

PRODUCT OVERVIEW



Transera Call Center App for Salesforce™ Sales and Service Clouds

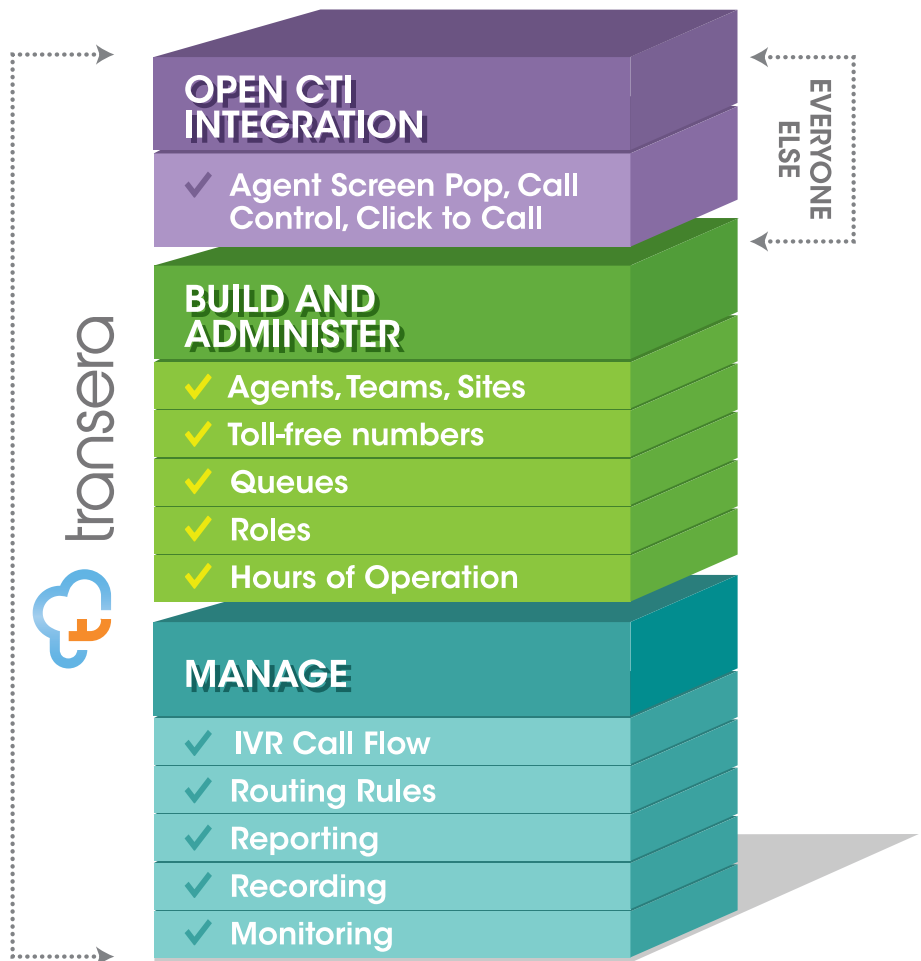
Build, Manage and Administer your Call Center within Salesforce

The Transera Call Center App for the Salesforce™ Sales and Service Clouds is a complete call center application for the multi-media contact center.

Transera's Call Center App for Salesforce does not stop with the CTI integration of voice, an agent applet and screen pop.

Transera delivers call center management, administration, routing and reporting capabilities from within the Salesforce application itself and its data is integrated into the Salesforce database for unified visibility and control. It also adds an Interactive Voice Response (IVR) system and call routing strategies – both of which can be driven by the data in Salesforce for better customer experiences.

The Transera Call Center App for Salesforce is easy to implement and cost-effective for the contact center with a handful of agents and will scale as your call center grows. Call centers with thousands of agents rely on Transera.

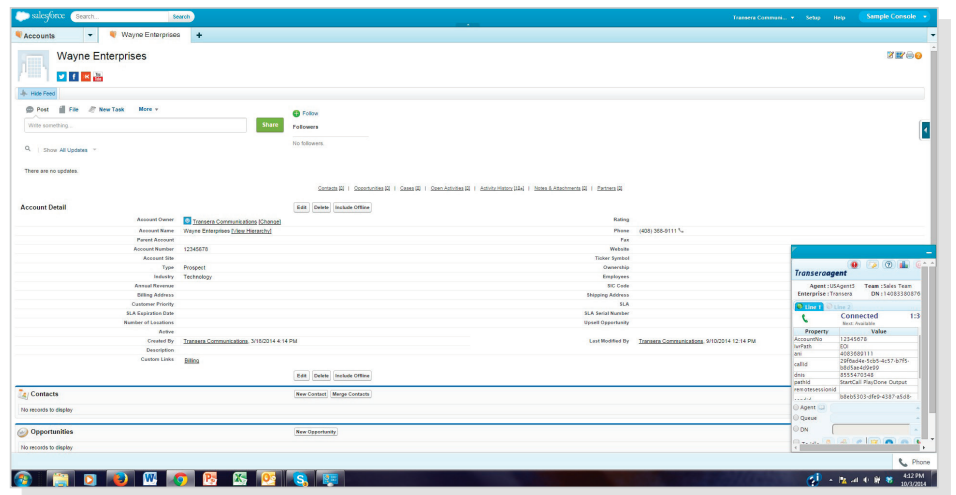


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Transera Call Center App for Salesforce™ Sales and Service Clouds

Add Voice to Salesforce with Transera's Open CTI Integration

The Transera Call Center App for Salesforce makes call center agents more productive and effective by letting them make and receive calls within the Salesforce application, while automatically logging pertinent data about their calls in the Salesforce database.



Transera Agent Applet and Screen Pop in Salesforce

Agent Screen Pop

Transera arms agents with real-time caller information — including identities, history, intent — so they know when your best customers are calling and have what they need to be effective. Transera screen pops include the caller's data in Salesforce, with the addition of their phone data and IVR prompt selections.

Call Control

The Transera Call Center App for Salesforce empowers agents to receive and transfer calls, conference in third parties for assistance and put callers on hold as they research solutions.

Click-to-Call

With Transera Call Center App for Salesforce, agents can initiate phone calls with the simple click of the telephone number in the Salesforce record.

Call Logging

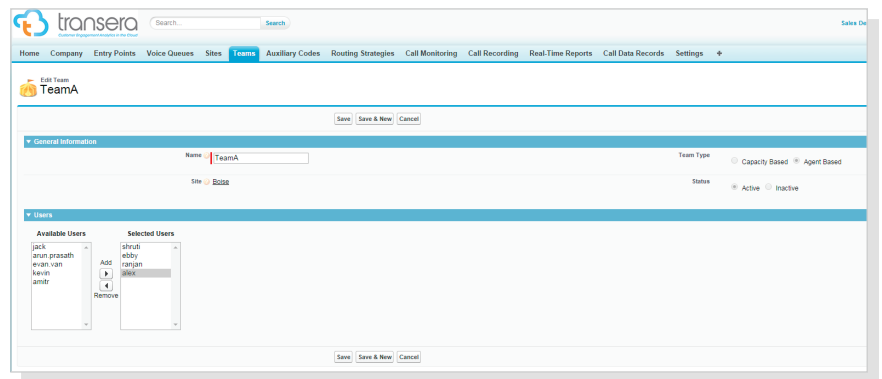
Transera Call Center App for Salesforce provides visibility into customer interactions across channels by adding Call Data Records and Agent Activity Records to the Salesforce database for unified reporting. Your unique call wrap-up codes are captured for resolution analysis. All of the data captured by Transera can be used to build reports using Salesforce's native reporting tools.

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Transera Call Center App for Salesforce™ Sales and Service Clouds

Build and Administer Your Call Center Operations all within Salesforce

With the Transera Call Center App for Salesforce, there is no need to add another application to your infrastructure that requires redundant login, users and administration. Setting up and administering a new call center is done within the Salesforce Administration and Build functions.



Agent, Team and Site Assignments in Salesforce

Agents

Transera call center agents are created and managed within the Salesforce User Administration function just like CRM users. Transera adds the option to specify agents already in Salesforce as phone agents, in addition to their existing CRM, chat and email user options.

Teams

Call Center teams are created and agents assigned to the teams with a simple point, select and click process within the standard Salesforce user interface.

Sites

For the multi-site contact center, sites are defined and agents and teams assigned to them with the same intuitive user interface as teams within Salesforce.

Toll-free numbers

All call center entry points, including toll-free numbers, and their capacity and overflow attributes are defined within the Salesforce Administration functions.

Queues

Calls coming into the call center can be distributed to multiple voice queues to await agent availability. Voice queues, their maximum call and wait time limits, and the resulting behavior when queues overflow are all defined in the Transera Call Center App within Salesforce.

Roles

The Transera Call Center App for Salesforce uses native Salesforce user profiles to grant supervisor and administrator access to the Transera Call Center App. Same with defining teams and agents specific to sales, service and support.

Hours of Operation

For today's world of call centers with agents, teams and sites spread out to different time zones, everyone's hours of operation are defined in the call center Administration within Salesforce.

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Transera Call Center App for Salesforce™ and Service Clouds

Unified Management Visibility, Agility and Control

The Transera Call Center App gives call center management more control and visibility over operations with call center data and reporting integrated with the Salesforce database. With a few simple clicks, management can control operations such as change IVR behavior, alter call routing priorities or reroute traffic to respond to changing conditions quickly for a more agile call center.

IVR Call Flow

Transera delivers a graphical IVR call flow builder in Salesforce to create and define all caller prompts and associated routing and self-service options. API calls to the Salesforce database can be inserted that route and respond to calls based on customer attributes.

Call Routing Rules

The rules that determine how calls are routed to queues and distributed to teams and agents are created and easily modified within Salesforce. For example, rules that route calls based on longest available agent, team and agent priorities or balancing call loads.

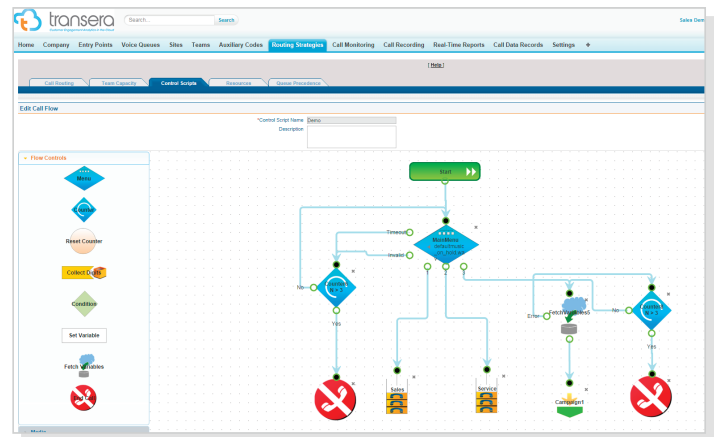
In addition, Transera can perform data and analytics-driven routing using the customer and agent data in any Salesforce object including leads, contacts, accounts, opportunities, cases or an external database. Transera's Contextual Decision Engine can make routing decisions dynamically based on the available data or by using predictive analytics to determine customer propensity and the best available agent based on the desired call outcomes.

Routing Strategies include:

Customer-based routing using data in Salesforce – matching customer to agents or teams based on their need, demographics, customer status, value, or propensity to buy.

Service-level routing – adhering to service commitments such as speed of answer or number of calls per day for a site or team.

Agent based routing – skill-based routing or using Statistical Performance Analytics to score agents' past performance and route calls to the best available agent for a specific task or customer to maximize business outcomes.



IVR Call Flow Builder in Salesforce

Call Center Reporting Using Salesforce Reporting

Transera creates Call Data Records and Agent Activity Records as native Salesforce objects so all the reporting functionality within Salesforce can be leveraged by the call center for reports that combine Salesforce and call center data. In addition, Transera appends the Salesforce lead, case, contact or similar record with call data and custom wrap-up codes.

Recording for Quality Management

The Transera Call Center App for Salesforce centrally records, stores and archives calls all within the Salesforce application — regardless of the agent, site, or outsourcer taking the call — and makes them available to replay for analysis. Custom tags and parameters drive alert warnings and facilitate easy search and retrieval.

Call Monitoring for Quality Management

With the Transera Call Center App for Salesforce, management can silently monitor calls regardless of site or team, to assure quality customer experiences while still in Salesforce. Agents can be coached while on a call or management can join a call in process. Call monitoring schedules can be predefined at the team and agent level and monitoring can be dynamically determined based on Salesforce data about the customer or call.

Get Started Now, It's Easy

See the Transera Call Center App on AppExchange: <http://q-r.to/sDY>
Call 1-800-727-0766 or email salesforceapp@transerainc.com

www.transerainc.com