Unity: AGILE.COM CRM INTEGRATION

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.

UNITY CRM CONNECTOR

The Unity CRM Connector service must be assigned in Uboss to the user. If the user already has Unity they will need to uninstall and reinstall the latest version. This will keep their login credentials from the previous install


App-Unity CRM Connector

Once this license is assigned and Unity is restarted, the CRM panel will become available in Settings, as shown below.
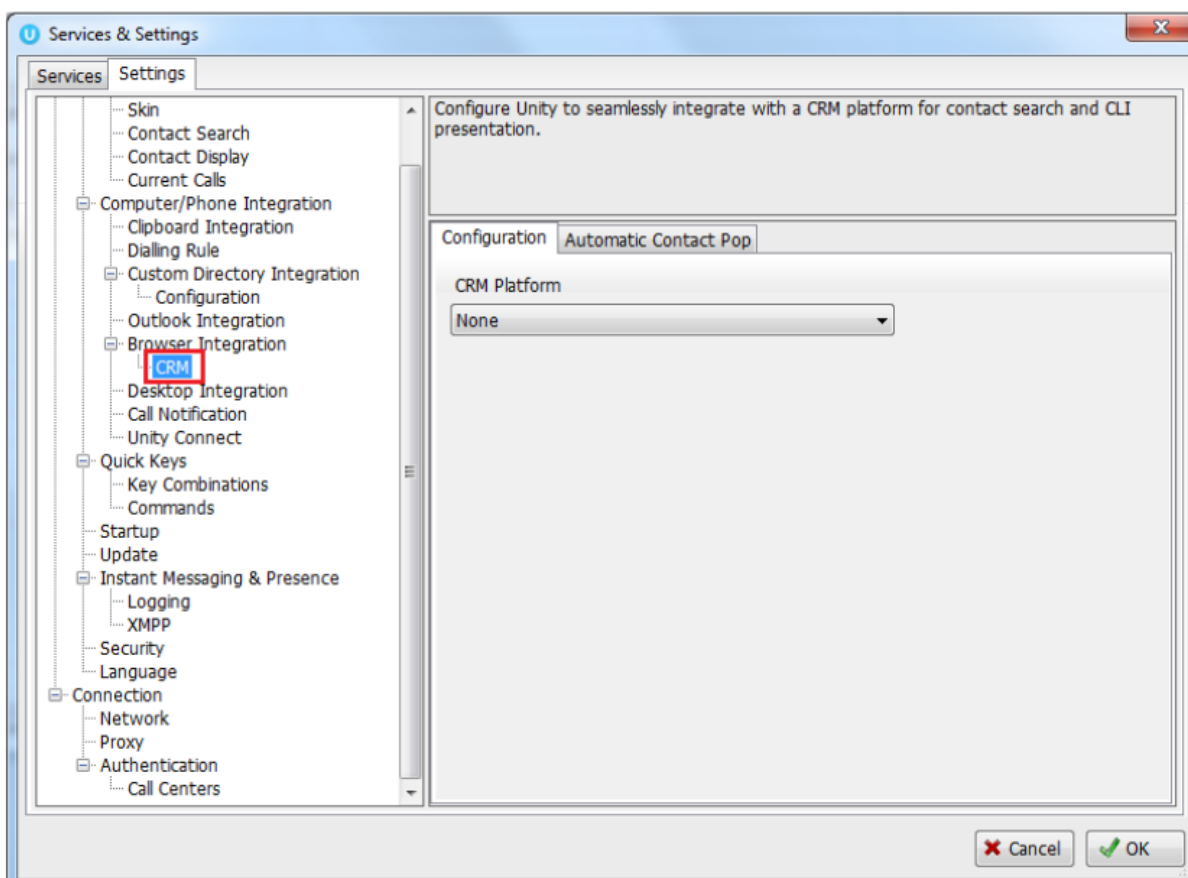
To configure Unity to integrate with a CRM platform, simply select the CRM platform from the dropdown list and complete the required fields, as outlined in sections below.

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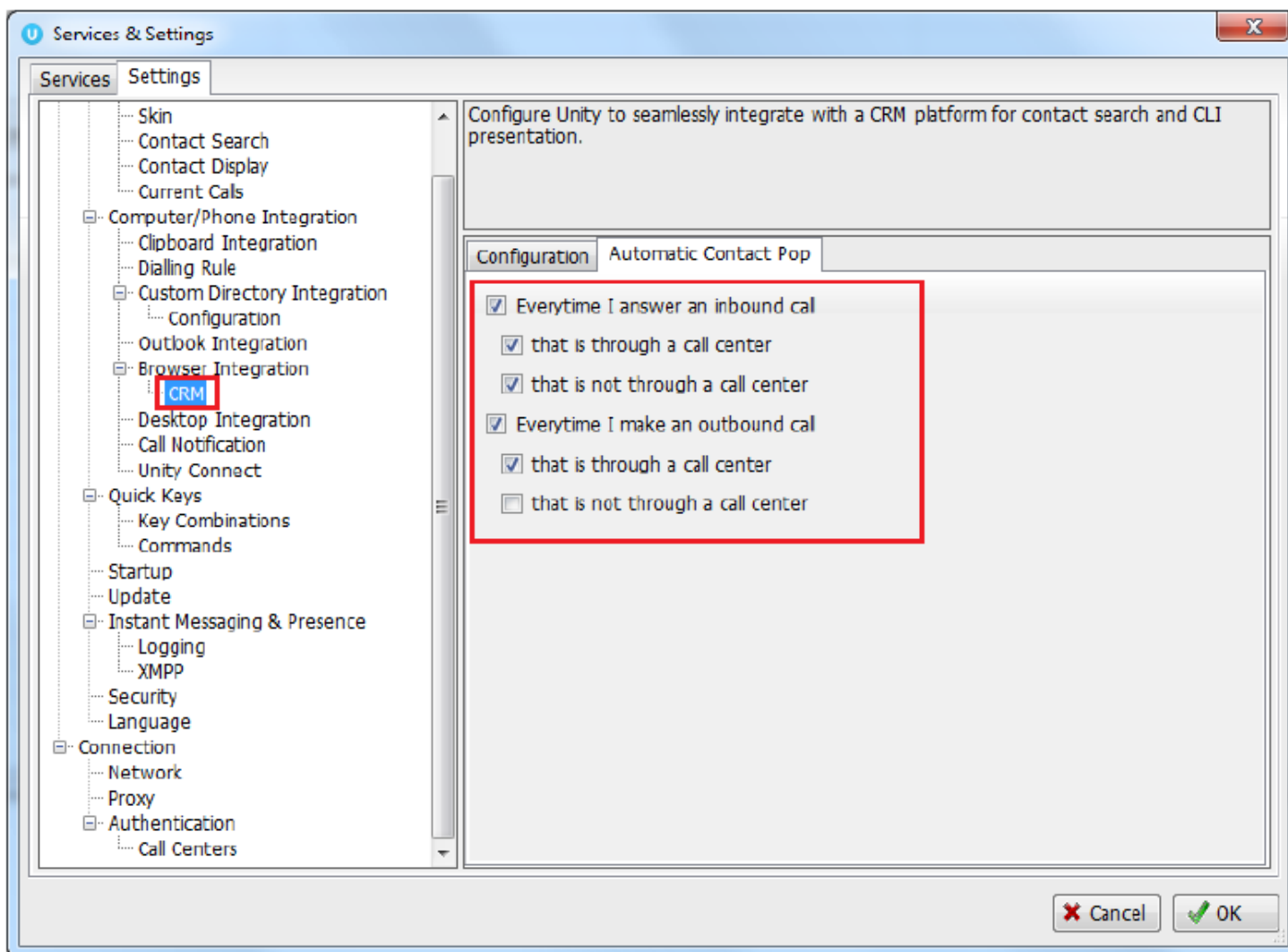

CONFIGURING AGILE CRM INTEGRATION

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. Log into Agile CRM and click on 'Admin Settings' under the account button in the top-right corner
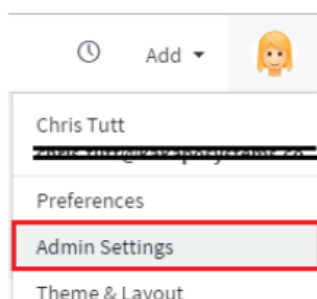
2. Click on "API & Analytics" from the menu on the left, then copy the REST API field from the webpage, as shown below. Please be sure to capture all text, it may be helpful to paste to Notepad to ensure you have all characters [without formatting] before pasting into Unity.
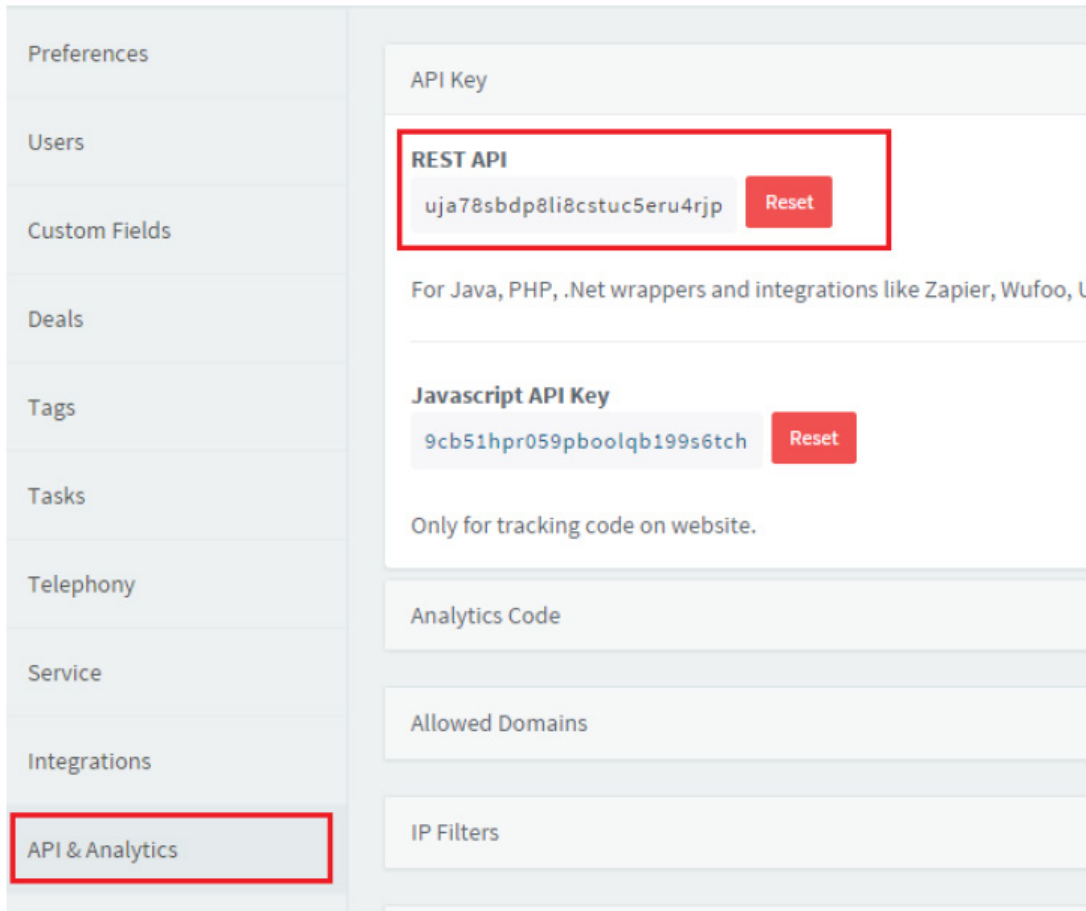
3. Go to Unity Settings and select Agile CRM as the CRM platform. You will then be able to enter the login ID and password that you use when logging into Agile CRM, as well as the API key that you have copied from the webpage.
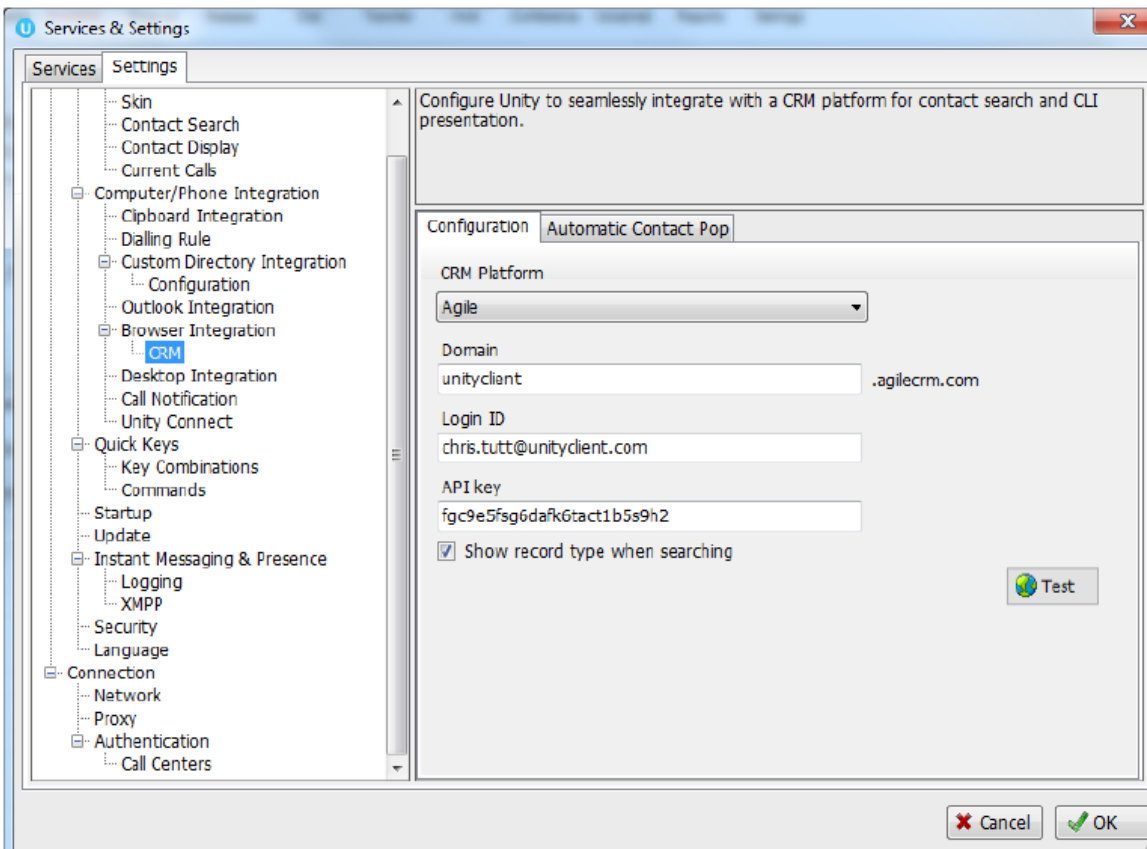
Click the test button to save and test the log in details.

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.
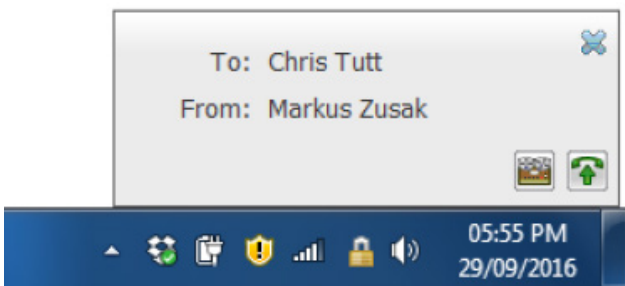
CONTACT POP

Unity will use Agile CRM 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 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.
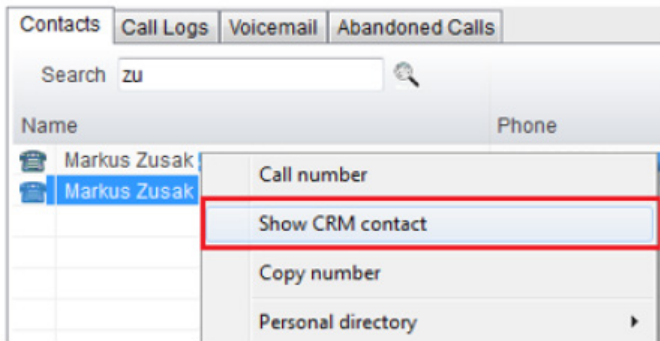

You can also right-click a call to pop the record in Agile CRM using the default browser, as shown below. This assumes the contact was found in the CRM platform rather than another directory (for example an Outlook contacts folder).
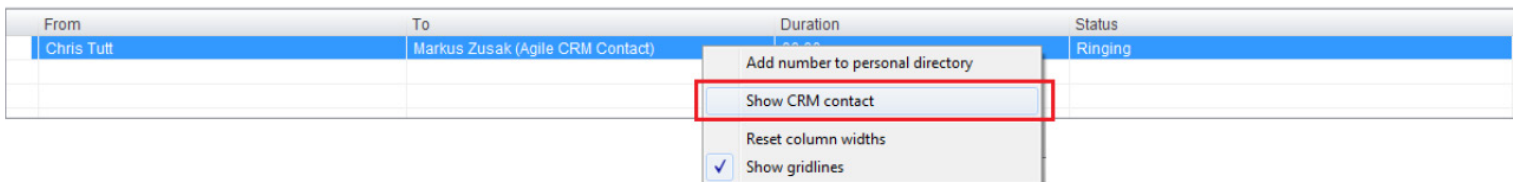

You can also click on the call details "toast" notification popup to pop the contact, as below. Again, this assumes the contact was found in the CRM platform.

This feature depends on the appropriate Call Notification setting being activated, as shown below.
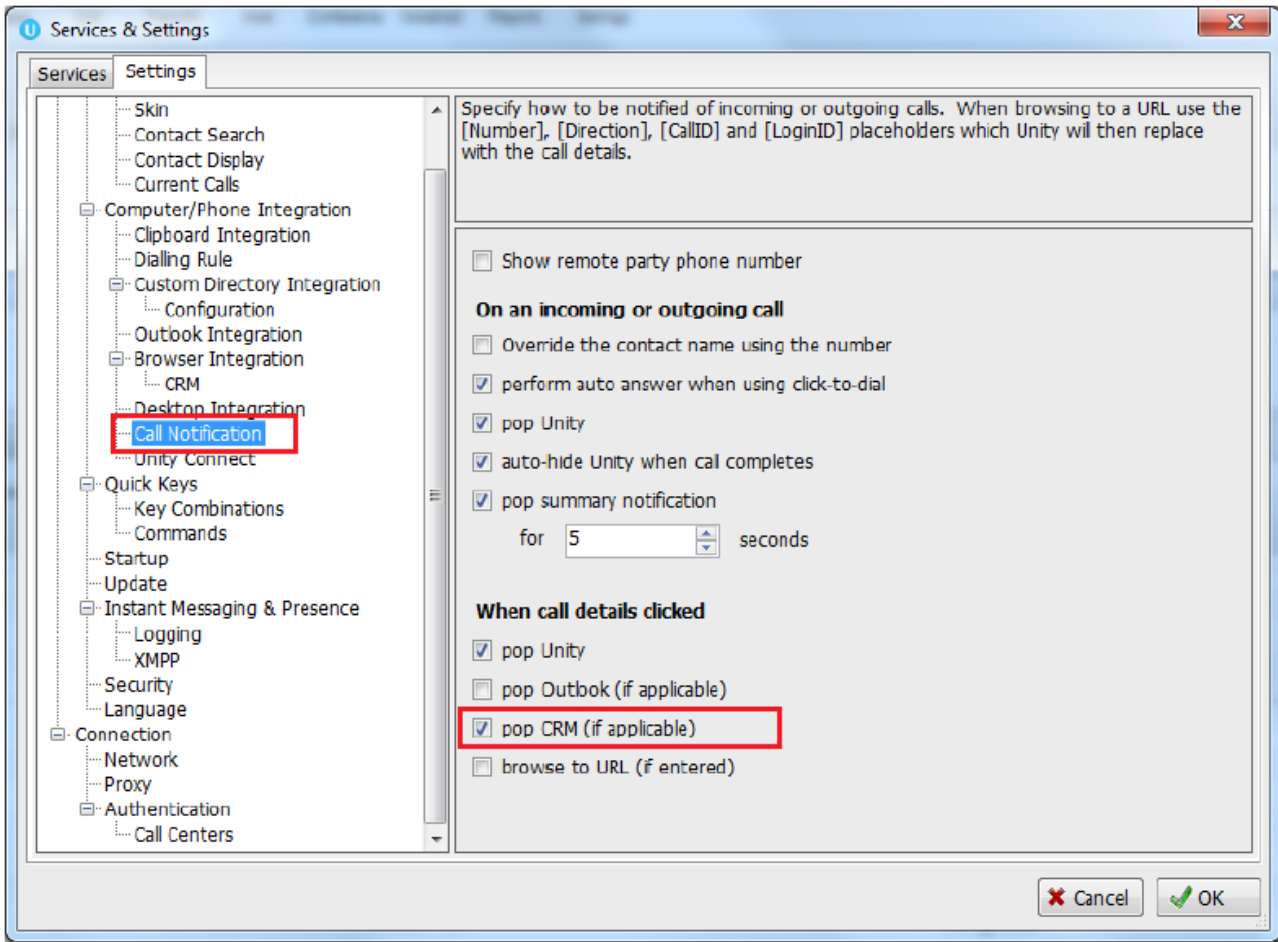
Unity can also be configured to automatically pop the CRM contact when the call is answered, which depends on the Automatic Contact Pop tab settings as shown below.
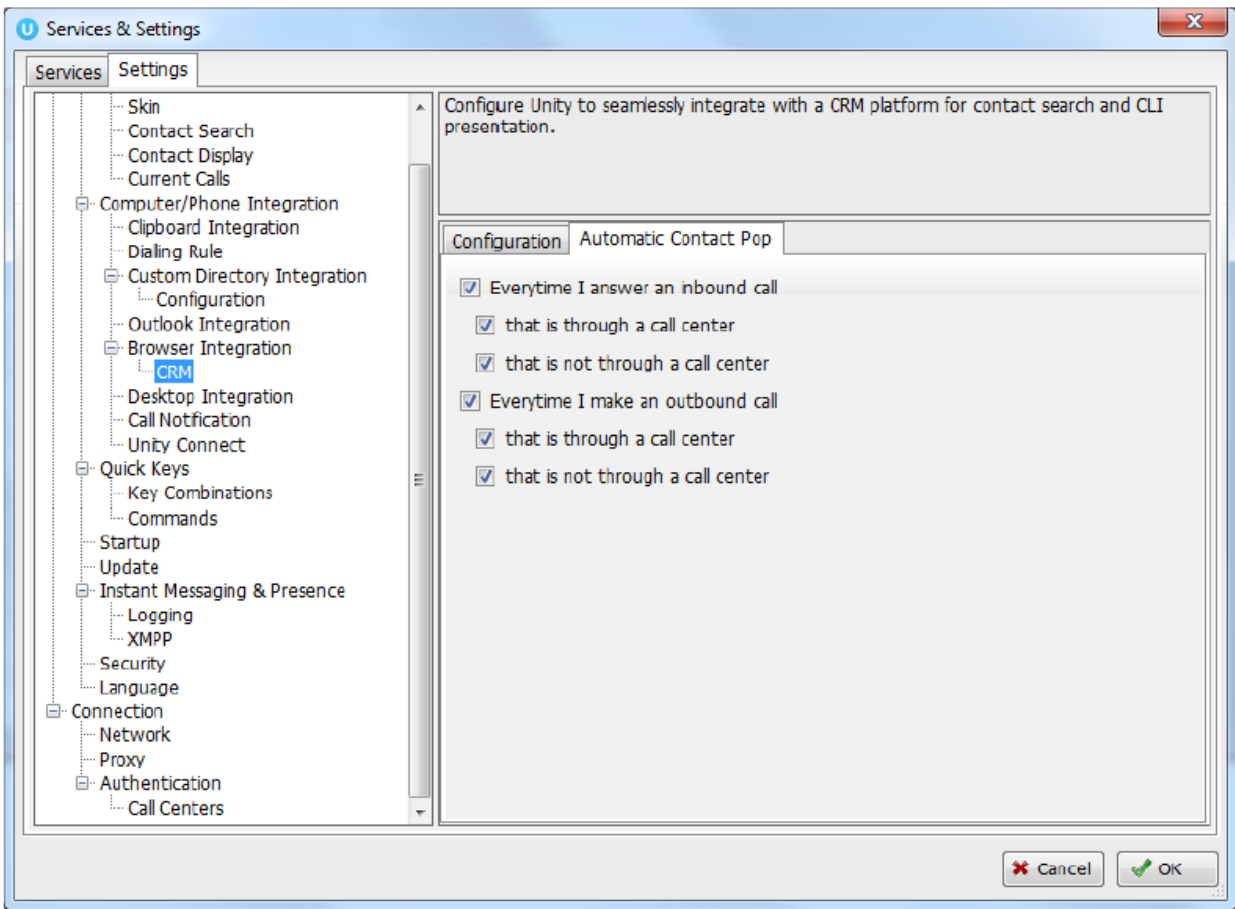
CONTACT SEARCH

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.

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

CALL LOG ENTRY

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

MANUAL CALL LOG ENTRY

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

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.

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.
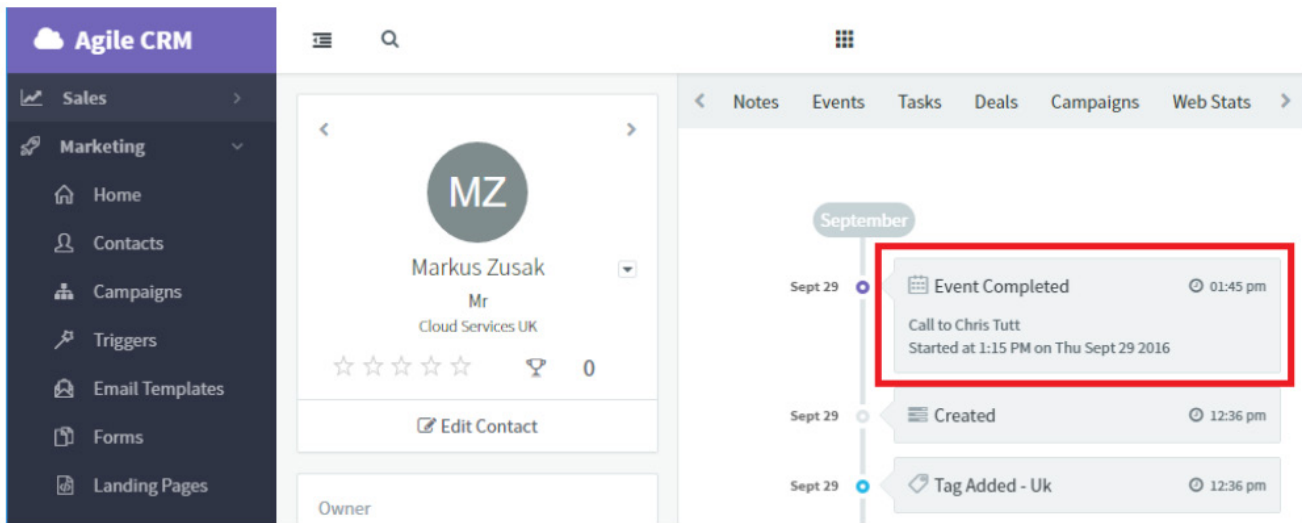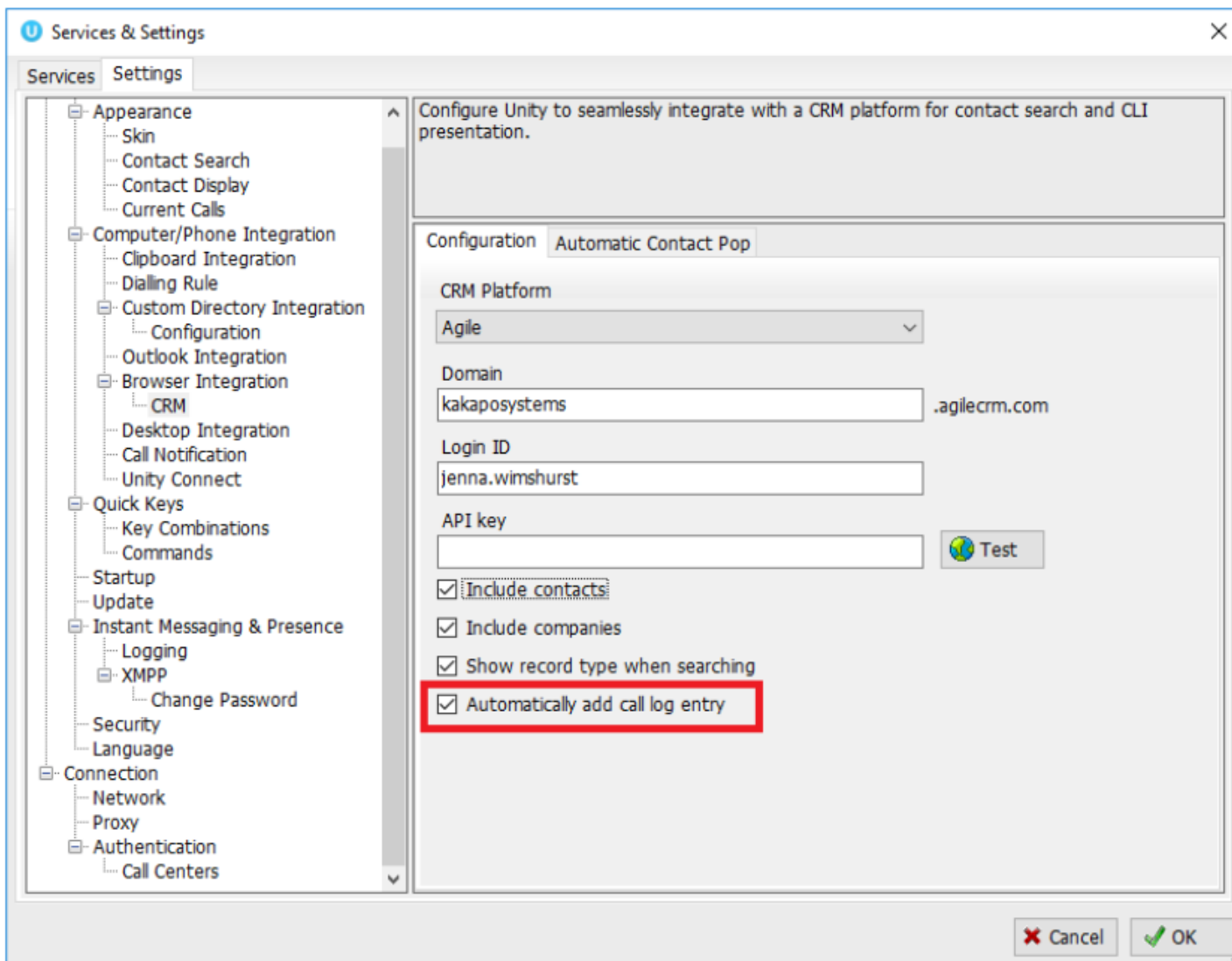

You will now see this call log entry in Agile CRM, as shown below.

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.

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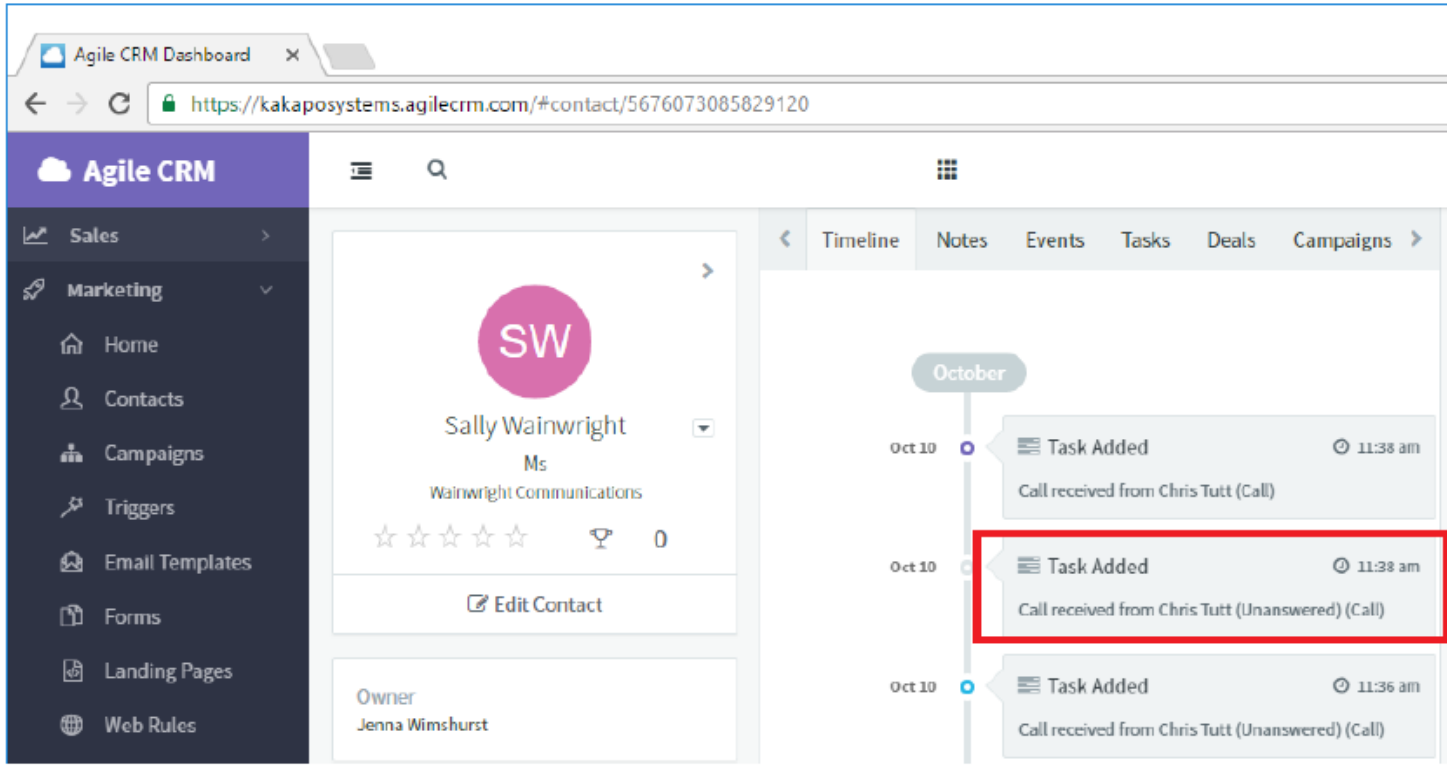
This shows an answered call from the Unity client to the Agile CRM contact.