

The background of the entire page is a photograph of a modern office interior. In the foreground, a man with a beard and a woman are smiling and looking at a tablet held by the man. The man is wearing a dark blazer over a yellow shirt, and the woman is wearing a light-colored knit top. In the background, there are glass partitions, office desks, and other people working. A large, stylized red 'K' graphic is overlaid on the right side of the image.

KAKAPO

SYSTEMS

# SALESFORCE INTEGRATION

Unity completely unifies all customer contact, including calls, emails and web chats at a user level within Salesforce

# COLLATE YOUR CONTACTS WITH UNITY AND 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 Connector 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.

## SALESFORCE INTEGRATION

Auto pop Salesforce 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 call management. The main area is divided into two sections. The top section, 'My Statistics', shows a table of call metrics for different sales teams. The bottom section, 'Activity', shows a list of recent calls. 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 red box highlights the 'Show CRM contact' option in the dropdown menu.

Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Web Chats Received	Chats Answered	Chats Missed	Total Calls	Answered Calls	Total 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	Chats 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), Mobile: 02720774542

George Orwell, Jaik George, Shan George

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

Answer call, Promote call, Transfer, Show agent activity, Reset column widths, Show gridlines

My status: available in office

Search Salesforce within Unity

Open Salesforce contact

Prioritize Salesforce leads in queue

Identify incoming Salesforce calls

Automatic call logging

The screenshot displays the Salesforce interface. At the top, there's a navigation bar with 'Home', 'Contacts', 'Accounts', 'Leads', 'Opportunities', 'Reports', 'Dashboards', 'Chatter', 'Files', 'Products', and 'Forecasts'. The main area shows the 'Contact Detail' for 'Natalie Maines'. Below this, there's a table of 'Open Activities'.

Action	Subject	Related To	Task	Due Date	Status	Priority	Assigned To
Edit   Cts	Call	Kakapo Systems	✓	28/03/2018	In Progress	Normal	Jenna Wimsurst
Edit   Cts	Webchat	Kakapo Systems	✓	25/04/2018	In Progress	Normal	Chris Tutt
Edit   Cts	Call	Kakapo Systems	✓	12/06/2018	In Progress	Normal	Steve Tutt
Edit   Cts	Webchat	Kakapo Systems	✓	17/09/2018	In Progress	Normal	Steve Tutt
Edit   Cts	Call	Kakapo Systems	✓	04/10/2018	In Progress	Normal	Jenna Wimsurst





### CONTACT SEARCH

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

### AUTOMATIC CALL POP

The user can easily view the contact in the Salesforce 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 Salesforce.

### UNITY MOBILE INTEGRATION

Extend the CRM functionality to your mobile device with Unity Mobile, including contact lookup, call log entries and using the device's native apps to send SMS and Emails to CRM contacts.

“UNITY'S SALESFORCE INTEGRATION COMPLETELY UNIFIES ALL CUSTOMER CONTACT, INCLUDING CALLS, EMAILS AND CHATS AT A USER LEVEL WITHIN SALESFORCE.”



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

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

#### **PRIORITIZING QUEUED CALLS**

- Prioritize contacts and leads
- Transfer Salesforce users to VIP queue
- Intelligently manage important calls



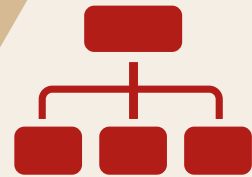
#### **CLICK-TO-DIAL**

- Click-to-dial from within Salesforce\*
- 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 Salesforce



\*Salesforce Classic only





## 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 **Salesforce Integration**:



**Visit** [www.kakaposystems.com](http://www.kakaposystems.com)



**Contact** [tellmemore@kakaposystems.com](mailto:tellmemore@kakaposystems.com)

---

FIND US ON





© Kakapo Systems 2023

T +44 (0)207 084 6845

E [tellmemore@kakaposystems.com](mailto:tellmemore@kakaposystems.com)

W [www.kakaposystems.com](http://www.kakaposystems.com)

International House | 36-38 Cornhill | London | EC3V 3NG

FIND US ON  