

# UNITY – SALESFORCE INTEGRATION



Click-to-Dial



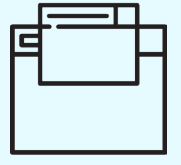
Contact Lookup



Queue Profiling



Journaling



Call Popping

Identify incoming Salesforce calls

Auto pop Salesforce contact on answer

Prioritise Salesforce leads in queue

The screenshot displays the Unity Agent interface for user Jenna Wimhurst. It includes a top navigation bar, a 'My Statistics' table, a call log, and a Salesforce contact detail view for Natalie Maines. The call log shows an incoming call from Jaik George (Salesforce Lead) with a context menu open showing options like 'Show CRM contact'. The Salesforce contact detail view shows contact information and a list of open activities.

Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Web Chats Received	Chats Answered	Missed
Bolts Sales	0	0	0	00:00	00:00	0	0	0
Kakapo Systems	-	-	-	-	-	1	1	0
Nuts Sales	0	0	0	00:00	00:00	-	-	-
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>00:00:00</b>	<b>00:00</b>	<b>1</b>	<b>1</b>	<b>0</b>

Total Calls	Answered	Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Web Chats Received	Web Chats Missed	Web Chats Queued	Callbacks Received	Missed
0	4	1	1	00:11	00:00	00:00	0	0	0	0	0

Search Salesforce within Unity

Open Salesforce contact

Automatic call logging

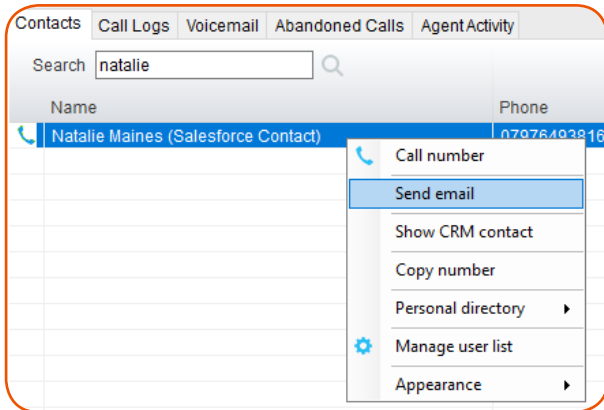
Collate Your Contacts With Unity & Salesforce  
Unity seamlessly integrates with Salesforce to facilitate contact lookup and “popping” for inbound and outbound calls, searching for CRM contacts within Unity and click to dial both from within Unity and the CRM platform.

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



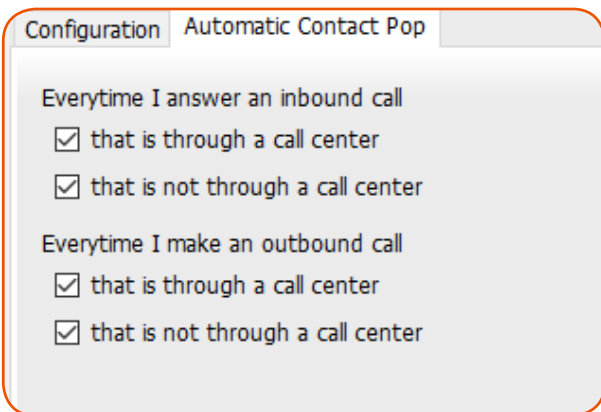
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## Key Features



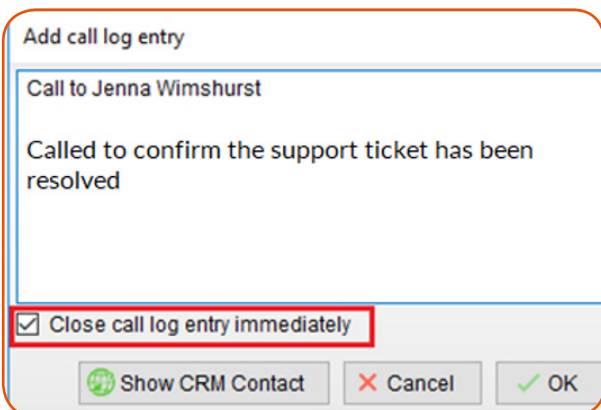
### Contact Search

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 Salesforce contacts.



### Automatic Call Pop

When a CRM contact is called, the user can easily view the contact in the Salesforce 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 Salesforce.