**MASERGY**

# UNITY ZOHO CRM INTEGRATION

*Collate Your Contacts With Unity & 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.

**ZOHO**

## Zoho CRM Integration
## Unity Application Suite

Unity completely unifies all customer contact, including calls, emails and web chats at a user level within Zoho.
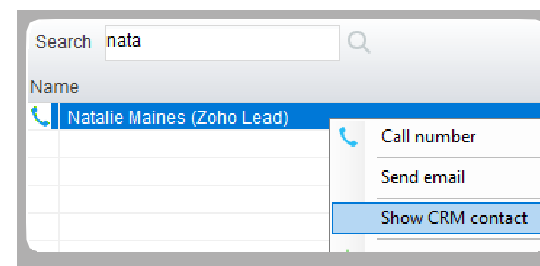
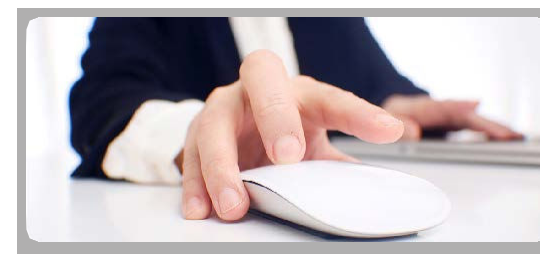| Click-to-Dial | Contact Lookup | Queue Profiling | Journaling | Call Popping |

### Contact Search
Perform a contact search and Unity will not only check all directories, but it will also dynamically search your Zoho contacts.
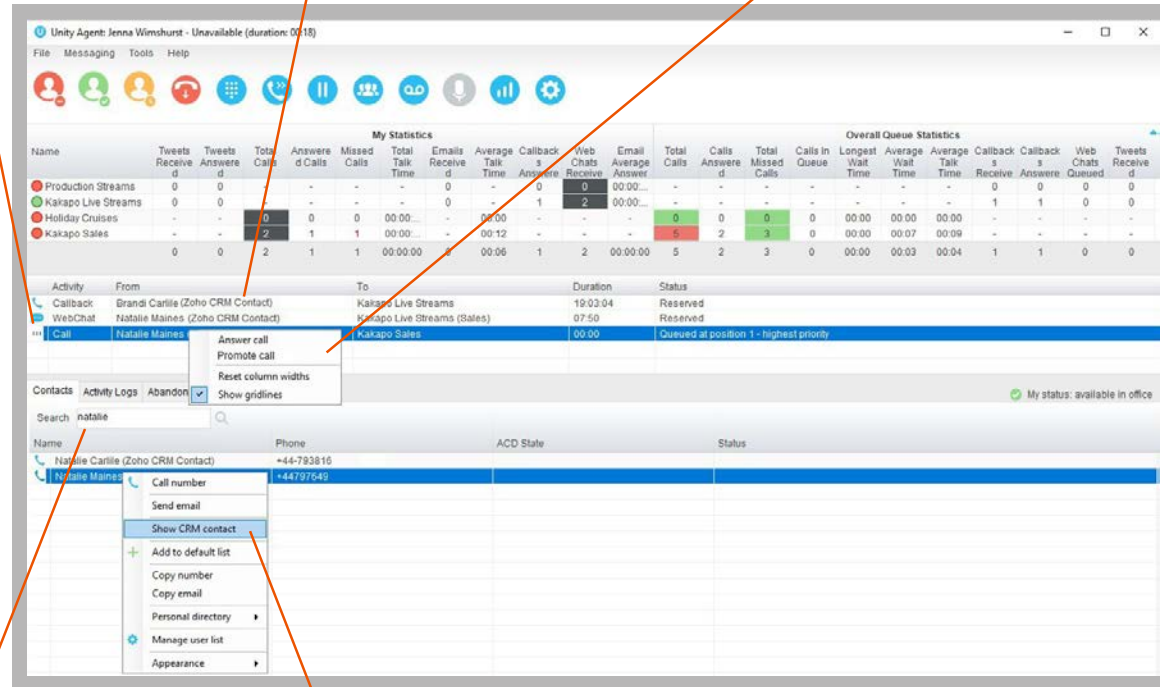
### Automatic Call Pop
The user can easily view the contact in the Zoho and Unity can also be configured to automatically pop the CRM on answer.

Unity Zoho CRM Integration                    www.masergy.com

# ZOHO CRM INTEGRATION

Identify incoming
Zoho calls

Auto pop Zoho contact
on answer

Prioritize Zoho leads
in queue



Search Zoho
within Unity

Open Zoho contact

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.
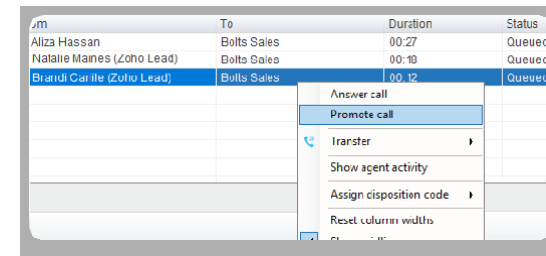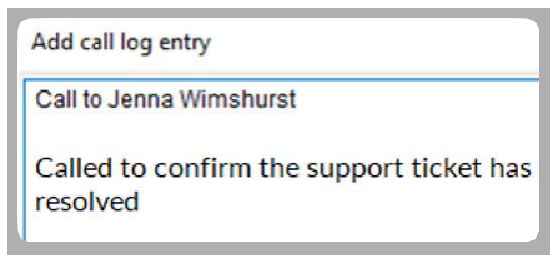


## Prioritizing Queued Calls
o Prioritize Contacts and Leads
o Transfer Zoho Users to VIP Queue
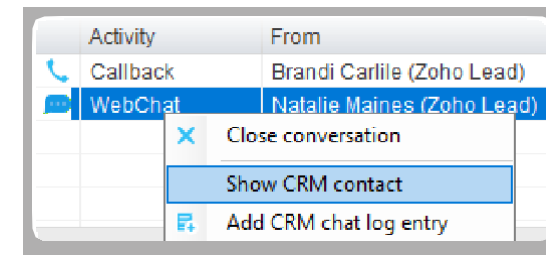o Intelligently manage Important Calls
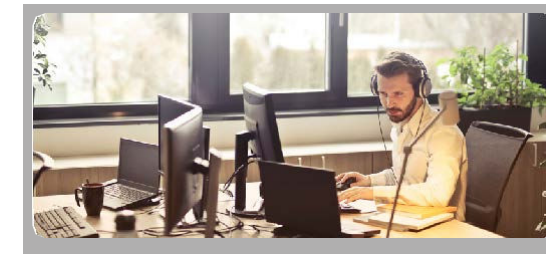


## Click To Dial
o Click To Dial From Within Zoho
o Turn Web Chats Into Calls Instantly
o Flexibility For Ad-hoc Dialling



## 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 Zoho.
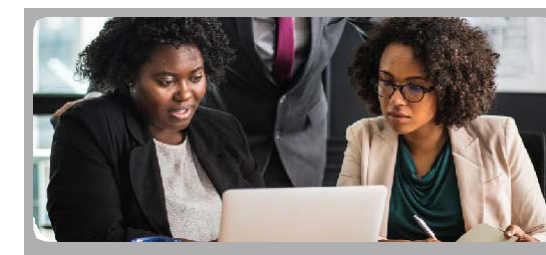


## Multi-Channel Integration
o Web Chat & Email Profiling
o View Previous CC Conversations
o Screen Popping On All Media



## 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 Zoho