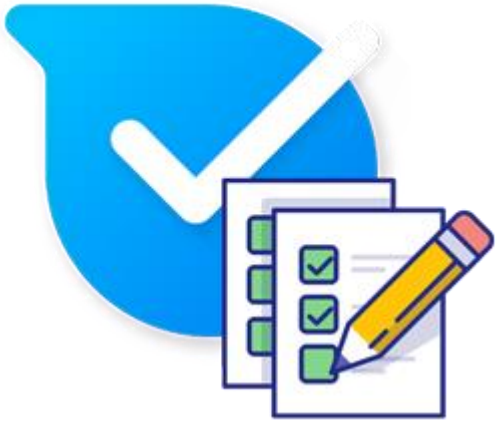

# Dynamics 365 - Kaizala Connector

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## 1.1 Kaizala

### 1.1.1 Introduction

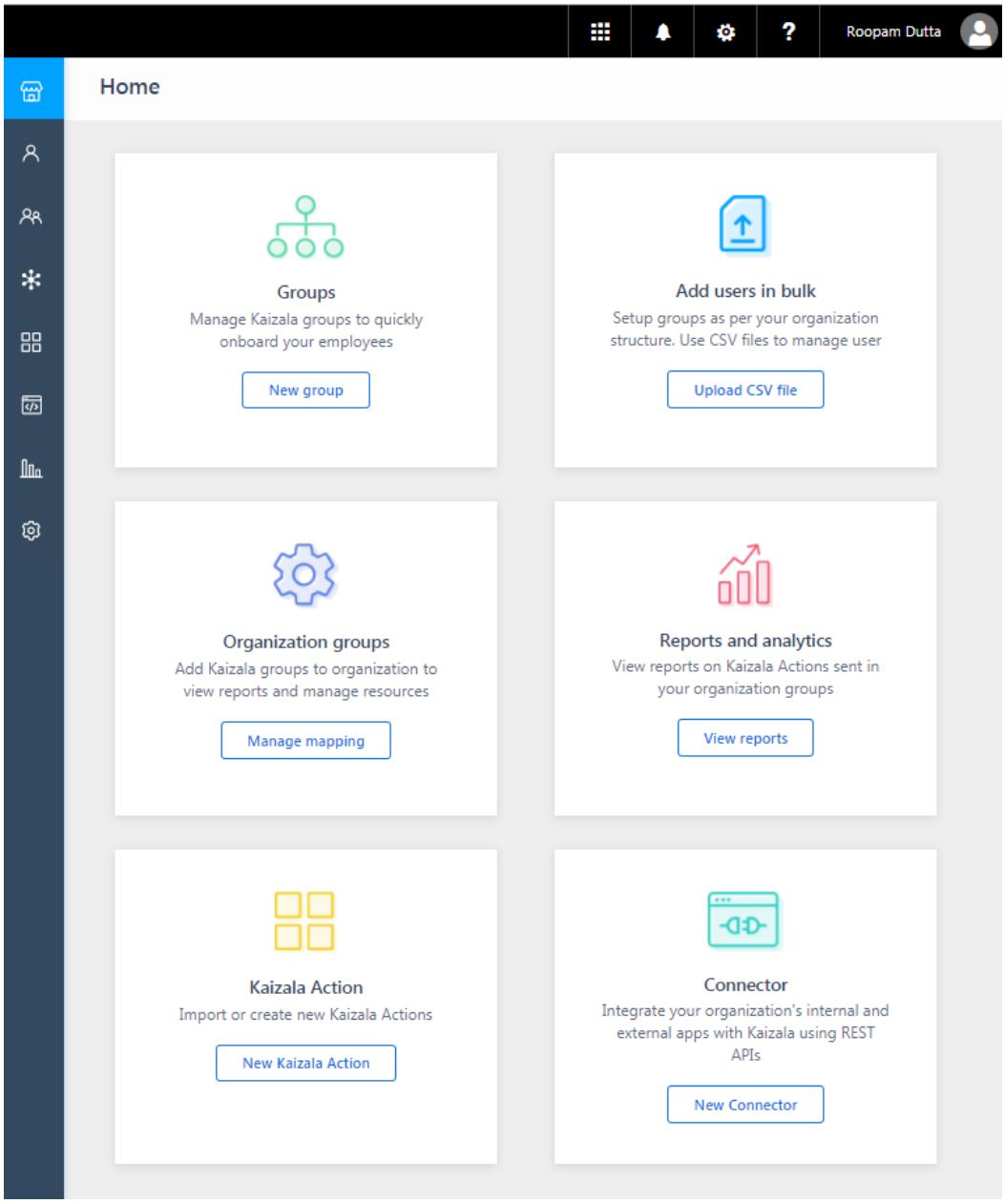
Kaizala is a mobile app and service designed for large group communications and work management. Kaizala makes it easy to connect and coordinate work with your entire value chain, including field employees, vendors, partners, and customers wherever they are. With Kaizala you efficiently assign and track 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.

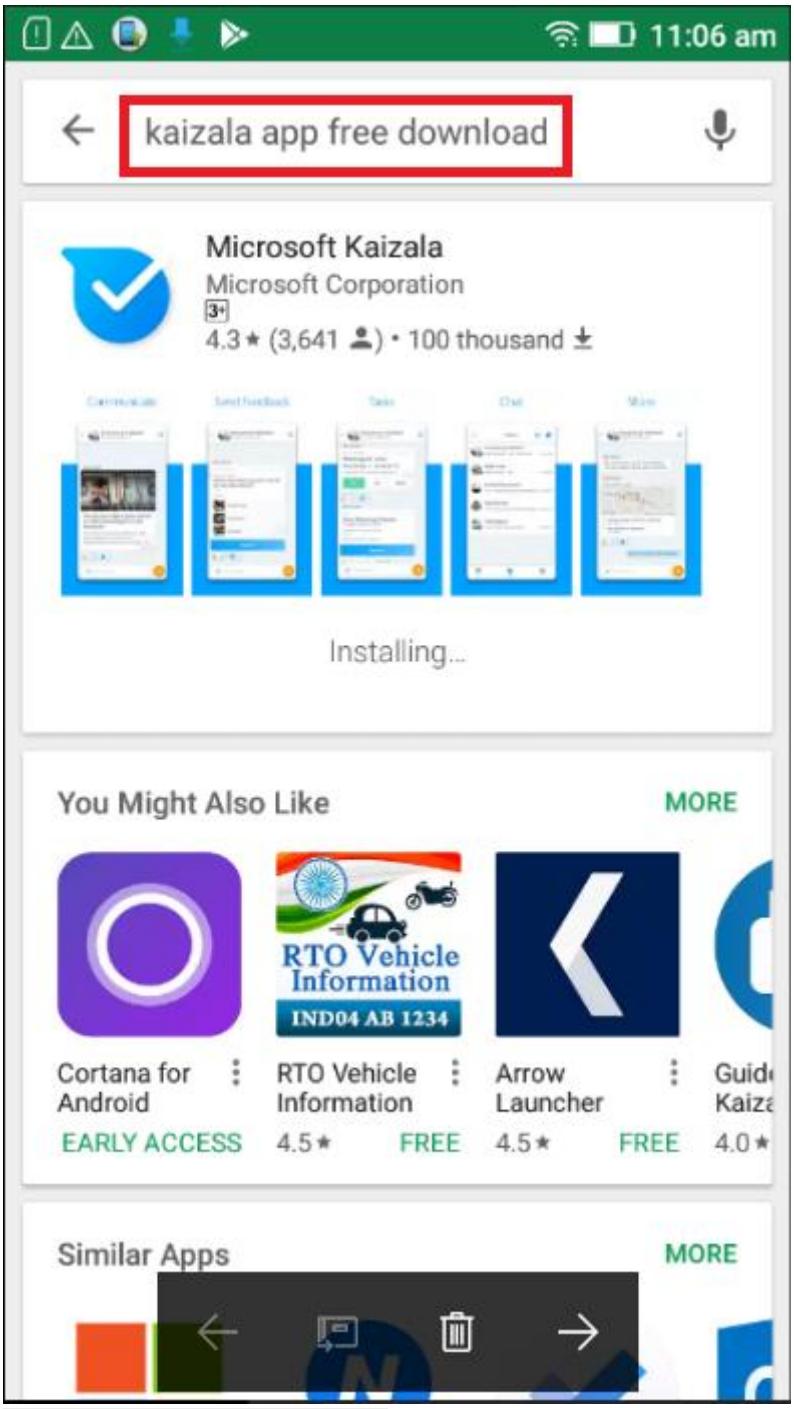
### 1.1.3 Management Portal

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.


Roopam Dutta
Home
Groups
Manage Kaizala groups to quickly onboard your employees
New group
Add users in bulk
Setup groups as per your organization structure. Use CSV files to manage user
Upload CSV file
Organization groups
Add Kaizala groups to organization to view reports and manage resources
Manage mapping
Reports and analytics
View reports on Kaizala Actions sent in your organization groups
View reports
Kaizala Action
Import or create new Kaizala Actions
New Kaizala Action
Connector
Integrate your organization's internal and external apps with Kaizala using REST APIs
New Connector

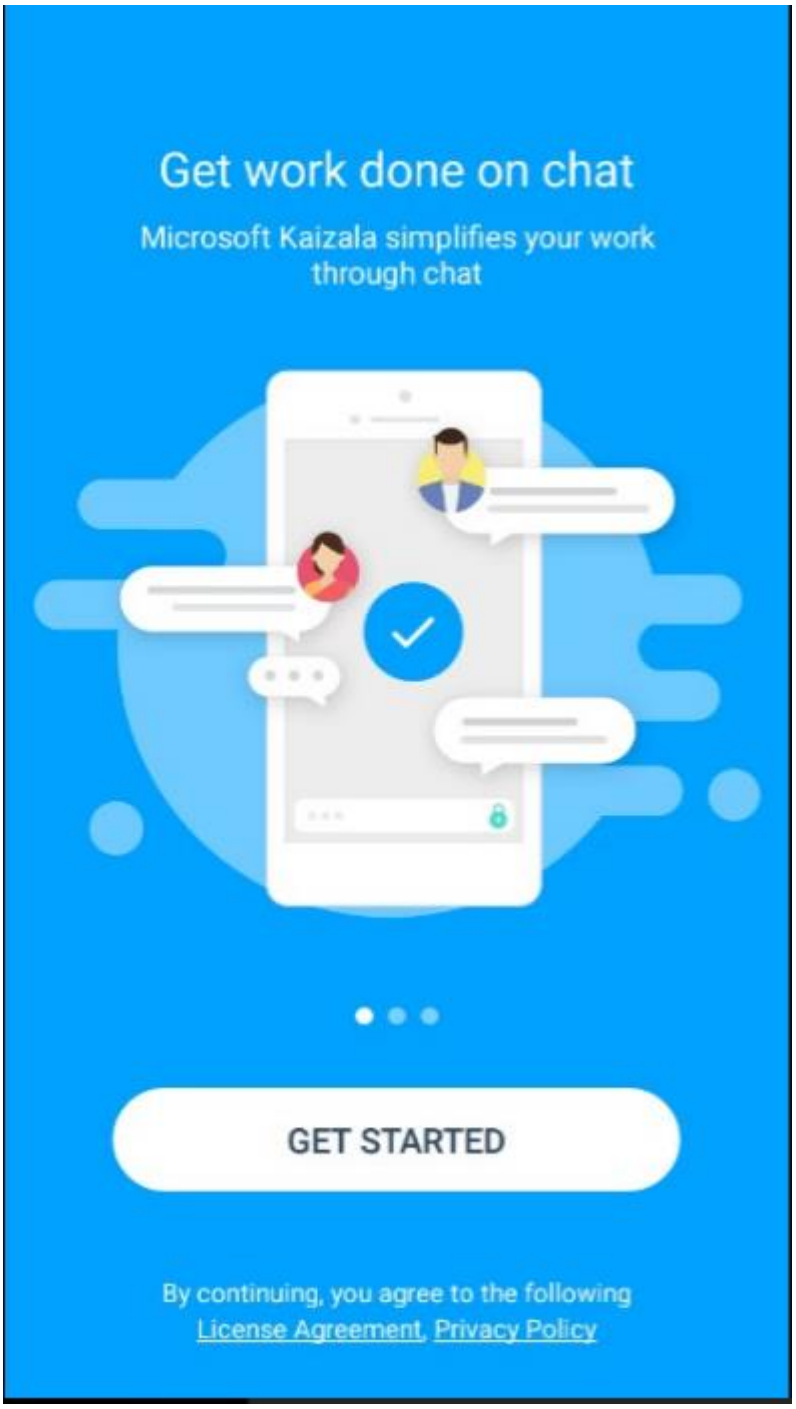
## 1.2 Installation of Kaizala

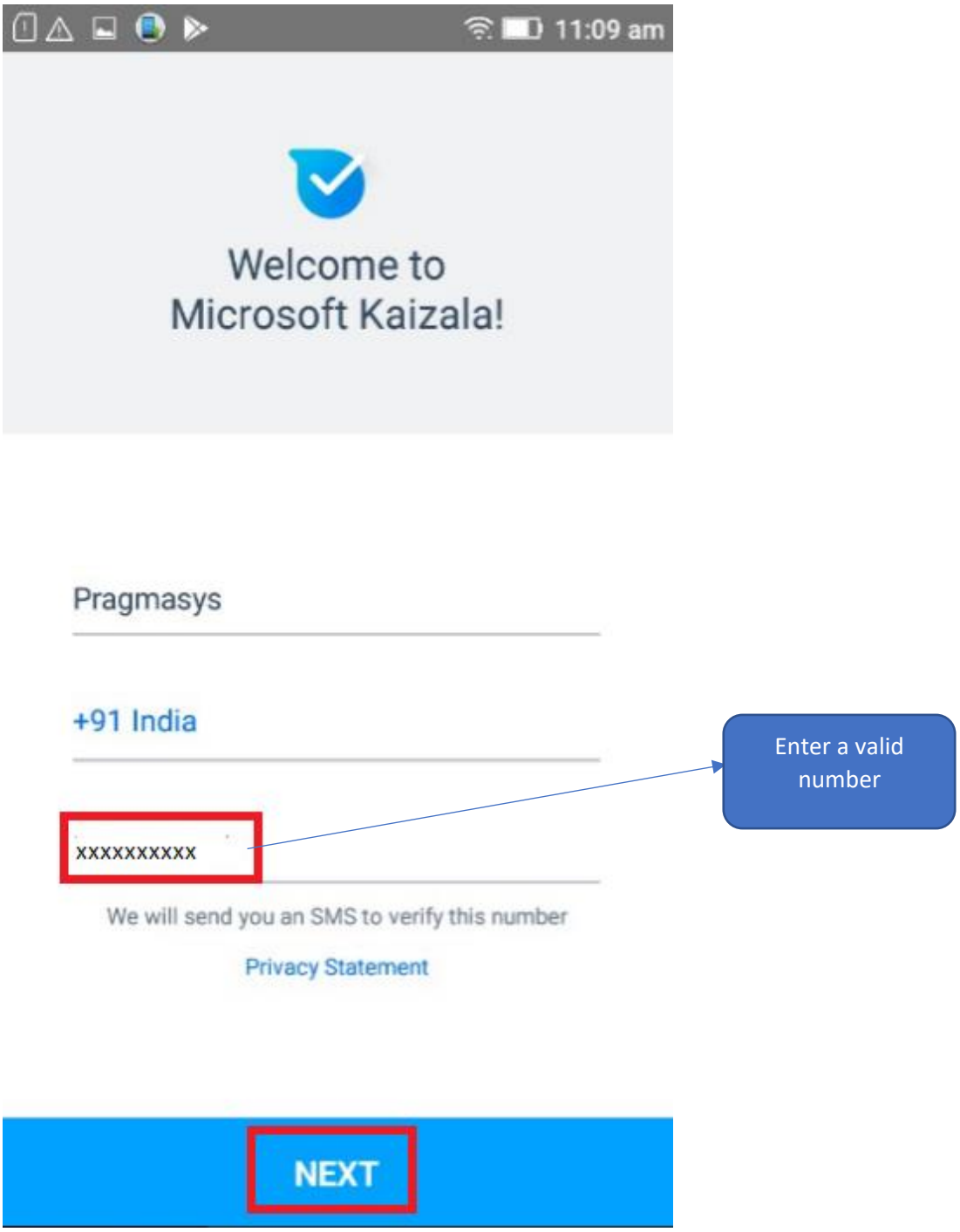
Kaizala can simply be installed on mobile from playstore.
Steps to follow: 1.) Enter 'kaizala app free download' in the playstore search box.
2.) Kaizala gets downloaded and installed successfully.

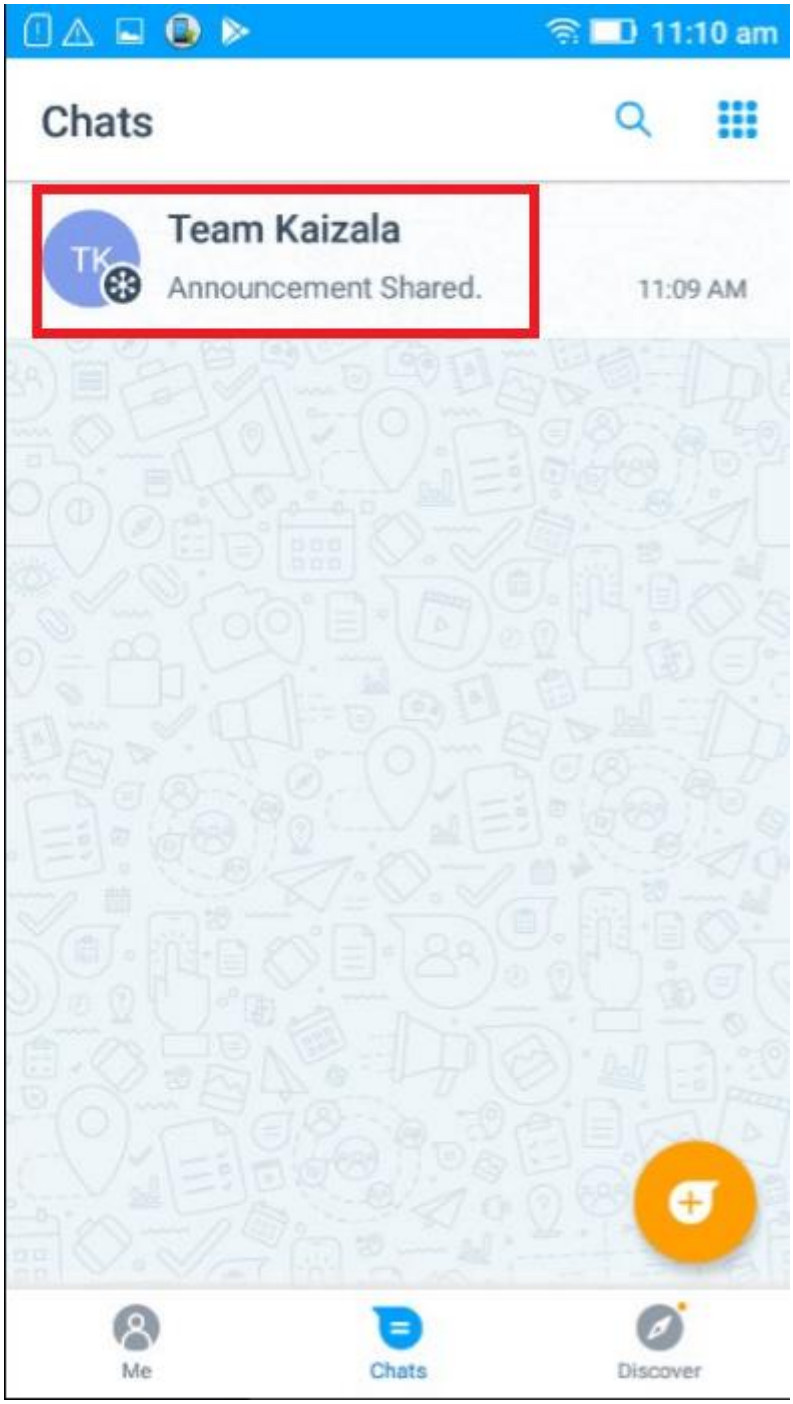



Kaizala - Get Started with Kaizala

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.

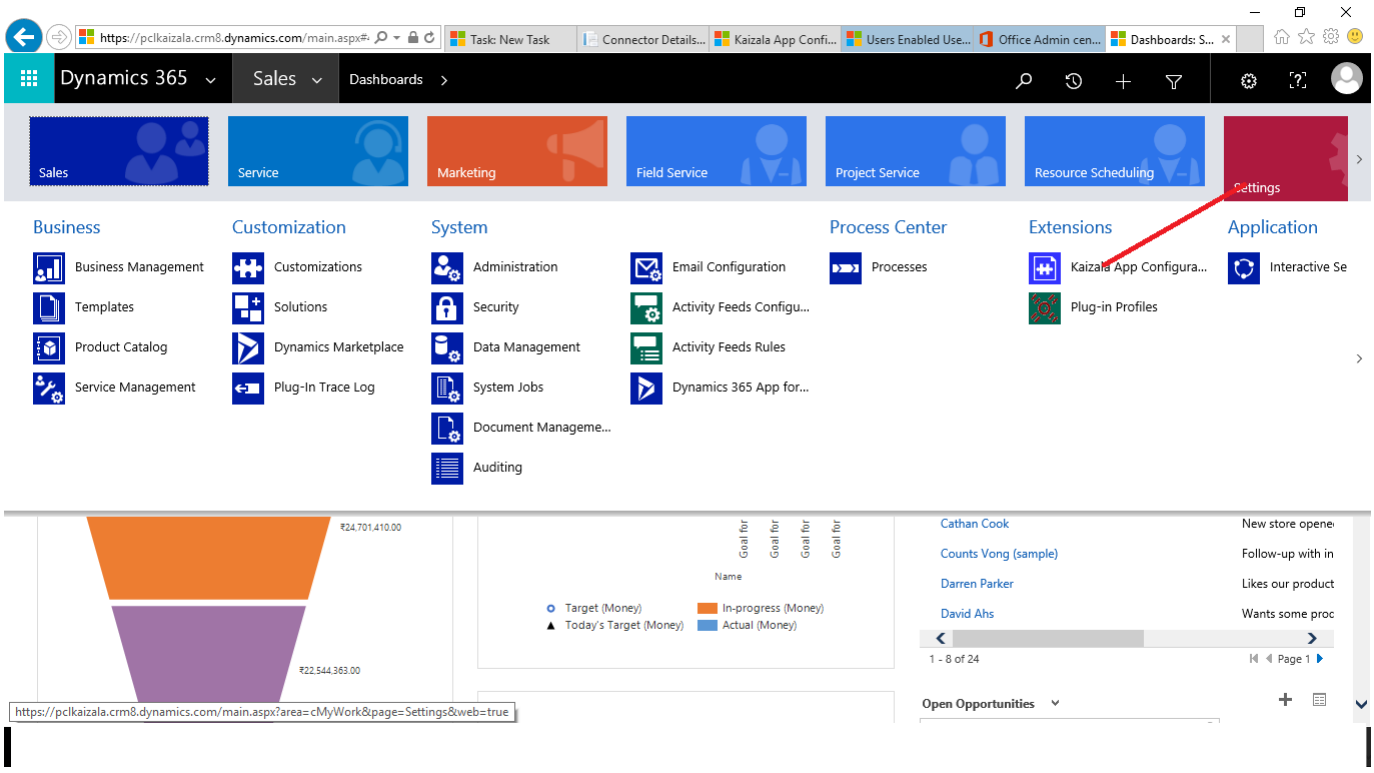


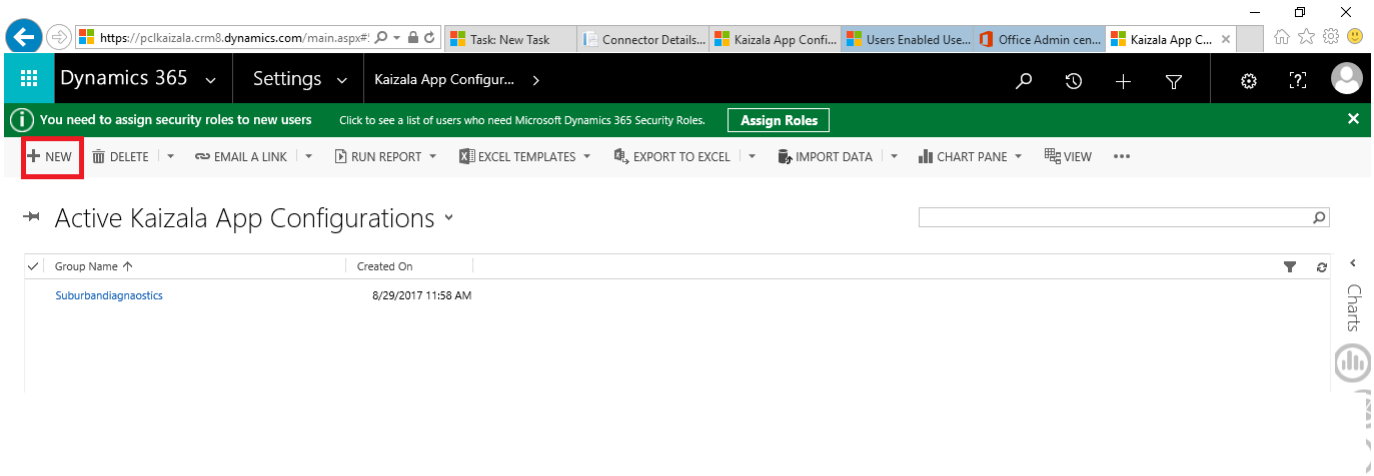

11:09 am
Welcome to
Microsoft Kaizala!
Pragmasys
+91 India
xxxxxxxxxx
We will send you an SMS to verify this number
Privacy Statement
NEXT
Enter a valid number


11:10 am
Chats
Team Kaizala
Announcement Shared.
11:09 AM
Me
Chats
Discover

## 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

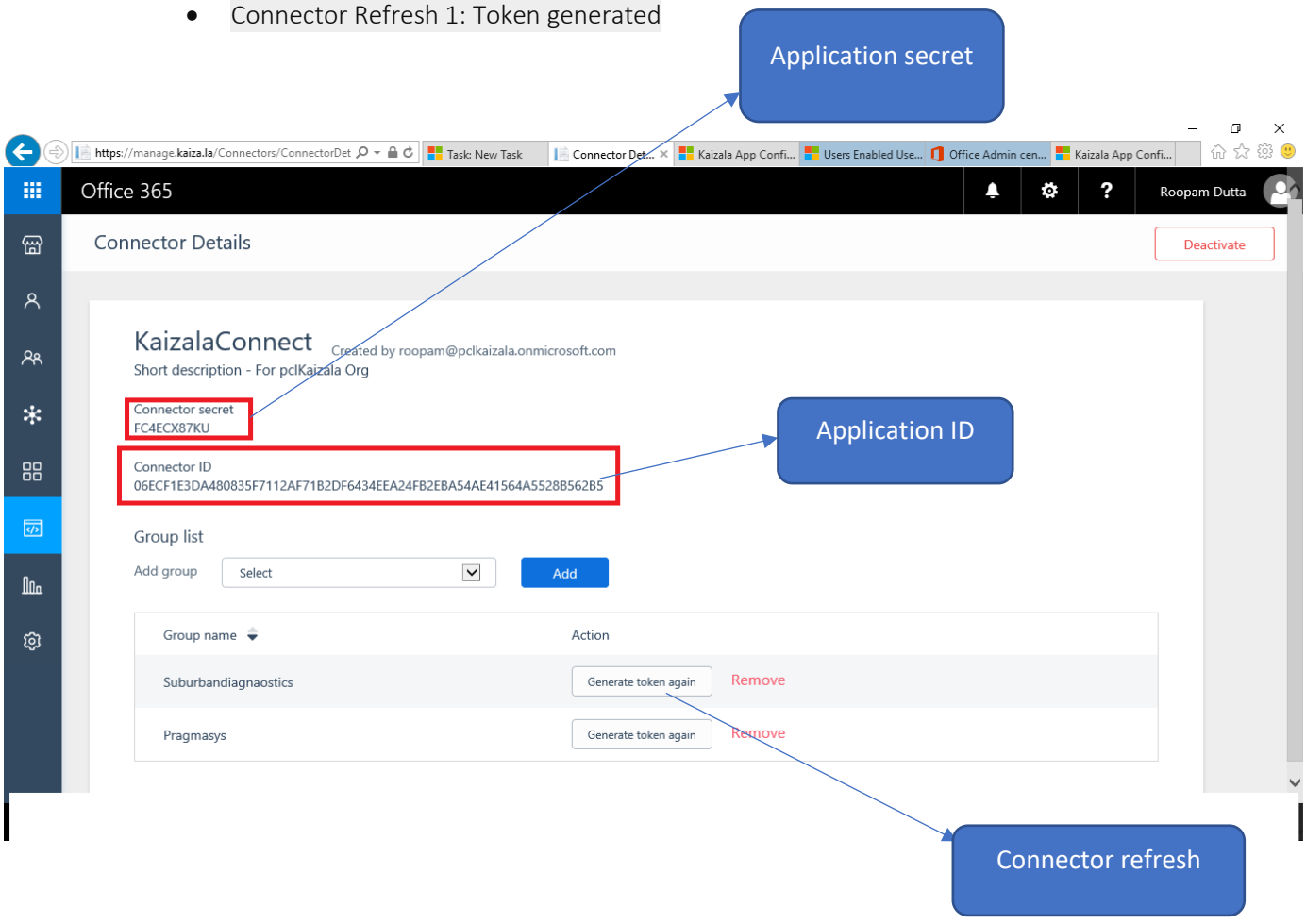



https://pclkaizala.crm8.dynamics.com/main.aspx#
Task: New Task
Connector Details...
Kaizala App Confi...
Users Enabled Use...
Office Admin cen...
Kaizala App C...
Dynamics 365
Settings
Kaizala App Configur...
You need to assign security roles to new users
Click to see a list of users who need Microsoft 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
Suburbandiagnaostics
8/29/2017 11:58 AM
Charts

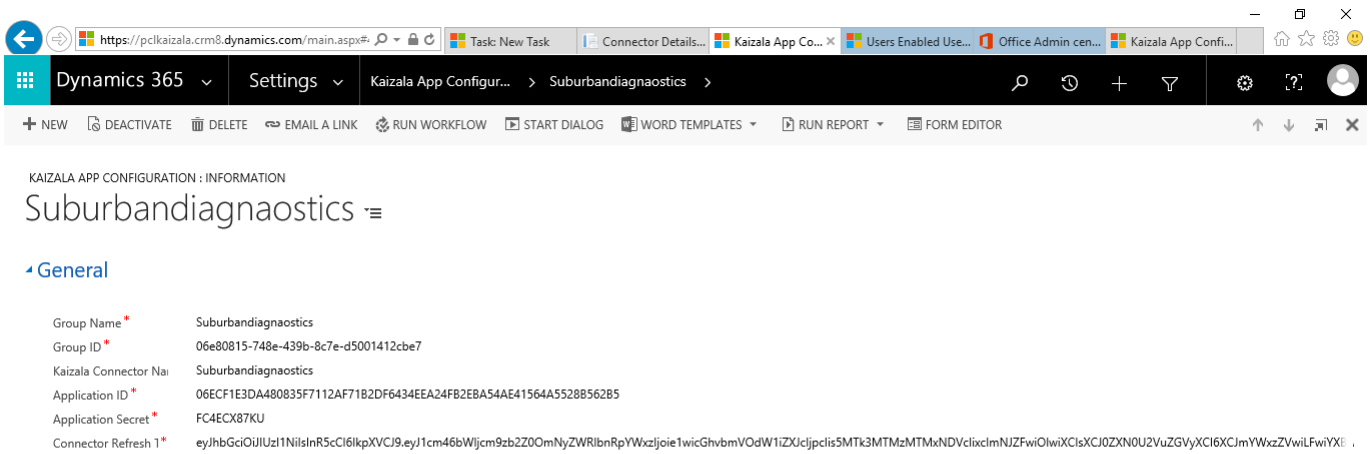
CONFIGURATION DETAILS:

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



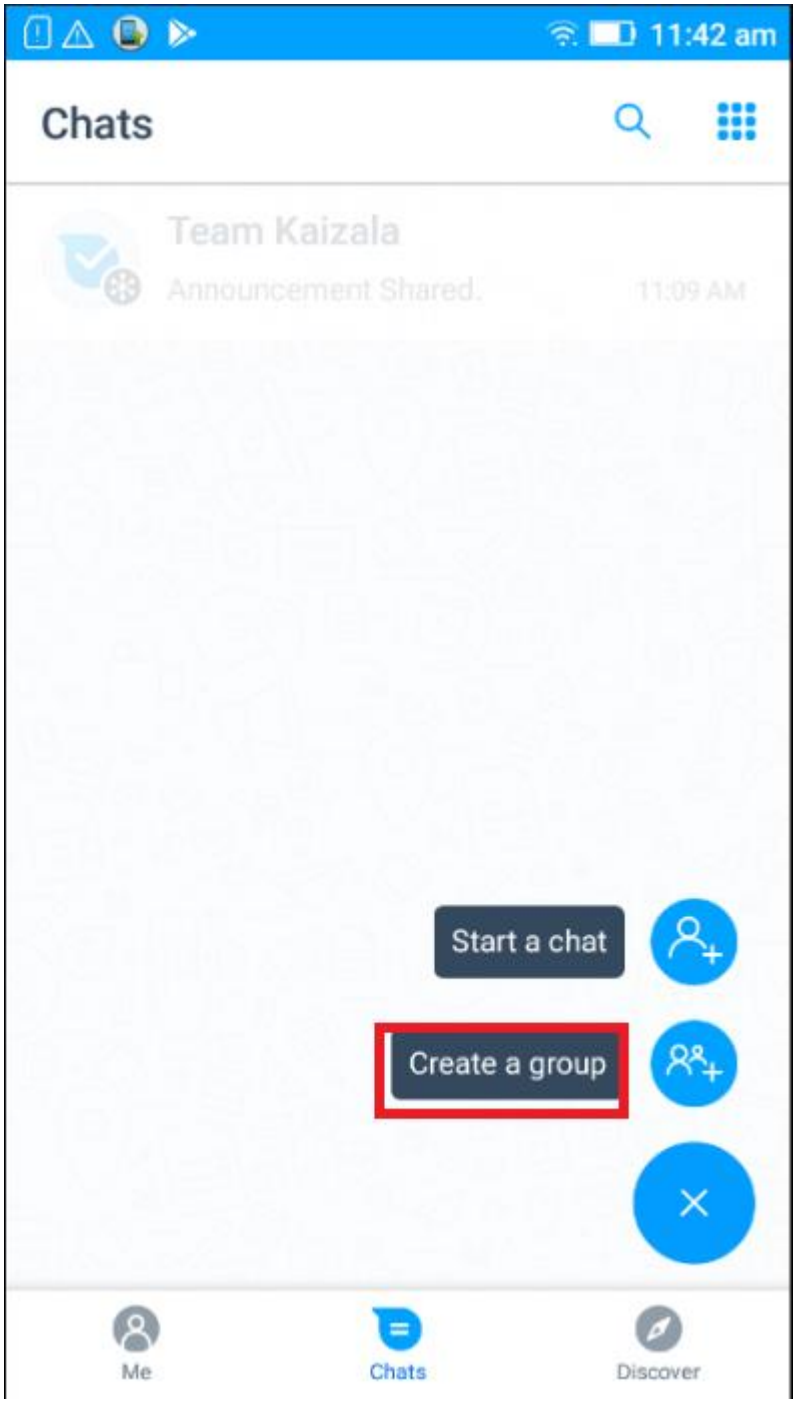
Provide the details and the save the record.



## 1.4 Kaizala Features

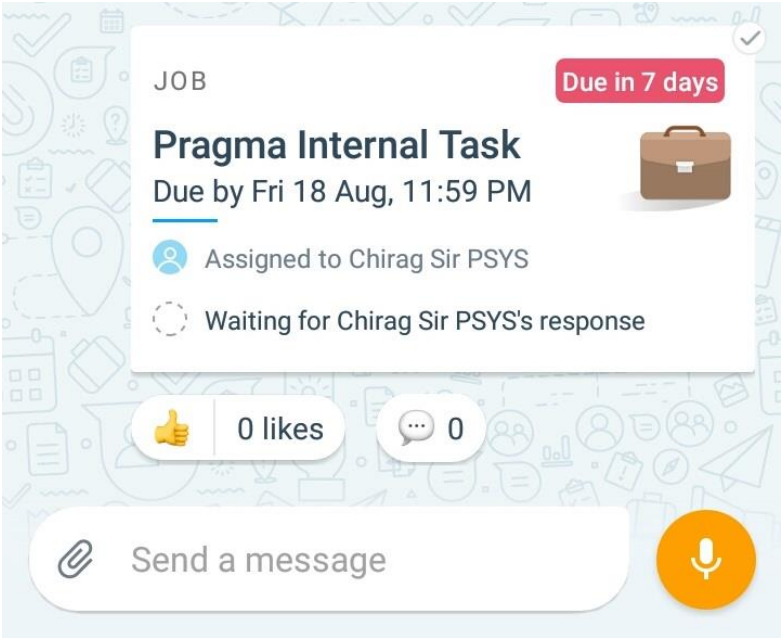
### 1.4.1 Creation of Groups

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


11:42 am
Chats
Team Kaizala
Announcement Shared.
11:09 AM
Start a chat
Create a group
Me
Chats
Discover

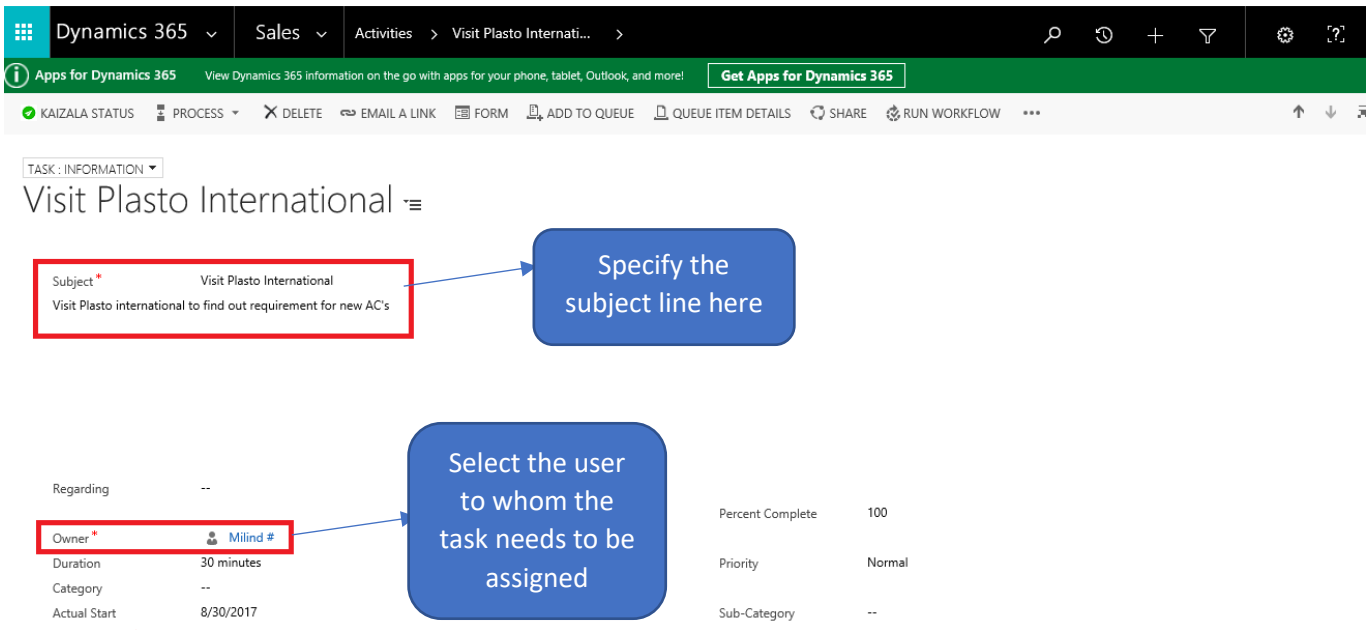
### 1.4.2 Kaizala – Dynamics 365 integration

Assign jobs to people and track completion status



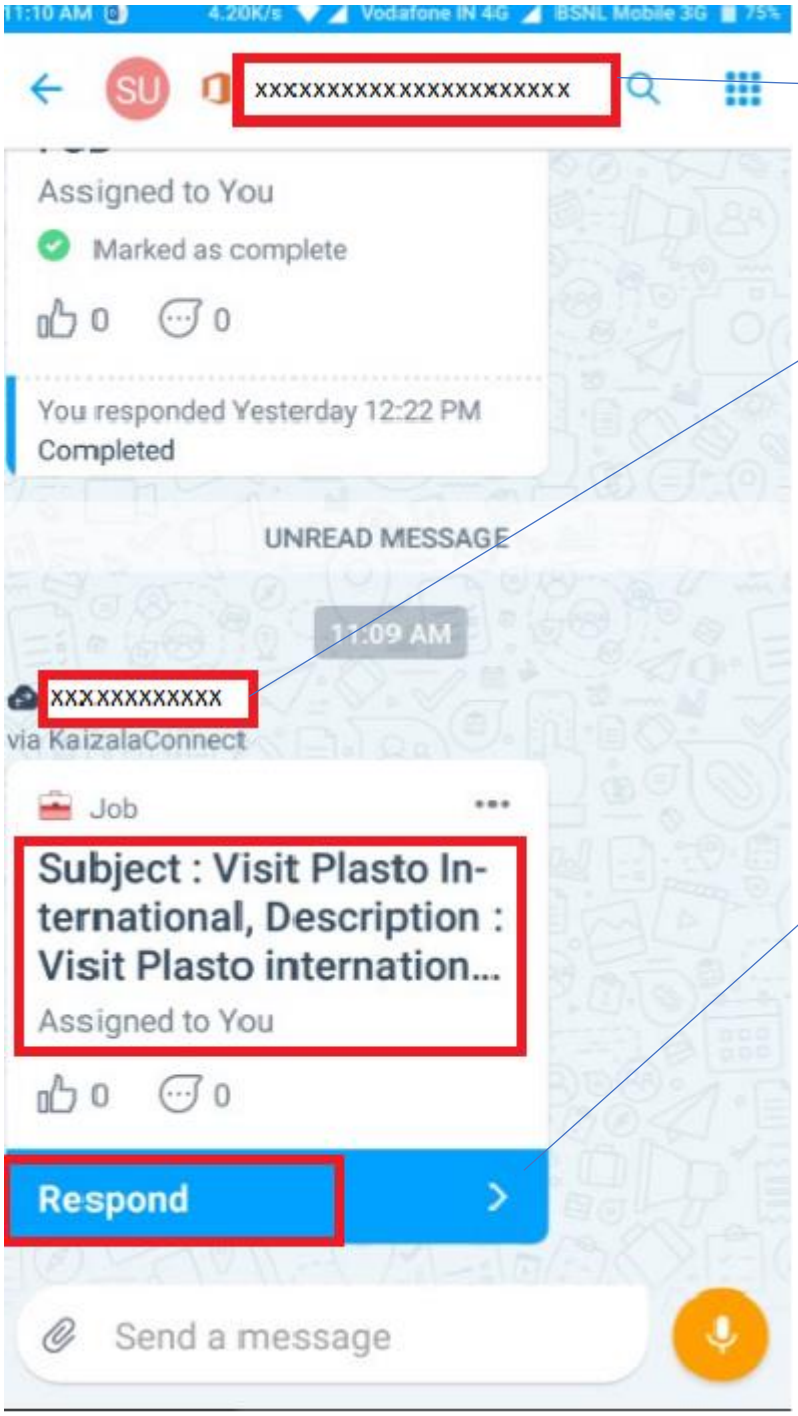

Steps: How the integration flow works

Steps: 1.) Create a task from CRM



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

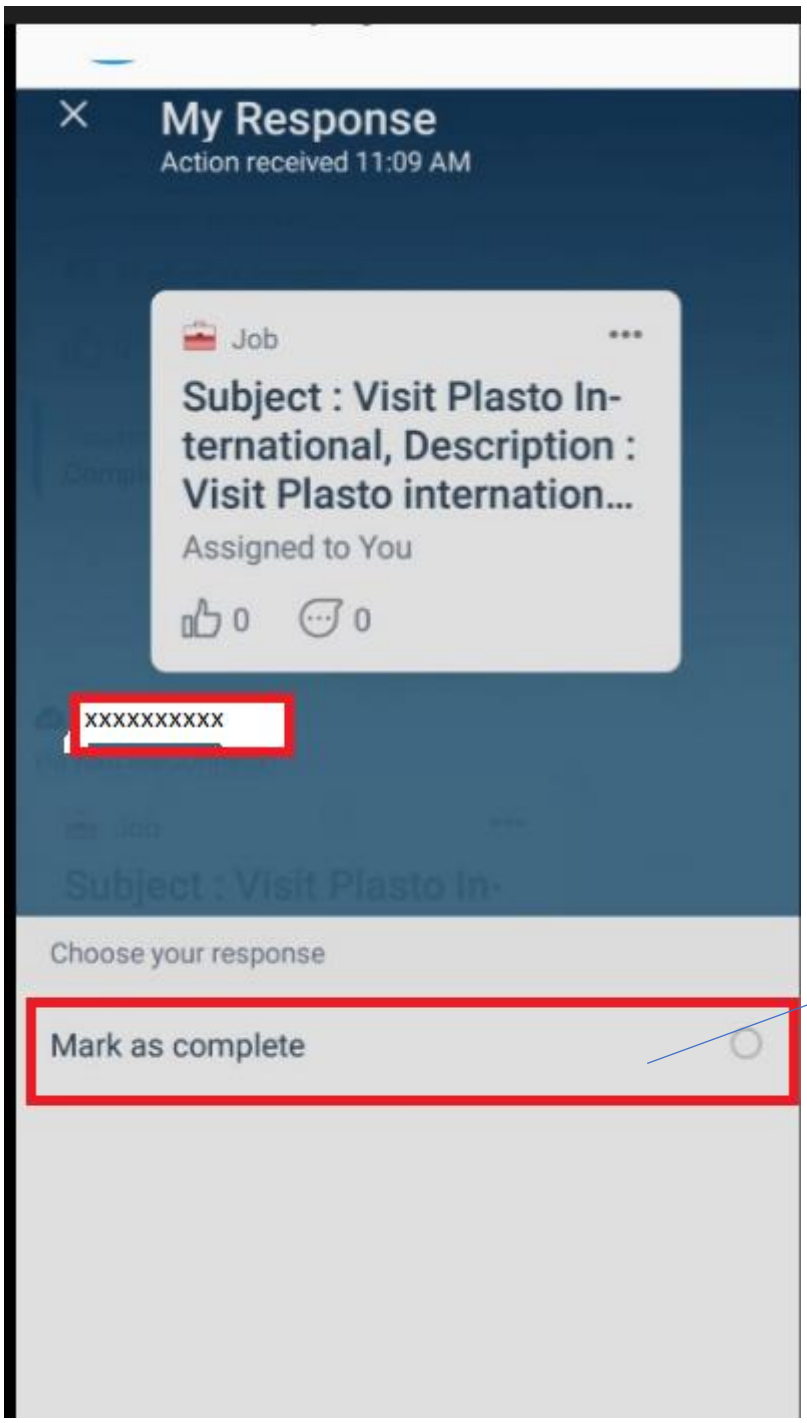


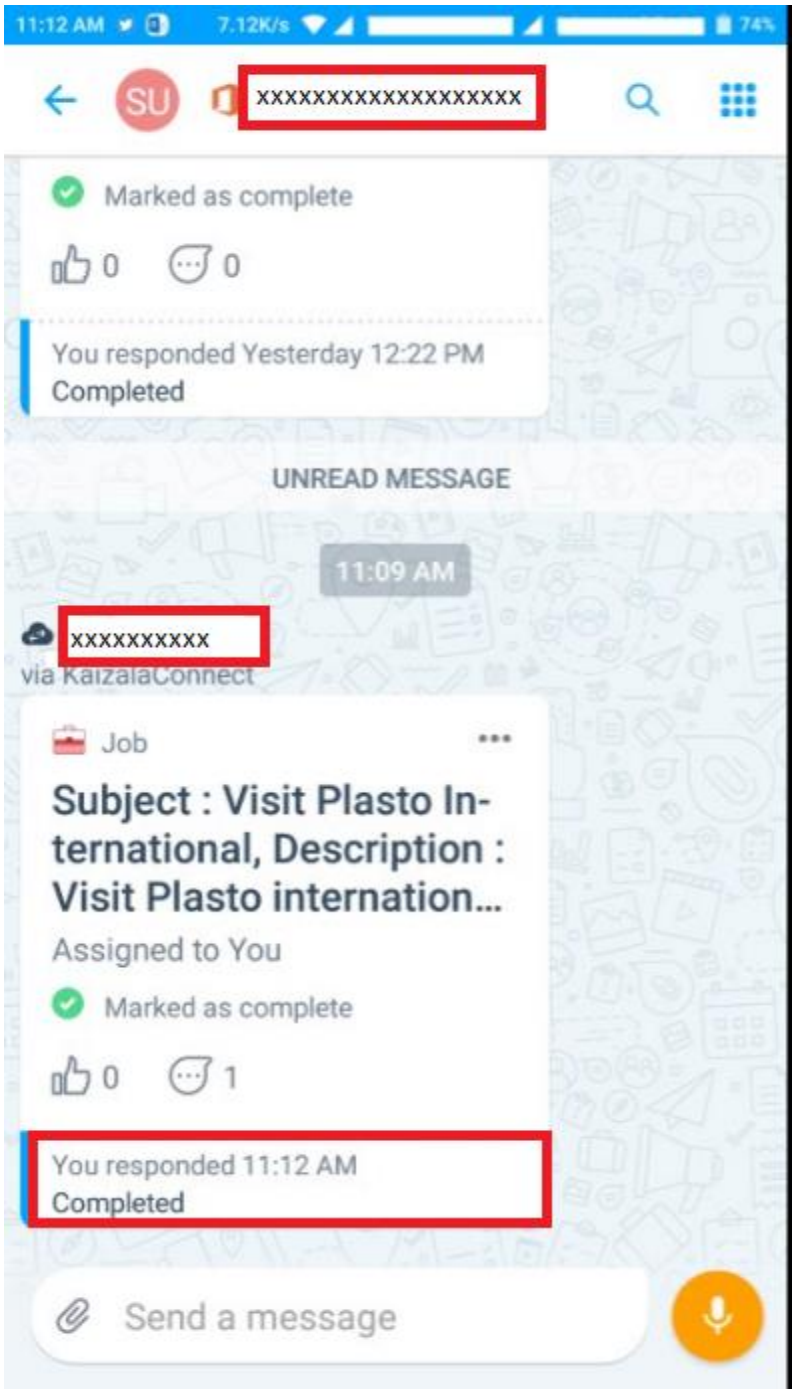

Name of the group

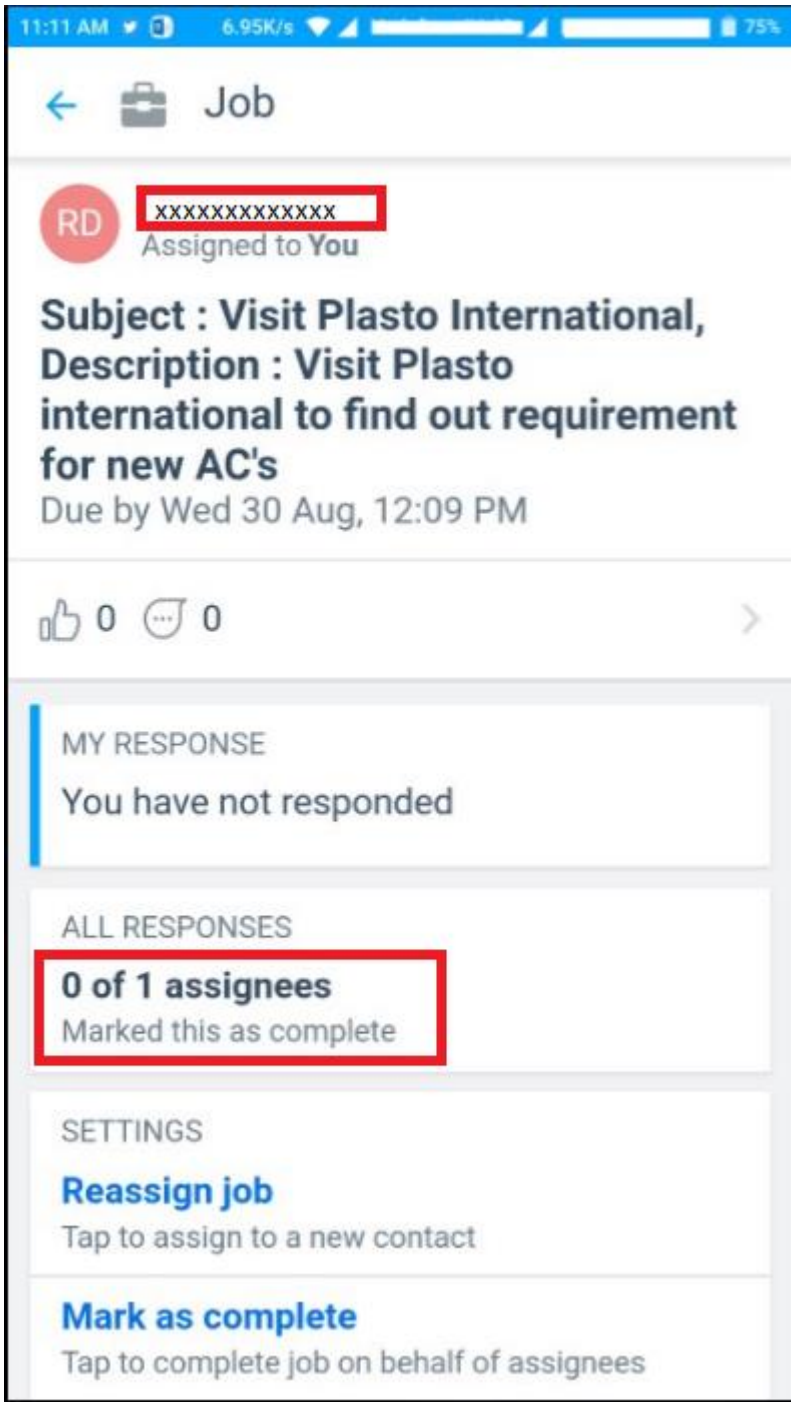
Notifies the user

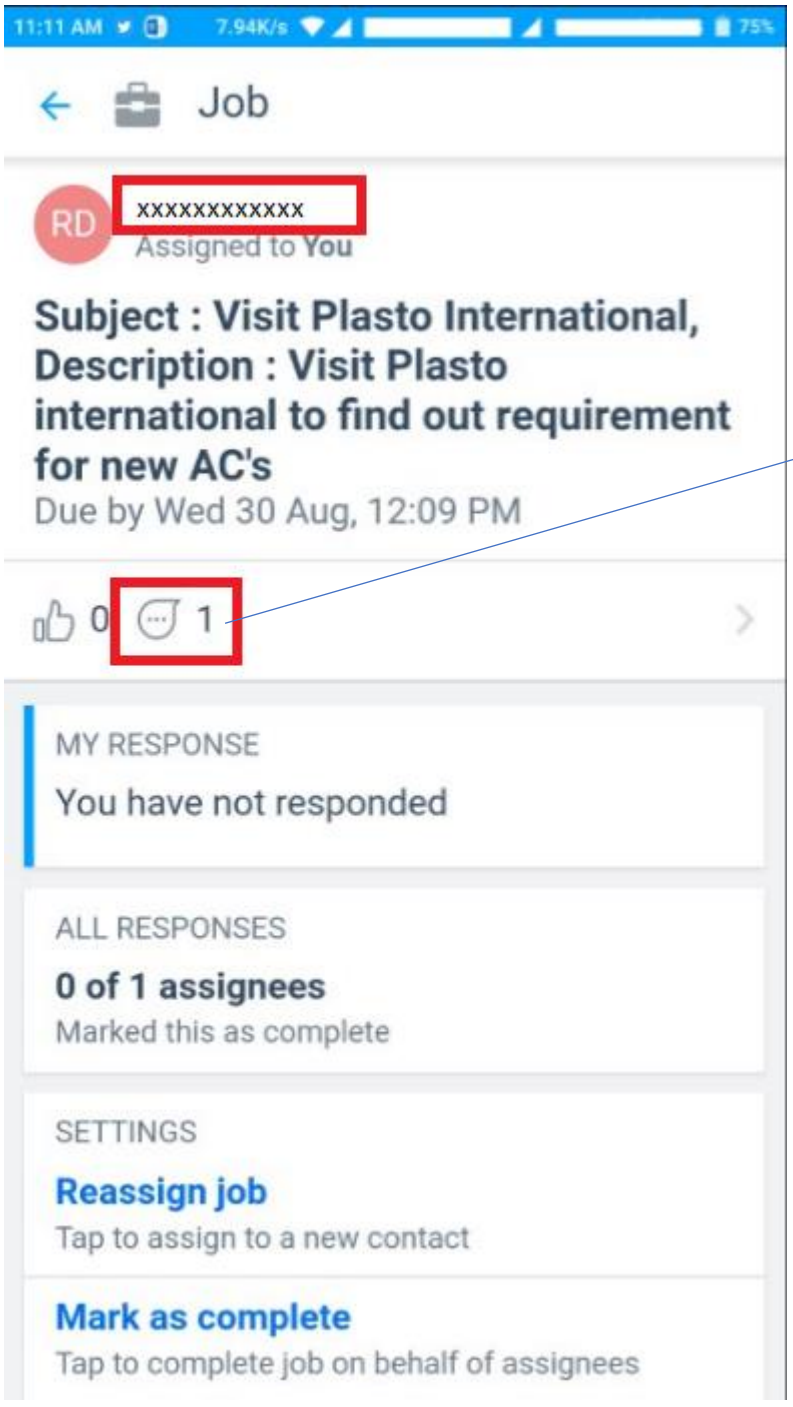
Click on Respond button

Click on the complete button



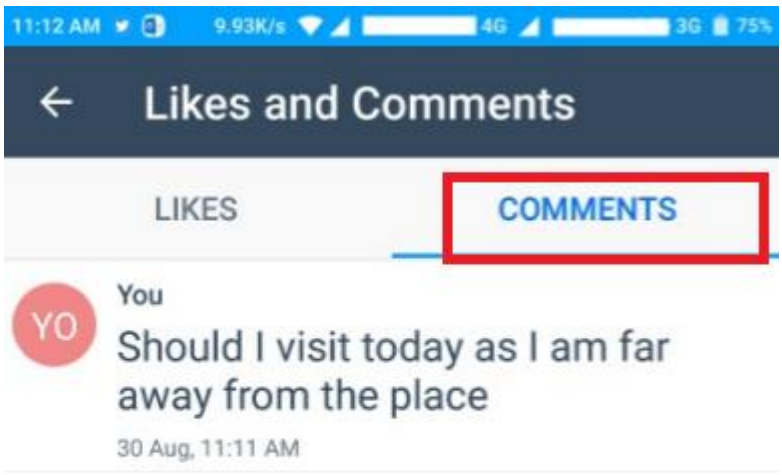

11:12 AM
7.12K/s
74%
SU
xxxxxxxxxxxxxxxxxx
Marked as complete
0
0
You responded Yesterday 12:22 PM
Completed
UNREAD MESSAGE
11:09 AM
xxxxxxxxxx
via KaizalaConnect
Job
Subject : Visit Plasto International, Description : Visit Plasto internation...
Assigned to You
Marked as complete
0
1
You responded 11:12 AM
Completed
Send a message


11:11 AM
6.95K/s
75%
Job
RD
xxxxxxxxxxxxx
Assigned to You
Subject : Visit Plasto International, Description : Visit Plasto international to find out requirement for new AC's
Due by Wed 30 Aug, 12:09 PM
0
0
MY RESPONSE
You have not responded
ALL RESPONSES
0 of 1 assignees
Marked this as complete
SETTINGS
Reassign job
Tap to assign to a new contact
Mark as complete
Tap to complete job on behalf of assignees

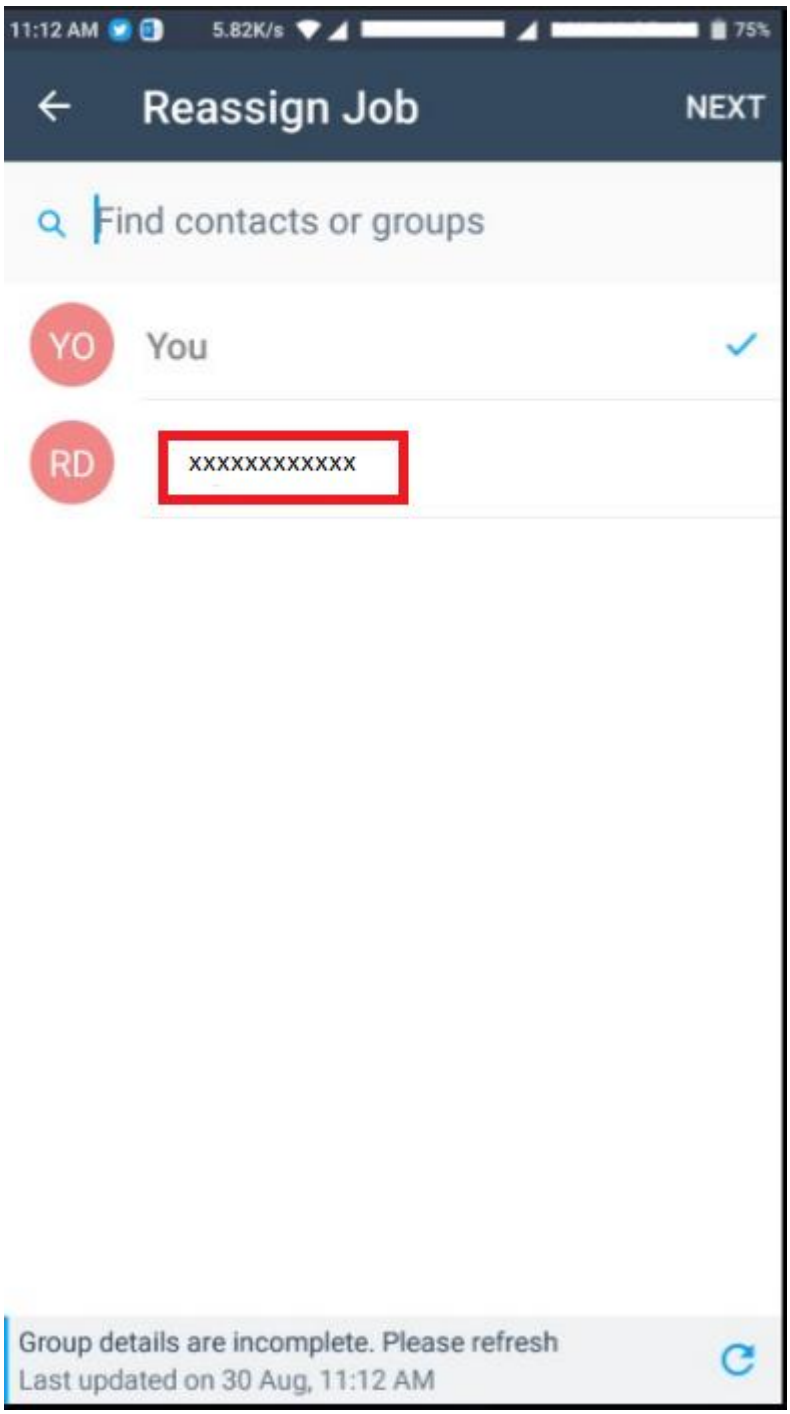



Click here to share a comment

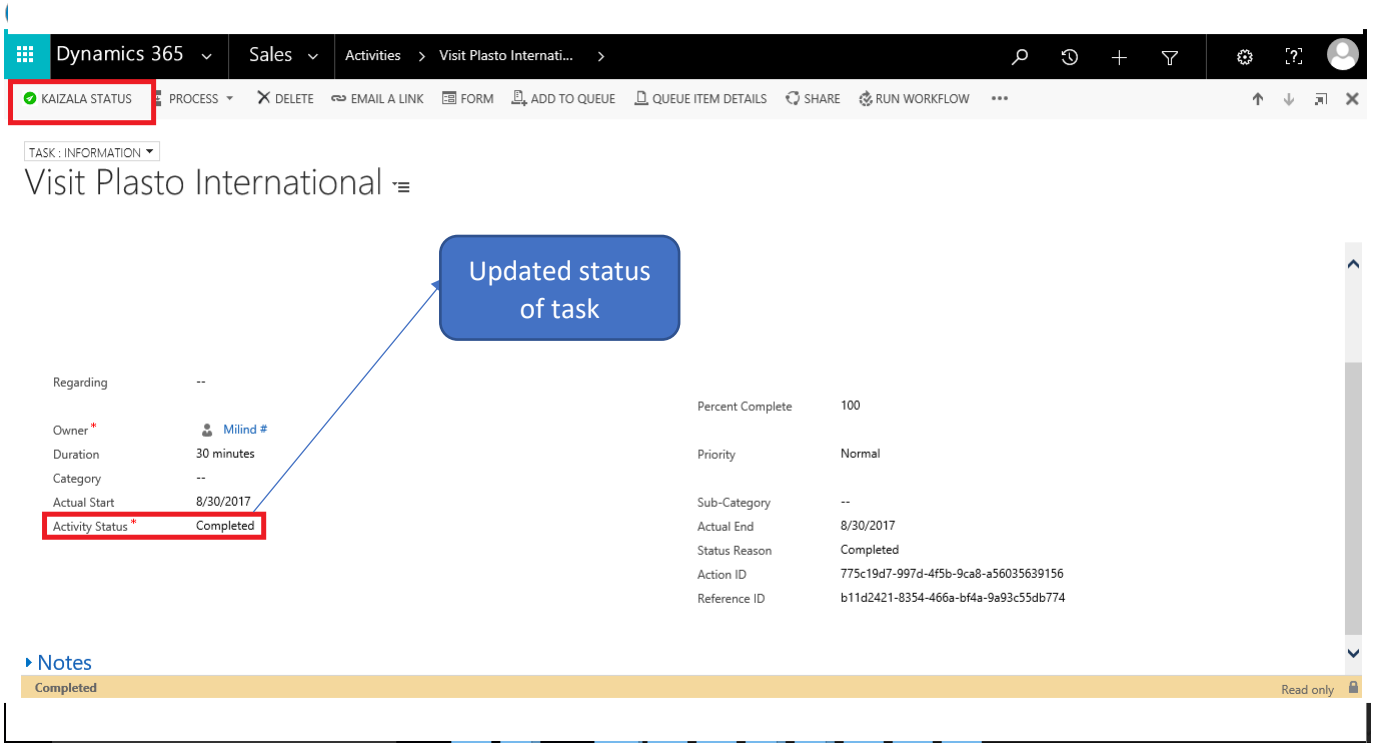
Click on the comment option



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



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




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

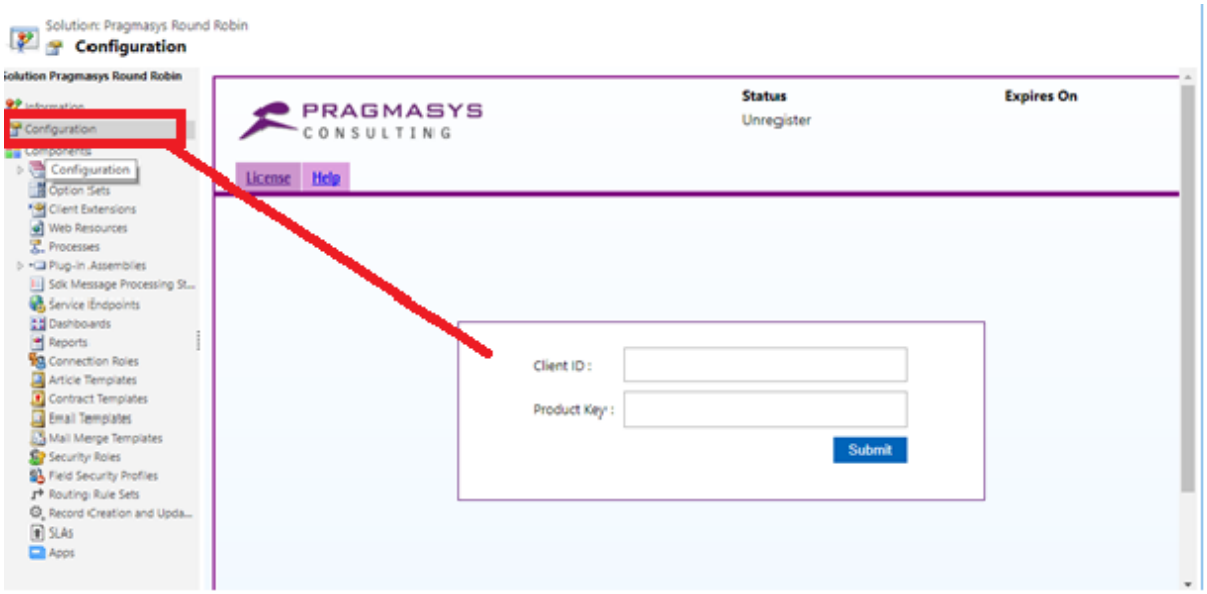
*https://appsource.microsoft.com/en-us/product/dynamics-365/pragmasys.pragmasys_workflowscheduler?pub_source=email&pub_status=success*

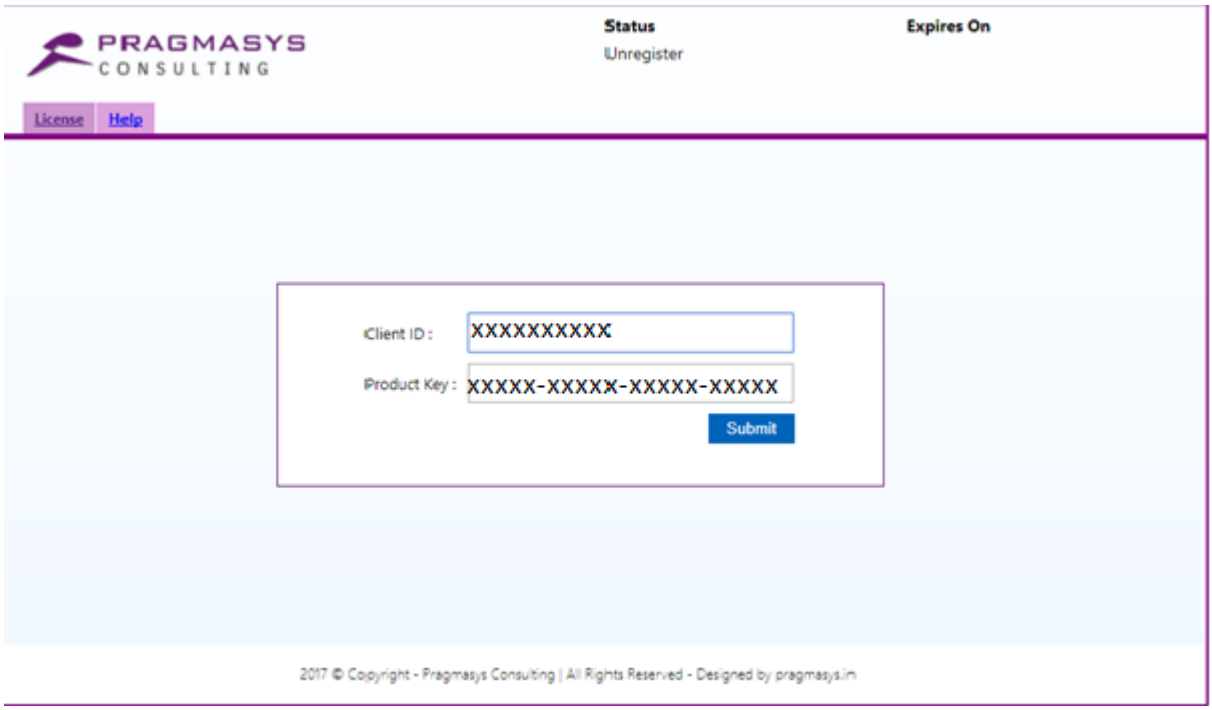
## 1.5 License/ Registration

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




PRAGMASYS
CONSULTING
Status
Unregister
Expires On
License
Help
Client ID :
XXXXXXXXXX
Product Key :
XXXXX-XXXXX-XXXXX-XXXXX
Submit
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