

# Integration with Salesforce

from Interactive Intelligence®

## Streamline communications to better service your customers

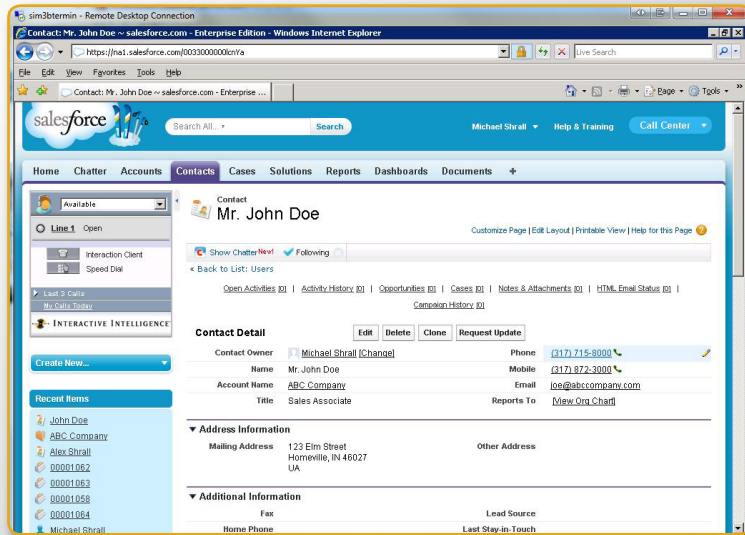
### Salesforce integration overview

The customer experience is best when it's seamless – which is why businesses are taking advantage of the ability to manage customer interactions directly within Salesforce.

By embedding call control, agents can make, take and manage calls with features for click to dial, dial from workgroup, call pickup, disconnect, hold, transfer, and conference. Agents can also manage their presence status, service multiple interactions simultaneously, have customer records automatically populate upon contact initiation, and assign wrap-up and account codes – all from within the Salesforce environment.

Bottom line, with Salesforce putting everything at an agent's fingertips, efficiency takes over. And the customer experience becomes superior.

**Enhance the customer experience.** There's an increased importance being placed on the customer experience as companies look for ways to better attract and retain customers. By using embedded call controls, viewing expert resource presence information, and having customer records populate automatically across all media types, agents are able to consistently respond to customer inquiries in a faster, more precise fashion. Agents also avoid having to ask customers to repeat basic information, one of the best steps any business can take toward improving the service process.



Customer service precision... integrated screen pop, presence, and call control in the Salesforce desktop environment

### Key features

- Embedded softphone with call controls
- Click-to-dial
- Dial from workgroup
- Presence management
- Intelligent routing
- Configurable screen pop for all media types
- Activity creation and auto association
- Wrap-up and account codes
- Enhanced integrated reporting
- Productized solution built on Microsoft's .NET framework
- Automatic synchronization of Interaction data and Salesforce activities
- Certified by Salesforce and published on AppExchange

### Key benefits

#### Enhanced customer experience

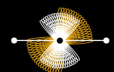
- Less time required of customers
- More precise agent responses
- No need to repeat information
- Consistent experience across media channels
- Better First Call Resolution (FCR)

#### Greater efficiency

- Fewer clicks
- Fewer duplicate tasks
- Quicker access to specialized resources
- Faster access to information
- Better data for fine-tuning processes

#### Ease and flexibility of deployment

- Minimal effort to implement and maintain
- Agents can be anywhere
- Use of multiple types of endpoints



INTERACTIVE INTELLIGENCE®

## Interactive Intelligence software prerequisites

- Interactive Intelligence Customer Interaction Center® (CIC) 3.0 or later
- Interaction Client® not required, but can run side-by-side Salesforce client
- Internet Explorer, version 6.0, 7.0 or 8.0, or Mozilla Firefox 3.5.X or 3.6.X., running in a Windows-based operating system; refer to Salesforce online help for the optimal browser configuration settings
- .NET Framework, either both versions 2.0 and 3.0, or just version 3.5, on client machine

## Client login support

- Support remote workers as well as those in an office:
  - Workstation
  - Remote workstation
  - Remote number
  - SIP soft phone

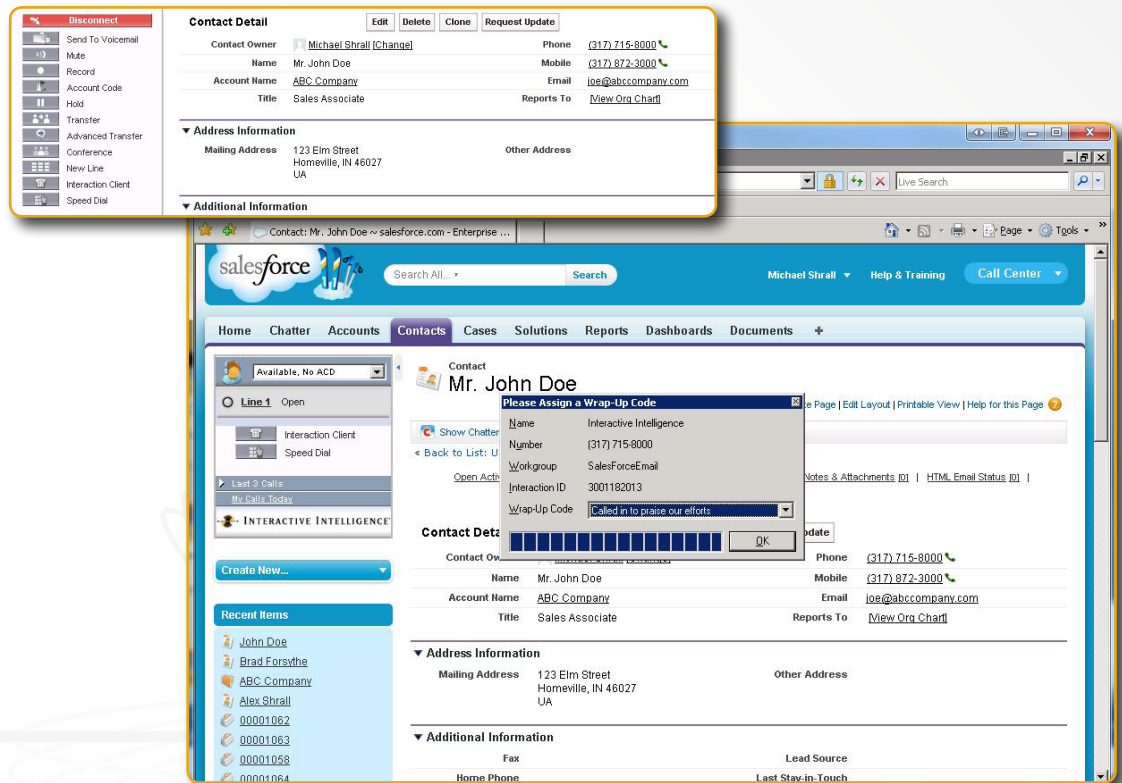
## Leverage CIC's Interaction Center Platform® technology for call processing

- No additional voice boards or equipment required; actual handling of calls takes place on the CIC platform

## Upcoming features

- Access to full Interaction Client from within Salesforce Dialer integration
- Speed dial
- Enhanced transfer/conference

**Increase efficiency.** Doing more with less is another key theme these days for service-oriented organizations. By tightly integrating the customer interaction functionality from Interactive Intelligence, agents using Salesforce are empowered to perform tasks more efficiently. Using wrap-up codes and enhanced integrated reporting makes service processes even more efficient.



Agents are more efficient with integrated features for click-to-dial and wrap-up codes

**Deploy quickly and easily.** Consistent with the Salesforce model, Interactive Intelligence's integration requires minimal IT resources to implement and maintain – it's a fully productized offering based on industry standards, and has been certified by Salesforce. The combined solution offers the same deployment flexibility as standalone Salesforce and Interactive Intelligence products, in that agents can be anywhere (HQ, remote office or at home) and utilize whatever endpoints are preferred and available to them. That makes the Salesforce integration from Interactive Intelligence a quickly obtainable, low-risk high-reward proposition.

# INTERACTIVE INTELLIGENCE®

Interactive Intelligence offers unified business communications solutions for contact center automation, enterprise IP telephony, and business process automation, based on our open standards, all-in-one software suite. More than 4,000 organizations worldwide currently benefit from our on-premise solutions and cloud-based Communications as a Service (CaaS) offerings, including value-added services for software, hardware, implementation, consulting, support and education.

At Interactive Intelligence, it's what we do.

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