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Unity CRM Integrations – Agile CRM

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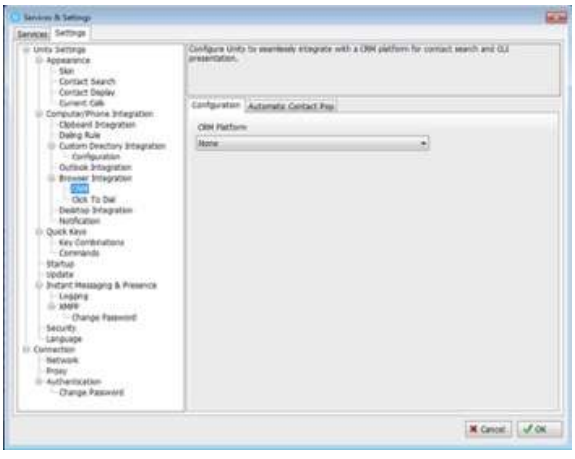
Unity integrates with Agile to enable contact lookup and “popping” for inbound and outbound calls, searching for CRM contacts in Unity, and click-to-dial from both Unity and Agile CRM.

Note: The CRM integration requires a license to be assigned to the user. This license is required in addition to the base license for Unity Desktop, Agent, or Supervisor.

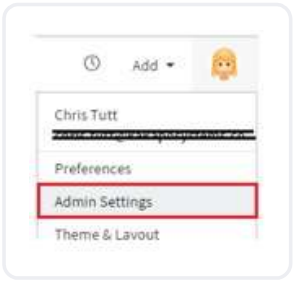
Once the CRM Integration license is assigned. Restart Unity. The CRM panel will become available in the Settings tab, as shown below.



Configuring Agile CRM

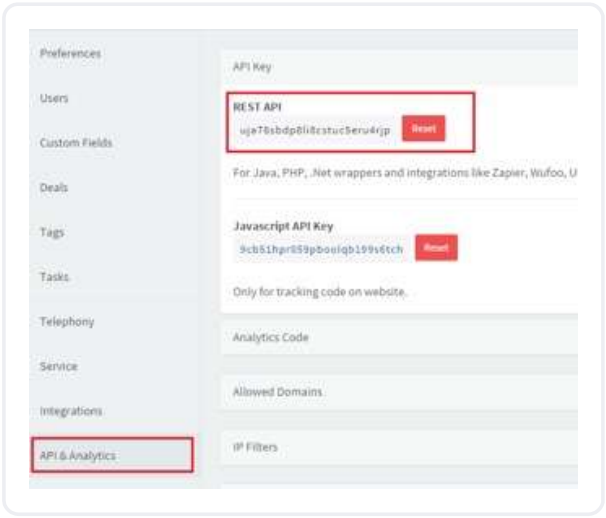
Agile CRM requires an API key. This can be obtained through the web portal. Follow these steps to configure Unity to integrate with the Agile CRM platform through your user account.

Log in to **Agile CRM** and select **Admin Settings** under the account button in the upper, right-hand corner.



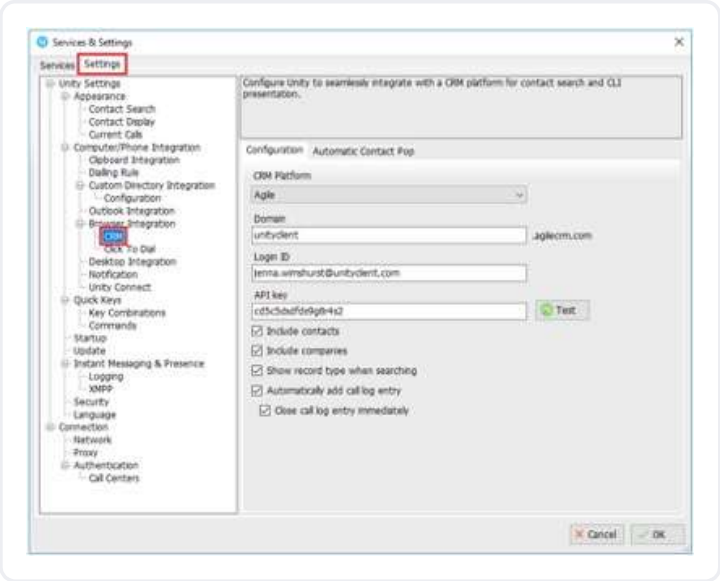
Select **API & Analytics** from the left-hand menu. Then, copy the **REST API** field.

Note: Make sure to capture all the text. It may be helpful to paste in Notepad to ensure you have all characters (without formatting) before pasting into Unity.



Next, open **Unity** and go to the **Settings** tab. Then select **CRM** in the left-hand navigation.

From the drop-down menu, select **Agile.** You will then be able to enter the **login ID** and **password** that you use when logging into Agile CRM, as well as the API key that you have copied from the webpage.

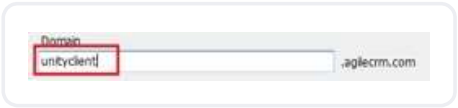


Select the **Test** button to save and test the login details.

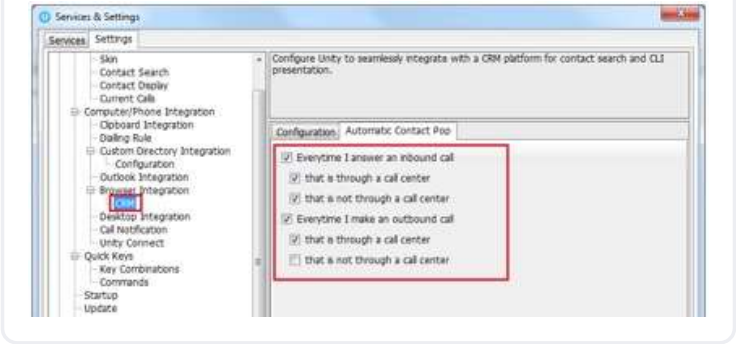
Note: Make sure the domain excludes any suffixes such as .com or .org. The domain must be appended with agilecrm.com.

For example, the below will fail:

Instead the domain should be:



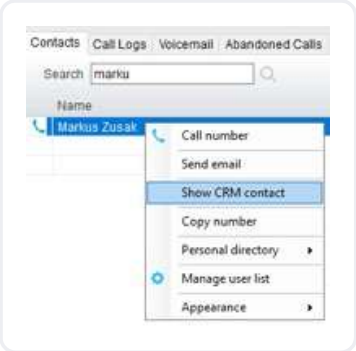
You can also configure Unity to automatically pop the CRM contact when the phone is answered by enabling the settings available on the **Automatic Contact Pop** tab.



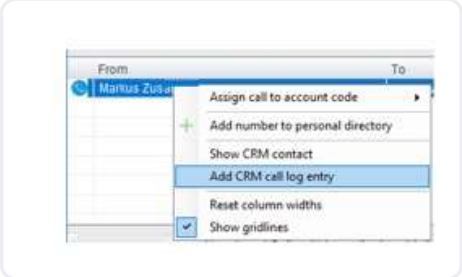
Contact Pop

Unity will use Agile CRM to identify inbound and outbound calls, including queued call center calls. “Popping” a contact means that at any time you can search for CRM contacts from Unity and perform click-to-dial to make an outbound call to the contact or display the contact in the CRM platform.

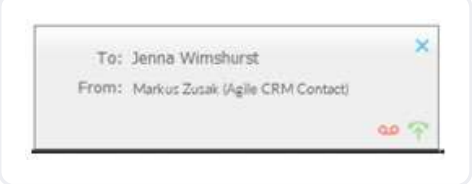
Note: If a number is attached to a contact in the directory and in the CRM platform, Unity will use the directory contact in the Active Call Window.



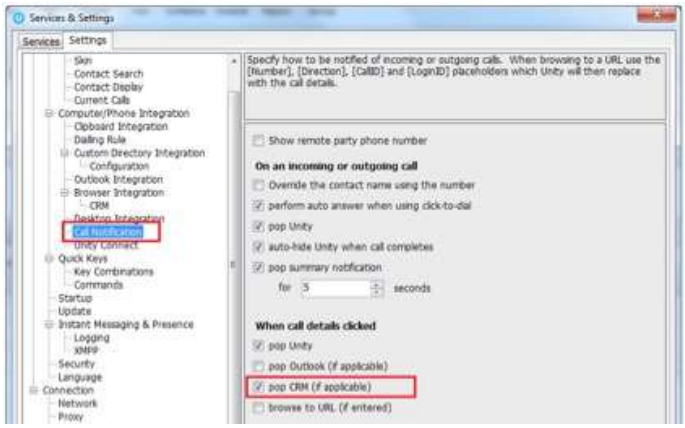
You can also right-click a call to pop the record in Agile CRM using the default browser. This assumes the contact was found in the CRM platform rather than another directory (e.g. an Outlook contacts folder).



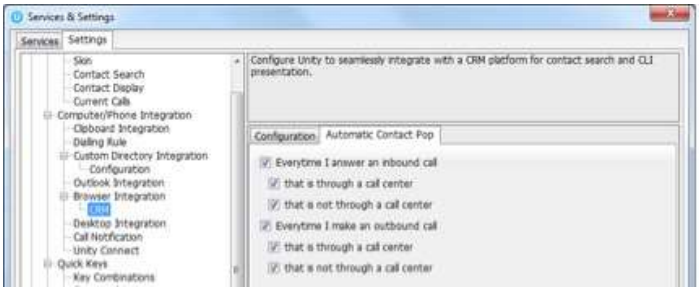
You can also click on the call details “toast” notification popup to pop the contact. This assumes the contact was found in the CRM platform.



1. To enable this feature, follow these steps:
    - Go to the **Settings** tab.
    - Select **Call Notification** in the left-hand navigation.
    - Then check the box next to **Pop CRM (if applicable).**

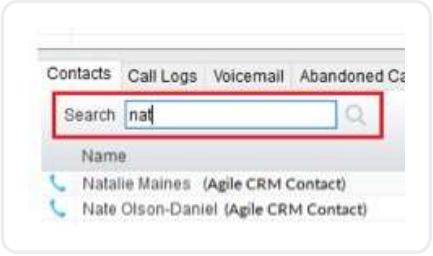


- Unity can also be configured to automatically pop the CRM contact when the call is answered. Enable this setting on the **Automatic Contact Pop** tab within the CRM settings window.



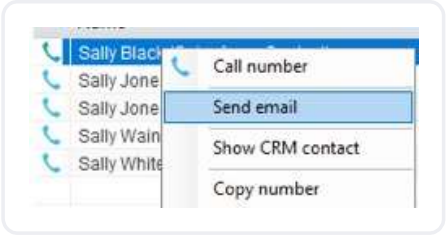
Contact Search

When you perform a contact search, Unity will check all directories (e.g. group and enterprise phone lists, personal directories, Outlook, etc.). It will also search Agile CRM. You can search by contact name or company name. Double click on the search result to call the number.



Note: Enter a minimum of three letters to search for a CRM contact.

To quickly send an email to a CRM contact, you can right click an entry and select **Send email**. This will open your default mail program.

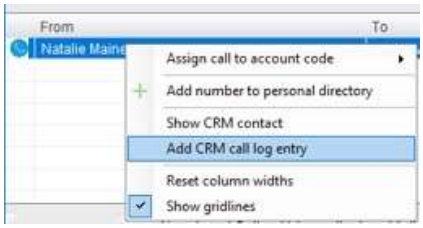


Call Log Entry

When integrated with Agile CRM, Unity can add call log entries.

1. Manual Call Log Entry

   Right click on a call and select **Add CRM call log entry**.

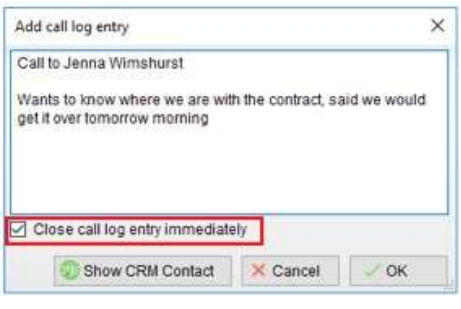


- Unity will enter basic details of the call depending on if the call is inbound or outbound.

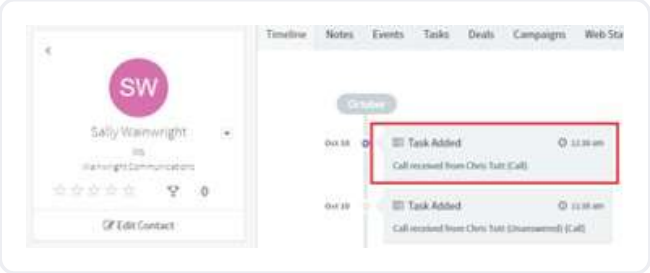
  Note: This call log will be stored in Agile CRM, so an outbound call in Unity is an inbound call in Agile CRM, because we have called the contact.

- Once the call log is created, you can manually enter notes. The call note will be saved against the contact in the CRM platform.

- You can specify whether to close the status of the call log entry in the CRM platform or keep it open by selecting the checkbox next to **Close call log entry immediately**. If you select Show CRM Contact or Cancel, the call log entry will not be saved.



- The call log entry will now appear in Agile CRM.



2. Automatic Call Log Entry

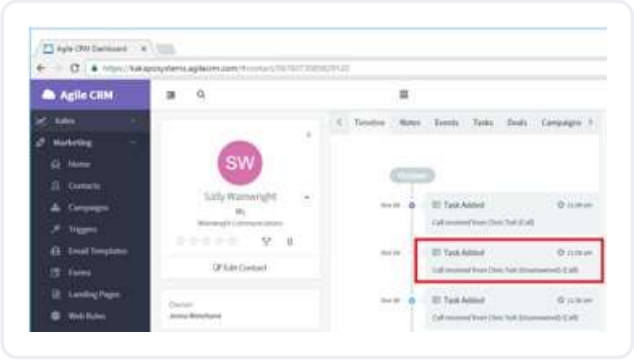
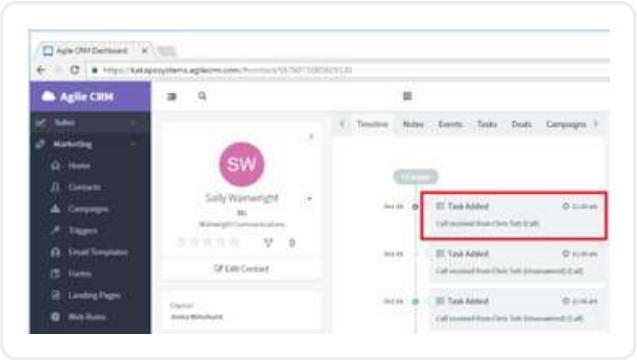
   Unity can be configured to automatically add a call log entry for any calls where a call log hasn't been manually created using the steps above.

3. To enable this feature, follow these steps:

   - Go to the **Settings** tab.
   - Select **CRM** in the left-hand navigation.
   - Then check the box next to **Automatically add call log entry.**

Unity will automatically add call log entries when the call is released (the same time it is removed from the Active Call List in Unity). Only basic information on the call is presented, based on the direction of the call and the Unity user that made or received the call. Agile CRM will timestamp the call internally.

An unanswered call from the Agile CRM contact to the Unity user will display like this:



An answered call from the Unity client to the Agile CRM contact will display like this: