

SOLUTION BRIEF

## ShoreTel for Salesforce

IMPROVE PRODUCTIVITY AND CUSTOMER SERVICE WHEN YOU INTEGRATE YOUR CRM WITH YOUR IP PBX PHONE SYSTEM



Supercharge your Salesforce investment with an integrated, 360-degree view of all your sales, marketing and customer service communications.

Salesforce is the most popular Customer Relationship Management (CRM) application in the world because it puts the focus on customer sales and service, not administration. ShoreTel business phone systems share that same strategic vision: focus on the customer experience, and keep things brilliantly simple.

ShoreTel for Salesforce enables a single-source view of all your business communications and customer interactions. This tight integration unifies voice and customer data and enhances the functionality of both the phone and CRM applications. It's easy to associate Salesforce records with any call, add comments to the user record, then transfer the call—with its associated data—to another agent. Users can create dashboards to track contacts, which can serve as an early indicator of sales, service or operational performance.

This potent combination of quantity and quality of information gives management critical business metrics never before available.

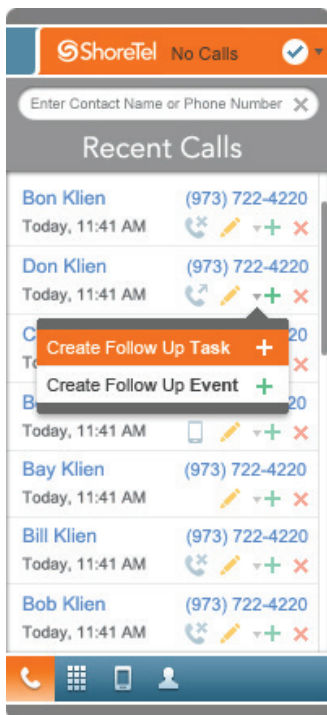
### Improve your entire enterprise

When you connect your unified communications system to your CRM, adoption of both applications increases. Everyone can enable more effective collaboration, higher productivity and better business results. Empower your people to excel:

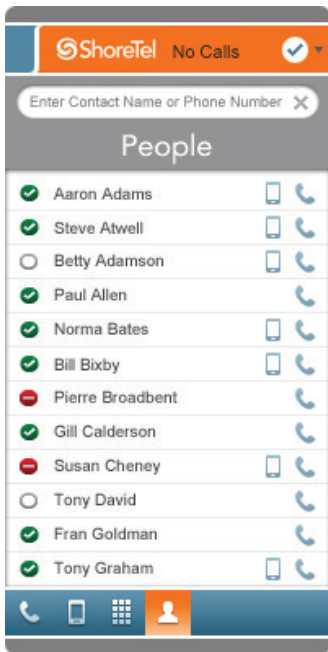
**Sales teams:** The more calls you make the more sales you make. ShoreTel for Salesforce makes it one-click easy to call a lead, opportunity or customer. The application automatically logs the call as a

sales activity and prompts the user to schedule a follow-up task or action, helping to drive the result—higher sales team productivity and faster time to close.

**Road warriors:** Work is no longer a place you go, it's a thing you do and road warriors spend more time on their mobile phones than at their desks. ShoreTel for Salesforce removes the manual chore of logging calls, regardless of whether the call is placed at a desk or via mobile. Calls are automatically captured providing a complete view of all customer interactions.



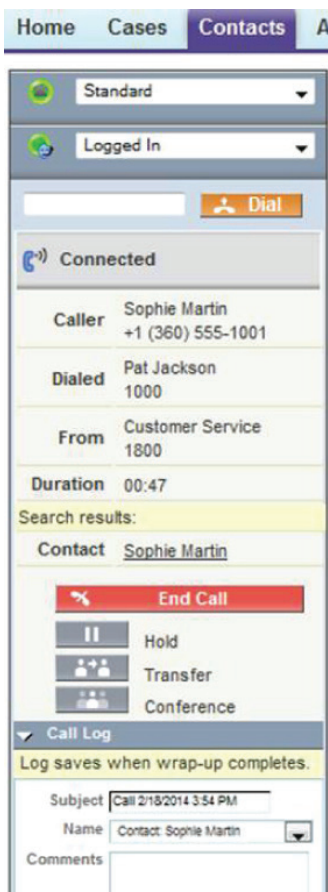
Call activity prompts users to schedule a follow-up task or event (ShoreTel Sky for Salesforce)



Top: presence allows users to know others' status (ShoreTel Sky for Salesforce)

Below: call logging is automatic in this softphone screen shot;

Below right: presence indicates available, on the phone, in a meeting, out of office and do not disturb (ShoreTel for Salesforce)



**Contact center agents:** When a customer calls, a ShoreTel screen pop tells who is calling, and Salesforce tells *why* they're calling, shortening response times. When the call is transferred to a colleague, whether inside or outside the contact center, all of the customer's Salesforce information travels with the call—so customers never have to repeat themselves again.

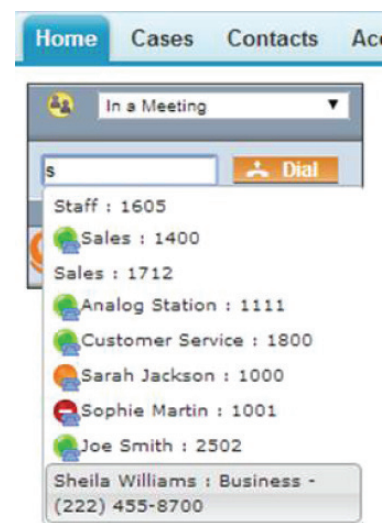
**Marketers:** Call-throughs are tracked as easily as click-throughs when customers dial unique marketing numbers placed on ads. ShoreTel for Salesforce recognizes the number, associates the call with the appropriate campaign, and allows staff to track leads through closure for true marketing campaign ROI.

**Managers:** Actionable business intelligence helps managers manage better. Sales managers can tell if reps are making an appropriate number of calls and whether they are reaching voice mail or getting through to prospects; service managers can receive precise first-caller resolution reporting, by tracking calls and activities aligned to cases.

## ShoreTel for Salesforce key features

- **Support for next-generation** browser-based CTI for Salesforce on any device or OS
- **Browser-based user interface** integrates with Salesforce environment
- **Single sign-on** for contact center agents
  - SCC Agent single sign-on and global availability state management for ShoreTel Sky
  - Workgroup Agent login and state management for ShoreTel premises customers
- **Click-to-dial:** start a call from within Salesforce anytime a phone number is available
- **Inbound screen pops:** Inbound screen pops provide instant visibility of who is calling. Relevant contact information is displayed before the call is answered.
- **Real-time analytics:** Measure representative and campaign success. Understand call quality, not just quantity.

- **Enhanced reporting** including off-line activities and ShoreTel Mobility call tracking
- **Presence monitoring:** know if a colleague is available to take a call prior to calling or transferring a customer call.
- **Workspace transfer:** transfer the entire customer records and notes along with the phone call for an optimized customer service experience.
- **Workflow integration:** launch contextual call logs, follow up task and events from the CTI
- **Customizable screen page** layouts and Salesforce Softphone displays for personal workflows
- **Automatic Note Taking:** Post a call note when you click-to-dial.
- **Multi-modal contact recording:** complete record of all call, voicemail and SMS activity allowing analytics and reporting of all communication interactions. (*ShoreTel Sky service only*)
- **Voicemail transcription:** VMs are transcribed into text and added to the matching contact record. (*ShoreTel Sky service only*)
- **Fully synchronized** with ShoreTel Communicator and ShoreTel Collaboration functionality, allowing activity entry points from both Communicator and the Salesforce Softphone call handler. (*ShoreTel on-premises system only*)



## Additional ShoreTel for Salesforce add-ins

### ShoreTel for Salesforce: Enterprise Contact Center IVR Connector *For ShoreTel on-premises customers*

This custom application enables call routing and other IVR call flows based on CRM data housed in Salesforce business intelligence. Customer-specific Contact Center scripting and Salesforce configuration are combined with this "connector" software to produce an end-to-end, custom solution. ShoreTel Enterprise Contact Center customers using Salesforce as their CRM collaborate with a ShoreTel Contact Center script developer and a ShoreTel Advanced Applications developer to author a unique solution.

### ShoreTel for Salesforce: Call Recorder *For ShoreTel on-premises customers*

This Advanced Application add-in automatically records and archives voice communications end-to-end through call transfers and allows organizations to provide training, ensure compliance, resolve disputes, and review overall processes. External calls to IVRs, voicemail, hunt groups and workgroups can be recorded.

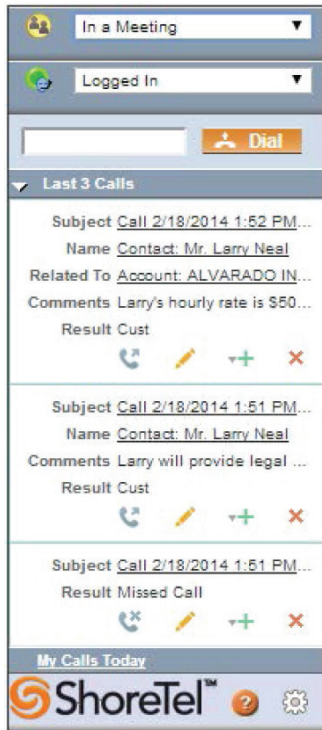
Salesforce users can playback call recordings simply by clicking embedded links within a contact activity record. With pause/resume and save/no save desktop controls, web-based playback, smart archiving and quick retrieval, it is a smart choice for contact centers, industries with stringent regulations, organizations with customer service priorities and organizations with fraud-prevention rules.

### ShoreTel for Salesforce: Call Reporting *For ShoreTel on-premises customers*

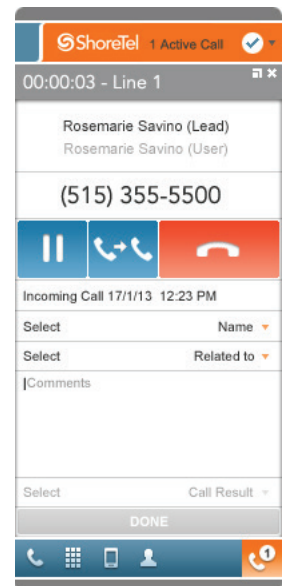
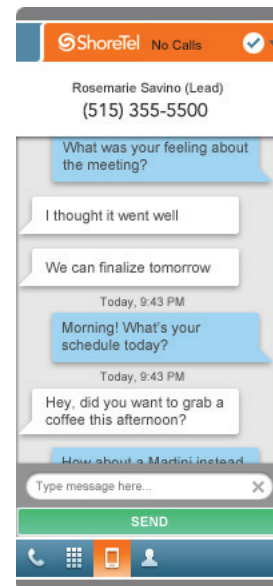
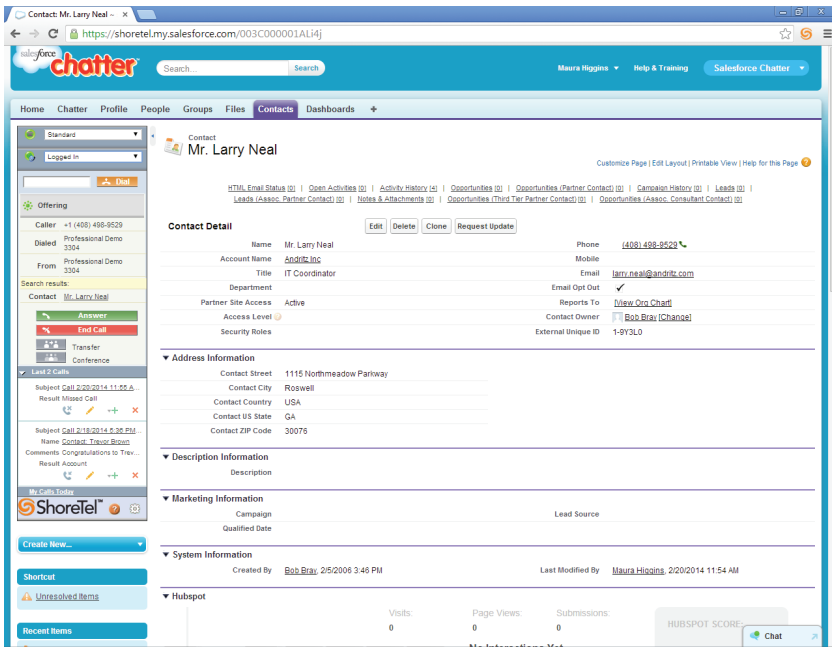
Integrate ShoreTel Call Detail Recording (CDR) into the Salesforce database so that it presents in near real-time within Salesforce reports and dashboards. This automatically links calls to Salesforce users, accounts, contacts, leads and opportunities; comes complete with six pre-built embedded ShoreTel reports and empowers customers with the ability to create many more.

## Helpful resources

- [How the Phone System Is \(Or Should Be\) Like Salesforce](#)
- [Key Metrics for Inside Sales Teams](#)
- [Do You Believe that Selling is a Team Sport? Three Keys to the Game.](#)



Above: customer data from Salesforce appears on screen with every call Below: screen shot of a call to a Workgroup agent (ShoreTel for Salesforce)



Above: SMS messages are captured for multi-modal visibility; active call is available for comments (ShoreTel Sky for Salesforce)

## ShoreTel for Salesforce integration specifications

	ShoreTel for Salesforce v.5.0	ShoreTel for Salesforce v.4.0 Call Center Adapter	ShoreTel for Salesforce v.4.0 Integration for MAC	ShoreTel Sky for Salesforce v.5.0	ShoreTel Sky for Salesforce v.4.0 Sky Connect
Deployment Type	On-Premises Phone Systems	On-Premises Phone Systems	On-Premises Phone Systems	Hosted/Cloud Phone Systems	Hosted/Cloud Phone Systems
Platform supported	ShoreTel UC Platform 13x, 14x	ShoreTel UC Platform 12x and earlier	ShoreTel UC Platform 12x and earlier	ShoreTel Sky	ShoreTel Sky
OS supported	PC, Mac, iOS, Android	PC	Mac	PC, Mac, iOS, Android	PC, Mac, iOS, Android
User interface	browser-based	workstation client	simple screen pop	unique, browser-based	workstation client
Configurable softphone layout	•	•			
Keypad		•		•	
Presence	•	•		•	•
Multi Call Support	No limit	No limit		2	2
Single sign-on for call center agents	Workgroups	Workgroups		SCC	SCC
<b>Call Control</b>					
Click to dial	•	•	•	•	•
Screen pop	•	•	inbound only	•	•
Screen Pops Cases based on Caller-entered digits	•	•			
Capture call records as tasks	•	•	•**	•	•
Open CTI, web-based support	•			•	•
Transfer	•	•		•	•
Conferencing	•	•			
<b>Applications</b>					
Automatic note capture in activity	•	•		•	•
SMS messaging				•	
SMS captured in activity				•	
Scribed voice mail as tasks				•	
Call recordings appended to tasks	•*	•*	•*		
<b>Other</b>					
Call Detail Record integration	•			•	
Off Line call reporting	•**	•**	•**	20/20 Reporting	20/20 Reporting
Mobility calls added as tasks	•**	•**	•**	•	•
Workspace transfer	•	•		•	•
Work flow (add follow up task or action)	•	•		•	•
Mobility endpoint support	•	•	•		
VPN Required	•***	•	•		

\*Requires Integration with ShoreTel for Salesforce Call Recorder

\*\*Requires integration with ShoreTel for Salesforce Call Reporting

\*\*\*No VPN required with installation of Reverse Proxy Server in customer DMZ.

### About ShoreTel

ShoreTel is a provider of business communication solutions whose brilliantly simple unified communications platforms, applications and mobile UC solutions promise a new rhythm of workforce engagement and collaboration. With costly complexity eliminated by design from its award winning, all-in-one IP phone system, UC and contact center solution, and its industry leading hosted business phone system, workers enjoy a freedom and self-reliance that other providers can't match. Users have full control to engage and collaborate, no matter the time, place or device, for the lowest cost and demand on IT resources in the industry. ShoreTel is headquartered in Sunnyvale, California, and has regional offices and partners worldwide. For more information, visit [shoretel.com](http://shoretel.com) or [shoretelsky.com](http://shoretelsky.com)



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