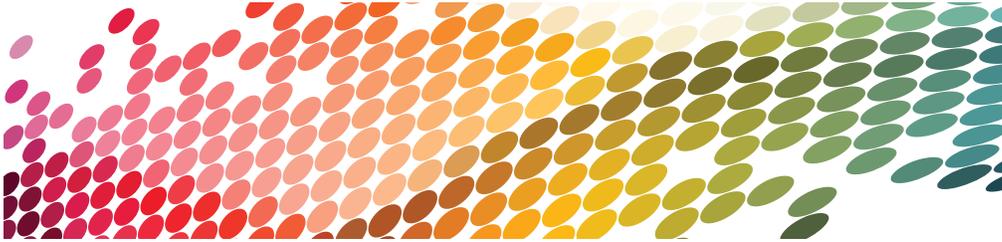




Integrating Call Recording with Other Applications



Engage Desktop Analytics software optimizes workflow by pulling customer data from CRM and other applications and linking it to contact recordings to build and maintain complete and convenient views of your customers' experiences and journeys.

The Challenge

Within her organization, Amanda's team uses Engage call recording from TelStrat to record 100% of their contact center and back office calls. Her team uses a CRM application during the phone calls so that data can be entered concerning the account. With the recordings located on one server and in archive, and the CRM application running on a different server, she needs a way to be able to associate the two. She needs the entire customer interaction to be available from a single application.

The key is to be able to tie the CRM activity to the call recording activity. Searching for the recordings is cumbersome for her team and she wants to streamline this process so that the team doesn't have to write down data from one application to be able to search for the recording in another.

Upon reaching her TelStrat representative, Amanda is pleased at the options available to tie the two disparate systems together and make all the data easily available. TelStrat understands the issue and has already created solutions from experience with other customers.



Engage Desktop Analytics software also makes it easy to control pause and resume of interaction recording to meet compliance standards automatically - without risk of user oversight. Engage software redacts sensitive data in both voice and screen recordings for compliance with laws requiring contact centers to inform customers, record calls, and black out/not record sensitive information.



For customers with their own technical staff, there is another option for data integration with other applications. A Web Services API is included with every Engage solution at no additional charge. This API enables access to all of the database information and fields within the Engage application and can be used to link with CRM and other applications.

For more information visit us at: www.telstrat.com/service/analytics/ or contact us at 972.543.3500



The Solution

TelStrat explains that within the Engage database there are 16 customizable fields which can appear as columns of information that appear in the Engage playback log. The field labels are user-defined such as “Account Number” or “Customer Name”, and any information placed in these fields becomes a permanent part of the recording metadata and is searchable.

Engage also supports a URL to the specific recording for that transaction. A link can be copied from the Engage solution to fields within the CRM so that the user need only click the link and as long as they have access to the network containing the recording server, the recording will play with full media player control.

The Engage Desktop Analytics (DA) application can be used to perform these functions and is customized by TelStrat for each specific customer environment. A TelStrat Sales Engineer (SE) works with the customer to learn which fields are to be integrated with Engage. Screen shots are taken so that a complete package is made available to the TelStrat developer. Information in the designated fields will be automatically copied into the custom fields within the Engage database. A copy of the URL to the recording is copied into the designated fields within the CRM.

Once development is complete the solution is deployed to the site. The custom software is loaded onto each workstation that will use the DA application as well as the recording server that will respond to the commands.

Now when Amanda looks at her CRM upon completion of a phone call she sees the URL to the recording. She clicks the link and the Engage media player opens on her computer and she hears the recording without logging into the Engage solution.

When she logs into Engage, for each recording she sees the information within the custom fields. She executes a search for a customer name the list of recordings for that customer appear with the other recordings filtered out of the display. The information exchange between the CRM and the Engage call recording solution is seamless and increases productivity.