



IP Office Contact Center Customer Relationship Management Integration

Integrate Avaya IP Office Contact Center with your Salesforce.com or SAP CRM system

With the Avaya CRM integration packaged application for Salesforce and SAP, Avaya integrates real-time communications capabilities with CRM software to improve agent productivity, enhance customer service and streamline the overall customer journey. Users can click to call directly from contact lists and CRM records.

For incoming or outgoing calls, a desktop notification displays contextual information about the customer and gives the user the option to:

- hold or release the call
- transfer the call to an available colleague via a presence-enabled contact list
- bring a subject matter expert into the customer conversation by means of a conference call
- enter notes during the call
- generate an activity record in the CRM database that includes automatically populated call detail
- view call history and missed calls in Salesforce; also view call history within SAP when supported by the SAP GUI configuration

Key Customer Benefits

Improves productivity through time saved not having to search for customer contact details, create customer activity records, or manually dial numbers. Users click to dial customers, colleagues and partners directly from customer records (including client case and customer opportunity records), and sales leads. A log of inbound and outbound calls can be generated automatically within Salesforce. Missed calls, call duration, and annotated notes are also included within the Salesforce client record for easy retrieval at any time.

Enhances customer service by presenting the customer number or name and company within the CRM interface. Users can greet the customer by name, click to open the customer record, and access relevant customer information, facilitating more personalized, well-informed customer interactions. And, because users can see their colleagues' presence information, calls can be transferred to available personnel from the desktop, creating a seamless handover for customer interactions.

Additional Resources

[IP Office Contact Center
Installation Task Based Guide](#)

Requirements

- IP Office Contact Center 9.1.6 or higher
- Salesforce.com
- SAP CRM7
- Additional out-of-the box CRM connectors planned for future IP Office Contact Center releases

Learn More

For more information on how Avaya CRM Integration can help your organization gain competitive advantage by integrating business applications and processes with your existing communications systems, contact your Avaya Account Manager or Authorized Partner and visit us at www.avaya.com.

Key Salesforce Integration Features

- Deploy fast with minimal customization leveraging prepackaged, out-of-the-box connectors.
- Click to Dial from contact lists and customer records that contain phone numbers.
- Automatic Call Logging of inbound and outbound calls stores call history within the client record, including call duration and missed calls.
- Call Annotation allows a user to enter personal notes during a call and store the notes in the record along with call detail such as time and date.
- Call Duration automatically captures conversation time for inbound and outbound calls, rounds it to the nearest minute, and stores the information in the customer record.
- Desktop Notification Service delivers a PC tray toast pop-up that presents incoming and outgoing calls the user makes or receives from associated devices.
 - Displays caller name and company information retrieved from the CRM database
 - Offers click to open for CRM records related to Caller ID, such as a contact record, opportunities/orders list, or a notes/activity record containing information from previous calls with the customer.
 - Enables remote phone answer or redirect to alternative number directly from the PC.
 - Provides call handling options including: answer incoming call, release call before or after answering, initiate call, place call on hold, retrieve held call, transfer call to another contact or telephone number, view call history and list of missed calls.
- Presence-enabled Contacts List lets users create a list of frequently used contacts for quick dialing or call transfer. Telephony presence can be added where available.
- Missed calls icon in PC system tray indicates missed calls.
 - Click icon to display missed calls within the activity view of CRM or short list.
 - Return calls using click to call.
- Choice of device for inbound and outbound call handling within the CRM application.

About the SAP CRM Integration

SAP leverages an integrated communications interface (ICI), a SOAP and XML web service oriented interface, that is designed to support the integration of the SAP CRM Interaction Center WebClient with IP Office Contact Center's voice communications channel. Avaya encourages customers to discuss their SAP CRM integration telephony requirements with their Authorized Avaya Partner to help them fully achieve an integrated and productive agent desktop environment.

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