



# The Five9 Intelligent Contact Center Integrates with CRM

Integrate your CRM system with the Five9 cloud contact center solution to deliver better customer experiences while optimizing your business processes.

### The Customer Service Dilemma

Most of today's contact centers are using Customer Relationship Management (CRM) solutions to capture customer information, tickets – which is great. But, contact center technologies and CRM solutions are deployed in siloes and do not have a way to work with each other to provide a seamless customer experience.

Agents have to work with several systems to have the right information in place when needed. This is a very time consuming exercise. The result: A painful working environment for agents and frustrated customers due to long calls, poor customer service – and even simple tasks can become challenging and time consuming.

### Eliminate Siloes

Five9 offers out-of-the-box integrations with leading CRM solutions such as Salesforce, Microsoft, ServiceNow, Oracle, and Zendesk as well as custom-built solutions.

When using the Five9 cloud contact center solution, telephony controls are embedded into your CRM application, converting them into a more powerful and productive engine for sales, marketing, customer service, support, and ticket management.

Businesses are able to create a seamless and powerful combination of telephony capabilities and CRM that works better together to deliver customer history and information at the right time with every inbound or outbound interaction.

### Make it Easy for your Agents

Agents are now able to click-to-dial from their well-known CRM interface while the most important call details are automatically captured in the existing CRM system.

This increases agent productivity, enhances the user experience, ensures a better customer service and gives organizations a real competitive advantage.



### Five9 and Salesforce Integration Features

- Full support for Lightning Experience with Sales Cloud and Service Cloud
- CTI integration through open CTI or Open CTI for Lightning Experience
- Click-to-dial functionality
- Synchronization of customer lists and data
- Call history and recording
- Single sign-on

### Five9 and Oracle Integration Features

- Route calls, emails, chats to the right agent, based on availability
- Match call information with Oracle Service Cloud data
- Enhances pre-call routing for open incidents or highvalue callers
- Deploy work-at-home agents with only a PC, high-speed Internet connection, and USB headset
- Single sign-on

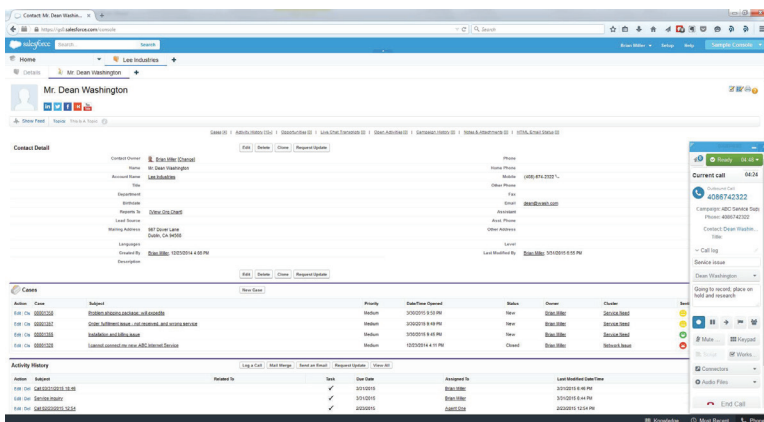


Figure 1: Single desktop in Salesforce Service Cloud Console view, with undocked mode for a free-floating adapter



# How it Works



Five9 enriches Salesforce CRM by delivering powerful telephony features directly to the familiar Salesforce desktop. Five9 provides computer telephony integration by leveraging Open CTI or Open CTI for Lightning experience, linking the Salesforce solutions to the Five9 platform. The pre-built integration includes features like screen-pop, click-to-dial, voice-mail, Interactive Voice Response (IVR) scripting and call recording, to empower agents to make each interaction a success.



The combination of Five9 and Oracle creates a powerful customer service platform, allowing businesses to easily maximize every customer interaction. The pre-built integration connects Oracle Service Cloud with Five9 capabilities, giving companies the ability to interact with customers via calls, emails, and web chats from one desktop. The solution is easily managed through a single, multichannel administrative environment.

## zendesk

The Five9 Integration for Zendesk provides Computer Telephony Integration (CTI) directly to the Zendesk customer service platform which enables call management and ticket handling all from one screen. Five9 provides improved agent productivity by offering the customer's history and the dialer functionality as an integrated experience within the Zendesk application.

Agents are enabled to get a complete view on each customer before getting on the phone, so that they understand the customer's need and are able to provide better customer service.



The Five9 Plus Adapter for Microsoft Dynamics CRM provides CTI capabilities directly to the Dynamics desktop giving businesses the ability to interact with their customers via blended channels. Agents no longer need to switch between different applications and the Dynamics desktop. Agents enjoy a single, streamlined omnichannel desktop that improves productivity and satisfaction.

## servicenow

Thanks to the seamless integration of the Five9 cloud contact center solution, businesses are able to provide their agents a powerful, modern and intuitive interface. By combining Five9 and ServiceNow, organizations can provide the kind of support that drives customer satisfaction and helps to build a lasting relationship with customers. Screen-Pops blend directly into the ServiceNow desktop to give agents all the information they need to deliver a great customer service experience.

### Custom CRM

If you use a custom, homegrown CRM solution, Five9 offers an easy-to-implement integration option to any web-based inhouse CRM.

The Five9 Agent Desktop Toolkit (ADT) offers a rich, extensible framework of REST API's, reference UI, and other tools to build solutions that power agent experiences and business results in turnkey and custom environments. Leverage the power of cloud contact center solutions while maximizing existing investments – with Five9.

**To schedule a live demo or find out more information, visit [www.five9.com](http://www.five9.com) or call 1-800-553-8159.**



### Five9 and Zendesk Integration Features

- One-Click actions to view & create tickets
- Route calls to the right agent, at the right time based on availability
- Automated ticket creation
- Clickable link to the call recording from the ticket
- Automatic agent notification and configurable screen-pops of end-user and / or tickets

### Five9 and Microsoft Dynamics CRM Integration

- Automatic agent notifications and configurable "screenpops" of customer interactions
- User-friendly telephony capabilities in a single agent desktop
- Streamlined deployment of remote agents
- Automated record logs of customer details and interactions for reporting and historical reference
- Modern user interface, intuitive work-flow, and advanced call controls

### Five9 and ServiceNow Integration

- Embedded telephony capabilities
- Screen-Pops for inbound customer interactions
- Record logs of customer interactions for service continuity and reporting
- Single Sign-On
- Apply routing rules across all voice channels from a single administrative desktop

### About Five9

Five9 is the leading provider of cloud contact center solutions, bringing the power of the cloud to more than 2,000 customers worldwide and facilitating more than five billion call minutes annually. Five9 helps contact centers increase productivity, boost revenue, and create experiences customers will love.

For more information visit [www.five9.com](http://www.five9.com) or call 1-800-553-8159.



4000 Executive Parkway, Suite 400  
San Ramon, CA 94583  
925.201.2000

[www.five9.com](http://www.five9.com)

Five9 and the Five9 logo are registered trademarks of Five9 and its subsidiaries in the United States and other countries. Other marks and brands may be claimed as the property of others. The product plans, specifications, and descriptions herein are provided for information only and subject to change without notice, and are provided without warranty of any kind, express or implied. Copyright © 2019 Five9, Inc.

2019\_K\_2018