Salesforce Integration

Puzzel application is indigenously integrated into the Salesforce environment. Native integration allows you to bring Puzzel's capabilities into the CRM. While the agent is able to access a wealth of customer data stored within Salesforce, he can also use Puzzel's call, chat, email and dialler functionality to perform actions, driven by the data fetched from the CRM.

Puzzel has created a SSO into Salesforce that allow agents to seamlessly logon into Puzzel Agent Application if they have already logged on into Salesforce. With the help of the record viewer functionality, the agents can now view historic chat transcripts and listen to previous call recordings archived in the Puzzel application to gauge the customer mood and help them in the best possible way. It is a passive tool which simply permits you to access the archive after having authenticated into the Puzzel Application.

Any new lead or case registered within Salesforce can be assigned to the available agent by the Puzzel's routing engine. The triggers for this mechanism can be defined in the workflow of the Salesforce Logic Apps.

Refer to the following user guide articles:

- Salesforce User Guide

- Puzzel Agent Application SSO in Salesforce

- Salesforce Logic Apps

For more details, download the product sheet here:

Salesforce Partner
sheet.pdf