MASERGY

Sugar CRM Integration
Unity Application Suite

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

UNITY SUGAR CRM INTEGRATION
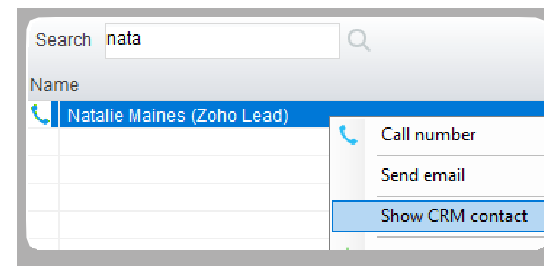
Collate Your Contacts With Unity & Sugar CRM

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

sugarcrm

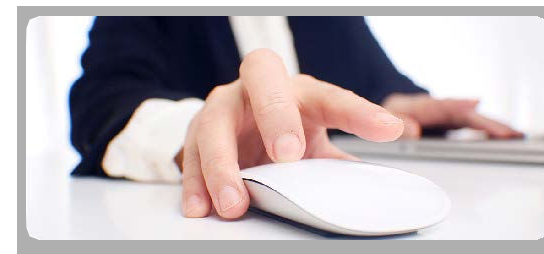| Click-to-Dial	Contact Lookup	Queue Profiling	Journaling	Call Popping

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

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

Unity Sugar CRM Integration   www.masergy.com

SUGAR CRM INTEGRATION

Identify incoming
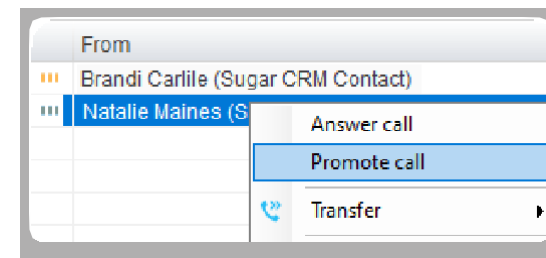Sugar calls

Auto pop Sugar contact
on answer

Prioritize Sugar leads
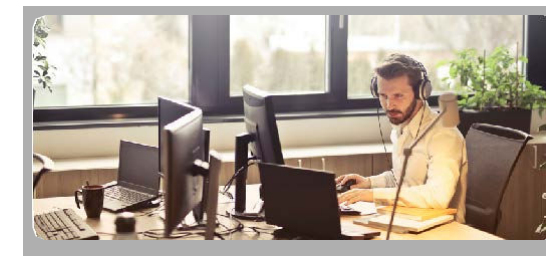in queue

Search Sugar
within Unity

Open Sugar contact

Do it once and get it right first time. Unity's Sugar integration completely unifies all customer contact, including calls, emails, chats and tweets at a user level within Sugar.
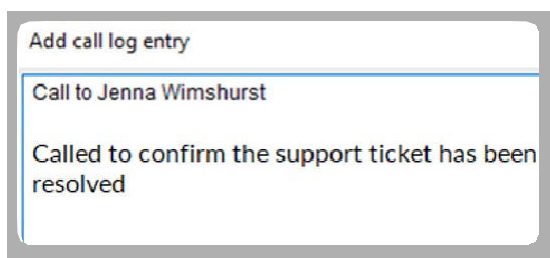
All calls are journaled within Sugar, including the direction of the call, with the option to edit the task log and leave the call log open or closed. Sugar can be polled directly from Unity Search, combining all Outlook, group, personal and Sugar contact numbers in one place.
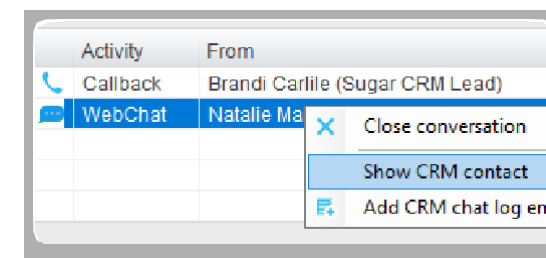

Prioritizing Queued Calls
o Prioritize Contacts and Leads
o Transfer Sugar Users to VIP Queue
o Intelligently manage Important Calls

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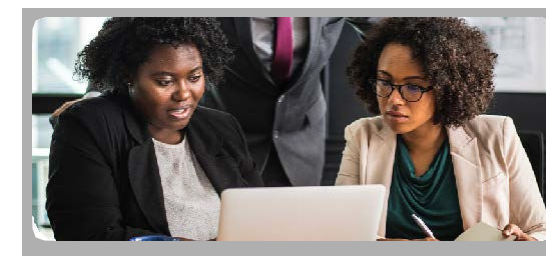o Turn Web Chats Into Calls Instantly
o Flexibility For Ad-hoc Dialling

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 Sugar.

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 Sugar

Unity Sugar CRM Integration