

inContact Work Item Routing: SalesForce Case Routing

Gain efficiencies by incorporating SalesForce Case routing into your contact center operations.

Lots of contact centers use SalesForce. Each day hundreds, even thousands of cases are referenced, created, and modified. Even though this case work is integral to an agent's day, the case work occurs in parallel with the contacts that are handled. Not anymore - inContact has developed a deep integration to SalesForce that resides natively in our platform. We've done the heavy lifting so you don't have to. Now your SalesForce case work can be seamlessly routed, monitored, and reported on just like any other contact channel in your contact center. Satisfying customers is that much easier – and measurable.

In the past, these types of integrations required a lot of development effort by the contact center. Routing case work isn't an easy process – new cases have to be detected, routed, and finally displayed to the agent. Each of those steps requires a requires a certain amount of development. I/T had to get involved- requirements were gathered, development budget determined, and then there was the internal project prioritization process. Most of the time, these integration projects are never completed. In the end, contact centers were left to make the best of it and manage these parallel workflows the best they could.

We have built in the SalesForce Case routing ability right into our platform. With a simple configuration to connect your SalesForce account to us, we can detect new cases and route them to the appropriate agent based on the conditions you specify, just like you were routing calls, or emails, or chat sessions to them. And it doesn't end there. Once an agent takes the case, our system automatically pops that specific SalesForce Case to the top of their desktop. No lookup, no clicking, no input of case number. Direct routing and Case pops save time – and in a contact center, time is money.

Don't settle for parallel workflows that necessitate separate reporting, queuing, and management. Tap into the power of a platform that routes ALL the work you do. With inContact we bring you the contact center of the future – today.

Brief Overview

inContact has built in a sophisticated integration to SalesForce that can detect, route, and pop SalesForce Cases to agents. Historically these types of integrations required many hours of I/T development by contact centers.

We've incorporated that capability natively in our platform so it's easy – and affordable - to incorporate SalesForce Cases into the same contact center workflow as voice, email, chat, etc.

Now the powerful inContact contact routing and reporting capabilities are available for SalesForce Cases, helping you improve the customer experience as well as gain productivity and efficiency.



inContact Work Item Routing:

Inbound Contact :: Agent - Windows Int
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Inbound Contact • :02 • ACW • Available 2
🕞 Work Item 🔺 🔺
▲ There is a Work Item waiting. Do you accept it? ✓ Accept X Reject
SFDC Case :02
00001209 Login Issues Subject: Customer cannot login Created: 08/21/2012 Created By: Jared Nyman
(← inContact。

Key Features

- SalesForce Cases are now another channel in your contact center
- Customized routing and prioritization are easy to set up and change business users can modify
- Report on your agents' SalesForce Case work just like the rest of their contacts – the inContact reporting suite captures their Case with the rest of their work
- Increase efficiencies and improve customer experience in your contact center through seamless, automated routing and prioritization