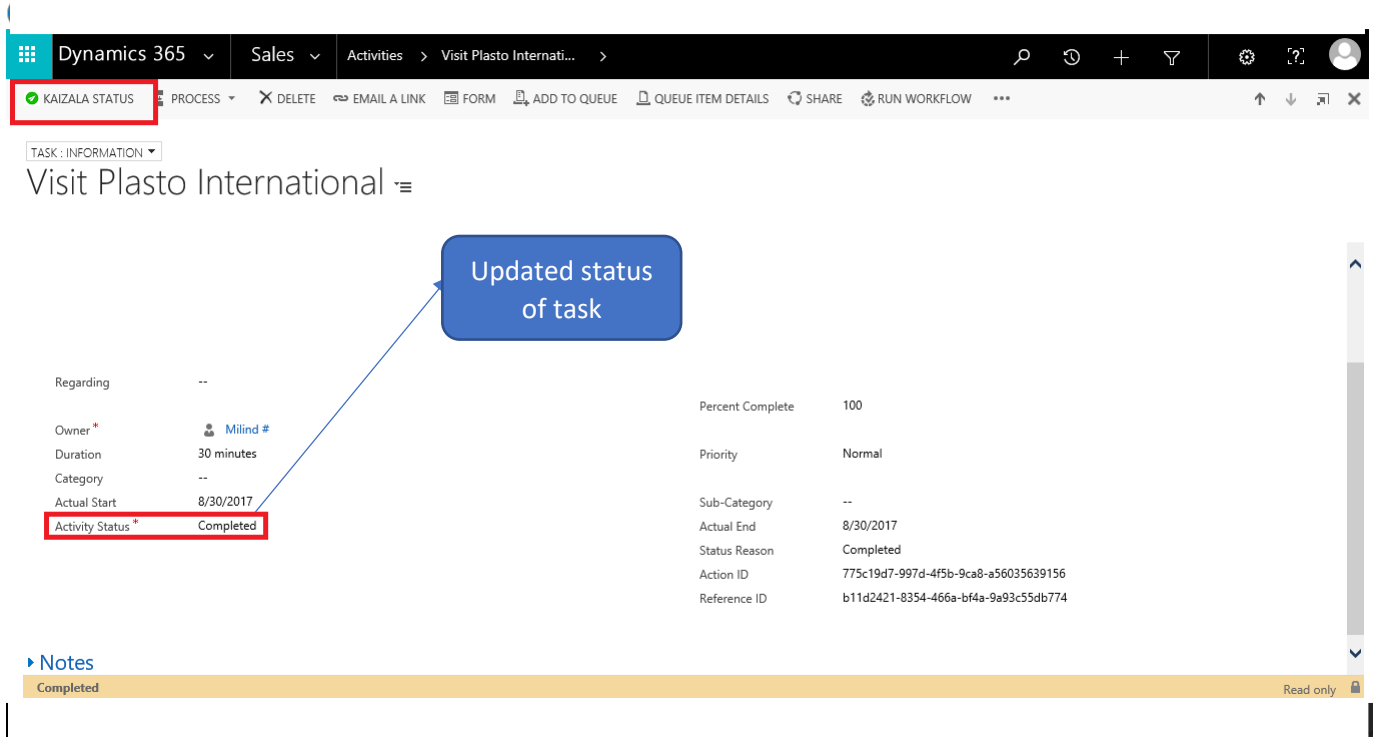
Kaizala Mobile Application

Additionally, the you can also find the registered users available on kaizala application



Kaizala Mobile Application

Once a task is updated in kaizala, the status of the same task also gets updated in CRM.



Updated status of task

Regarding	--	Percent Complete	100
Owner*	Milind #	Priority	Normal
Duration	30 minutes	Sub-Category	--
Category	--	Actual End	8/30/2017
Actual Start	8/30/2017	Status Reason	Completed
Activity Status *	Completed	Action ID	775c19d7-997d-4f5b-9ca8-a56035639156
		Reference ID	b11d2421-8354-466a-bf4a-9a93c55db774

Notes
Completed Read only

NOTE: The status of the tasks can be automatically updated using Pragmasys's Workflow scheduler. Refer the following link for download.

https://appsource.microsoft.com/en-us/product/dynamics-365/pragmasys.pragmasys_workflowscheduler?pub_source=email&pub_status=success

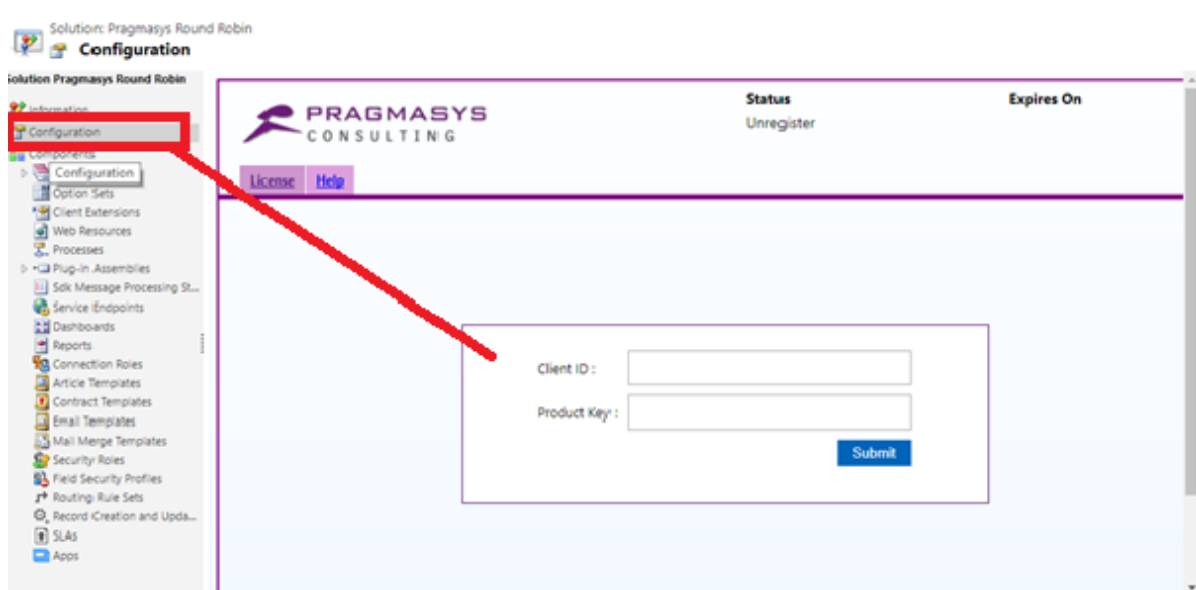
Kaizala Mobile Application

1.5 License/Registration


1. Open Solution “KaizalaIntegrationSolution_1_0_0_0”
2. Click on Configuration
3. Provide the Client ID and Product Key
4. Click on the submit button

Use following link to get the license and register.

https://product.pragmaxrm.com:8443/Product%20Registration/Registration.aspx?item_name=KaizalaConnector



Kaizala Mobile Application



Status
Unregister

Expires On

[License](#) [Help](#)

Client ID :

Product Key :

2017 © Copyright - Pragmasys Consulting | All Rights Reserved - Designed by pragmasys.in