Five9
® The Intelligent Cloud Contact Center

Five9 WFO Salesforce Connector

Streamlined workflows and simplified contact center operations

Integrate Five9 WFO with your Salesforce digital channels and embed the Five9 WFO user experience within Salesforce to reduce the number of applications that agents and supervisors need to use. This results in streamlined workflows and simplified contact center operations.

The Five9 WFO Salesforce Connector also integrates your Salesforce deployment with Five9 Quality Management (QM), Workforce Management (WFM), and more. Implementing this connector exponentially boosts usability as interaction recording and WFO tools now become part of the overall Salesforce experience.

Implementations of the Five9 WFO Salesforce Connector are industry unique, feature-rich, and out-of-the-box. Integrations can be performed within hours, not days.

Link Recorded Interactions for Playback Within Salesforce

Link voice and digital channel interactions for playback directly within your Salesforce Cases, Contacts, Tasks, Accounts, and more for effortless playback.

Supervisors and agents can view a complete customer event history within the Salesforce user interface, making data easily accessible. This increases productivity and reduces the opportunity for manual errors.

Features

- End to end recording of Salesforce chat and email sessions
- Deep levels of security controls and permissions
- Real-time recording and metadata integration
- Salesforce Single Sign-On (SSO)
- Sophisticated implementation and training

Benefits

- Reduces the opportunity for manual data entry errors
- Boosts usability as Five9 WFO functionality now becomes part of the overall Salesforce experience
- Implementations can be performed within hours, not days, delivering a faster ROI for your organization
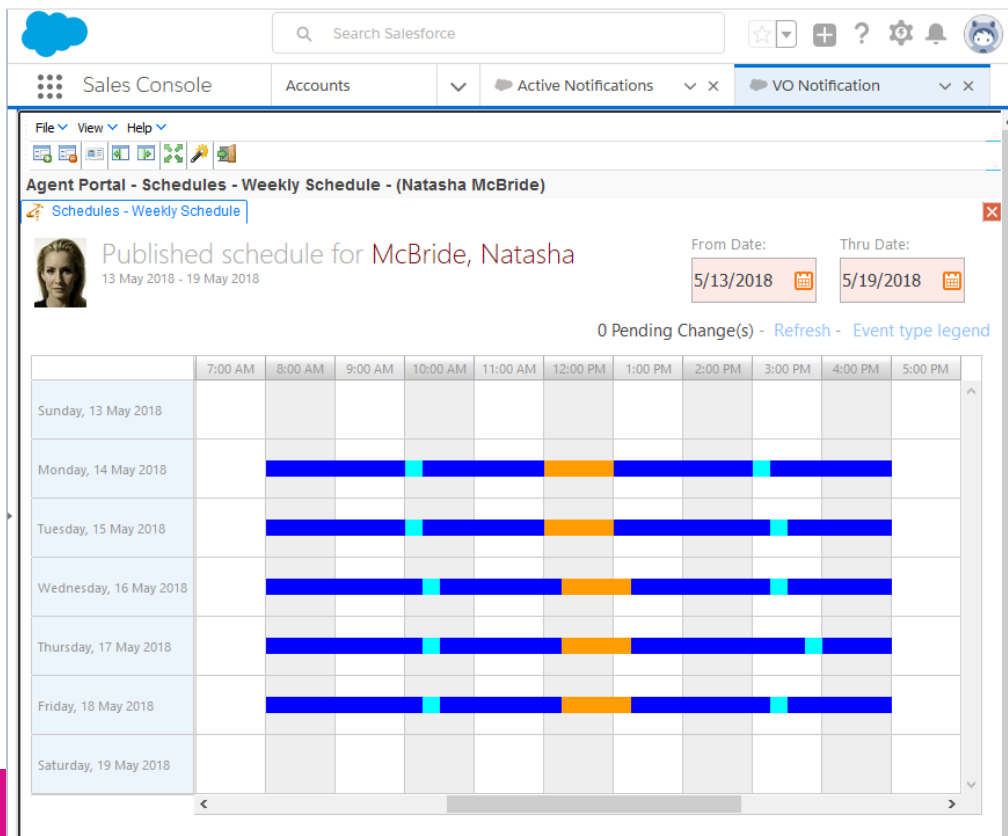- Supervisors and agents who live every day in Salesforce will quickly master Five9 WFO

Figure 1:

Agent Portal workforce management dashboard with current schedules.

Streamline agent and supervisor experience by embedding Five9 WFO within the CRM user interface. Enable WFO to forecast and schedule CRM digital channel demand and evaluate agent performance.

Integrate Salesforce Digital Channels With Five9 Quality Management

Utilize the Five9 WFO Salesforce Connector to capture both transcripts and screen recordings of Salesforce digital channels for quality assurance and training purposes. With the Five9 Salesforce integration you can ensure all your customer interactions, including your digital channels, are WFO enabled and your employee performance and business processes are maximized to improve the overall quality of the service and customer experience.

With the Five9 WFO Salesforce Connector, quality management integration doesn't stop with transcript capture. The Five9 Quality Management screen capture provides the necessary start/stop triggering to record screen-only events of agents drafting email and chat interactions. This allows supervisors to playback and evaluate these interactions similar to traditional voice and screen capture playback and evaluation.

Forecast And Schedule Your Digital Channel Demand

The Five9 WFO Salesforce Connector integrates with WFM deployments too. The connector uses Salesforce APIs to read various tables and compute agent interval data to capture the proper time on task data and workload data for WFM forecasting and scheduling. The data imported and the calculations used to determine time on task and workload vary based on interaction type.

Empower Your Agents

Empower your agents through the embedded agent portal that offers access to agent-side features such as evaluations, reviews, recordings, schedules, shift bids, center stats, and much more.

Empower Your Supervisors

Empower your supervisors with a robust, full-featured, embedded WFO suite. As a key component in Five9 WFO, the management portal offers your leaders access to all the features of the platform.

Empower Your Enterprise

Empower your enterprise with WFO enablement that integrates Salesforce with your Five9 Intelligent Cloud Contact Center deployment and realize a truly differentiated CRM and contact center integration.

Learn More

Want to learn more about how the Five9 WFO Salesforce Connector can empower your agents and supervisors to provide extraordinary customer experiences? To get started, visit **www.five9.com** or call **1-800-553-8159.**
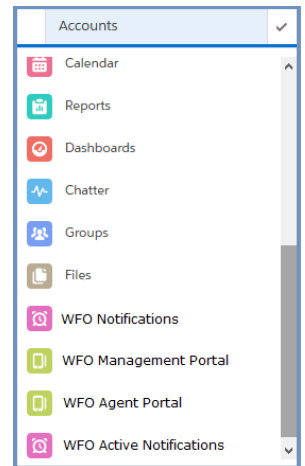

Figure 2:

Integrate WFO with custom Salesforce navigation sets

YOUR COMPANY/CONTACT INFORMATION
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About Five9

Five9 is an industry-leading provider of cloud contact center solutions, bringing the power of cloud innovation to more than 2,000 customers worldwide and facilitating billions of customer engagements annually. Five9 provides end-to-end solutions with digital engagement, analytics, workforce optimization and AI to increase agent productivity and deliver tangible business results. The Five9 platform is reliable, secure, compliant and scalable. Designed to help customers reimagine their customer experience, the Five9 platform connects the contact center to the business while delivering exceptional customer experiences that build loyalty and trust.

For more information visit **www.five9.com** or call **1-800-553-8159.**