

## CRM Integration for Cisco Finesse

b+s Fusion CRM is a fully-configurable, out-of-the-box integration of the Cisco Contact Center and CRM systems—like Microsoft Dynamics CRM or Salesforce—that gives agents the ability to use data from CRM systems from within the Finesse GUI.



### Easy-to-use features -> big productivity boost

**CRM Look-Up** **Call Activity Log** **Click-To-Dial**

When a phone call arrives, the gadget automatically displays a link to the customer's CRM record within the Finesse GUI. If an agent viewing this link needs to more detail they can click on it to display the full record in the CRM.

Agents can also see a customer's interactions history, and can create new activities without leaving Finesse. Since agents can track the customer's journey they know when the customer called, to whom they spoke, and their preferred communication channel. The gadget pulls this information from the CRM and displays it in Finesse

The agent can also search for things like CRM customer contacts, leads, and accounts by typing in part of a name or phone number and then clicking to dial.

### Product Highlights

- Seamless and easy-to-install integration into the Finesse desktop
- Provides agents access the CRM without leaving Finesse

### Key Benefits

- Pull CRM data into Finesse to enable features such as click-to-dial, click-to-screen pop, and directory searches
- Supports CCE, PCCE, and CCX
- Simultaneously connects multiple CRMs
- Pre-integrated solution provides rapid and reliable deployment and lowers implementation & maintenance costs



Preferred  
Solution  
Partner



b+s Fusion for Finesse CRM Pro

Enter contact name or number

DynamicsOnline DynamicsOne

Search "ha"  Search "bla"  Search "Beispiel"

▼  Sven Eberhardt (Beispiel) (Contact) DynamicsOnline

Contact Activities Create Activity

All available information for current

Firstname:	Sven
Lastname:	Eberhardt (Beispiel)
Fullname:	Sven Eberhardt (Beispiel)
Email address 1:	someone_1@example.com

>  Michael Krause (Beispiel) (Contact) DynamicsOnline

>  Nurhan Güran (Beispiel) (Contact) DynamicsOnline

>  Contoso Pharma (Beispiel) (Account) DynamicsOnline

Agent view of CRM customer data from within Finesse

b+s Fusion for Finesse CRM

pat

Salesforce DynamicsSaleslab

Call "41319175260"  Call "41319175222"  Search "pat"

Phones	Display Name	Type	Instance
> <input type="button" value="Phone"/>	Patrick Steiner (sample)	Contact	DynamicsSaleslab
▼ <input type="button" value="Phone"/> <input type="button" value="Mobile"/>	Patrik Riesen	Contact	DynamicsSaleslab

Contact Activities Create Activity

Type	Topic	Created on	Creator	Link
Email	Feature Request	3 Mar 2016 13:56:47	Joe Smith	<a href="#">Edit in CRM</a>
Phonecall	Call 2016-02-08 11:03:15	8 Feb 2016 11:03:15	Joe Smith	<a href="#">Edit in CRM</a>
Phonecall	Call 2016-02-08 10:31:09	8 Feb 2016 10:31:09	Joe Smith	<a href="#">Edit in CRM</a>
Phonecall	Call 2016-02-08 10:26:52	8 Feb 2016 10:26:53	Joe Smith	<a href="#">Edit in CRM</a>
Phonecall	Call 2015-11-09 16:32:57	9 Nov 2015 16:32:57	Joe Smith	<a href="#">Edit in CRM</a>

Agents can search CRM records from inside of Finesse and click-to-dial