

OPTION 2

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 up's – 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 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 end of a call where the phone number existed within Salesforce we can pop the log call page with the following fields pre-populated call reference id (required for call recording link), start time, end time and duration. The above is also true 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 wrapping up the call with centric wrap-up code list.

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 CentricCorder 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

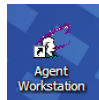
Using the call reference id passed to the log call page we can create a link on the call activity view page to the CentricCorder page allowing you to view information about the call from Centric's Historical Reports.

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

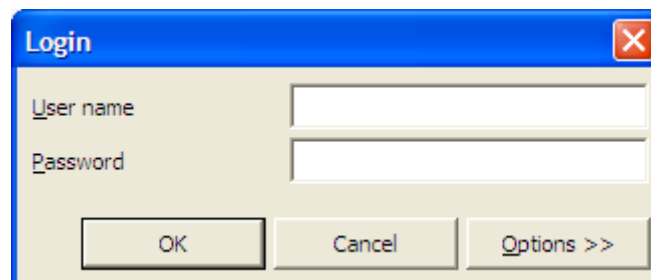
From an agent point of view the integration is as follows:

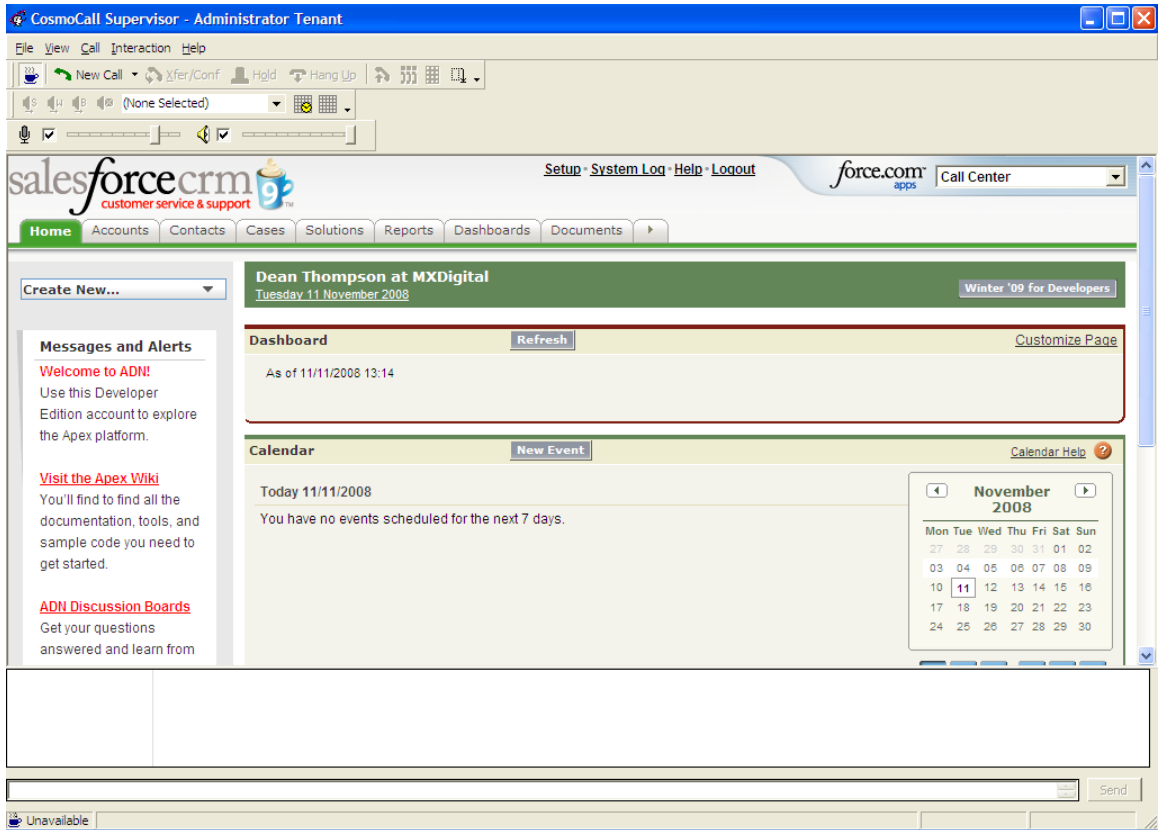
The following screenshots cover opening the Agent workstation and then making and ending a call:

1. Open agent software

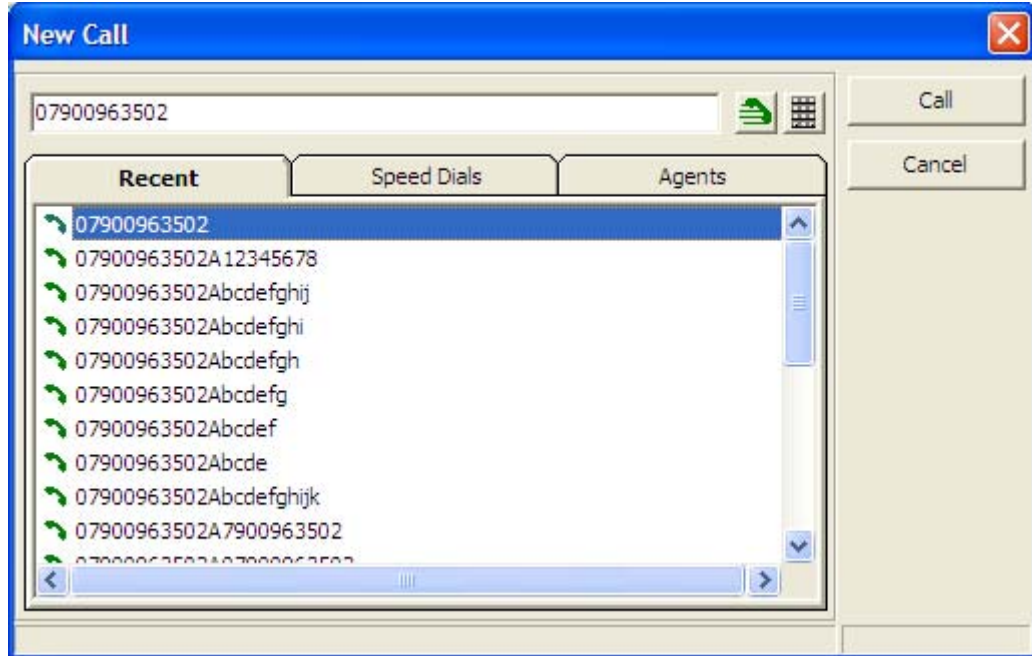


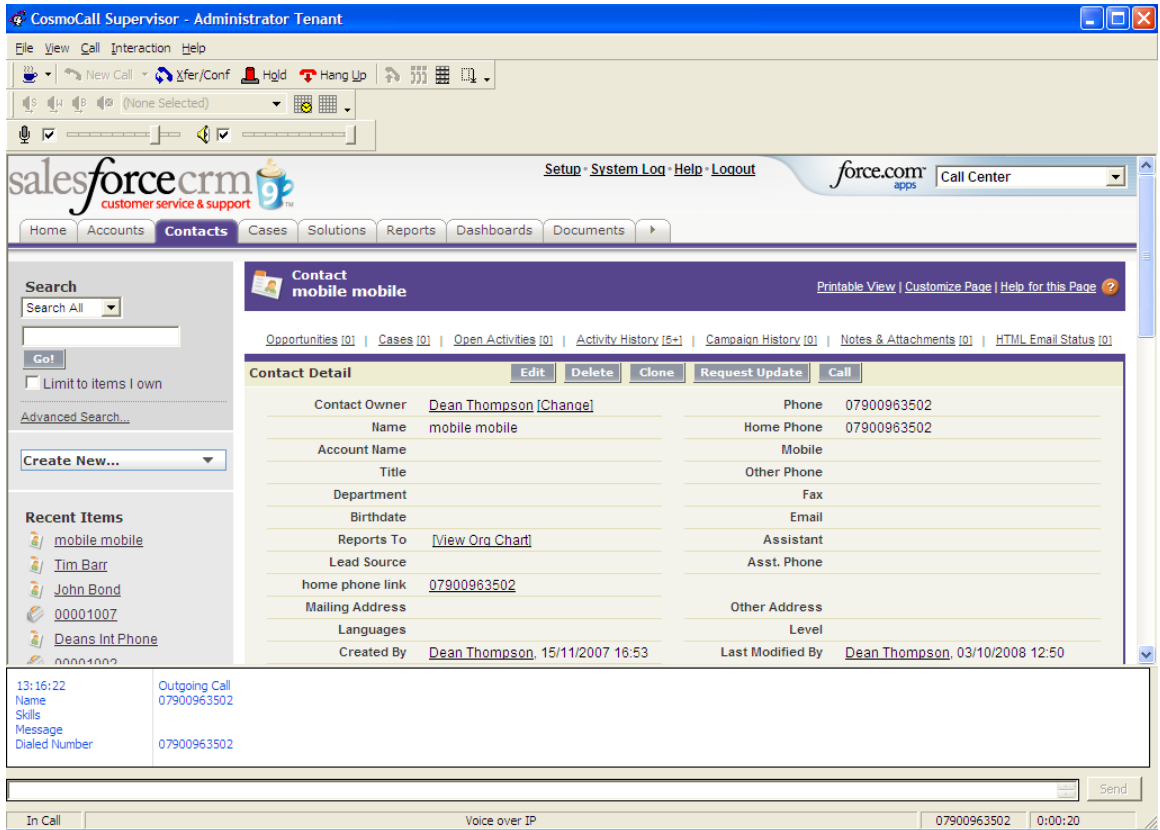
2. Enter agent login for Centric

A screenshot of a 'Login' dialog box. The dialog has a blue title bar with the word 'Login' and a close button (X). It contains two text input fields: 'User name' and 'Password'. Below the fields are three buttons: 'OK', 'Cancel', and 'Options >>'. The 'Options >>' button is highlighted.

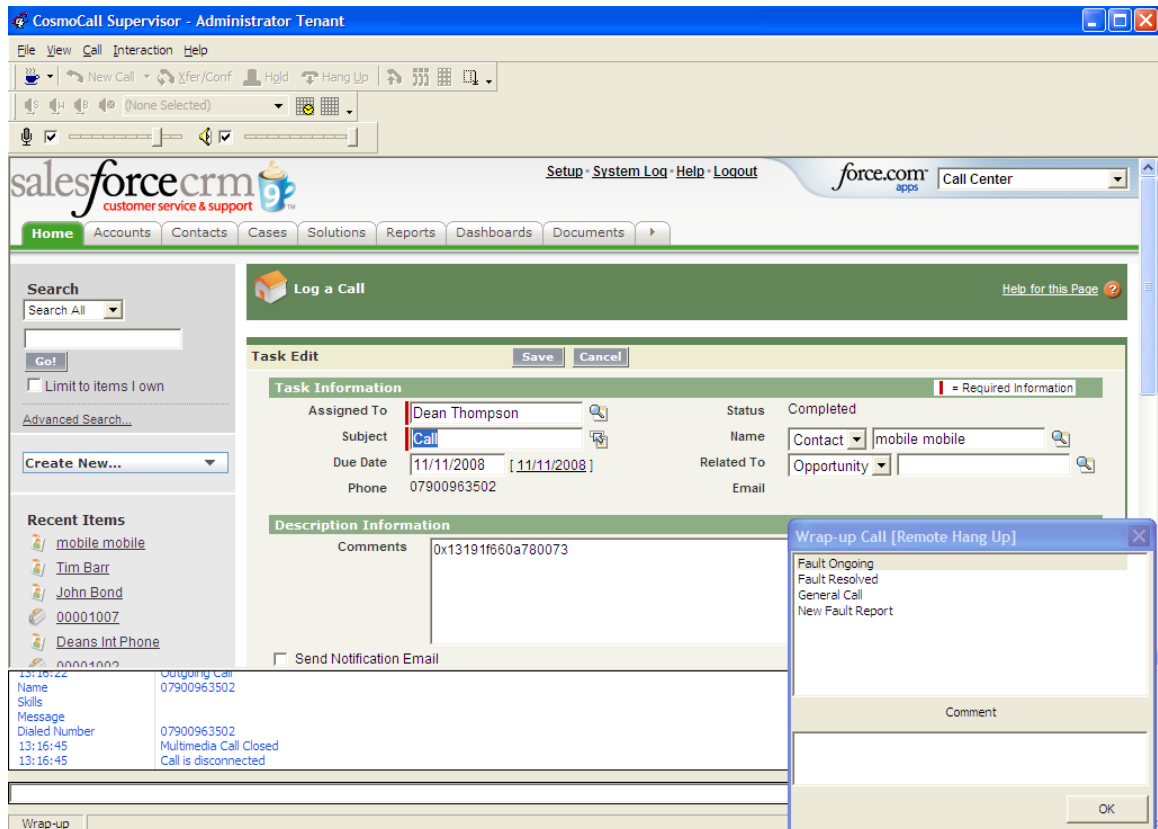


3. Make/take call prompts with either contact details page if phonenumber exists in any of the phone number fields of a contact or new contact page with phone number field pre-populated.

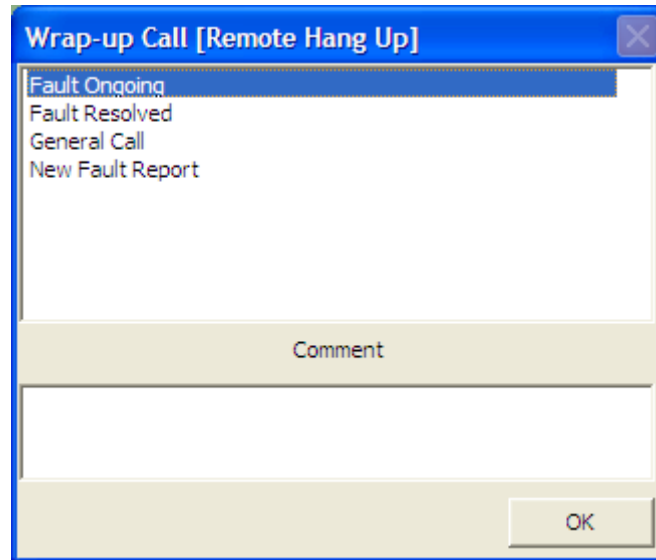




4. End of call prompts with log a call page for the contact with call id pre-populated unless phone number did not exist for any contact and wasn't added during the call.



5. Select Centric wrap-up code



Wrap-up Call [Remote Hang Up]

- Fault Ongoing
- Fault Resolved
- General Call
- New Fault Report

Comment

OK

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