KAKAPO
SYSTEMS

ZOHO CRM INTEGRATION

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

COLLATE YOUR CONTACTS WITH UNITY AND ZOHO CRM

Unity seamlessly integrates with Zoho 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 Zoho, either automatically or when the user clicks the call notification. Outbound calls can be made from within Zoho direct, or through Unity Contact Search.

CLICK-TO-DIAL | CONTACT LOOKUP | QUEUE PROFILING | JOURNALING | CALL POPPING

ZOHO CRM INTEGRATION

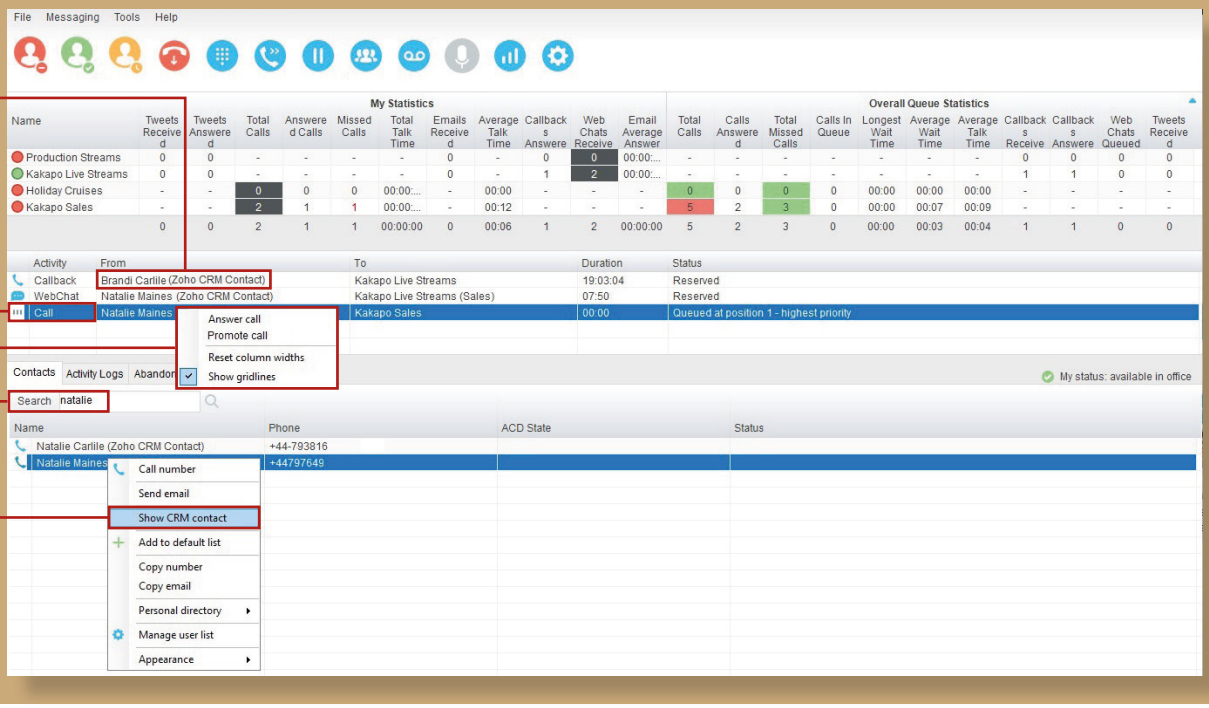
Auto pop Zoho contact on answer

Identify incoming Zoho calls

Prioritize Zoho leads in queue

Search Zoho within Unity

Open Zoho contact



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> UNITY SEAMLESSLY INTEGRATES WITH ZOHO 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.

CONTACT SEARCH

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

AUTOMATIC CALL POP

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

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 Zoho integration completely unifies all customer contact, including calls, emails, chats and tweets at a user level within Zoho.

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

PRIORITIZING QUEUED CALLS

- Prioritize contacts and leads
- Transfer Zoho users to VIP Queue
- Intelligently manage important calls

CLICK-TO-DIAL

- Click-to-dial from within Zoho
- 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 Zoho

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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 **Zoho CRM Integration**:

Visit www.kakaposystems.com

Contact tellmemore@kakaposystems.com

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