upland InGenius

Integrate your existing phone system into Salesforce

salesforce

InGenius

Phone
Reserved 00:00:03

Omni-Channel
Ready

Name or number

| 2d7h | Maintenance guidelines f... 00001016 | Low New |
| Decline | | Accept |

| 2d7h | Design issue with mecha... 00001024 | Low New |
| Decline | | Accept |

Inbound Call

Number
1011

Answer

upland InGenius
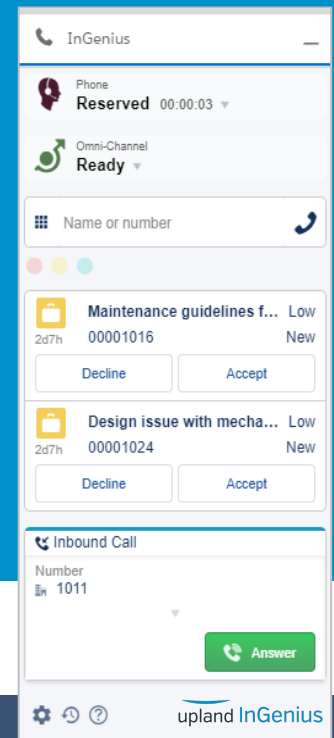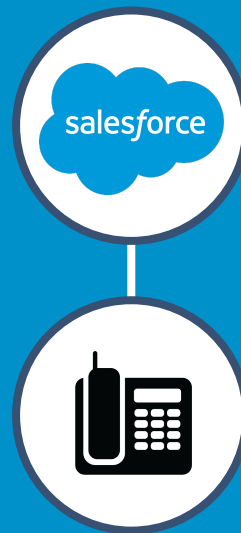
AVAYA   **CISCO**   **GENESYS**   **Mitel**   **twilio**   **Asterisk**

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.

Omni-Channel
Intelligently blend voice and digital channels directly in Salesforce® Lightning or Classic.

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.

Enhanced Call Reports
Obtain accurate and consistent call data and performance metrics within Salesforce.

Preview Dialer
Get context before calls connect for more successful outbound sales.

Pop to Lightning Flow
Launch a workflow from an incoming call for a simplified agent experience.

Pop Out
Use the InGenius interface in a new browser window.

Chatbot Escalation
Easily escalate Salesforce Einstein Bot chats to a phone agent.

InGenius blends voice and digital channels, easily adapting to unique CRM and telephony workflow requirements.

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

Why InGenius?

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

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

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

Experienced
Access unmatched expertise on connecting telephony and CRMs. 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.
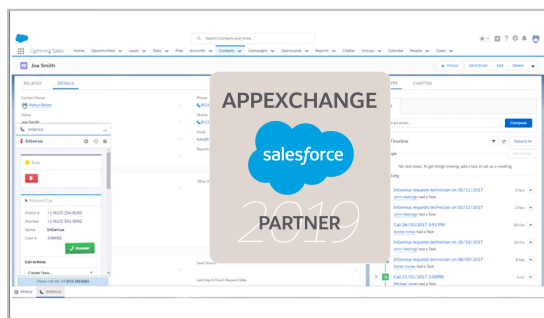
InGenius Innovates with Salesforce
InGenius is a Salesforce AppExchange partner and an original key contributor to the Open CTI definition.

The InGenius team has a commitment to continuous innovation with Salesforce. The latest product features include support for Financial Services Cloud, High Velocity Sales, Twilio phones and a voice escalation function from Einstein Bot.

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

Expedia®

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RENAULT

UWM
UNITED WHOLESALE MORTGAGE

Veeam

ZURICH

upland
InGenius

www.ingenius.com
+1 613.591.9002 x3000
sales@ingenius.com

InGeniusSW
@InGeniusSW
ingeniussw