

UNITY CRM INTEGRATION

Configuration

CONTENTS

1	OVERVI	EW1
2	CONFIG	URING SALESFORCE INTEGRATION
3	CONFIG	URING AGILE CRM INTEGRATION
4	CONFIG 4.1 4.2 4.3	URING MS DYNAMICS INTEGRATION
5	CONFIG	URING ZENDESK INTEGRATION
6	CONFIG	URING ZOHO CRM INTEGRATION
7	CONFIG	URING SUGAR CRM INTEGRATION
8	UNITY (CRM FUNCTIONALITY
	8.1	Contact Pop
	8.2	Contact Search
	8.3	Call Log Entry
	8.3.1	Manual Call Log Entry
	8.3.2	Automatic Call Log Entry

1 OVERVIEW

Unity seamlessly integrates with Agile CRM, Dynamics 365, Zendesk, Zoho CRM, Sugar CRM and 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.

This functionality relies on a CRM Integration license being assigned to the user, as shown below. Please note this license is required in addition to the base license for Unity Desktop, Agent, Supervisor or Reception, however this functionality is included in all trial licenses for these Unity clients.

Steve Tutt License Usage							
All licenses assigned to this user. A user can have only one permanent license per application. When adding a new permanent license, all existing permanent licenses for the same application v							
□ Include Inactive	License	Start Date	EndDate				
View	UnityAgent Enterprise	2014.06.24	Active Licens				
View	UnityCrmIntegration Standard	2016.09.12	Active Licen				
View	UnityDashboard Standard	2016.06.24	Active Licen				
View	UnityDesktop Enterprise	2013.08.19	Active Licen				
View	UnityMobile Standard	2015.09.03	Active Licen				
View	UnityReception Enterprise	2015.04.16	Active Licen				
View	UnitySupervisor Enterprise	2013.05.09	Active Licens				

Once this license is assigned and Unity is restarted, the CRM panel will become available in Settings, as shown below.

ervices Settings	
Skin Contact Search Contact Display Current Calls Computer/Phone Integration Dialing Rule Custom Directory Integration Outlook Keyr	Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation. Configuration Automatic Contact Pop CRM Platform None

To configure Unity to integrate with a CRM platform, simply select the CRM platform from the dropdown list and complete the required fields, as outlined in sections below.

You can also configure Unity to automatically pop the CRM contact when the phone is answered, as shown below.



2 CONFIGURING SALESFORCE INTEGRATION

Please note that Unity is only able to consume the Salesforce API if the appropriate salesforce license/edition is in use, please speak to salesforce for more information.

The Salesforce API requires a security token which must be requested through the Salesforce portal and is emailed to the logged in user. In order to request this security token and setup Unity please follow the below steps.

Log into Salesforce and click 'My Settings' in the top-right corner.

Cla	ssic view:	Lightning view:
	Chris Tutt 🔻 Setup Help & Training	☆▼ 🗄 ? 尊 🐥
	My Profile	Cale Jenna Wimshurst
	My Settings Developer Console Switch to Lightning Experience My Settings	eu6.salesforce.com Settings Log Out
	Logout	OPTIONS
		Switch to Salesforce Classic ① Add Username



On the left hand menu under Personal, click the 'Reset my Security Token' link. If you don't see this link you may not have the required license assigned, please speak to your Salesforce sales agent for more information. Confirm that you want to reset the security token.



You will shortly receive an email with the new security token, as below.



Go to Unity Settings and select Salesforce as the CRM platform. You will then be able to enter the login ID and password that you use when logging into Salesforce, as well as the security token from the email, please make sure you copy this directly from the email and paste it directly into the correct box in Unity, as shown below.

Services & Settings)	
Services Settings			
Unity Settings Appearance Contact Search Contact Display Current Calls	Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation.		
Computer/Phone Integration Circhoard Integration	Configuration Automatic Contact Pop		
··· Dialling Rule	CRM Platform		
Custom Directory Integration Configuration	Salesforce		
Configuration Outlook Integration Browser Integration CRM CRM CIck To Dial	Login ID jenna.wimshurst@kakaposystems.com		
Desktop Integration Notification	Password *********		
Unity Connect	Security token		
Quick Keys Key Combinations	dvBmi1gzJgDzv8A5iCu7NvTAZ		
Commands	Include contacts		
- Update	Include leads		
Instant Messaging & Presence	☐ Include accounts		
Logging XMPP	Show record type when searching		
Security			
Connection	✓ Close call log entry immediately		

You can also choose whether to include contacts, leads and/or accounts from Salesforce, in most cases all three would be selected.

Unity can also include the record type when showing a contact from Salesforce, making is easy to identify inbound calls from leads.

Lastly, Unity allows the user to add a call log entry into Salesforce for any call, assuming the remote party was found in Salesforce. This feature is outlined further below, but you can also configure Unity to automatically add a call log entry if one hasn't been added manually. This includes both inbound and outbound calls and even calls that were unanswered.

Cor	ntacts	Call Logs	Voicemail	Abandoned Calls	
Search Natalie				Q	
Name					
Natalie Maines (Salesforce Contact)					

Click on the Automatic Contact Pop tab to configure these parameters, then click Save. You will be able to test the integration by performing a search for a contact within Unity, you should see Salesforce records appear in the list as well as from all other directories. If in doubt you may want to activate the 'Show record type when searching' setting in order to distinguish between Salesforce records in the search results.

3 CONFIGURING AGILE CRM INTEGRATION

The Agile CRM API requires an API key which can be obtained through the web portal, the below steps allow you to configure Unity to integrate with the Agile CRM platform through your user account.

Ø	Add 🔻	D			
Chris Tutt	Chris Tutt				
Preference	Preferences				
Admin Set	Admin Settings				
Theme & l	avout				

Log into Agile CRM and click on 'Admin Settings' under the account button in the top-right corner.

Preferences	API Key
Users	REST API
Custom Fields	uja78sbdp8li8cstuc5eru4rjp
Deals	For Java, PHP, .Net wrappers and integrations like Zapier, Wufoo,
Tags	Javascript API Key 9cb51hpr059pboolqb199s6tch Reset
Tasks	Only for tracking code on website.
Telephony	Analytics Code
Service	
Integrations	Allowed Domains
API & Analytics	IP Filters

Click on 'API & Analytics' from the menu on the left, then copy the REST API field from the webpage, as shown here. Please be sure to capture all text, it may be helpful to paste to Notepad to ensure you have all characters [without formatting] before pasting into Unity. Go to Unity Settings and select Agile CRM as the CRM platform. You will then be able to enter the login ID and password that you use when logging into Agile CRM, as well as the API key that you have copied from the webpage.

Services & Settings		
rvices Settings		
Unity Settings Contact Search Contact Display Current Calls	Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation.	
Computer/Phone Integration Clipboard Integration	Configuration Automatic Contact Pop	
··· Dialling Rule	CRM Platform	
Configuration	Agile v	
- Outlook Integration		
Browser Integration	Domain	
CRM Click To Dial	unityclient .agilecrm.com	
- Desktop Integration	Login ID	
··· Notification	jenna.wimshurst@unityclient.com	
Unity Connect	API key	
Wey Combinations	cd5c5dsdfds9g8r4s2	
Commands		
Startup		
Update	✓ Include companies	
	✓ Show record type when searching	
- XMPP	Automatically add call log entry	
Security		

Note: Please ensure the domain excludes any suffixes such as .com/.org etc as the domain must be appended with agilecrm.com. For example, the below will fail:

D	Domain				
u	nityclient.com		.agilecrm.com		

Instead the domain should be:

.agilecrm.com
.a

Unity Supervisor: Jenna Wimshuint - Available (duration: 01-42:50) File Messaging Tools Help							
Markus Zusak -	90	00	0		0	0 0	ł
Cloud Services UR				My St	abstics		
会会会会 Q 0	Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Tot
17 tota Constant	Bolts Sales	0	0	0	00:00	00:00:00	10
CR EQUICONDACS	Nuts Sales	0	0	0	00:00	00:00:00	. 6
	O Customer Support	-	-	-	-		
Owner	O Partner Support	14				-	
Jenne Wimshurst		0	0	Ø	00:00	00:00:00	
	From			To			
cloud x services x uk x DAdd							
	Contacts Call Logs	Abandoned Ca	lis Voicemai	Agent Activity			
	Search Larry		10				
Contact Into	and the second second						
ATT A CONTRACT OF A CONTRACT O	Name			Pt	one		
01000515695 (##80#	Markus Zusak (Aglie	CRM Contact - M	obile)	07	976493815		
mausaik@cloudservicesuk.com	Larry France			00	18008813055 e	uan. 502	

Please take care when entering the domain as this is a common reason for Agile CRM integration not working as expected.

It may be useful to include the Agile record type when testing the connection. To do this simply perform a contact search and compare the results to Agile CRM.

4 CONFIGURING MS DYNAMICS INTEGRATION

4.1 INTEGRATING MS DYNAMICS

To integrate your MS Dynamics into Unity go to Settings>CRM then select Dynamics from the drop down menu.

If your MS Dynamics is Online or Office 365 deployment then tick the box and select an online region.

U Services & Settings		×
Services Settings		
- Unity Settings - Appearance - Skin - Contact Search - Contact Display - Contact Display - Contact Display - Contact Display	Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation.	
Current Calls	Configuration Automatic Contact Pop	
Computer/Hone Integration Complexer/Hone Integration Clibboard Integration Dialing Rule Configuration Outlook Integration Outlook Integration Comfiguration Outlook Integration Octor Dial Desktop Integration Octlo Coll Outlook Integration Outlook Integration Outlook Integration Octlo Coll Outlook Integration Outlook Integratintegration Outlook Integratinteg	CRM Platform Dynamics V Online or Office 365 deployment Server address crm11 .dynamics.com Domain My Domain Login ID user@mydomain.com	
Startup	Password	
Update	******** 🕡 Test	

If your MS Dynamics is not Online or an Office 365 deployment, then leave the box empty and enter a server address.



Enter the domain, login ID and password then click Test to ensure the details are correct.

4.2 ONLINE AND OFFICE 365 DEPLOYMENT

ect organization	
Organization	
	🗙 Cancel 🛛 🗸 OK

Select organization

If you have selected an Online or Office 365 Deployment, then this pop up may appear.

Select your organization from the drop down menu and click OK.

Once you have selected the organization you will need to enter the login id and password used to access MS Dynamics as well as your Dynamics server address, as shown below.

rvices Settings					
- Unity Settings - Appearance - Skin - Contact Search - Contact Display	Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation.				
Current Calls	Configuration Automatic Contact Pop				
- Clipboard Integration Dialling Rule	CRM Platform				
Custom Directory Integration	Dynamics V				
····· Configuration	Online or Office 365 deployment				
Browser Integration	Server address				
CRM	crm11 .dynamics.com				
Desktop Integration	Domain				
···· Call Notification	My Domain				
- Unity Connect	Login ID				
Key Combinations	user@mydomain.com				
Commands					

4.3 LOGIN ID AND PASSWORD

If you are using Online or Office 365 Deployment, enter the login ID and password along with your domain.



Click the test button to save and test the log in details.

Once the CRM connection test has been successful click OK.

5 CONFIGURING ZENDESK INTEGRATION

To integrate your Zendesk into Unity go to Settings>CRM then select Zendesk from the dropdown menu.

Enter the domain, login ID (which is normally the email used to login) and the API Key.

Please note that you don't need to enter a password as the API Key is all you need to authenticate. Each user can have a separate API Key, or all users in a business can use the same one.

re Unity to seamlessly integrate with a CRM platform for c uration Automatic Contact Pop	contact search and CLI presentation
uration Automatic Contact Pop	
Platform Jesk	~
ain	
/Clent	.zendesk.com
a.wimshurst@kakaposystems.com	
Key	
wQj3cU1xECUGfeA47Oe5TlGSiOB9MeZDSfZu	③ Test
how record type when searching	
utomatically add call log entry	
Close call log entry immediately	
	desk nain yClient n ID na.wimshurst@kakaposystems.com Key QwQj3cU1xECUGfeA47Oe5TlGSiOB9MeZDSfZu how record type when searching uutomatically add call log entry

Click the test button to save and test the log in details.

Once the CRM connection test has been successful click OK.

6 CONFIGURING ZOHO CRM INTEGRATION

Go to Unity Settings>Settings>CRM and then select Zoho from the dropdown list of CRM platforms.

. Cattings			
Prvices Securigs			
Contact Display Current Calls Computer/Phone Integration Clipboard Integration Dialling Rule	^	Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation.	
Custom Directory Integration Configuration Outlook Integration Browser Integration		Configuration Automatic Contact Pop CRM Platform	
CRM — Click To Dial — Desktop Integration — Notification		Zoho ~ Authorisation token not saved	

Click Authorise:

CRM Platform	
Zoho	~
Authorisation token not saved	
🥑 Authorise	

	Your default browser will then pop Zoho.com and ask you enter your account login details.	to
One account. Access all services. Sign In to access Accounts Email / Phone Password Reserve signed In Forgot Password? Sign In		
Vinity CRM Connector Unity CRM Connector would like to access the following information.	Once you've signed into Zoho, it will ask yo to accept the access request from Unity.	วน
By clicking the "Accept" button you allow Unity CRM Connector to acc Accept Reject	ess data in your Zoho account.	

Click Accept. You will then be informed whether the authentication have been successful or not. If it has been successful, you will see this screen:



If you clicked 'Reject' or the authentication failed, you will see this screen and will need to go through the process again:



7 CONFIGURING SUGAR CRM INTEGRATION

In order for Unity to integrate with Sugar CRM, an API Platform must be created in the Sugar CRM instance. Unity uses this to consume the Sugar API so it must be done before configuring Unity clients, but it only needs to be done once per Sugar CRM instance (which will then apply to all users).



When logged in as an administrator, click Admin from the context menu. If you don't see this menu option then you are not logged in as an administrator.

Under Developer Tools, click Configure API Platforms.

Rename Modules	Change the names of the modules appearing within the application
Display Modules and Subpanels	Choose which modules are displayed in the navigation bar and which subpanels are displayed system-wide
Configure Navigation Bar Quick Create	Select which modules are available in the navigation bar quick create
Configure API Platforms	Configure enabled custom API platform names

Add an API platform called 'unity' – please note this is all lower case.

API Platforms			API Platforms
base	*		base
mobile			mobile
portal			portal
орі			opi
lpi			Ipi
collabspot		\neg	collabspot
collabspotbackend			collabspotbackend
			unity 😑
	-		
unity 4	٨dd	_	Add
Save		* [Save Cancel

Click Add to add the API to the list, then click Save to update.

Go to Unity Settings>Settings>CRM and then select Sugar from the dropdown list of CRM platforms.

ices Settings	
Computer/Phone Integration Current Calls Computer/Phone Integration Clipboard Integration Clipboard Integration Configuration Configuration Configuration Browser Integration Click To Dial Desktop Integration Click To Dial Cli	Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation. Configuration Automatic Contact Pop CRM Platform SugarCrm Login ID
Conversations	Password
Unity Connect	
ULICK Keys	LIRI
Key Combinations	OKE

Enter your login ID, password and URL. The URL will be the same that is used to log into the Sugar CRM portal, it must start with https://

Unity × The CRM connection test succeeded OK	Click Test. If the details are correct then you will see this pop up.
Unity × Unity was unable to connect to the CRM platform using the login details provided. The error returned is below The remote server returned an error: (401) Unauthorized. OK	If the details are incorrect then you will see this pop up and will need to enter the correct details to integrate Sugar CRM.
URL https://kfntk2671.trial.sugarcrm.eu Include contacts Include leads Include accounts Show record type when searching Automatically add call log entry Close call log entry immediately	Once the Test has been successfully completed you can choose whether to include contacts, leads and/or accounts from Sugar by selecting the boxes shown here.

Unity can also include the record type when showing a contact from Sugar, making is easy to identify if a call is from a Contact or Lead.

If the account doesn't have access to search contacts, leads or accounts (depending on the license type of the user in Sugar CRM) then Unity will automatically uncheck the related setting to ensure it doesn't continue to search for that entity type.

8 UNITY CRM FUNCTIONALITY

8.1 CONTACT POP

From

🕒 Natalie Ma

Unity will use the CRM to identify inbound and outbound calls, including queued call center calls.

То

.

×

00 💎

Contacts	Call Logs	Voicemail	Abandone	d Cal	Is Agent A	ctivity
Search	nat		Q			
Nam	е					Phone
Natal	lie Maines (Zendesk Us	er)	t	Call numb	070764020
Nate Olson-Daniel			Send emai	il		
					Show CRN	1 contact
					Copy num	ber
					Personal d	lirectory +
				٥	Manage u	ser list
					Appearan	te →

Assign call to account code

+ Add number to personal directory

Show CRM contact

To: Jenna Wimshurst

From: Natalie Maines (Zendesk User)

Add CRM call log entry Reset column widths Show gridlines At any time, you can search for CRM contacts from within Unity and perform click to dial to make an outbound call to the contact, or display the contact in the CRM platform (this is referred to as 'popping' a contact) as shown here.

You can also right-click a call to pop the record in the CRM using the default browser, as shown here. This assumes the contact was found in the CRM platform rather than another directory (for example an Outlook contacts folder).

You can also click on the call details 'toast' notification popup to pop the contact, as shown here. Again this assumes the contact was found in the CRM platform.

This feature depends on the appropriate Call Notification setting being activated, as shown below.

Services Settings	
- Skin - Contact Search - Contact Display - Current Calls - Computer/Phone Integration	 Specify how to be notified of incoming or outgoing calls. When browsing to a URL use the [Number], [Direction], [CalIID] and [LoginID] placeholders which Unity will then replace with the call details.
Clipboard Integration Dialling Rule Custom Directory Integration Configuration Outlook Integration Browser Integration CRM Deskton Integration CallNotification Unity Connect Quick Keys Key Combinations Commands	 Show remote party phone number On an incoming or outgoing call Override the contact name using the number Ø perform auto answer when using click-to-dial Ø pop Unity Ø auto-hide Unity when call completes Ø pop summary notification for seconds
- Startup - Update - Logging - Logging - Security - Language - Connection - Network	When call details clicked Image: pop Unity pop Outlook (if applicable) Image: pop CRM (if applicable) Image: powse to URL (if entered)

Unity can also be configured to automatically pop the CRM contact when the call is answered, which depends on the Automatic Contact Pop tab settings as shown below.



8.2 CONTACT SEARCH

When you perform a contact search, Unity will check all directories such as the group/ enterprise phone list, personal directory and Outlook etc, but it will also search the CRM system and return results. You can search on contact name or company name, as shown below. Simply double click an entry to call that number.

Mary Roach × + Add Unity Supervisor: Jenna Wimshurst - Available (duration: 01:40:50)									
			File Messaging T	ools Help					
No orga	nization Mary	Roach	8.0		0		0		
Ro	le End-user					MuSt	atistics		
						My St	My Statistics		
Acce	SS Can view and	d edit own tick	Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Т
			Bolts Sales	0	0	0	00:00	00:00:00	
			Nuts Sales	0	0	0	00:00	00:00:00	
Primary email	y many roach1	34567@am	O Customer Support						
	il	Louis a ginni	O Partner Support	-	-	-	-	-	
Pho	e 07976493816	5 (direct line)		0	0	0	00:00	00:00:00	
_	+ add contae	t	From			То			_
Ta	js -								
Org			Contacts Call Logs	Abandoned Cal	Is Voicemail	Agent Activity			
Langua	e English		Search Mar		Q				
Time zoi	(GMT+00:00)) Casablanca	Name			Ph	one		
Deta	ls -		📞 Mary Roach (Zen	desk User)		07	976493815		
			Many McCourin			00	180088		_



You can also right-click entries to send an email using the default mail program.

8.3 CALL LOG ENTRY

When integrated with the CRM, Unity can add call log entries on behalf of the user, as outlined below.

8.3.1 Manual Call Log Entry

Right-click on a call and select to add a call log entry, as shown below.



Unity will enter basic details of the call depending on if the call is inbound or outbound, as shown below. Remember this call log will be stored in the CRM so an outbound call in Unity is an inbound call in the CRM, because we have called the contact.

The call note will be saved against that contact in the CRM platform, please note that you can specify whether to close the status of the call log entry in the CRM platform or keep it open by ticking the box.





We can now add further notes manually, then click OK to save the call log entry. If we click Show CRM Contact or Cancel the call log will **not** be saved.

You will now see this call log entry in the CRM, as shown below.

#16	Call received from Jenna Wi	less than a minute ago
Status: Closed	open Task #16	
#17	Ca Call received from Jenna Wi	
< #15	Ca Call received from Jenna Wimshurst Called to confirm the support ticket had been resolved	7
< #14	Can made to sering windonarde	To minutes ago

8.3.2 Automatic Call Log Entry

Unity can be configured to automatically add a call log entry for any calls where a call log hasn't been manually created using the steps above. This feature is activated as shown below.

ervices Settings						
- Unity Settings - Appearance - Skin - Contact Search -	Configure Unity to seamlessly integrate with a CIBI platform for contact search and CLI presentation.					
- Current Calls	Configuration Automatic Contact Pop					
Computer/Phone Integration	CRM Platform					
Custom Directory Integration	Zendesk	~				
Configuration	Domain					
Browser Integration	UnityClient	.zendesk.com				
CRM CRM	Login ID					
-Desktop Integration	jenna.wimshurst@kakaposystems.com					
- Call Notification	API Key					
Quick Keys	1.0QwQl3cU1xECUGfeA47Oe5TiGSiOB9Me2D5fZu	😨 Test				
- Key Combinations	Show record type when searching	-				
Startup	Automatically add call log entry					
Update	Close call instentry immediately					

Unity will automatically add call log entries when the call is released [the same time it is removed from the Active Call List in Unity]. Only basic information on the call is presented, based on the direction of the call and the Unity user that made or received the call. Salesforce will timestamp the call internally.

This shows an unanswered call from the CRM contact to the Unity user.

Task Call					
Click to add topics:					
1 7 31					
Task Detail			Edit Delete	Create Follow-Up Task	Att Create Follow-Up Ever
▼ Task Information					
	Subject	Call			
	Assigned To	Chris Tutt			
	Name	Toby Southfield			
	Comments	Call made to Chris Tutt (Unanswered)			

Home	Contacts	Accounts	Leads	Opportunities	Reports	Dashboards	Chatter	Files	Products	Forecasts	+
	Task										
1	Call										
Click t	to add topics:	0									
2	** =	1 7 31									
											Atta
Tasl	k Detail							Edit	lete Create F	ollow-Up Task	Create Follow-Up Event
▼ Tas	k Informatio	on									
				Subject	Call						
				Assigned To	Chris Tutt						
				Name	Toby Southfie	ld					
				Comments	Call received	from Chris Tutt					
▼ Add	litional Info	rmation									
				Priority	Normal						
				Status	Completed						
▼ Sys	tem Inform	ation									
				Created By	Chris Tutt, 29/	09/2016 18:44					

This shows an answered call from the Unity client to the CRM contact.



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