

InGenius Connector Enterprise For Salesforce.com

Technology Overview

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TRADEMARKS

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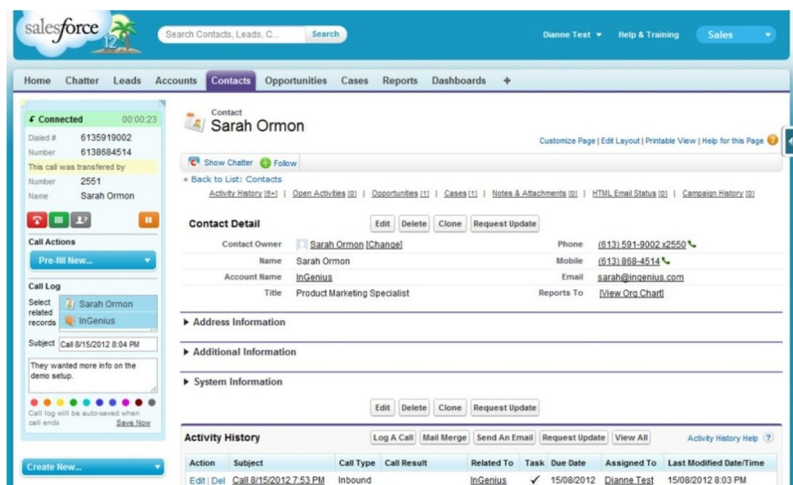
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What is InGenius Connector Enterprise?

InGenius Connector Enterprise (ICE) is an enterprise-level Computer-Telephony Integration (CTI) product designed to connect your phone system with Salesforce.com. Initially ICE will support Cisco phone systems but will soon be available for a range of telephony systems.

One of the most important features of ICE's integration with Salesforce.com is that it can be deployed with no desktop install required for any Salesforce.com users! This means that rolling out complete telephony integration to any number of Salesforce.com users is as simple as deploying the server, and configuring a Salesforce.com "Call Center."

ICE connects directly to switch, on-site, controlling all the phones using standard third-party call control mechanisms.

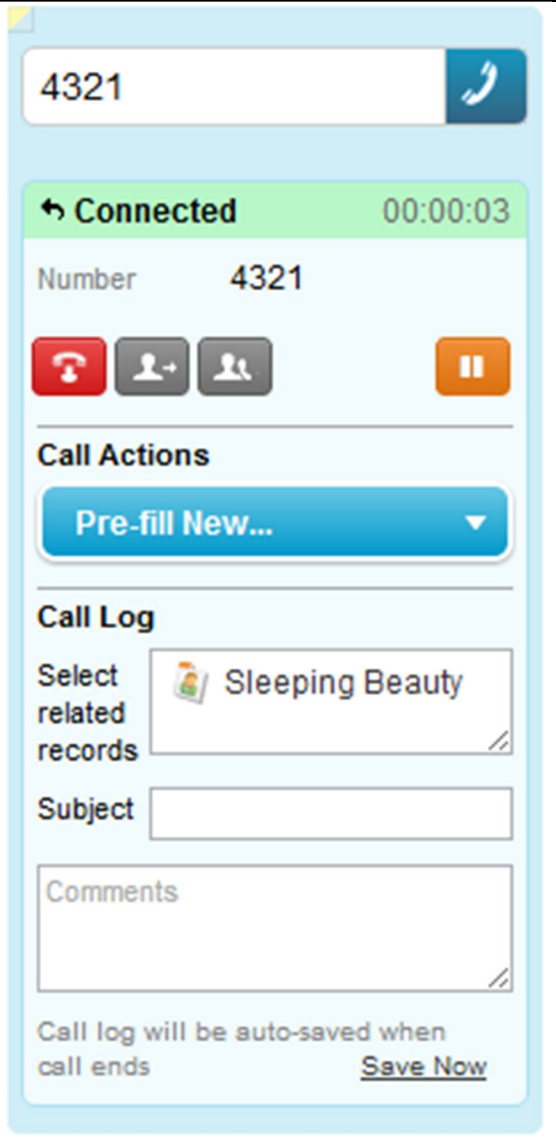


InGenius Connector Enterprise Description

A telephony window becomes available in the Salesforce.com when ICE is installed. The telephony window provides quick access to all telephony features as well as advanced call logging features.

InGenius Connector Enterprise is easy to use and each employee within an organization who uses Salesforce can be licensed for operation of ICE. The ICE software integrates cleanly and easily within Salesforce and requires no desktop install. It provides full control of the user's desktop phone, and integrates with Salesforce to make names and phone numbers clickable. The ICE software will also cause screen-pops to occur on incoming calls.

User Interface Overview

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|  | <p>During a call, the call log and telephone features are easily accessible in the softphone area in Salesforce.</p> <p>This view allows you to see the caller name, caller ID and phone number of the person you called.</p> <p>The softphone controls enable you to end the call, transfer the call, start a conference call, place the call on hold or retrieve a call from hold.</p> <p>The comment area allows you to add notes about the call while the call is in progress and automatically save those notes to the correct Salesforce.com record at the end of the call.</p> |
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| <p>The screenshot shows a mobile application interface for a call log. At the top, there is a search bar labeled 'Line 1' with the text 'Name or number' and a call icon. Below this, it indicates 'In Conference' with a duration of '00:00:56' and a '2' in a blue box. The interface lists two participants:</p> <ul style="list-style-type: none"> Participant 1: Dialed # 0652, Number 6135919002, Name H.Kalosha. A yellow highlight is under the text 'This call was transferred by' with the number 5008 below it. Participant 2: Number 6007, Name Sleeping Beauty. <p>Below the participants are icons for call actions: a red phone icon, a green grid icon, a grey person icon, and an orange pause icon. A 'Call Actions' section contains a dropdown menu labeled 'Pre-fill New...'. The 'Call Log' section has a 'Select related records' list with items: 'Sleeping Beauty', 'Jessy Cisco', 'Paperless Org. Sup', and '00001003'. The 'Subject' field contains 'Call 8/20/2012 12:38 PM'. At the bottom, there is a text box with 'H.Kalosha 6135919002 0652' and a note: 'Call log will be auto-saved when call ends' with a 'Save Now' link.</p> | <p>Multiple call log templates can be configured – per user, or shared across the company.</p> <p>Complex call scenarios are supported.</p> <p>The image here shows a two-party conference call in progress.</p> |
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Technical Overview

| Feature | Description |
|----------------------------|--|
| No Desktop Install | ICE is installed on a server, and connects to your phone system, and Salesforce.com at the server level. Once installed, ICE is easily rolled out to all your users, whether they are using Macs or PCs. |
| Easy to Maintain | The ICE product can be upgraded without visiting desktops. Upgrade the server, and all employees are updated immediately. |
| Supports Multiple Switches | Integration with popular phone systems: <ul style="list-style-type: none"> • Cisco Call manager • Cisco UCCE • Mitel 3300 MCP • Avaya (coming soon) |
| Uses Latest Technology | ICE is built using the latest release of the Salesforce.com CTI software, OpenCTI. |
| Easy to Integrate | Integration with Salesforce is achieved using an Apex Package and Salesforce call center. User are added to the Salesforce call center to enable access to the ICE functionality. |
| Multiple Browser Support | IE, Firefox, Mozilla, Chrome |
| Multiple Platform Support | Works on Windows, OS X, and Linux desktops. |



Operational Overview

| Feature | Description |
|---------------------------|---|
| Integrated User Interface | Small, easy to use, application within Salesforce screen - user does not leave Salesforce |
| Handles Outbound Call | Click-to-dial to make calls from within Salesforce records |
| Handles Inbound Calls | Screen-pops based on incoming Caller ID Number |
| Automated Call Logging | Logging of all calls, with duration, subject, details, notes and other elements directly into Salesforce records. User can associate call with multiple items within Salesforce such as cases, accounts, contacts or opportunities. |
| Caller ID Preservation | When an inbound call is transferred from another agent or user the Caller ID of the original inbound caller is maintained and transferred to the new user. This way the Caller ID of the original caller is not lost and data will be automatically logged against the correct record. |
| Full Call Controls | User can answer, hang up, hold, retrieve, transfer, and conference and perform consult calls all from within the window. Design also enables users to easily handle multiple lines and calls simultaneously. |
| Integrated Search | <p>Powerful search feature allows user to look up numbers by simply typing a few characters of the name or number. This features performs a live search within salesforce.com as name/number is entered.</p> <p>The search facility is designed to ensure users can easily handle multiple matches, and find the correct record to associate with a call.</p> |

| Feature | Description |
|------------------------|---|
| Process Streamlining | Key processes can be easily streamlined by creating new records, like leads, contacts, accounts or cases with prefilled data from incoming calls. |
| Call Log History | On-screen log of calls made and received. User can click on any previously made call to re-dial. |
| Customizable Interface | <p>The following items can be configured within the interface:</p> <ul style="list-style-type: none"> • Speed-dial buttons • Speed transfer buttons • Call disposition templates • Call wrap-up codes <p>These items can be created per user or per organization to support common workflows.</p> <p>For inbound calls the screen-pop can be set to initiate on ring or on call answer.</p> <p>The user can also hide buttons and change the color scheme or representation of the buttons.</p> |
| Call Center Support | When advanced call center features are enabled then agents can log into and out of queues and set status. Additional data such as DNIS or Account can be displayed along with other information obtained from a data-dip associated with the call. |

Is ICE for Call Center workers only?

Absolutely not! Every employee in a company that uses the CRM can use InGenius Connector Enterprise. One of the most striking features of ICE is its ease of deployment in larger organizations. Since ICE does not require any desktop install, it can be rolled out throughout an organization by simply adding users to a Salesforce.com Call Center.

Call Center Agent Features

The advanced features of ICE that support call center agents add key user functionality such as logging into the system and setting agent status.

To use the example of a Cisco phone switch, if users are connected directly to a Cisco Call Manager phone switch, they can use all the features of ICE and need not be concerned about agent queues, logging in or setting agent status. If users are connected to Cisco Unified Call Center Enterprise (UCCE) or Cisco Unified Call Center Express (UCCX), then the advanced call center support features of ICE will easily support their business process and workflow.

Agents can log in (generally using their ID, extension, and password), and can set their agent state at any time. The available agent states are dictated by the call center software that is in use, and ICE can be customized to use the same agent states.

Agents will also like the speed dial and quick transfer/conference buttons in ICE. These features make it extremely simple to conference in a supervisor

What does ICE NOT do?

We've said a lot about what ICE is – but what does it NOT do?

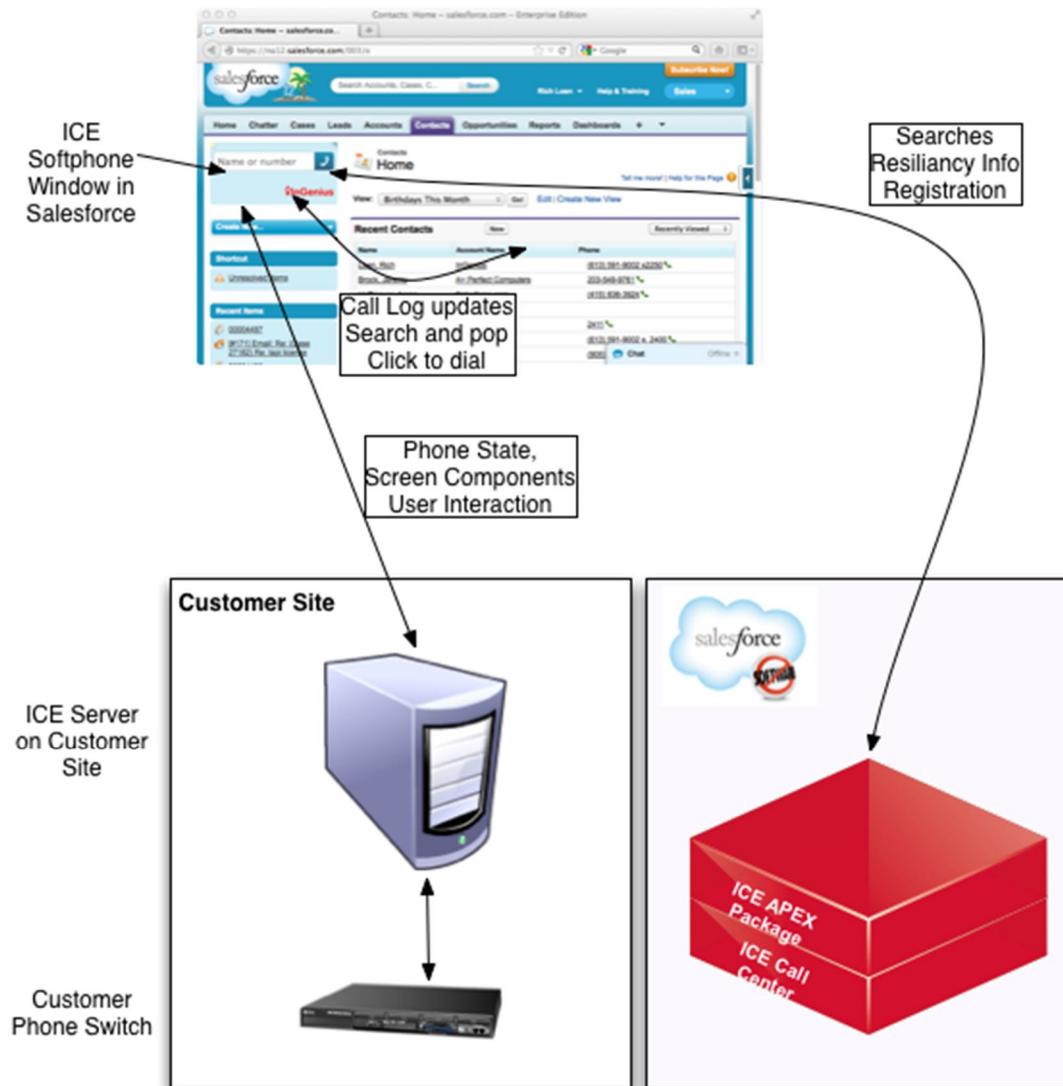
- ICE is NOT a phone system. It works with your existing phone installation.
- ICE is NOT a call center. For example, ICE will work with Cisco Call Manager or with Cisco UCCE, but it doesn't add any call center features.
- ICE is not a Call Recording solution. However ICE is designed to integrate with the most popular call recording solutions.

Basically, ICE lets you keep your existing telephony infrastructure, but integrate it quickly and cleanly with Salesforce. We do this better than anybody.

Application Architecture

InGenius Connector Enterprise is a server product that you install on-site at your location. It connects to your phone system, and then, through a simple integration with Salesforce.com or Microsoft CRM, a powerful telephony window is available in the CRM user's browser window.

The application runs on a standard Windows 2003 or 2008 server. We recommend only running our application on the server. ICE works fine on virtualized servers and can be installed in a redundant configuration. The browser portion of the ICE application will automatically detect which ICE server to connect to.



What gets installed?

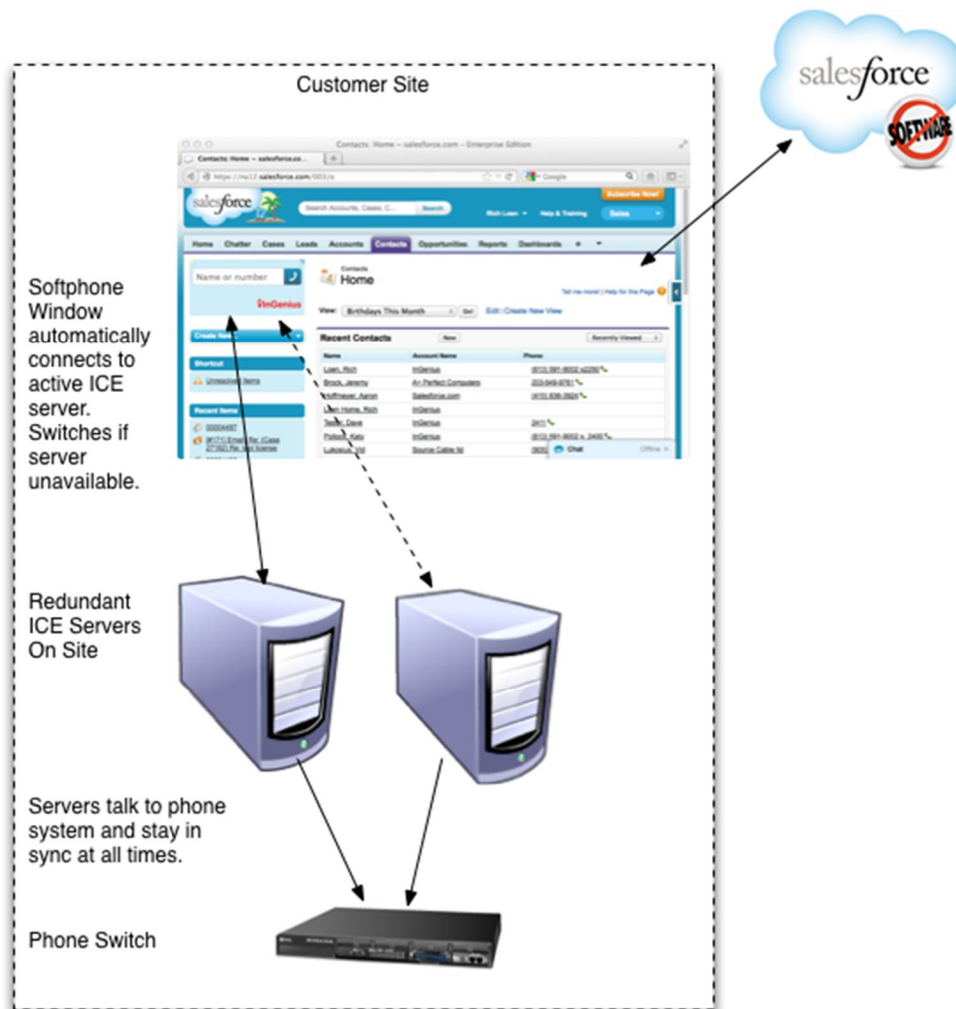
In a typical installation, a small server application is installed on site on a Windows 2003 or 2008 server.

A Salesforce managed Package is installed within the Salesforce.com instance.

Resiliency

The InGenius Connector Enterprise application can be installed in a resilient configuration. Two ICE servers can be configured. Each server talks to the phone system, and stays in sync at all times.

When a user logs in using the browser, the software tries one, then the other server until it can connect.



Deeper integration with existing systems in a company

We designed ICE to be easily integrated within a company's existing infrastructure. We support a "data-dip" functionality, whereby incoming calls can trigger a query within the CRM system, to pull up any extra information about a call. All the call parameters are passed into the data-dip function (which can be modified by the salesforce.com administrator), and it can return any extra parameters desired. These extra parameters are displayed to the Agent in the telephony window. They can also be used to help direct calls – for example, to choose an appropriate call queue based on a customer's previous interactions, or billing status.

Many other integrations of this nature are available as ICE is easily extendible to suite your needs and optimize automation for your specific workflows.

Telephone System Support

Initially ICE will support the Cisco Call Manager and support for Avaya phone systems in progress now. Other integrations are in the works and details of these will be released in the near future.

ICE supports:

- Cisco Call Manager
- Mitel (coming very soon)
- Avaya (coming very soon)

ICE and Salesforce.com

What gets installed in my Salesforce.com instance?

InGenius provides a managed package that gets installed in your Salesforce.com instance. This package is extremely small, and modifies no Salesforce.com tables or data.

InGenius also provides a Call Center file, which is an XML file that defines how the telephony interactions in Salesforce.com function. Your administrator needs to import this file, then add users to the Salesforce.com Call Center.

What is a Salesforce.com call center?

A Salesforce.com call center is a configuration item within Salesforce.com that determines which users are allowed access to telephony functionality.

As part of the ICE installation, a Call Center XML file is provided. This file must be imported into your Salesforce.com instance, and then it needs to be configured. This is a simple procedure within Salesforce.com.

Finally, your administrator will need to add users to the Call Center. There are tools within Salesforce.com to allow users to be added.

Will ICE work with a customized version of Salesforce.com?

Yes, ICE will work with most customizations.

Pricing and Licensing

The licensing model for InGenius Connector Enterprise matches the Salesforce licensing model and is purchased per user. Billing is typically done on an annual basis. To talk to a salesperson and learn more about InGenius Connector Enterprise or to purchase the products please email sales@ingenius.com.

Definitions

| Term | Definition |
|-------------------------------|---|
| CTI | Computer Telephony Integration |
| Data DIP | Pulling additional data such as account numbers to attach and display with inbound calls. |
| ICE | InGenius Connector Enterprise |
| Call Center Agent | User working in a customer call center that would typically login to call center queues. |
| Cisco Call Manager | A software-based call-processing component of the Cisco IP telephony solution. The software extends enterprise telephony features and functions to packet telephony network devices such as IP phones, media processing devices and voice-over-IP (VoIP) gateways |
| Salesforce Call Center | Enables users to access computer-telephony applications that have been integrated with Salesforce. |
| Salesforce Package | Salesforce Apex package that enables connection between ICE and Salesforce |
| Salesforce Softphone | A customizable call control tool that is integrated into the Salesforce application. |
| TAPI | Telephony Application Programming Interface |
| TSAPI | Telephony Server Application Programming Interface |
| UCCX | Cisco Unified Contact Center Express |
| UCCE | Cisco Unified Contact Center Enterprise |