Overview

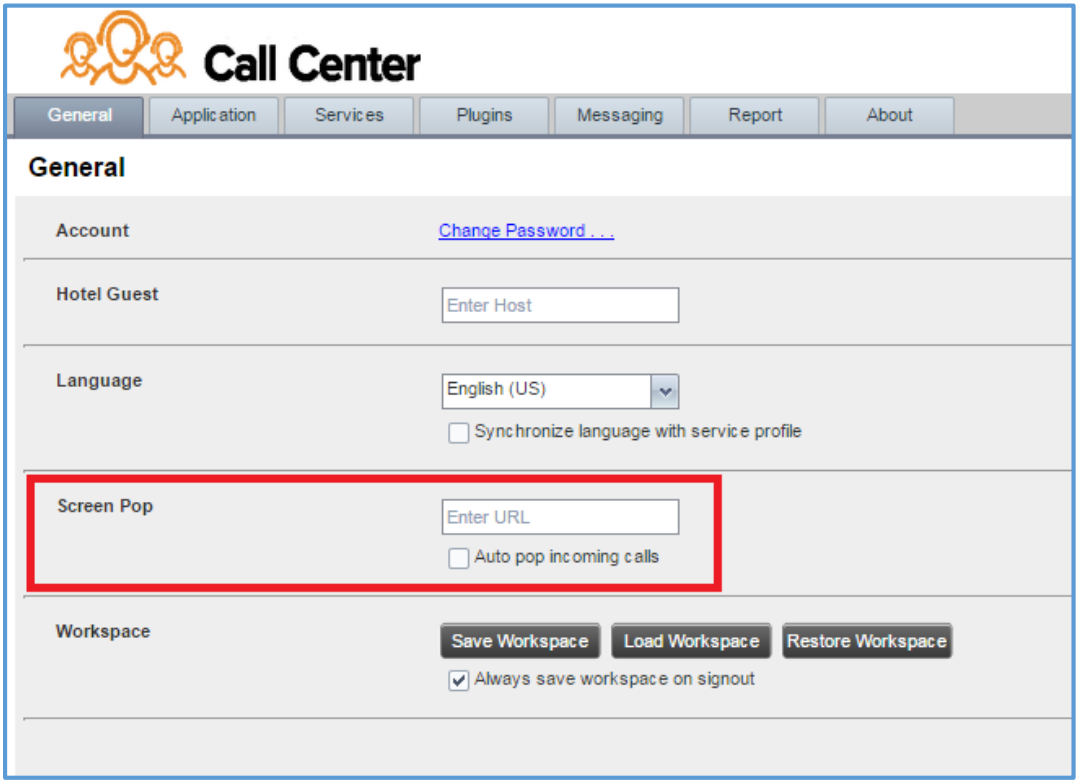
One of the common functions in a call center is to provide a “screen pop” to an agent that contains information about the incoming call. Customers typically house “customer” information in commercial or proprietary CRM application. To enhance the customer experience and agent efficiency, this “screen pop” can provide the agent key information about the customer, their status with the organization, and a history of their interactions or transactions.

Evolve IP’s call center client applications provide native “screen pop” support that can be easily configured to integrate with any business application. When the agent receives an inbound call, the call center application can launch the customer’s business application and provide information about that caller. This empowers the agent with up to date information about an existing caller directly inside the business application they use on a daily basis.

This document provides the details required for an Administrator to enable a “screen pop” in both of Evolve IP’s call center client applications.

BroadWorks Call Center Agent and Supervisor

In the application’s General Settings, an agent can be configured to launch a screen pop when receiving an incoming call.



The Settings are as follows:

Screen Pop URL – This text box allows you to enter the URL address of the web page that application will open using the default browser when the agent clicks the Web Pop URL button in the Call Notification pop-up window.

Auto pop for incoming calls – When this option is checked, the application will automatically launch the Web Pop URL without the agent clicking on the Web Pop URL button in the Call Notification pop-up window for each incoming call.

The URL can point to any URL address, but typically points to a web application that parses optional call parameters and passes them to a Customer Relationship Management (CRM) application or other database.

For example:

http://www.myCRM.com/newcall?
USER=__PHONE__&REMOTEPARTY=__REMOTE_PHONE__&DNIS=__DNIS_PHONE__

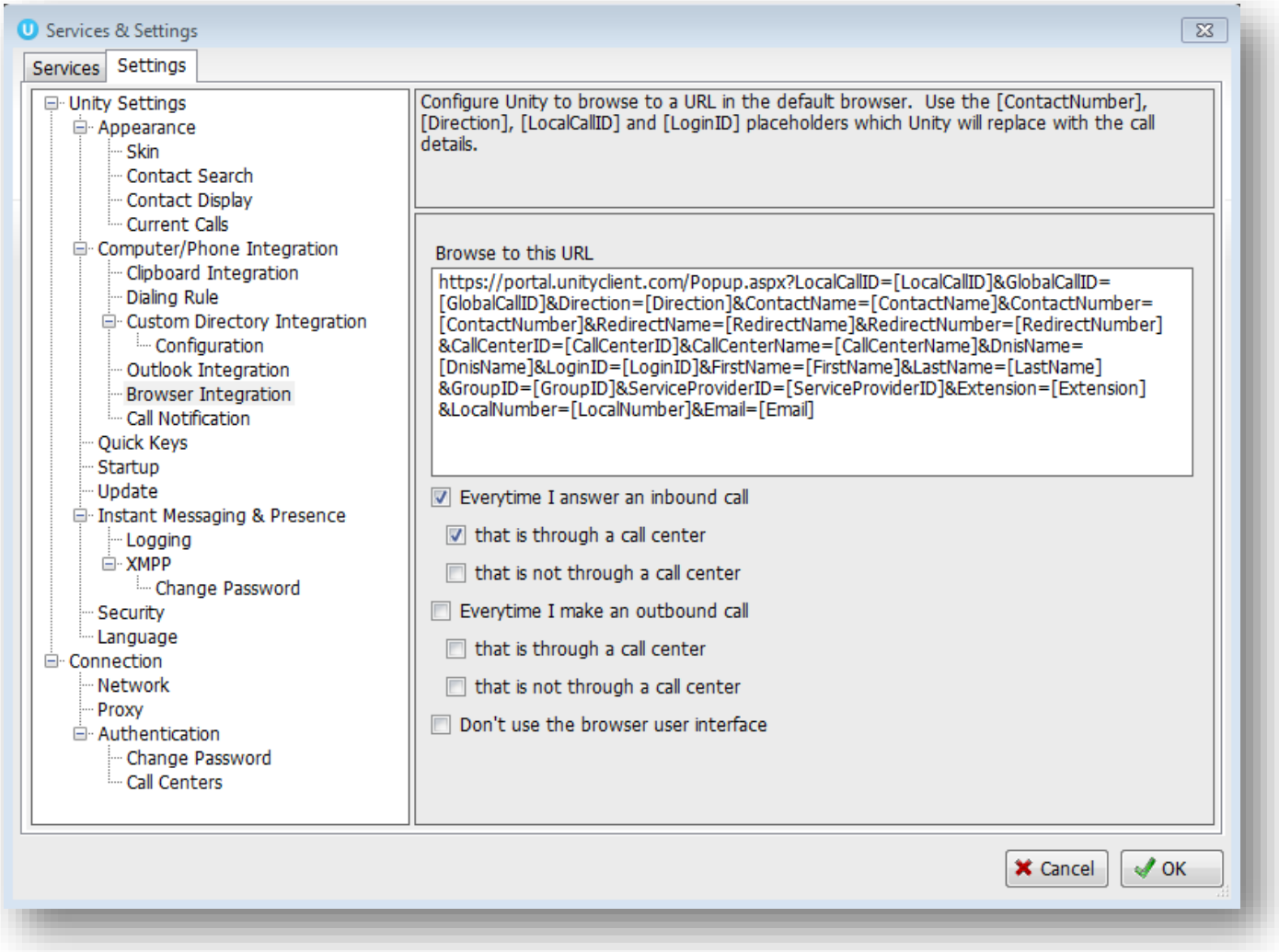
This URL passes the internal user's phone number, the remote party's phone number, and the phone number dialed (for inbound calls) to the application at www.myCRM.com.

There are a number of parameters that the client can pass to the browser. The following parameters are available:

Field	Description
__USER__	The phone system ID of the user
__FIRST__	The first name of the user
__LAST__	The last name of the user
__EMAIL__	The e-mail address of the user
__GROUP__	The name of the location to which the user belongs
__PHONE__	The phone number of the user
__REMOTE_PHONE__	The phone number of the remote party
__REMOTE_NAME__	The name of the remote party (when available)
__CALL_TYPE__	"Incoming", "Outgoing", or "Alerting"
__DNIS_NAME__	The name of the DNIS on which the call was received
__DNIS_PHONE__	The phone number of the DNIS on which the call was received
__REDIRECTED_NAME_1__ __REDIRECTED_NAME_2__	The name of a party to whom the call was redirected prior to being delivered to the current agent, from the most recent to the least recent
__REDIRECTED_PHONE_1__ __REDIRECTED_PHONE_2__	The phone number of a party to whom the call was redirected prior to being delivered to the current agent, from the most recent to the least recent
__REDIRECTED_USERID_1__ __REDIRECTED_USERID_2__	The user ID of a party to whom the call was redirected prior to being delivered to the current agent, from the most recent to the least recent

Unity Call Center Agent

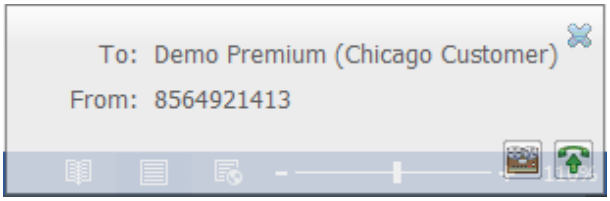
In the application's Browser Integration Settings, an agent's desktop can be configured to launch a screen pop when receiving an incoming call.



In **Browse to this URL** field enter the URL address of the web page that application will open using the default browser.

The URL can point to any URL address, but typically points to a web application that parses optional call parameters and passes them to a Customer Relationship Management (CRM) application or other database.

When the user clicks on the call notification pop-up window,



Unity will replace the parameters with the appropriate value or blank value if not available/applicable and launch the default browser. For example, the following URL passes the internal user's phone number, the remote party's phone number, and the direction of the call to the application at www.myCRM.com.

Entering the following URL:

http://www.myCRM.com/newcall?USER=[LocalNumber]&REMOTEPARTY=[ContactNumber]&DIRECTION=[Direction]

would be translated into the following (depending on the actual call scenario).

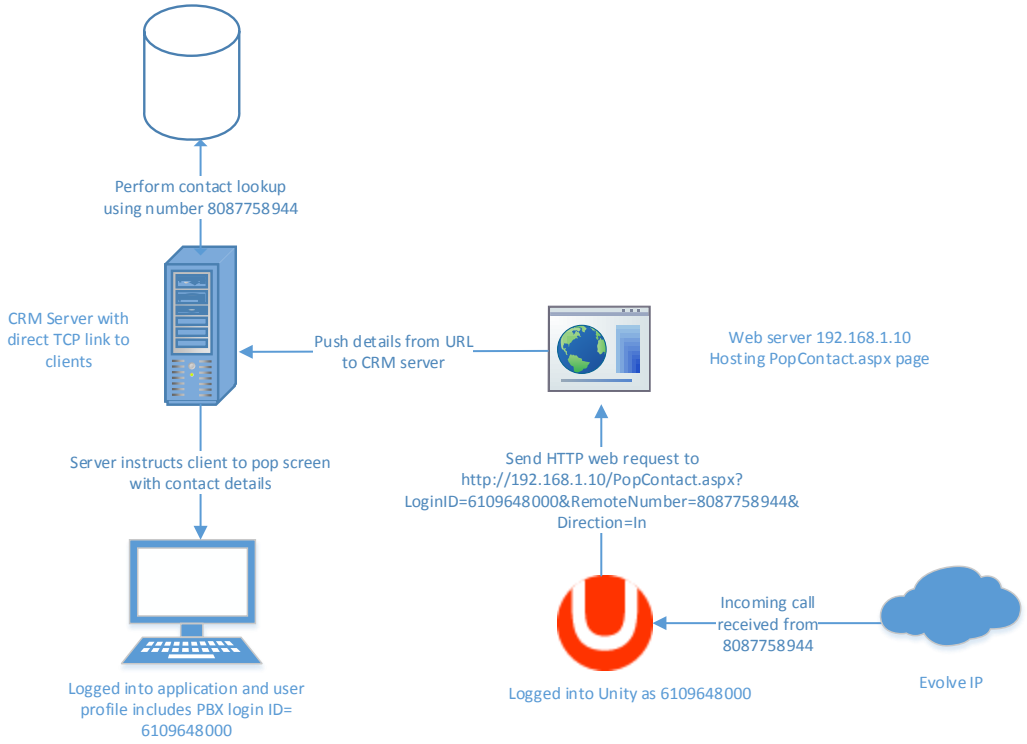
http://www.myCRM.com/newcall?USER=6105550123&REMOTEPARTY=6109648000&DIRECTION=in

There are a number of parameters that the client can pass to the browser. The following parameters are available:

Field	Description
[ContactNumber]	The number of the remote party (if available)
[ContactName]	The name of the remote party (if available)
[RedirectName]	The name of the hunt group/call center etc that the call came through. This will include the DNIS name if applicable.
[RedirectNumber]	The number of the hunt group/call center etc that the call came through
[Direction]	The direction of the call (In/Out)
[CallCenterID]	The ID of the call center that the call was routed through, otherwise blank
[CallCenterName]	The name of the call center that the call was routed through, otherwise blank. If provided this makes up part of the [RedirectName] delimiter
[DnisName]	The name of the call center DNIS that the call was routed through, otherwise blank. If provided this makes up part of the [RedirectName] delimiter
[GlobalCallID]	The global ID of the call. This doesn't change during transfer etc and is used for call logging.
[LocalCallID]	The local ID of the call. This does change when the call is transferred and is used to control the call (for example to release the call etc.
[LoginID]	The ID of the logged-in user
[FirstName]	The first name of the logged-in user
[LastName]	The last name of the logged-in user
[GroupID]	The group ID of the logged-in user
[Extension]	The extension of the logged-in user
[LocalNumber]	The phone number of the logged-in user (if assigned)
[Email]	The email address of the logged-in user (if entered in Broadworks)

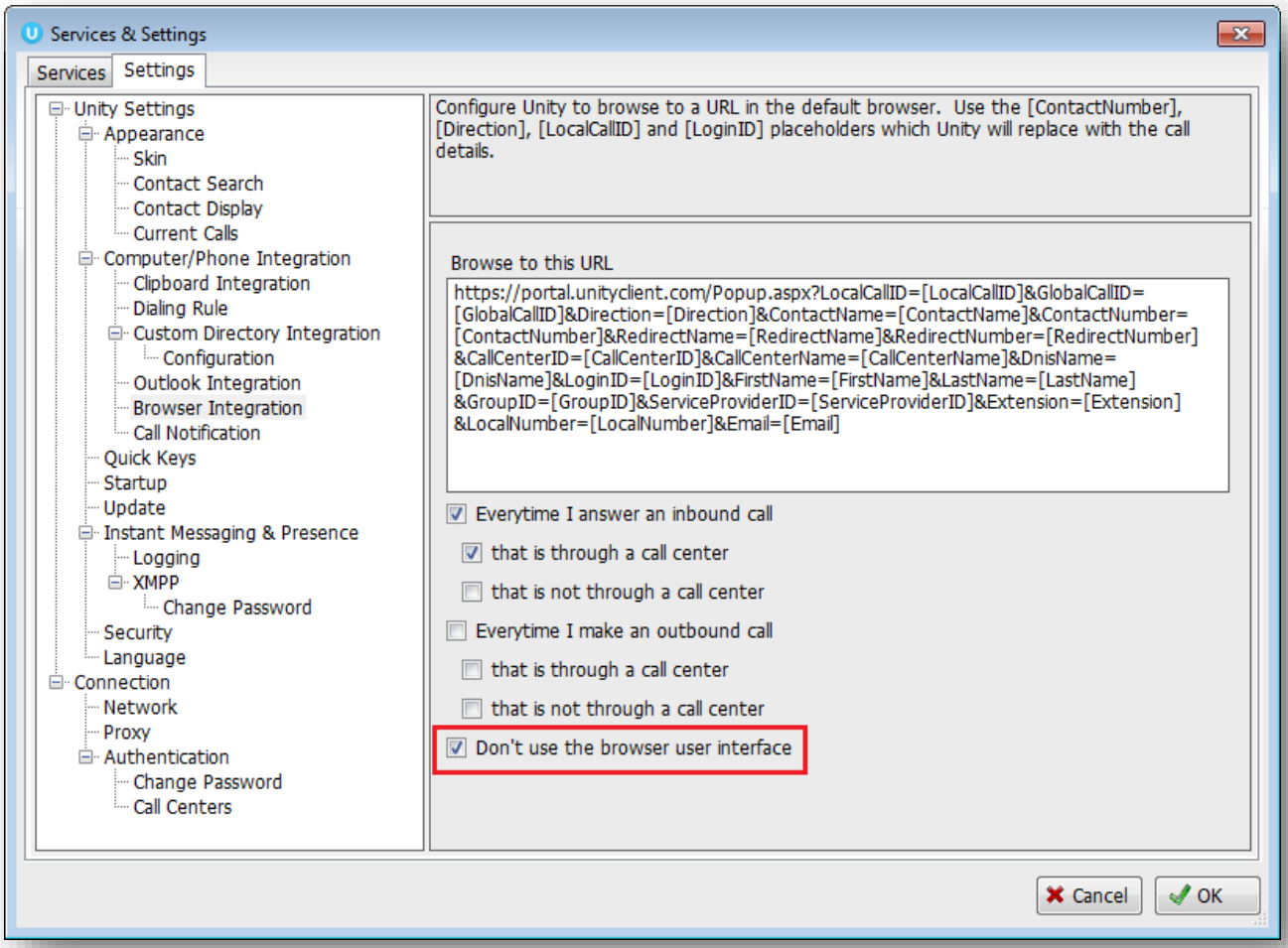
Launching a screen pop in a third-party desktop application

It is also possible to use Unity to send a URL without using the web browser, this is typically used in an environment where the third-party application being "popped" is desktop-based. In this case, Unity will send the URL as a web request through the client without using the browser. The web server will then process the URL and "push" the contact details to the user's screen, as illustrated in the diagram below



Although a web server is still often used to receive the URL from Unity, the contact screen is shown in a third-party application window rather than a browser. It is important to ensure the [LoginID] delimiter is used so the server pushes the contact details to the correct user's screen which may require mapping the PBX login ID of the user to the CRM login equivalent.

This is configured the same way as using a browser, except Unity is instructed to send the web request directly rather than using the default browser by activating **Don't use the browser user interface** as shown below.


Services & Settings
Services
Settings
Unity Settings
Appearance
Skin
Contact Search
Contact Display
Current Calls
Computer/Phone Integration
Clipboard Integration
Dialing Rule
Custom Directory Integration
Configuration
Outlook Integration
Browser Integration
Call Notification
Quick Keys
Startup
Update
Instant Messaging & Presence
Logging
XMPP
Change Password
Security
Language
Connection
Network
Proxy
Authentication
Change Password
Call Centers
Configure Unity to browse to a URL in the default browser. Use the [ContactNumber], [Direction], [LocalCallID] and [LoginID] placeholders which Unity will replace with the call details.
Browse to this URL
https://portal.unityclient.com/Popup.aspx?LocalCallID=[LocalCallID]&GlobalCallID=[GlobalCallID]&Direction=[Direction]&ContactName=[ContactName]&ContactNumber=[ContactNumber]&RedirectName=[RedirectName]&RedirectNumber=[RedirectNumber]&CallCenterID=[CallCenterID]&CallCenterName=[CallCenterName]&DnisName=[DnisName]&LoginID=[LoginID]&FirstName=[FirstName]&LastName=[LastName]&GroupID=[GroupID]&ServiceProviderID=[ServiceProviderID]&Extension=[Extension]&LocalNumber=[LocalNumber]&Email=[Email]
Everytime I answer an inbound call
that is through a call center
that is not through a call center
Everytime I make an outbound call
that is through a call center
that is not through a call center
Don't use the browser user interface
Cancel
OK