

UNITY – AGILE CRM INTEGRATION



Click-to-Dial



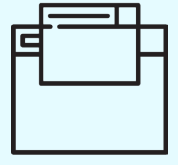
Contact Lookup



Queue Profiling



Journaling



Call Popping

Identify incoming Agile calls

Auto pop Agile contact on answer

Prioritise Agile contacts in queue

The screenshot displays the Unity CRM interface for an agent named Jenna Wimshurst. It includes a top navigation bar with icons for various functions. Below this is a 'My Statistics' table with columns for Name, Total Calls, Answered Calls, Missed Calls, Total Talk Time, Average Talk Time, Web Chats Received, Chats Answered, and Answered. A table below shows statistics for different sales teams: Bolts Sales, Kakapo Systems, and Nuts Sales. The main area shows a list of activities, including calls from 'Natalie Maines (Agile CRM Contact)' and 'Jaik George (Agile CRM Contact)'. A context menu is open over the 'Jaik George' contact, showing options like 'Answer call', 'Promote call', 'Transfer', 'Show agent activity', 'Reset column widths', 'Show gridlines', 'Call number', 'Send email', 'Show CRM contact', and 'Copy number'. A search bar is visible with the text 'george'. On the right, a call log shows a list of calls with details like 'Outgoing Call' (05:15 pm, 43s duration) and 'Incoming Call' (03:43 pm, not answered).

Search Agile within Unity

Open Agile contact

Automatic call logging

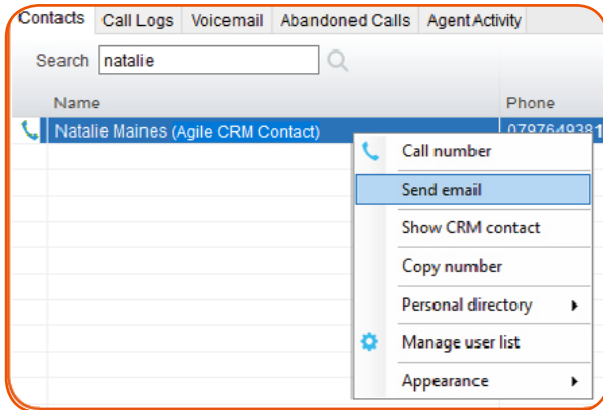
Collate Your Contacts With Unity & Agile CRM
 Unity seamlessly integrates with Agile to facilitate contact lookup and “popping” for inbound and outbound calls, searching for CRM contacts within Unity and click to dial both from within Unity and the CRM platform.

Unity CRM Connect will pop the record in Agile CRM, either automatically or when the user clicks the call notification. Outbound calls can be made from within Agile direct, or through Unity Contact Search.



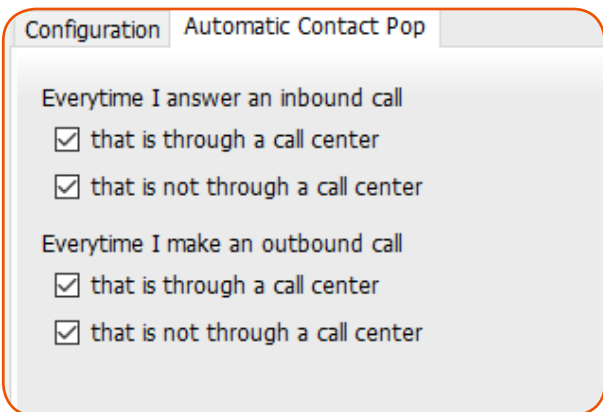
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Key Features



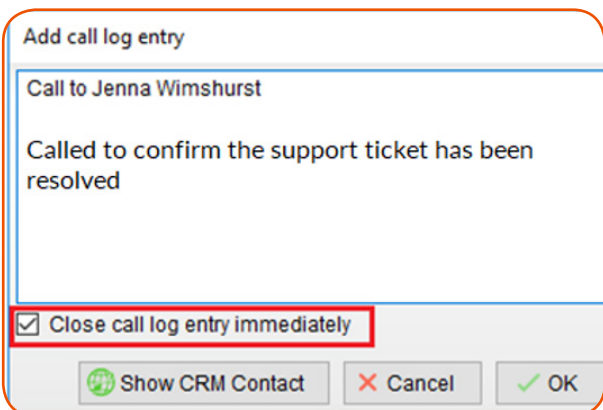
Contact Search

Perform a contact search and Unity will not only check all directories such as the group/enterprise phone list, personal directory and Outlook etc, but it will also dynamically search your Agile contacts.



Automatic Call Pop

When a CRM contact is called, the user can easily view the contact in the Agile platform. Unity can also be configured to automatically pop the CRM contact when the call is answered.



Add Call Log Entry

Easily configure Unity to automatically add a call log entry for any calls. Users can then add further notes manually, which will then be stored in Agile.