

UNITY CRM INTEGRATION

Zendesk

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1 OVERVIEW

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 Zendesk.

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.

If a CRM Connector license has not previously been assigned to the user, then a trial license will automatically be assigned the first time CRM configuration settings are entered in Unity.

| Details Branding License Details History L | call Center Activity | | | | | | |
|---|---|--------------------------------|---------------------------------|--|--|--|--|
| Steve Tutt License Usage | | | | | | | |
| All licenses assigned to this user. A user can have o | nly one permanent license per application. When adding a new permanent license, | all existing permanent license | s for the same application will | | | | |
| □ Include Inactive | License | Start Date | EndDate | | | | |
| View | UnityAgent Enterprise | 2014.06.24 | Active License | | | | |
| View | UnityCrmIntegration Standard | 2016.09.12 | Active License | | | | |
| View | UnityDashboard Standard | 2016.06.24 | Active License | | | | |
| | Unit-Dealthen Enternaise | 2013 08 19 | Active License | | | | |

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 Olipboard Integration Olipboard Integration Outlook Outlook Outlook Integration Outlook Outlook Integration Outlook Outlook | 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 ZENDESK INTEGRATION

2.1 INTEGRATING ZENDESK

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.

| ervices Settings | | |
|---|--|--|
| - Unity Settings - Appearance - Skin - Contact Search - Contact Display | Configure Unity to seamlessly integrate with a CRM platform fo | r contact search and CLI presentation. |
| Current Calls | Configuration Automatic Contact Pop | |
| Clipboard Integration | CRM Platform | |
| - Custom Directory Integration | Zendesk | ~ |
| Configuration | Domain | |
| - Outlook Integration | UnityClent | zendesk com |
| CRM | Unicyclienc | .zendesk.com |
| Click To Dial | Login ID | |
| - Desktop Integration | jenna.wimshurst@kakaposystems.com | |
| - Call Notification | API Key | |
| Quick Keys | IL0QwQj3cU1xECUGfeA47Oe5TlGSiOB9MeZDSfZu | ③ Test |
| - Key Combinations Commands | Show record type when searching | |
| Startup | Automatically add call log entry | |
| Update | Close call log entry immediately | |



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

Once the CRM connection test has been successful click OK.

3 UNITY CRM FUNCTIONALITY

3.1 CONTACT POP

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

You can search for CRM contacts within Unity to perform click to dial and make an outbound call. To display the contact in the CRM platform (this is referred to as 'popping' a contact) simply right click on the contact, as shown below.

| Contacts | ntacts Call Logs Voicemail Abandoned Calls Agent Activity | | | | vity | |
|--------------|---|------------|---------------|----------|-------------|-----------|
| Search nat Q | | | | | | |
| Nam | е | | | | | Phone |
| 📞 Nata | lie Maines (| Zendesk Us | er) | _ | | 070764020 |
| 📞 Nate | Olson-Dani | el | | C | Call number | T |
| | | | | | Send email | |
| | | | | | Show CRM | contact |
| | | | | | Copy numb | er |
| | | | Personal dire | ectory + | | |
| | | ٠ | Manage use | r list | | |
| | | | | | Appearance | • |

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

| From | То | |
|-----------------|----------------------------------|--|
| S Natalie Maine | Assign call to account code | |
| + | Add number to personal directory | |
| | Show CRM contact | |
| | Add CRM call log entry | |
| | Reset column widths | |
| ~ | Show gridlines | |

You can also click on the call details 'toast' notification popup to pop the contact, as below. 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.



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.

| Services Settings | |
|--|---|
| Skin Contact Search Contact Display Current Calls Computer/Phone Integration | Configure Unity to seamlessly integrate with a CRM platform for contact search and CLI presentation. |
| Clipboard Integration Dialling Rule Custom Directory Integration Longartion | Configuration Automatic Contact Pop Image: Contact Pop < |
| Outlook Integration Browser Integration GrM | Itat is through a call center Itat is not through a call center |
| Desktop Integration Call Notification Unity Connect | Everytime I make an outbound call that is through a call center |
| Quick Keys | It is not through a call center |

3.2 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 Zendesk and return results. Simply double click or right click an entry to make the call.

Please note that you will need to type in a minimum of three letters to search for a CRM contact.

| 1 | A Mary Roa | ch × + Add | Unity Supervisor: Je File Messaging To | nna Wimshurst · ools Help | - Available (du | ation: 01:40:50) | | | |
|----------|-------------|----------------------------|---|------------------------------|-------------------|------------------|----------------------|--------------------|---|
| | No organiza | ation Mary Roach | Q 🕢 | | 0 (| | 0 | |) |
| 2 | Role | End-user | | | | My Sta | atistics | | |
| I. | Access | Can view and edit own tick | Name | Total Calls | Answered Calls | Missed Calls | Average Talk Time | Total Talk Time | T |
| n | | | Bolts Sales | 0 | 0 | 0 | 00:00 | 00:00:00 | |
| * | | | Nuts Sales | 0 | 0 | 0 | 00:00 | 00:00:00 | |
| | Primary | mary roach1234567@gm | Customer Support | - | - | - | - | - | |
| | email | mary roach 254507 @gmai | O Partner Support | - | | - | - | - | |
| | Phone | 07976493816 (direct line) | | 0 | 0 | 0 | 00:00 | 00:00:00 | |
| | | + add contact | From | | | То | | | |
| | Tags | - | | | | | | | |
| | Org. | | Contacts Call Logs | Abandoned Cal | lls Voicemail | Agent Activity | | | |
| | Language | English | Search Mar | | Q | | | | |
| | Time zone | (GMT+00:00) Casablanca | Name | | _ | Pho | one | | |
| | Details | - | 📞 Mary Roach (Zen | desk User) | | 079 | 976493815 | | |
| | | | | | | | | | |

| C | 📞 Sally Black 👸 | | Call number | |
|----------|-----------------|-------------|------------------|--|
| 5 | Sally Jone | Call number | | |
| C | Sally Jone | | Send email | |
| C | Sally Wain | | Show CPM contact | |
| C | Sally White | | | |
| | | | Copy number | |

You can also right-click entries to send an email (if the CRM contact has an email address assigned) using the default mail program.

3.3 CALL LOG ENTRY

When integrated with Zendesk, Unity can add call log entries on behalf of the user, as outlined below. Unity will create tickets for call logs and contact center conversations, and the ticket type will be set as a 'Task'.

3.3.1 Manual Call Log Entry

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

| From | То | Duration | Status |
|------------|---------------------------------------|---------------------|---------|
| Chris Tutt | L Add number to perso | nal directory 00:00 | Ringing |
| | Show CRM contact | | |
| | Add CRM call log ent | ry | |
| | Reset column widths Show gridlines | | |



You can now add further notes manually, then click OK to save the call log entry.

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

| Key Combinations Include contacts Commands Include leads Update Include accounts Instant Messaging & Presence Include accounts Logging Show record type when searching XMPP Automatically add call log entry Language Close call log entry immediately Connection Network |
|---|
|---|

If you click Show CRM Contact or Cancel then the call log will **not** be saved.

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

| Mary I Tickets (5) Sec | Mary Roach Tickets (5) Security Settings | | | | | | | | |
|---------------------------|---|------------------------|--|--|--|--|--|--|--|
| Requested tickets | (5) ~ | | | | | | | | |
| #16 | Call received from Jenna Wi | less than a minute ago | | | | | | | |
| Status: Closed | open Tack #16 | | | | | | | | |
| #17 | Ca Call received from Jenna Wi | | | | | | | | |
| ≤ #15 | Ca Call received from Jenna Wimshurst Called to confirm the support ticket had been resolved | _ | | | | | | | |
| c #14 | Cali-made to zerma winnonaiot | To minutes ago | | | | | | | |

3.3.2 Automatic Call Log Entry

| Services Settings | | | | |
|--|--|--------------|--|--|
| - Unity Settings - Appearance - Skin - Contact Search - Contact Denixy - | Configure Unity to seamlessly integrate with a CI94 platform for contact search and CLI presentation | | | |
| Current Cals | Configuration Automatic Contact Pop | | | |
| - Clpboard Integration | CRM Platform | | | |
| Custom Directory Integration | Zendesk | ~ | | |
| Configuration | Domain | | | |
| Outlook Integration Browser Integration | UntyClent | .zendesk.com | | |
| CRM | Look Ph | | | |
| - Cick To Dal | Leona wimihuratifikakanosystems.com | | | |
| - Call Notification | | | | |
| - Unity Connect | B 00w012011vECIIG6a4420x5TIGC0B9Ma205f2u | (Test | | |
| Key Combinations | C Chave record time when searching | e tur | | |
| Commands | S and record cype when pearcing | | | |
| - Startup | Automatically add 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 here.

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. Zendesk will timestamp the call internally.

| John E | Bonham | | | | + New Ticket |
|-------------------|--|-----------------|-----------------|---------|--------------|
| Tickets (10) Se | ecurity Settings | | | | |
| Requested tickets | (10) ~ | | | | |
| Status : Solved | | | | | |
| #9 | Call received from Chris Tutt | Monday 14:40 | Monday 14:43 | Support | Chris |
| 8 #5 | Call received from Chris Tutt (Unanswered) | Monday 08:10 | Monday 08:10 | Support | Chris |
| Status : Closed | | | | | |
| #12 | Call received from Chris Tu | Today 07:19 | Today 07:19 | Support | |
| A11 | Call received from Chris Tu | Yesterday 20:06 | Yesterday 20:06 | Support | |



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