



Salesforce Integration

Use cases



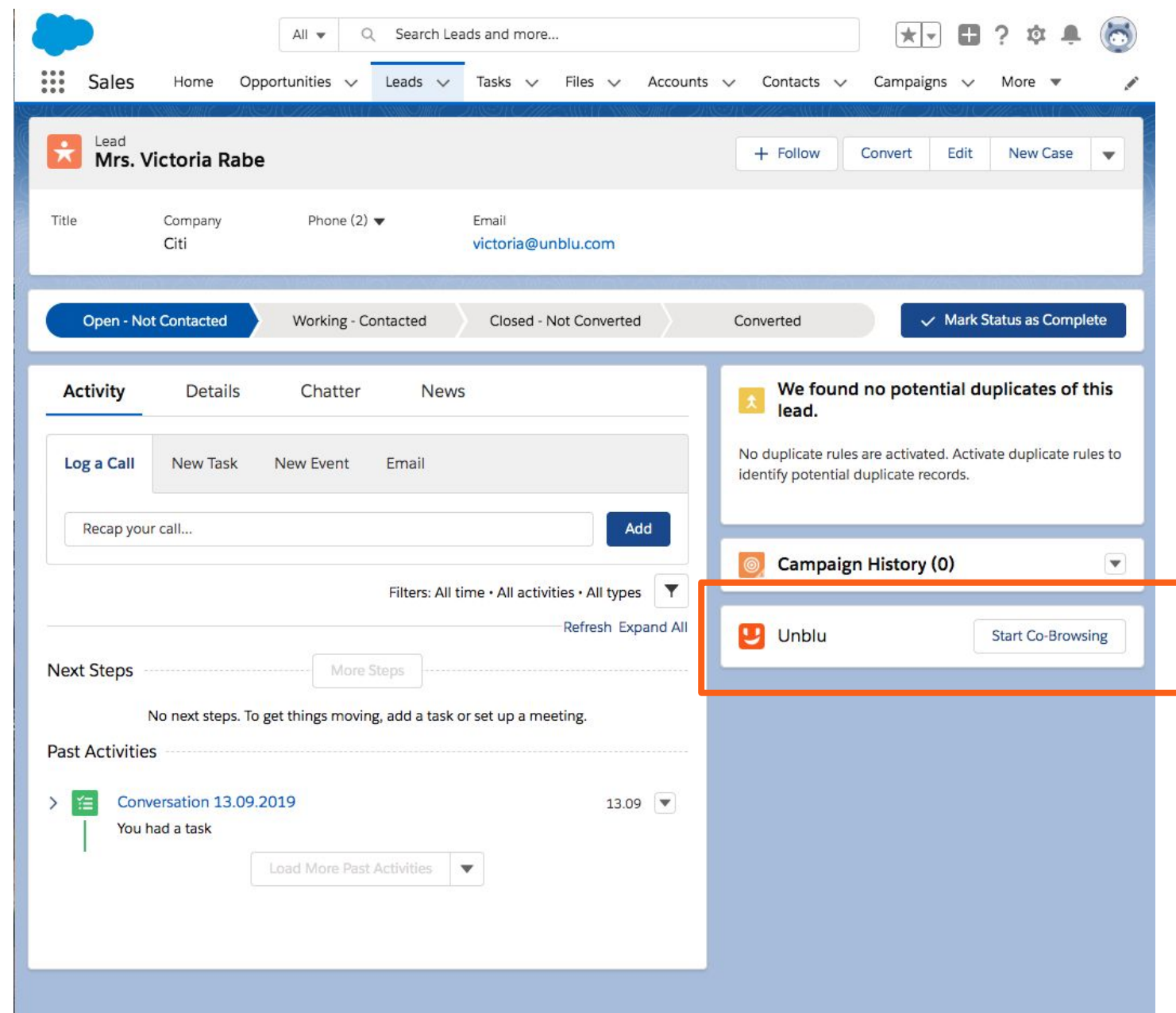
01



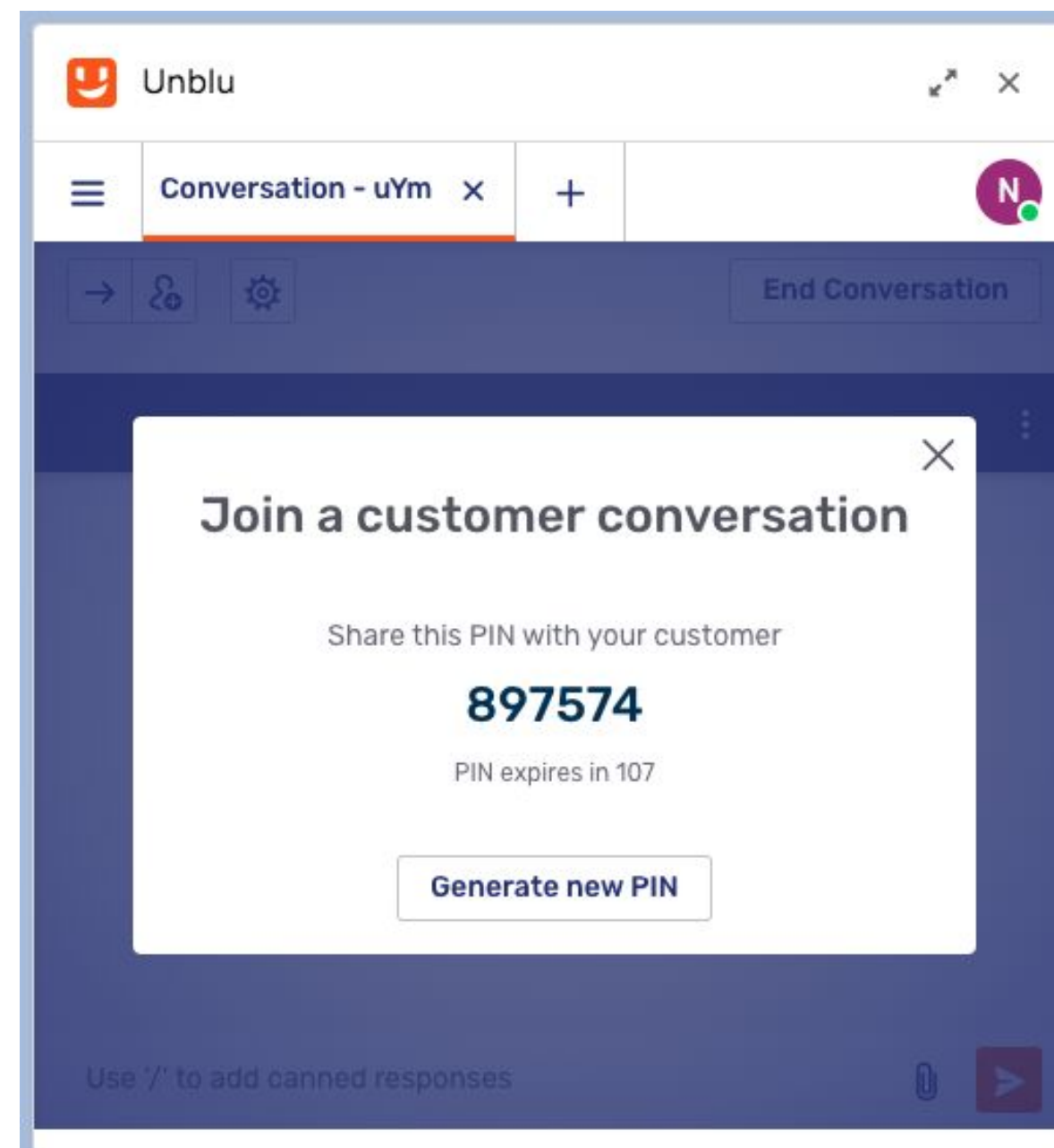
PIN Based Co-Browsing

Customer is on the website, e-banking, customer portal... and calls the call center. When the agent accesses the customer records they can offer a co-browsing session without leaving the CRM.

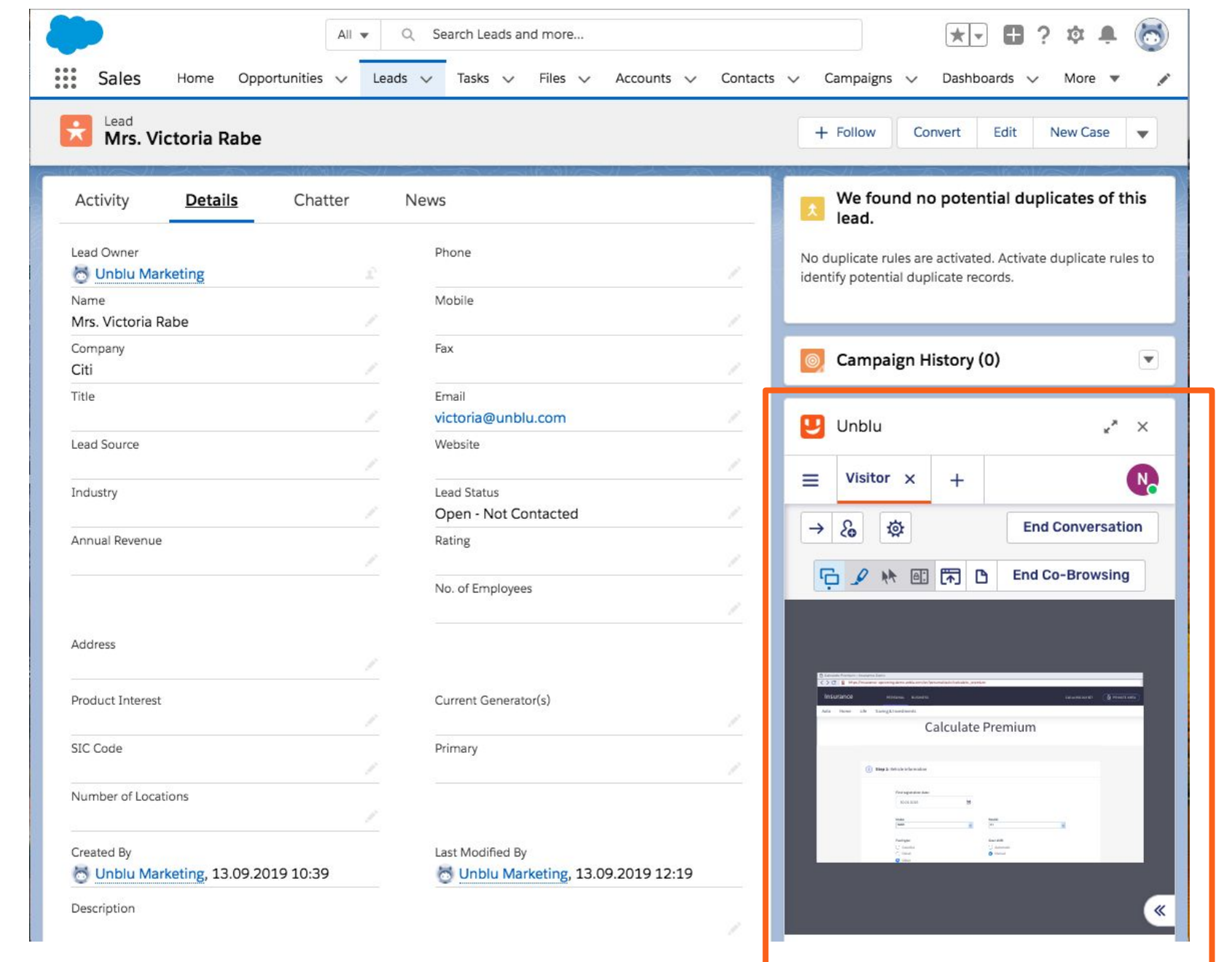
Step by step



Unblu plugin is available in every Contact.
You can decide where to place it.

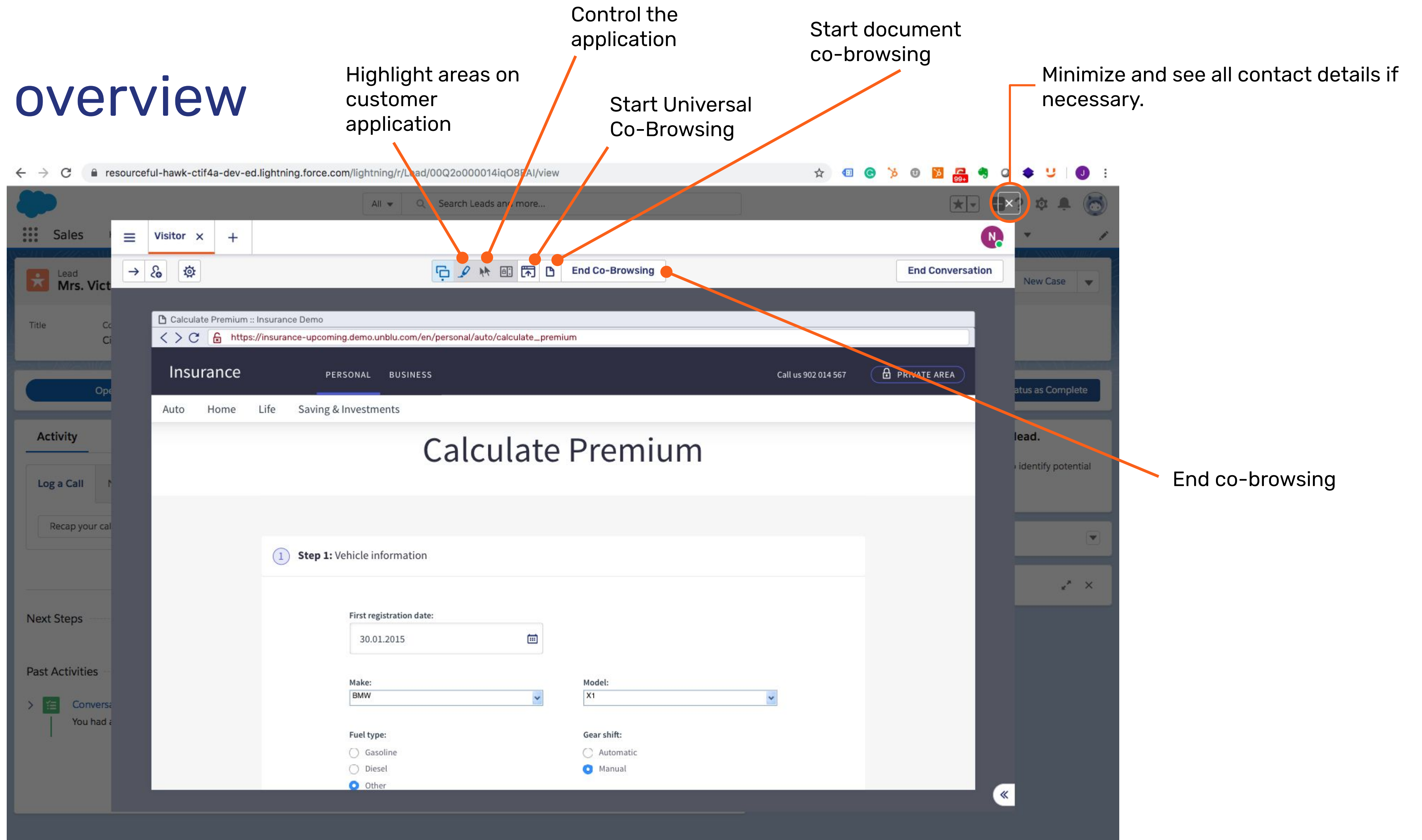


Click the button to generate a PIN and tell
the PIN to the Customer



Start the Co-Browsing sessions
(it start inside the plug-in but you can
expand it and make it bigger)

Controls overview



Expanded view

Controls overview

The image shows a screenshot of a web browser displaying a co-browsing session. The browser address bar shows the URL: resourceful-hawk-ctif4a-dev-ed.lightning.force.com/lightning/r/Lead/00Q2o000014iq08EA1/view. The page content includes a search bar, a 'Visitor' tab, and a 'Calculate Premium' form. The form has fields for 'First registration date' (30.01.2015), 'Make' (BMW), 'Model' (X1), 'Fuel type' (Other), and 'Gear shift' (Manual). A chat window is open on the right, showing a conversation with a PDF document titled '1609_WhitePaper_TakingThePain'. The chat window is in an 'Expanded view'.

Annotations with arrows pointing to specific controls:

- Highlight areas on customer application
- Control the application
- Start Universal Co-Browsing
- Start document co-browsing
- Minimize and see all contact details if necessary.
- End co-browsing
- Share documents, links or any other information in the middle of a conversation

Expanded view

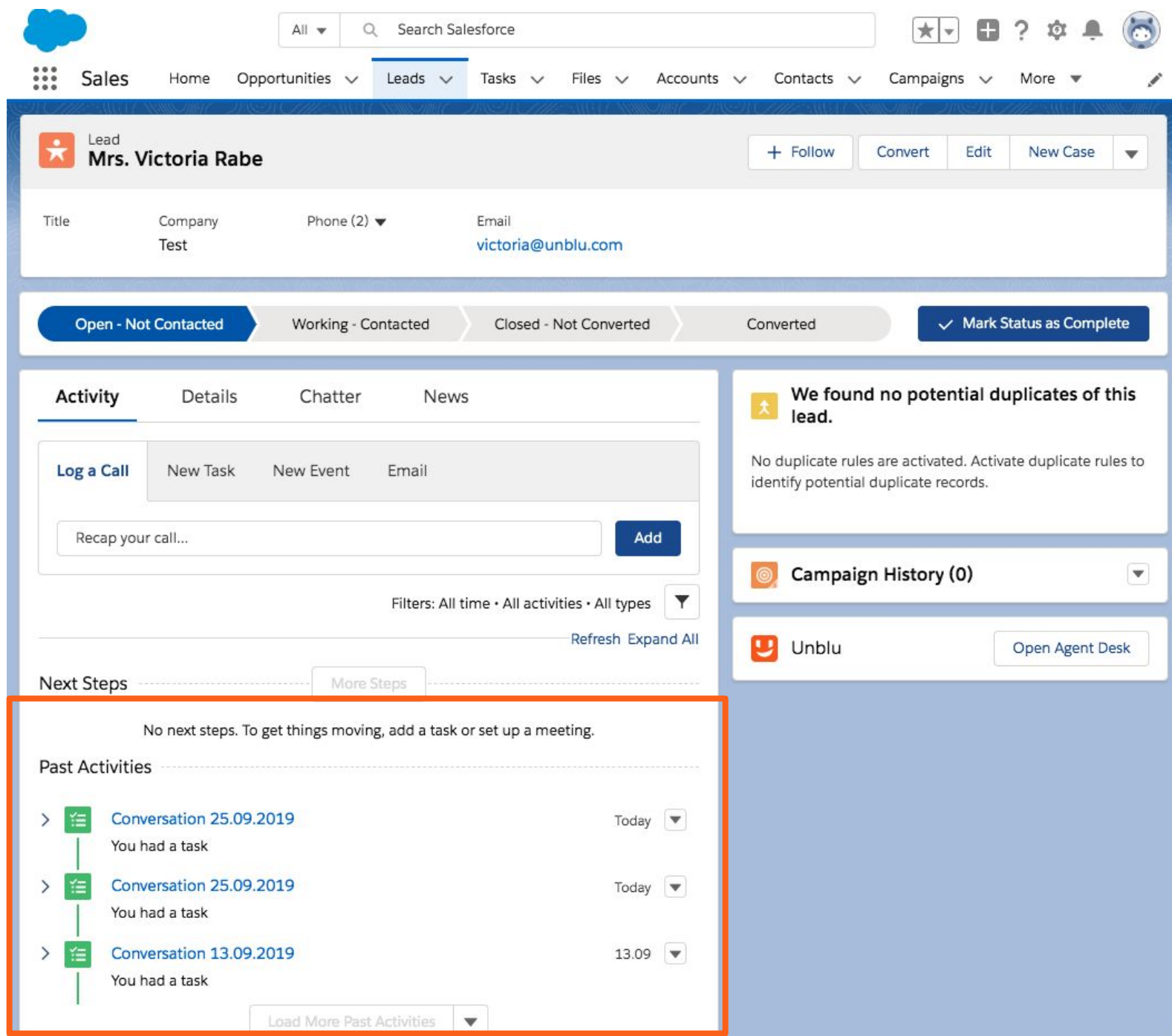
02



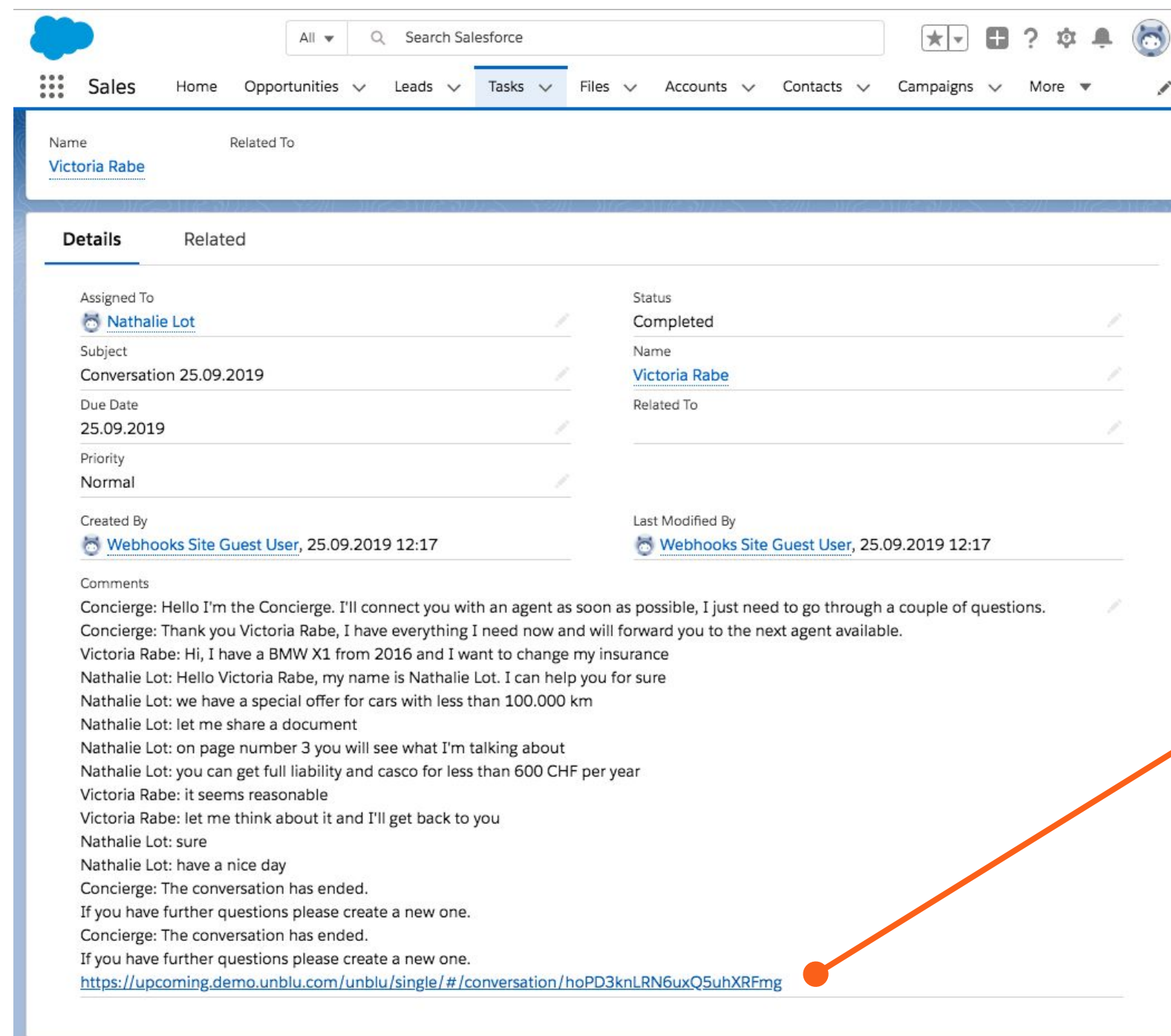
Chat conversation sync with existing customer

Existing contact starts a chat on any of the online assets where Unblu is installed. When the session is ended Unblu sends the log off of the conversation to Salesforce.

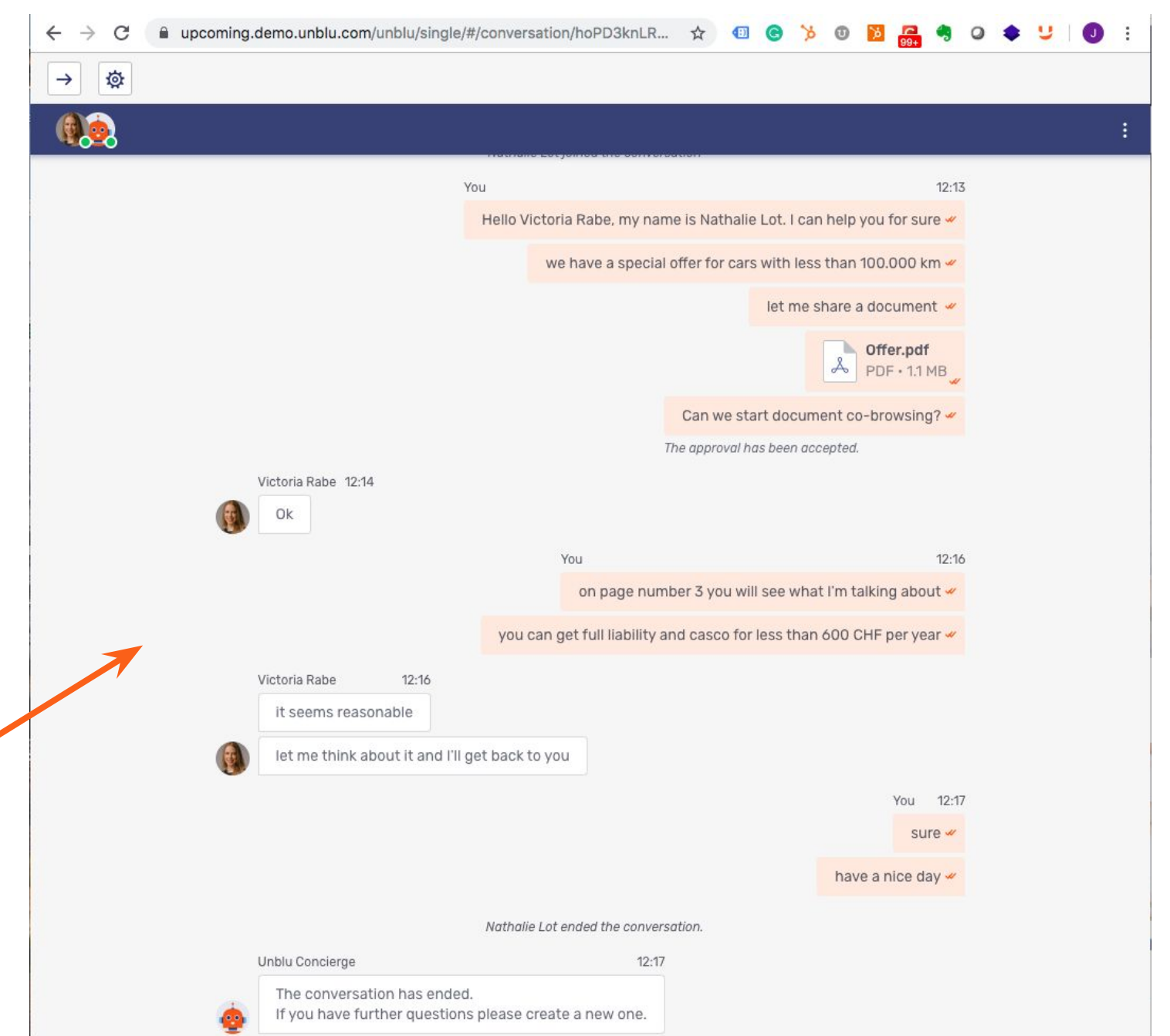
Step by step



Agent and customer chat on over the web. When the conversation is ended the log off is sent to Salesforce. It creates a new entry in the Activities timeline.



If you click in the activity you can see the log off of the conversation,



If you click in the link that appears at the end of the conversation you access the conversation in the Unblu server.

03



Chat conversation with new contact

Anonymous visitor starts a chat on any of the online assets where Unblu is installed. The concierge asks for the email and, if it doesn't exist in the CRM, a new contact is created. When the session is ended Unblu sends the log off of the conversation to Salesforce.