

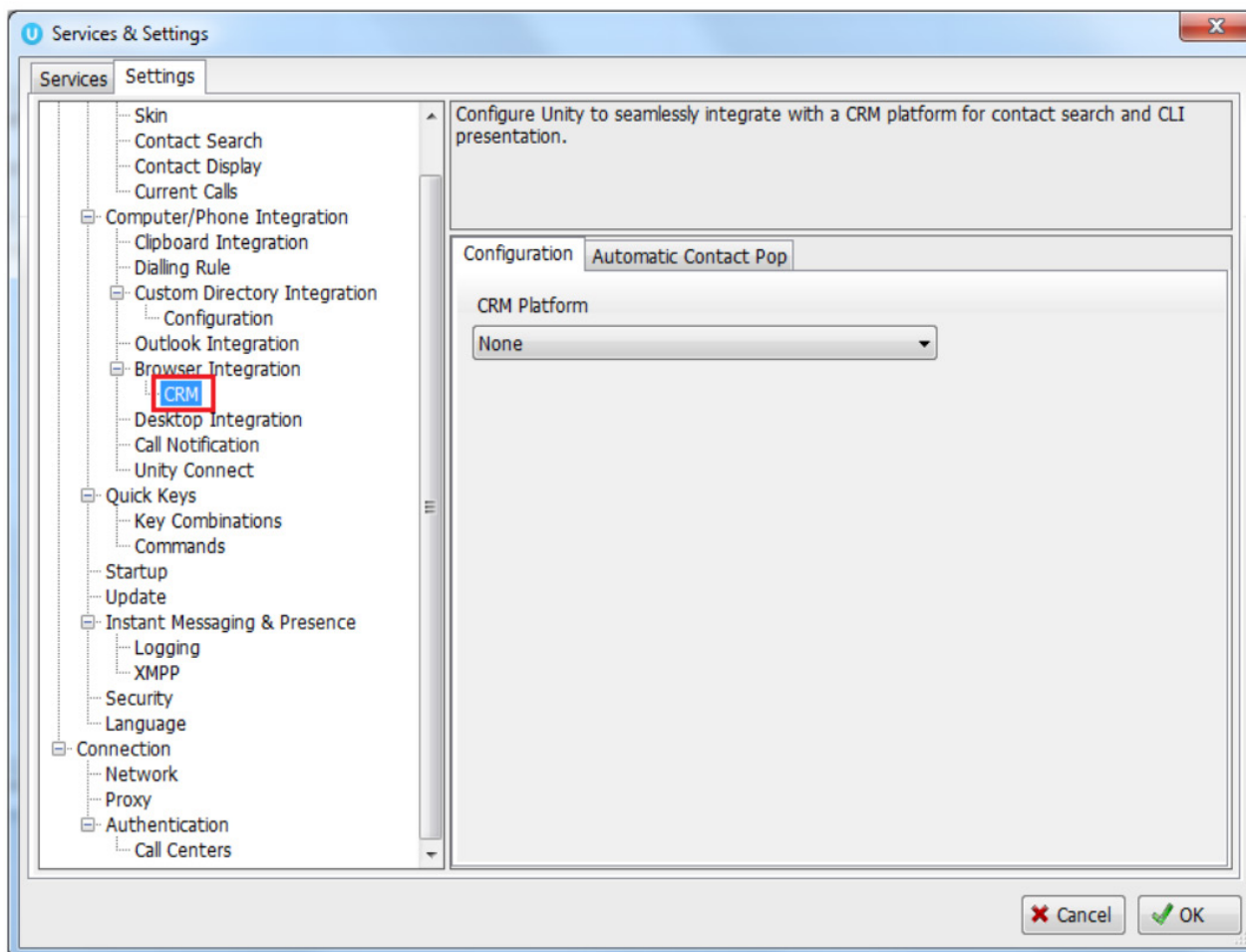
Unity: Salesforce CRM Integration

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. 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. The Unity CRM Connector service must be assigned in Uboss to the user as below. 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.

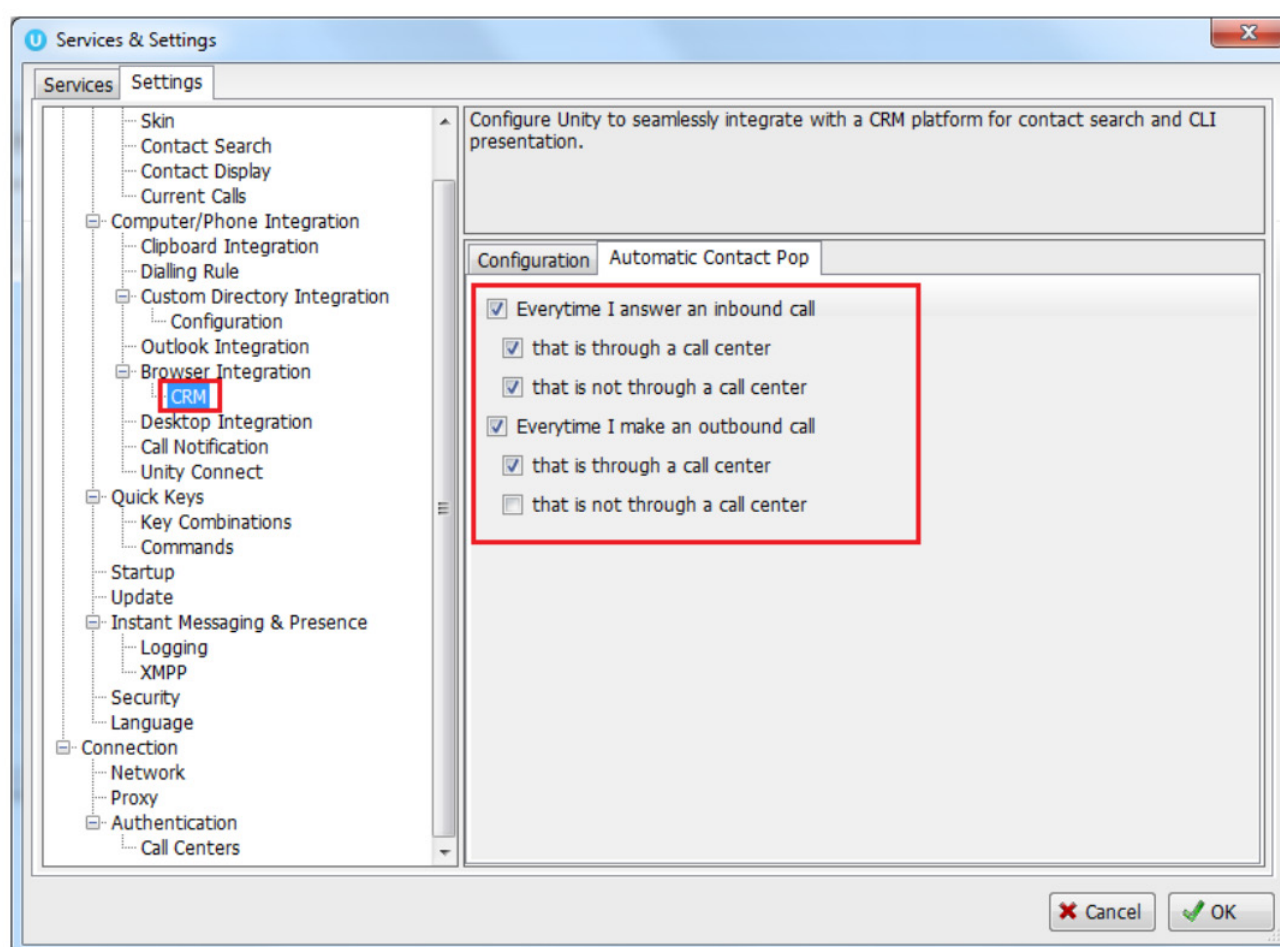


App-Unity CRM Connector



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.

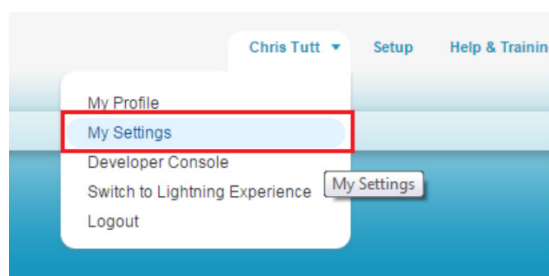


CONFIGURING SALESFORCE.COM INTEGRATION

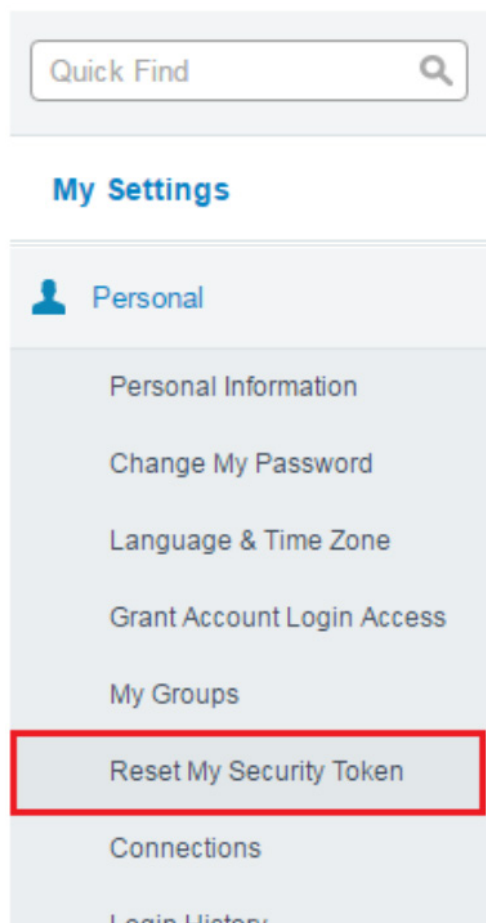
Please note that Unity is only able to consume the Salesforce.com API if the appropriate Salesforce.com license/edition is in use, please speak to Salesforce.com for more information.

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.

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



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.



3. Confirm that you want to reset the security token

Reset My Security Token

When you access Salesforce from an IP address that isn't trusted for your company, and you use a desktop client or the API, you need a security token token is also reset.



After you reset your token, you can't use your old token in API applications and desktop clients.

Reset Security Token

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

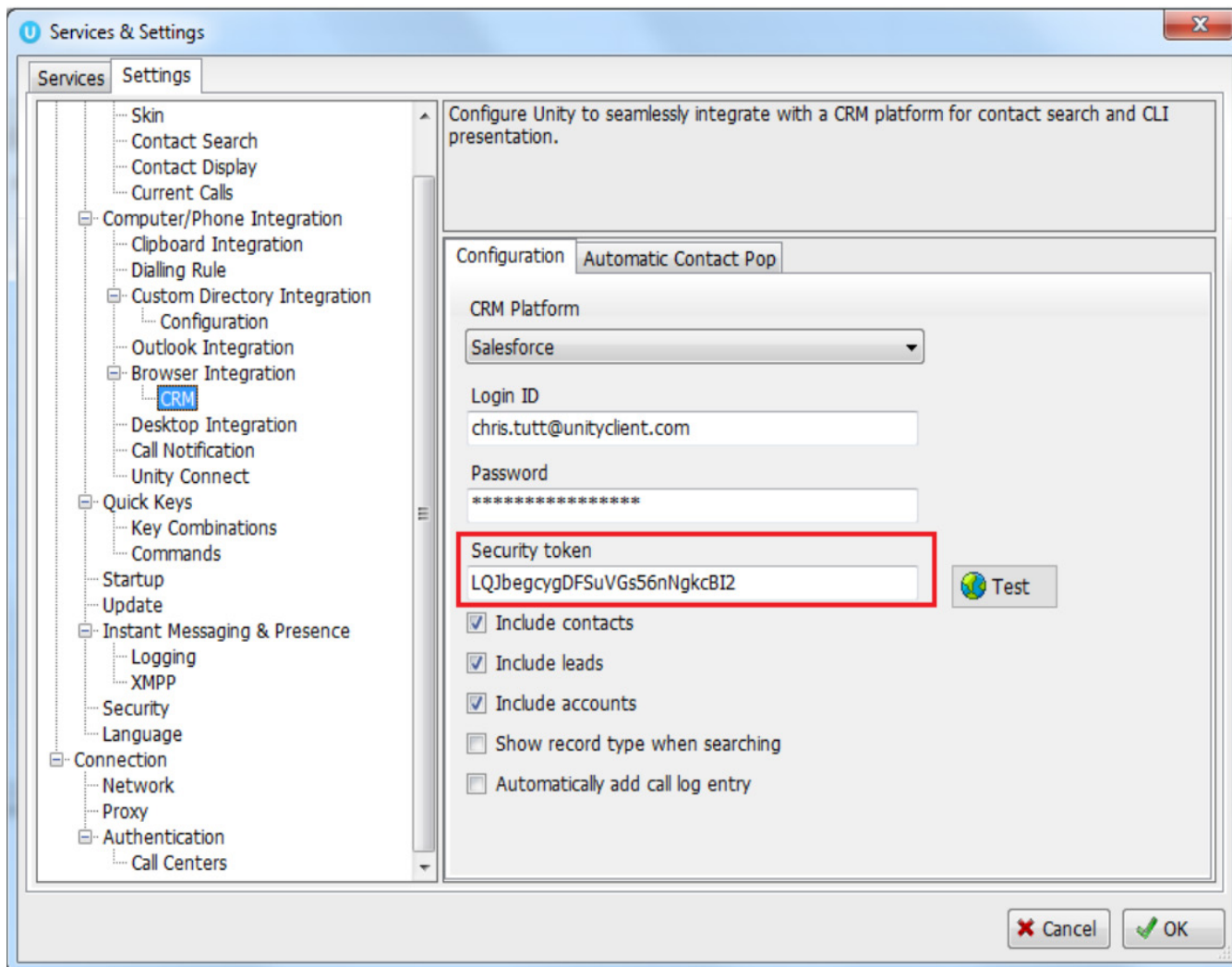
We've sent you a new Salesforce security token because you recently changed your password or requested to reset your security token. Use this updated security token with API or desktop clients that require it.

Username: chris.tutt@unityclient.com

Security token (case-sensitive): LQJbegcygDFSuVGs56nNgkcBI2

For more information on using your security token, see Reset Your Security Token at https://help.salesforce.com/HTViewHelpDoc?id=user_security_token.htm.

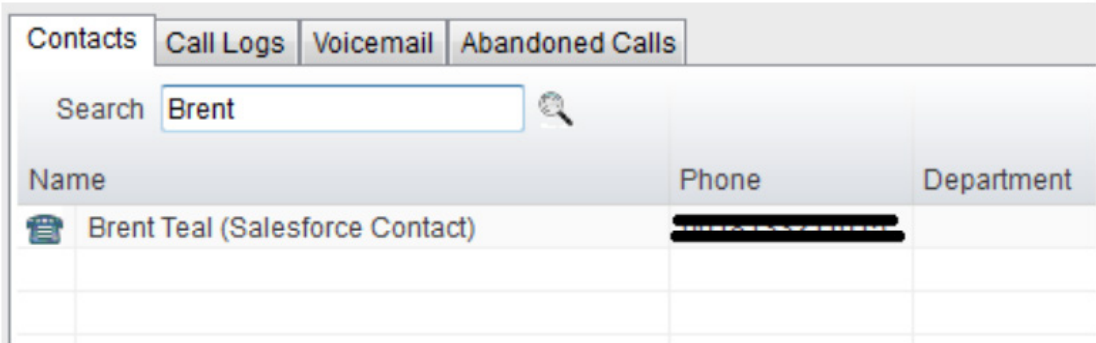
5. Go to Unity Settings and select Salesforce.com as the CRM platform. You will then be able to enter the login ID and password that you use when logging into Salesforce.com, as well as the security token from the email, please make sure you copy this directly from the email and paste it directly into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



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 it 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.

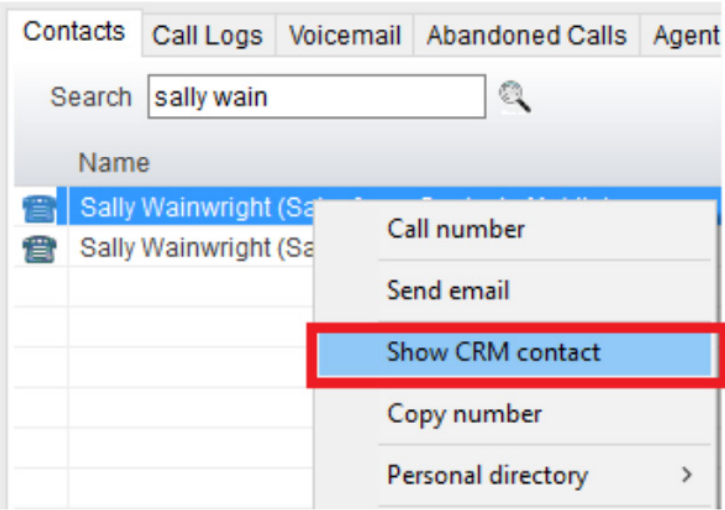
6. Click on the Automatic Contact Pop tab to configure these parameters, then click Save. You will be able to test the integration by performing a search for a contact within Unity, you should see Salesforce.com records appear in the list as well as from all other directories. If in doubt you may want to activate the “Show record type when searching” setting in order to distinguish between Salesforce.com records in the search results.



UNITY CRM FUNCTIONALITY

- 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 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 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	To	Duration	Status
Chris Tutt	Markus Zusak (Agile CRM Contact)	00:00	Ringing

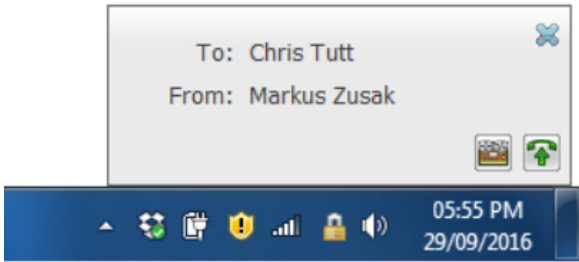
Add number to personal directory

Show CRM contact

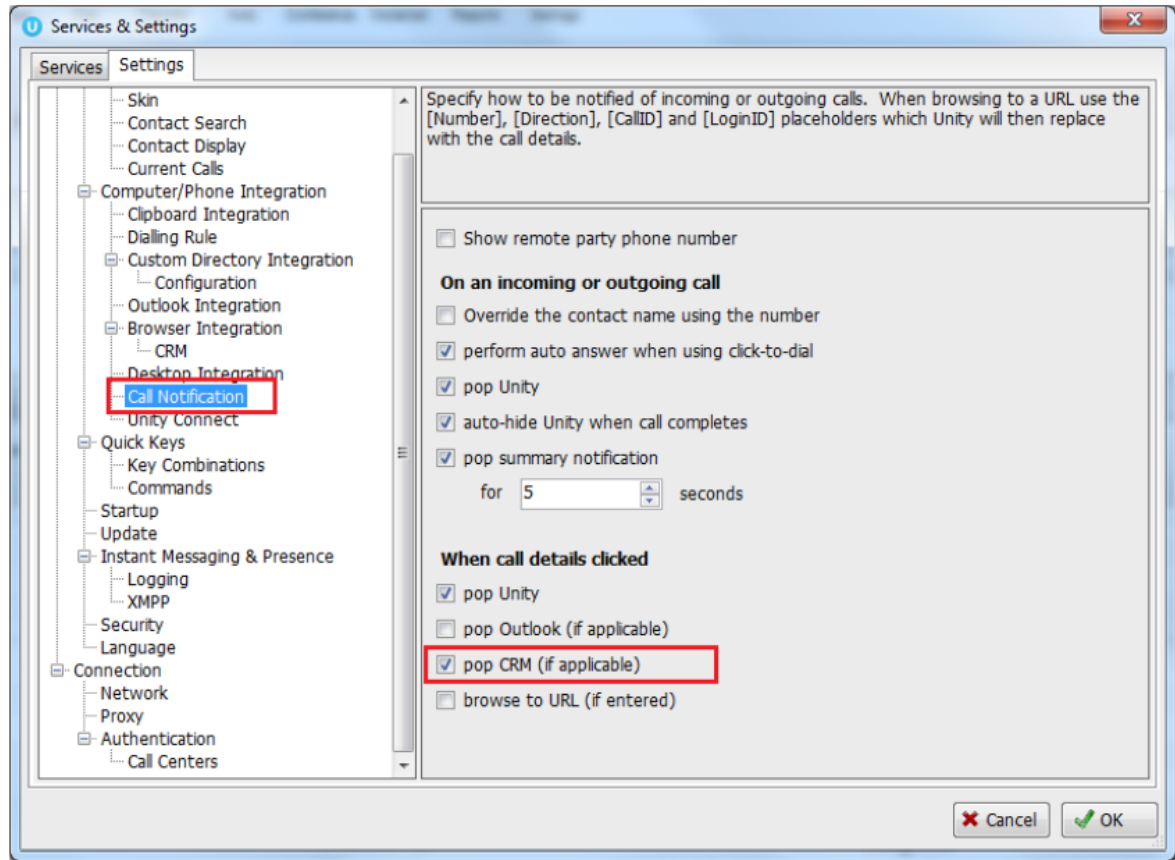
Reset column widths

☒ Show gridlines

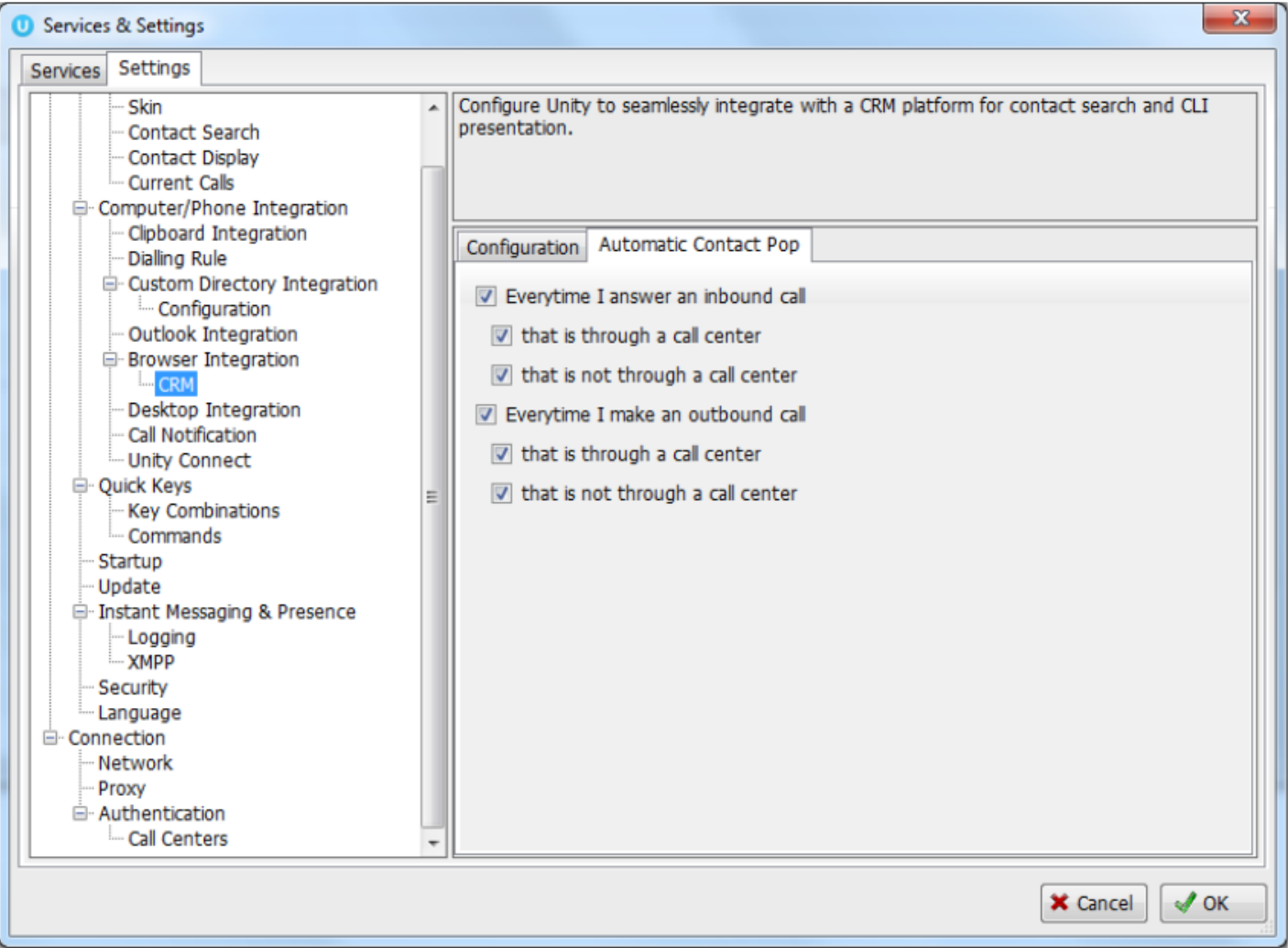
You can also click on the call details “toast” notification popup to pop the contact, as below. Again, this assumes the contact was found in the CRM platform.



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.



• 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

Satellite

NEVADA

UTAH

CALIFORNIA

ARIZONA

Los Angeles

San Diego

Las Vegas

Contacts

Deals

Notes

Events

Tasks

☐

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

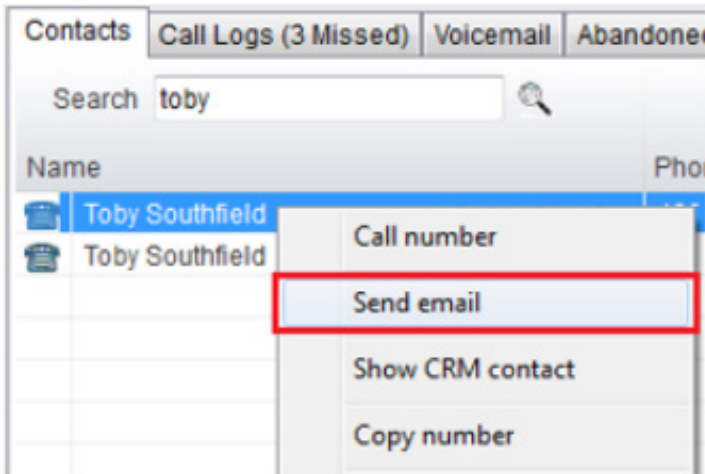
Abandoned Calls

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.

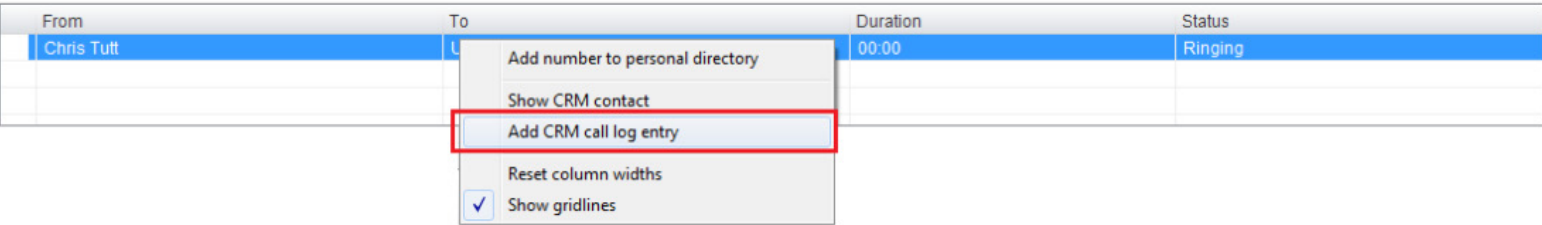


• Call Log Entry

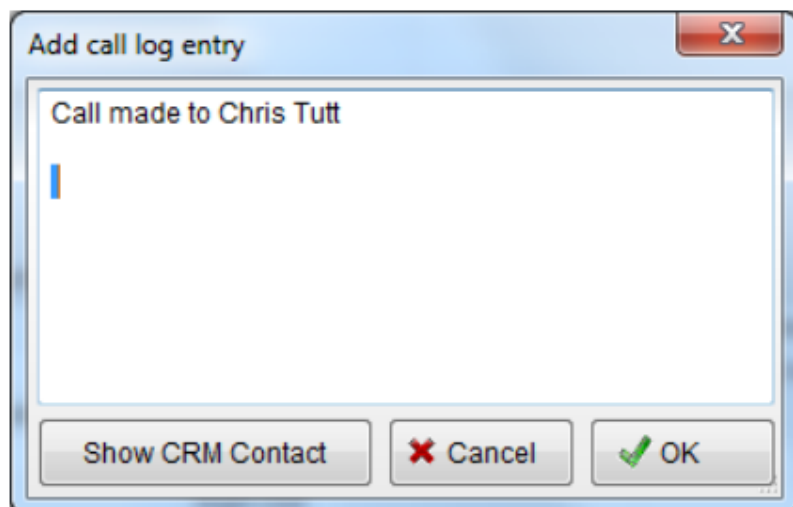
When integrated with Agile CRM, Unity can add call log entries on behalf of the user, as outlined below.

• Call Log Entry

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

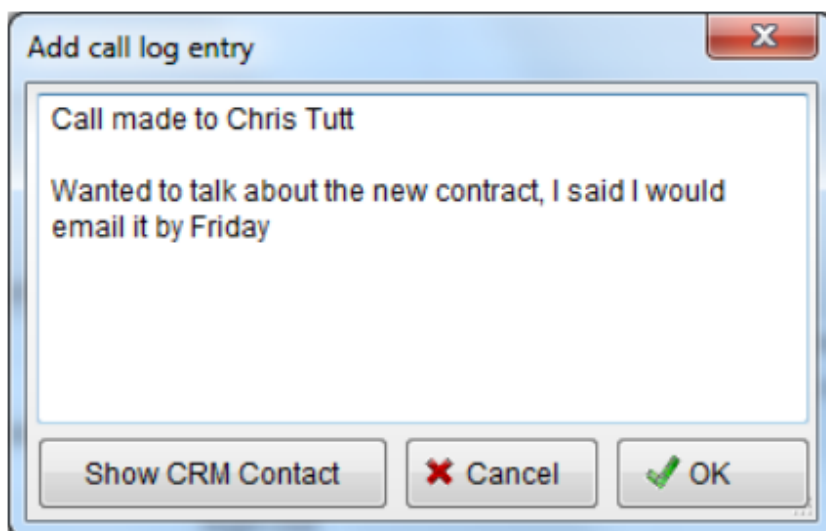


Unity will enter basic details of the call depending on if the call is inbound or outbound, as shown below. Remember this call log will be stored in Agile CRM so an outbound call in Unity is an inbound call in Agile CRM, because we have called the contact.



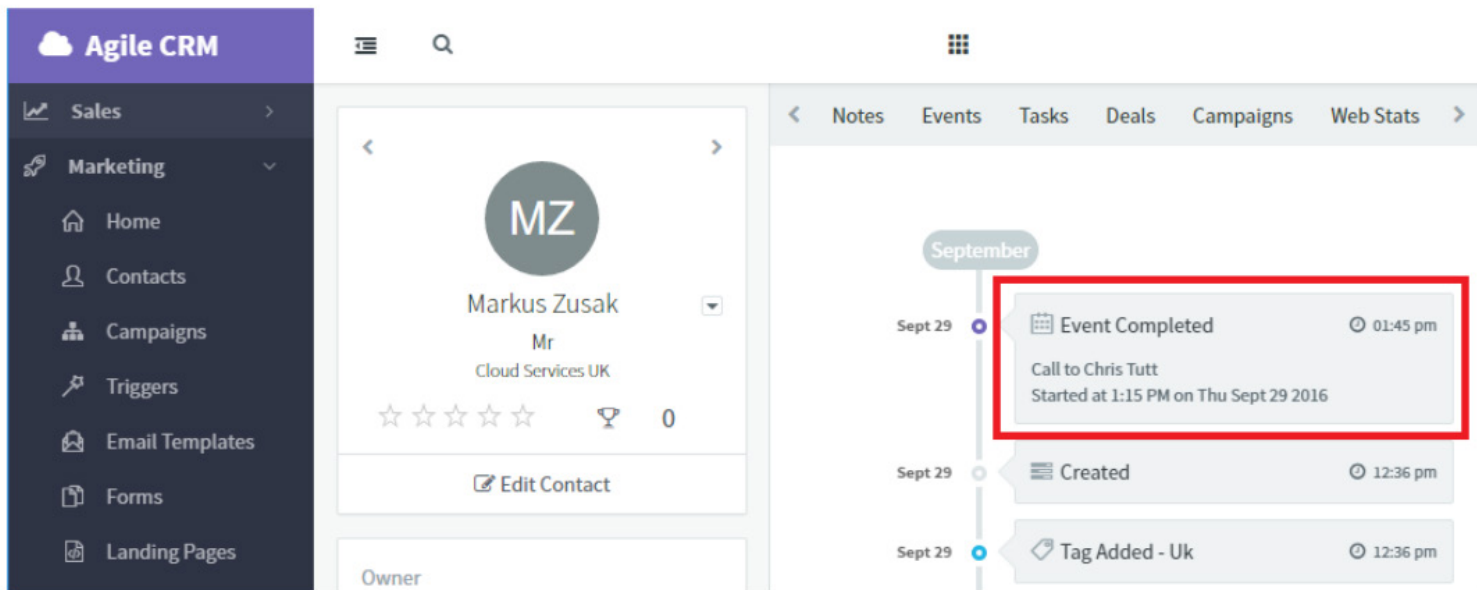
The screenshot shows a dialog box titled "Add call log entry" with a close button (X) in the top right corner. The main text area contains the text "Call made to Chris Tutt" and a blue vertical cursor. At the bottom of the dialog, there are three buttons: "Show CRM Contact", "Cancel" (with a red X icon), and "OK" (with a green checkmark icon).

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.



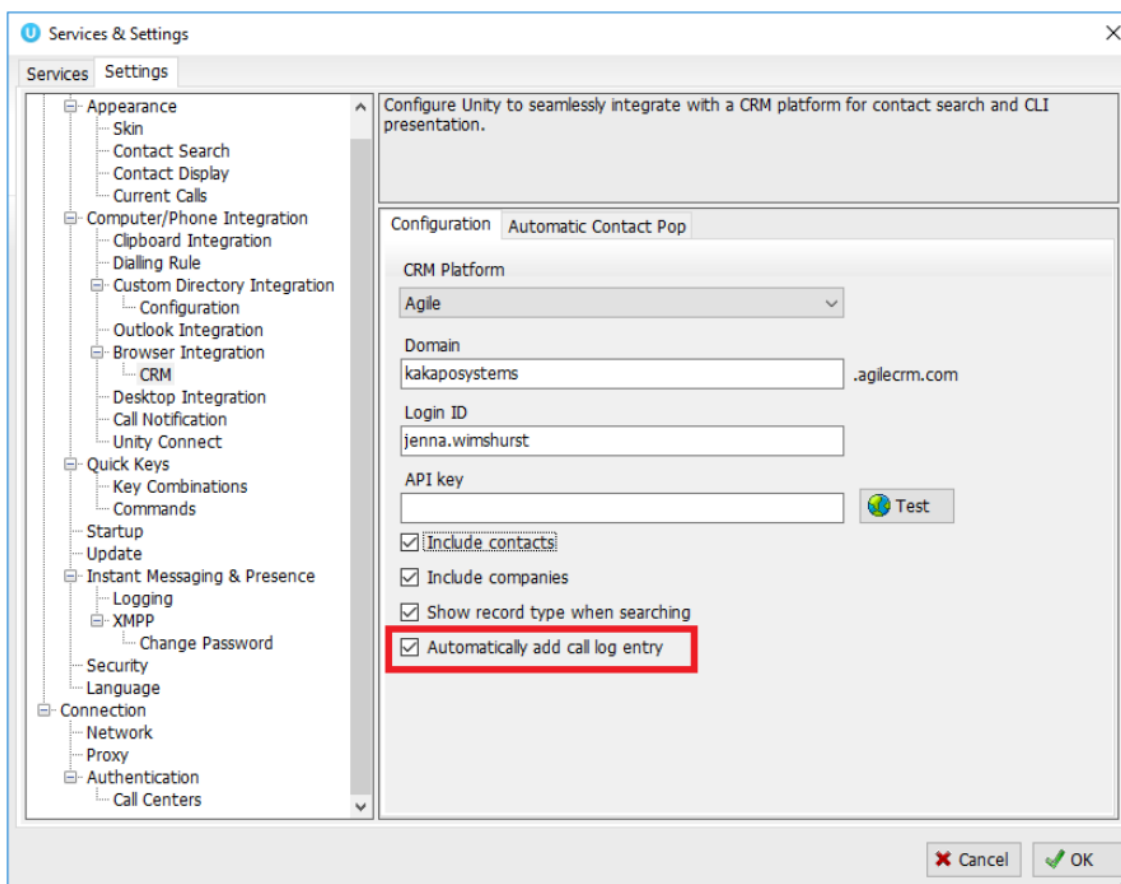
The screenshot shows the same "Add call log entry" dialog box, but the text area now contains two lines of text: "Call made to Chris Tutt" and "Wanted to talk about the new contract, I said I would email it by Friday". The buttons at the bottom ("Show CRM Contact", "Cancel", and "OK") are identical to the previous screenshot.

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



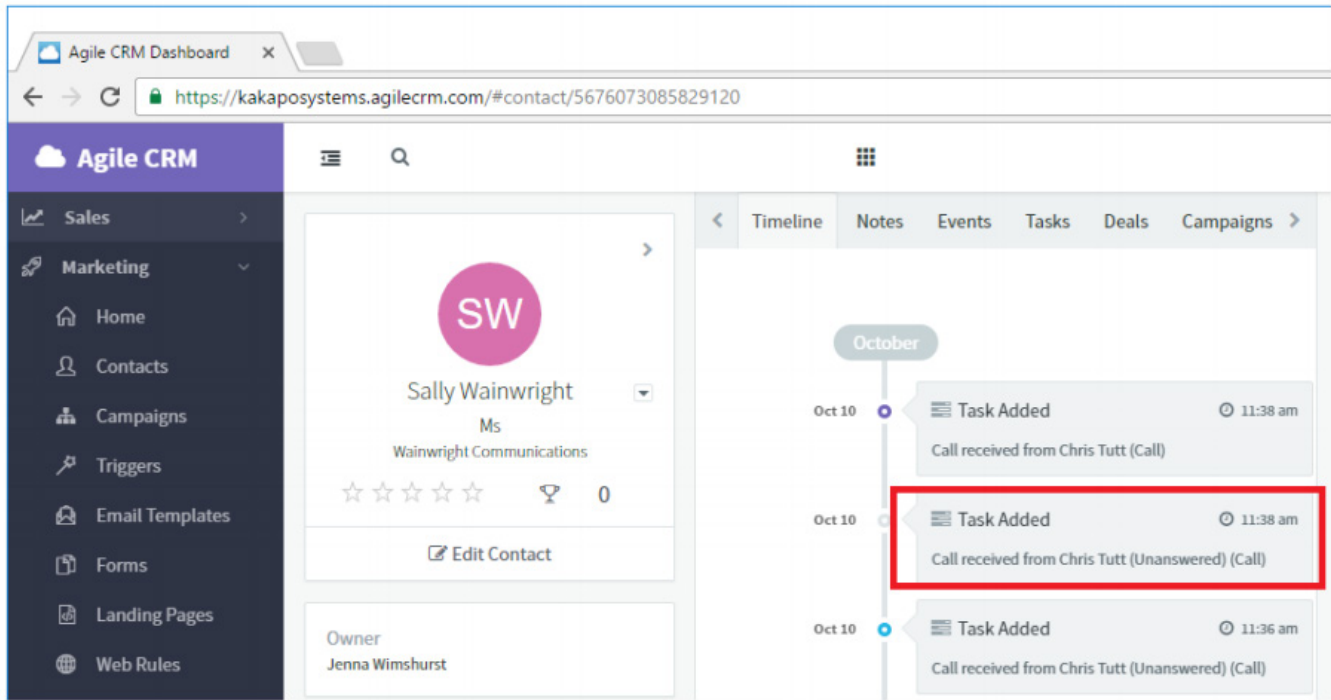
• Automatic Call Log Entry

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.

