

## OPTION 1

# Centric Hosted Contact Centre Integration with Salesforce.com CRM

*What Centric - Salesforce.com CRM integration provides:*

1. **Click-to-dial. Agent can click a call button within a customer account to automatically start a call**

Either by hyperlinked fields or buttons (we will need to make changes to your Salesforce setup)

2. **Screen pop ups – as calls are routed to agents the customer details are recognised and displayed on Salesforce**

If the contacts phone number exists in Salesforce there contact details page will be popped alongside the log call page with the following fields pre-populated call reference id (required for call recording link) & start time. If not a new contacts page will be popped with the telephone number field pre-populated.

3. **Calls (time, date and duration) automatically logged in Contact Activity History**

At the start of a call where the phone number existed within Salesforce we can pop the contact details page alongside the log call page with the following fields pre-populated call reference id (required for call recording link) & start time. The same is screen is shown at the end of a call if the phone number did not exist in Salesforce before the call but was added during the call.

The agent will then have the opportunity to add details about the call to the page.

They must click save on the webpage before closing the IE tab.

4. **Session Recording – a link to the session recording's logged in contact activity history**

Using the call reference id passed to the log call page we can create a link on the call activity view page to the CentricOrder page allowing you to play back the recording.

The link can either be a button or a hyperlinked field (we will need to make changes to your Salesforce setup)

## 5. Centric Historical Reports – a link to the CDR Actions report

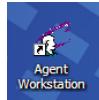
Using the call reference id passed to the log call page we can create a link on the call activity view page to the CentricCorder page allowing you to view information about the call from Centric's Historical Reports.

The link can either be a button or a hyperlinked field (we will need to make changes to your Salesforce setup)

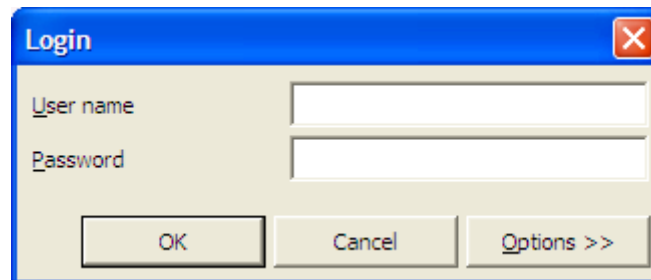
***From an agent point of view currently the integration is as follows:***

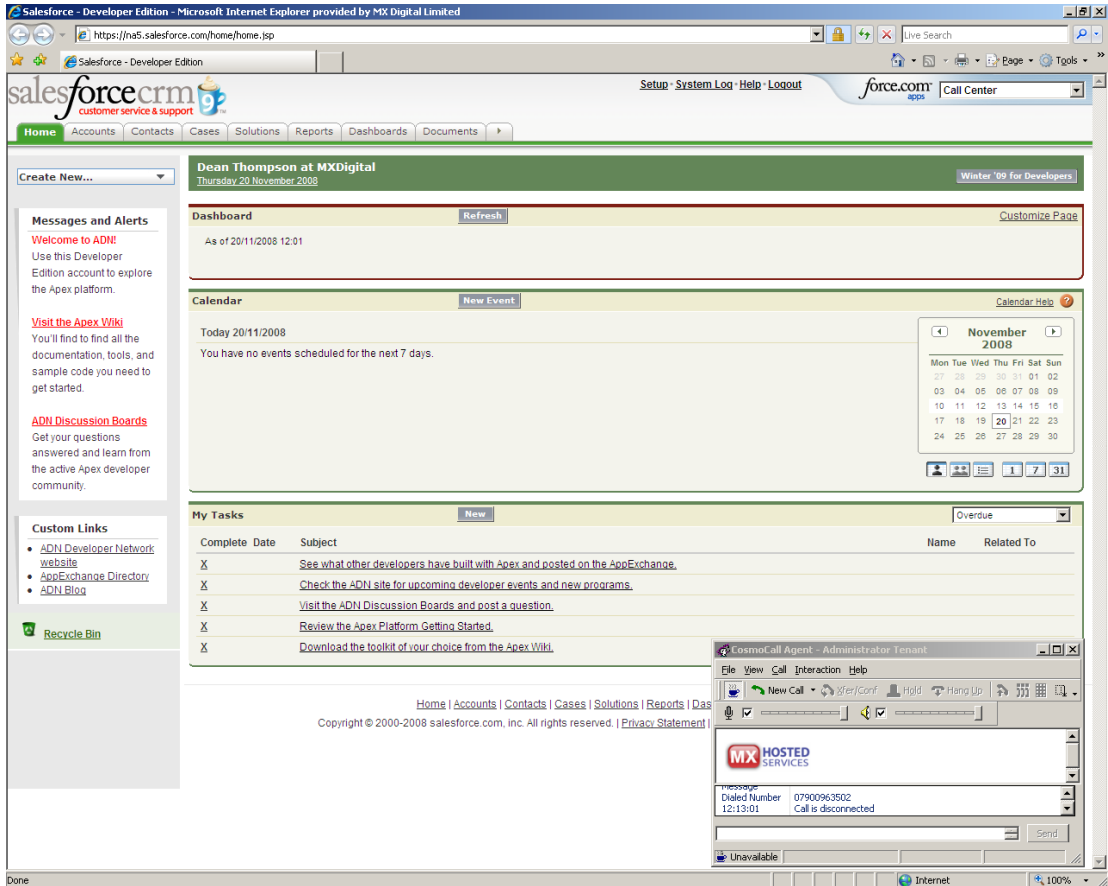
The following screenshots cover opening the Agent workstation and then making and ending a call:

### 1. Open agent software

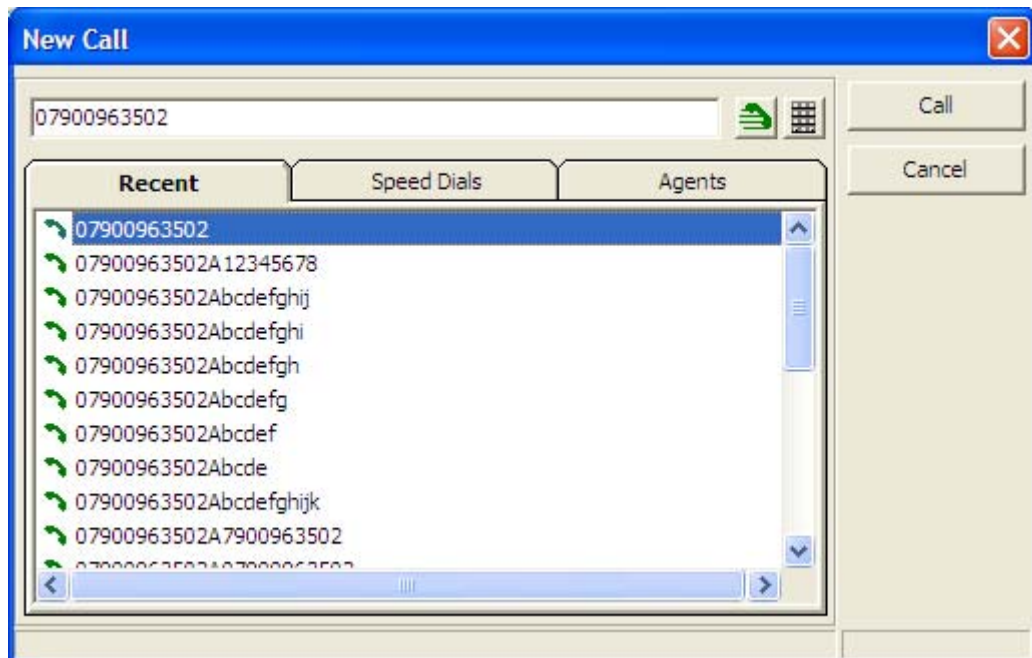


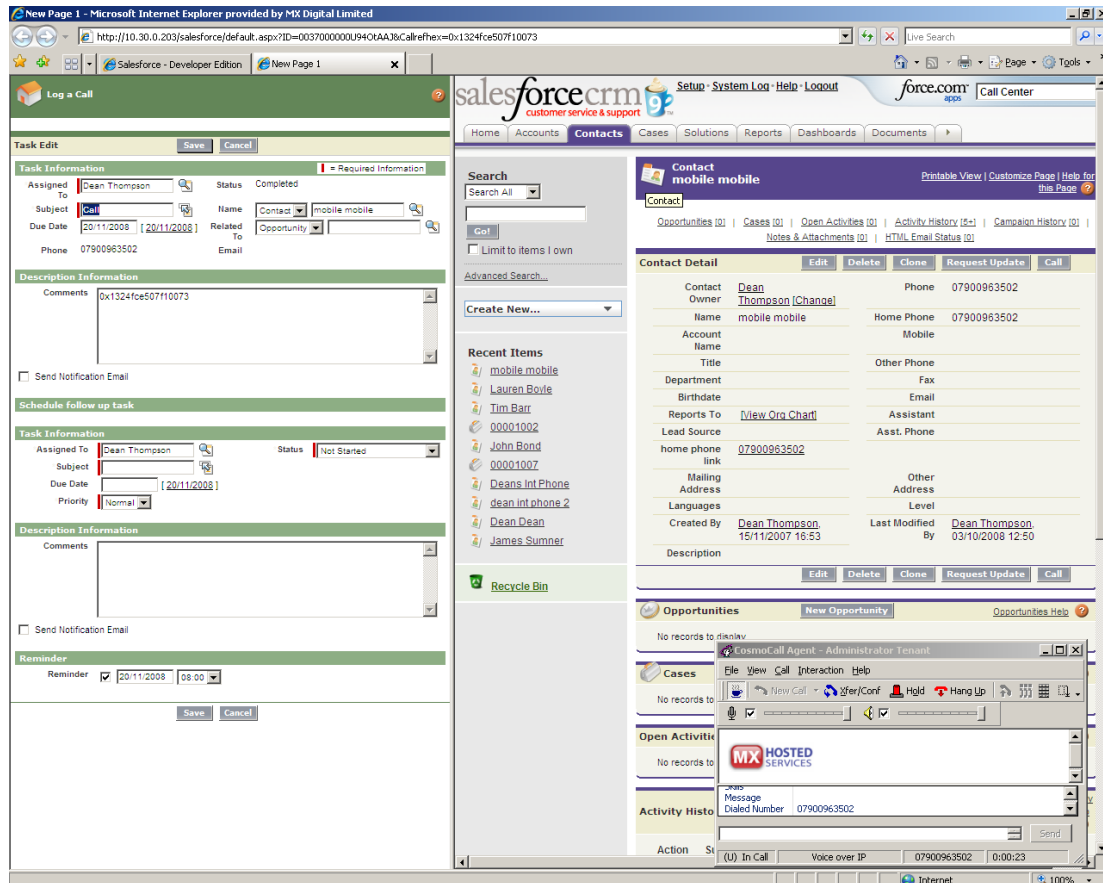
### 2. Enter agent login for Centric

A screenshot of a 'Login' dialog box. The dialog has a blue title bar with the text 'Login' and a close button (X) in the top right corner. Below the title bar, there are two input fields: the first is labeled 'User name' and the second is labeled 'Password'. At the bottom of the dialog, there are three buttons: 'OK', 'Cancel', and 'Options >>'. The 'Options >>' button is highlighted with a blue border.

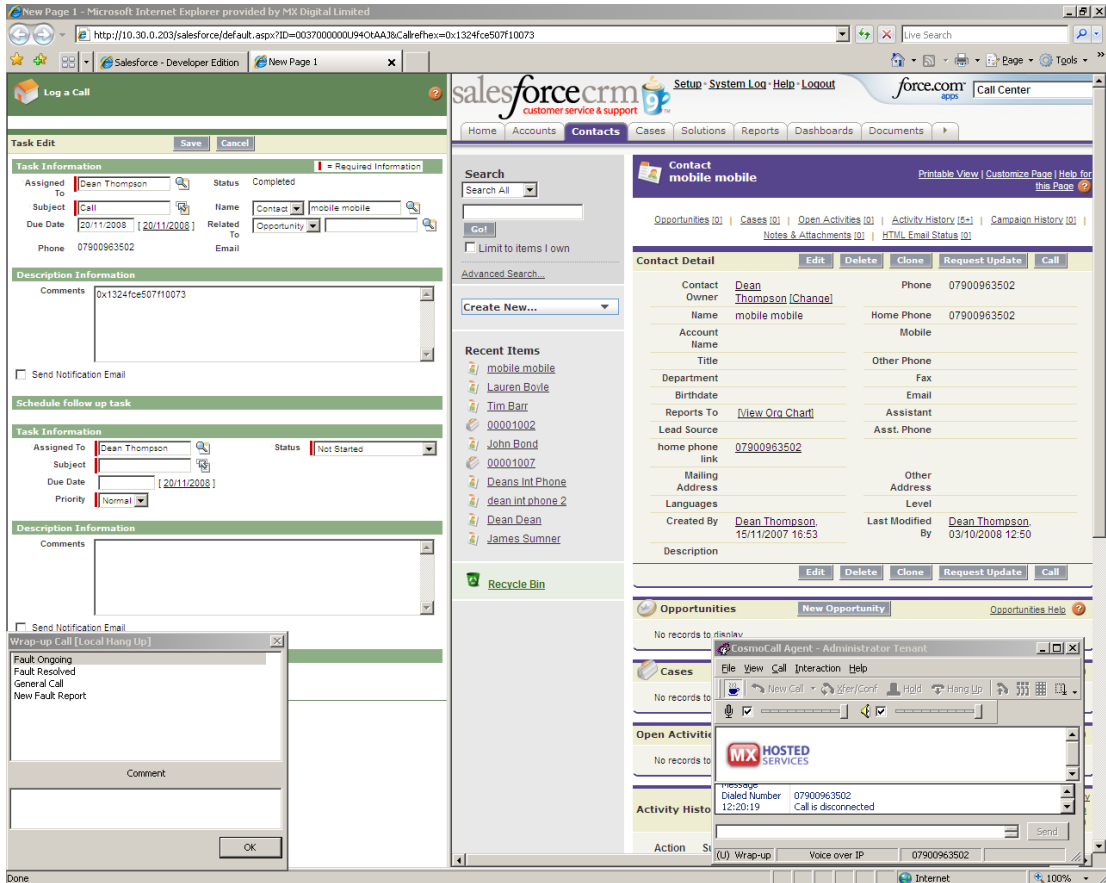


3. Make/take call prompts with either contact details page alongside the new call page if phone number exists in any of the phone number fields of a contact or new contact page with phone number field pre-populated.

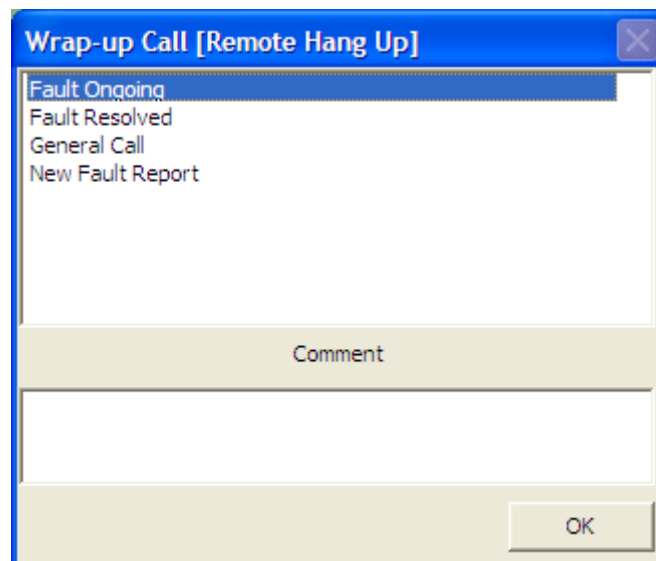




4. End of call brings up wrap-up selection box (the ie tab is left open until the user closes it). If the phone number did not exist but was added during the call the user will be prompted with the contact details alongside new call.



5. Select Centric wrap-up code



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