

Sugar CRM Integration

Updated 3/2017

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Learn more about maximizing
your ShoreTel phone system



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.

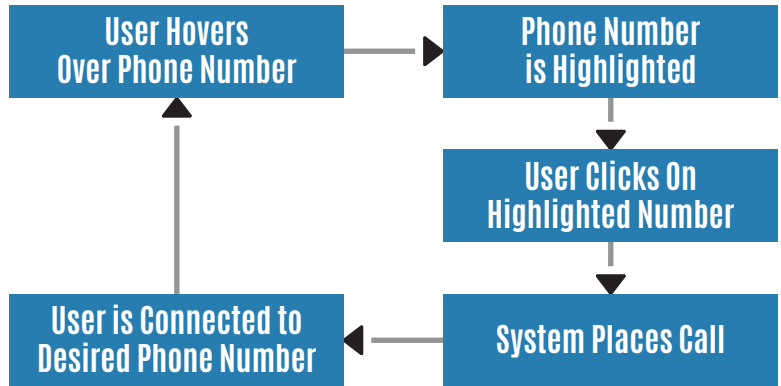
- PCS began working with the ShoreTel platform in 2002; we have over 50,000 hours of development time
- PCS team is ShoreTel Certified in both Installation and Support of Cloud, Onsite, Contact Center and Mobility Practices
- All of our team members reside in Ohio
- Our project history ranges from one location sites to large deployments with sites that span several states or countries

PCS Strives to be a World Class ShoreTel Partner!

Click to Dial

Outbound dial capability from Sugar CRM 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

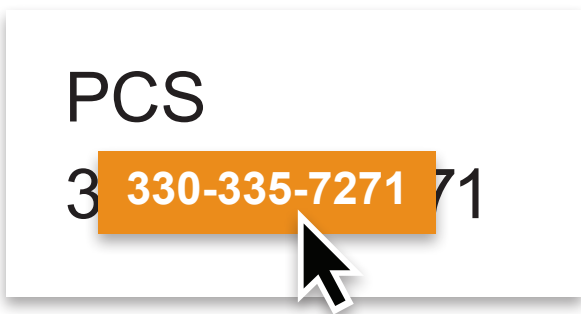


Universal Dialer

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.

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

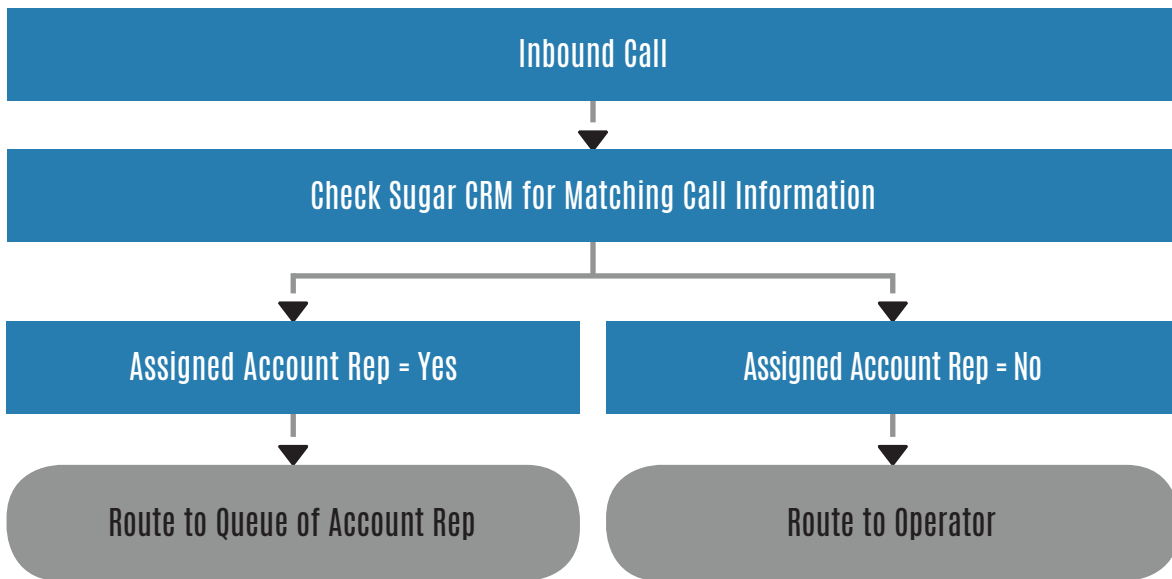
The universal dialer is a Windows application that runs on Windows clients. Other operating systems are not currently supported.



Call Routing

The Inbound Call Routing integration routes inbound calls to assigned agents. The PCS call router will use caller ID to search for known customer records in Sugar CRM and look up the assigned account representative. The call will then be routed to the designated account representative's extension before going to the operator.

If the caller ID is not found or there is not a valid representative assigned to the account, the call router will send the call to a configurable workgroup.



Phone Logging

Phone log entries will be automatically recorded within the Record screen, which pops on inbound calls. Users can add notes and manage any desired followup during the call.

▼
Accounts ▼
Contacts ▼
Leads ▼
Targets ▼
Target Lists ▼
▼

CI

Subject
 Inbound Call with [ShoreTel User Name]

Status
 Held ▼

Cancel

Save ▼

»

Start Date

End Date

Repeat Type
 Select... ▼

Direction
 Inbound ▼

Popup Reminder Time
 None ▼

Email Reminder Time
 None ▼

Description

Automated Call Log Entry - Call was Received [or Dialed] at 11:28 AM on 10/4/2016

Related to
 Lead ▼ Mrs. Judy Mera ✕ ▼

Guests

	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm
Le Mrs. Judy Mera	No Reply								
Us Sarah Smith	No Reply								

Assigned to
 Sarah Smith ✕ ▼

Teams
 Global ▼ ★ +

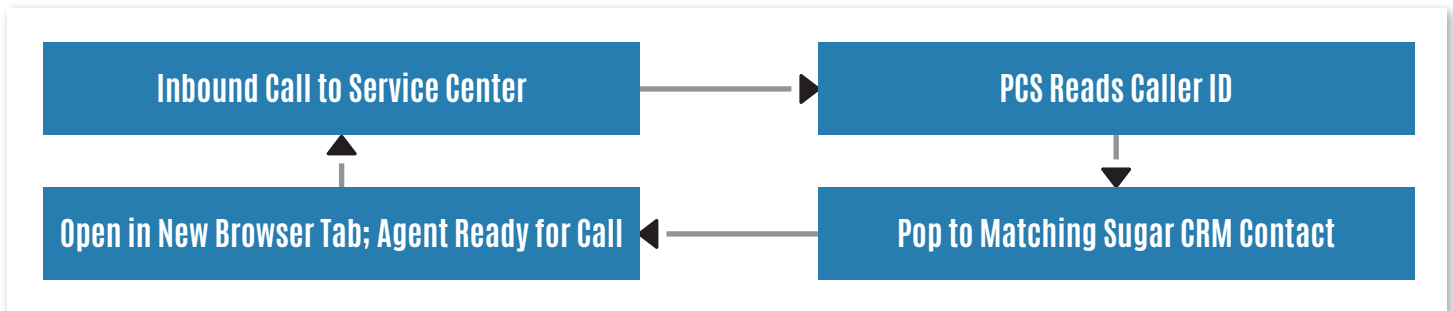
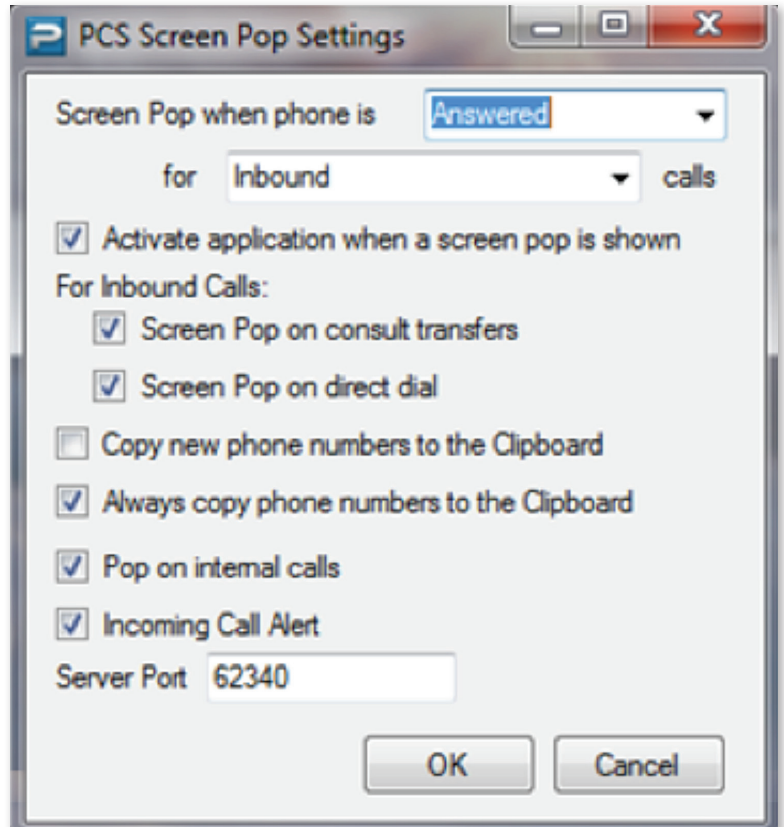
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Screen Pop

Provides inbound calling screen pop integration to Sugar CRM. Incoming calls trigger a screen pop by opening a new web browser tab to a specified URL which opens the accounts, leads or contacts page, based on associated inbound Caller ID. The PCS Screen Pop automatically searches for the caller's phone number and provides that person's account information when the phone is answered. The application can filter through information to provide best information, for example, it can prefer Account, then Lead, then Contact if the number is found in multiple areas of the CRM. If there is no matching contact for the incoming caller ID, the system pops to the Account Search page. Also configurable for outbound calls.

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





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