

UNITY CRM INTEGRATION

Agile CRM

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1 OVERVIEW

Unity seamlessly integrates with Agile CRM 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 Agile CRM.

This functionality relies on a CRM Integration license being assigned to the user, as shown below. Please note this license is required in addition to the base license for Unity Desktop, Agent, Supervisor or Reception. However, this functionality is included in all trial licenses for these Unity clients.

If a CRM Connector license has not previously been assigned to the user, then a trial license will automatically be assigned the first time CRM configuration settings are entered in Unity.

Details Branding License Details I	History Log Call Center Activity		
Steve Tutt License Usa <u>c</u>	je		
All licenses assigned to this user. A user car	n have only one permanent license per application. When add	ing a new permanent license, all existing permanent license	s for the same application will
□ Include Inactive	License	Start Date	EndDate
View	UnityAgent Enterprise	2014.06.24	Active License
View	UnityCrmIntegration Standard	2016.09.12	Active License
View	UnityDashboard Standard	2016.06.24	Active License
View	UnityDesktop Enterprise	2013.08.19	Active License
View	UnityMobile Standard	2015.09.03	Active License
View	UnityReception Enterprise	2015.04.16	Active License
View	UnitySupervisor Enterprise	2013.05.09	Active License

Once this license is assigned and Unity is restarted, the CRM panel will become available in Settings, as shown below.

ervices Settings		
- Skin - Contact Search - Contact Display - Current Calls - Computer/Phone Integration - Clipboard Integration - Dialling Rule - Custom Directory Integration - Configuration - Outlook Integration - Browser Integration - GRM - Desktop Integration - Call Notification - Unity Connect	•	Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation. Configuration Automatic Contact Pop CRM Platform None

To configure Unity to integrate with a CRM platform, simply select the CRM platform from the dropdown list and complete the required fields, as outlined in sections below.

You can also configure Unity to automatically pop the CRM contact when the phone is answered, as shown below.



2 CONFIGURING AGILE CRM INTEGRATION

The Agile CRM API requires an API key which can be obtained through the web portal, the below steps allow you to configure Unity to integrate with the Agile CRM platform through your user account.

① Add ▾	
Chris Tutt	Sems 70
Preferences	
Admin Settings	
Theme & Lavout	

Log into Agile CRM and click on 'Admin Settings' under the account button in the top-right corner.

Preferences	API Key
Users	REST API
Custom Fields	uja78sbdp8li8cstuc5eru4rjp
Deals	For Java, PHP, .Net wrappers and integrations like Zapier, Wufoo
Tags	Javascript API Key
Tasks	Only for tracking code on website.
Telephony	Analytics Code
Service	Allowed Description
Integrations	Attowed Domains
API & Analytics	IP Filters

Click on 'API & Analytics' from the menu on the left, then copy the REST API field from the webpage, as shown here. Please be sure to capture all text, it may be helpful to paste to Notepad to ensure you have all characters [without formatting] before pasting into Unity. Go to Unity Settings and select Agile CRM as the CRM platform. You will then be able to enter the login ID and password that you use when logging into Agile CRM, as well as the API key that you have copied from the webpage.

Services & Settings		×
Services Settings	Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation. Configuration Automatic Contact Pop CRM Platform Agile Domain unityclientagilecrm.com Login ID jenna.wimshurst@unityclent.com API key cd5c5dsdfds9g8r4s2 Include contacts Include contacts Show record type when searching Automatically add call log entry Close call log entry immediately	
	X Cancel	ОК

Click the test button to save and test the log in details.

Note: Please ensure the domain excludes any suffixes such as .com/.org etc as the domain must be appended with agilecrm.com. For example, the below will fail:

Domain	
unityclient.com	.agilecrm.com

Instead the domain should be:

Domain	
unityclient	.agilecrm.com

Please take care when entering the domain as this is a common reason for Agile CRM integration not working as expected.

It may be useful to include the Agile record type when testing the connection. To do this simply perform a contact search and compare the results to Agile CRM.

MZ Markus Zusak	File Messaging T	ools Help	0 (0	0 0	ł
Cloud Services UN				My St	atstics		
11111111111111111111111111111111111111	Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Tot
17 to to to to to	Bolts Sales	0	0	0	00:00	00:00:00	6
CE Edit Concect	Nuts Sales	0	0	0	00:00	00:00:00	. (
	O Customer Support		2	12	-	10000	
Owner	O Partner Support	-		-			
Jenne Wimshurst		0	0	0	00:00	00:00:00	1
Tags cloud x services x ut x Elais	From			To			
Control Control Control	Contacts Call Logs	Abandoned Ca	lls Voicemail	AgentActivity			
	Panet Law	A A SPORT A SHOW	10				
Contact Info	Search Larry		1.4				
01210256358	Name			Ph	one		
07000575695 multie	🐛 Maritus Zusak (Agle	CRM Contact - M	iobile)	07	976493815		
mzusak@cloudservicesuk.com	Larry France			00	18008813055 e	ith. 502	

3 UNITY CRM FUNCTIONALITY

3.1 CONTACT POP

From

Markus Z

+

~

Unity will use Agile CRM to identify inbound and outbound calls, including queued call center calls.

To

Contacts	Call Logs	Vo	icemail	Abandoned Calls			
Search	marku Q						
Nam	е						
C Marki	us Zusak	C	Call nu	mber			
			Send e	d email			
			Show C	CRM contact			
-			Copy n	umber			
			Person	al directory			
-		۰	Manag	e user list			
			Appear	ance 🕨			







Assign call to account code

Show CRM contact

Add CRM call log entry

Reset column widths Show gridlines

Add number to personal directory

You can also click on the call details 'toast' notification popup to pop the contact, as show here. Again, this assumes the contact was found in the CRM platform.

X O Services & Settings Services Settings Specify how to be notified of incoming or outgoing calls. When browsing to a URL use the [Number], [Direction], [CallID] and [LoginID] placeholders which Unity will then replace with the call details. Skin Contact Search Contact Display Current Calls Gomputer/Phone Integration Clipboard Integration Dialling Rule Show remote party phone number Custom Directory Integration On an incoming or outgoing call Outlook Integration Override the contact name using the number Browser Integration CRM verform auto answer when using click-to-dial Call Notification 📝 pop Unity Unity Connect ☑ auto-hide Unity when call completes Quick Keys pop summary notification - Key Combinations Commands for 5 🚖 seconds Startup Update Instant Messaging & Presence When call details clicked - Logging XMPP 🔽 pop Unity Security pop Outlook (if applicable) Language pop CRM (if applicable) Connection Network browse to URL (if entered) Proxy

This feature depends on the appropriate Call Notification setting being activated, as shown below.

Unity can also be configured to automatically pop the CRM contact when the call is answered, which depends on the Automatic Contact Pop tab settings as shown below.

ervices Settings		
Skin Contact Search Contact Display Current Calls Computer/Phone Integration	*	Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation.
Clipboard Integration Dialling Rule		Configuration Automatic Contact Pop
Configuration		Everytime I answer an inbound call
Outlook Integration Browser Integration		V that is through a call center
LCRM		that is not through a call center
Desktop Integration Call Notification		Everytime I make an outbound call
- Unity Connect		that is through a call center
🖹 Quick Keys	=	that is not through a call center

3.2 CONTACT SEARCH

When you perform a contact search, Unity will check all directories such as the group/ enterprise phone list, personal directory and Outlook etc, but it will also search Agile CRM and return results. You can search on contact name or company name, as shown below. Simply double click an entry to call that number.

Cor	tacts	Call Logs	Voicemail	Abandoned C			
s	earch	nat		Q			
	Nam	e					
C	Vatalie Maines (Agile CRM Contact)						
Nate Olson-Daniel (Agile CRM Contact)							

Please note that you will need to type in a minimum of three letters to search for a CRM contact.

¢	Sally Black	t	Call number
C	Sally Jone	~	
C,	Sally Jone		Send email
C	Sally Wain		Show CRM contact
C	Sally White		
			Copy number

You can also right-click entries to send an email using the default mail program.

3.3 CALL LOG ENTRY

When integrated with Agile CRM, Unity can add call log entries on behalf of the user, as outlined below.

3.3.1 Manual Call Log Entry

Right-click on a call and select to add a call log entry, as shown below.

Chris Tutt	From	To		Duration	Status
Show CRM contact Add CRM call log entry Reset column widths	Chris Tutt		Add number to personal directory	00:00	Ringing
Add CRM call log entry Reset column widths			Show CRM contact		
Reset column widths			Add CRM call log entry		
Show gridlines		 Image: A start of the start of	Reset column widths Show gridlines		

Unity will enter basic details of the call depending on if the call is inbound or outbound, as shown below. Remember this call log will be stored in Agile CRM so an outbound call in Unity is an inbound call in Agile CRM, because we have called the contact.

The call note will be saved against that contact in the CRM platform, please note that you can specify whether to close the status of the call log entry in the CRM platform or keep it open by ticking the box.



We can now add further notes manually, then click OK to save the call log entry. If we click Show CRM Contact or Cancel the call log will not be saved. You will now see this call log entry in Agile CRM, as shown below.



3.3.2 Automatic Call Log Entry

Unity can be configured to automatically add a call log entry for any calls where a call log hasn't been manually created using the steps above. This feature is activated as shown below.

Services Settings					
Unity Settings Appearance Skin Contact Search Contact Display	Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation.				
- Current Calls	Configuration Automatic Contact Pop				
Computer/Phone Integration	COM Diskform				
- Dialing Rule					
Custom Directory Integration	Agie	~			
- Configuration	Domain				
Browser Integration	unityclent	.aglecrm.com			
- CRM					
- Click To Dial	Logn ID				
- Cal Notification	Jenna.wimsnurscigunicyclienc.com				
- Unity Connect	API key				
Quick Keys	zgwyio2yLubutjKCa0c9w0yXG	😨 Test			
- Key Combinations	Include contacts				
Startup	Include companies				
- Update	C show record time when rearrhing				
Instant Messaging & Presence	Snow record type when searching				
- Logging - YMPP	Automatically add call log entry				
Security	Close call log entry immediately				

Unity will automatically add call log entries when the call is released [the same time it is removed from the Active Call List in Unity]. Only basic information on the call is presented, based on the direction of the call and the Unity user that made or received the call. Agile CRM will timestamp the call internally.



This shows an unanswered call from the Agile CRM contact to the Unity user.

This shows an answered call from the Unity client to the Agile CRM contact.





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