

## **Unity: Agile CRM Integration**

### TRANSFORM THE WAY YOU CONNECT WITH AGILE CRM

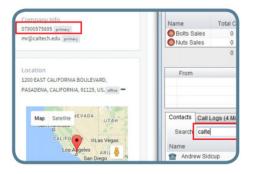
Unity CRM Connect will pop the record in Agile CRM, either automatically or when the user clicks the call notific tion. Outbound calls can be made from within Agile CRM

Unity seamlessly integrates with Agile 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.

Markus Zusak	Timeline Not	Chris Tutt - Availa ing Tools He			Conference Voic
Cloud Services UK ☆☆☆☆☆ 🏆 0				My Statistics	
0 0 0 0 0 <b>* •</b>	Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time
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	Nuts Sales	0	0	0	00:00:00
Dwner		0	0	0	00:00:00
Jenna Wimshurst	From			То	
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	Search zu		٩		
Contact Info	Name			Phone	Departme
1210256358	Markus Zusak (Agile CRM Contact - Mobile) Markus Zusak (Agile CRM Contact)			0790057569 0121025635	
17900575695 mobile					

#### **Contact Search**

When you perform a contact search, not only will Unity check all directories such as the group/ enterprise phone list, personal directory and Outlook etc, but it will also dynamically search your Agile CRM contacts.



#### Automatic Call Pop

Right-click a call to pop the record in Agile CRM using the default browser. Unity can also be configu ed to automatically pop the CRM contact when the call is answered.

# ght (Agile CRM Contact) gl Call number gl Show CRM contact Copy number

#### Add Call Log Entry

Automatically add a call log entry for any calls within Unity. Users can then add further notes, manually which will then be stored in Agile CRM.

