



Specifying Web Integration Settings

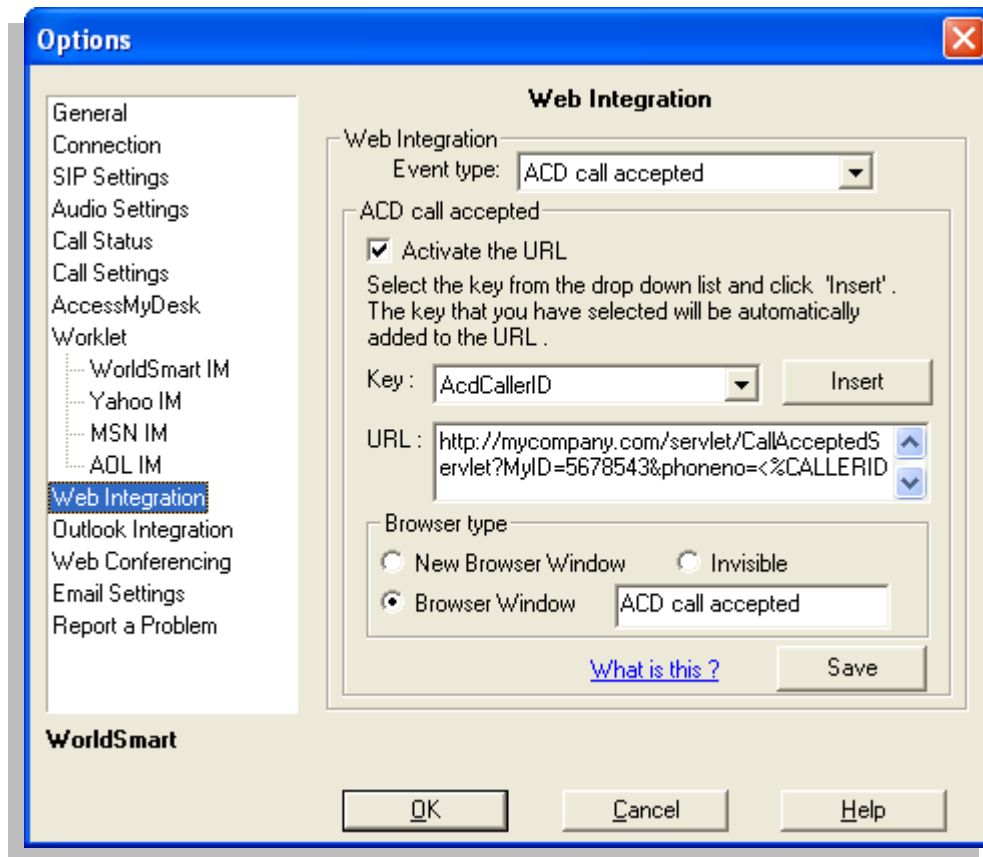
The WorldSmart Web Integration feature, embedded in the Messenger makes it convenient for the Account Administrator to keep track of all information relating to call activities, logging in and out of the messenger, and phone status in real time in a third party database.

Web Integration provides a simple event trigger mechanism using http protocol and events like WorldSmart login, phone call received or hang-up and so on. This mechanism generates actions like opening a browser with a specific search URL or sending a message to an internal web server with parameters like Caller ID, user extension and so on.

This feature would be useful to any organization, which needs to track agent activity and generate its own reports; it would also be useful to log call information into a third party CRM tool.

This document explains the way this feature works and how it can be implemented.

The Web Integration feature can be accessed and configured from the WorldSmart Options window shown below:



The WorldSmart Messenger identifies events such as login, logout, incoming call ringing, incoming call accepted, incoming call ended, and so on. Information about these events—Keys—as specified by the user (for instance, time of the call—when it was ringing, accepted, ended—the caller ID of the caller, extension of the user who accepted the call) is instantly sent by the WorldSmart Messenger to the location (URL) specified by the user.

Thus, the core concepts on which the feature is based are:

- Event
- Key
- URL

A detailed explanation of these concepts is given below:



Event

The WorldSmart Messenger and the WorldSmart SmartPhone are able to identify various events that relate to call activity on the SmartPhone, as well as login and logout details for a user. These events have been identified based on the type of information an Account Administrator needs to collect about activity in the account. For instance, an Account Administrator would find it useful to have information such as what time users log in and log out, what calls they receive, from which numbers, and so on. Since these events are reported in real time, the Account Administrator can also actually use this information on a minute to minute basis.

On this “need to know” basis, the following events have been identified:

1. Inbound call accepted
2. Inbound call hang-up
3. Inbound call missed
4. Inbound call received
5. Inbound call transfer
6. Outbound call connected
7. Outbound call hang-up
8. Outbound call transfer
9. WorldSmart login
10. WorldSmart logout
11. WorldSmart phone status
12. ACD call accepted
13. ACD call hang-up
14. ACD call missed
15. ACD call received



Key

Using the Keys available on the Web Integration Preferences screen, users can determine the information that should be sent out about each event. Each key is inserted as a script into the URL. This script gets replaced with its actual value when an event report is generated and sent out.

For instance, if you select the key "WorldSmart User," the script "<%USERID%>" gets added to the URL. Every time an event report is generated thereafter, this script will be replaced by the user's WorldSmart ID.

Following Keys are available from the drop down menu:

1. Caller ID
2. Softphone DND Status
3. System Time
4. Transfer ID
5. WorldSmart Extension
6. WorldSmart User
7. DID
8. Queue name
9. Queue wait time

Example: Here is an example of how an event can be associated with Keys:

Event: WorldSmart login

Keys: WorldSmart User, WorldSmart Extension, and System Time.

Thus, when a user logs into the WorldSmart Messenger specified information about the event (their User ID and extension as well as the time of the login) is instantly sent to the URL specified.

When all users in the account set up triggers for the event "WorldSmart Login" with the configuration shown above, the Account Administrator has comprehensive information about login timings for the entire account.

Similar setups will allow the Administrator instant access to information regarding all incoming calls, all outbound calls and so on.



URL

The information configured using Event and Key is sent to the URL specified. Such a URL would probably point to a location on the organization's own network, or perhaps to a third party CRM tool. An organization will need to make the appropriate choice, and have the necessary infrastructure to successfully use this feature.

For example, let us say the location where information reaches is <http://www.newaccount.com/servlet>. This is the basic location for the information. To this basic URL, keys as specified are added. If the event is WorldSmart Logout, and if the Keys to be included in the URL are User ID, Time, and User Extension, the URL in the end could look something like this:

```
http://www.newaccount.com/servlet/WSLogoutServlet?MyID= <%USERID%> &MyTime= <%SYSTIME%>
&MyExtension= <%USEREXT%>
```

Note: The Actual Keys inserted in the URL above are in bold for convenience of viewing.

Browser window

Each event can also display the information being sent out on the users' desktop. This acts as a sort of preview: users can see what information is going out with each event, and modify the set up as necessary.

This preview can be viewed in two different ways:

- **New Browser Window:** This opens a new browser window with the above entered URL every time an event occurs, and is helpful if you want to display any search information in the browser.
- **Browser Window:** A browser window is reserved for this event and every time an event occurs, the same browser window will be used to load the URL.

Another option is to disable this preview:

- **Invisible:** No browser window will be opened but the URL will be invoked in the background.

Note: Web Integration settings are stored locally on a user's PC. Thus, someone using a different system than the usual one may need to re-do their Web Integration Settings.



Using web integration with Salesforce:

Please follow Salesforce integration instructions in the following manual:

<https://central.wspbx.com/docs/pdfs/SalesforceIntegration.pdf>

To enable record search and task creation per incoming call with Salesforce the following Links and tokens are to be used:

Record search:

http://na2.salesforce.com/search/SearchResults?searchType=1&sen=003&setLast=1&sbs_tr=<%CALLERID%>%&search=+Go%21+

Task Creation:

http://na3.salesforce.com/00T/e?title=Call&followup=1&tsk5=Call&tsk6=Call%20From:%20<%CALLERID%>&tsk6_fu=Related To Call From:%20<%CALLERID%>%20on:%20<%SYSTIME%>