PureConnect for Salesforce

Use the open and extensible capabilities of two systems for streamlined communications

**Key features**

**Enhanced customer experience**

- Consistent experience across media channels
- Screen pop to speed agent responsiveness
- Pop to a specific record based on ANI
- Pop to a specific record based on IVR data entered by the customer
- Pop to an empty record (lead, case, contact)
- Pop to an empty record pre-populated with IVR data entered by the customer
- Pop to a custom VisualForce page for a custom support process
- No delays from accessing multiple systems
- Access to prior customer interaction history
- No need to repeat information

**Greater sales and service efficiency**

- Single sign-on
- Side-by-side usage with other PureConnect clients
- Smaller footprint
- Tear-off client (Service Cloud only)

**Ease and flexibility of deployment**

- Minimal installation and maintenance
- Browser independence
- Users can be anywhere
- Built, maintained, and supported by Genesys
- No middle-ware vendors
- Security reviewed by Salesforce and published on the AppExchange

**Rules-driven screen pop**

Use gathered data such as Caller ID to customize and drive a screen pop of the associated Salesforce object (contact, lead, case) for both inbound and outbound interactions. The screen pop could be a standard Salesforce page, a Visualforce page, or a new record page with pre-populated data from the caller’s input.

**Automatic activity creation**

Create a Salesforce activity for any interaction handled by the agent. This includes information such as connection time, agent name and agent comments. The activity can be associated to Salesforce objects for unified reporting purposes.

**Presence management**

Get custom-configurable, real-time presence management along with the ability to enable as many status settings as your organization needs. Gain a more accurate assessment of agent activity and more efficient staffing.

**Detail reporting**

Eliminate the need for agents to re-enter information via integrated interaction detail reporting within Salesforce activities. The benefit is greater insight into agent performance, increased productivity and accurate data.

**Key Features**

**One unified desktop**

Manage, track, and queue multichannel interactions (calls, callbacks, web chats, generic objects, ACD-routed email and Salesforce email-to-case interactions across systems with a single agent desktop application. By embedding call control, users can make, take, and manage calls—with features for click-to-dial, call pickup, disconnect, hold, transfer, and conference. Click to call directly from phone number fields in contacts, leads, activities, and accounts.

**Easy to maintain**

PureConnect for Salesforce is an HTML5 application hosted in Amazon Web Services and delivered to users' browsers. This state-of-the-art delivery mechanism frees you from the hassles of planning for software upgrades. And administrators won’t have to spend weekends deploying service updates. As new features and updates are released, they immediately become available for your agents to use.

**Improved agent utilization**

The Interaction Dialer® plug-in adds preview and predictive dialer capabilities through PureConnect to automate sophisticated call campaigns for Salesforce. Agents can also log on/off to Interaction Dialer campaigns, schedule callbacks and disposition calls, and request a break through the PureConnect for Salesforce interface.
Software prerequisites

- PureConnect
- Supported web browser