

PureCloud for Salesforce

Bringing the power of the PureCloud platform to Salesforce



“The PureCloud for Salesforce app has given us a one-stop location for agents to view customer information, transfer calls, and otherwise more efficiently handle interactions. This has not only reduced call handle time, but improved the effectiveness of our service. The net result is happier agents and happier customers.”

Darren Jackson
CEO, Rapid Financial Systems

Executive summary

PureCloud for Salesforce layers the robust PureCloud® platform on top of Salesforce for seamless integration. Agents who use Salesforce as their primary desktop can easily combine the PureCloud platform into their current solutions. The PureCloud for Salesforce integration puts PureCloud telephony, chat and email interactions directly in the Salesforce user interface. It also extends your Salesforce data to include information about each interaction that an agent handles, further increasing the value of that data. You don't need to install anything on a user's computer or maintain or back up anything on your own servers. With PureCloud for Salesforce, you can merge all your organization's tools, efficiently providing the **best customer experience**. Empower your cloud contact center with tools that not only work well, but also work well together.

One solution for voice, chat and email

Your agents might handle inbound interactions, conduct outbound dialing campaigns, manage click-to-dial on leads assigned to them—or a combination of all these tasks. PureCloud for Salesforce is a unified solution that supports all this and more. This integration enables your team to make and manage omnichannel interactions from directly within Salesforce, leveraging robust **PureCloud** functionality such as response management and interaction details.

Set up agents for success

Your customers don't want to hear you say, “Let me pull up your information.” And your agents don't want to say it. So, don't make them. With PureCloud for Salesforce, a simple ANI-based screen pop shows your agents contextual Salesforce data before the conversation even starts. Agents also get their daily statistics within

the PureCloud for Salesforce widget, enabling them to assess how they perform and areas in which they can improve.

Facilitate teamwork

Sometimes it takes more than one agent to help your customers. PureCloud for Salesforce makes it easy for multiple agents to collaborate. When selecting a colleague to call or transfer a call to, an agent can see that individual's real-time presence, status and activity indicators, including the current interaction count. If the other agent uses Service Cloud, the first agent can perform a workspace transfer. Any tab and subtabs that the first agent has open become a screen pop for the second agent, facilitating a seamless transfer of information. Your agents will be equipped with historic interaction details, and your customer will appreciate not having to repeat anything.

Convert a web browser into a phone

With WebRTC (web real-time communication) technology, PureCloud for Salesforce turns an agent's web browser into a phone.

The PureCloud softphone eliminates set-up time and reduces expenses. Now you can focus your organization's resources on the customer experience—not hardware.

Turn interactions into insights

Every interaction matters. PureCloud for Salesforce helps you track interactions and put them into context so you can better understand your customers, your operations and your business. Create a Salesforce activity for any interaction that an agent handles, including information such as connection time, duration, agent name and comments. Each interaction log can link to a recording and full graphical timeline that shows each moment of the interaction.

Capabilities

Omnichannel support

- Voice, callback, automatic call distribution (ACD) email and ACD chat interactions
- Dialer interactions and dialer scripts
- Route Salesforce email/cases using PureCloud ACD

Screen-pop options

- Simple ANI-based screen pops to standard or customer Salesforce records
- Pop to search results
- Pop to Salesforce URL

Embedded user interface

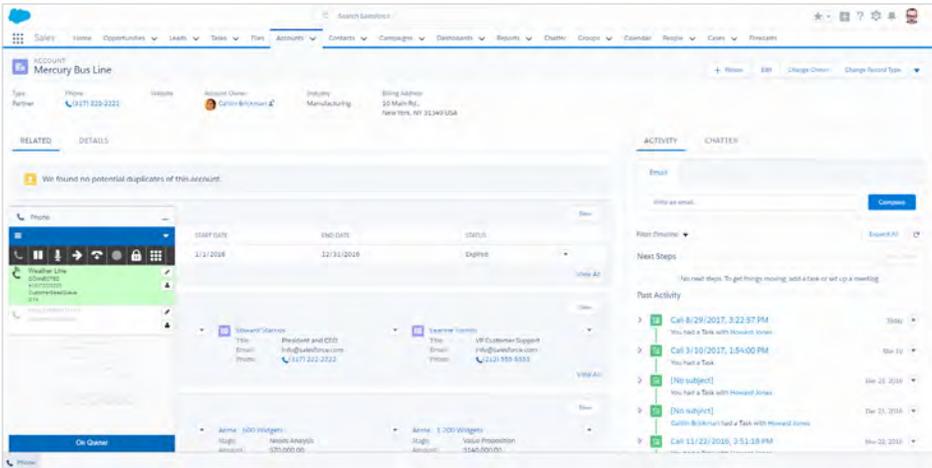
- Click-to-dial support
- WebRTC stations for browser-as-phone capabilities
- Call controls, including record, secure pause and dual-tone multi-frequency (DTMF)
- Blind and consult transfers
- Workspace transfer in Service Cloud
- Type-ahead agent and queue search for dialing and transfer
- Show queue statistics before dialing and transfer
- Drag-and-drop option to create conference calls
- Single sign-on with Salesforce

Interaction logging

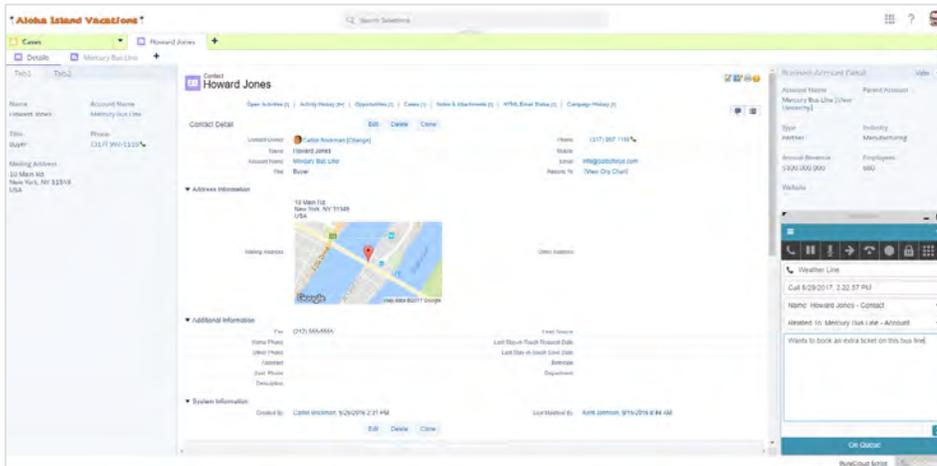
- Record every interaction automatically
- Link to interaction details, including recording and timeline

Salesforce Omni-Channel Sync

- Toggle between ACD engines
- Configure status and transition mappings between Omnichannel Sync and PureCloud



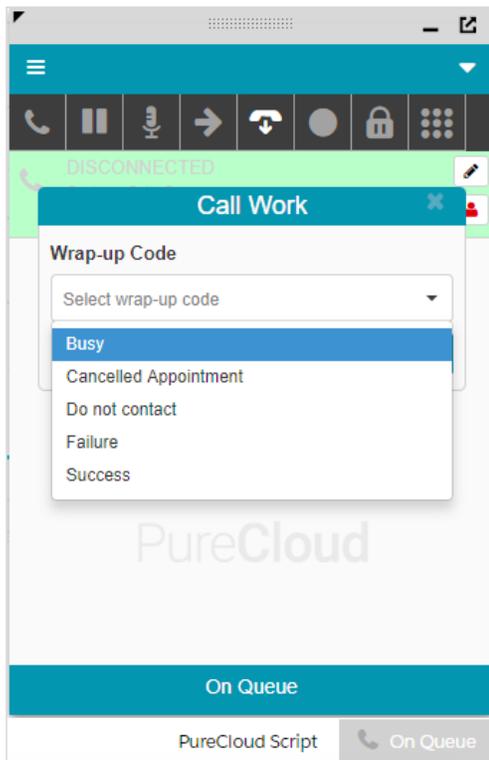
PureCloud embedded in the Lightning Experience interface



PureCloud call controls and interaction details

Specifications

- Requires an additional PureCloud license
- Compatible with Service Cloud, Sales Cloud and the Sales Cloud Lightning Experience
- Genesys is a Salesforce registered ISV partner
- Available on Salesforce AppExchange for easy installation



PureCloud puts powerful customer service tools at your agents' fingertips

Key Benefits

- Easy to deploy and maintain:
Simple install through Salesforce AppExchange with out-of-the-box screen pop capabilities
- Truly omnichannel:
Agents can handle any PureCloud media type, including PureCloud ACD of Salesforce cases
- Unified presence:
Status sync gives agents flexibility to handle interactions from either system
- Lightning-optimized:
Updated components designed to make the most of the Sales Cloud Lightning Experience

ABOUT GENESYS

Genesys® powers more than 25 billion of the world's best customer experiences each year. Our success comes from connecting employee and customer conversations on any channel, every day. Over 10,000 companies in more than 100 countries trust our #1 customer experience platform to drive great business outcomes. Genesys on-premise and cloud solutions are built to be fluid, instinctive and profoundly empowering. Combining the best of technology and human ingenuity, we work the way you think.

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