

Zoho CRM Integration

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Content

About PCS	2
Screen Pop	3
Click to Dial	4
Inbound Call Routing.....	5
Wallboard Application.....	6-7

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

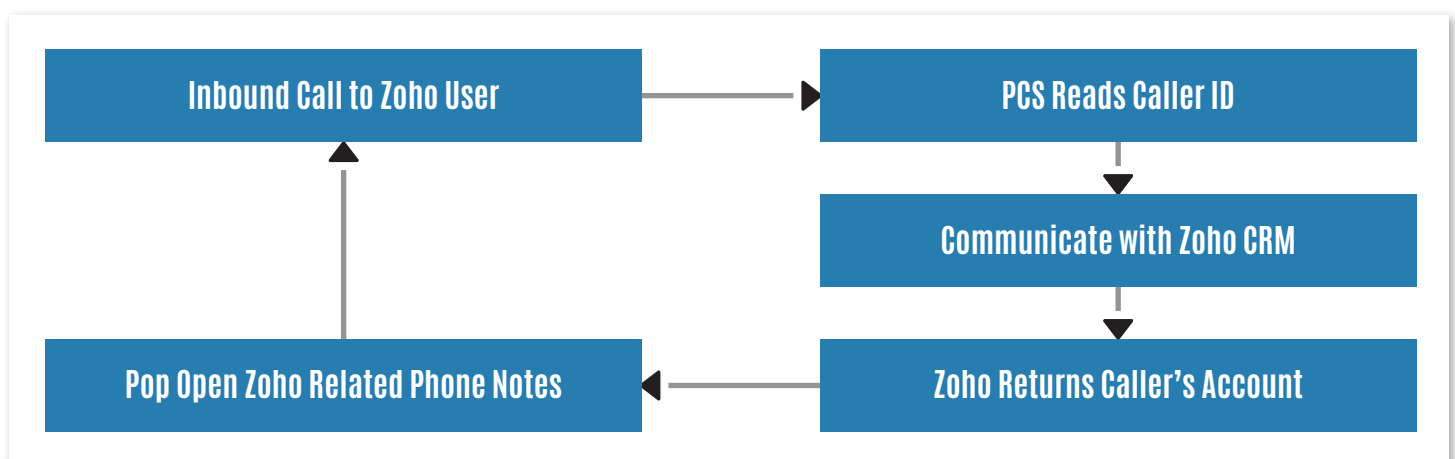
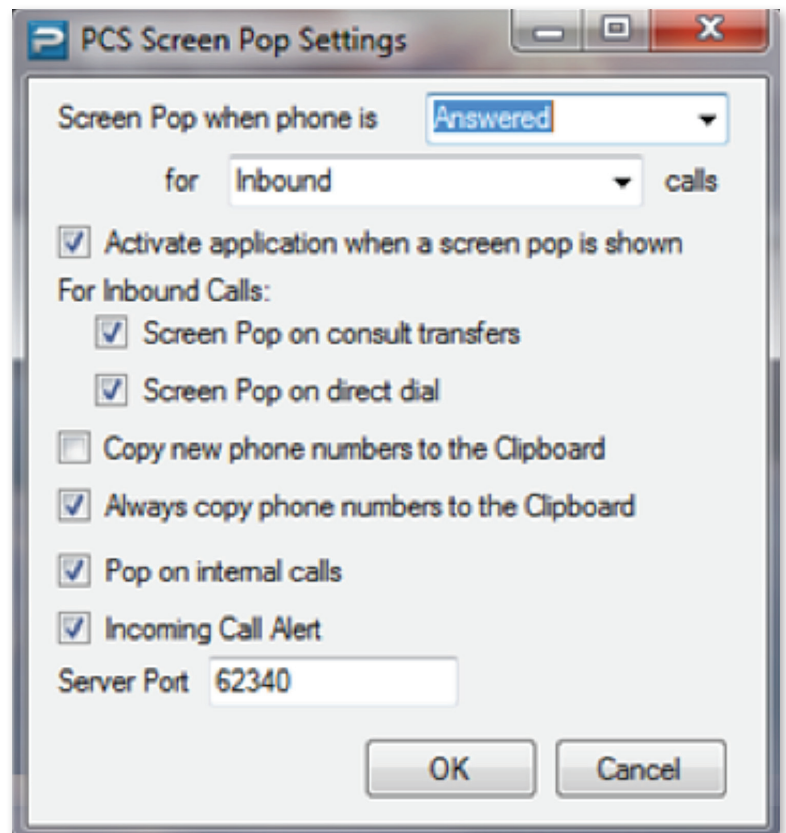
PCS Strives to be a World Class ShoreTel Partner!

Screen Pop

Provides inbound calling screen pop integration to Zoho.com cloud CRM. Incoming calls trigger a screen pop by opening a new web browser tab to a URL that opens to new call notes screen associated with the inbound caller ID. If there is no matching contact for the incoming caller ID, the system pops to the new client screen.

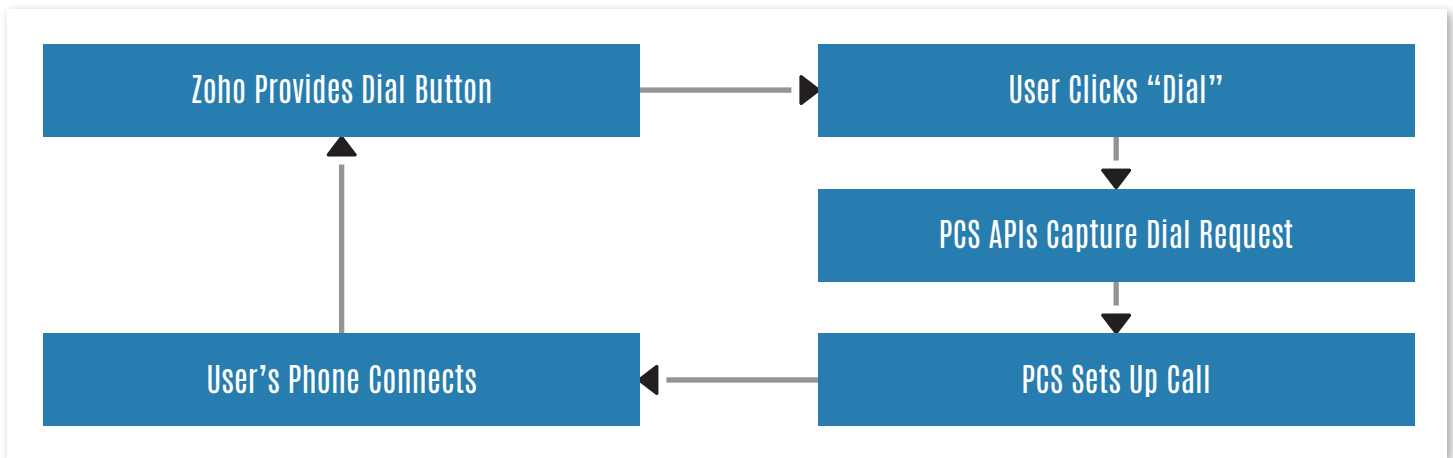
The PCS Screen Pop automatically searches for the caller's phone number and provides that person's account information when the phone is answered.

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



Click to Dial

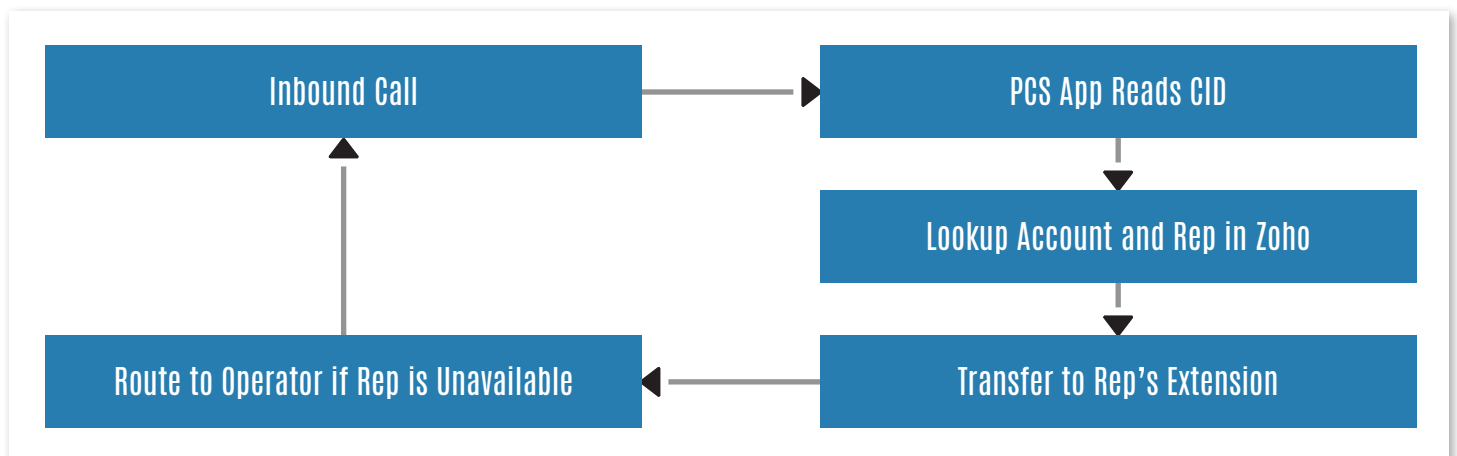
Provides the ability to outbound dial from directly within Zoho. Will also allow Click2Call functionality from within Zoho CRM for seamless outbound calling with a single click. Outbound calls are automatically logged within the Zoho CRM. A Zoho user with Phone Bridge enabled license is required.



Inbound 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 Zoho 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.



Wallboard Application

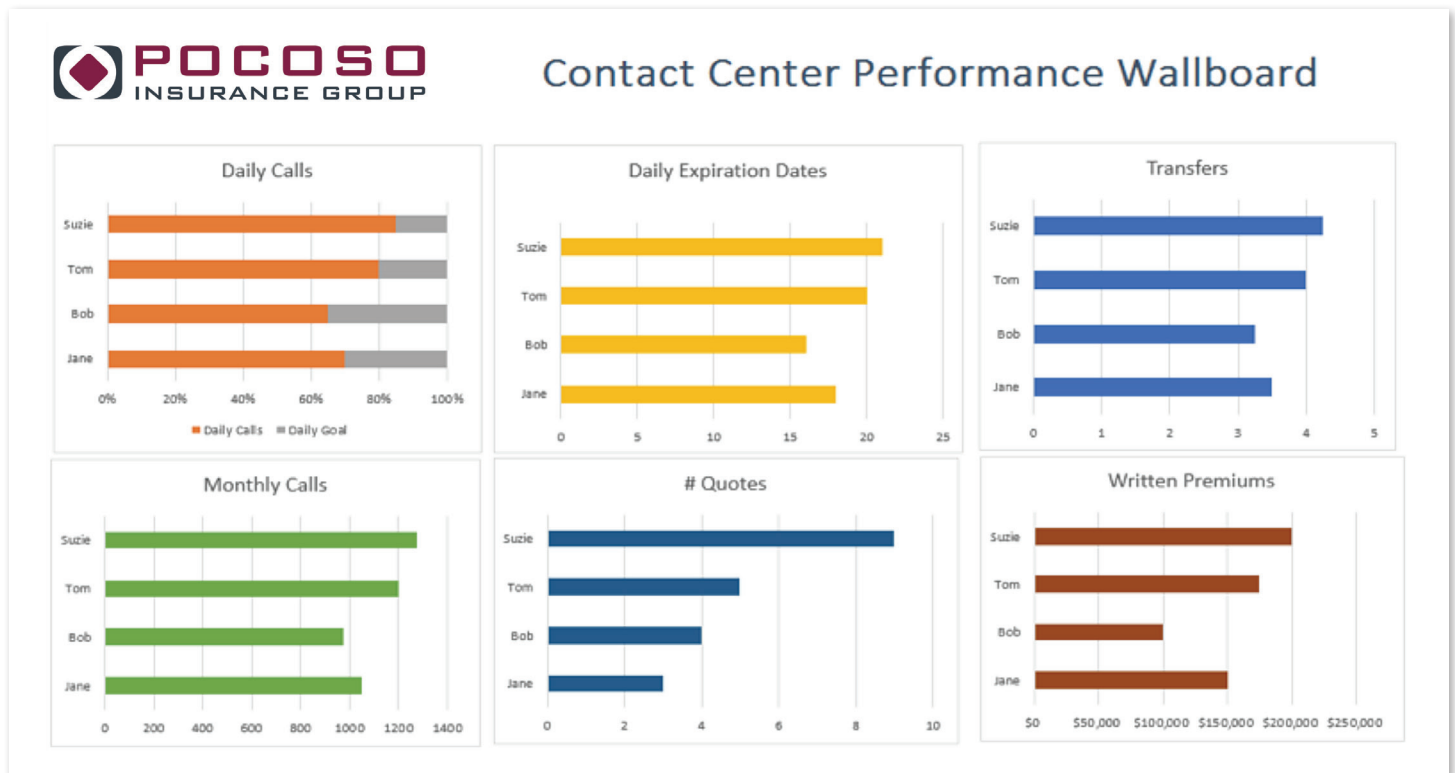
Wallboard Layout and Experience

A Wallboard Application that provides agent ranking and contact center feedback in near real time. PCS designs custom screen payouts to provide pertinent information. The layout and screenshot below is an example of what a Wallboard can look like. PCS will work with you to determine which metrics will best fit your business needs.

Settings Interface:

An administrator settings interface is provided to set up and manage wall board display and behavior. The settings interface includes the following settings:

- Contact Center Groups – Select the agent queues to be included in the calls metrics.
- Insurance Agent Groups – Select the groups to be included in the insurance agent groups.



Metrics Summary

The Wallboard metrics as shown in the example on page 6 are summarized here. This is not an exhaustive list of metrics, PCS will work with you to create metrics and metric summaries to fit your business needs.

Daily Calls

The daily calls metric provides a summary of daily call goals compared to actual calls made. The data for the goals portion of this metric will come from data entered by supervisors on a dashboard settings interface. The daily calls data is fed real-time from the ShoreTel ECC system

Daily Expiration Dates

The daily expiration dates metric will be driven by a real time connection to Zoho CRM. This data will be captured from a custom field in the Contacts object.

Transfers

The transfers metric counts all calls transferred from the groups included in this dashboard to any work group extension that is defined as an insurance agent in the dashboard settings interface.

Monthly Calls

The monthly calls metric provides a summary of monthly call goals compared to actual calls made. The data for the goals portion of this metric will come from data entered by supervisors on a dashboard settings interface. The monthly calls data is fed real-time from the ShoreTel ECC system.

Number of Quotes

This metric will feed from a near real-time connection to Zoho CRM.

Written Premiums

This metric counts total written premiums from a Zoho CRM feed.



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