PCS
PALITTO CONSULTING SERVICES

Lead Perfection Integration

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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.
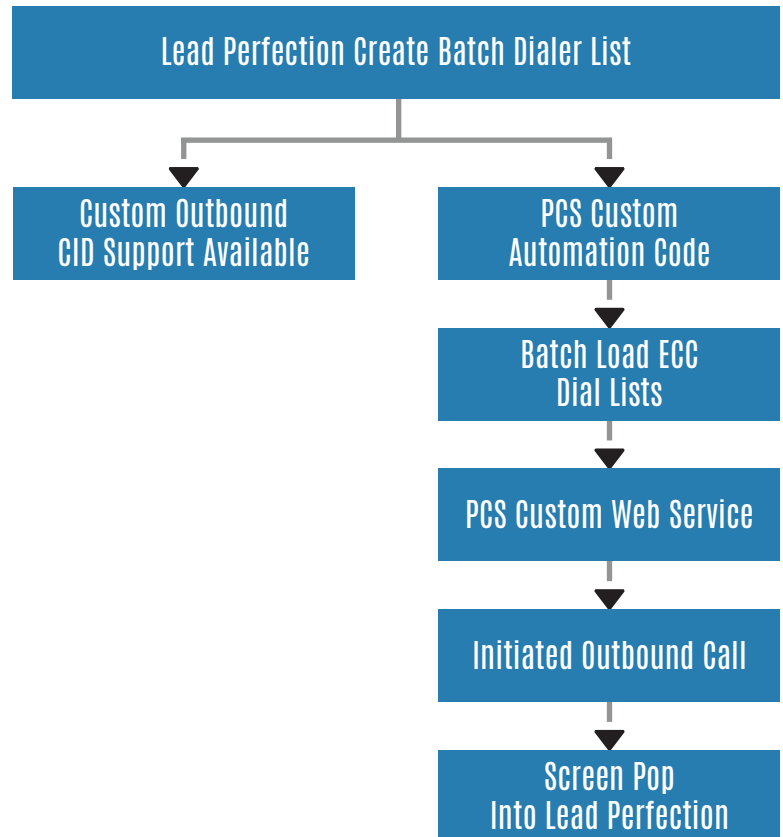
At PCS we do not have a "one size fits all" approach; we strive to provide customers with a custom solution tailored to best fit their unique business needs.

• 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!

Application Integration Architecture

Below is a high level overview of the system design, architecture and functionality of different integrations available for the Lead Perfection application.

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            ┌──────────────────────────────────────┐
            │  Lead Perfection Create Batch Dialer List  │
            └──────────────────────────────────────┘
                    │
        ┌───────────┴────────────┐
        ▼                        ▼
┌─────────────────┐      ┌─────────────────┐
│ Custom Outbound │      │   PCS Custom    │
│ CID Support     │      │ Automation Code │
│ Available       │      └─────────────────┘
└─────────────────┘              │
                                 ▼
                        ┌─────────────────┐
                        │ Batch Load ECC  │
                        │   Dial Lists    │
                        └─────────────────┘
                                 │
                                 ▼
                        ┌─────────────────┐
                        │ PCS Custom Web  │
                        │     Service     │
                        └─────────────────┘
                                 │
                                 ▼
                        ┌─────────────────┐
                        │ Initiated       │
                        │ Outbound Call   │
                        └─────────────────┘
                                 │
                                 ▼
                        ┌─────────────────┐
                        │   Screen Pop    │
                        │ Into Lead       │
                        │ Perfection      │
                        └─────────────────┘
```

Automated Outbound Dialer

Dial lists are sets of telephone numbers, in a database, used for outbound calls. The ECC dial list entities define the rules for dial lists.

Dial List: **DialList 1**

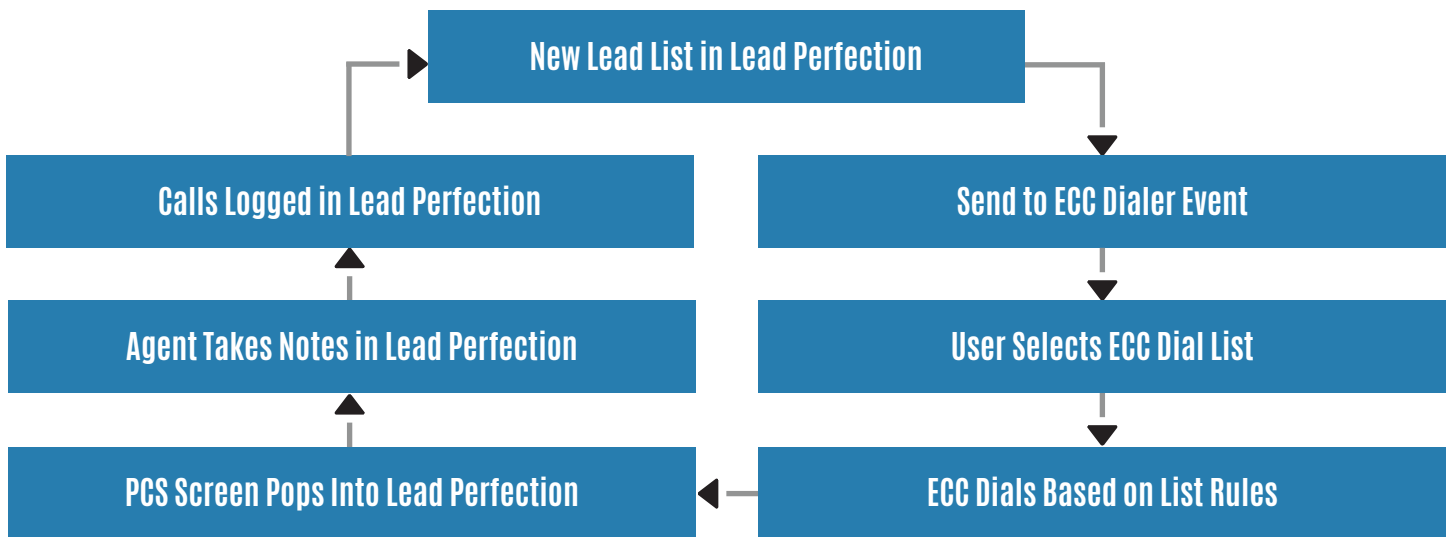| General | Input | Output | Call Profile | Skills | Advanced | Dialing Rules | Import |

Details

Name	DialList 1
Destination Type	Service
Service	Dial Out
Agent Queue	Bill
Run Script Before Transferring to Agent	☐
Script	Agentless Connected
Require Agent Confirmation	☑
Wait for Agent Confirmation	30 seconds
Maximum Number of Retries	5
Retry Calls	0 %
Retain the Dial List for	5 Days After Completion
Campaign Caller ID	

Batch Dialer

Feature that allows customers to load campaign lists from Lead Perfection by clicking on an interface button in ShoreTel ECC Director. The lists will then be set to execute a dial campaign. Clients can set up multiple lists in Lead Perfection and import them into multiple queues in ShoreTel ECC.

Caller ID Changer

Outbound calling with custom outbound caller ID based on the contact number dialed. A defined scheme for choosing different caller ID's is needed, can be based on different campaigns, specific product offerings or other database information definitions.

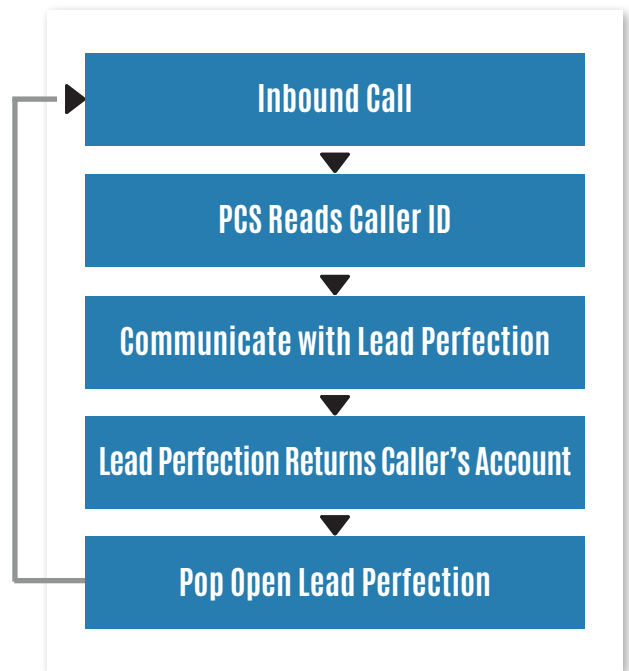| Lead Perfection Outbound Campaign |
| :---: |
| ▼ |
| Query for Associated Caller ID |
| ▼ |
| ShoreTel Server Dials Contact with Associated Caller ID |
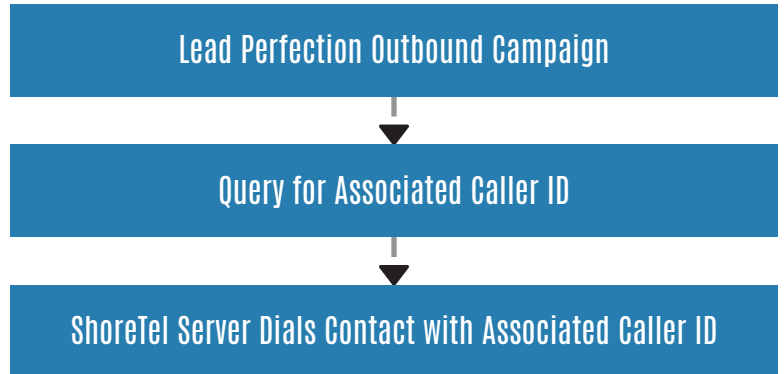
Logging & Monitoring

Log and monitor dialing events. Logs are accessible from Windows Event Viewer and on the ShoreTel Server. An additional feature is to receive uptime status updates by email and SMS.

Screen Pop

Provides inbound calling screen pop integration to Lead Perfection. Incoming calls trigger a screen pop by opening a new web browser tab to a specified URL which opens the Customer Detail Page. PCS will use back-end API's and modern browser integrations to complete the functionality. The architecture shown below provides a robust back-end communication to deliver reliable browser-level user experience.

A variety of settings are provided in order to customize the user experience on when the screen pop occurs.

Inbound Call
▼
PCS Reads Caller ID
▼
Communicate with Lead Perfection
▼
Lead Perfection Returns Caller's Account
▼
Pop Open Lead Perfection

Notes

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