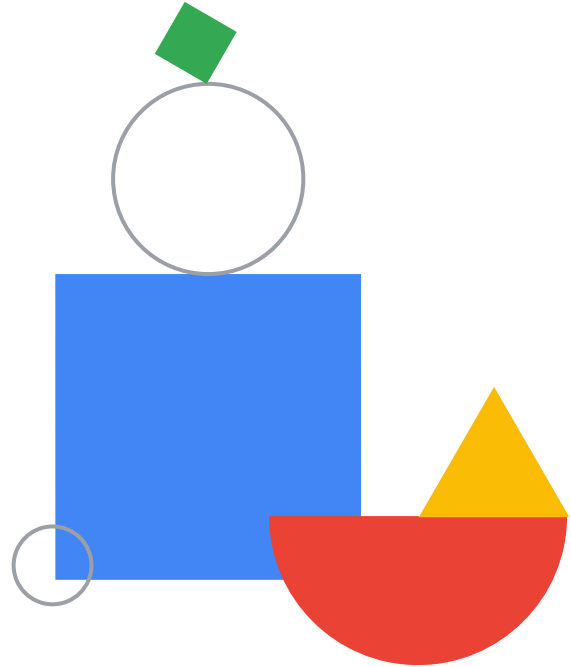


Integrations Overview Part I

Admin Course



A blue square containing the white text '01' in the bottom-left corner. To the right of the square is a yellow triangle pointing downwards.

01

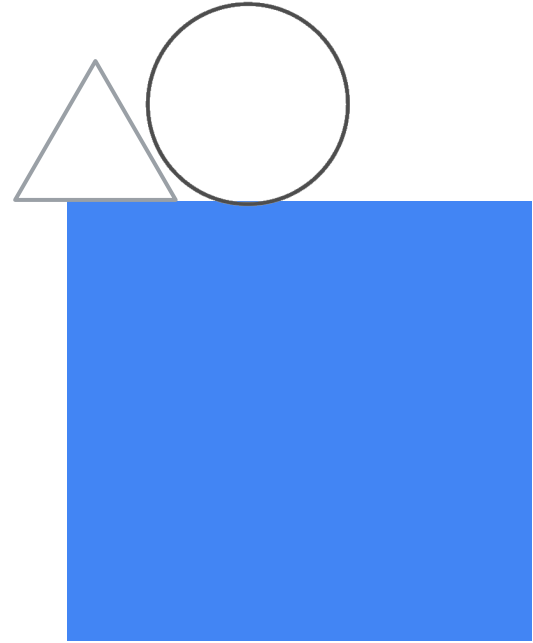
Integration possibilities
with CCAIP

Introduction

CCAIP is a versatile platform that can be integrated into many other programs/systems to make your contact center efficient and effective! Some of these include:

- CRM
- Microsoft Teams
- Secure payments
- External storage
- QM
- WFM
- Data connectivity platforms
- Dialer platforms

CRM Settings and Configuration



CRM overview

Out of the box, CCAIP can integrate with several of the standard CRM systems. Depending on the CRM you are using, the integration requirements will be different. Most customers will have a designated CRM manager, specialist, or architect that will assist you as the admin. They will help facilitate the integration.

Within any CRM integration, a link needs to happen in order to allow the API calls to flow back and forth between the applications. From a CCAIP perspective, the company key and secret from **Developer Settings** will play a part. From the CRM perspective, there will generally be a token, or similar key/secret pairs to be added to **Developer Settings** during the integration.

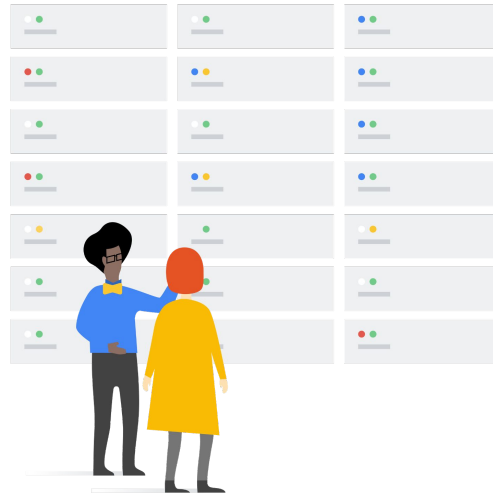
The resource in charge of setting up the integration will need to have system admin level access to the CRM as well as admin level access in CCAI Platform.

Regardless of the CRM you are integrating with and the setup that takes place in **Developer Settings**, as an admin you will help determine the CRM configuration options in **Operation Management** (more on that in the next slide).

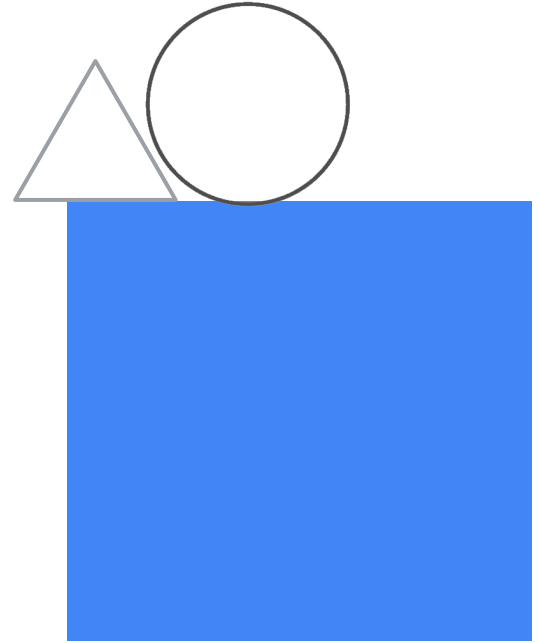
Admin CRM settings in Operation Management

Each of the different CRM integrations will present different setting options within Operation Management. Many of these settings will be determined during the implementation phase of the project. Please collaborate with your internal developers and implementation team members to determine how you want your CCAIP tenant to interact with your CRM.

Please visit the [support center](#) for more information on your specific CRM.

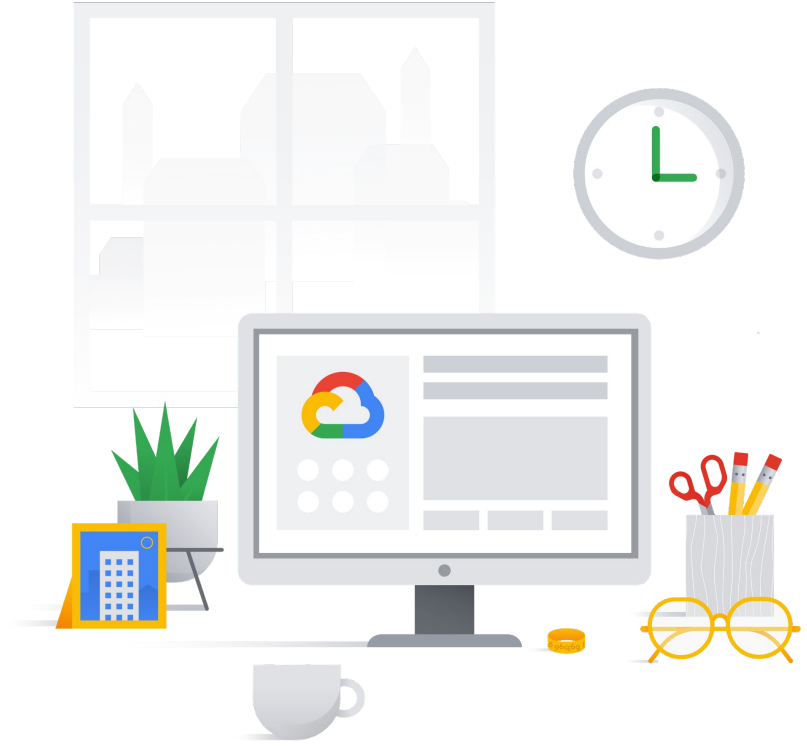


Out of the Box CRM Integrations



CRM Options

- The next series of slides will discuss the out of the box CRMs that are currently supported by CCAIP for integration. These include:
 - Salesforce
 - Zendesk
 - Kustomer
 - MS Dynamics
 - ServiceNow
 - HubSpot
 - FreshDesk
 - Oracle



Salesforce

Salesforce is one of the most common CRMs used and is fairly expansive in the features it offers. Due to this, CCAIP also offers lots of flexibility with integration options.

With a [Salesforce integration](#) your developer can set up these additional features for use in CCAIP:

- Custom Surveys
- Agent Status Inheritance
- Session Object Mapping
- Custom Field Mapping (through VAs or SDKs only)



Zendesk

Zendesk is another popular option among CRMs. With a [Zendesk integration](#) your developer can set up these additional features for use in CCAIP:

- Flexible OB Dialing
- API Batching
- Custom Field Mapping (through VAs or SDKs only)



zendesk

Kustomer

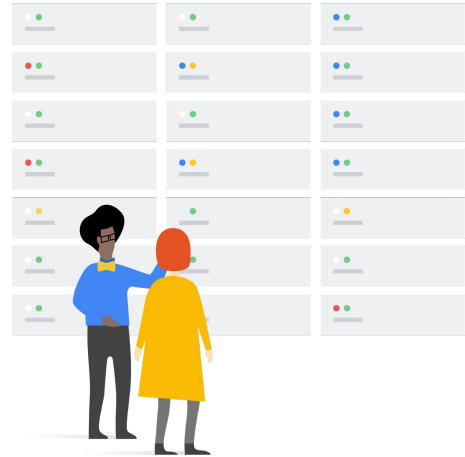
[Kustomer](#) is a simple integration option for CCAIP. Agents can log into CCAIP and accept calls and chats from their Kustomer workspace. When agents receive calls through the adapter, Kustomer automatically creates and logs new customers and conversations. This allows agents to view, search, and report on call and chat data. Please follow the steps in the documentation linked above to setup the connection.



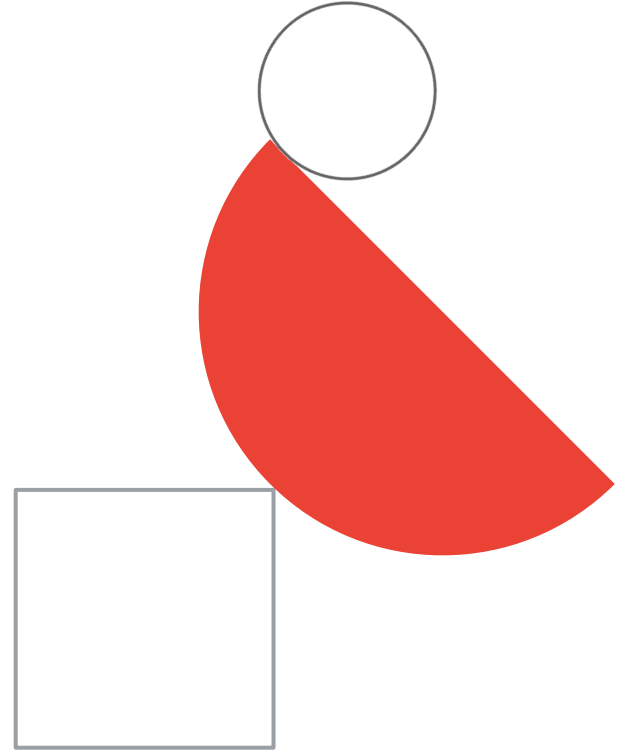
Remaining CRMs

The remaining CRMs in the listed below are all supported. You can learn more about the integration process for those CRMs by visiting the technical documentation console.

- [MS Dynamics](#)
- [ServiceNow](#)
- [HubSpot](#)
- [FreshDesk](#)



Custom CRM integration

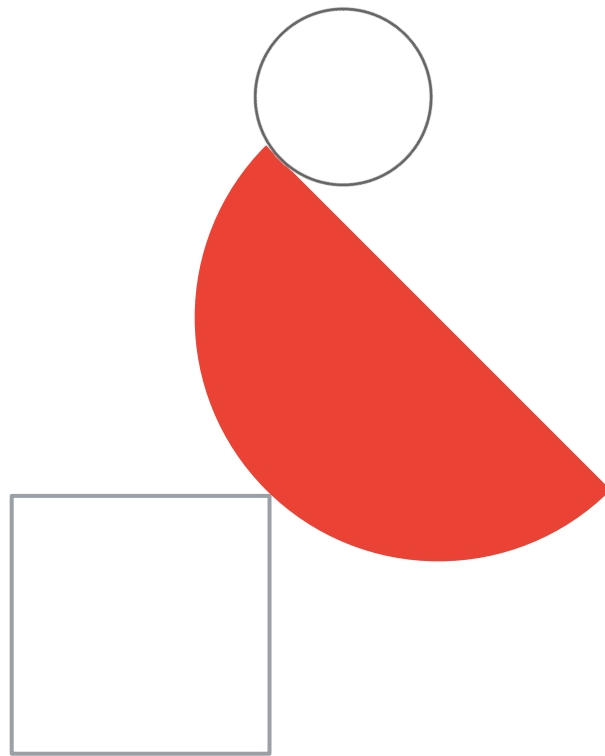


Custom CRM

- Integrating a [custom CRM](#) opens up a series of API endpoints that can communicate with other APIs in order to create a communication of commands to act in creating accounts/records and pairing data within (i.e. phone number, email, ticket/account numbers, etc.).
- Custom CRM integrations are a popular option for customers because it allows for a lot of flexibility in the development and control of your CRM.
- Custom CRM integrations are arguably the most complex to setup, so please speak with your internal developers and implementation partners/team to discuss this option.



External Storage Integration




External storage and CCAIP

- You may chose to utilize external storage if:
 - you do not want to use a CRM
 - you have a CRM integrated but you want to store call recordings and other associated assets outside of your CRM
- CCAIP does not store any consumer details within the platform by default. As such, you can set up an external storage bucket that CCAIP can transfer interaction data to such as call recordings, chat transcripts, voicemail records, metadata, files, and more.
- External storage can be set up to be delivered via SFTP connected folders, a GCP bucket, or an AWS bucket. Google highly recommends a GCP bucket for an optimal experience.
- External storage would not generally be set up by you as the admin, but it may be pertinent for you to know how to access the data for review, QM, etc. You would also want to know who on your internal team will be responsible for the upkeep of the external storage location.

External Storage

This section in **Developer Settings** displays an example of an external storage configuration that uses a GCP bucket. Regardless of the external storage used, you as the admin must determine if the files will be stored as .wav or .mp3. From there you can choose if it will be stored in SFTP, Google Cloud bucket, or AWS bucket. Once you've selected the options you prefer, your developer will set up the authentication method and connection based on the method selected.

External Storage ⓘ

On 

Audio Format

☒ MP3 ☐ WAV

Server Setup

☐ SFTP Server ☒ Google Cloud


Authentication Method

☒ Service Account (Bucket Owner) ☐ OAuth2

Bucket Name

external_storage_ccaipamber

Key (JSON File)

 Upload key
File Uploaded

External Storage

This section in **Developer Settings** displays an example of an external storage configuration options. For each selection checked, you generate a folder within your storage location for each of the categories of content.

If you select the CRM storage box, then those files sent to external storage will also be stored to the CRM that is integrated into CCAIP.

https://storage.googleapis.com/storage/v1/b/external_storage_ccaipamber/o/

<input checked="" type="checkbox"/>	Call Recordings	voice-recordings/{simple_session_type}-{session_id}
<input checked="" type="checkbox"/>	Chat Transcripts	chat-transcripts/{simple_session_type}-{session_id}
<input checked="" type="checkbox"/>	Voicemails	voicemails/{upload_year}/{upload_month}/{upload_day}/{simple_session_type}-{session_id}
<input checked="" type="checkbox"/>	Photos	media/{upload_year}/{upload_month}/{upload_day}/{simple_session_type}-{session_id}-{file_type}-{file_id}
<input checked="" type="checkbox"/>	Videos	media/{upload_year}/{upload_month}/{upload_day}/{simple_session_type}-{session_id}-{file_type}-{file_id}
<input checked="" type="checkbox"/>	Co-browse	co-browse-data/{upload_year}/{upload_month}/{upload_day}/survey-{simple_session_type}-{session_id}
<input checked="" type="checkbox"/>	Metadata	metadata/{upload_year}/{upload_month}/{upload_day}/{simple_session_type}-{session_id}
Email		
<input checked="" type="checkbox"/>	Email Content	email-content/{upload_year}/{upload_month}/{upload_day}/{simple_session_type}-{session_id}-{file_type}-
<input checked="" type="checkbox"/>	Email Attachments	email-media/{upload_year}/{upload_month}/{upload_day}/{simple_session_type}-{session_id}-{file_type}-{f
<input checked="" type="checkbox"/>	Email Metadata	email-metadata/{upload_year}/{upload_month}/{upload_day}/{simple_session_type}-{session_id}

CRM Storage

☐ Also send (selected) session files to the CRM ⓘ

Multiple Call Recordings

☒ Merge ⓘ

☐ Separate ⓘ