

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.

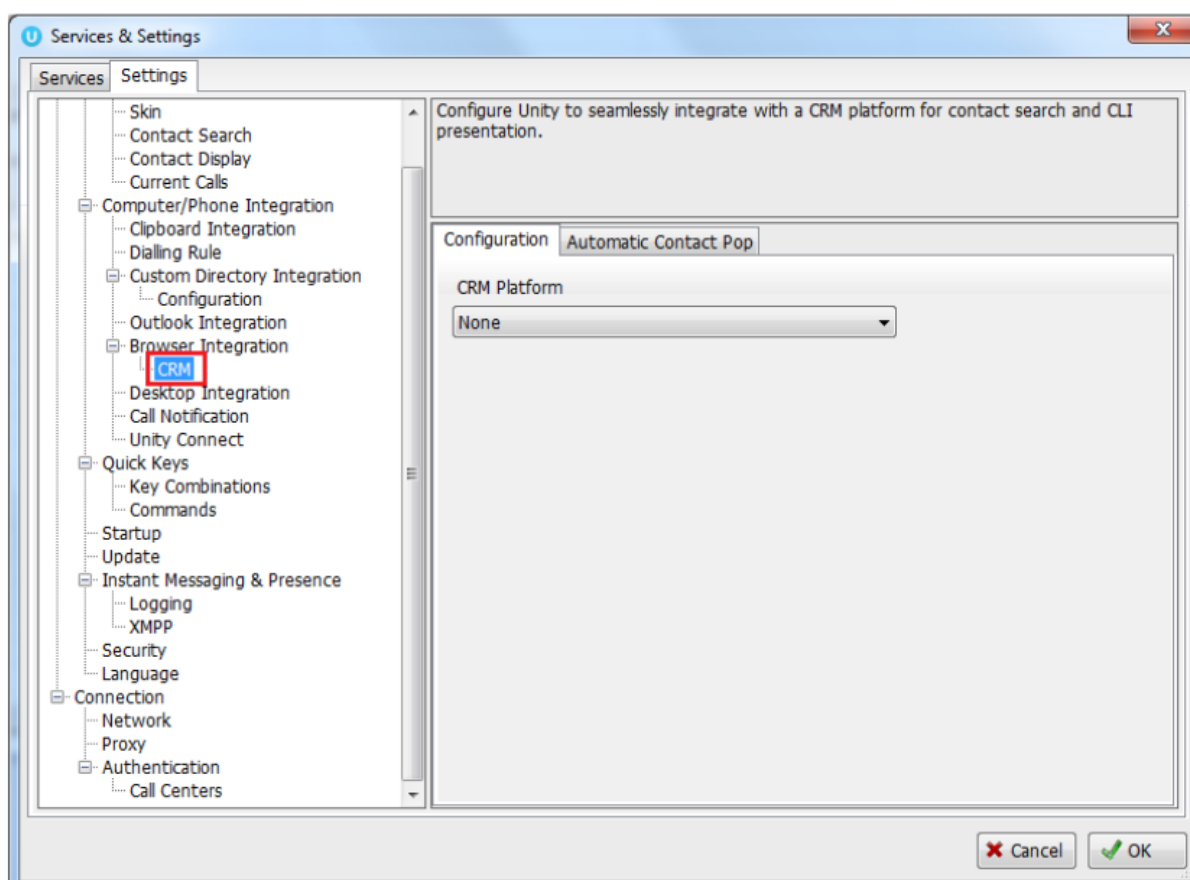
This functionality relies on a CRM Integration license being assigned to the user, as shown below. Please note this license is required in addition to the base license for Unity Desktop, Agent, Supervisor or Reception. However, this functionality is included in all trial licenses for these Unity clients.

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

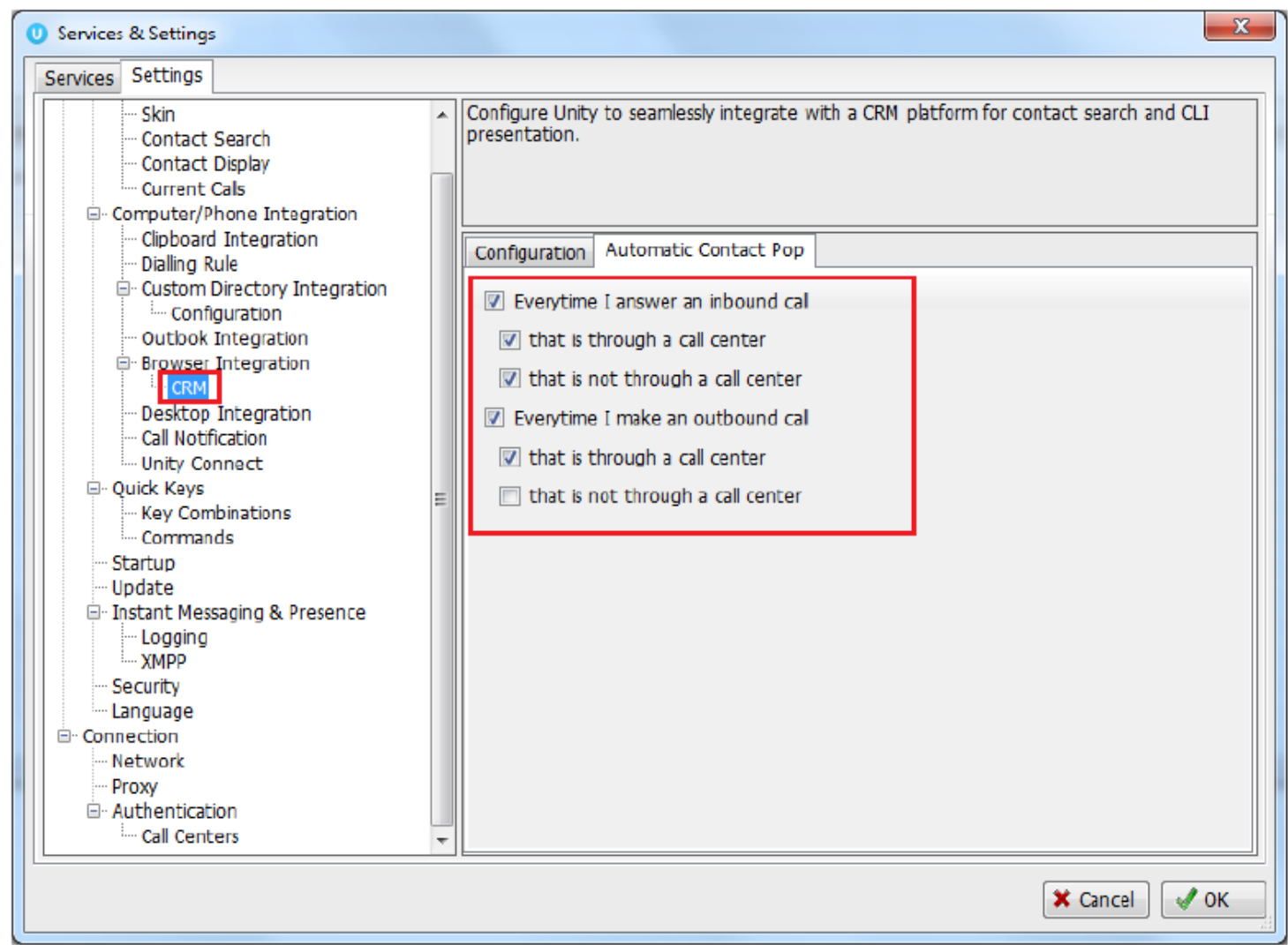


Once this license is assigned and Unity is restarted, the CRM panel will become available in Settings, as shown below.



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.

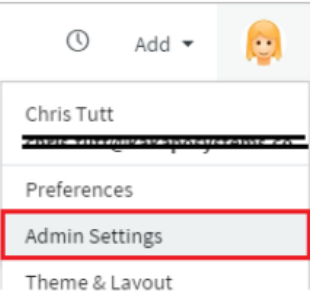
You can also configure Unity to automatically pop the CRM contact when the phone is answered, as shown below.



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.

Preferences

Users

Custom Fields

Deals

Tags

Tasks

Telephony

Service

Integrations

API & Analytics

API Key

REST API

uja78sbdp8li8cstuc5eru4rjp **Reset**

For Java, PHP, .Net wrappers and integrations like Zapier, Wufoo, U

Javascript API Key

9cb51hpr059pboolqb199s6tch **Reset**

Only for tracking code on website.

Analytics Code

Allowed Domains

IP Filters

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.

Services & Settings

Services Settings

Skin

Contact Search

Contact Display

Current Calls

Computer/Phone Integration

Clipboard Integration

Dialing Rule

Custom Directory Integration

Configuration

Outlook Integration

Browser Integration

CRM

Desktop Integration

Call Notification

Unity Connect

Quick Keys

Key Combinations

Commands

Startup

Update

Instant Messaging & Presence

Logging

XMPP

Security

Language

Connection

Network

Proxy

Authentication

Call Centers

Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation.

Configuration Automatic Contact Pop

CRM Platform

Agile

Domain

unityclient .agilecrm.com

Login ID

chris.tutt@unityclient.com

API key

fgc9e5fsg6dafk6tact1b5s9h2

☒ Show record type when searching

Test

Cancel **OK**

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
 .agilecrm.com

Instead the domain should be:

Domain
 .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.



Markus Zusak

Mr

Cloud Services UK

☆☆☆☆☆

0

Edit Contact

Owner

Jenna Wimshurst

Tags

cloud x services x uk x Add

Contact Info

01210256358

07900575695 mobile

mzusak@cloudservicesuk.com

Timeline

Notes

Events

Tasks

Deals

Unity Agent: Chris Tutt - Available (duration: 01:47:17)

File

Messaging

Tools

Help

Unavailable

Available

Wrap-up

Release

Dial

Transfer

Hold

Conference

Voic

My Statistics

Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time
Bolts Sales	0	0	0	00:00:00
Nuts Sales	0	0	0	00:00:00
	0	0	0	00:00:00

From

To

Contacts

Call Logs (1 Missed)

Voicemail

Abandoned Calls

Search

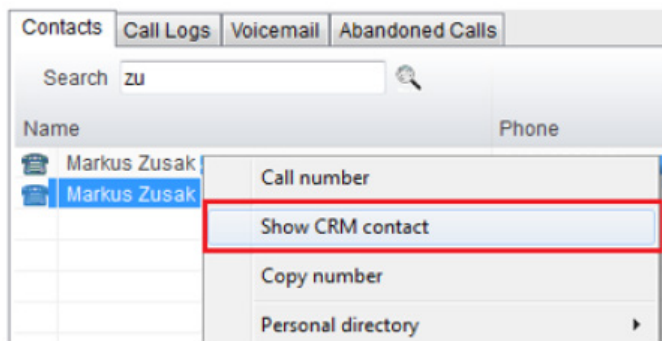
zus

Name	Phone	Department
Markus Zusak (Agile CRM Contact - Mobile)	07900575695	
Markus Zusak (Agile CRM Contact)	01210256358	

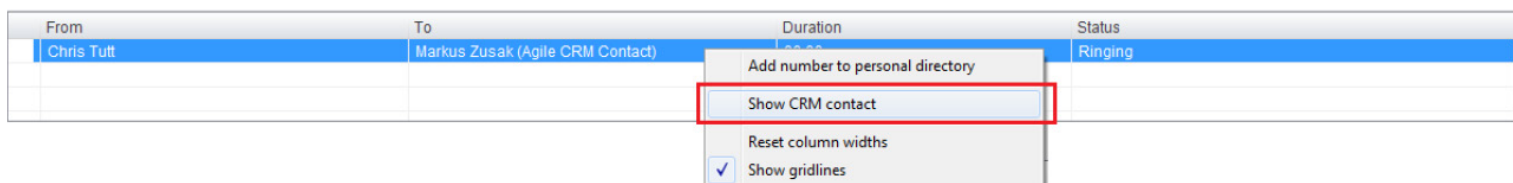
UNITY CRM FUNCTIONALITY

CONTACT POP

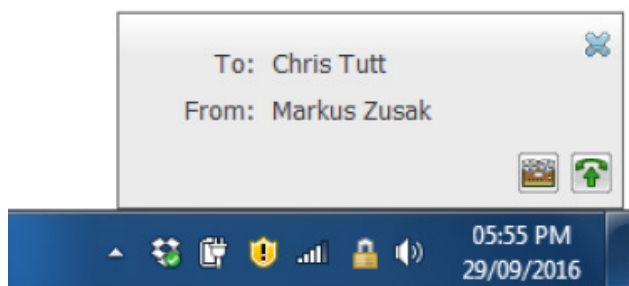
Unity will use Agile CRM to identify inbound and outbound calls, including queued call center calls. At any time, you can search for CRM contacts from within Unity and perform click to dial to make an outbound call to the contact, or display the contact in the CRM platform (this is referred to as “popping” a contact) as shown below.



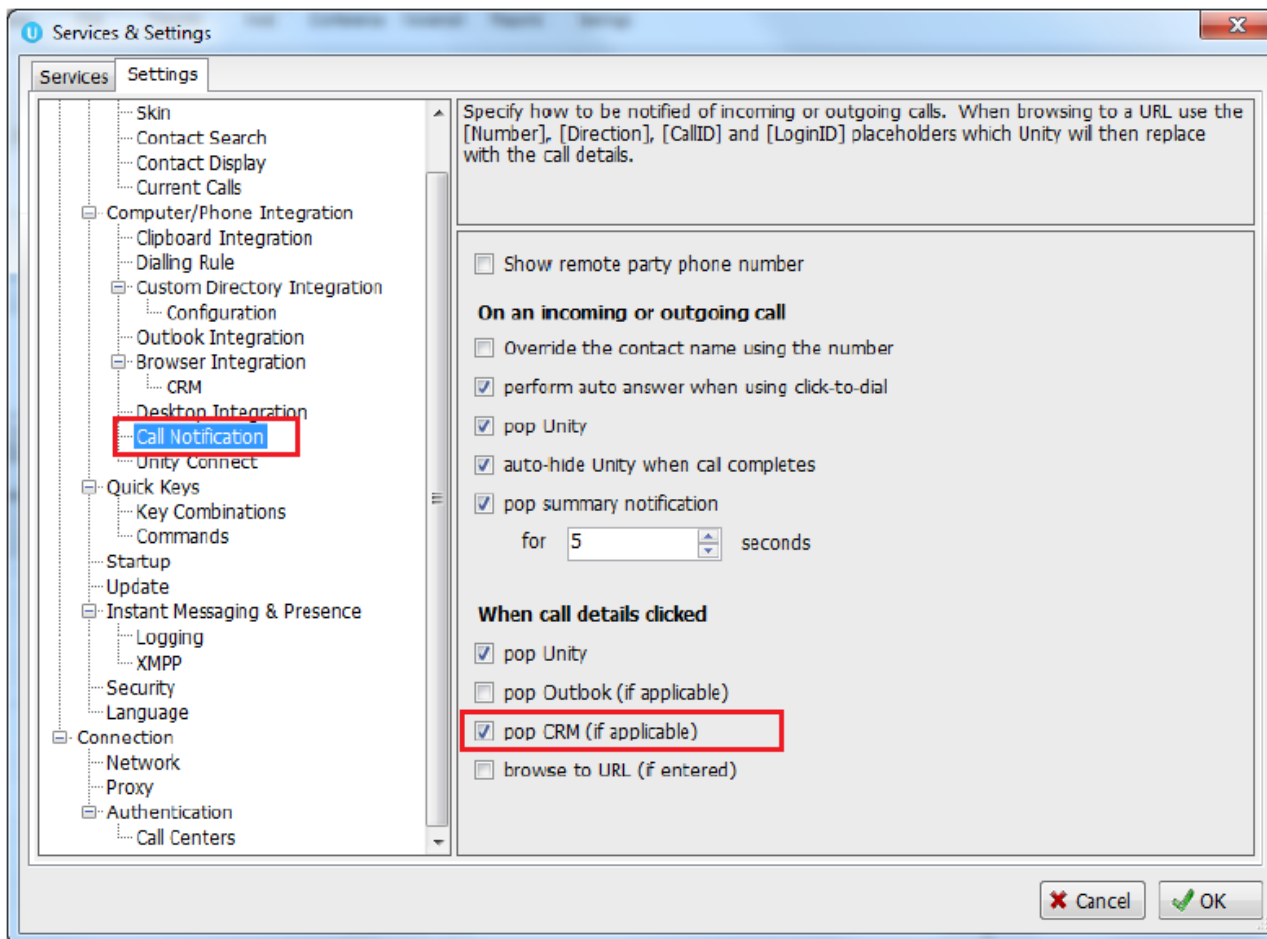
You can also right-click a call to pop the record in Agile CRM using the default browser, as shown below. This assumes the contact was found in the CRM platform rather than another directory (for example an Outlook contacts folder).



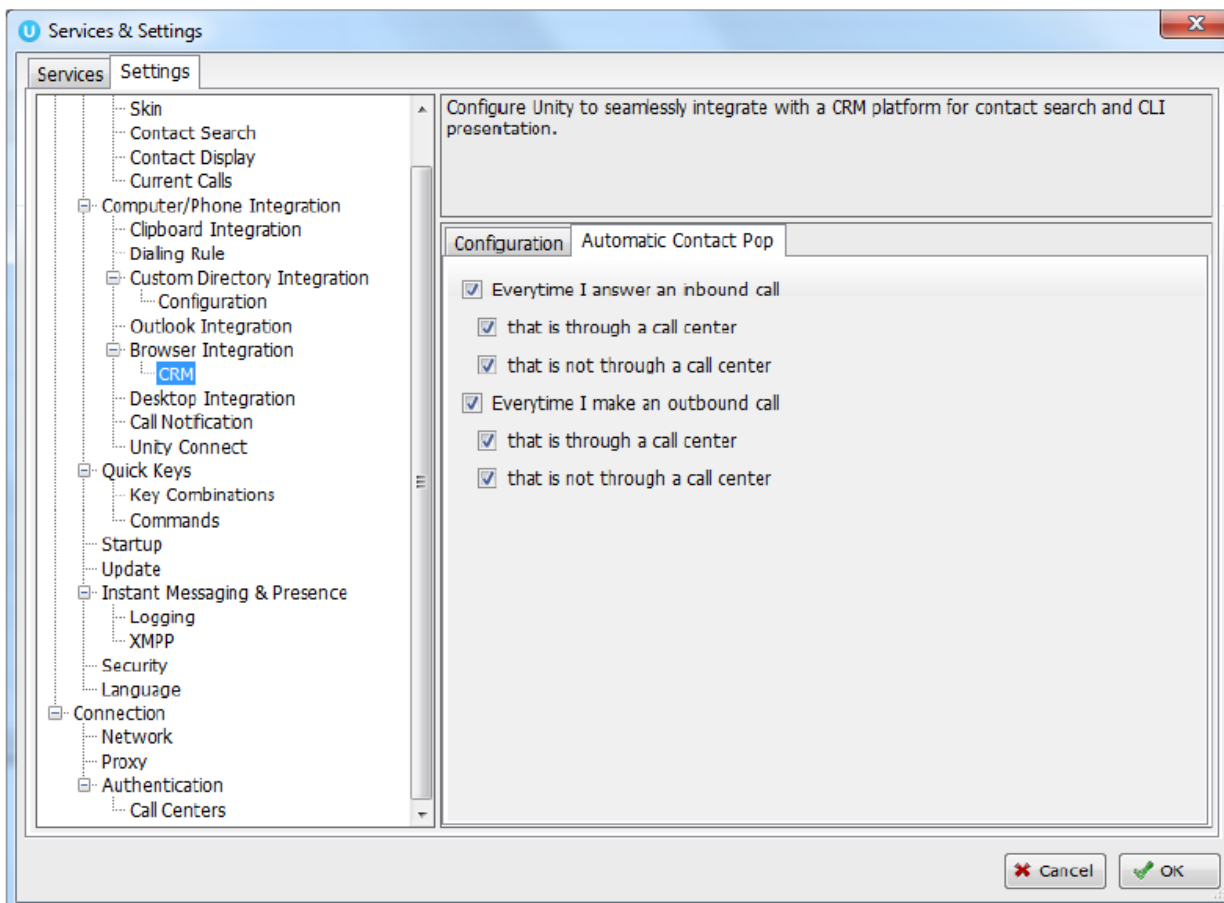
You can also click on the call details “toast” notification popup to pop the contact, as below. Again, this assumes the contact was found in the CRM platform.



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.



Caltech

★★★★★

813

Edit Company

Owner

Jenna Wimshurst

Tags

+ Add

Company Info

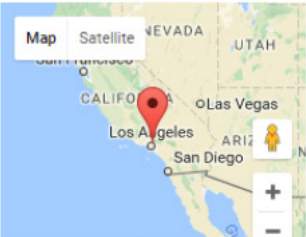
07900575695 primary

mr@caltech.edu primary

Location

1200 EAST CALIFORNIA BOULEVARD,
PASADENA, CALIFORNIA, 91125, US. office

Map



ContactsDealsNotesEventsTasks

Add Tags

Remove Tags

Add to Campaign

Send Email

Change Owner

Export as CSV

Basic Info

First Name

Last Name

AS

Andrew Sidcup

Andrew

Sidcup

BB

Bob Bryant

Bob

Bryant

Unity Agent: Chris Tutt - Available (duration: 02:39:02)

File

Messaging

Tools

Help

Unavailable

Available

Wrap-up

Release

Dial

Transfer

Hold

Conference

Voicemail

Reports

My Statistics

Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time
Bolts Sales	0	0	0	00:00:00	00:00
Nuts Sales	0	0	0	00:00:00	00:00
	0	0	0	00:00:00	00:00

From

To

Contacts

Call Logs (4 Missed)

Voicemail

Abandoned Calls

Search

calte

Name	Phone	Department	ACD Sta
Andrew Sidcup	7178987757		
Bob Bryant	6108486255		
Caltech	07900575695		

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

ContactsCall Logs (3 Missed)VoicemailAbandoned

Search

toby

Name

Phone

Toby Southfield

Toby Southfield

Call number

Send email

Show CRM contact

Copy number

V1.0

www.t8lk.co.uk

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.

From	To	Duration	Status
Chris Tutt	U	00:00	Ringing

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, 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.

Add call log entry

Call made to Chris Tutt

Show CRM ContactCancelOK

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.

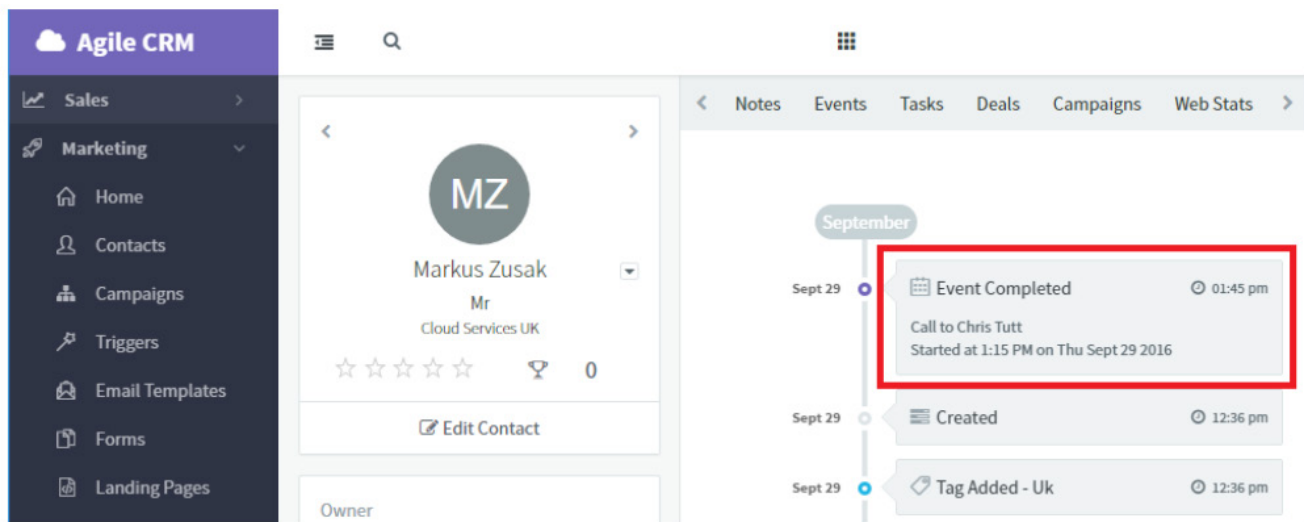
Add call log entry

Call made to Chris Tutt

Wanted to talk about the new contract, I said I would email it by Friday

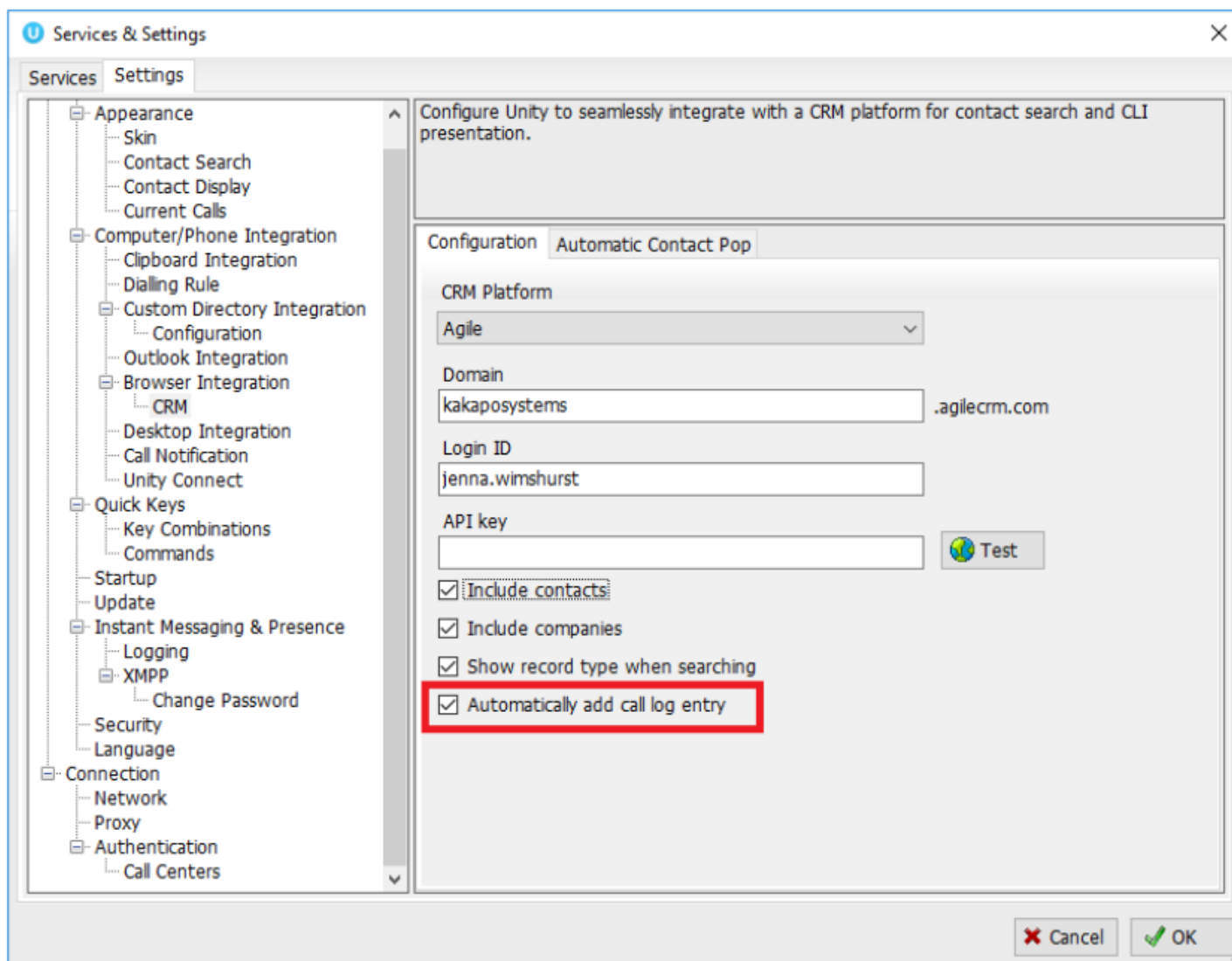
Show CRM ContactCancelOK

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



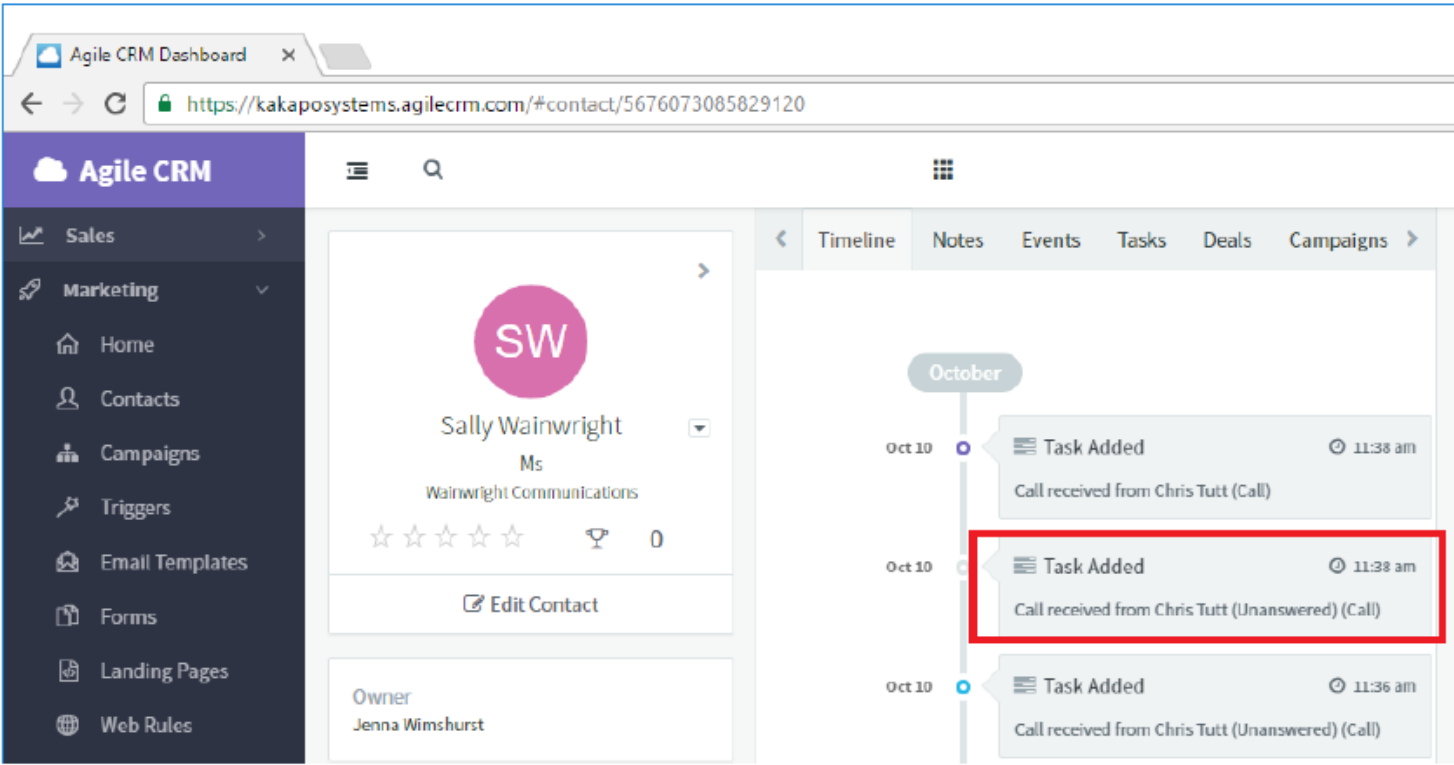
AUTOMATIC CALL LOG ENTRY

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.

