Consilium UniCRM for WebexCC
Onboarding Guide

Nov 2024

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1 Introduction

This document provides the detailed steps of Consilium UniCRM WebexCC Onboarding and User guide details.

1.1 About UniCRM

Consilium UniCRM™ empowers your agents by transforming the CRM into their primary interface, consolidating interactions across voice and digital channels. Our intelligent interface merges contact center functionalities with diverse CRM products, facilitating efficient, context-driven responses.

1.2 Key Features

- Inbound/Outbound calls handling.
- CRM screen pop on Call Accept event.
- Call activity logging to CRM
- Click to call from CRM

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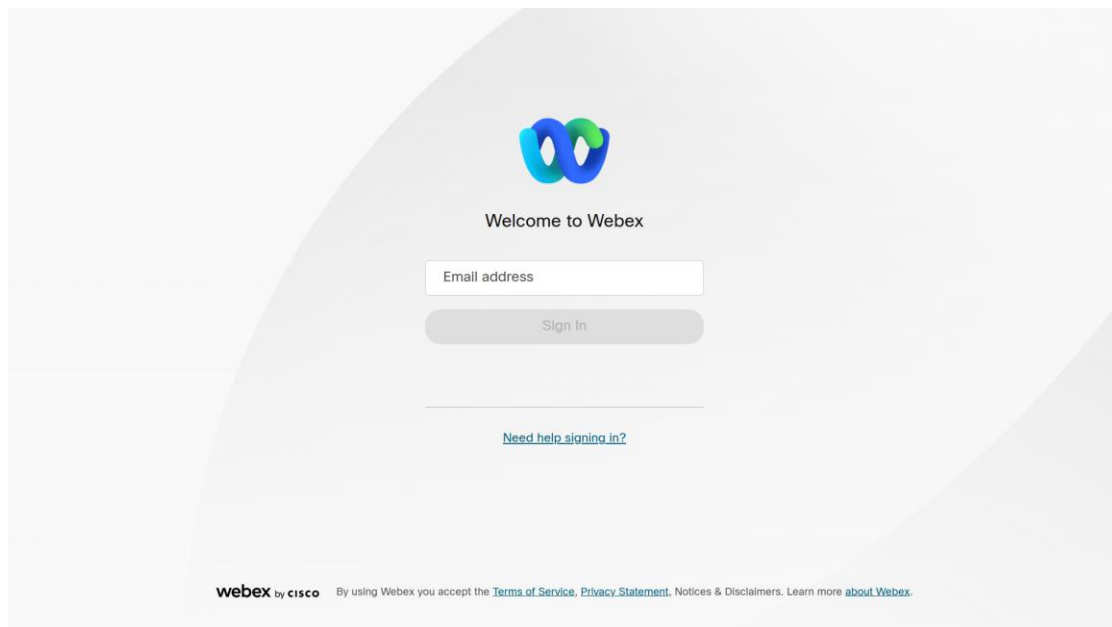
UniCRM WebexCC Unified view – Login

2 UniCRM 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.

3 UniCRM 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 UniCRM Integration Points

Integration Points for UniCRM with Webex Contact Center

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

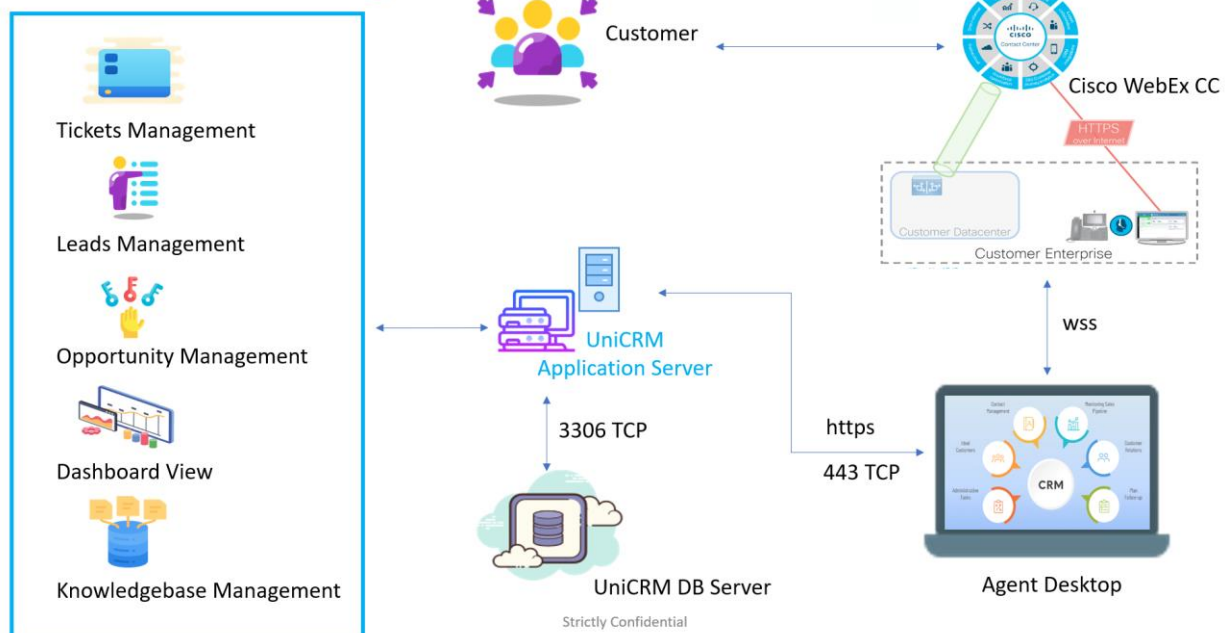1. **Authentication and Authorization:**
   - Utilize Webex Contact Center OAuth2.0 authentication mechanism to ensure secure access to APIs.
   - Implement token management to handle the lifecycle of access tokens for ongoing API interactions.

2. **Webex Agent Desktop SDK**
3. **WxCC APIs (Users, Task)**
4. **Event Subscription and Notification**

UniCRM™ Architecture Diagram

UniCRM WebexCC Logical Architecture

Integration Points for UniCRM WebexCC

UniCRM integrates with WebexCC to provide advanced CTI (Computer Telephony Integration) via Agent Desktop SDK, 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:
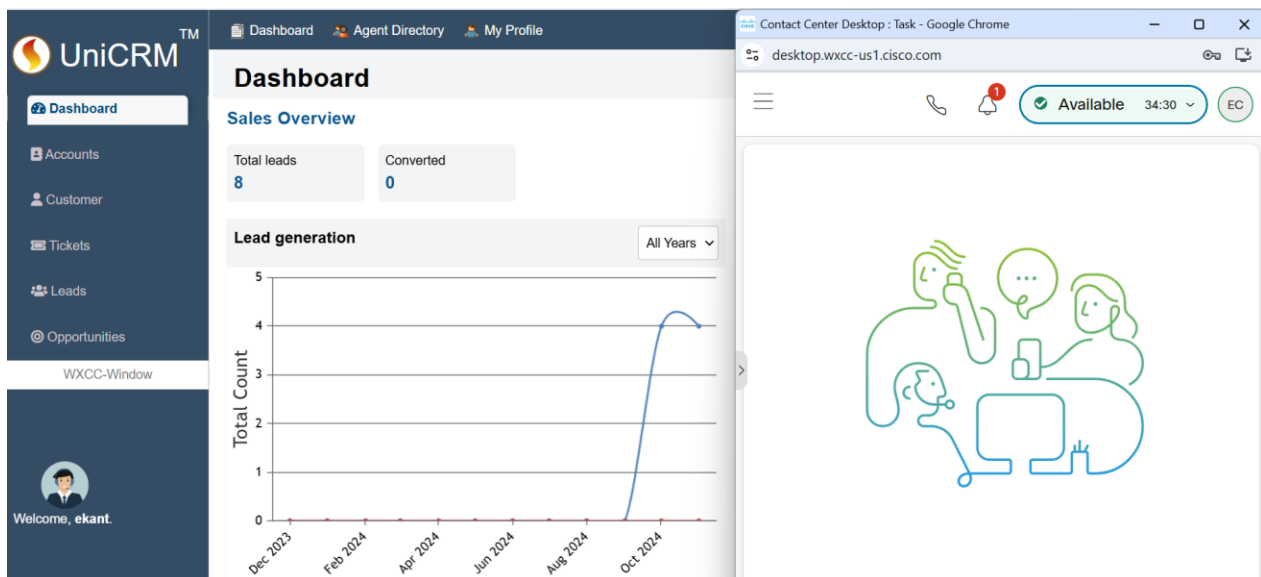
CTI Functions:

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

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

Call Activity Management:

Log Call Activity: Automatically log communication details, including customer name, advisor, date and time, interaction type, into UniCRM. This ensures that all customer interactions are accurately recorded.

UniCRM WebexCC – Landing Page