

# SUPERCHARGE SUPPORT

## WITH GENESYS CLOUD CX AND SALESFORCE

### Genesys Cloud CX and Salesforce - a dynamic duo

Integrating contact center software with CRM systems should be fast and easy. Genesys Cloud CX connects to Salesforce seamlessly via a pre-built integration. You get powerful features that work out of the box as well as configuration options so you can customize as needed.

#### Streamline CX processes with an all-in-one platform

Switching between systems takes time and effort. Inserting Genesys Cloud CX — and its vast toolkit of capabilities — into the familiar Salesforce interface streamlines the employee experience and empowers them to create more holistic customer journeys.

Create a company culture that attracts and retains the best employees with built-in workforce engagement management (WEM). And make their jobs easier with automated workflows, native artificial intelligence (AI) and third-party integrations.

#### Automate routine tasks and workflows

Save time and improve data accuracy with pre-built automations - or build your own. Our client extension points connect with tools like Salesforce Lightning Message Framework and Service Console Events, enabling automation.

For example, you can sync agent status when an employee is in a Salesforce learning module. Or send conversation details to an Einstein bot to determine intent and surface Salesforce Knowledge articles. Salesforce developers can add more customized actions using our SDK.

#### Route to the right agents armed with the right tools

Use Salesforce data to route interactions to the best resource in real time. The capabilities of Genesys Cloud CX get smarter with every interaction, driving more proactive and personalized experiences.

Our lightweight integration puts the Genesys Cloud CX agent experience directly into the Salesforce user interface. Agents get access to single sign-on (SSO), presence, interaction controls, click-to-dial, screen pops, recordings, wrap-up codes, customer journey data, notes, queue stats, agent scripts and work schedule views.

#### Provide more proactive engagement

A key to driving customer loyalty is to anticipate their needs and offer alerts and solutions to potential problems before they arise. You can create, manage and view Genesys Cloud CX outbound campaigns in Salesforce with Campaign Management integration.

Proactively engage customers across channels with event-driven text messages, emails, outbound IVR, and predictive, preview and manual dialing. Use scripts to standardize agent communications and automatically record results in your Salesforce case or contact record activity log.

#### Add the all-in-one CX solution

Integrate the Genesys Cloud CX™ all-in-one cloud contact center solution into the Salesforce user interface, and start delivering more personalized, empathetic customer experiences at scale.

#### Streamline business processes

Give your agents all the customer context they need through a unified desktop. Automate routine tasks and workflows to save time, improve data accuracy and create better business results.

#### Make your CRM integration easy

Eliminate a complicated integration with an entirely cloud-based solution. Our Salesforce integration is simple to set up, manage and maintain — and it allows for limitless customizations.

# Salesforce call center integration you can count on

## Advanced screen pops

Know who's calling your business and why. Equip your agents with customized screen pops, journey data and relevant information from Salesforce. Use this customer information to truly personalize experiences.

## Workspace transfer

Don't make customers repeat themselves after a transfer. All relevant customer data attached to the Salesforce record travels with the transferred interaction, creating a more seamless customer experience.

## Automatic call logging

Create a Salesforce activity for every interaction. Automatically store all critical conversation attributes, including date, time, duration, agent name, call result, chat transcripts, notes, wrap-up codes and recordings.

## Agent scripts

Guide agents with convenient call scripts. Enable agents to offer standardized information, follow legal compliance guidelines and assist customers faster.

## Einstein integration

Leverage Salesforce AI to improve agent efficiency. Send conversation details to an Einstein bot to determine intent and surface Salesforce knowledge articles.

## Data actions

Add data-driven automation through self-service IVR applications. For instance, provide case status and options to reopen, update or transfer the case to an agent.

## Salesforce email routing

Unify reporting and improve workforce planning. Route Salesforce email interactions through Genesys Cloud CX in the same manner as your other interaction types.

## Voice services

Integrate voice into Salesforce with Genesys Cloud CX Voice services. Purchase, activation and setup of telephony service are easy and efficient.

## WebRTC softphone

Stay connected with your business no matter where you work. With our native WebRTC softphone, all you need is a simple internet connection and headset.

