

Unity's Salesforce Integration Workflow

Step 1: Taking a call

When a Salesforce contact or lead calls into a call center the supervisor will be able to recognize that, they are a contact or lead as the information will be in brackets after the name.

From	To	Duration	Status
Sally Wainwright (Salesforce Lead)	Nuts Sales	00:10	Queued at position 1

The user will then be able to right click on the call to promote it to another queue or contact. Once the call has been answered, Unity will pop the Salesforce contact page in the user's default browser.

Step 2: Adding a note

By default Unity will add an automatic call entry in Salesforce detailing the time and date and who called who. User can also add a manual call log entry by simply right clicking on the call and selecting "add a call log entry" as shown below.

From	To	Duration	Status
Sally Wainwright (Salesforce Lead)	Jenna Wimbhurst		Active/Not recording

Assign call to account code Add number to personal directory Show CRM contact Add CRM call log entry Reset column widths Show gridlines

Unity allows the user to specify whether to close the call log entry box when the call ends or to keep it open to add information after.

☒ Close call log entry immediately

Step 3: Saving the call log

As soon as the call/call log entry box is complete, Unity will save the manual call log entry against the contact in Salesforce along with basic call information. You will now see this call log entry in Salesforce.com, as shown below.

Task Call

Click to add topics: ?

Task Detail

▼ Task Information

Subject

Assigned To

Name

Comments

Call

Jenna Wimbhurst

Sally Wainwright - kakapo Systems

Call made to Jenna Wimbhurst

Please watch the [Unity's Salesforce Integration Workflow](#) video on YouTube.

Note: Unity CRM Connector works with Salesforce Classic and Salesforce Lightning User Interface (UI).