PCS
PALITTO CONSULTING SERVICES

Infusionsoft Integration

Updated 3/2017

Content

Learn more about maximizing your ShoreTel phone system →

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About PCS

Business technology is our passion! Since 1996 Palitto Consulting Services (PCS) has been providing expert LAN/WAN, integration and custom software development services to the small and mid-sized business community. Our focus is integrating business systems to enable efficient business processes! Our team of experts is able to assist clients when determining which technology to purchase, how to use it, and how to optimize the technology for their unique business needs.

At PCS we do not have a "one size fits all" approach; we strive to provide customers with a custom solution tailored to best fit their unique business needs.
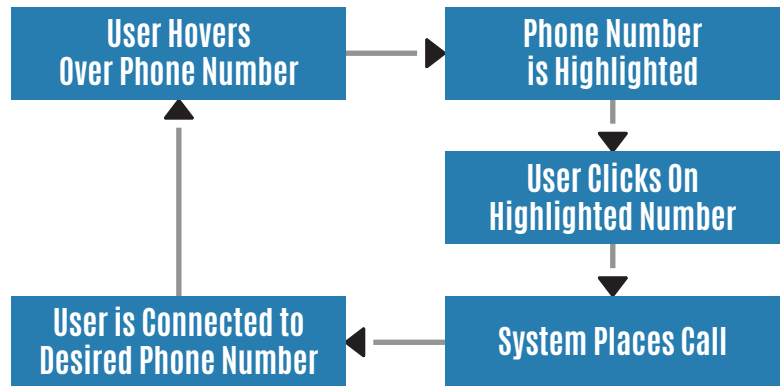
• PCS began working with the ShoreTel platform in 2002; we have over 50,000 hours of development time
• PCS team is ShoreTel Certified in both Installation and Support of Cloud, Premise, Contact Center, Mobility and Summit Practices
• All of our team members reside in Ohio
• Our project history ranges from one location to large deployments with multiple locations that span several states or countries

PCS Strives to be a World Class ShoreTel Partner!

Click to Dial

Outbound dial capability from Infusionsoft on customer service agent workstations. This will be accomplished using the PCS Universal Dialer application using our proprietary phone number sensing technology and custom integration into ShoreTel systems.

Click to Dial User Experience

User Hovers Over Phone Number → Phone Number is Highlighted → User Clicks On Highlighted Number → System Places Call → User is Connected to Desired Phone Number → (back to User Hovers Over Phone Number)

Universal Dialer

The Universal Dialer application is a client side application which provides the capability to hover over phone numbers in an application and click on them to dial. As users hover over a phone number, the system will automatically highlight the number and give options to dial the number on the user's extension Caller ID or System Dial-In Number.

PCS
330-335-7271

Users click on the highlighted region and immediately place a call. There are also features available to manage outbound caller ID options.

The universal dialer is a Windows application that runs on Windows clients. Other operating systems are not currently supported.

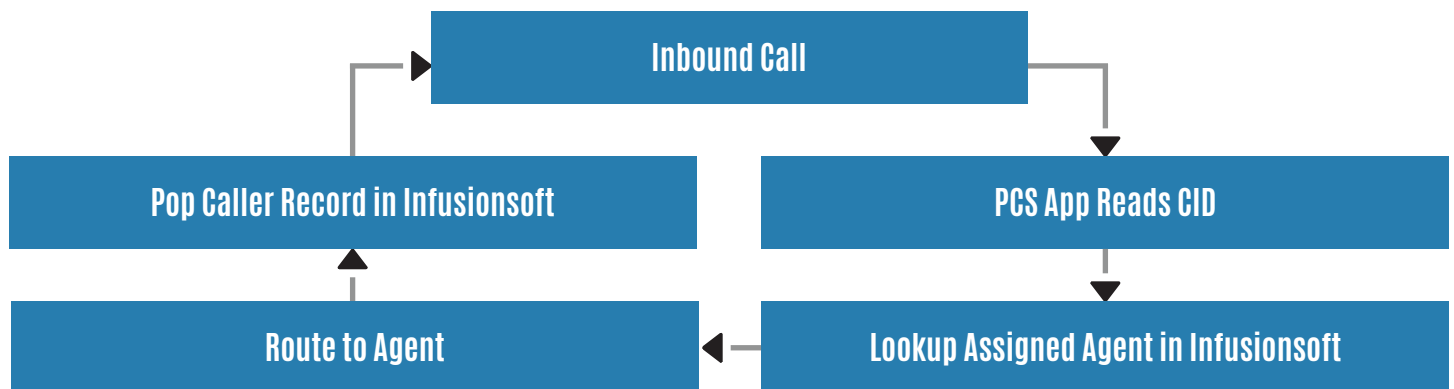Agent Desktop → Universal Dialer Application → Click to Dial → PCS Web Services
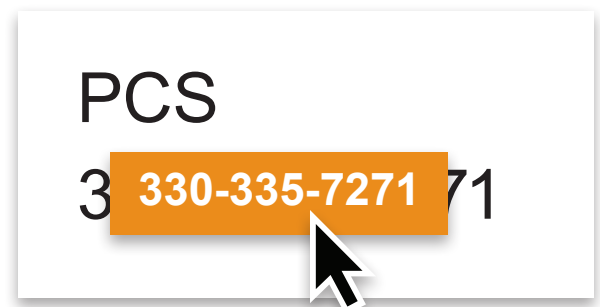
Webservice Option

Web service to initiate an outgoing call from Infusionsoft CRM. Client will call from a URL to initiate a ShoreTel call event.

Sample URL's:
• http://ShoreTelServer/DialNumber/?ext=445&number=93305551212&auth=x
• http://ShoreTelServer/DialNumber/?name=cuser2vm&number=93305551212&auth=x
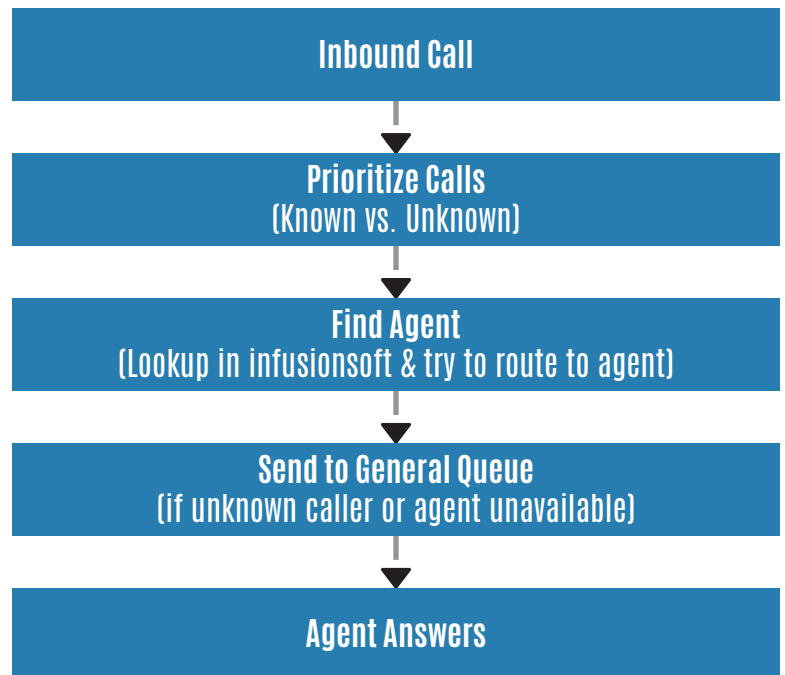
Inbound Call Routing

Integration includes a collaboration of Screen Pop, Click to Dial and Customer Call Routing. The integration is design to streamline contact center work flows, improve calling accuracy and increasing customer satisfaction by matching callers with the best fit agents.

```
                        ┌─────────────────┐
                   ┌───►│  Inbound Call   │────┐
                   │    └─────────────────┘    │
                   │                           ▼
┌──────────────────────────────┐   ┌──────────────────────────────┐
│ Pop Caller Record in         │   │     PCS App Reads CID         │
│ Infusionsoft                 │   │                               │
└──────────────────────────────┘   └──────────────────────────────┘
                   ▲                           │
                   │                           ▼
┌──────────────────────────────┐   ┌──────────────────────────────┐
│      Route to Agent          │◄──│ Lookup Assigned Agent in      │
│                              │   │ Infusionsoft                  │
└──────────────────────────────┘   └──────────────────────────────┘
```
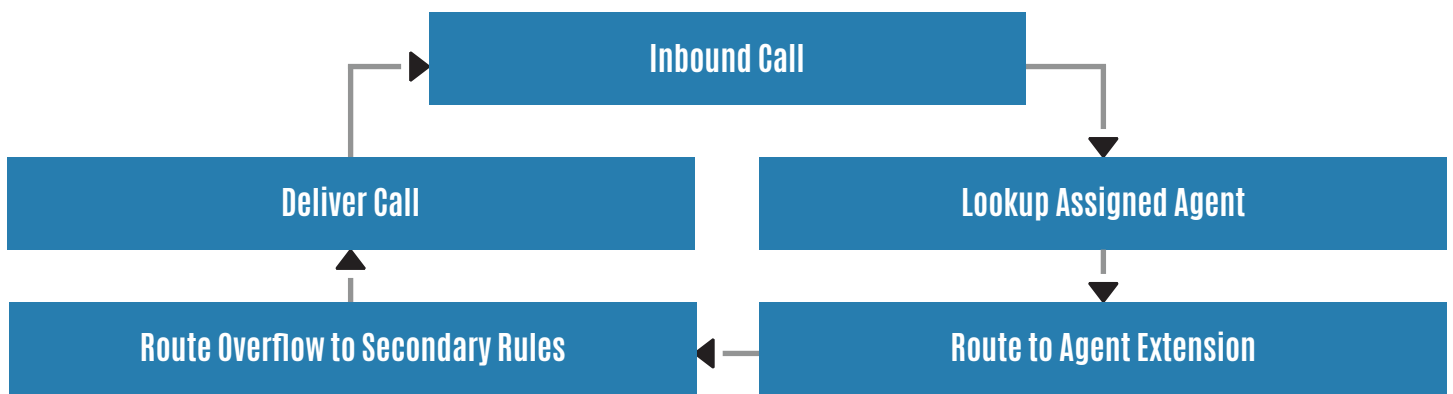
Inbound Queue Routing

Inbound queue routing can have features such as routing to a specific queue, routing to an assigned agent or maximizing call acceptance when an assigned agent is unavailable based on the number dialed.

Inbound Call

↓

Prioritize Calls
(Known vs. Unknown)

↓

Find Agent
(Lookup in infusionsoft & try to route to agent)

↓

Send to General Queue
(if unknown caller or agent unavailable)

↓

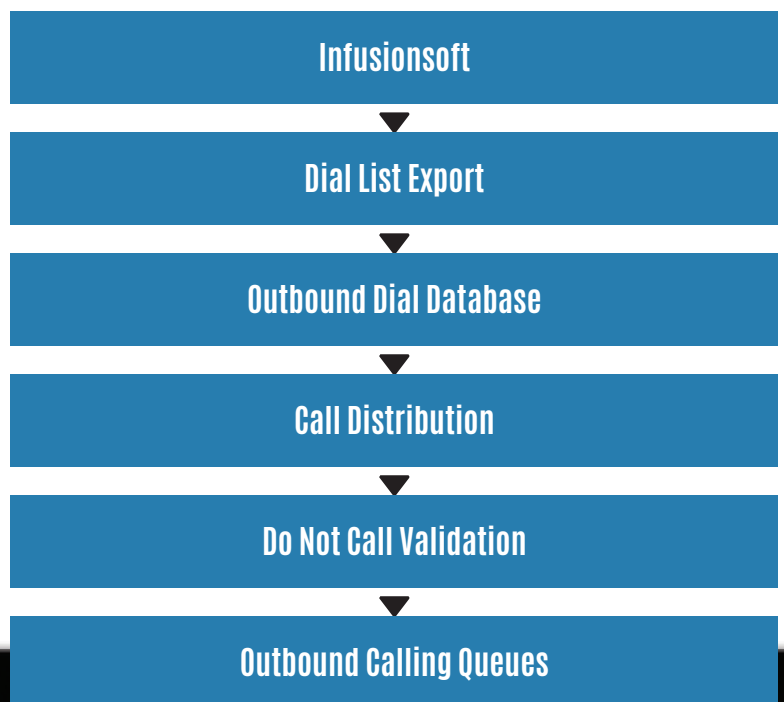| Agent Answers |
| --- |

Intelligent Call Routing

Integration to Infusionsoft webservices to provide intelligent call routing. Inbound caller ID's will be provided a web service to look up the assigned agent for the inbound call. PCS will then attempt to route the call to the assigned agent. If that agent is unavailable, the caller will be placed in the queue and routed with a secondary routing pattern.

```
                        ┌──────────────────┐
         ┌─────────────→│   Inbound Call   │──────────────┐
         │              └──────────────────┘              │
         │                                                ▼
┌──────────────────┐                          ┌──────────────────────┐
│   Deliver Call   │                          │ Lookup Assigned Agent│
└──────────────────┘                          └──────────────────────┘
         ▲                                                │
         │                                                ▼
┌──────────────────────────────┐          ┌──────────────────────────┐
│ Route Overflow to Secondary  │◀─────────│  Route to Agent Extension│
│           Rules              │          └──────────────────────────┘
└──────────────────────────────┘
```
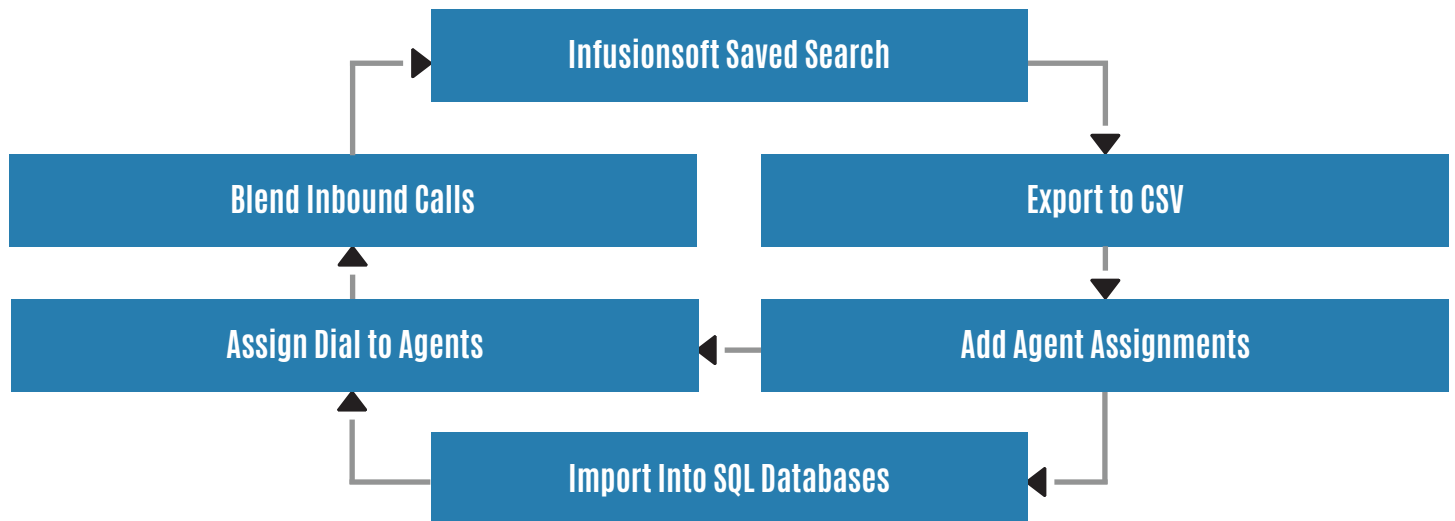
Outbound Dialer

Outbound dialing integration that uses an Infusionsoft dial list. Users will export a saved search from Infusionsoft into a CSV file and assign an outbound call reps to the file. PCS will provide an import interface to load contacts for dialer distribution. Dialer provides blended calling operation that gives priority of inbound calls over outbound dialer lists.
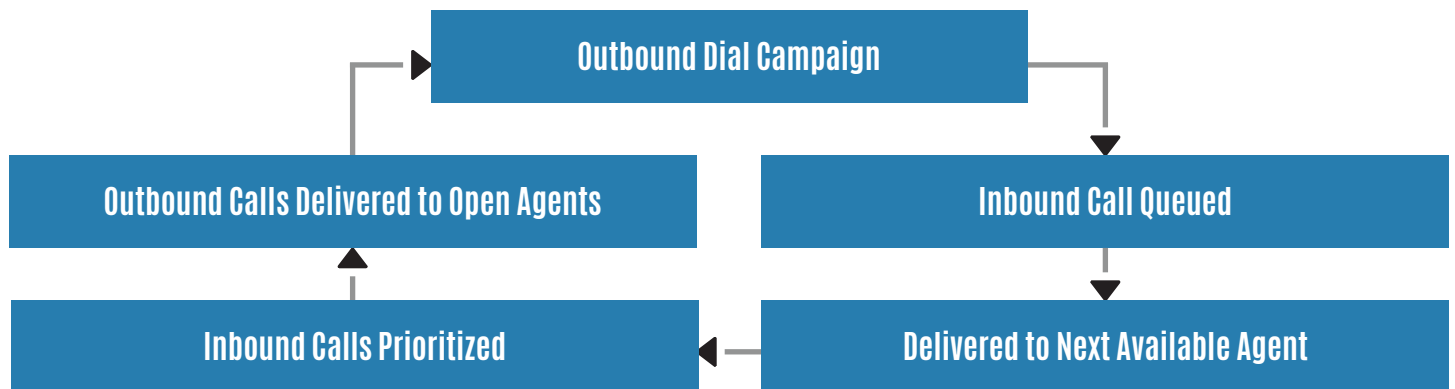
Dialer Architecture

Infusionsoft

▼

Dial List Export

▼

Outbound Dial Database

▼

Call Distribution

▼

Do Not Call Validation

▼

Outbound Calling Queues

Dialer List and Calling Workflow

```
                    Infusionsoft Saved Search
                    ↗                        ↘
    Blend Inbound Calls                      Export to CSV
          ↑                                        ↓
    Assign Dial to Agents  ←  Add Agent Assignments
          ↑                                  ↑
          Import Into SQL Databases  ←
```

Infusionsoft Saved Search

Blend Inbound Calls

Export to CSV

Assign Dial to Agents

Add Agent Assignments

Import Into SQL Databases

Call Blending

Outbound Dial Campaign

Outbound Calls Delivered to Open Agents

Inbound Call Queued

Inbound Calls Prioritized

Delivered to Next Available Agent

Screen Pop

Provides inbound calling screen pop integration to Infusionsoft. Two options are available; Server-Side and Client-Side screen pop.
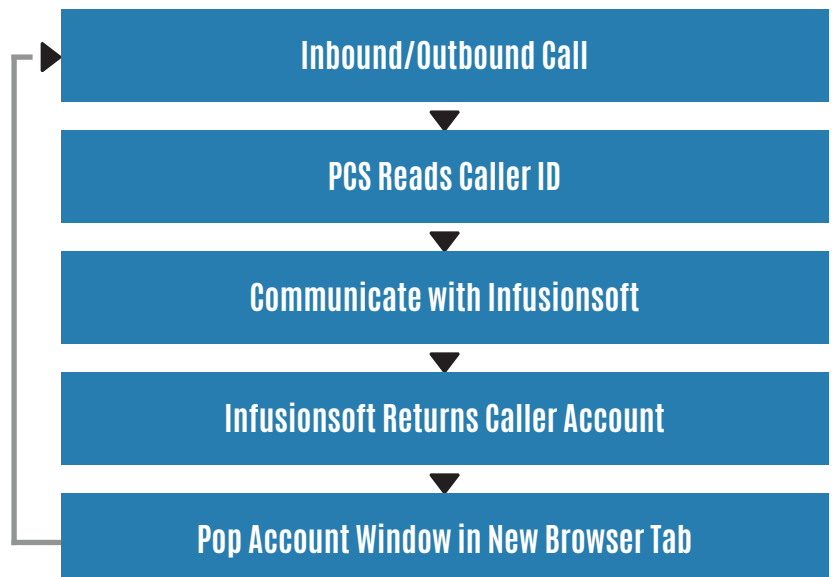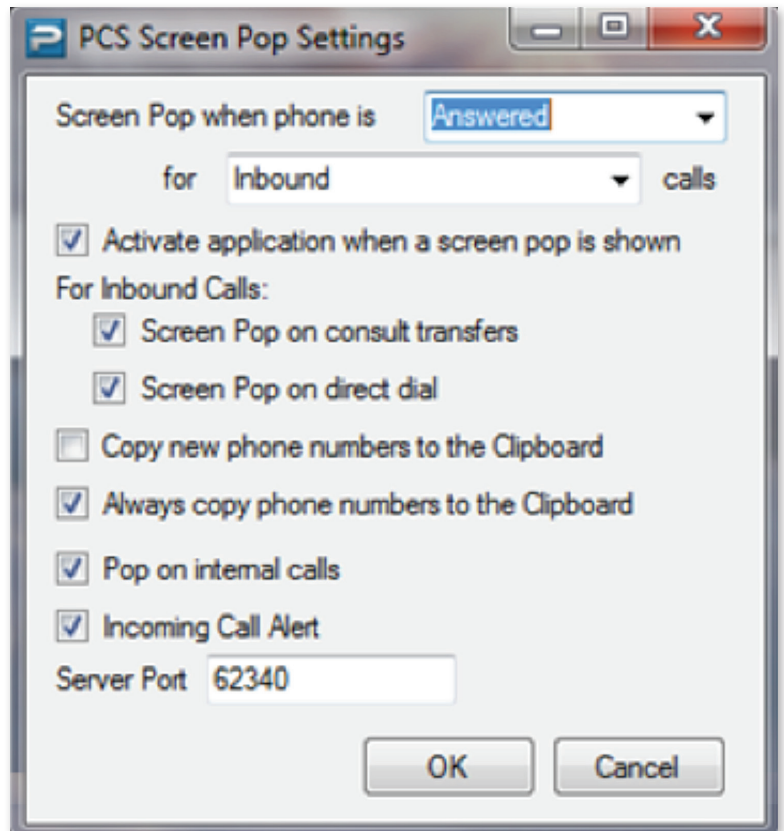
A variety of settings are provided in order to customize the user experience on when the screen pop occurs.

Client-Side

Incoming calls trigger a screen pop by opening a new web browser tab to a specified URL based Caller ID or other IVR obtained information. The PCS Screen Pop automatically searches for the caller's phone number and provides that person's account information when the phone is answered.

Server-Side

Inbound and outbound calls can be configured with screen pop action. Events are triggered when a monitored extension is receiving an inbound call or dialing outbound. Web services can be integrated into the server-side outgoing screen pop functionality.

Inbound/Outbound Call

▼

PCS Reads Caller ID

▼

Communicate with Infusionsoft

▼

Infusionsoft Returns Caller Account

▼

Pop Account Window in New Browser Tab

Notes

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