



KAKAPO

SYSTEMS

AGILE CRM INTEGRATION

Unity Application Suite | Unity completely unifies all customer contact, including calls, emails and web chats at a user level within Agile CRM

COLLATE YOUR CONTACTS WITH UNITY AND AGILE CRM

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 the CRM platform.

Unity CRM Connector 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.

AGILE CRM INTEGRATION

Auto pop Agile contact on answer

The screenshot displays the Unity CRM interface. At the top, there's a menu bar with 'File', 'Messaging', 'Tools', and 'Help'. Below it is a toolbar with various icons for calls, messaging, and settings. The main area is divided into two sections. The top section, 'My Statistics', shows a table with columns for 'Name', 'Total Calls', 'Answered Calls', 'Missed Calls', 'Total Talk Time', 'Average Talk Time', 'Web Chats Received', 'Chats Answered', 'Calls Answered', 'Total Calls', 'Calls Answered', 'Total Missed Calls', 'Calls In Queue', 'Longest Wait Time', 'Average Wait Time', 'Average Talk Time', 'Web Chats Received', 'Web Chats Missed', 'Web Chats Queued', 'Callback Received', and 'Calls Answered'. The bottom section, 'Activity', shows a table with columns for 'Activity', 'From', 'To', 'Duration', and 'Status'. A search bar is visible, and a dropdown menu is open, showing options like 'Answer call', 'Promote call', 'Transfer', 'Show agent activity', 'Reset column widths', and 'Show gridlines'. A contact list is also visible, with a search bar and a 'Show CRM contact' button.

Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Web Chats Received	Chats Answered	Calls Answered	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Web Chats Received	Web Chats Missed	Web Chats Queued	Callback Received	Calls Answered
Bolts Sales	0	0	0	00:00	00:00	0	0	0	4	0	4	1	00:11	00:00	00:00	0	0	0	0	0
Kakapo Systems	-	-	-	-	-	1	1	0	-	-	-	-	-	-	-	1	0	0	0	0
Nuts Sales	0	0	0	00:00	00:00	-	-	-	0	0	0	0	00:00	00:00	00:00	-	-	-	-	-
	0	0	0	00:00:00	00:00	1	1	0	4	0	4	1	00:11	00:00	00:00	1	0	0	0	0

Activity	From	To	Duration	Status
Call	Natalie Maines (Agile CRM Contact)	Kakapo Systems	08:39	Reserved
Call	Jaik George (Agile CRM Contact)	Bolts Sales	00:11	Queued at position 1

Search: george

Contacts: Activity Logs: Abandoned Calls: Voicemail

Name: George Harrison, Phone: 02033456789

George Orwell (Agile CRM Contact), Phone: 02033456789

George Orwell, Jaik George, Shan George

Call number, Send email, Show CRM contact, Copy number

Search Agile within Unity

Open Agile contact

Prioritize Agile contacts in queue

Identify incoming Agile calls

The screenshot displays the Agile CRM interface. On the left, there's a sidebar with a search bar and a list of contacts. The main area shows a contact profile for 'Sri' with a star rating and a 'Call number' button. On the right, there's a 'Call History' section with a list of calls. A red box highlights the 'Call History' section, showing a list of calls with columns for 'Date', 'Time', 'Call Type', 'Duration', and 'Status'. The calls listed are 'Outgoing Call' (05:15 pm, 43s), 'Incoming Call' (03:43 pm, Not answered - 0s), and 'Incoming Call - No Answer' (03:43 pm).

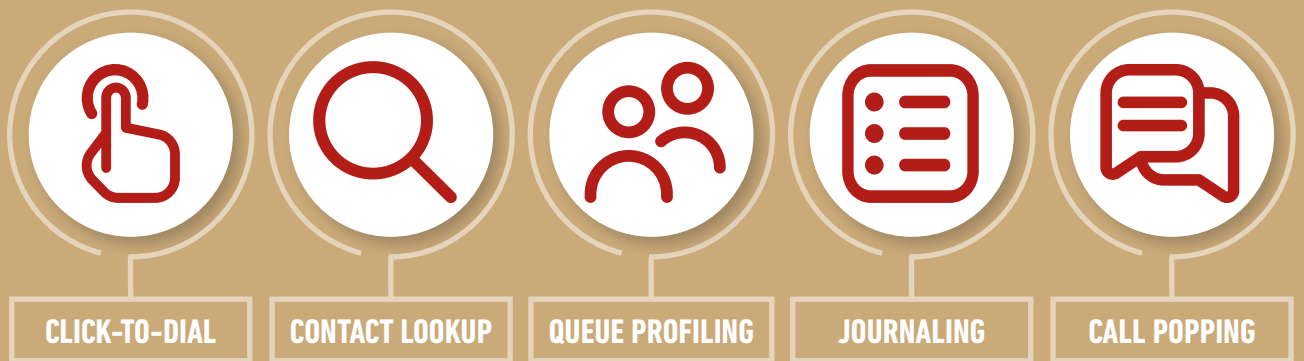
Search: Sri

Call number

Call History

Date	Time	Call Type	Duration	Status
March 21	05:15 pm	Outgoing Call	43s	
March 21	03:43 pm	Incoming Call	Not answered - 0s	
March 21	03:43 pm	Incoming Call - No Answer		

Automatic call logging



CONTACT SEARCH

Perform a contact search and Unity will not only check all directories, but it will also dynamically search your Agile CRM contacts.

AUTOMATIC CALL POP

The user can easily view the contact in the Agile CRM and Unity can also be configured to automatically pop the CRM on answer.

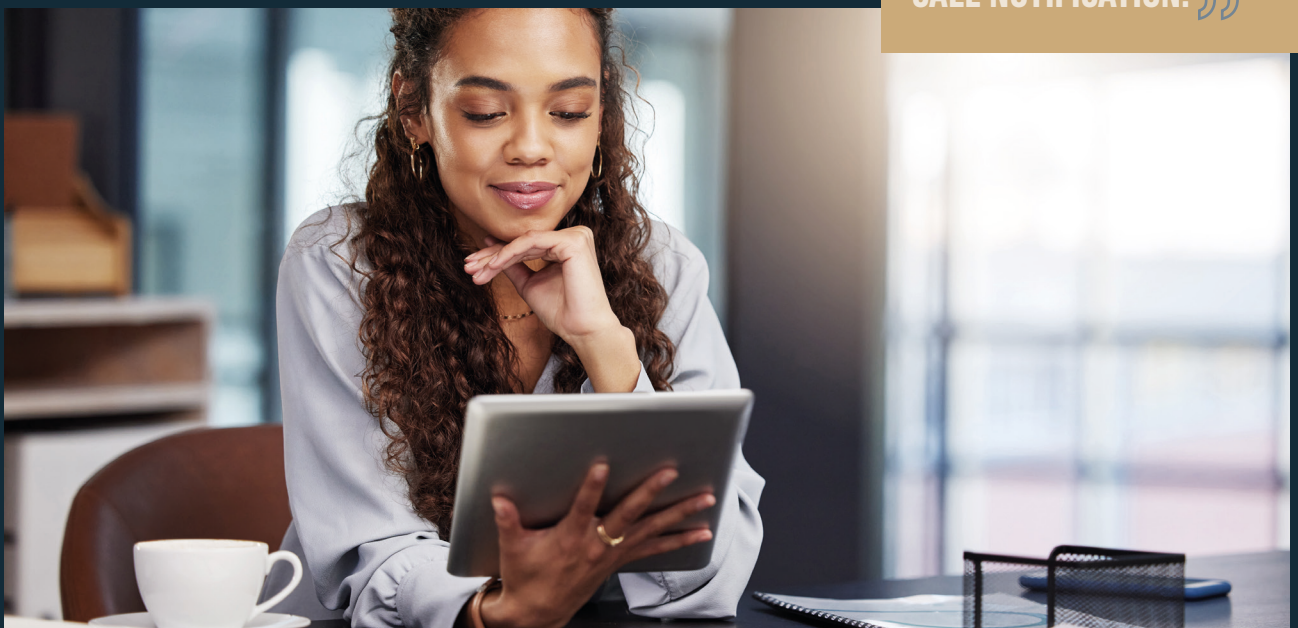
ADD CALL LOG ENTRY

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 CRM.

PRESENCE

Set your presence to alert colleagues to your current availability. Predefine routing, such as diverting calls to your mobile if you are out of the office.

“UNITY CRM CONNECTOR WILL POP THE RECORD IN AGILE CRM, EITHER AUTOMATICALLY OR WHEN THE USER CLICKS THE CALL NOTIFICATION.”



Do it once and get it right first time. Unity's Agile CRM integration completely unifies all customer contact, including calls, emails, chats and tweets at a user level within Agile CRM.

All calls are journaled within Agile CRM, including the direction of the call, with the option to edit the task log and leave the call log open or closed. Agile CRM can be polled directly from Unity Search, combining all Outlook, group, personal and Agile CRM contact numbers in one place.

PRIORITIZING QUEUED CALLS

- Prioritize contacts in queue
- Transfer Agile CRM users to VIP queue
- Intelligently manage important calls



CLICK-TO-DIAL

- Click-to-dial from within Agile CRM
- Turn web chats into calls instantly
- Flexibility for ad-hoc dialling



MULTI-CHANNEL INTEGRATION

- Web chat and email profiling
- View previous CC conversations
- Screen popping on all media



AUTOMATIC CALL JOURNALING

- Log all calls, web chats and emails
- Manually edit automatic log entries
- View full transcripts in Agile CRM





ABOUT KAKAPO SYSTEMS

At Kakapo Systems, we are software solutions providers developing apps that enhance call and contact center offerings for the Cisco® BroadSoft® platform.

Our solutions are built for small to medium businesses, with an ethos that puts genuine human connection and intuitive, feature-rich, yet accessible applications at the forefront of our design decisions.

We are an international company, with offices in London and India, supporting clients all over the world.

NEXT STEPS

To request a free trial or demo of **Agile CRM Integration**:



Visit www.kakaposystems.com



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FIND US ON





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