

MULTICHANNEL CLOUD CONTACT CENTER SALESFORCE.COM INTEGRATION

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P A T •
T E R N

Sales Cloud Agent Desktop



COMPLETE INTEGRATION

Pop contact and cases, dial people in one click, transfer with screen, post activity history automatically



ANY BROWSER

Simplify deployment with Chrome, Firefox, IE or Safari, no extensions are required



ANY PHONE

Use supplied optional softphone extension or a PSTN phone (dial in and stay on the line or have system dial the number) all options keep the call going when the browser is restarted, all use the same controls on the web widget



ANY CHAT

Chat, SMS, Social messaging with Facebook, WeChat, LINE and Telegram (all priced as an inexpensive option) along with internal chat. Chat and messaging are pushed to desktop using multimedia skills-based distribution. Multiple chat sessions on agent and phone calls override chat.



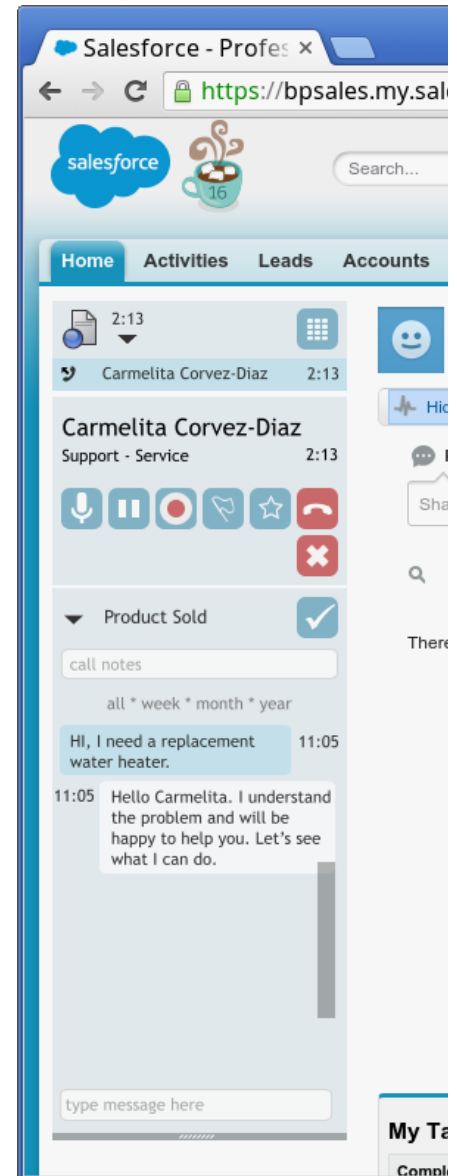
SINGLE SIGN-ON

Logging into Salesforce.com logs an agent in automatically



UNIFIED SUPERVISION

Supervisor role, in addition, gets real-time stats, call monitoring and grading along with team messaging



Integrated Dialer



AUTOMATED LIST SYNCHRONIZATION

Use any list of objects from Salesforce.com to drive your campaign. Filter on any combination of fields



AUTOMATED RESULTS PROPAGATION

Create any Salesforce.com objects based on campaign results with fields pre-filled with results data



PREDICTIVE, PROGRESSIVE OR PREVIEW DIALER

Dial in any mode needed for business



MAXIMIZED SUCCESS RATE

Using RPC, answering machine detection and safe calling hours

Salesforce IVR, Chat Bots & Automation



IDENTIFICATION

Identify callers by phone or case number, prioritize them based on their Salesforce.com data



SELF-SERVICE AND AUTOMATION

Create cases from after hours voicemails, read case status and close cases over the phone or chat automatically with complete access to Salesforce.com data

The screenshot displays the Salesforce IVR configuration interface. On the left, a list of actions includes: Salesforce.com Delete, Salesforce.com Insert, Salesforce.com Screenpop, Salesforce.com Search, Salesforce.com Update, and Save Survey Response. The main area shows a menu flow for "Welcome" with an "Existing Case" path leading to "Collect Digits 'Case Number'", which branches into "No Input", "Aborted", and "Salesforce.com Search 'Find Case'", which further branches into "Failed". On the right, the "Salesforce.com Search" section provides instructions on using SOQL and SOSL queries, with an example SOQL query: `SELECT Id, Name FROM Account WHERE phone = '$(ANI)'` and an SOSL query: `FIND $(ANI) IN Phone FIELDS RETURNING Account(Id, Phone, Name)`. Below the queries, it notes that columns of the first record are stored in variables and provides a "Title text:" field with the value "Find Account".

Service Cloud Agent Desktop

The screenshot shows the Service Cloud Agent Desktop interface. At the top, there are tabs for "Ms. Bertha Boxer", "United Oil & Gas ...", and "Ms Patricia Feager". The main area displays the profile of "Ms Patricia Feager" with social media icons for LinkedIn, Twitter, Facebook, and YouTube. A chat window is open, showing a message from "Support - Service" at 0:22 with the text "Next: Not Ready - training". The chat window also shows a profile picture and name for "Patricia Feager" and icons for call, chat, and end call. At the bottom, there are links for "Open Activities [0]", "Activity History [5]", "Campaign History [0]", and "HTML Email Status [0]".

Benefits at a Glance

PRODUCTIVITY

- Identified account's information appears as a screen pop and toaster pop-up in Salesforce upon call arrival
- Single sign-on saves time logging in and reduces password problems
- Reaching your customer in one click with click-to-call saves time and minimizes mistakes

CUSTOMER SATISFACTION

- Let customers choose their channel
- Prioritize customers waiting in queue based on Salesforce data
- Minimize the need to repeat information on transfer with Salesforce screen

COST REDUCTION

- Single sign-on reduces the effort of maintaining multiple passwords
- No need to install and maintain integration software on agent computers
- Customer self-service increases satisfaction and reduces costs

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