

CRM integrations

Name the adapter. Date the version. A blank screen with live voice is a different channel.

The adapter family The technical requirements list Plus adapters for Agent Desktop Toolkit, Epic, Microsoft Dynamics 365, NetSuite, Oracle, Salesforce, ServiceNow, and Zendesk. They use HTTPS and Secure WebSocket. The desktop page says a pre-built adapter and Plus share the same underlying technology, and that a CRM SDK exists when you bring your own CRM.

Salesforce versions move The technical requirements fetched for this lab say the Salesforce managed package is 2.46, SAML 2.0 is supported, and Lightning CTI is supported on Sales Cloud and Service Cloud for Professional, Enterprise, Unlimited, and Performance. Lightning Experience is supported for the Plus adapter. ServiceNow releases are named The same PDF says the ServiceNow Plus adapter supports the Service Operations and Configurable workspaces, and names the Australia, Zurich, and Yokohama releases. Those names are a support list with a date on it, like the Salesforce package. The rest of the named CRMs Dynamics 365, Zendesk, Oracle, NetSuite, and Epic are in the same Plus adapter list as Salesforce and ServiceNow. The PDF does not give this lab a package number for each of them. Absence of a number here is not absence of an adapter. SDK and connectors when there is no adapter The API product page lists a CRM SDK and web connectors beside the CTI, configuration, reporting, and statistics web services, plus Web2Campaign. The desktop page says bring your own CRM with the SDK. Screen pop down, voice up This is the signature adapter incident. The caller is heard. The record is not on screen. Causes you can cite: WSS blocked, TLS 1.1, the wrong CRM chapter, an unassigned campaign profile that was supposed to control pop-up behavior, or a connector pointed at a dead URL. Salesforce modules inside the IVR The IVR modules chapter includes a Salesforce module and an SFDC Einstein module, plus Contact Update and Lookup Contact Record. Those run in the script, before an agent exists. They are not the Plus adapter the agent uses after connect.

Sources and go deeper

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