

# CRM Connector

Integrating communications capabilities with CRM software to improve productivity and enhance customer service

## Benefits

- Improves the customer experience
- Allows faster, more accurate and more personalized service
- Increases agent productivity and reduces costs



Customer Relationship Management (CRM) helps you manage your customer relationship to be able to improve the customer experience and increase the lifetime value of your customers. Whether you use Salesforce.com, Microsoft Dynamics 365, Zendesk, Oracle CX, ServiceNow, Zoho CRM or any other CRM product, it is imperative that you integrate these business applications and processes with your existing communications systems, in order to improve customer service and set yourself apart from your competition. Mitel Professional Services offers CRM Connector for MiContact Center to drastically increase your return on investment, improve the customer experience and exceed your business outcomes.

## Mitel CRM Connector

Mitel CRM Connector for MiContact Center integrates communications capabilities with your CRM software to improve the productivity of your agents, reduce costs and enhance the customer experience.

Using CRM Connector agents can click to dial, have screen popups with contextual information and take advantage of many other innovative features to increase their productivity and enhance the customer service they provide.

## Designed for MiContact Center

Mitel CRM Connector supports MiContact Center Business and MiContact Center Enterprise. We support the following leading third-party CRM products:

- Salesforce
- Microsoft Dynamics 365 (CRM)
- Zendesk
- Oracle CX (B2B/B2C)
- ServiceNow
- Zoho CRM

And our engineers have the expertise to support many other CRM products. Contact Mitel Professional Services to inquire if your CRM product is supported.



## Mitel CRM Connector – Features and benefits

### Web User Interface

The CRM Connector for MiContact Center brings CTI and Contact Center functionality into the CRM web user interface by means of an embedded web application.

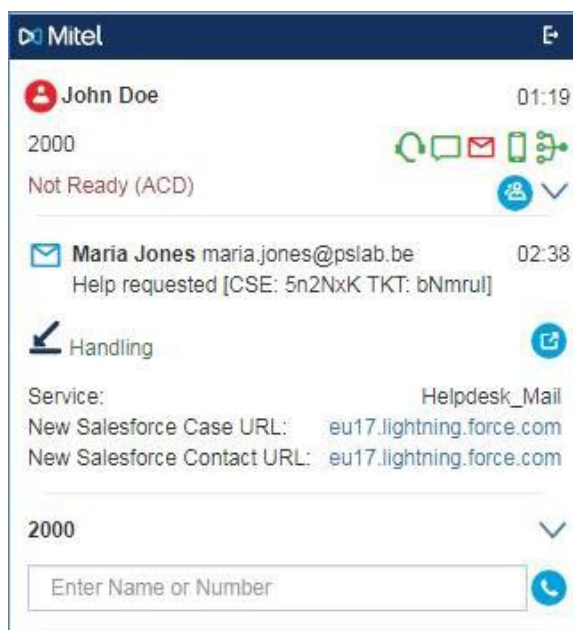
### CTI

Call monitoring and control are available from the CRM Connector's user interface.

- Incoming call detection
- Real-time update of the current call state.
- Basic call control: make call, answer, hang up, hold, retrieve.
- Advanced call control: multiple calls, transfer, conference.

### Multimedia Support

The CRM Connector can recognize and display multimedia sessions, providing support for the most common CRM integration features such as screen popup and call logging.



Only one action is allowed on non-voice sessions (except SMS) : open the item in Ignite.

The corresponding button opens Ignite in a new tab in the agent's browser if necessary, and then selects the multimedia session in the inbox of the agent.

All actions on the session are performed from within Ignite: Accept, Reject, No Reply, Junk, etc. Supported multimedia sessions are:

- Email
- Chat
- SMS
- Open Media

### Search

Calls can be initiated or transferred by entering a partial number or name in the search field and selecting the destination from the matching CRM objects or MiContact Center contacts.

### Click to dial

After installation, all phone numbers on CRM pages (contacts, etc.) are converted to hyperlinks.

Clicking on a phone number initiates an outgoing call to this number, from the phone currently used by the agent (desk phone or softphone in Agent application).

### Caller identification

At the beginning of an incoming or outbound call with the agent, the caller or called party is identified through an automatic lookup into the CRM contacts list based on the remote party phone number or IVR data.

IVR data is also displayed in the CRM Connector.

## CRM Compatibility

Functionality		SFDC	CRM 365	Zendesk	Oracle CX B2C	Oracle CX B2B	Service Now	Zoho CRM
Searching by number or name		✓	✓	✓	✓	✓	✓	✓
Caller identification		✓	✓	✓	✓	✓	✓	✓
Screen popup		✓	✓	✓	✓	✓	✓	✓
Click to dial		✓	✓	-	-	✓	✓	✓
Call association		✓	✓	✓	✓	✓	✓	✓
Call logging	Manual	✓	✓	✓	✓	✓	✓	✓
	Automatic	✓	✓	✓	✓	✓	✓	✓
	Templates	✓	✓	✓	✓	✓	✓	✓
	Custom properties	✓	✓	-	✓	-	✓	✓
SFDC Omnichannel	Presence	✓	-	-	-	-	-	-
MiVoice Call Recording integration		✓	✓	✓	✓	-	✓	✓
Mitel Interaction Recording integration		✓	✓	✓	✓	-	✓	✓

### Screen popup

When an incoming call is presented to the agent, the CRM Connector automatically pops up a corresponding CRM page in the main web interface.

The popup mechanism is parametrized with call- and script-related fields, so it can be used to display either the contact page of the caller or virtually any other CRM page.

### Agent status

The CRM Connector provides monitoring and control of the agent status values, such as the following.

- Ready for Voice
- Not Ready for Voice
- Entry of Not Ready Reason
- Clerical time

### Call qualification

During a call, the agent can associate one or more Call Qualification Codes to the current call.

### Call logging

For the duration of a call, the agent can directly add an entry to the call log associated to the CRM contact.

### Salesforce user experiences

The CRM Connector for MiContact Center Enterprise and MiContact Center Business is compatible with all variants of the Salesforce user interface:

- Classic, Console, and Lightning

## Mitel Professional Services

Mitel's professional services portfolio helps you maximize your investment in Mitel's world-class communications solutions. At Mitel Professional Services, we recognize that results don't just happen overnight. Your journey starts with careful prioritization and planning before you can get to meaningful solution design and deployment. Our service delivery methodology is rigorous enough for your most sophisticated requirements and flexible enough to provide the service level you need. Mitel Professional Services are sold via Mitel authorized partners, enabling you to achieve your business objectives with low rollout risk and using advanced features with confidence.