



b+s Connects for Salesforce UCM Edition

01 | 03

Salesforce Integration for Cisco's Unified Communications Manager: collaborate with customers and coworkers inside of Salesforce

When handling telephone calls, employees must be able to work within a single application that combines call control with easy access to customer information, while also providing clear navigation options.

Bucher + Suter meets these needs by providing an easy-to-use, pre-packaged solution built upon standard, open interfaces. By utilizing our integration, companies can improve call management and enable feature-rich telephony functionality in the Salesforce CRM GUI.

Employees can answer, transfer, and conference telephone calls within the b+s Connects gadget while remaining within the Salesforce application.

The solution provides full voice CTI functionality as well as popping customer information into the Salesforce GUI with the arrival of a telephone call—a convenient time saver.

b+s Connects for Salesforce - UCM Edition provides a click-to-dial feature allowing users to type a name or phone number into the gadget, which the system then searches for a matching contact in Salesforce. Users can also click-to-dial on any telephone number in Salesforce. Once a call is made, clicking on another telephone number will launch a consultation call, which can then be transferred or turned into a conference call.



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02 | 03

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PRODUCT HIGHLIGHTS

- Flexible screen pops with most relevant customer data
- Seamless integration with Salesforce GUI facilitates use
- Pre-integrated solution is fast, easy, and increases ROI

KEY BENEFITS

- Effective employee communication increases customer satisfaction, and is driven by fast, effective agents and superlative service. These are the building blocks of brand loyalty development.
- Configurable screen pops mean that agents get the right information, immediately and can communicate effectively with other agents. This systematic communication streamlining decreases task resolution time and increases ROI
- Ease-of-use increases agent efficiency and decreases fatigue and burnout by unifying the visual interface and environment workflow

The screenshot displays the Salesforce Lightning Service Console interface for a contact record. The contact is identified as Mr. Bill Steiner, associated with the account Atlantic Sports and phone number +41798149858. The interface is annotated with blue callouts:

- Pop-up matched contact:** Points to the contact header area.
- Incoming call:** Points to a call activity entry in the 'Call Activity' section.
- Matched contact:** Points to the contact information within the call activity details.
- Call control buttons:** Points to the call control icons (mute, hold, end call) at the bottom of the call activity.

The interface also shows a 'RELATED' section with 'Details of this contact', an 'ACTIVITY' section with an email composition form, and an 'Activity Timeline' showing a call on 2017-12-01 at 16:01:49.

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03 | 03

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GENERAL PRODUCT FEATURES

- Auto login
- Contacts are searchable by typing in part of a name or number inside gadget
- A pop-up window outside the gadget allows agents to view and answer calls even when Salesforce is minimized or hidden
- Support for both the Salesforce Classic and Lightning modes

VOICE FEATURES

- Call control: answer, hold, conference, retrieve, and hang-up
- Click-to-dial inside of gadget with search and edit capability
- Click-to-dial within Salesforce
- Transfer
- Call details logged inside of Salesforce
- Activity comment field inside of the gadget
- Speed dial buttons

