

CRM Integration

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Data Sheet



LIVEPERSON

Introduction

The LivePerson platform can be integrated with other CRM systems (for example, Siebel, Salesforce, Vantive etc.) to enable customer service representatives (CSR) to obtain a complete picture of customer interaction history and increase customer satisfaction levels. LivePerson supports the following two-way integrations:

- ◆ Exporting chat transcripts and related data into the CRM system according to any predefined key.
- ◆ Auto-populate and present CRM screens based on information that is passed via the LivePerson Agent Console using pre-chat surveys or custom variables.

How it Works

Data Export

LivePerson provides an API that enables the automatic export of chat transcripts according to a pre-defined XML format. All chat transcripts and chat session data is available for export. The following two main alternatives can be used for data export implementation:

- ◆ **Batch Processing:** Enables the customer to schedule calls to the LivePerson server, which returns the transcripts in the pre-defined XML format. This process can take place once a day or within any other selected time interval.
- ◆ **Online Processing:** Exporting each session in real time as it ends. This process is managed by the LivePerson gateway.

Pre-Population of Customer Information

The LivePerson Agent Console can be configured to include external CRM web forms. Alternatively, the LivePerson server can communicate in real time with other CRM applications to enable the pre-population of CRM customer forms.

Pre-defined user identifiers can be used to pass visitor information from other back-end systems. Such identifiers can be obtained either by using LivePerson's pre-chat survey or custom variables.

Using the pre-defined user identifier (e.g., phone number, email, or social security number), the appropriate CRM client screens can be pre-populated. The operator can then have immediate access to the CRM information for the visitor. In addition, any parameters passed via the LivePerson solution or manually filled by the operator can be submitted directly to the CRM system at the end of each chat session.



LIVEPERSON

The following figure demonstrates the integration of a Salesforce CRM with the LivePerson Agent Console. The Agent Console can be integrated with many other CRM applications.

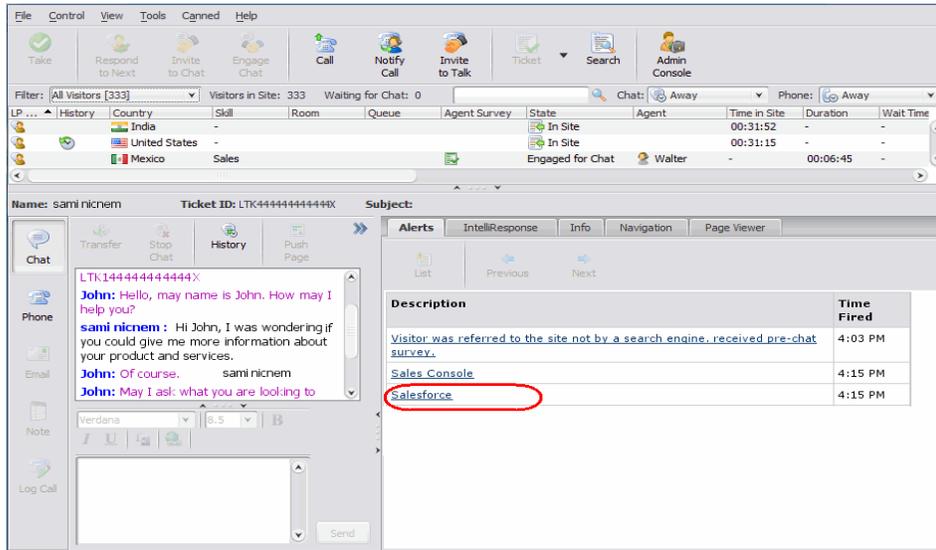


Figure 1-1: Salesforce link in the Alert Tab in the Agent Console

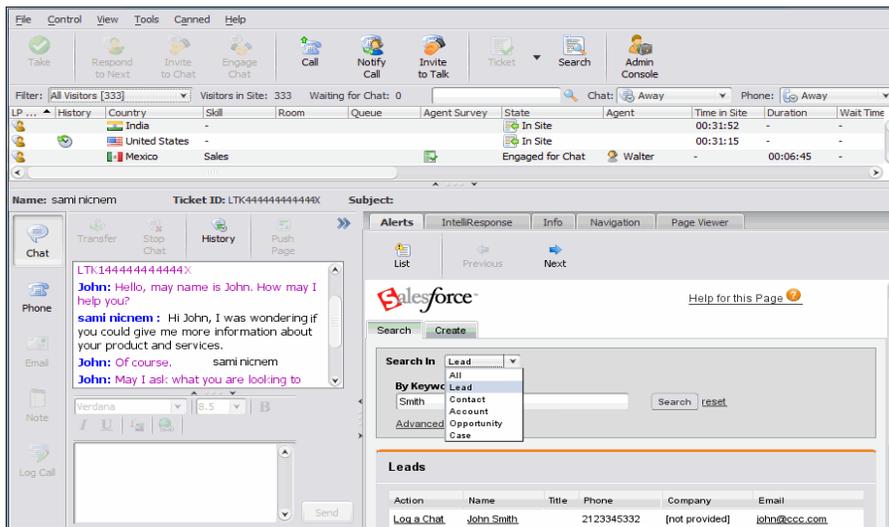


Figure 1-2: Visitor Records with Chat Transcripts

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