

UNITY CRM INTEGRATION USER GUIDE

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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.

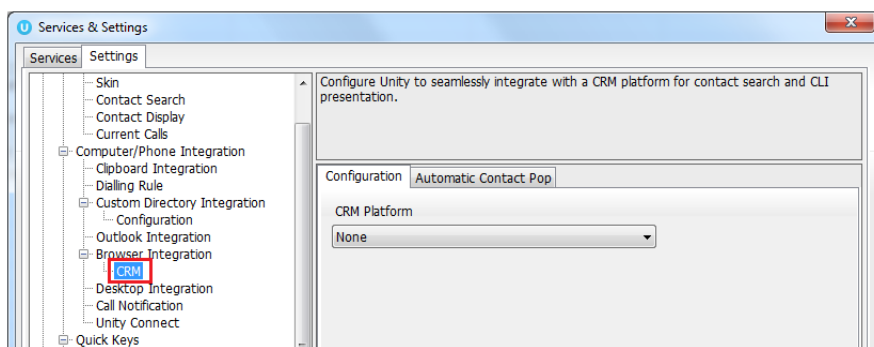
Details Branding License Details History Log Call Center Activity

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 will be

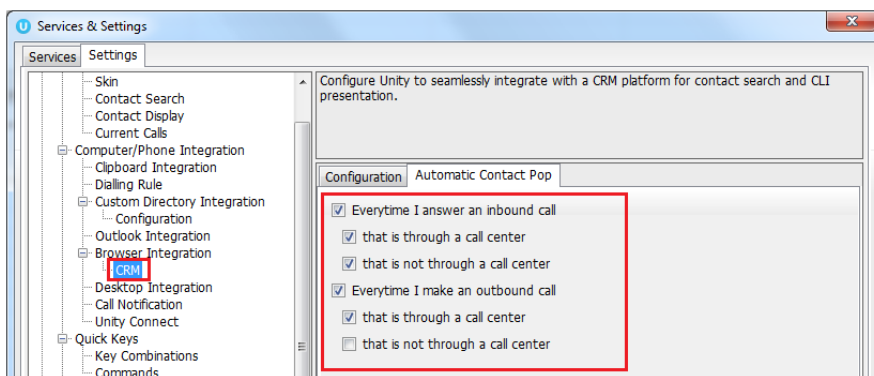
| <input type="checkbox"/> Include Inactive | License | Start Date | EndDate |
|---|------------------------------|------------|----------------|
| <input type="button" value="View"/> | UnityAgent Enterprise | 2014.06.24 | Active License |
| <input type="button" value="View"/> | UnityCrmIntegration Standard | 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 |
| <input type="button" value="View"/> | UnityMobile Standard | 2015.09.03 | Active License |
| <input type="button" value="View"/> | UnityReception Enterprise | 2015.04.16 | Active License |
| <input type="button" value="View"/> | UnitySupervisor Enterprise | 2013.05.09 | 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.

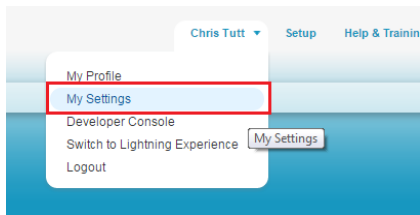


2 CONFIGURING SALESFORCE INTEGRATION

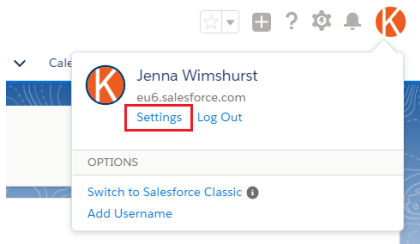
Please note that Unity is only able to consume the Salesforce API if the appropriate salesforce license/edition is in use, please speak to salesforce for more information. The Salesforce API requires a security token which must be requested through the Salesforce portal and is emailed to the logged in user. In order to request this security token and setup Unity please follow the below steps.

2.1 Log into Salesforce and click “My Settings” in the top-right corner.

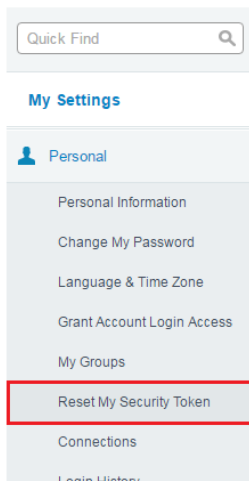
Classic view:



Lightning view:



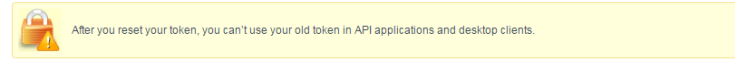
2.2 On the left hand menu under Personal, click the “Reset my Security Token” link. If you don’t see this link you may not have the required license assigned, please speak to your Salesforce sales agent for more information.



2.3 Confirm that you want to reset the security token.

Reset My Security Token

When you access Salesforce from an IP address that isn't trusted for your company, and you use a desktop client or the API, you need a security token which is also reset.



[Reset Security Token](#)

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

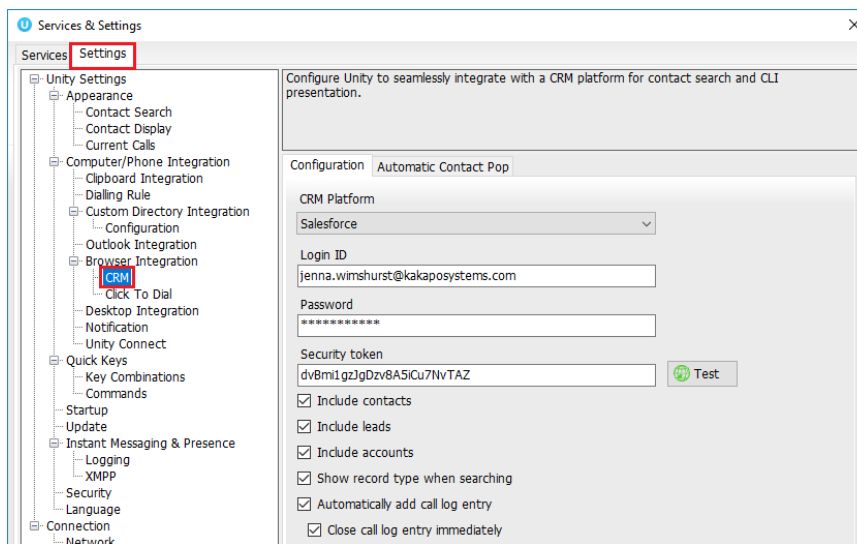
We've sent you a new Salesforce security token because you recently changed your password or requested to reset your security token. Use this updated security token with API or desktop clients that require it.

Username: hris.tutt@unityclient.com

Security token (case-sensitive): [LQJbegcygDFSuVGs56nNgkcBl2](#)

For more information on using your security token, see Reset Your Security Token at https://help.salesforce.com/HTViewHelpDoc?id=user_security_token.htm.

2.5 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.

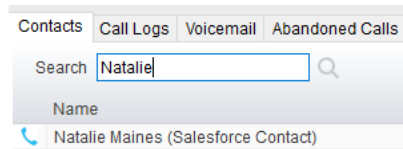


You can also choose whether to include contacts, leads and/or accounts from Salesforce, in most cases all three would be selected.

Unity can also include the record type when showing a contact from Salesforce, making it 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.

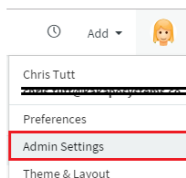
2.6 Click on the Automatic Contact Pop tab to configure these parameters, then click Save. You will be able to test the integration by performing a search for a contact within Unity, you should see Salesforce records appear in the list as well as from all other directories. If in doubt you may want to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



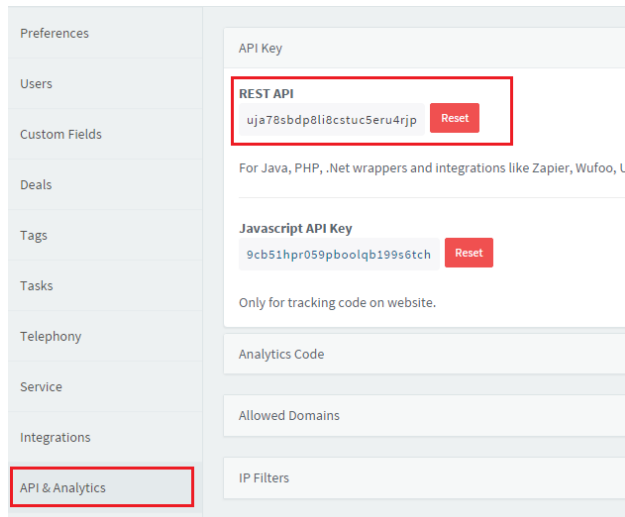
3 CONFIGURING AGILE CRM INTEGRATION

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.

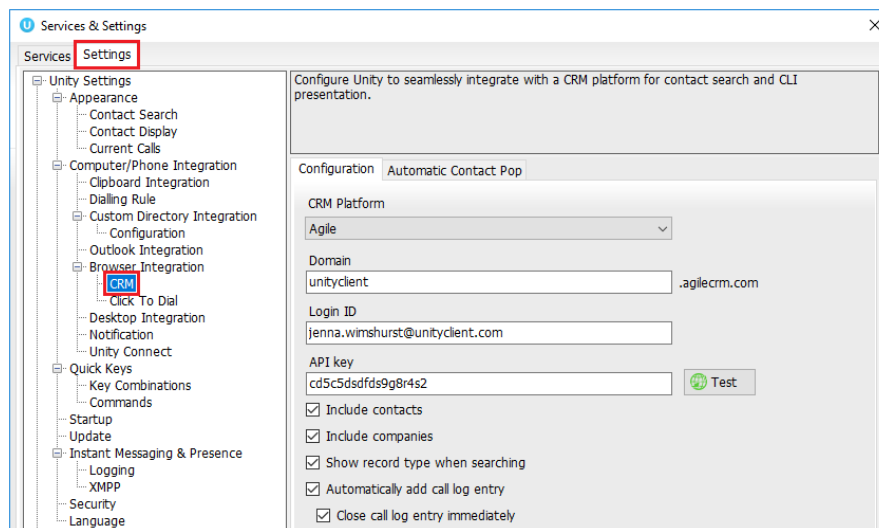
3.1 Log into Agile CRM and click on “Admin Settings” under the account button in the top-right corner.



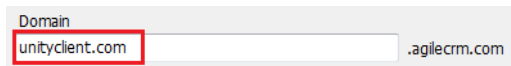
3.2 Click on “API & Analytics” from the menu on the left, then copy the REST API field from the webpage, as shown below. Please be sure to capture all text, it may be helpful to paste to Notepad to ensure you have all characters [without formatting] before pasting into Unity.



3.3 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.



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:

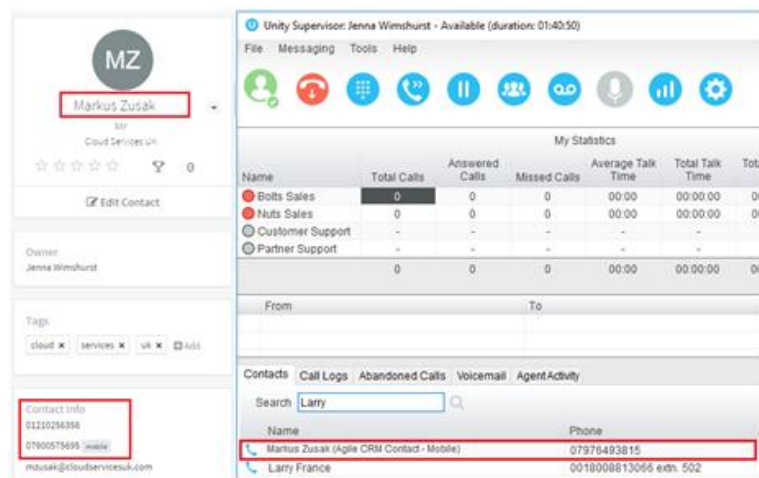


Instead the domain should be:



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.

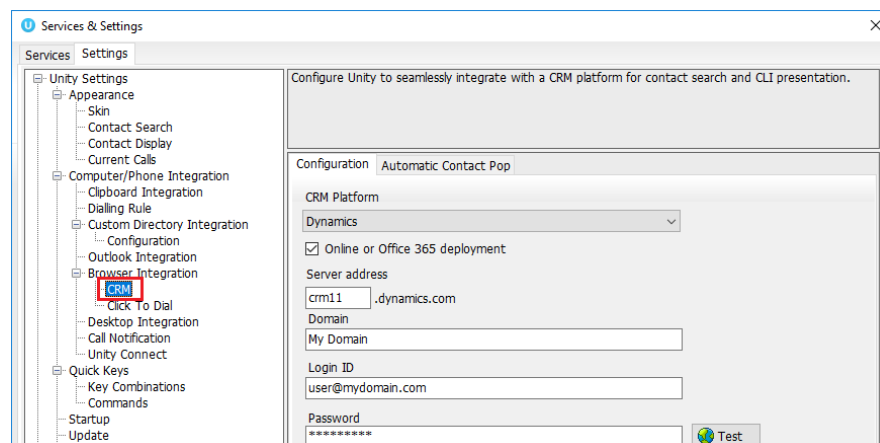


4 CONFIGURING MS DYNAMICS INTEGRATION

4.1 INTEGRATING MS DYNAMICS

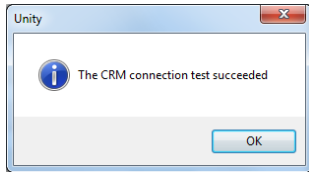
To integrate your MS Dynamics into Unity go to Settings>CRM then select Dynamics from the drop down menu.

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



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.

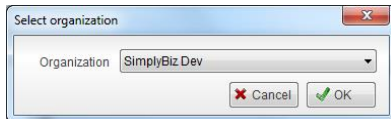


4.2 ONLINE AND OFFICE 365 DEPLOYMENT

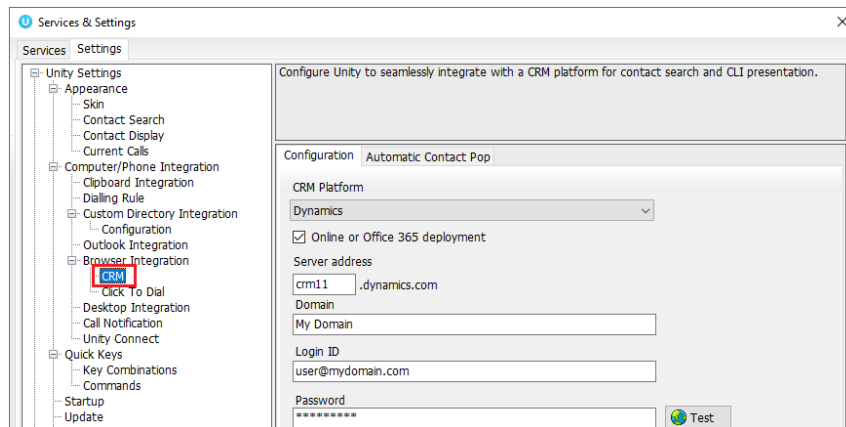
If you have selected an Online or Office 365 Deployment, then the below pop up may appear.



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.

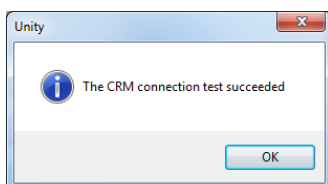


4.3 LOGIN ID AND PASSWORD

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.

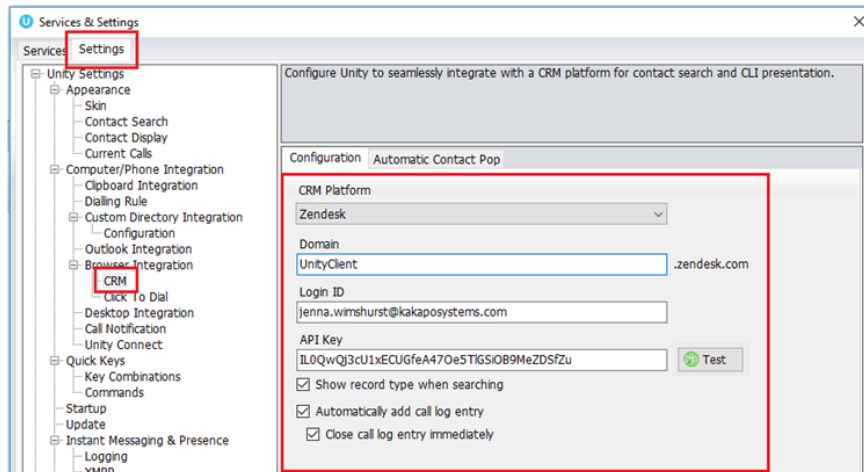
Once the CRM connection test has been successful click Ok.



5 CONFIGURING ZENDESK INTEGRATION

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

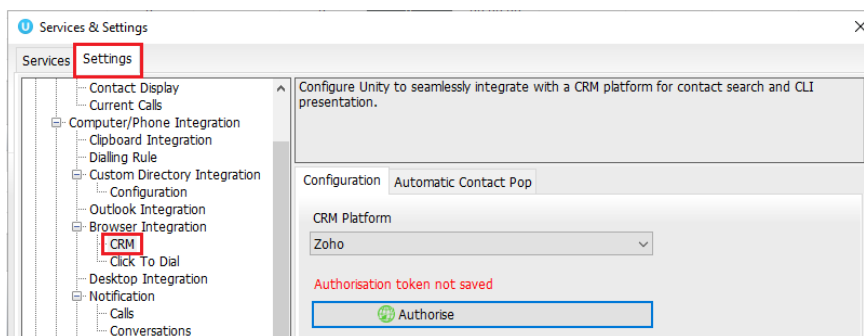


Click the test button to save and test the log in details.

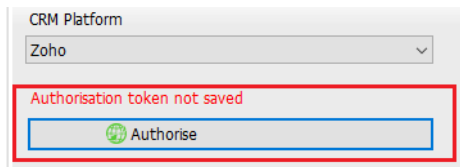
Once the CRM connection test has been successful click Ok.

6 CONFIGURING ZOHO CRM INTEGRATION

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



Click Authorise:

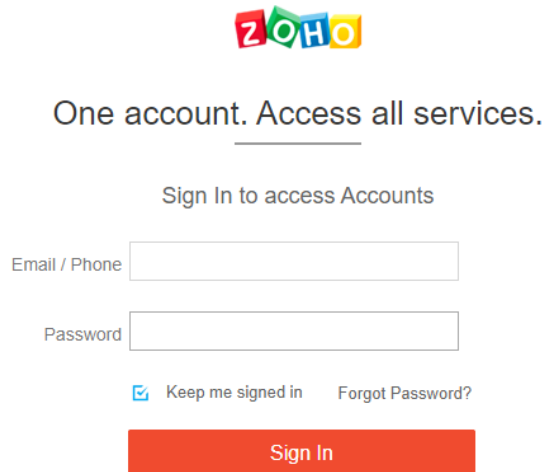


CRM Platform
Zoho

Authorisation token not saved

Authorise

Your default browser will then pop Zoho.com and ask you to enter your account login details:



ZOHO

One account. Access all services.

Sign In to access Accounts

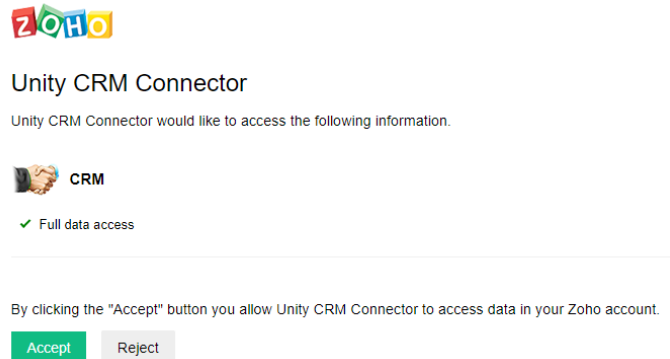
Email / Phone

Password

Keep me signed in [Forgot Password?](#)

Sign In


Once you've signed into Zoho, it will ask you to accept the access request from Unity:



ZOHO

Unity CRM Connector

Unity CRM Connector would like to access the following information.

 CRM

Full data access

By clicking the "Accept" button you allow Unity CRM Connector to access data in your Zoho account.

Accept Reject

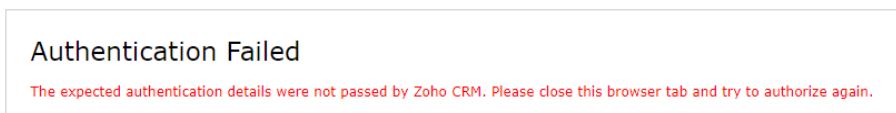
Click Accept. You will then be informed whether the authentication have been successful or not. If it has been successful, you will see this screen:



Authentication Succeeded

Zoho CRM authentication is complete, please close this browser tab. You must restart Unity in order to retrieve the authentication details used to integrate with Zoho CRM

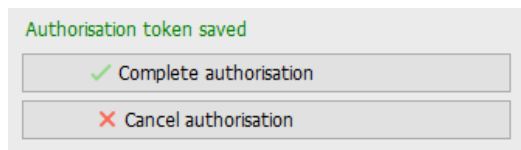
If you clicked "Reject" or the authentication failed, you will see this screen and will need to go through the process again:



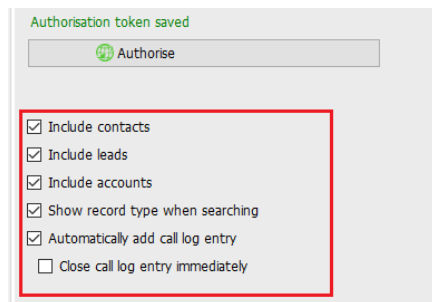
Authentication Failed

The expected authentication details were not passed by Zoho CRM. Please close this browser tab and try to authorize again.

Once the authentication has been successful, go back to the Unity client and click Complete Authorisation:



Once saved you can also choose whether to include contacts, leads and/or accounts from Zoho, by selecting the boxes:

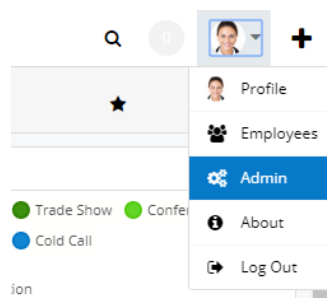


Click Save and then restart Unity.

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).

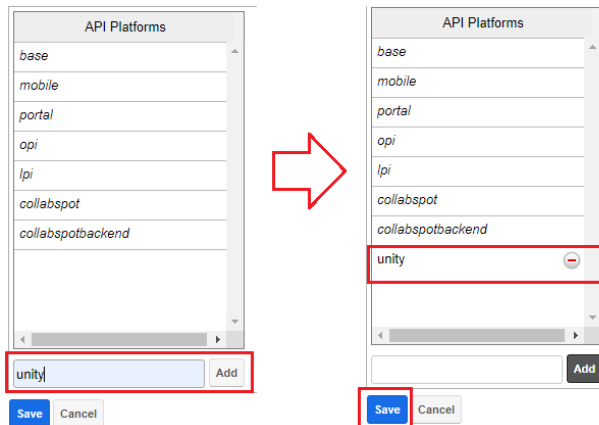
When logged in as an administrator, click Admin from the context menu. If you don't see this menu option then you are not logged in as an administrator.



Under Developer Tools, click Configure API Platforms

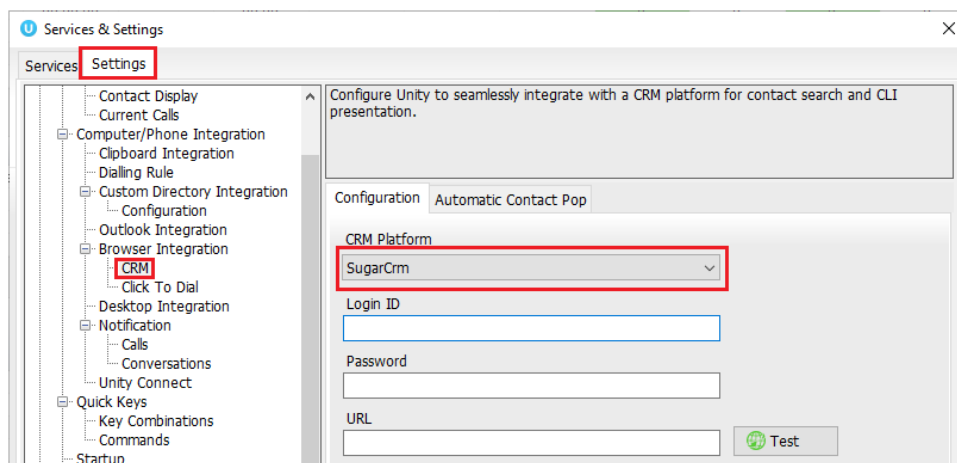
| | |
|---|--|
| Rename Modules | Change the names of the modules appearing within the application |
| Display Modules and Subpanels | Choose which modules are displayed in the navigation bar and which subpanels are displayed system-wide |
| Configure Navigation Bar Quick Create | Select which modules 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



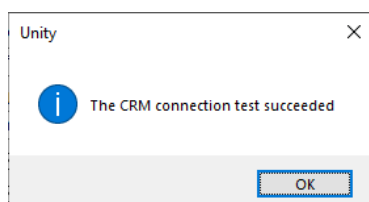
Click Add to add the API to the list, then click Save to update.

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

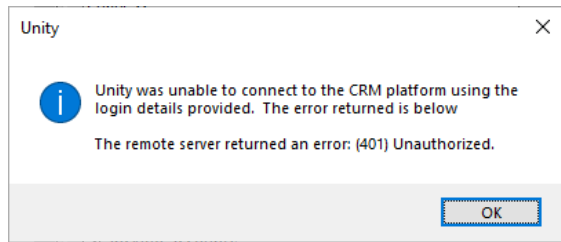


Enter your login ID, password and URL. The URL will be the same that is used to log into the Sugar CRM portal, it must start with https://

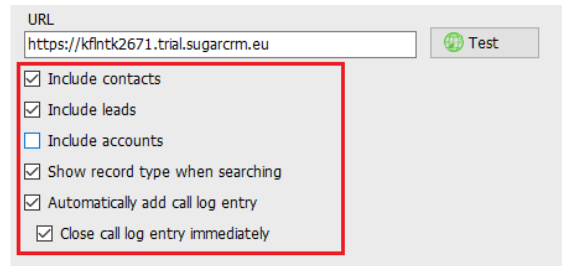
Click Test. If the details are correct then you will see the below pop up:



If the details are incorrect then you will see this pop up and will need to enter the correct details to integrate Sugar CRM:



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 below:



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

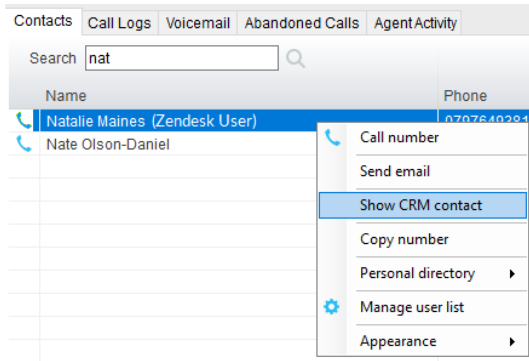
If the account doesn't have access to search contacts, leads or accounts (depending on the license type of the user in Sugar CRM) then Unity will automatically uncheck the related setting to ensure it doesn't continue to search for that entity type.

8 UNITY CRM FUNCTIONALITY

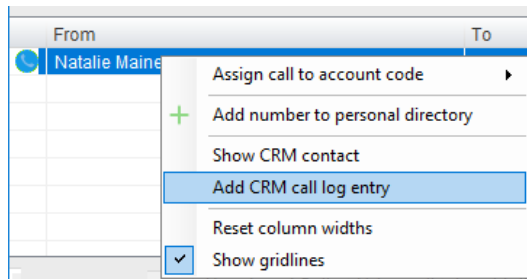
8.1 CONTACT POP

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

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 below.



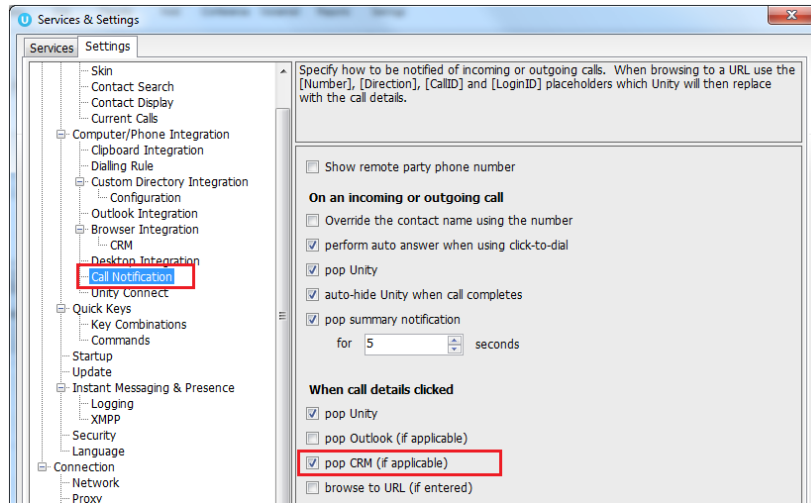
You can also right-click a call to pop the record in the CRM using the default browser, as shown below. This assumes the contact was found in the CRM platform rather than another directory (for example an Outlook contacts folder).



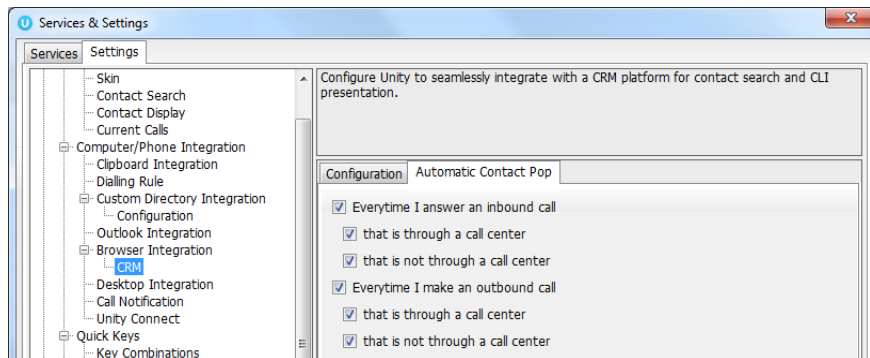
You can also click on the call details “toast” notification popup to pop the contact, as below. Again this assumes the contact was found in the CRM platform.



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

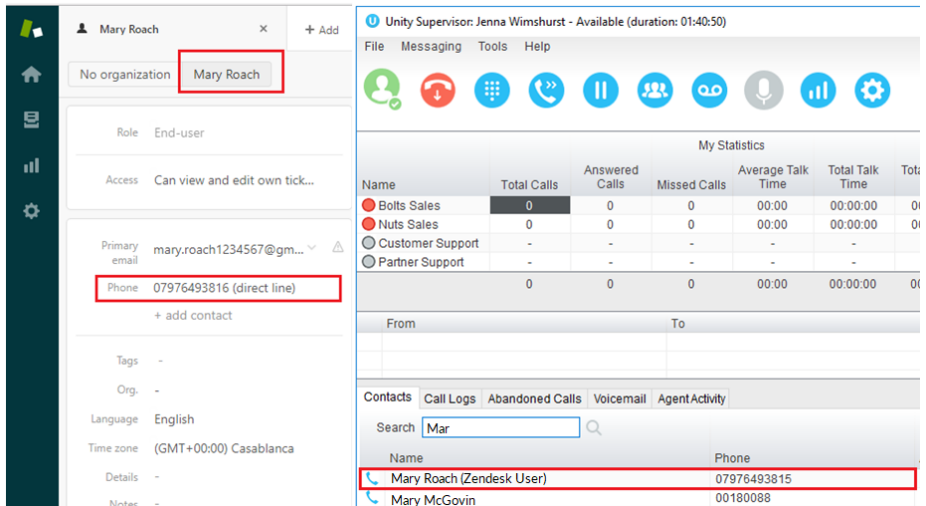


Unity can also be configured to automatically pop the CRM contact when the call is answered, which depends on the Automatic Contact Pop tab settings as shown below.

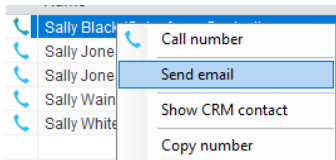


8.2 CONTACT SEARCH

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.



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

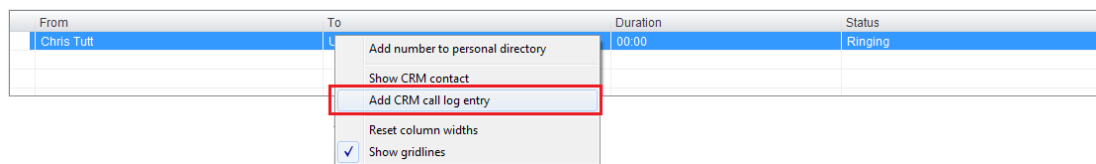


8.3 CALL LOG ENTRY

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

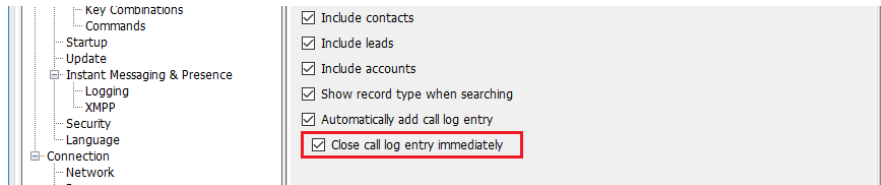
8.3.1 MANUAL CALL LOG ENTRY

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

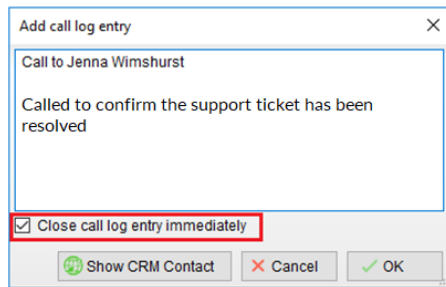


Unity will enter basic details of the call depending on if the call is inbound or outbound, as shown below. Remember this call log will be stored in the CRM so an outbound call in Unity is an inbound call in the CRM, because we have called the contact.

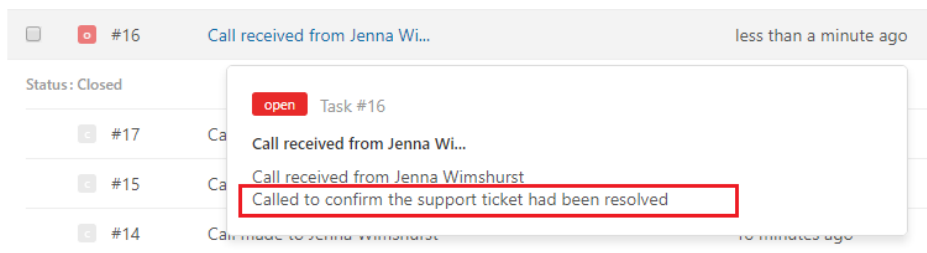
The call note will be saved against that contact in the CRM platform, please note that you can specify whether to close the status of the call log entry in the CRM platform or keep it open by ticking the box.



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.

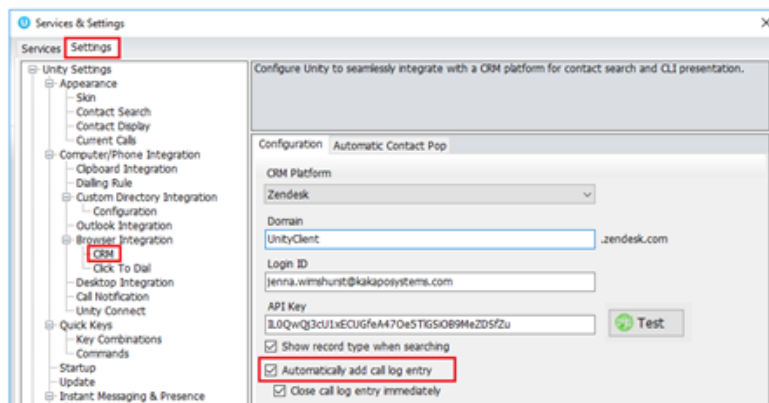


You will now see this call log entry in the CRM, as shown below.



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.



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.

The screenshot shows a Salesforce 'Task' record titled 'Call'. The 'Task Information' section contains the following details:

| | |
|-------------|--------------------------------------|
| Subject | Call |
| Assigned To | Chris Tutt |
| Name | Toby Southfield |
| Comments | Call made to Chris Tutt (Unanswered) |

The 'Comments' field is highlighted with a red border. Action buttons include 'Edit', 'Delete', 'Create Follow-Up Task', and 'Create Follow-Up Event'. A date range filter shows '1 7 31'.

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

The screenshot shows a Salesforce 'Task' record titled 'Call' within a navigation menu (Home, Contacts, Accounts, Leads, Opportunities, Reports, Dashboards, Chatter, Files, Products, Forecasts, +). The 'Task Information' section contains the following details:

| | |
|-------------|-------------------------------|
| Subject | Call |
| Assigned To | Chris Tutt |
| Name | Toby Southfield |
| Comments | Call received from Chris Tutt |

The 'Additional Information' section shows:

| | |
|----------|-----------|
| Priority | Normal |
| Status | Completed |

The 'System Information' section shows:

| | |
|------------|------------------------------|
| Created By | Chris Tutt, 29/09/2016 18:44 |
|------------|------------------------------|

Action buttons include 'Edit', 'Delete', 'Create Follow-Up Task', and 'Create Follow-Up Event'. A date range filter shows '1 7 31'.