



**Avaya CRM Connector for
Salesforce Release 2.0**

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Summary

As a global leader in enterprise communication systems Avaya is committed to providing its customers with leading edge solutions and is offering integrations to the different CRM solutions available in the marketplace.

With the recent improvements to browsers, push technologies and HTML5, many CRM vendors moved from old desktop based CTI (Computer Telephony Integration) to a web based thin client approach. In addition, with the changing telephony landscape, we also needed to accommodate two types of CTI, one with the traditional on-premise solutions, the other with cloud telephony.

Salesforce Integration

These integrations are based on the Salesforce provided Open CTI interface toolkit being used to CTI enable the Salesforce application for the Avaya environment. The integrations between Salesforce.com and Avaya are server side communicating with Salesforce through a browser.

Today, Avaya is making it easier for contact center customers to connect to Salesforce CRM solutions with a new connector that offers greater flexibility for integration and implementation along with a richer feature set. The new Avaya CRM Connector 2.0 for Salesforce will help businesses eliminate many of the unnecessary inconveniences that cause high-effort customer experiences and can incur significant costs to companies.

The combination of Salesforce and the Avaya Contact Center solutions, such as Oceana, Call Center Elite, and Proactive Outreach Manager allows companies to collect, streamline and organize vast amounts of information that can be fed back into the business and used across sales, marketing, product development and management as well as service. The result is that companies can now gain greater insight into customers' needs and desires, and can quickly close the gap between planning and delivery.

The Avaya CRM Connector R2 for Salesforce is available today as a voice only integration with Call Center Elite, which delivers a user interface providing full telephony and Agent State control of an existing station.

Value Proposition

Using Avaya CRM Connector 2.0, contact center agents can place, receive, and transfer telephone calls with complete contact-sensitive access to prospect and customer data maintained in the Salesforce database. With the Avaya CRM Connector 2.0, Customers can:

- Provide a single user interface for the Salesforce application and embedded Avaya telephony control.
- Support faster, more accurate and more personalized customer service, while increasing agent productivity and reducing costs.
- Enable agents to use their Salesforce Agent Desktop to change work modes and choose non-call activities that are tracked with Avaya reporting tools, e.g. after call work, and AUX codes like training, lunch or break.
- Rely on the integrated Salesforce and Avaya solution to efficiently track report and manage contact center operations.
- Seamlessly deploy a true thin client with no need for additional software installation on an agent's workstation.



- Rely on the integrated Salesforce and Avaya Oceana solution to efficiently deliver non-voice interactions.
- Leverage agent states from the contact center without needing to poll AES.
- Fewer clicks for an agent to complete their work, thereby lowering an agent's time per call.

Capabilities and Features

Salesforce interfaces supported:

- 1- Standard
- 2- Lightning
- 3- Console

Voice (applies to CM/Elite and Oceana)

- Full Softphone control:
 - Make Call
 - Answer
 - Hold
 - Transfer
 - Conference
- Full ACD control:
 - Available (auto in/manual in)
 - Auxiliary
 - After Call Work
- Click-to-Dial
- Reason Codes:
 - Supports AUX and Logout
 - Double digit AUX codes
 - Saved in CM/CMS
- Screen Pop:
 - UUI (up to five fields)
 - Collected Digits to UUI
 - ANI
- Call Logs

Outreach (applies to Elite/POM Integration)

- Outreach Methods:
 - Preview
 - Progressive
 - Predictive
- Blended:
 - Mixes traditional Inbound with Outreach
 - Blending by session, not call
- Outreach-only Option
- Outreach Screen Pop:
 - Destination Number
- Call Logs



Omni-channel (applies to Oceana digital channels only)

- Screen pop from Context Store
- Customer Journey
- Web Chat:
 - Live chat
 - Canned responses
 - Transfer to service
- Email:
 - Reply, Reply All, Forward
 - Full reply with or without quote
 - Attachments
- SMS:
 - Live chat
 - Canned responses
 - Transfer to service
- Transaction Logs:
 - All channels
 - Stores metadata
 - Saved in Salesforce Activity Table

CRM Connector 2.0 Requirements

Features or Technologies	Requirements
Breeze 3.3+	General Purpose Large Supports 1000 users per node (separate cluster needed)
Avaya Aura® Core	CM: 6.3.14 + SM: 6.3.17 + SMGR: 7.0.1 + AES: 6.3.3 +
Proactive Outreach Manager	POM 3.0+
Oceana	Avaya Oceana 3.3+
Contact Center software enablement (Optional)	Avaya Aura® Call Center Elite 6.3+ Proprietary Agents States features enabled

High Level Architecture

The CRM Connector 2.0 has the following core elements:

- **AES 3rd Party Call Control snap-in:** in support of AES integration to allow 3rd party call control capabilities.
- **Inbound Endpoint Controller (IEC) snap-in:** in support of web browsers requests to manage and expose endpoint, agent, and call related state machine information.
- **Salesforce/Communication Manager snap-in:** in support of Avaya Aura® Communication Manager integration into Salesforce CRM.

User Interface Localization

Language	Abreviation
English	EN
Dutch	NL
Japanese	JA
Latin American Spanish	ES-XL
Thai	TH
Simplified Chinese	ZH-CN
German	DE
French	FR
Brazilian Portuguese	PT-BR
Italian	IT
Korean	KO
Russian	RU

High Availability/Failover Considerations

High Availability:

Avaya CRM Connector 2.0 is a set of snap-ins is a cluster of 1-5 nodes with each of the nodes having identical resources. To support High Availability, CRM Connector uses the Avaya Breeze platform and data grid and it is engineered to be highly available and to survive the failure of a single node while maintaining the ability to continue service and maintain throughput and quote capacities without the loss of data. If through a planned or unplanned action a node is no longer available to a cluster, the cluster will compress into the remaining nodes until the affected node becomes available again.

Geo Redundancy:

CRM Connector geo redundancy is an architecture that you can configure to enhance high availability. Using geo redundancy, you can have two Breeze clusters in active/active mode. To ensure a successful failover, you must add the two clusters to the same System Manager. CRM Connector supports geo redundancy with up to 2 clusters only. All requests to CRM Connector are routed through a third party load balancer that is common between the clusters. The load balancer can communicate to each cluster at any time.



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