



The Power of We™



Avaya Agile Communication Environment™ Customer Relationship Management (CRM) Integration

Access Avaya real-time communications from Salesforce.com and Microsoft Dynamics CRM applications

With the Avaya ACE™ CRM Integration packaged application for Salesforce.com and Microsoft Dynamics, Avaya integrates real-time communications capabilities with CRM software to improve productivity and enhance customer service. Users can click to call directly from contact lists and CRM customer records. For incoming or outgoing calls, a desktop toast pop-up notification displays contextual information about the customer and gives the user the option to:

- hold or release the call
- transfer the call to an available colleague via a presence-enabled contact list
- enter notes during the call
- generate an activity record in the CRM database that includes automatically populated call detail
- view call history and missed calls in the PC system tray.

Key Customer Benefits

- **Improves productivity** through time saved not having to search for customer contact details, create customer activity records, or manually dial numbers. Users click to dial customers, colleagues and partners directly from customer records (including client case and customer opportunity records), and sales leads. A log of inbound and outbound calls can be generated automatically. Missed calls, call duration, and annotated notes are also included within the client record for easy retrieval at any time.
- **Enhances customer service** by presenting the customer number or name and company within the toast pop-up. Users can greet the customer by name, click to open the customer record, and access relevant customer information, facilitating more personalized, well-informed conversations. And, because users can see their colleagues' presence

information, calls can be transferred to available personnel from the desktop, creating a seamless handover for customer interactions.

- **Reduces costs** by using existing desk phones, eliminating the need to purchase new headsets or other PC devices.

Key Features

- **Packaged integration** to Salesforce.com and Microsoft Dynamics CRM applications provides ready-to-use, out-of-the-box functionality.
- **Click to Dial** from contact lists and customer records that contain phone numbers.
- **Automatic Call Logging** of inbound and outbound calls stores call history within the client record, including call duration and missed calls.
- **Call Annotation** allows a user to enter personal notes during a call and stores the notes in the record along with call detail such as time and date.
- **Call Duration** automatically captures conversation time for inbound and outbound calls, rounds it to the nearest minute, and stores it in the customer record.
- **Desktop Notification Service** presents a PC tray toast pop-up that:
 - » Presents incoming and outgoing calls the user makes or receives from associated devices.
 - » Displays caller name and company information retrieved from the CRM database.

- » Offers click to open for CRM records related to Caller ID, such as a contact record, opportunities/orders list, or a notes/activity record containing information from previous calls with the customer.
- » Enables remote phone answer or redirect to alternative number directly from the PC.
- » Provides call handling options including: answer incoming call, release call before or after answering, initiate call, place call on hold, retrieve held call, transfer call to another contact or telephone number, view call history and list of missed calls.

- **Presence-enabled Contacts List** lets users create a list of frequently used contacts for quick dialing or call transfer. Telephony presence can be added where available.
- **Missed calls icon** in PC system tray indicates missed calls.
 - » Click icon to display missed calls within the activity view of CRM or short list.
 - » Return calls using click to call.

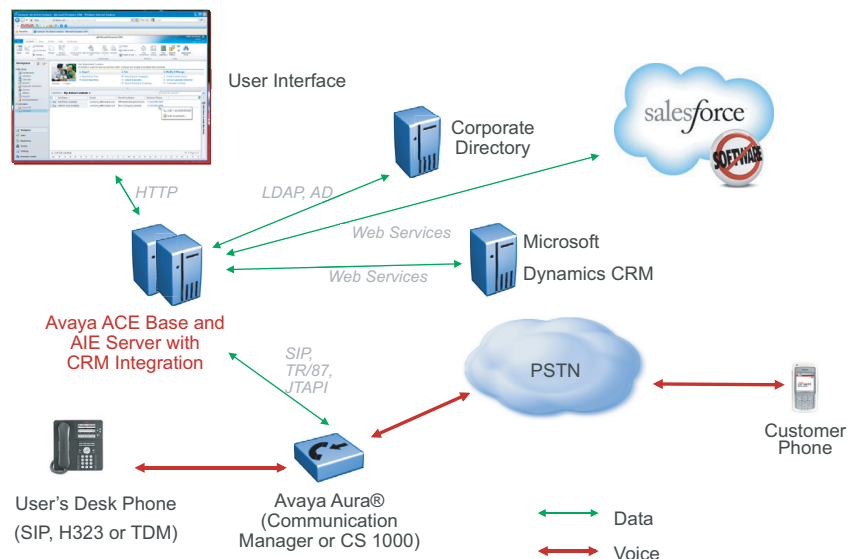
- **Choice of device** for inbound and outbound call handling within the CRM application.
- **Opt to deploy** the CRM Integration package with or without Microsoft Lync or OCS 2007 R2 installed on the desktop. To provide a complete desktop communications experience, CRM Integration can be co-deployed with the Avaya ACE™ Office Add-in application.

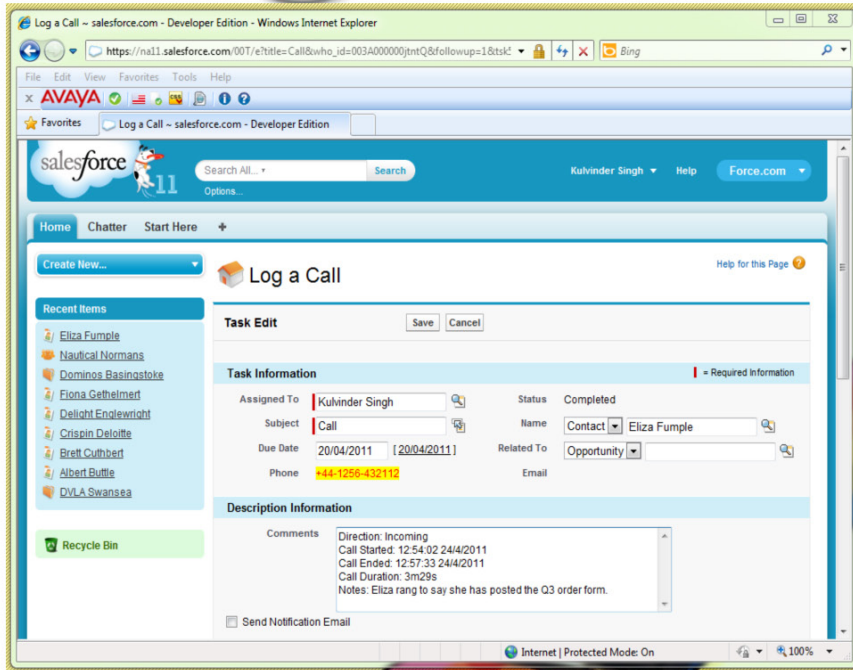
Requirements

Communication Server (Service Providers)

The following Communication Servers are supported:

- Avaya Aura® Communication Manager
 - » Avaya Aura CM 5.2.1 and 6.x (minimum of 6.1 for SIP Endpoints)
 - » AES 5.2.1 SP 2 or higher (minimum of 6.1 SP2 for SIP Endpoints)
- Avaya Communications Server 1000
 - » Release 6.0 to 7.5





Avaya ACE™ 3.0 CRM Integration

Customer Relationship Management (CRM) Server

- Salesforce.com (SFDC)
- Microsoft Dynamics Version 4

Avaya Agile Communication Environment

- Avaya ACE Core Service 3.0 or later
- Avaya ACE Application Integration Engine (AIE 3.0) or later running on

Win Server 2008 R2

Personal Computer

- Windows XP SP3 (32bit)
- Windows 7 SP1 (32bit or 64bit)

Capacity

Avaya ACE™ CRM Integration supports up to 5,000 users per Avaya ACE system.

Platform for Further Communications-Enabled Business Applications

Avaya ACE™ is Avaya's software platform for communications-enabled applications (CEA) and business processes (CEBP). Its key differentiator is rapid and simple integration of Avaya Aura® and multi-vendor communication systems with business applications and workflows. Avaya ACE is available as a set of packaged applications that can be implemented off-the-shelf with high return on investment, or as toolkits for IT developers who may not have telecom expertise. Avaya ACE toolkits consist of both high-level Web services for simple application integration and low-level foundation services for fine-tuned control of call flows across an Avaya Aura Session Manager network.

Learn More

For more information on how Avaya Agile Communication Environment™ can help your organization gain competitive advantage by integrating business applications and processes with your existing communications systems, contact your Avaya Account Manager or Authorized Partner and visit us at www.avaya.com/ace.

About Avaya

Avaya is a global provider of business collaboration and communications solutions, providing unified communications, contact centers, data solutions and related services to companies of all sizes around the world. For more information please visit www.avaya.com.

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