

Integrates existing phone systems with leading CRMs

Key Features



Click-to-Dial

Dial automatically when any phone field is clicked.



Screen Pop

Quickly show caller information before a call is connected.



Automated Call Logging

Rapidly add call notes with configurable log templates and wrap-up codes.



CRM Screen Transfer

Easily share information and related objects with transferred calls.



Click-to-Create a Case

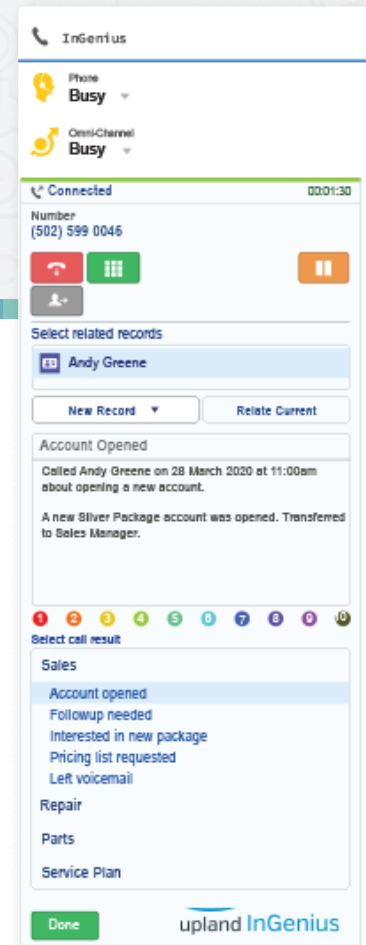
Create a new case and relate it to a caller automatically.



Intelligent Dialing

Connect successfully no matter what area or format phone numbers are in.

Upland InGenius easily adapts to the unique CRM and telephony workflow requirements of different organizations.



servicenow



Supported CRMs

- + Microsoft Dynamics 365
- + Salesforce
- + ServiceNow

Supported Phone Systems

- + Asterisk
- + Avaya
- + Cisco
- + Genesys
- + Mitel
- + Twilio

★★★★★ Upland InGenius is a 5-star app on the Salesforce AppExchange®

Why Upland InGenius?

Enterprise Proven

Choose a solution with the stability and scalability used by Fortune 500 companies. Upland InGenius needs no desktop install, centralizes user management and simultaneously integrates with multiple phone systems. Your project is guaranteed with a no-risk trial.

Secure

Keep your information secure with infrastructure designed to protect to the highest standards. With Upland InGenius, all data stays within your firewall and no access is needed by the computer telephony integration server.

Flexible

Decide how you want computer telephony integration to work for your advisors. Use advanced configuration capabilities with your existing call queues, routing, IVR and workflows to easily fulfill your unique requirements.

Experienced

Access unmatched expertise on connecting telephony and CRMs. Upland InGenius is focused solely on computer telephony integration and has a team of experts dedicated to innovating next generation CTI within a fully-owned technology stack.

Upland InGenius offers certified integration between the leading telephony platforms and Microsoft Dynamics 365, Salesforce or ServiceNow



World-class contact centers choose Upland InGenius to drive agent productivity



For more information on Upland InGenius, visit uplandsoftware.com/ingenius

About Upland Software

Upland Software (Nasdaq: UPLD) is a leader in cloud-based enterprise work management software. Upland provides seven enterprise cloud solution suites that enable more than one million users at over 9,000 accounts to win and engage customers, automate business operations, manage projects and IT costs, and share knowledge throughout the enterprise. All of Upland's solutions are backed by a 100 percent customer success commitment and the UplandOne platform, which puts customers at the center of everything we do.