

UNITY SUGAR CRM INTEGRATION

Collate Your Contacts With Unity & Sugar CRM

Unity seamlessly integrates with Sugar 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 Sugar, either automatically or when the user clicks the call notification. Outbound calls can be made from within Sugar direct, or through Unity Contact Search.



Click-to-Dial



Contact Lookup



Queue Profiling



Journaling

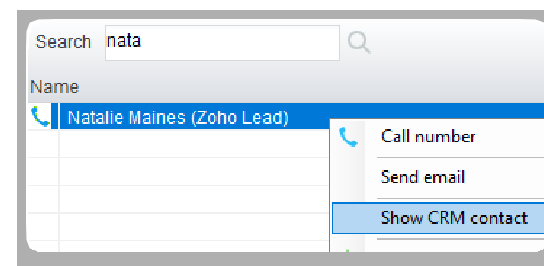


Call Popping



Sugar CRM Integration Unity Application Suite

Unity completely unifies all customer contact, including calls, emails and web chats at a user level within Sugar.



Contact Search

Perform a contact search and Unity will not only check all directories, but it will also dynamically search your Sugar contacts.



Automatic Call Pop

The user can easily view the contact in the Sugar and Unity can also be configured to automatically pop the CRM on answer.

SUGAR CRM INTEGRATION

Identify incoming Sugar calls

Auto pop Sugar contact on answer

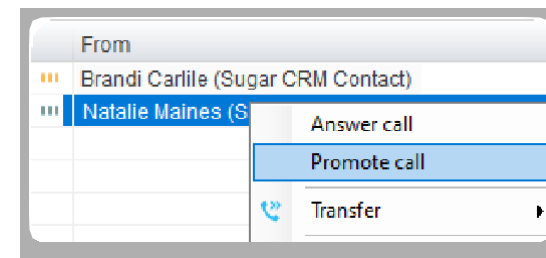
Prioritize Sugar leads in queue

Search Sugar within Unity

Open Sugar contact

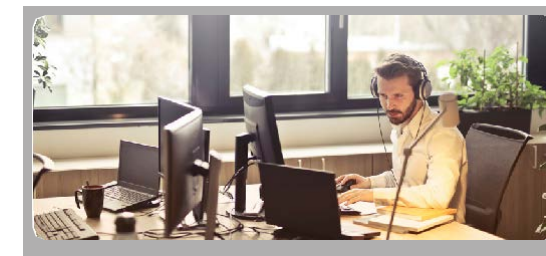
Do it once and get it right first time. Unity's Sugar integration completely unifies all customer contact, including calls, emails, chats and tweets at a user level within Sugar.

All calls are journaled within Sugar, including the direction of the call, with the option to edit the task log and leave the call log open or closed. Sugar can be polled directly from Unity Search, combining all Outlook, group, personal and Sugar contact numbers in one place.



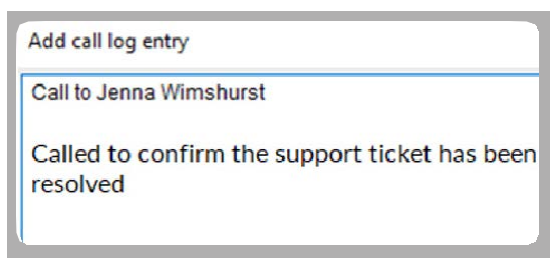
Prioritizing Queued Calls

- o Prioritize Contacts and Leads
- o Transfer Sugar Users to VIP Queue
- o Intelligently manage Important Calls



Click To Dial

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



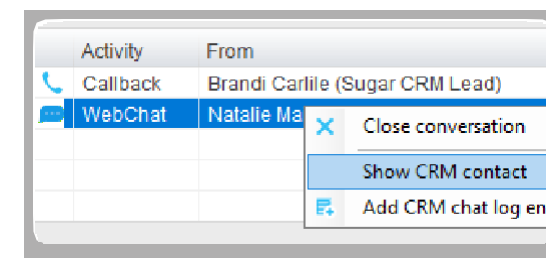
Add Call Log Entry

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 Sugar.



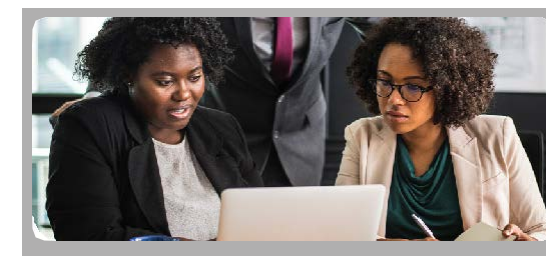
Presence

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.



Multi-Channel Integration

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



Automatic Call Journaling

- o Log All Calls & Web Chats & Emails
- o Manually Edit Automatic Log Entries
- o View Full Transcripts in Sugar