

# inContact **Agent** and inContact **Admin for Salesforce**

Agent and Admin Functionality Seamlessly Integrated with Salesforce

When most CRM work happens in conjunction with other systems, the pain of managing all these systems plus a contact center system can be challenging. Even the best CRM and contact distribution platforms won't relieve that pain unless they work together seamlessly. Without intelligent integration, agents must re-key data such as phone numbers, account numbers and case file IDs and switch back and forth between windows. Supervisors may have to use an unfamiliar interface to create and manage agents and skills. Precious time is wasted manually transporting data, familiarizing yourself with new interfaces and clearing space on the monitor.

Agents can become frustrated by not having a customer's CRM record open automatically when they receive a routed interaction. They need the ability to handle all interactions in a consolidated manner and using intuitive, consistent controls, regardless of channel. Without an integrated solution, the simplest call center tasks can seem nearly impossible.

The inContact Agent for Salesforce solves these problems by displaying all required controls within the Salesforce Sales and Service cloud interfaces. The simple, elegant interface enhances agent performance not only by providing all operational controls and key information when and where the agent needs it, but also by giving agents access to their own reports and—for comparison—their team's statistics. An optimized agent experience leads to better customer service and ultimately, an improved customer journey.

The inContact Agent for Salesforce provides:

- An easy to use, intuitive interface with Salesforce screen pops based on customer information such as caller ID or input from the IVR, email address or other identifiers
- Streamlined multichannel contact handling in a consolidated interface for inbound and outbound voice, email, voicemail, inContact chat and Salesforce cases
- Integration with Personal Connection for advanced outbound dialing, as well as click-to-dial, to speed up direct outbound calls to phone numbers saved in Salesforce.com

## **INCONTACT AGENT FOR SALESFORCE BRIEF OVERVIEW**

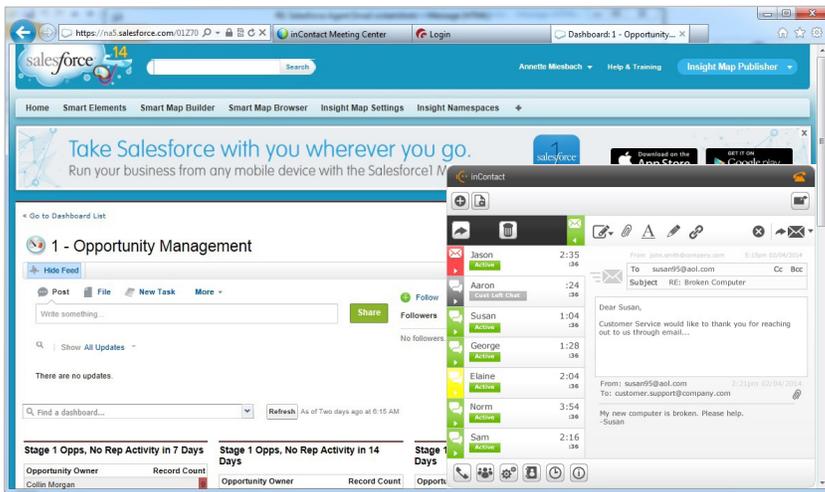
The inContact Agent for Salesforce enables intelligent contact routing so the contact and customer information are delivered on a single, unified screen on the agent's desktop—Salesforce.

## **KEY FEATURES**

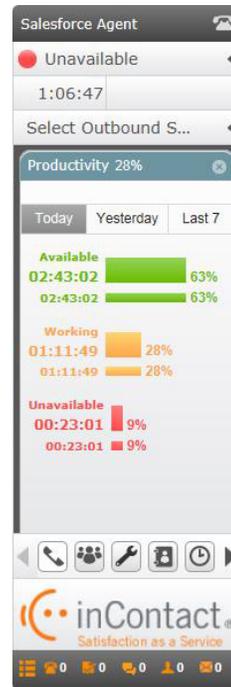
- Integrated interface for agents and supervisors
- ANI and DNIS screen pops and scripts
- Supports inbound and outbound voice (including click-to-dial), commitments, email, voicemail, inContact chat interactions and routing for Salesforce cases
- Agents can see their personal and team statistics on performance and productivity
- Automated call record creation in Salesforce

- Personal reports for performance and productivity to each agent and the ability to them to their teams statistics within the integrated agent interface
- Automated contact record creation in Salesforce including the ability to write to any field in Salesforce
- Salesforce Omni-channel Presence integration with a consolidated state based on both Salesforce and inContact interaction status, for example to prevent Salesforce Live Agent chats to be assigned to an agent on top of a routed inContact interaction (or vice-versa)

The inContact Agent for Salesforce provides agents with seamlessly integrated multichannel contact handling tools, including advanced functionality such as parking emails.



Floating Agent handling multiple contacts



Agent Reports

## MORE KEY FEATURES

- Multi-tab/multi-browser support
- Custom triggers and proactive prompts
- Co-brand the inContact Agent for Salesforce with your logo

## INCONTACT ADMIN FOR SALESFORCE BRIEF

The inContact Admin for Salesforce allows contact center supervisors to execute day-to-day tasks from within the Salesforce interface

## KEY FEATURES

- Create, manage and assign most skills from within the Salesforce interface
- Create new agents from within the Salesforce interface that are tied to the Salesforce user, allowing for basic agent configuration from within the Salesforce interface

## inContact Admin for Salesforce

The new inContact Admin for Salesforce has been purpose-built to allow contact center supervisors to execute more of their day-to-day tasks from within the Salesforce interface.

In environments where Salesforce is the tool of choice and the main interface for business processes and access to customer data, it is a big time saver when supervisors can simply create and manage and even assign skills to their agents from within the Salesforce interface. inContact's new integration allows doing exactly that for almost all skills supported by the system (exception: Personal Connection skills).

In addition to that, supervisors can even create new agents from within Salesforce—no need to juggle applications or to familiarize yourself with a new interface.



inContact is proud to be a Salesforce Gold ISV Partner.