



Consilium UniAgent Salesforce SCV Onboarding Guide

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1 Introduction

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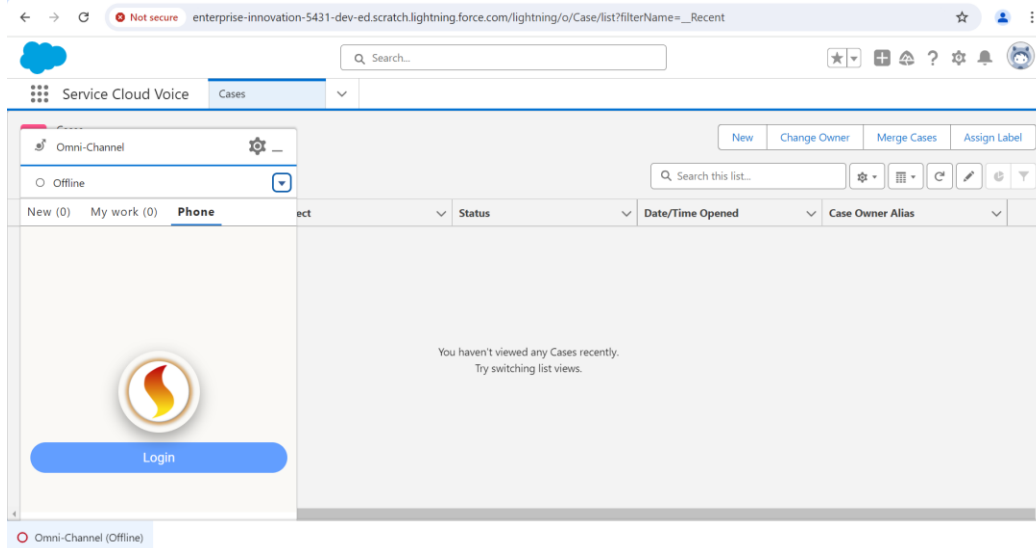
This document provides the detailed steps of Consilium UniAgent Salesforce SCV onboarding and User guide details.

1.1 About UniAgent

Consilium UniAgent™ (CTI connector) empowers your agents by transforming the CRM into their primary interface, consolidating interactions across voice and digital channels. Our intelligent single-screen interface merges contact center functionalities with diverse CRM products, facilitating efficient, context-driven responses across voice , email , web chat and more.

1.2 Key Features

- Inbound/outbound calls handling.
- CRM screen pop on call ringing event.
- Call activity logging to CRM
- Click to call from CRM
- Telephony functions (Answer, Transfer, Consult and Conf)



UniAgent Salesforce Unified view – Login

2 UniAgent Customer Onboarding

Pre-requisites:

- 1- Admin credentials for Control Hub access
- 2- At least one admin and one supervisor with extensions set up in Control Hub.
- 3- Agent accounts with Standard or Premium licenses in Control Hub.
- 4- Agent account configured on Webex CC management portal with agent sign-in capability.
- 5- Salesforce Service Cloud Voice Instance

3 UniAgent Installation

Hardware Requirements: 16gb RAM, 500gb disk space , CPU: 2 x 2.4 GHz

Deployment Options:

- On-premise
- Cloud

Please Refer our Deployment Guide for detailed information.

4 UniAgent Integration Points

Integration Points for UniAgent with Webex Contact Center

UniAgent integrates seamlessly with Webex Contact Center APIs to build a robust custom CRM connector. This integration allows UniAgent to receive and manage all events, both incoming and outgoing, enhancing the efficiency and effectiveness of customer interactions. Below are the key integration points:

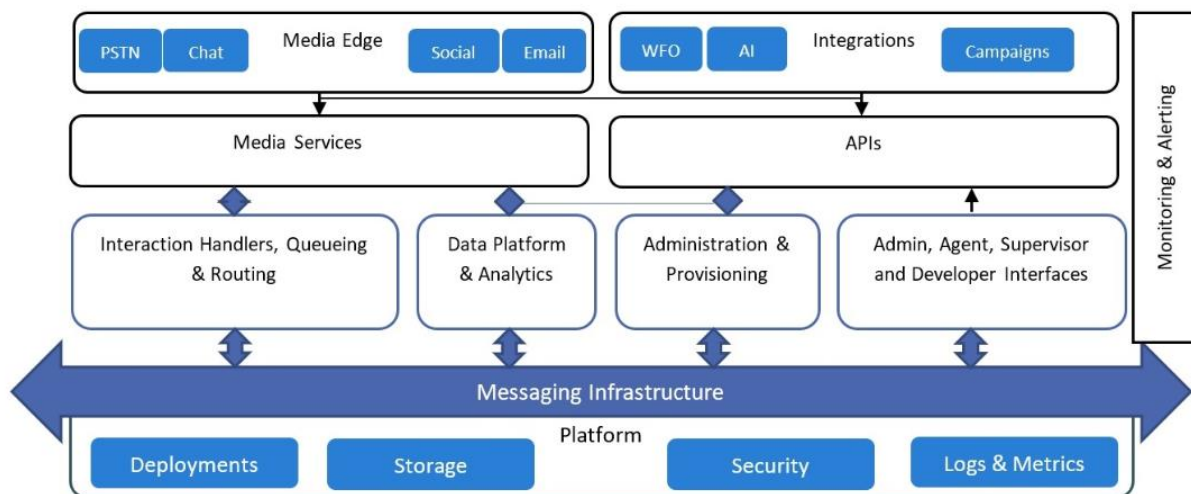
1. Authentication and Authorization:

- Utilize Webex Contact Center OAuth2.0 authentication mechanism to ensure secure access to APIs.
- Implement token management to handle the lifecycle of access tokens for ongoing API interactions.

2. Call Control APIs

3. Task Management APIs

4. Event Subscription and Notification



Webex CC Logical Architecture

Integration Points for UniAgent with Salesforce SCV

UniAgent integrates with Salesforce SCV to provide advanced CTI (Computer Telephony Integration) functions such as screen pop-ups, click-to-call, and call activity logging. This integration ensures a seamless user experience and enhances the efficiency of customer service operations. Below are the key integration points:

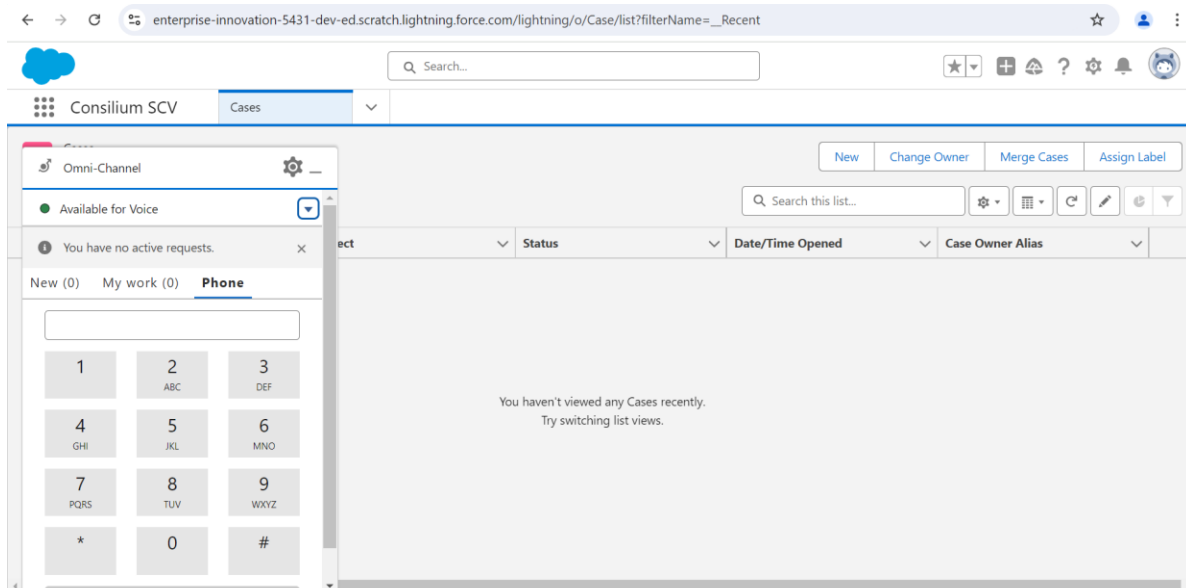
CTI Functions:

Screen Pop: Configure screen pop functionality to display customer information and interaction history in real-time as soon as an incoming call is detected. This ensures that agents have all relevant information at their fingertips.

Click-to-Call: Enable click-to-call functionality within Salesforce SCV, allowing agents to initiate outbound calls directly from the customer records or interaction history screens.

Call Activity Management:

Log Call Activity: Automatically log call details, including call duration, caller ID, and call outcome, into Salesforce SCV. This ensures that all customer interactions are accurately recorded.



UniAgent SCV – Landing Page