

KAKAPO

SYSTEMS

UNITY CRM INTEGRATION

Zendesk

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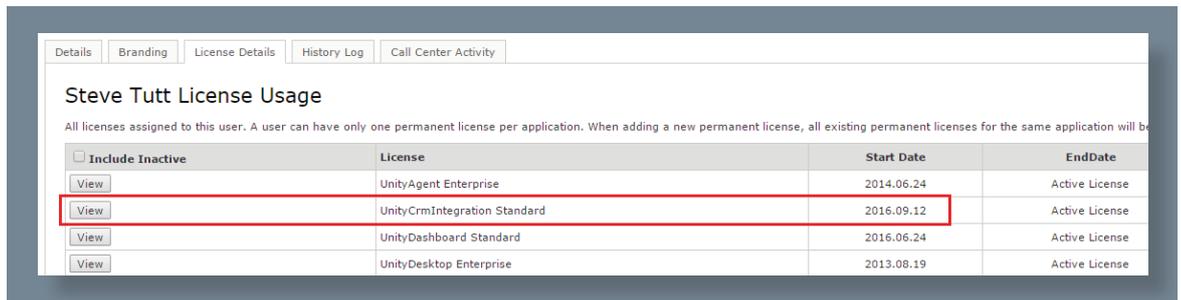
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1 OVERVIEW

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.

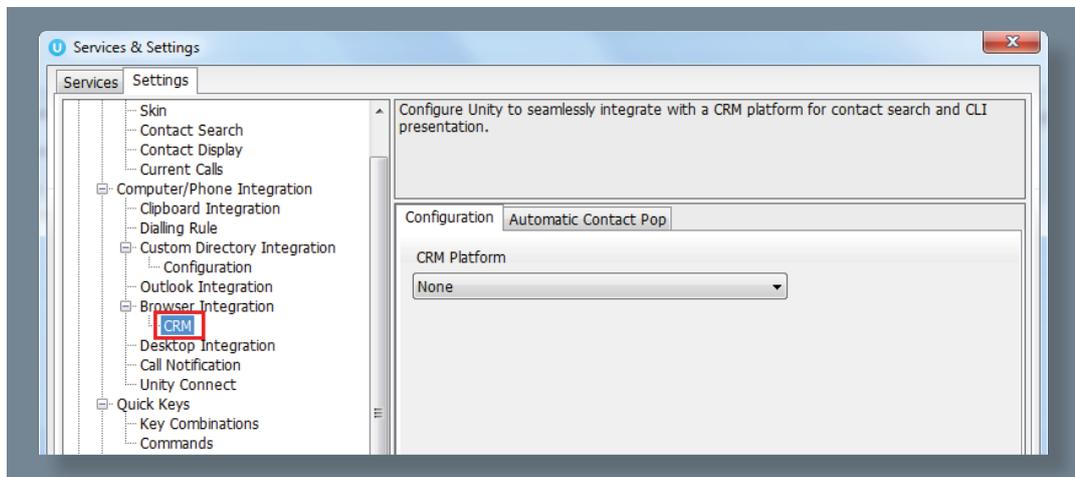
This functionality relies on a CRM Integration license being assigned to the user, as shown below. Please note this license is required in addition to the base license for Unity Desktop, Agent, Supervisor or Reception. However, this functionality is included in all trial licenses for these Unity clients.

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.



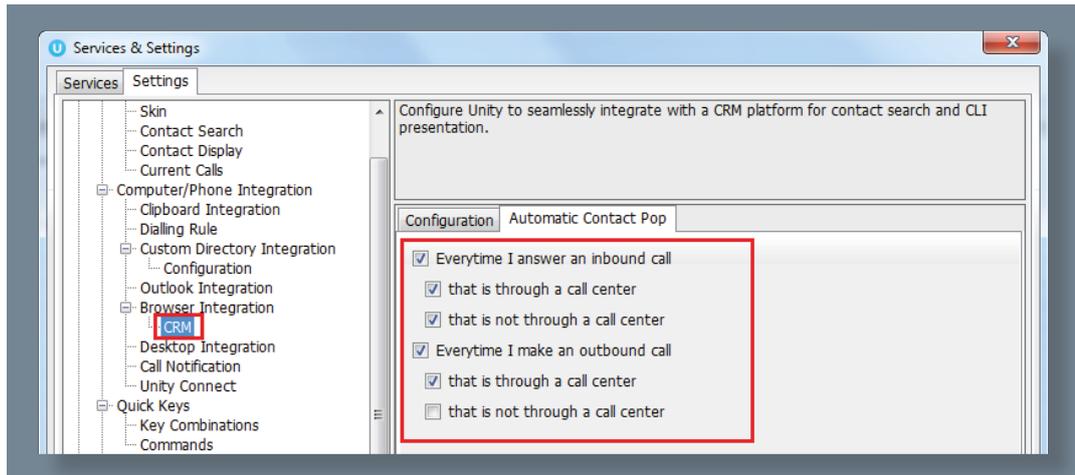
<input type="checkbox"/> Include Inactive	License	Start Date	EndDate
<input type="button" value="View"/>	UnityAgent Enterprise	2014.06.24	Active License
<input type="button" value="View"/>	UnityCrmIntegration Standard	2016.09.12	Active License
<input type="button" value="View"/>	UnityDashboard Standard	2016.06.24	Active License
<input type="button" value="View"/>	UnityDesktop Enterprise	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.



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.



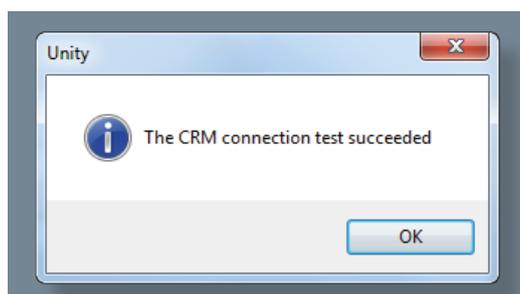
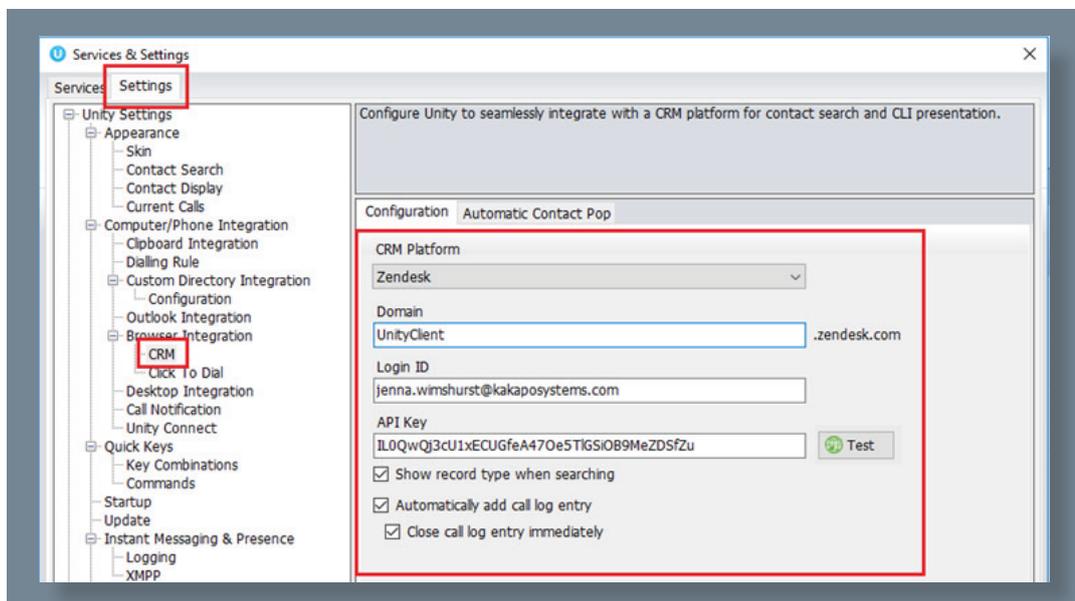
2 CONFIGURING ZENDESK INTEGRATION

2.1 INTEGRATING ZENDESK

To integrate your Zendesk into Unity go to Settings>CRM then select Zendesk from the drop-down 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.



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

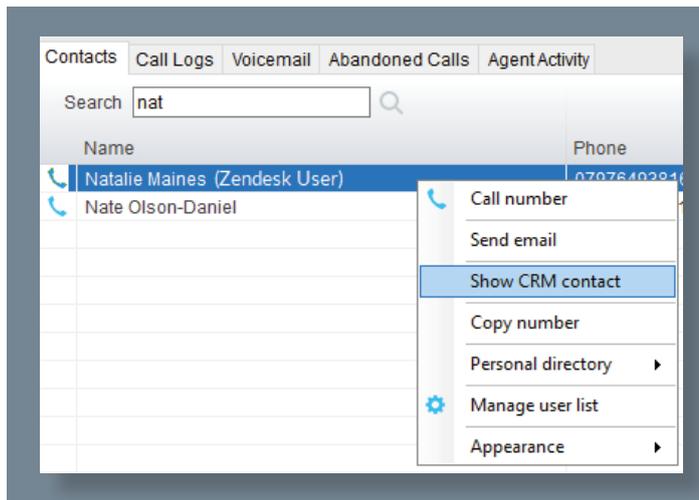
Once the CRM connection test has been successful click OK.

3 UNITY CRM FUNCTIONALITY

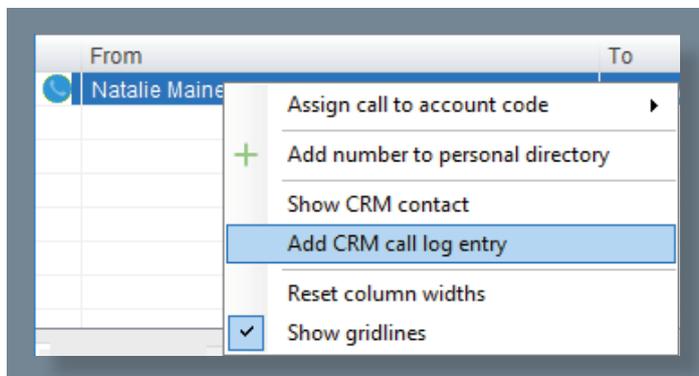
3.1 CONTACT POP

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.



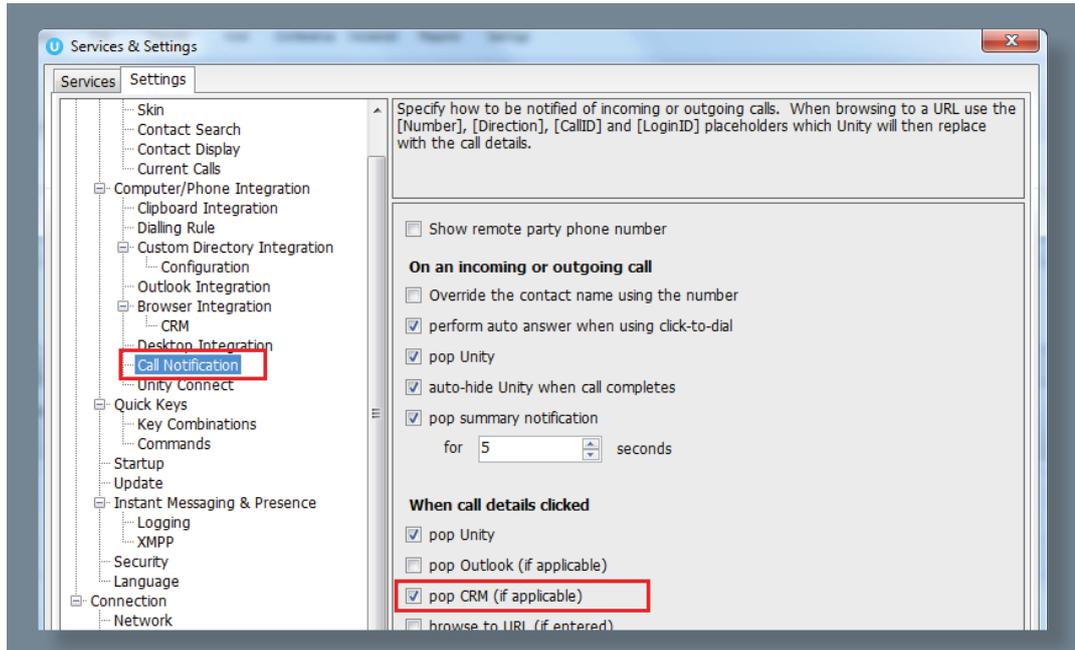
You can also right-click a call to pop the record in Zendesk using the default browser, as shown below. This assumes the contact was found in the CRM platform rather than another directory (for example an Outlook contacts folder).



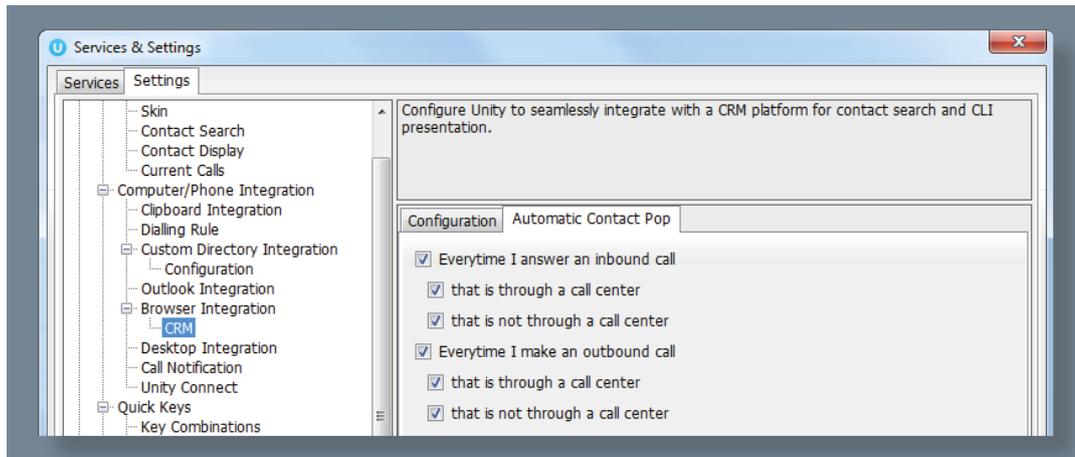
You can also click on the call details 'toast' notification popup to pop the contact, as below. Again, this assumes the contact was found in the CRM platform.



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



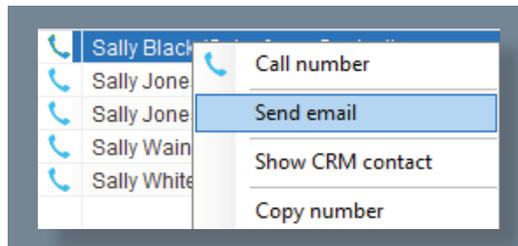
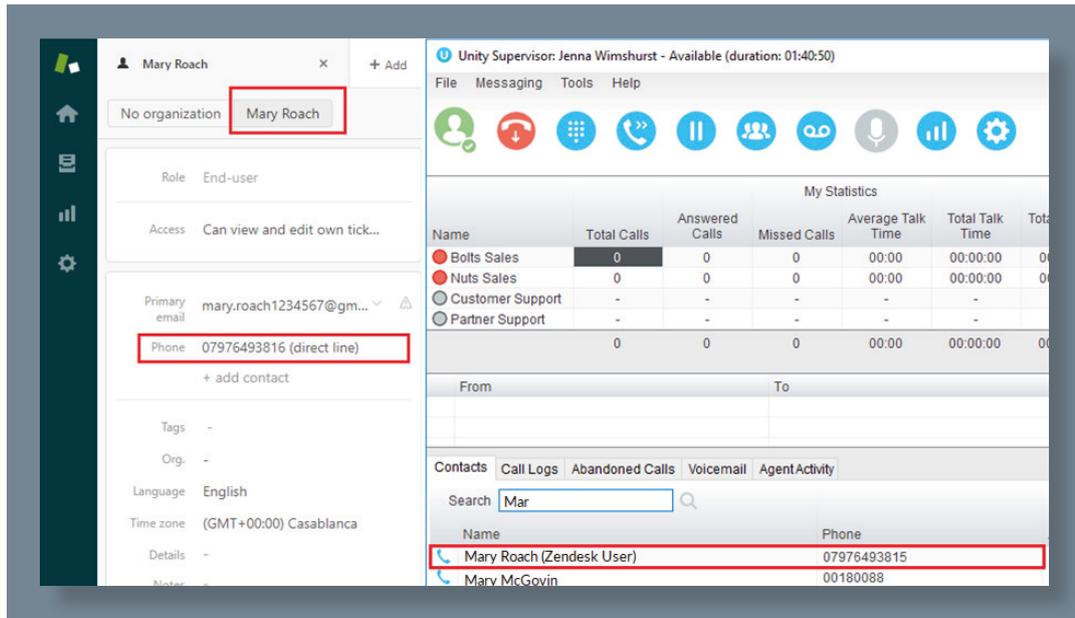
Unity can also be configured to automatically pop the CRM contact when the call is answered, which depends on the Automatic Contact Pop tab settings as shown below.



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.



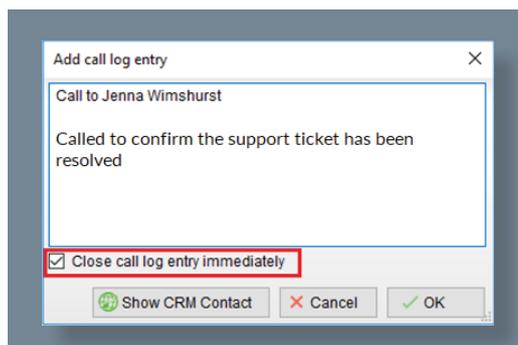
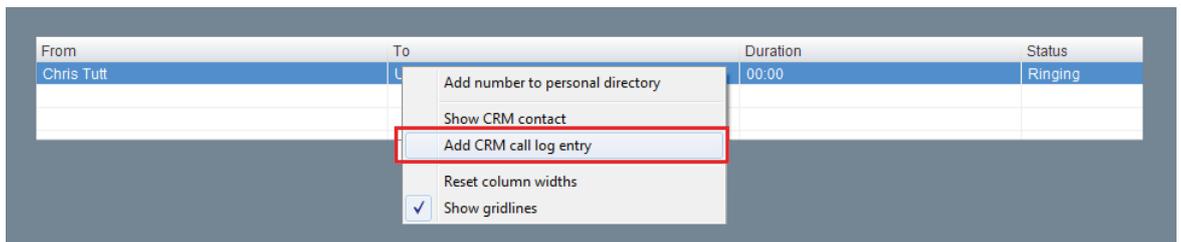
You can also right-click entries to send an email (if the CRM contact has an email address assigned) using the default mail program.

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'.

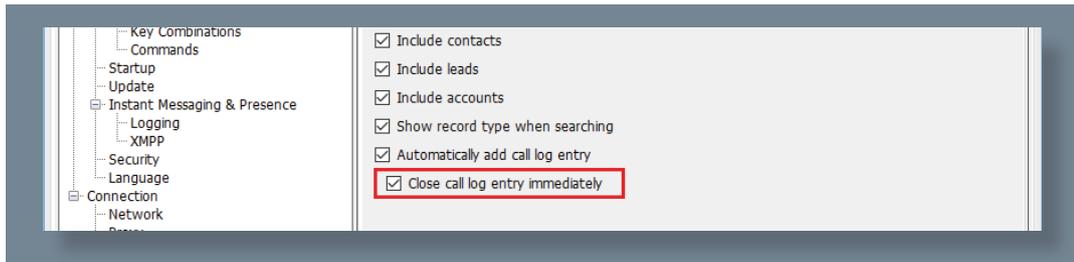
3.3.1 Manual Call Log Entry

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



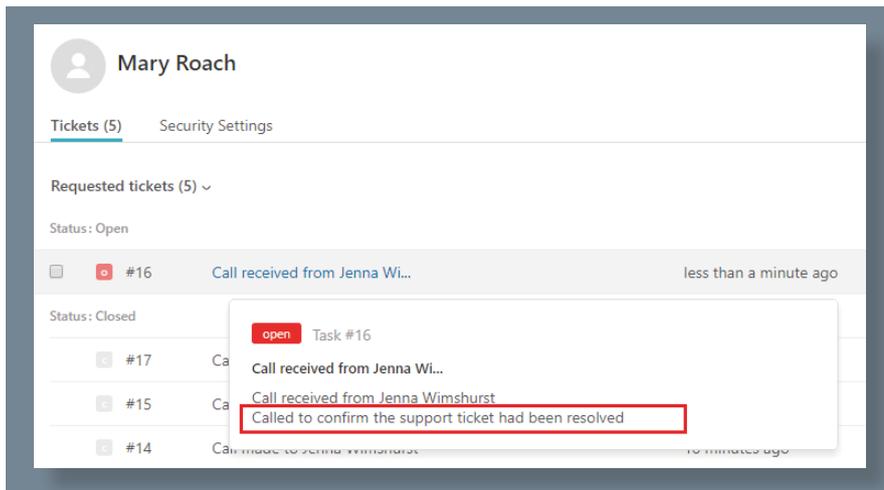
You can now add further notes manually, then click OK to save the call log entry.

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.

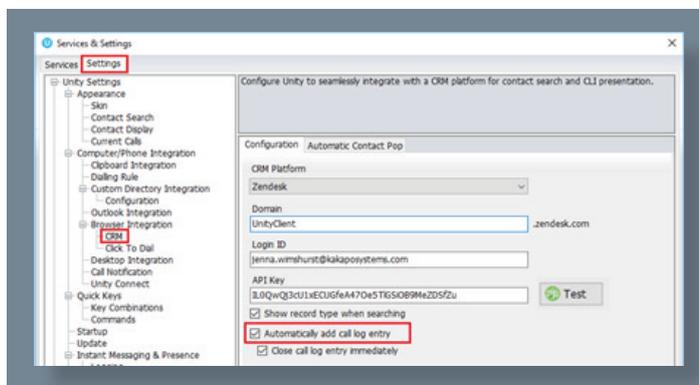


If you click Show CRM Contact or Cancel then the call log will **not** be saved.

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

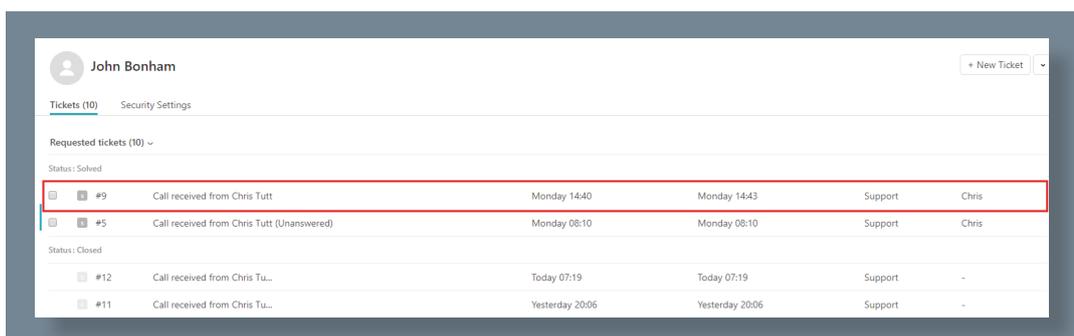


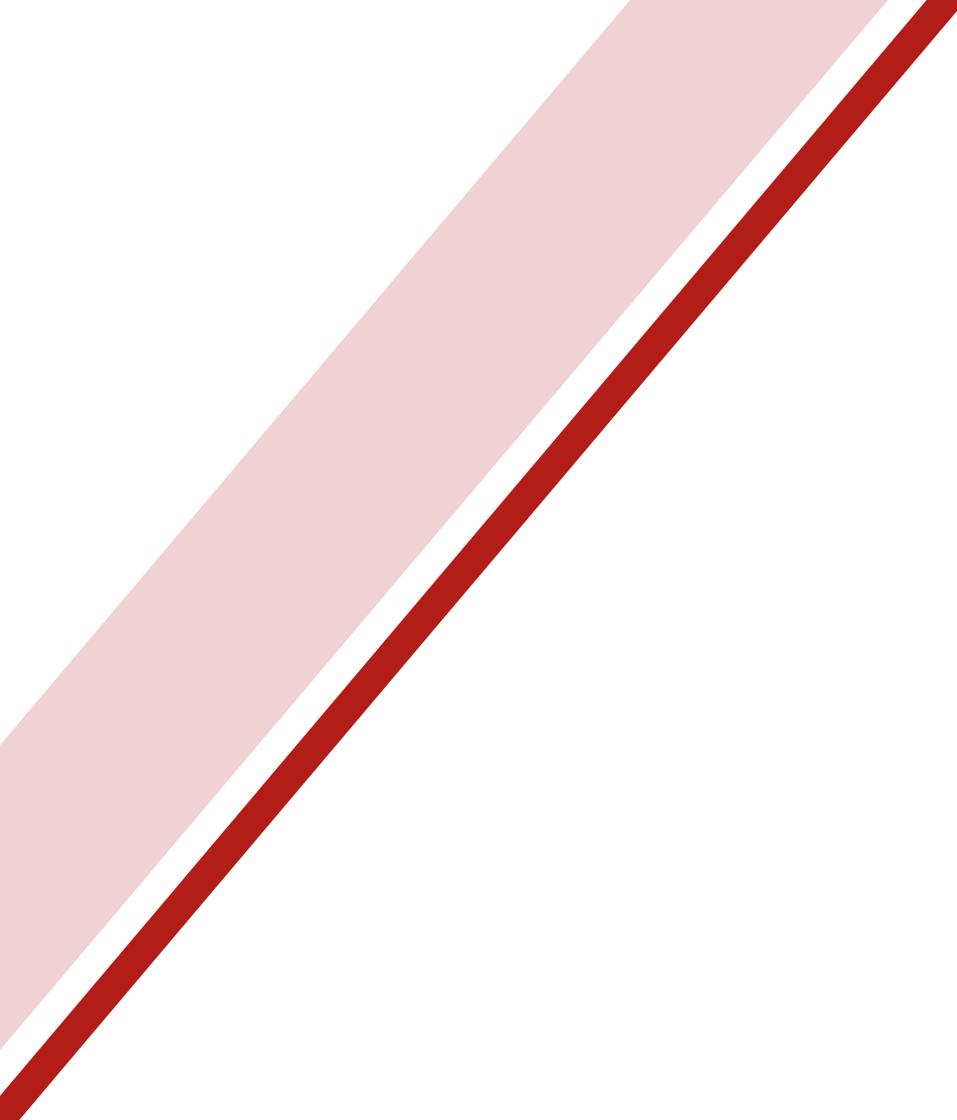
3.3.2 Automatic Call Log Entry



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 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.





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SYSTEMS

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