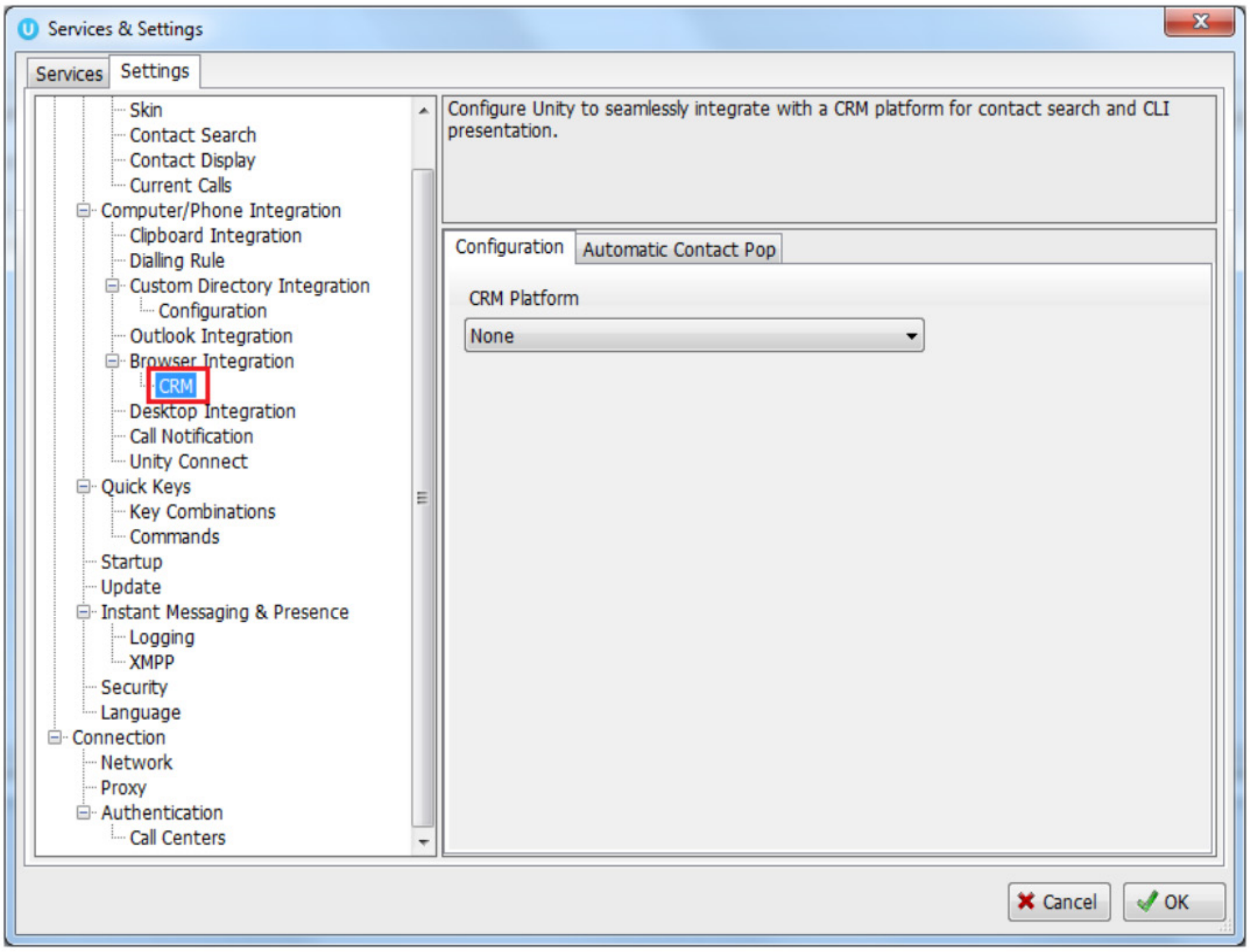
Unity: Salesforce CRM Integration

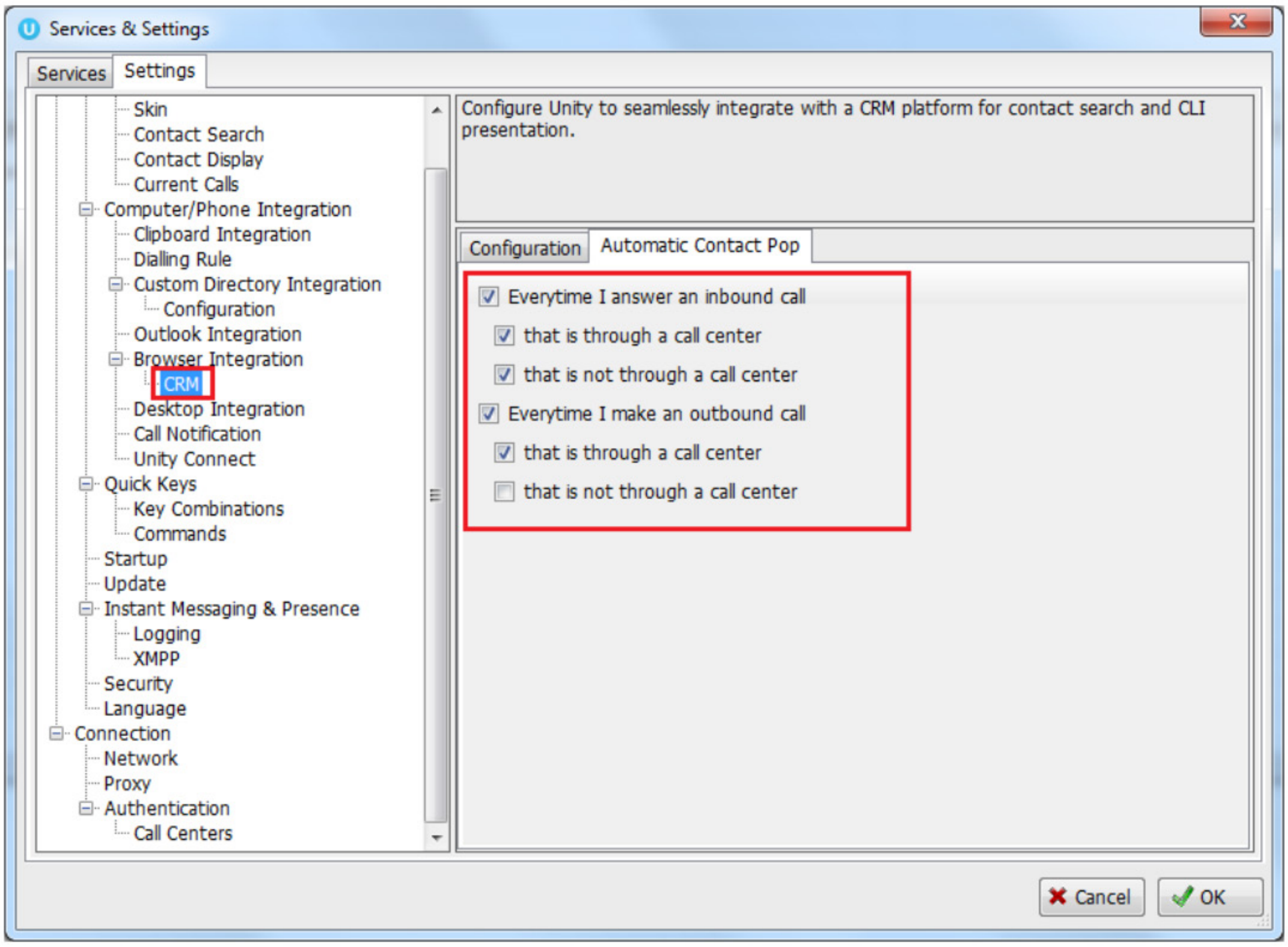
OVERVIEW

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.



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.

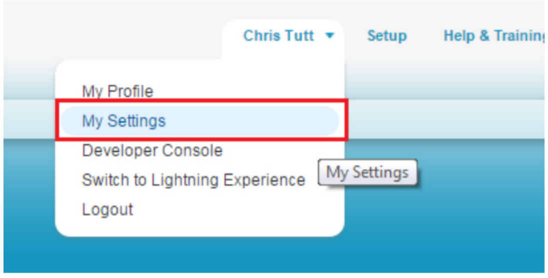


CONFIGURING SALESFORCE.COM INTEGRATION

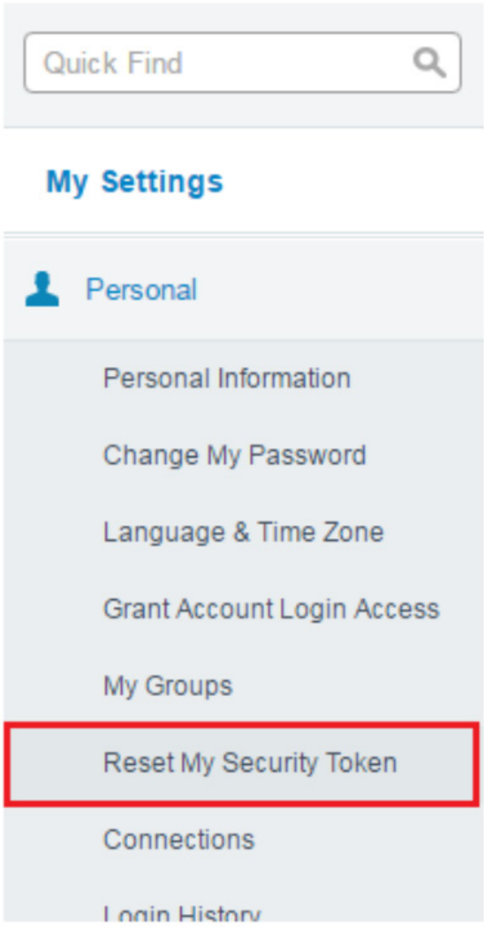
Please note that Unity is only able to consume the Salesforce.com API if the appropriate Salesforce.com license/edition is in use, please speak to Salesforce.com for more information.

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.

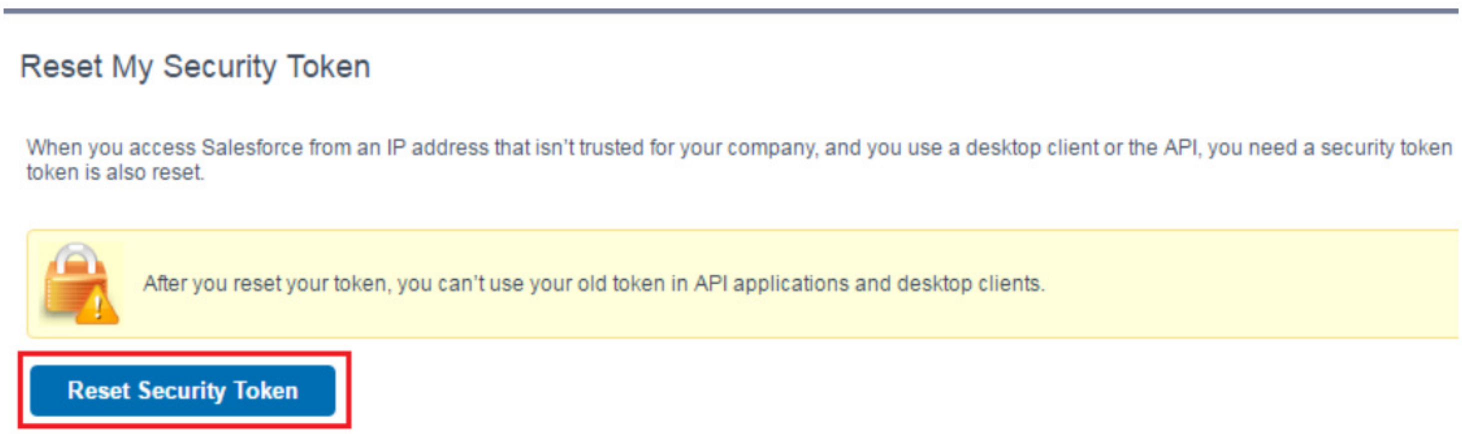
1. Log into Salesforce.com and click "My Settings" in the top-right corner.



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



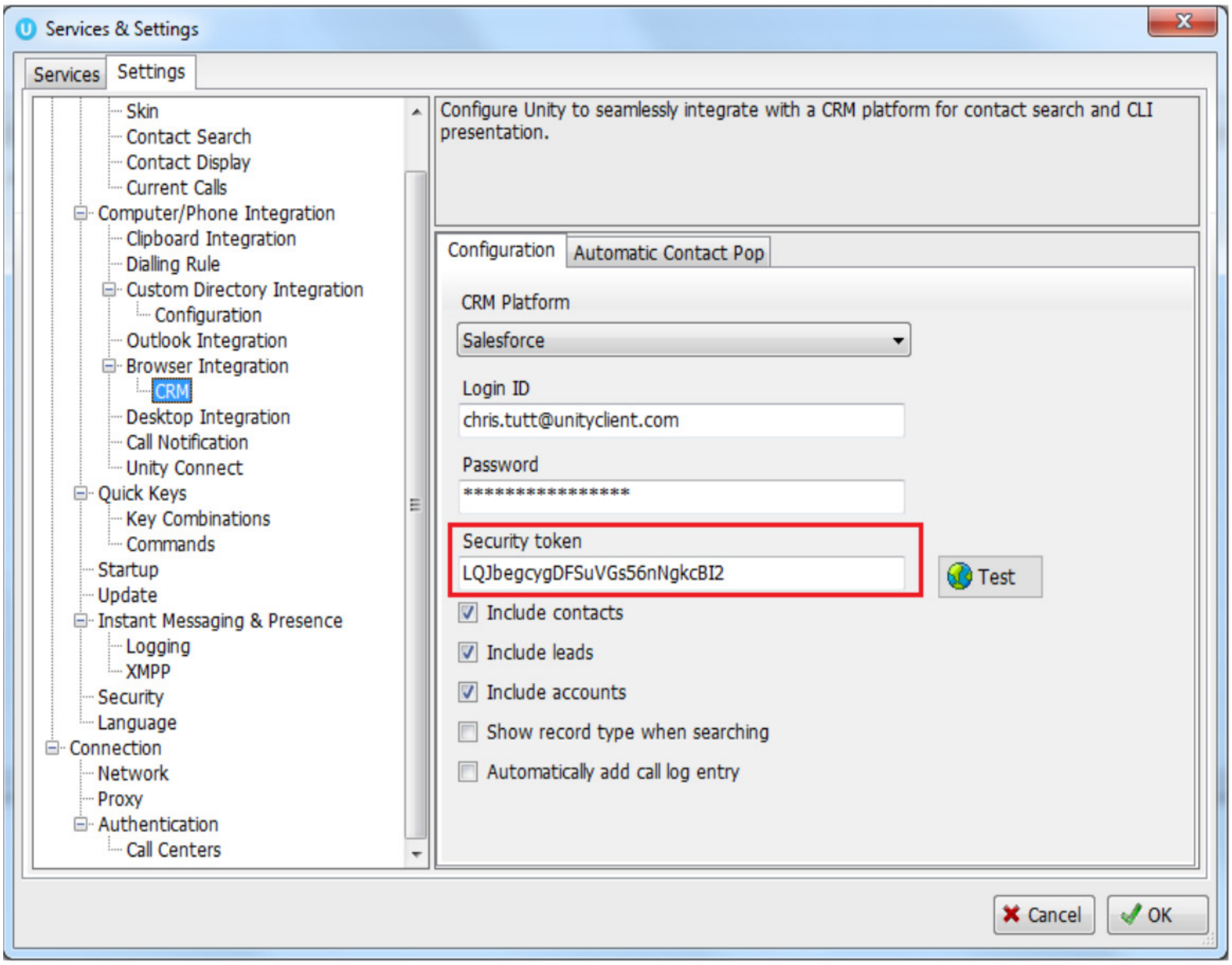
4. You will shortly receive an email with the new security token, as below

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.

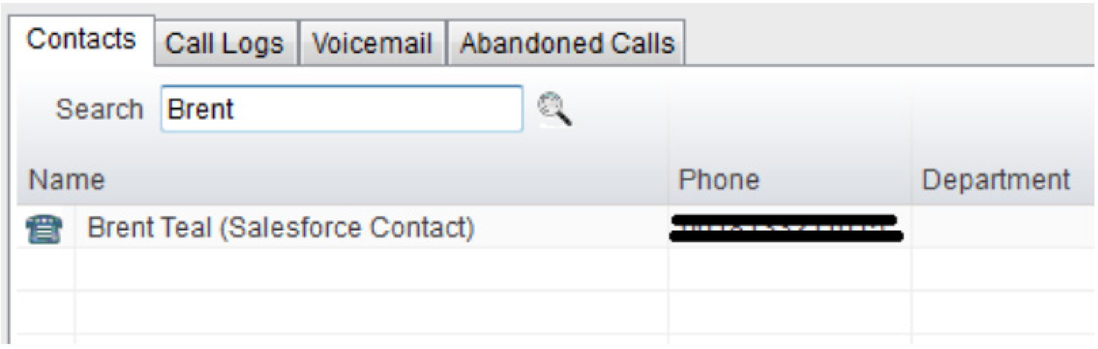
5. Go to Unity Settings and select Salesforce.com as the CRM platform. You will then be able to enter the login ID and password that you use when logging into Salesforce.com, as well as the security token from the email, please make sure you copy this directly from the email and paste it directly into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

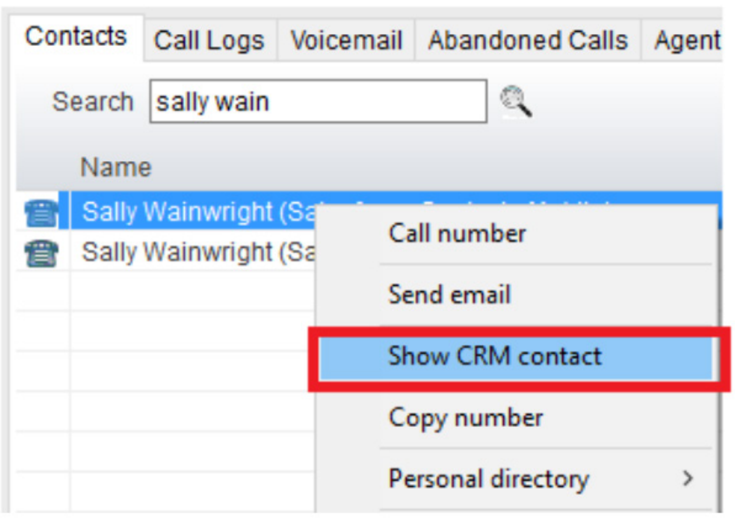
6. Click on the Automatic Contact Pop tab to configure these parameters, then click Save. You will be able to test the integration by performing a search for a contact within Unity, you should see Salesforce.com records appear in the list as well as from all other directories. If in doubt you may want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



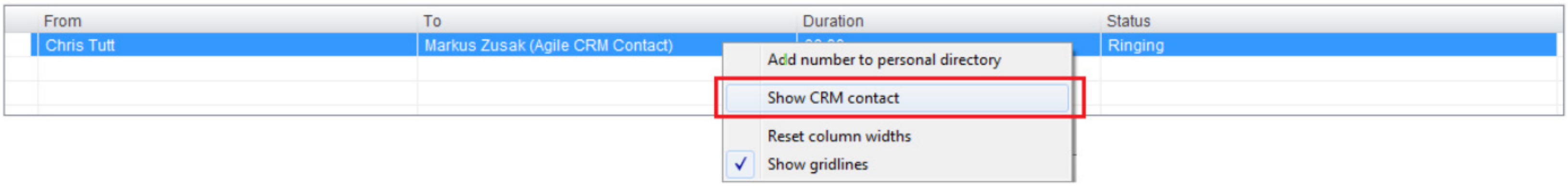
UNITY CRM FUNCTIONALITY

- Contact Pop

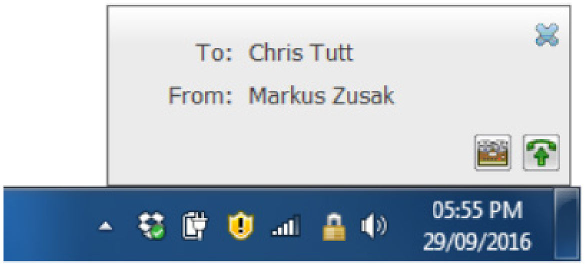
Unity will use Salesforce.com to identify inbound and outbound calls, including queued call center calls. At any time, you can search for CRM contacts from within Unity and perform click to dial to make an outbound call to the contact, or display the contact in the CRM platform (this is referred to as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



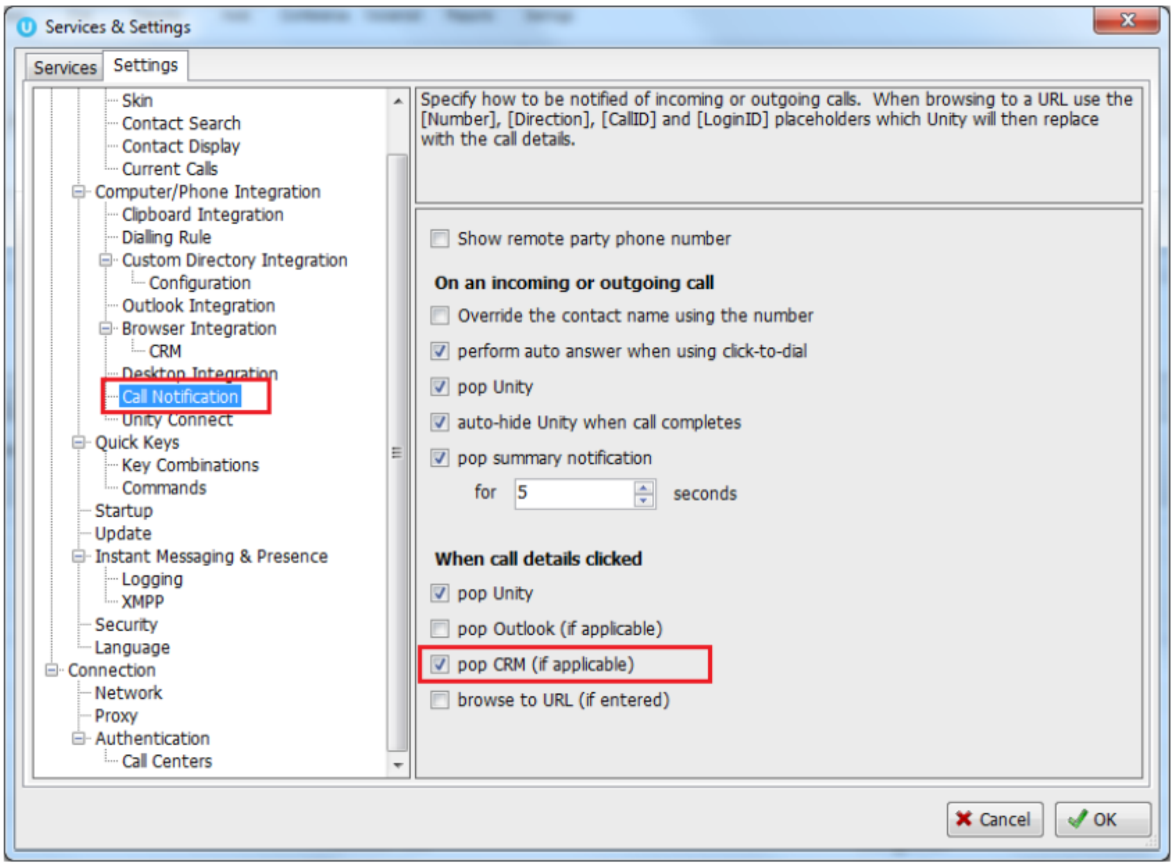
You can also right-click a call to pop the record in Salesforce.com using the default browser, as shown below. This assumes the contact was found in the CRM platform rather than another directory (for example an Outlook contacts folder).



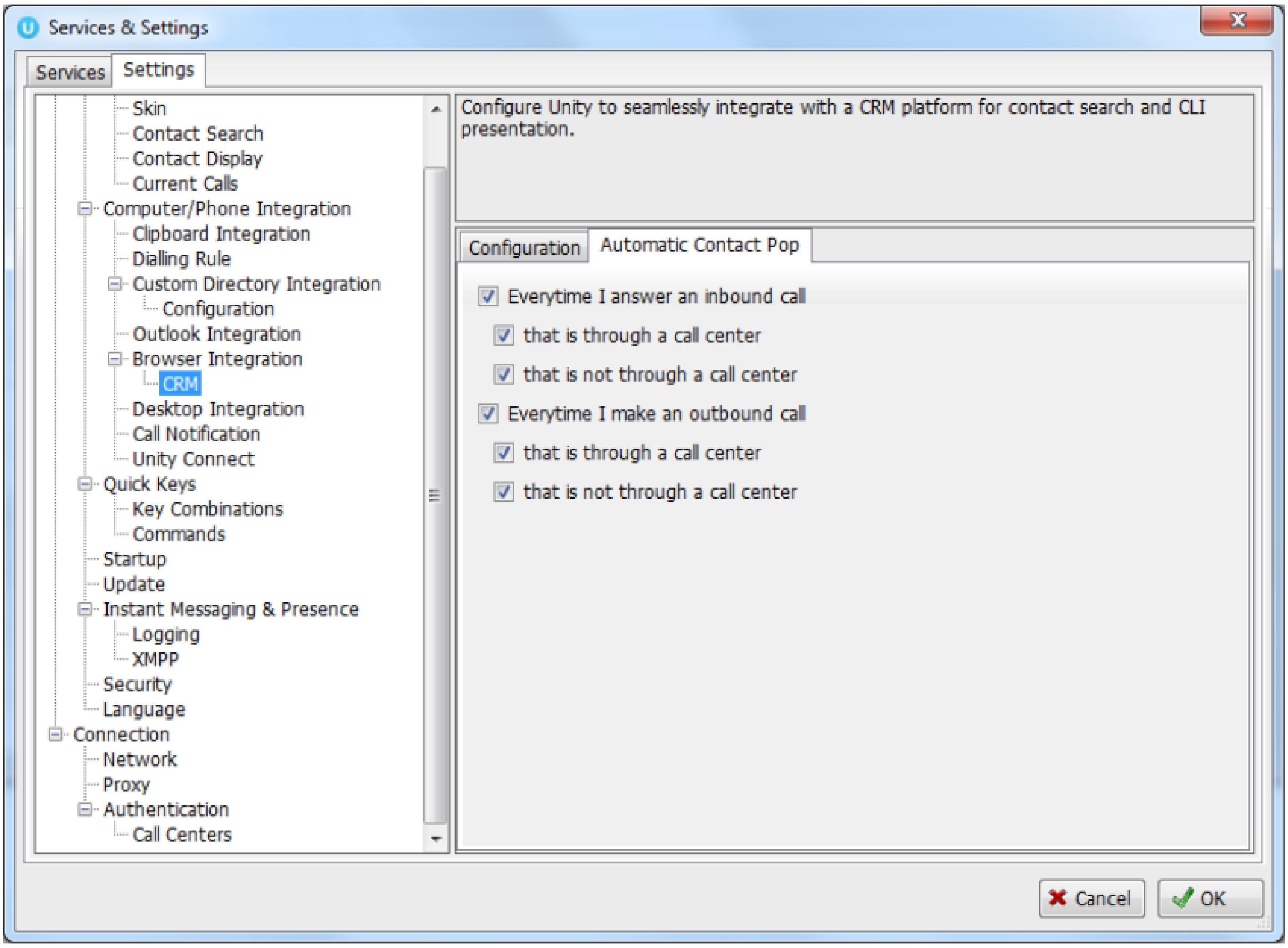
You can also click on the call details "toast" notification popup to pop the contact, as below. Again, this assumes the contact was found in the CRM platform.



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

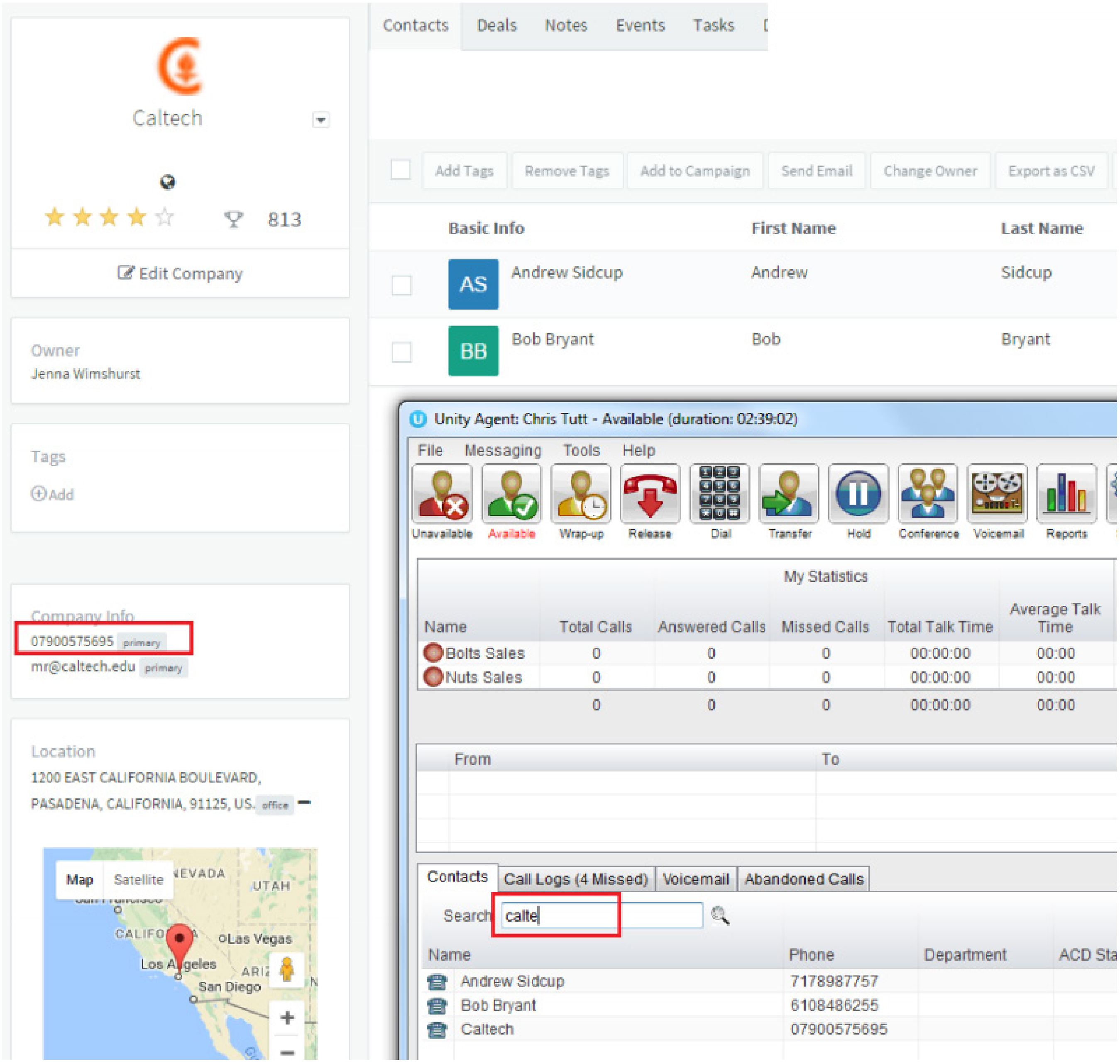


Unity can also be configured to automatically pop the CRM contact when the call isanswered, which depends on the Automatic Contact Pop tab settings as shown below.

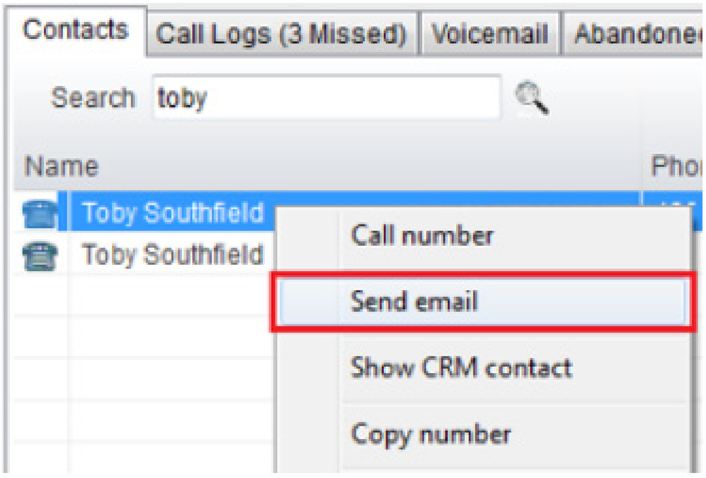


• Contact Search

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.

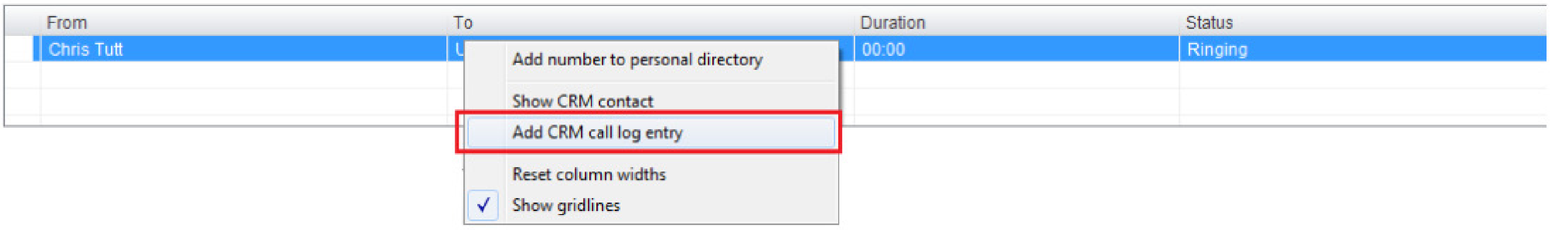


- ## Call Log Entry

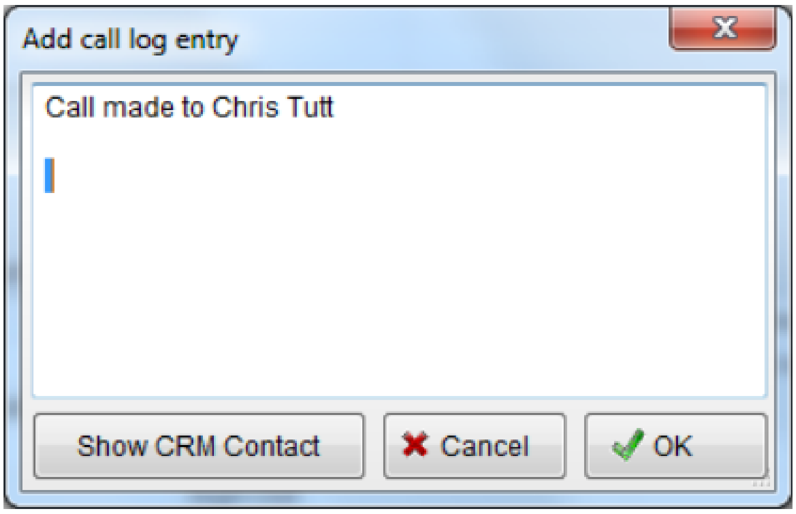
When integrated with Agile CRM, Unity can add call log entries on behalf of the user, as outlined below.

- ## Call Log Entry

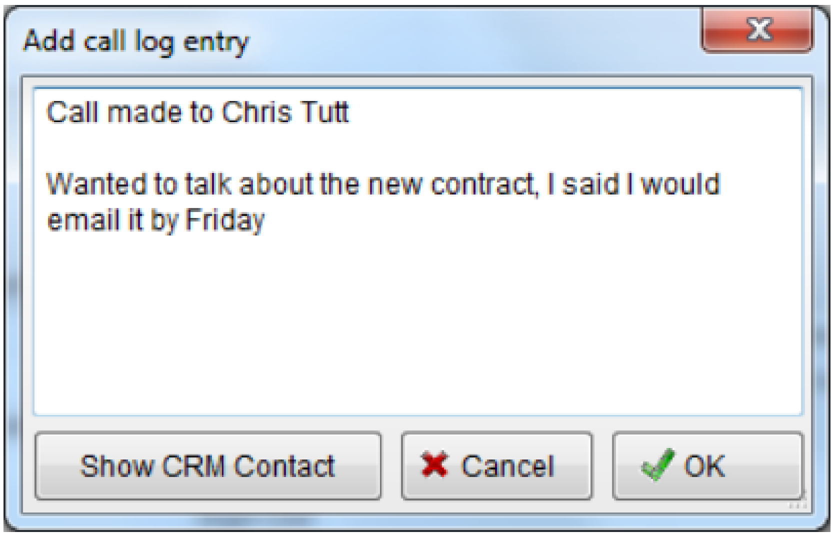
Right-click on a call and select to add a call log entry, as shown below.



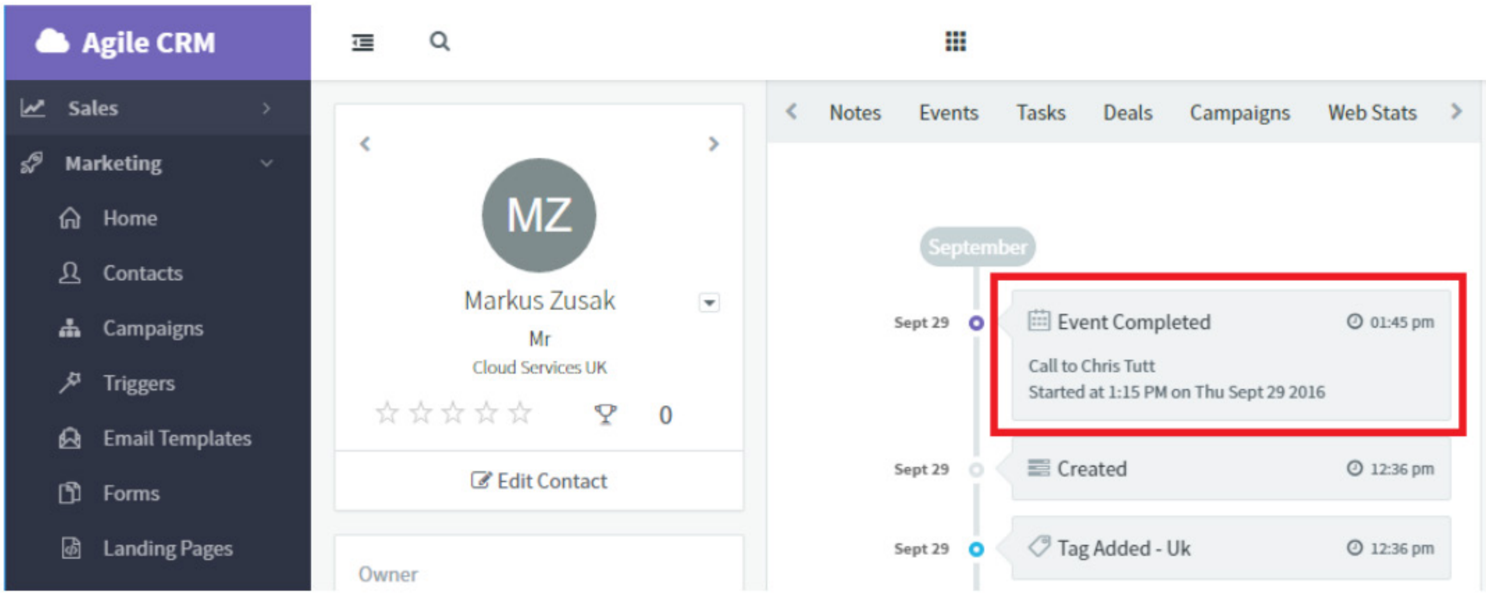
Unity will enter basic details of the call depending on if the call is inbound or outbound, as shown below. Remember this call log will be stored in Agile CRM so an outbound call in Unity is an inbound call in Agile CRM, because we have called the contact.



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.

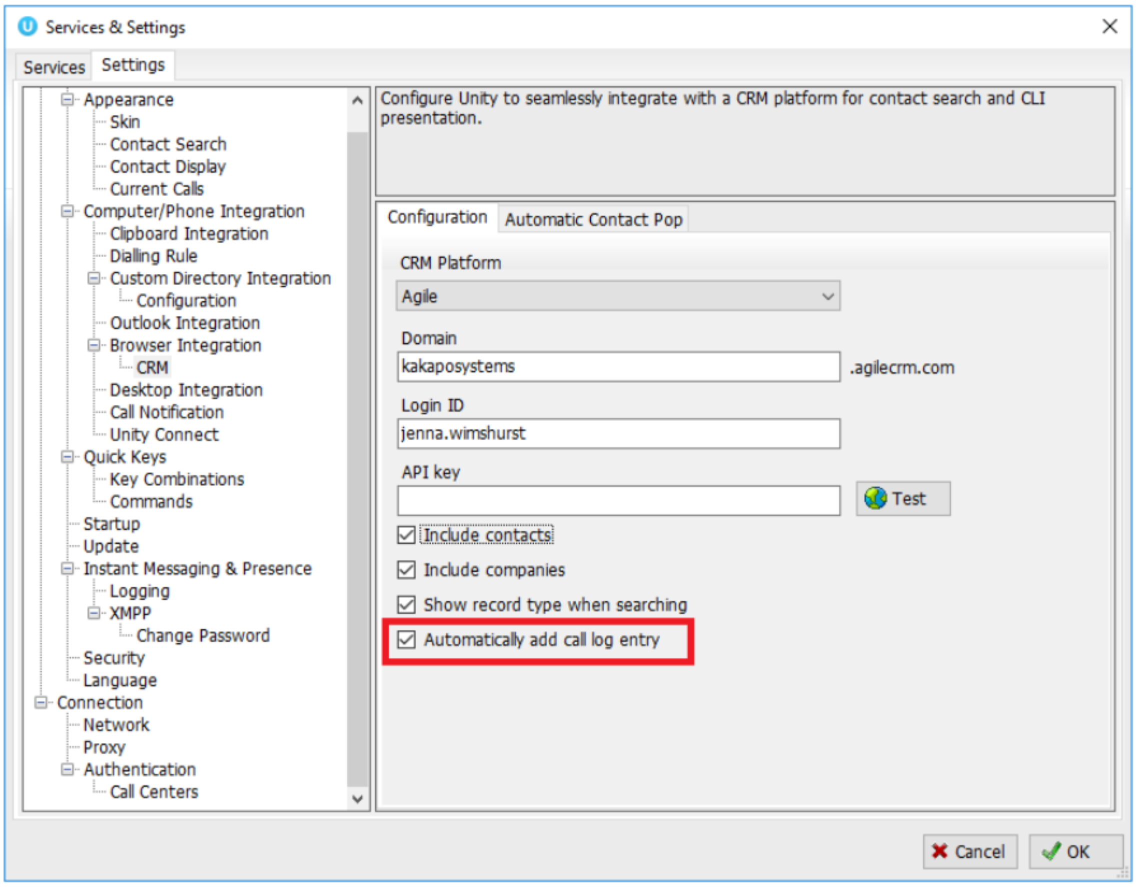


You will now see this call log entry in Agile CRM, as shown below



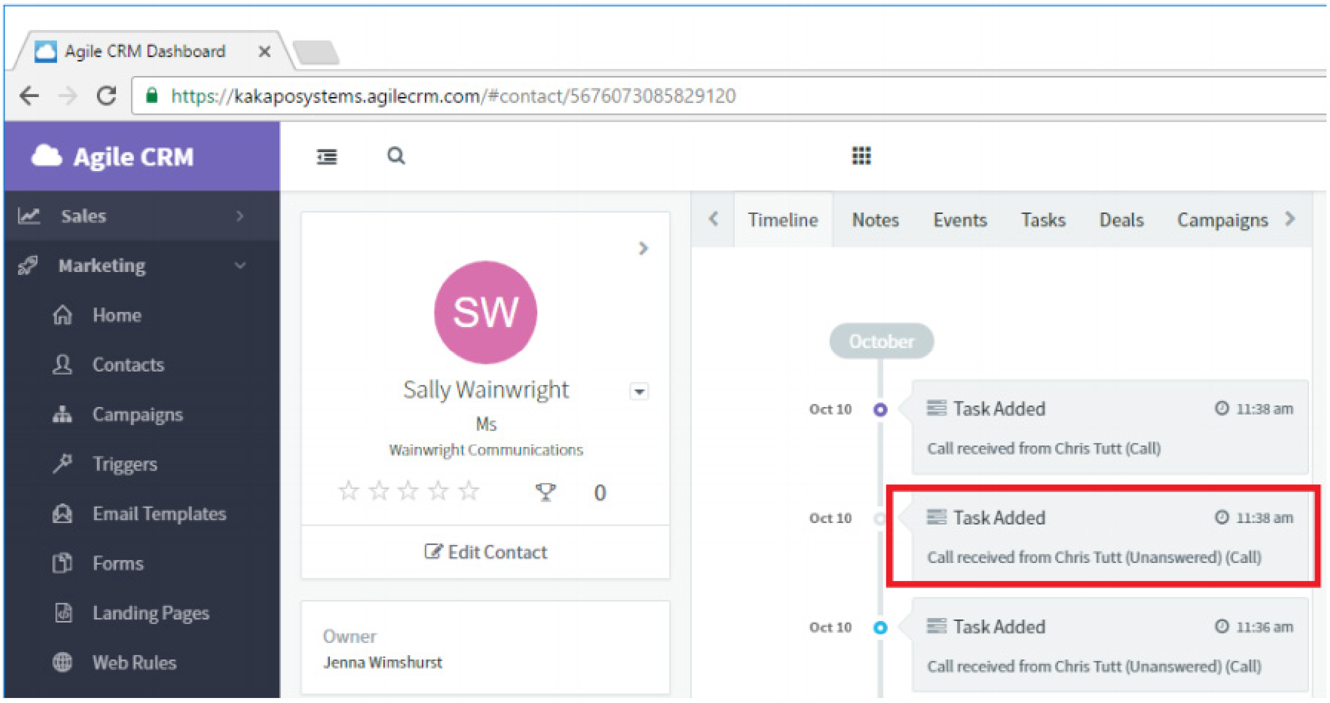
• Automatic Call Log Entry

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 isremoved 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.