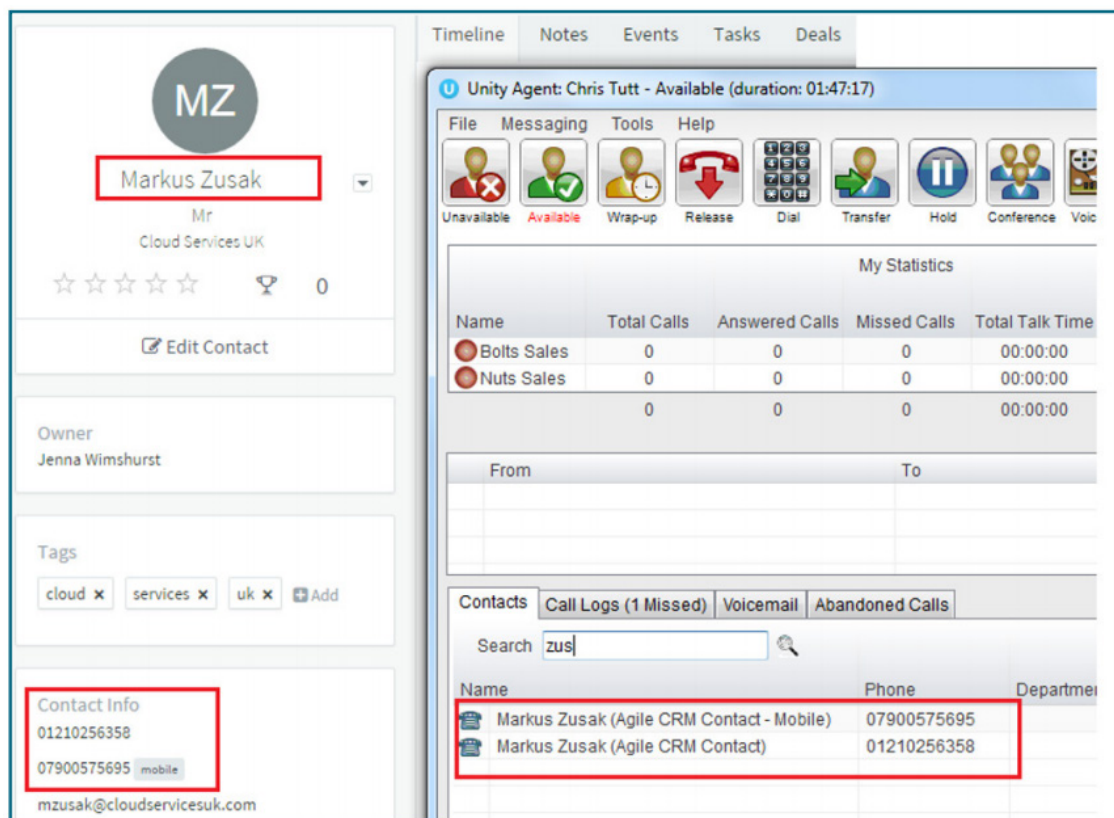


Unity: Agile CRM Integration

TRANSFORM THE WAY YOU CONNECT WITH AGILE CRM

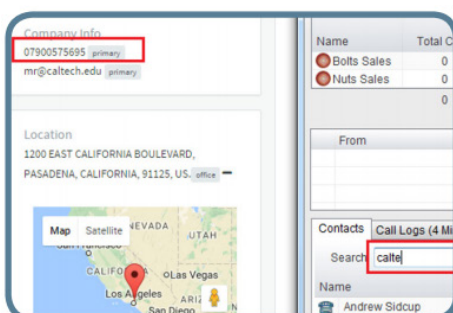
Unity CRM Connect will pop the record in Agile CRM, either automatically or when the user clicks the call notification. Outbound calls can be made from within Agile CRM

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.



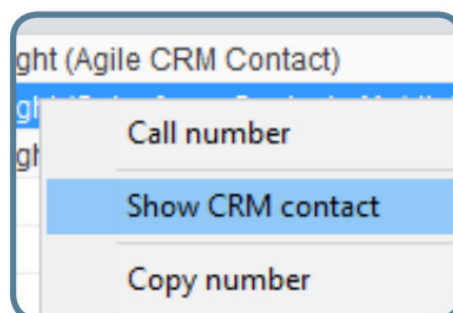
Contact Search

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 configured to automatically pop the CRM contact when the call is answered.



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.

