

UNITY – ZENDESK INTEGRATION



Click-to-Dial



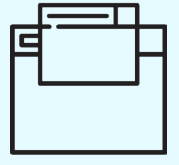
Contact Lookup



Queue Profiling



Journaling



Call Popping

Identify incoming Zendesk calls

Auto pop Zendesk users on answer

Prioritise Zendesk users in queue

The screenshot displays the Unity Agent interface. At the top, there's a header for 'Unity Agent: Jenna Wimshurst' with menu options like File, Messaging, Tools, and Help. Below this is a toolbar with various icons for call management. A 'My Statistics' table is visible, showing metrics for different departments like Bolls Sales, Kakapo Systems, and Nuts Sales. A call log table shows activity with columns for Name, From, and To. A contact list is open, showing search results for 'george'. A call details panel is active, showing information for 'Andrew Doe' from 'Johnson LLC', including role, access, and a list of requested tickets.

Search Zendesk within Unity

Open Zendesk user

Automatic call logging

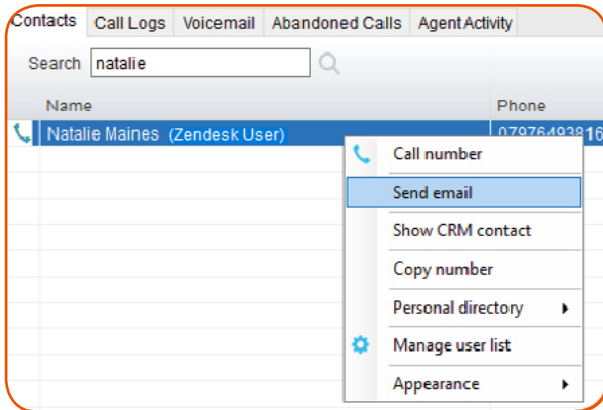
Collate Your Contacts With Unity & Zendesk
Unity seamlessly integrates with Zendesk to facilitate contact lookup and “popping” for inbound and outbound calls, searching for CRM contacts within Unity and click to dial both from within Unity and the CRM platform.

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



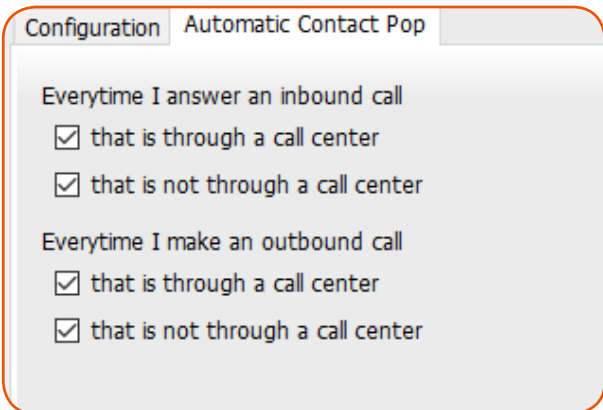
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Key Features



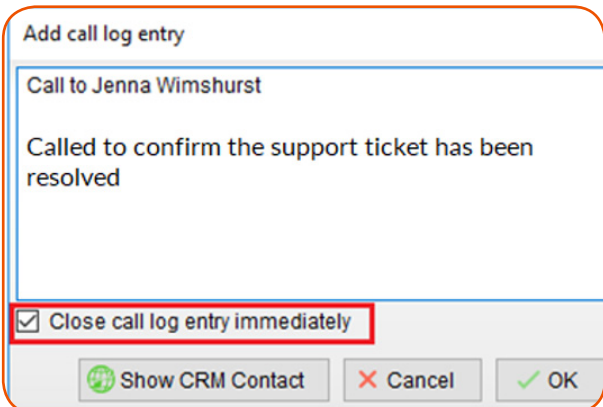
Contact Search

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 Zendesk contacts.



Automatic Call Pop

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