KAKAPO
SYSTEMS

SUGAR CRM INTEGRATION

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

COLLATE YOUR CONTACTS WITH UNITY AND SUGAR CRM

> PERFORM A CONTACT SEARCH AND UNITY WILL NOT ONLY CHECK ALL DIRECTORIES, BUT IT WILL ALSO DYNAMICALLY SEARCH YOUR SUGAR CONTACTS.

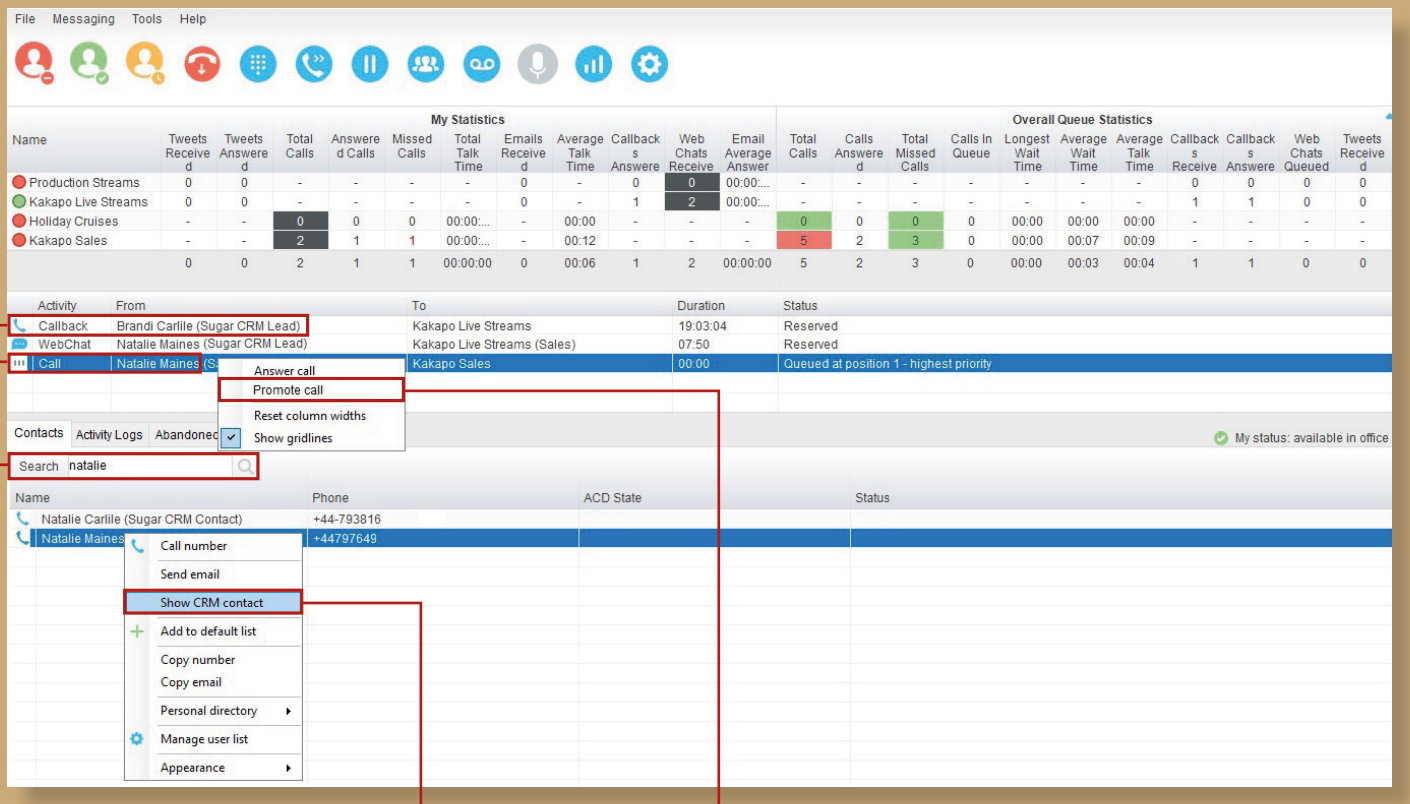
Unity seamlessly integrates with Sugar to facilitate contact lookup and 'popping' for inbound and outbound calls, searching for CRM contacts within Unity and click to dial both from within Unity and the CRM platform.

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

SUGAR CRM INTEGRATION

Identify incoming Sugar calls

Auto pop Sugar contact on answer



Search Sugar within Unity

Open Sugar contact

Prioritize Sugar leads in queue

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CLICK-TO-DIAL

CONTACT LOOKUP

QUEUE PROFILING

JOURNALING

CALL POPPING

> UNITY'S SUGAR INTEGRATION COMPLETELY UNIFIES ALL CUSTOMER CONTACT, INCLUDING CALLS, EMAILS, CHATS AND TWEETS AT A USER LEVEL WITHIN SUGAR.

CONTACT SEARCH

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

AUTOMATIC CALL POP

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

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.

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

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

PRIORITIZING QUEUED CALLS

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

CLICK-TO-DIAL

- Click-to-dial from within Sugar
- 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 Sugar

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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 **Sugar CRM Integration**:

Visit www.kakaposystems.com

Contact tellmemore@kakaposystems.com

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