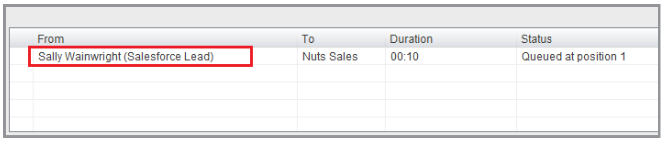
Unity’s Salesforce Integration Workflow

Step 1: Taking a call

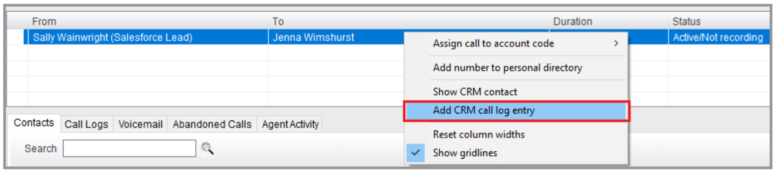
When a Salesforce contact or lead calls into a call center the supervisor will be able to recognize that, they are a contact or lead as the information will be in brackets after the name.



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

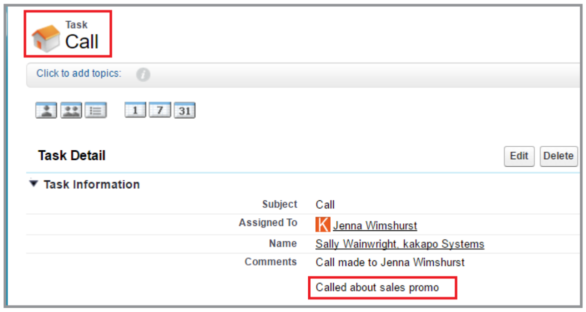
By default Unity will add an automatic call entry in Salesforce detailing the time and date and who called who. User can also add a manual call log entry by simply right clicking on the call and selecting “add a call log entry” as shown below.



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.

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.



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).

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