



UniAgent™

CTI Connector for Salesforce CRM (Open CTI)

Product Datasheet



Consilium Software Inc.

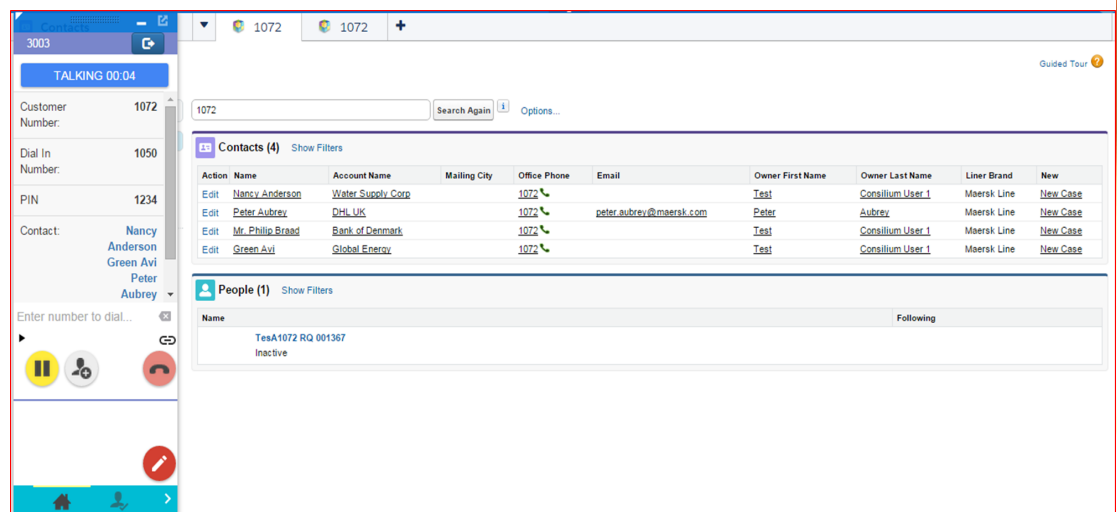
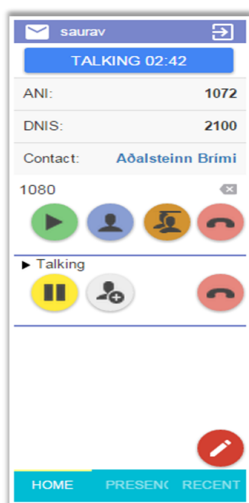
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Consilium UniAgent™ CTI connector for Salesforce CRM (Open CTI)

An integral part of Consilium UniSuite™, **Consilium UniAgent™** ‘out of the box’ solution for Salesforce CRM provides **pre-integrated** solution that delivers seamless connectivity with Cisco Unified contact center’s, and enables full CTI functionality in Salesforce CRM. The CTI connector offers easy-to-use call controls and productivity enhancement features that streamlines contact center operations, intelligently manages customer interactions and deliver superior customer services by providing a powerful collaboration and management tool to contact center agents.

UniAgent™ assists contact center’s to be efficient and complete customer centric by allowing agents to handle telephone calls from within Salesforce CRM and avoid switching to different screens for handling customer queries. This results into providing swift response to caller queries and faster resolution to case. The solution is fully **browser based** enabling faster rollout of services across enterprises and contact centers. Being embedded in Salesforce CRM, agents can intelligently manage inbound calls and see interaction and logs for the cases. Thus streamlining agent workflow and making it easier for agents to handle calls efficiently. The solution also offers the options of reporting and analytics allowing supervisor to monitor agents performance and increase contact center productivity and performance by focusing on important KPI’s and removing bottleneck.



UniAgent™ Uniqueness

- Simplifies User experience by presenting a easy to use interface and functionality
- Easily configurable to seamlessly integrate with any 3rd party applications such as chat, voice etc.
- Facilitates interoperability among UniAgent, Cisco and Salesforce to effectively manage customer interactions
- A versatile solution which focuses on scalability, stability and high availability
- A proven solution which provides full interaction navigation functionality through Salesforce
- Focused on continuously enhancing contact center metrics and assist you in achieving improved business outcomes
- Completely browser based solution with Zero installation on Agent machine
- Addresses key contact center challenges related to adoption of right technology to create better experience, managing call volumes, and improving key contact center metrics
- Lowest cost of ownership comparing usage over 3 or more years
- Smart call transfers based on agent presence indicators

Consilium UniAgent™ Features

- **Notes:** Increases agent after call work activity by allowing them to take notes during their call and save it for later reference. The notes can be taken during the call itself which significantly reduces after call activity and enhances agent productivity
 - **Admin Console:** A portal for simplifying administration and configuration of UniAgent™ settings. Supervisor/Administrator is able to make changes to UniAgent™ GUI, hide/show particular features, voice settings using Admin console
 - **Screen Pop :** Improves customer satisfaction and agent performance by quickly displaying caller data as soon as the call arrives. Screen pop is based on ANI / CED / DNIS or combination. Agent beforehand is able to see caller records based on phone number or IVR information
 - **CTI Integration:** Seamlessly integrates your Cisco contact center with Salesforce.com GUI. The integration enables agent to effectively handle customer interactions and provide more personalized services
 - **Bookmark transfer:** Transfer customer records, notes and other data to the call receiving agent thus reducing call handle time between Cisco agents. Displays records based on collected IVR information captured
 - **Click-to-Dial:** An outbound dialing functionality which enables agent to call directly to prospects from any phone fields using UniAgent™. Agent is able to dial from any Salesforce record such as account, cases, activities and history
 - **Agent state:** Once agent login to UniAgent™ softphone its by default login into Not Ready for call state. In this state Agent will not receive any call but can make any outbound calls. The Not Ready state is represented by Red colour status. Once agent is ready for answering calls, he changes the state to Ready. The Ready state is represented by Green color
 - **Reason Codes:** UniAgent™ provides reason codes to agent during call wrap-up, change to not ready state and logout from system. Assists supervisor to track agent's productivity through reports
 - **Case pop-up on incoming call:** Associates a case with incoming call and pop up relevant data on the agent screen
 - **Agent Presence:** An 'out of box' features agents can use during call to collaborate with other agents. During a call, agent can click on presence tab and see the list of available agents in his skill group. Agent can then select appropriate agent and take him into the call. The Presence significantly reduces time it take an agent to get to next available agents
 - **Agent Reports:** UniAgent™ assists supervisors and managers to track contact center performance and agent performance through historical reports tab. UniAgent™ generates reports of agent performance over days/weeks/months/year
 - **Call Logging:** UniAgent™ automatically log calls, duration and phone as activities in Salesforce.com and minimizes agent time spent on manually logging of calls
 - **Multi browser support:** IE; Google Chrome; Mozilla Firefox
- Single Sign-on:
- Optional Features:
- **Unified GUI:** Consilium UniAgent™ is architected to easily integrate automated outbound campaign, list management, callback and web callback solution UniCampaign™ and real-time analytic solution UniDashboard™ into UniAgent™. This facilitates agents to make automated outbound calls directly from UniAgent™ and allows supervisors or contact center managers to view real-time performance of agents and KPI's critical to improve customer experience management
 - **Predictive and Preview dialing:** Allows inbound agents to proactively contact customers with timely information and services using predictive and preview dialing capabilities
 - **Voice logger integration:** Seamlessly integrates UniAgent™ softphone with any Third party voice logger solutions to enable call recording capabilities.

UniAgent™ Functionalities

Consilium UniAgent™ Cisco Unified Contact Center based CTI connector for Salesforce CRM provides following rich functionalities to agents through pre-packaged integration which allows agent to work seamlessly and productively in their familiar customer management interface.

- Native app for both Salesforce.com Sales and Service cloud
- Complete CTI functionality such as answer, hold, transfer, conference and consult embedded within Salesforce CRM
- Provides seamless integration between Cisco and Salesforce via Cisco Finesse API or Cisco Agent Desktop or CTIOS
- The call answer event in Cisco Agent application is coordinated with CRM screen-pop corresponding to data collected and service requested in the IVR
- Associate Salesforce service case with the incoming calls
- Enable agents to search a contact in CRM and click the phone number to call
- Show detailed customer records by pre-populating screen
- Passes data to the Salesforce CRM for screen pop including Caller Entered digits (CED) ANIS or DNIS or combination, call variables, including expanded call context (ECC) variables.
- Supports leading Cisco Telephony platform such Cisco Unified Contact Center Enterprise (UCCE), Unified Contact Center Express (UCCX), Cisco PCCE, Cisco Unified Call Manager (CUCM) and Cisco Finesse
- Provides similar UI and functionality irrespective of the telephony platform.
- Provides real-time agent and skill group statistics, automates number identification as well as dialed number identification service (DNIS)
- Offers centralized administration portal for management of configurations related to User Interface, voice settings etc.
- Offers functionality for outbound preview and progressive dialing from within UniAgent™ and call logger integration through various third party apps such as NICE, VERINT, TELSTRAT etc.

UniAgent™ Focus

- **INTEGRATION:** UniAgent™ “Out of the box” CTI connector seamlessly integrates into Salesforce Sales Cloud and Service Cloud via Open CTI. It assists agents in efficiently handling inbound and outbound calls directly from within the Salesforce desktop
- **EXPERIENCE:** UniAgent™ enriches the user experience by embedding the softphone into the Salesforce desktop, empowers agents with valuable information and rich customer context to improve the customer experience
- **PRODUCTIVITY AND MANAGEMENT:** Takes agent productivity to new heights with notes, presence, reports and centralized administration. Contact centers managers can look into historical reports and device strategy for improving agent performance

Agent Empowerment

Consilium UniAgent™ empowers agent by allowing agent's to collaborate in real time and faster access to information. Presence capabilities reduce search time for qualified help during collaboration on customer inquiries and create a streamlined pathway for real time support.

Agent and queue statistics available within UniAgent™ empower agents to make faster decisions and compare their performance with others in their team.

With automated dialing capabilities, such as click-to-dial and screen pop coordinated with call delivery, agent can actively engage with customers to improve customer retention, maintain profitability, and achieve top-line growth

Summary

UniAgent™ thus empowers Contact centers with the technology to easily engage in customer interactions. Tight integration of Consilium UniAgent™ with Salesforce CRM ensures that the customer inquiries and issues are addressed more efficiently and effectively, supporting increased first contact resolution and an improved customer experience.

UniAgent™ Technical Specifications

The below table describes the requirement of each component for running Consilium UniAgent™

Deployment Type	On-premise
Supported Cisco Platforms	UCCE 8.x and above UCCX 8.x and above CUCM 8.x and above
Cisco Agent Desktop Supported	Cisco Agent Desktop (CAD); CTIOS; Finesse
UniAgent™ ~Browser based	
OS and Software Requirements for Agent Desktop	
Agent Desktop	Windows 7 (32-bit / 64-bit) Windows 8 (32-bit / 64-bit)
Browser	I.E. v9.0 and above; Google Chrome v32 and above
HW/SW requirements Server Side: For deploying UniAgent™ Server and Portal for managing licenses and features.	
Server	Dedicated/Shared Windows 2008 R2/2012
Server Type	Virtual Machines
Processor	Intel Xeon Dual core, Dual CPU(2.67 GHz)
Processor speed	2.67 GHz and higher
Memory Requirement	8 GB RAM (minimum)
Hard disk Requirement	80 GB Hard disk
Network	2 X 100 mbps
IIS	7.0 and above
.NET Framework	4.5
Database	MS SQL Express (Freeware)

UniAgent™ CTI Connector Flavors

PRODUCT VERSION	CISCO PLATFORM	AGENT DESKTOP	CRM
UniAgent™ 4.0	Cisco UCCE	Finesse API	Salesforce
UniAgent™ 4.0	Cisco UCCX	Finesse API	Salesforce
UniAgent™ 4.0	Cisco UCCE	CTIOS	Salesforce
UniAgent™ 4.0	Cisco UCCX	ACME	Salesforce
UniAgent™ 4.0 TAPI connector	Cisco Call Manager CUCM		Salesforce
UniAgent™ Gadget based	Cisco Finesse	Finesse Agent Desktop	Salesforce

The Consilium UniAgent™ Framework has been verified by Cisco as Cisco Compatible

The Cisco Developer Network verifies that **Consilium UniAgent SFDC CRM Connector 1.0, for UCCX**, a product offering from **Consilium Software Inc** has tested compatible with the Cisco Systems, Inc. products specified below on **01/2012**

Product and Version

- Consilium UniAgent SFDC CRM Connector 1.0, for UCCX

Cisco Systems, Inc. Product and Version

- Cisco Unified Contact Center Express, 8.0

Consilium UniAgent SFDC CRM Connector 1.0, for UCCX has tested compatible with Cisco Unified Contact Center Express, 8.0. The Cisco Compatible logo signifies that Consilium Software Inc's product has undergone interoperability testing by Consilium UniAgent SFDC CRM Connector 1.0, for UCCX together with Cisco, based on testing criteria set by Cisco. Consilium Software Inc is solely responsible for the support and warranty of its product. Cisco makes no warranties, express or implied, with respect to Consilium Software Inc's product or its interoperation with the listed Cisco product(s) and disclaims any implied warranties of merchantability, fitness for a particular use, or against infringement. Cisco has the right to revoke this verification of compatibility at any time. For the latest status of certificate validity, please refer <http://developer.cisco.com/web/partner/search>.



About Consilium Software

Consilium Software develops unified communications (UC) software and solutions for enterprises and contact centers. Consilium Software offers a complete solutions platform for unified communications and collaboration with alliance products, Consilium technology powered services and Consilium's proprietary Uni™ suite of products and applications. The Consilium UniCloud™ Service Automation Platform enables easy transition of unified communications and contact center applications to cloud-based delivery. Consilium Software continues to deliver the highest levels of customer satisfaction, ease of use and manageability while bringing down the overall total cost of ownership. Consilium Software is headquartered in Singapore, with software development and engineering labs in India, and subsidiaries and branch offices in Malaysia (Kuala Lumpur), Taiwan (Taipei City), Thailand (Bangkok), Australia (Melbourne) and Canada (Toronto.)