

UNITY AGILE CRM INTEGRATION

Collate Your Contacts With Unity & Agile CRM

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



Agile CRM Integration Unity Application Suite

Unity completely unifies all customer contact, including calls, emails and web chats at a user level within Agile CRM.



Click-to-Dial



Contact Lookup



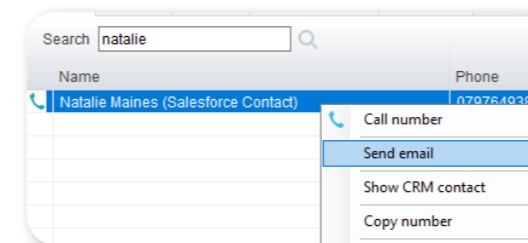
Queue Profiling



Journaling



Call Popping



Contact Search

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



Automatic Call Pop

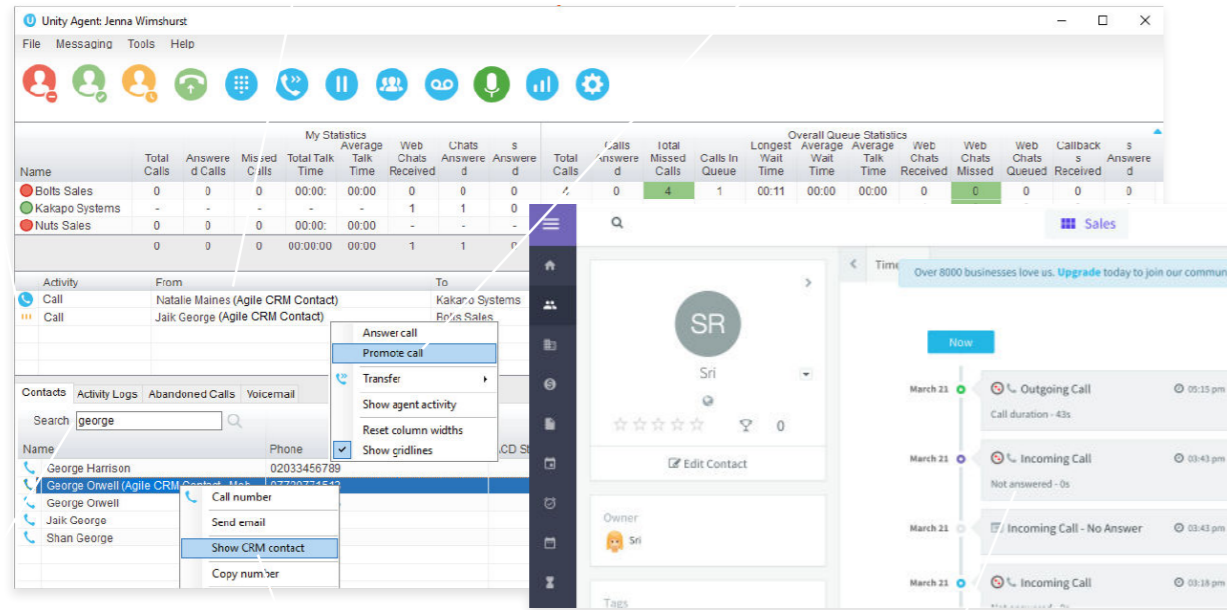
The user can easily view the contact in the Agile CRM and Unity can also be configured to automatically pop the CRM on answer.

AGILE CRM INTEGRATION

Identify incoming Agile calls

Auto pop Agile contact on answer

Prioritize Agile contacts in queue



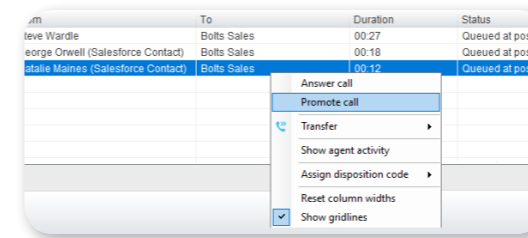
Search Agile within Unity

Open Agile contact

Automatic call logging

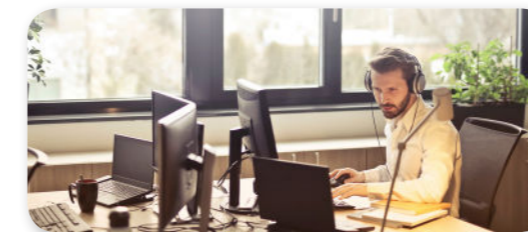
Do it once and get it right first time. Unity's Agile CRM integration completely unifies all customer contact, including calls, emails, chats and tweets at a user level within Agile CRM

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



Prioritizing Queued Calls

- o Prioritize Contacts in Queue
- o Transfer Agile CRM Users to VIP Queue
- o Intelligently manage Important Calls



Click To Dial

- o Click To Dial From Within Agile CRM
- o Turn Web Chats Into Calls Instantly
- o Flexibility For Ad-hoc Dialling

Add call log entry

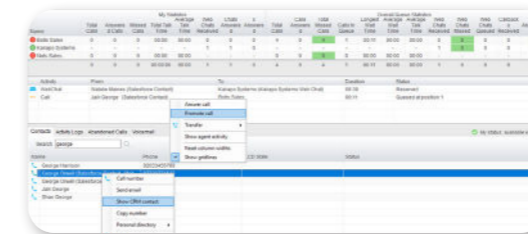
Call to Jenna Wimshurst

Called to confirm the support ticket has resolved



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 Agile CRM.



Multi-Channel Integration

- o Web Chat & Email Profiling
- o View Previous CC Conversations
- o Screen Popping On All Media



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.



Automatic Call Journaling

- o Log All Calls & Web Chats & Emails
- o Manually Edit Automatic Log Entries
- o View Full Transcripts in Agile CRM