

VOTACALL UNITY CRM INTEGRATION

ZENDESK

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I. OVERVIEW

Votacall Unity seamlessly integrates with Zendesk to facilitate contact lookup and “popping” for inbound and outbound calls, searching for CRM contacts within Votacall Unity and click to dial both from within Votacall Unity and Zendesk.

This functionality relies on a CRM Integration license being assigned to the user, as shown below. Please note this license is required in addition to the base license for Votacall Unity Desktop, Agent, Supervisor or Reception. However, this functionality is included in all trial licenses for these Votacall Unity clients.



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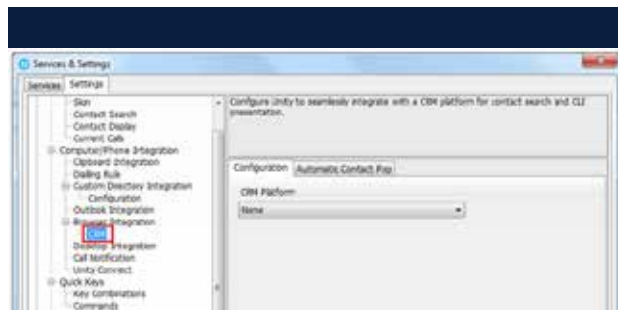
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If a CRM Connector license has not previously been assigned to the user, then a trial license will automatically be assigned the first time the CRM configuration settings are entered in Votacall Unity.



Exclude Inactive	License	Start Date	End Date
View	UnityAgent Enterprise	2014.06.24	Active License
View	UnityCRMIntegration Standard	2016.09.12	Active License
View	UnityDashboard Standard	2016.06.24	Active License
View	UnityDesktop Enterprise	2013.08.19	Active License

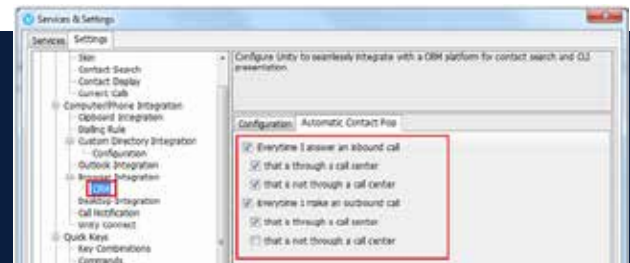
User
License
Utilization



Once this license is assigned and Votacall Unity is restarted, the CRM panel will become available in Settings (see image)

a) To configure Votacall Unity to integrate with a CRM platform, simply select the CRM platform from the dropdown list and complete the required fields.

b) You can also configure Votacall Unity to automatically pop the CRM contact when the phone is answered (see image).



2. CONFIGURING ZENDESK INTEGRATION

2.1 INTEGRATING ZENDESK

To integrate your Zendesk into Votacall Unity go to Settings>CRM then select Zendesk from the drop-down menu. Enter the domain, login ID (which is normally the email used to login) and the API Key.

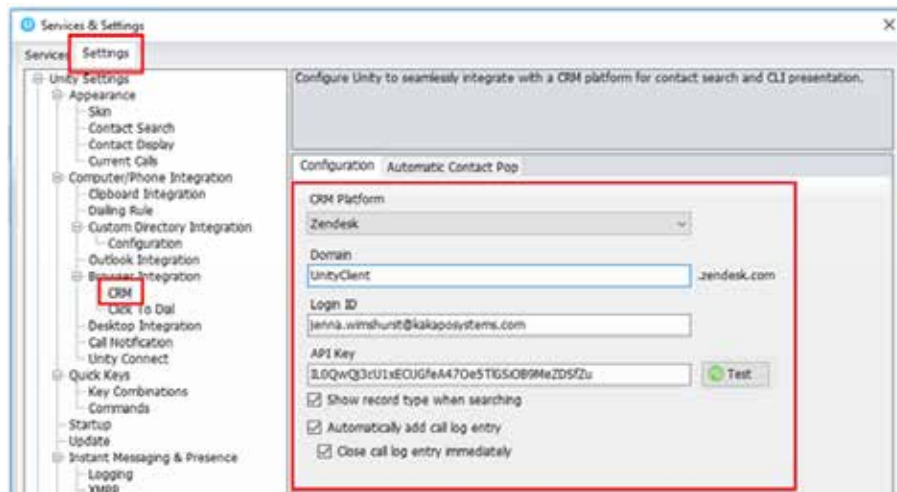


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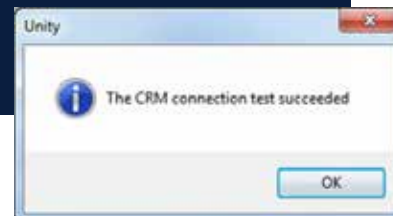
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Please note that you don't need to enter a password as the API Key is all you need to authenticate. Each user can have a separate API Key, or all users in a business can use the same one.



Click the test button to save and test the log in details

Once the CRM connection test has been successful click Ok.



3. VOTACALL UNITY CRM FUNCTIONALITY

3.1 CONTACT POP

Votacall Unity will use Zendesk to identify inbound and outbound calls, including queued call center calls.

Please note that if the same number is attached to a contact in the directory and in the CRM platform then Votacall Unity will find and use the directory contact in the Active Call Window.

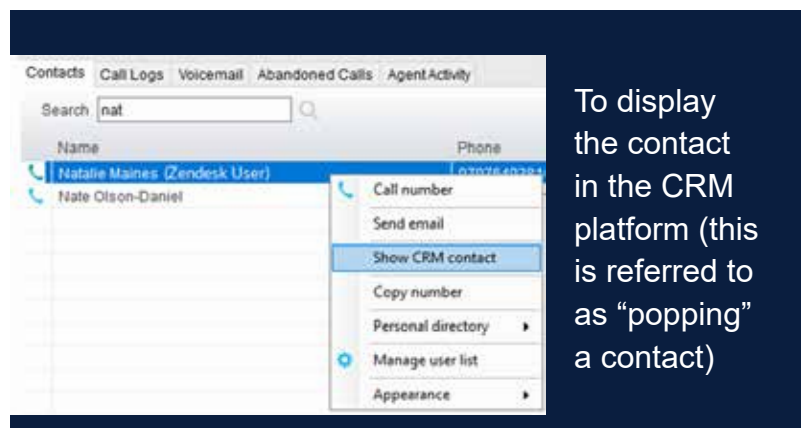


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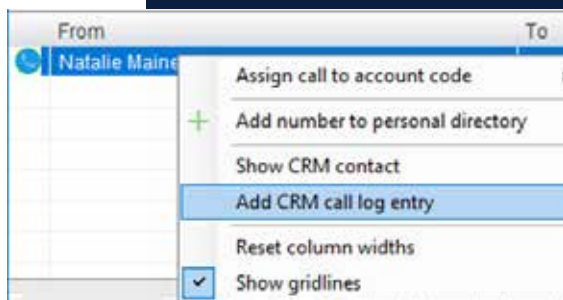
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You can search for CRM contacts within Votacall Unity to perform click to dial and make an outbound call.



To display the contact in the CRM platform (this is referred to as “popping” a contact)

You can also right-click a call to pop the record in Zendesk using the default browser, as shown here.



This assumes the contact was found in the CRM platform rather than another directory (for example an Outlook contacts folder).



You can also click on the call details “toast” notification popup to pop the contact.

Again, this assumes the contact was found in the CRM platform.

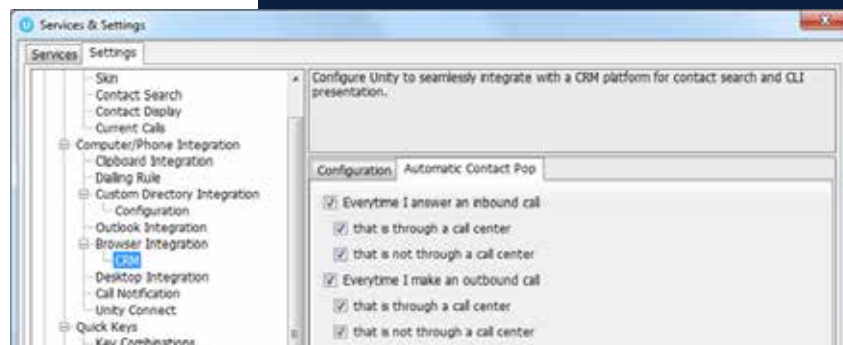
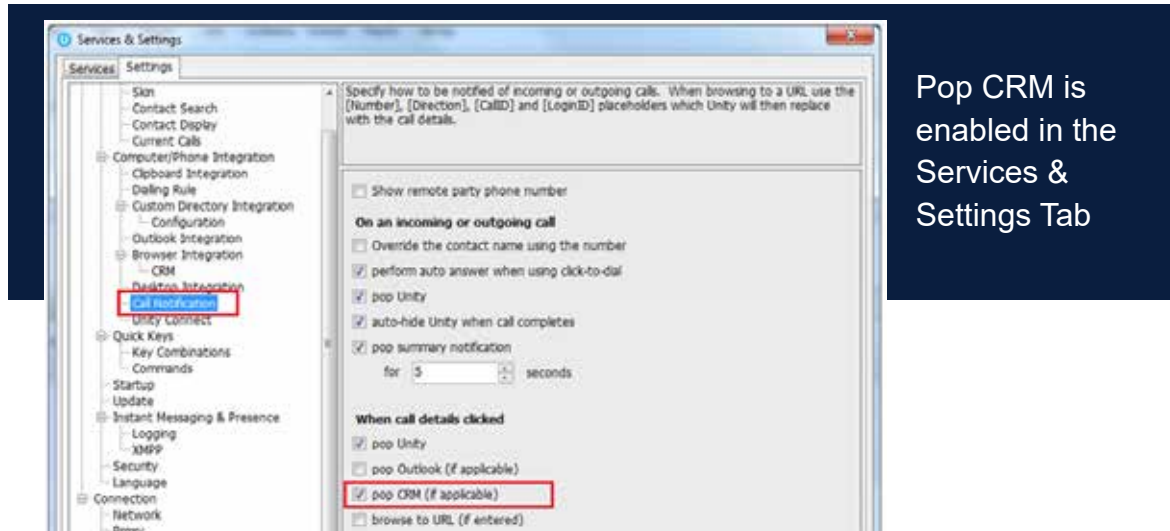


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Please note that the contact popping feature is dependent upon the appropriate Call Notification setting being marked active.



Votacall Unity can also be configured to automatically

pop the CRM contact when the call is answered, which depends on the Automatic Contact Pop tab settings as shown on the left.

3.2 CONTACT SEARCH

When you perform a contact search, Votacall Unity will check all directories such as the group/enterprise phone-list, personal directory and Outlook etc; but it will also search Zendesk and return results. Simply double click or right click an entry to make the call.

Please note that you will need to type in a minimum of three letters to search for a CRM contact.

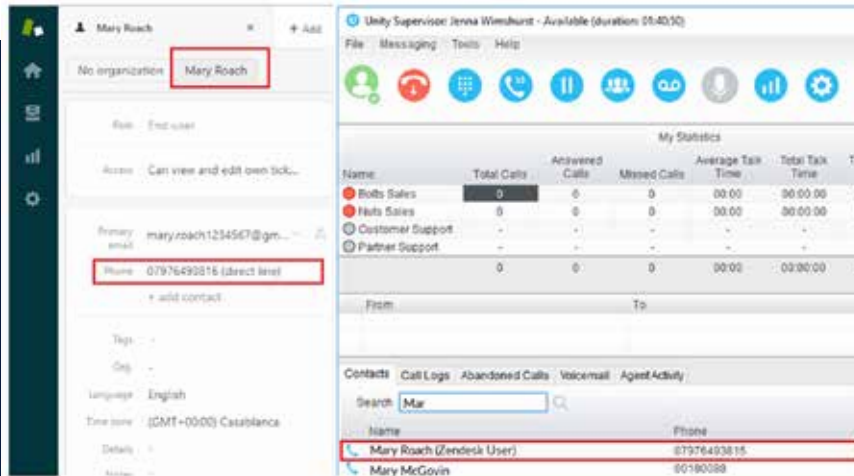


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Please note that the contact popping feature is dependent upon the appropriate Call Notification setting being marked active

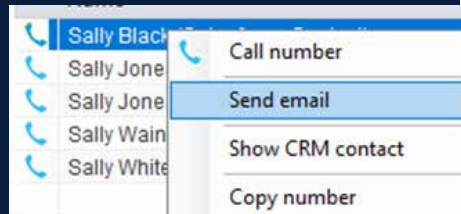


Contact Search

Simply double click or right click an entry to make the call.

Please note that you will need to type in a minimum of three letters to search for a CRM contact.

You can also right-click entries to send an email (if the CRM contact has an email address assigned) using the default mail program.



3.3 CALL LOG ENTRY

When integrated with Zendesk, Votacall Unity can add call log entries on behalf of the user. Votacall Unity will create tickets for call logs and contact center conversations, and the ticket type will be set as a "Task".

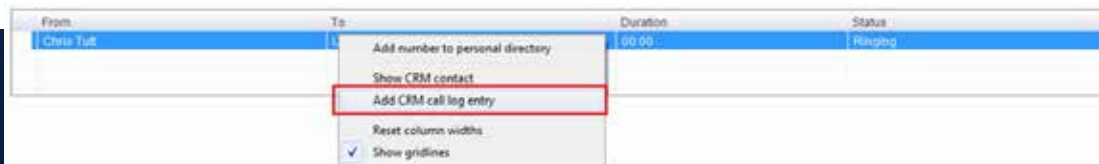


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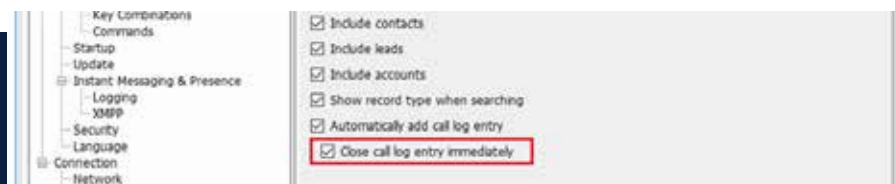
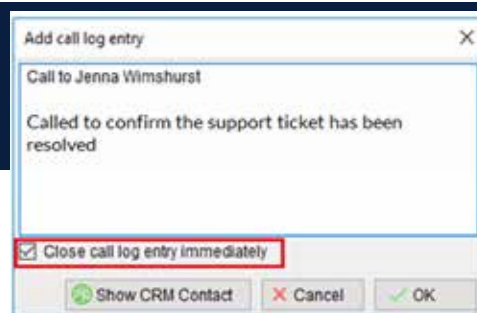
3.3.1 MANUAL CALL LOG ENTRY

When integrated with Zendesk, Votacall Unity also allows you to add a call log manually.



Right-click on a call and select to add a manual call log entry, as shown above.

You can now add further notes manually, then click OK to save the call log entry.



The call note will be saved against that contact in Zendesk, please note that you can specify whether to close the status of the call log entry in Zendesk or keep it open by ticking the box.



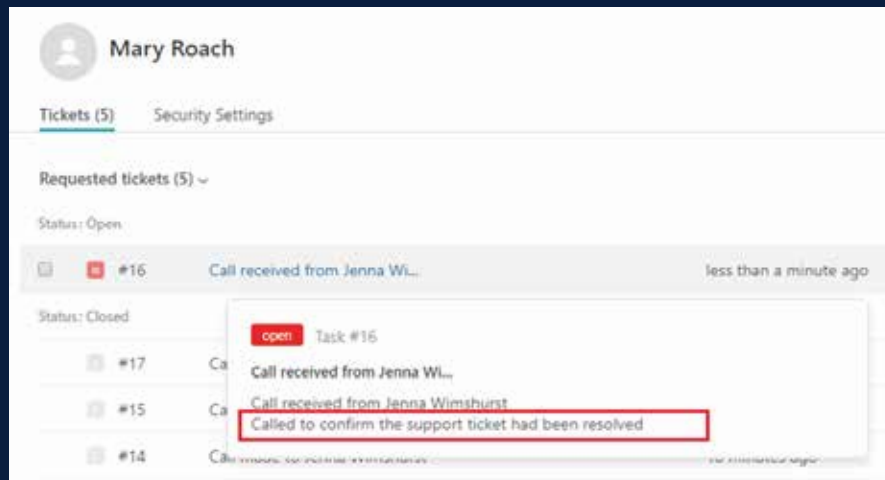
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If you click Show CRM Contact or Cancel then the call log will not be saved.

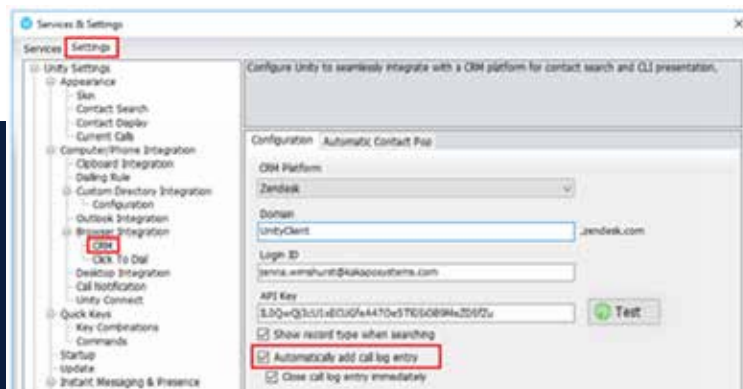
You will now see this call log entry in Zendesk, as shown below.



3.3.2 AUTOMATIC CALL LOG ENTRY

Votacall 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. This feature is activated as shown below.

Automatic
Call Logging
is active



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How does automatic call logging work?

Votacall Unity will automatically add call log entries when the call is released (the same time it is removed from the

Active Call List in Votacall Unity). Only basic information on the call is presented, based on the direction of the call and the Votacall Unity user that made or received the call. Zendesk will timestamp the call internally.

John Bonham

New Ticket

Tickets (10)

Security Settings

Requested Tickets (10) ▾

Status: Search

#9

Call received from Chris Tutt

Monday 14:40

Monday 14:40

Support

Chris

#5

Call received from Chris Tutt (unanswered)

Monday 08:10

Monday 08:10

Support

Chris

Status: Closed

#12

Call received from Chris Tutt

Today 01:19

Today 01:19

Support

-

#11

Call received from Chris Tutt

Yesterday 20:06

Yesterday 20:06

Support

-

FOR MORE INFORMATION ON
VOTACALL UNITY CRM INTEGRATION FOR ZENDESK
PLEASE REACH OUT TO THE VOTACALL SOLUTIONS GROUP AT:
SOLUTIONS@VOTACALL.COM

