

# Consilium UniAgent™ CRM-CTI Connector

Discovery Guide for Cisco Unified Contact Center Express (UCCX) through Cisco SolutionsPlus Program

Overview

The purpose of this discovery guide is to capture and analyze customer requirements for the Consilium/Cisco combined offer to help ensure a smooth and comprehensive implementation.

The document consists of the following sections:

* Consilium UniAgent™ for Salesforce – CCX Edition Discovery Questions
* Consilium UniAgent™ for MS Dynamics CRM – CCX Edition Discovery Questions
* Consilium UniAgent™ for BMC Remedy – CCX Edition Discovery Questions
* Consilium UniAgent™ for Siebel – CCX Edition Discovery Questions
* Consilium UniAgent™ for Other CRMs – CCX Edition Discovery Questions

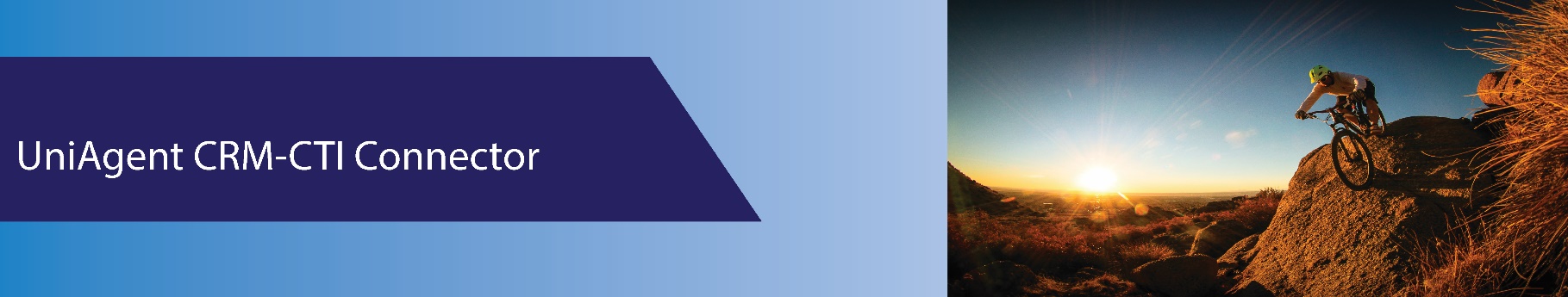
Please email the completed questionnaire to: [splus-support@consiliuminc.com](mailto:splus-support@consiliuminc.com)

Customer Info

Customer Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Customer Email id: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Customer Location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

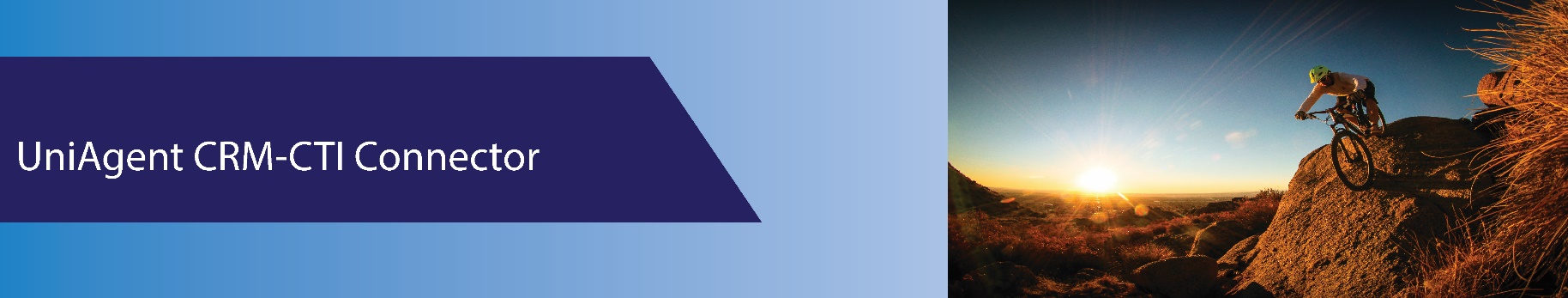
Consilium UniAgent™ for Salesforce – CCX edition Discovery Questionnaire

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| **Salesforce – UCCX** | |
| Which Salesforce edition do you use – Lightning Experience or Salesforce Classic? |  |
| How many users are defined in Salesforce today? |  |
| Is this a multi instance CRM deployment? If so, please provide details. |  |
| What is the version of Cisco’s Unified Contact Center Express (CCX)? |  |
| Do you already have Cisco CCX implemented or is this a new Cisco implementation? |  |
| How many agents are there on CCX? |  |
| Do you use CAD or Finesse as agent desktop application? |  |
| Do you have a single PG or multi PG deployment? |  |
| What is your time frame to integrate Salesforce with CCX? |  |
| Which browsers do you use (please include versions)? |  |
| Do agents use the Salesforce GUI in a single browser window or in multiple browser windows? |  |
| What type of record would you like to display in screen-pop? Contact? Account? Opportunity? Etc. |  |
| What are the unique identifier would you like to use for screen pop? Caller ID? Customer Entered Digits (CED)? |  |
| What are business objectives from the integration: what call and/or business data needs to be passed from UCCX to the SFDC application in the CTI screen-pop? (e.g., caller ID, customer number, …) |  |
| Does UCCX IVR-SFDC database integration need to be implemented as part of the requirements (for instance if any caller-input data has to be validated against SFDC before providing agent service)? |  |
| Please describe a typical call flow including IVR, transfers, work in Salesforce etc. |  |
| Please provide an overview of the business process you are handling with UCCX (helpdesk, customer service, collections, etc.), |  |
| **Omni-channel (Email, Chat) | Voice Logger** | |
| Do you need any integration with email or chat or social media for omnichannel experience? |  |
| Do you need any integration with voice logger for on demand recording – record/pause on demand? If yes, please provide details of the Voice logger solution including – brand, version and API details. |  |
| How many agents handle email/ chat / social media? |  |
| **Outbound Campaign Management** | |
| Any outbound campaign management integration required with the CTI? |  |
| If yes, please provide number of agents for outbound? |  |
| Please provide the number of dialler ports used for outbound? |  |
| UCCX license details (enhanced, premium)? |  |
| **Salesforce Omnichannel** | |
| Any integration required between CTI application and Salesforce Omnichannel |  |



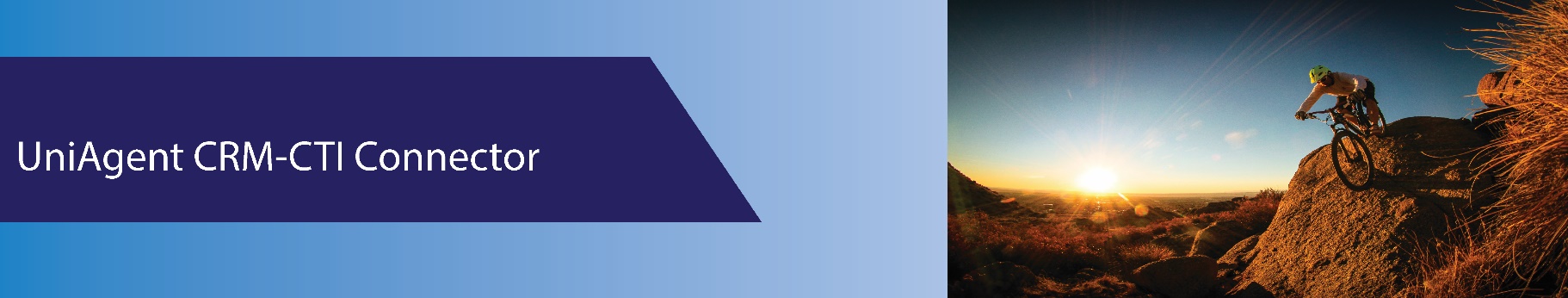
# Consilium Uniagent™ for Microsoft dyNAMICS crm – CCX Edition Discovery questionnaire

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| **Microsoft Dynamics - UCCX** | |
| Which version of MS Dynamics CRM do you use (2008, 2011, 2013, 2015, 2016 or 365)? |  |
| Is it online or on premise? |  |
| How many users are defined in Microsoft Dynamics CRM today? |  |
| Is this a multi instance CRM deployment? If so, please provide details. |  |
| What is the version of Cisco’s Unified Contact Center Express (CCX)? |  |
| Do you already have Cisco CCX or is this a new Cisco implementation? |  |
| How many agents are there on CCX? |  |
| Do you use CAD or Finesse as agent desktop application? |  |
| Do you have a single PG or multi PG deployment? |  |
| What is your time frame to integrate MS Dynamics CRM with CCX? |  |
| Which browsers do you use (please include versions)? |  |
| Do agents use the Microsoft Dynamics GUI in a single browser window or in multiple browser windows? |  |
| What type of record would you like to display in screen-pop? Contact? Account? Opportunity? Etc. |  |
| What are the unique identifier would you like to use for screen pop? Caller ID? Customer Entered Digits (CED)? |  |
| Please describe a typical call flow including IVR, transfers, work in MS Dynamics etc. |  |
| Please provide an overview of the business process you are handling with UCCX (helpdesk, customer service, collections, etc.), |  |
| Does UCCXE IVR-MS Dynamics database integration need to be implemented as part of the requirements (for instance if any caller-input data has to be validated against MS Dynamics before providing agent service)? |  |
| **Omni-channel** | |
| Do you need any integration with email or chat or social media for omnichannel experience? |  |
| Do you need any integration with voice logger for on demand recording – record/pause on demand? If yes, please provide details of the Voice logger solution including – brand, version and API details. |  |
| How many agents handle email/ chat / social media? |  |
| **Outbound Campaign Management** | |
| Any outbound campaign management integration required with the CTI? |  |
| If yes, please provide number of agents for outbound? |  |
| Please provide the number of dialler ports used for outbound? |  |
| UCCX license details (enhanced, premium)? |  |



# Consilium uniagent™ for bmc remedy – ccX edition discovery questionnaire

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| **BMC Remedy - UCCX** | |
| Please share the exact BMC Remedy product name, version of the Remedy agent application(s) -- get this from Help > About, and screenshot of the BMC Remedy user application |  |
| Is it hosted or on-premise? |  |
| How many users are defined in BMC Remedy today? |  |
| What is the version of Cisco’s Unified Contact Center Express (CCX)? |  |
| Do you already have Cisco CCX implemented or is this a new Cisco implementation? |  |
| How many agents are there on CCX looking for CTI integration? |  |
| Do you use CAD or Finesse as agent desktop application? |  |
| Do you have a single PG or multi PG deployment? |  |
| What is your time frame to integrate BMC Remedy with CCX? |  |
| Which browsers do you use (please include versions)? |  |
| What type of record would you like to display in screen-pop? Contact? Account? Opportunity? etc. |  |
| What are the unique identifier would you like to use for screen pop? Caller ID? Customer Entered Digits (CED)? |  |
| What are business objectives from the integration: what call and/or business data needs to be passed from UCCX to the BMC Remedy application in the CTI screen-pop? (e.g., caller ID, customer number, …) |  |
| Does UCCX IVR-BMC Remedy database integration need to be implemented as part of the requirements (for instance if any caller-input data has to be validated against BMC Remedy before providing agent service)? |  |
| Please describe a typical call flow including IVR, transfers, work in BMC Remedy etc. |  |
| Please provide an overview of the business process you are handling with UCCX (helpdesk, customer service, collections, etc.), |  |
| **Omni-channel (Email, Chat) | Voice Logger** | |
| Do you need any integration with email or chat or social media for omnichannel experience? |  |
| Do you need any integration with voice logger for on demand recording – record/pause on demand? If yes, please provide details of the Voice logger solution including – brand, version and API details. |  |
| How many agents handle email/chat/social media? |  |
| **Outbound Campaign Management** | |
| Any outbound campaign management integration required with the CTI? |  |
| If yes, please provide number of agents for outbound? |  |
| Please provide the number of dialler ports used for outbound? |  |
| UCCX license details (enhanced, premium)? |  |

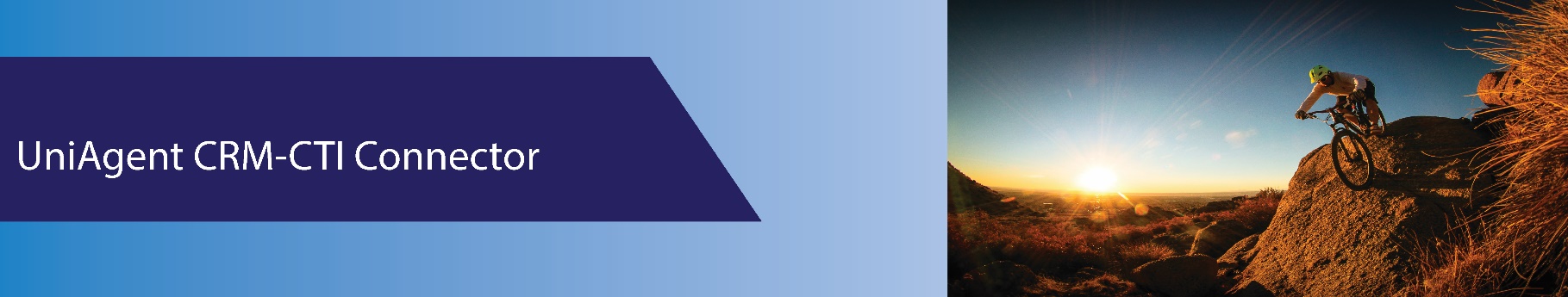


# CONSILIUM UNIAGENT™ FOR SIEBEL – CCX Edition dISCOVERY qUESTIONNAIRE

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| **Siebel CRM - UCCX** | |
| Please provide the exact Siebel product name, version of the Siebel agent application(s) and a screenshot of the Siebel user application |  |
| Is it hosted or on-premise? |  |
| How many users are defined in Siebel today? |  |
| What is the version of Cisco’s Unified Contact Center Express (CCX)? |  |
| Do you already have Cisco CCX implemented or is this a new Cisco implementation? |  |
| How many agents are there on CCX looking for CTI integration? |  |
| Do you use CAD or Finesse as agent desktop application? |  |
| Do you have a single PG or multi PG deployment? |  |
| What is the time frame to integrate Siebel with CCX? |  |
| Which browsers do you use (please include versions)? |  |
| What type of record would you like to display in screen-pop? Contact? Account? Opportunity? etc. |  |
| What are the unique identifier would you like to use for screen pop? Caller ID? Customer Entered Digits (CED)? |  |
| What are business objectives from the integration: what call and/or business data needs to be passed from UCCX to the Siebel application in the CTI screen-pop? (e.g., caller ID, customer number, …) |  |
| Does UCCX IVR-Siebel database integration need to be implemented as part of the requirements (for instance if any caller-input data has to be validated against Siebel before providing agent service)? |  |
| Please describe a typical call flow including IVR, transfers, work in Siebel etc. |  |
| Please provide an overview of the business process you are handling with UCCX (helpdesk, customer service, collections, etc.), |  |
| **Omni-channel (Email, Chat) | Voice Logger** | |
| Do you need any integration with email or chat or social media for omnichannel experience? |  |
| Do you need any integration with voice logger for on demand recording – record/pause on demand? If yes, please provide details of the Voice logger solution including – brand, version and API details. |  |
| How many agents handle email/Chat/Social media? |  |
| **Outbound Campaign Management** | |
| Any outbound campaign management integration required with the CTI? |  |
| If yes, please provide number of agents for outbound? |  |
| Please provide the number of dialler ports used for outbound? |  |
| UCCX license details (enhanced, premium)? |  |

CONSILIUM UNIAGENT™ FOR OTHER CRM – CCX EDITION DISCOVERY QUESTIONNAIRE

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| **Other CRM's (Oracle Teleservices, Pipedrive, Sugar, ServiceNow, SAP, Oracle Flexcube, JDEdwards, IBM Websphere, PIVOTAL, Authority, Redknee, CA UniCenter, BMC Remedyforce etc.) - CCX** | |
| Please provide the exact CRM product name, version, and screenshot of the application? |  |
| Is it hosted or on-premise? |  |
| How many users are defined in the CRM today? |  |
| What is the version of Cisco’s Unified Contact Center Express (CCX)? |  |
| Do you already have Cisco CCX implemented or is this a new Cisco implementation? |  |
| How many agents are there on CCE looking for CTI integration? |  |
| Do you use CTIOS or Finesse as agent desktop application? |  |
| Do you have a single PG or multi PG deployment? |  |
| What is your time frame to integrate CRM with CCE? |  |
| Which browsers do you use (please include versions)? |  |
| What type of record would you like to display in screen-pop? Contact? Account? Opportunity? Etc. |  |
| What are the unique identifier would you like to use for screen pop? Caller ID? Customer Entered Digits (CED)? |  |
| What are business objectives from the integration: what call and/or business data needs to be passed from UCCE to the CRM application in the CTI screen-pop? (e.g., caller ID, customer number, …) |  |
| Does UCCE IVR-CRM database integration need to be implemented as part of the requirements (for instance if any caller-input data has to be validated against CRM before providing agent service)? |  |
| Please describe a typical call flow including IVR, transfers, work in CRM etc. |  |
| Please provide an overview of the business process you are handling with UCCE (helpdesk, customer service, collections, etc.), |  |
| **Omni-channel (Email, Chat) | Voice Logger** | |
| Do you need any integration with email or chat or social media for omnichannel experience? |  |
| Do you need any integration with voice logger for on demand recording – record/pause on demand? If yes, please provide details of the Voice logger solution including – brand, version and API details. |  |
| How many agents handle email/chat/social media? |  |
| **Outbound Campaign Management** | |
| Any outbound campaign management integration required with the CTI? |  |
| If yes, please provide number of agents for outbound? |  |
| Please provide the number of dialler ports used for outbound? |  |
| UCCX license details (enhanced, premium)? |  |



About Consilium

Consilium conceives, develops and delivers enterprise software for unified communications (UC) and contact centers to power transformative Customer Experience Management (CEM.)  Our software adds CRM integration, service automation and insight to leading UC vendors.  Consilium UniCloud™, UniAgent™, UniCampaign™ and UniDashboard™ products enhance the performance and productivity levels of enterprise customers and service providers.  Our solutions are used by more than 500 companies, banks, telcos, and governments in 70 countries across six continents.  Consilium Software was founded in Singapore, with software development and engineering labs in India, and subsidiaries and branch offices in Malaysia (Kuala Lumpur), Taiwan (Taipei City), the Philippines (Manila), Thailand (Bangkok), Australia (Melbourne) and Canada (Toronto.)

If you require any assistance, please reach out to us at [splus-support@consiliuminc.com](mailto:splus-support@consiliuminc.com)

