

UNITY CRM INTEGRATION

Salesforce

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1 OVERVIEW

Unity seamlessly integrates with Salesforce.com 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 Salesforce.com (click to dial available for Salesforce Classic only).

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.

Please note that you will need Salesforce Lightning Enterprise or above in order for the CRM connector to work as the lower versions of Salesforce do not have the API integration service.

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.

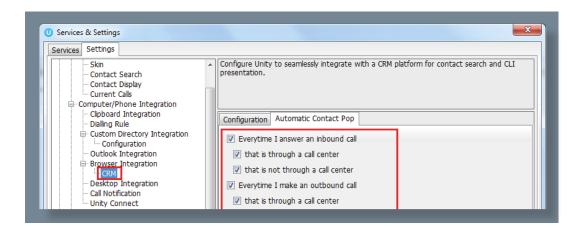
etails Branding License Details	History Log Call Center Activity		
Steve Tutt License Us	age		
All licenses assigned to this user. A use	r can have only one permanent license per application. When adding a	new permanent license, all existing permanent licenses for	r the same application
Include Inactive	License	Start Date	EndDate
View	UnityAgent Enterprise	2014.06.24	Active Licens
View	UnityCrmIntegration Standard	2016.09.12	Active Licen
View	UnityDashboard Standard	2016.06.24	Active Licens
View	UnityDesktop Enterprise	2013.08.19	Active Licens
View	UnityMobile Standard	2015.09.03	Active Licens
View	UnityReception Enterprise	2015.04.16	Active Licens
	UnitySupervisor Enterprise	2013.05.09	Active Licens

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

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

To configure Unity to integrate with Salesforce.com, 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 SALESFORCE.COM INTEGRATION

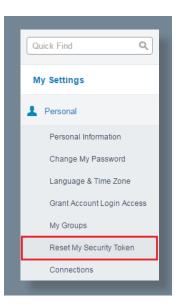
Please note that Unity is only able to consume the Salesforce.com API if the appropriate Salesforce.com license/edition is in use, please speak to Salesforce.com for more information.

The Salesforce.com API requires a security token which must be requested through the Salesforce.com portal and is emailed to the logged in user. In order to request this security token and setup Unity please follow the below steps.

Profile			
Settings			
tch to Lightning	Experience M	y Settings	
i	veloper Console	veloper Console itch to Lightning Experience	veloper Console itch to Lightning Experience My Settings

Step 1

Log into Salesforce.com and click 'My Settings' in the top-right corner.

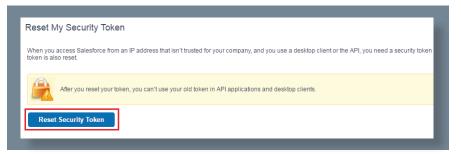


Step 2

On the left hand menu under Personal, click the 'Reset my Security Token' link. If you don't see this link you may not have the required license assigned, please speak to your Salesforce.com sales agent for more information.

Step 3

Confirm that you want to reset the security token.



Step 4

You will shortly receive an email with the new security token, as below.



Step 5

Go to Unity Settings and select Salesforce.com as the CRM platform. You will then be able to enter the login ID and password that you use when logging into Salesforce.com, as well as the security token from the email, please make sure you copy this directly from the email and paste it directly into the correct box in Unity, as shown below.

Services & Settings	
ervices Settings	
Unity Settings Contact Search Contact Display Current Calls	Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation.
Computer/Phone Integration	Configuration Automatic Contact Pop
··· Dialling Rule	CRM Platform
Custom Directory Integration Configuration	Salesforce
Outlook Integration Frowser Integration	Login ID
- CRM	jenna.wimshurst@kakaposystems.com
Click To Dial	Password
Notification	*****
Unity Connect	Security token
Key Combinations	dvBmi1gzJgDzv8A5iCu7NvTAZ
Commands Startup	☑ Include contacts
- Update	☑ Include leads
Instant Messaging & Presence	☑ Include accounts
	── Show record type when searching
Security	Automatically add call log entry
Connection	

You can also choose whether to include contacts, leads and/or accounts from Salesforce.com, in most cases all three would be selected.

Unity can also include the record type when showing a contact from Salesforce.com, making is easy to identify inbound calls from leads.

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

Lastly, Unity allows the user to add a call log entry into Salesforce.com for any call, assuming the remote party was found in Salesforce.com. This feature is outlined further below, but you can also configure Unity to automatically add a call log entry if one hasn't been added manually. This includes both inbound and outbound calls and even calls that were unanswered.

Contacts	Call Logs	Voicemail	Abandoned Calls				
Search	Natalie		Q				
Name							
Vatalie Maines (Salesforce Contact)							

Step 6

Click on the Automatic Contact Pop tab to configure these parameters, then click Save. You will be able to test the integration by performing a search for a contact within Unity, you should see Salesforce.com records appear in the list as well as from all other

directories. If in doubt you may want to activate the 'Show record type when searching' setting in order to distinguish between Salesforce.com records in the search results.

3 UNITY CRM FUNCTIONALITY

3.1 CONTACT POP

Unity will use Salesforce.com to identify inbound and outbound calls, including queued call center calls.

At any time, you can search for CRM contacts from within Unity and perform click to dial (click to dial available for Salesforce Classic only) to make an outbound call to the contact, or display the contact in the CRM platform (this is referred to as 'popping' a contact) as shown below.

Contacts	Call Logs	ogs Voicemail Abandoned Calls Agent/					
Search	Natalie			Q			
Name	е				Ph		
📞 Natal	lie Maines (Salesforce C	Con' 🐫	Call numb	er		
				Send emai	I		
			_	Show CRM	l contact		
				Copy num	ber		
			-	Personal d	irectory +		
			ø	Manage us	ser list		
				Appearance	e ►		

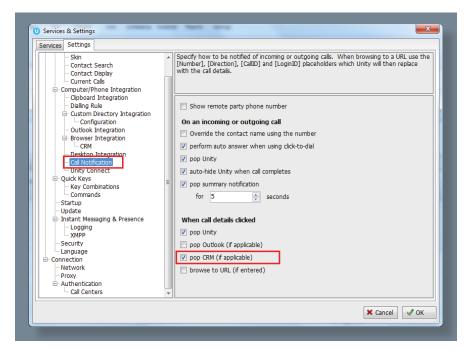
You can also right-click a call to pop the record in Salesforce.com using the default browser, as shown below. This assumes the contact was found in the CRM platform rather than another directory (for example an Outlook contacts folder).

From	То		Duration
Natalie Maines (Salesforce Contact)	Jenna Wimshurst		00.21
		Assign call to acc	ount code
		+ Add number to p	ersonal directory
		Show CRM conta	ct
		Add CRM call log	j entry
		Reset column wit	dths
Contacts Call Logs Voicemail Abandoned Call	a Agent Activity	Show gridlines	

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



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.

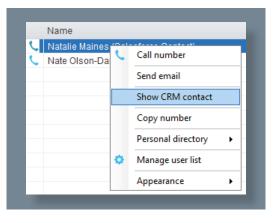
envices Settings Settings Settings Solution Solution	E	Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation. Configuration Automatic Contact Pop Image: Configuration Configuration Image: Configuration Configuration <t< th=""></t<>
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3.2 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 Salesforce. com and return results. You can search on contact name or company name, as shown below. Simply double click an entry to call that number.

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

salesforce	earch	Search				Supervisor: J lessaging	enna Wi Tools		Available (duration: 2	21:08:05)		
Home Contacts Accounts	Leads Opportuniti	es Reports	Dashboards	Cha	Q			۲		!!!	00	Q	
Ms. Sally W	/ainwright				Name			Total Ca	ills	Answ	rered Calls		Mis
					Bolts			0			0		
Click to add topics:					Nuts :			0			0		
						omer Suppor er Support	t				-		
					OPanne	er Support		-			0		
Lead Detail								0			0		
	Lead Status	New			From	n				т	0		
	Name	Ms. Sally Wainv	wright										
	Title												
	Email				_								
	Phone	07956344419			Contacts	Call Logs	Voice	mail Aba	indoned C	alls Age	nt Activity		
	Mobile				Searc	h sally			0				
	Rating												
					Nar						Pho		
Address Information						ly Black (Sal	esforce	Contact)				8288125	57
	Address					ly Jones	lasforas	Contact			000	4 8114596	2
	Created By	Jenna Wimshur	<u>st</u> , 17/01/2017 11:	34		ly Jones (Sa ly Wainwrigh			40			8114596 5634441	
				L		ly White	i (Jaies	INICE LEAD	4)			0255569	



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

3.3 CALL LOG ENTRY

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

3.3.1 Manual Call Log Entry

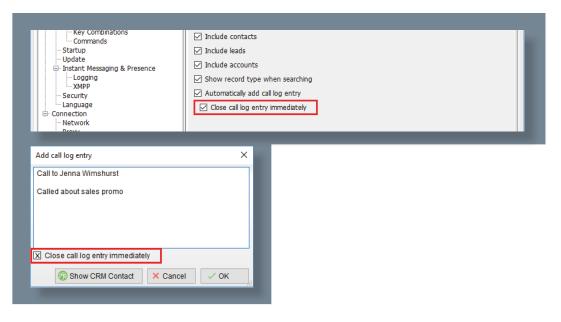
Right-click on a call and select to add a call log entry, as shown below.

	From	То	Duration	
Л	Natalie Maines (Salesforce Contact)	Jenna Wimshurst	01:05	
			Assign call to account code	۲
			+ Add number to personal directory	
			Show CRM contact	
			Add CRM call log entry	
			Reset column widths	
_			Show gridlines	

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

You can also add further notes manually, then click OK to save the call log entry.

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



If you click Show CRM Contact or Cancel the call log will **not** be saved.

You will now see this call log entry in Salesforce.com, as shown below.

Home	Contacts	Accounts	Leads	Opport	unities	Reports	Dashboards	Chatter
1	Task Call							
Click t	o add topics:	0						
1		1 7 31						
Task	Detail							Edit Delete
🔻 Tasl	k Informatio	n						
				Subject	Call			
			Assi	gned To	K Jenna	a Wimshurst		
				Name	Sally Wa	inwright, kaka	apo <u>Systems</u>	
			Cor	nments	Call mad	e to Jenna W	ïmshurst	
					Called at	oout sales pro	imo	

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.

Configuration Automatic Contact Pop
CRM Platform Salesforce Login ID Jenna.wirshurst@kakaposystems.com Password Security token dv9mi1gJgDzv8ASCu7NvTAZ Toclude contacts Include contacts Include accounts Show record type when searching Automatically add call log entry C 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. Salesforce. com will timestamp the call internally.

This shows an unanswered call from the Salesforce.com contact to the Unity user.

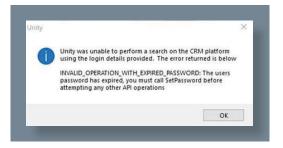
		Search	Search							
Click to add topics: Click to		Leads Opportunitie	s Reports	Dashboards	Chatter	Files	Products	Forecasts	+	
I 7 31 Attachments Task Detail Edit Delete Create Follow-Up Task Create Follow-Up Event * Task Information Subject Call Call <td></td>										
Attachments Task Information Edit Delete Create Follow-Up Task Create Follow-Up Event * Task Information Subject Call	Click to add topics: 🕜									
Task Detail Edit Delete Create Follow-Up Task Create Follow-Up Event * Task Information Subject Call Assigned To © Chris Tutt Name Toby Southfield Comments Call made to Chris Tutt (Unanswered)	1 7 31									Attachments [[
Subject Call Assigned To Chris Tutt Name Toby Southfield Comments Call made to Chris Tutt (Unanswered) Additional Information Priority Normal Completed System Information 	Task Detail					Edit De	elete Create	Follow-Up Task	Create Follow	
Assigned To Chris Tutt Name Toby Southfield Comments Call made to Chris Tutt (Unanswered) Additional Information Priority Normal Status Completed System Information	▼ Task Information									
Name Toby Southfield Comments Call made to Chris Tutt (Unanswered) ▼ Additional Information Priority Status Completed ▼ System Information Value		Subject	Call							
Comments Call made to Chris Tutt (Unanswered) ▼ Additional Information Priority Priority Normal Status Completed		Assigned To	Chris Tutt							
		Name	Toby Southfiel	<u>d</u>		-				
Priority Normal Status Completed		Comments	Call made to C	hris Tutt (Unans	wered)					
Status Completed	 Additional Information 									
▼ System Information		Priority	Normal							
		Status	Completed							
	▼ System Information									
Created By <u>Chris Tutt</u> , 29/09/2016 18:42		Created By	Chris Tutt, 29/	09/2016 18:42						

This shows an answered call from the Unity client to the Salesforce.com contact.

salesforce	earch		Search							
°16										
ome Contacts Accounts	Leads Opp	ortunities F	Reports [Dashboards	Chatter	Files	Products	Forecasts	+	
Click to add topics:										
Task Detail						Edit	lete Create I	Follow-Up Task	Create Follo	Attachments (0
▼ Task Information										
		Subject Call								
	Assi	ned To 🛛 😐 🤇	Chris Tutt							
		Name Toby	Southfield							
	Cor	nments Call	received fro	m Chris Tutt						
▼ Additional Information										
		Priority Norr	nal							
		Status Con	pleted							
▼ System Information										
	Cre	ated By Chri	<u>s Tutt</u> , 29/09/	2016 18:44						

4 TROUBLE SHOOTING

If a user gets an error message from Unity saying that it couldn't integrate with Salesforce, even though the test succeeded in Unity Settings, this is because the Salesforce password has expired.



Simply login to Salesforce and you will be prompted to create a new password as the old one has expired. Update Unity with the new password and restart.



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