comitFS
communication solutions for financial markets

CAS-FOR-Salesforce

comitFS were engaged to deliver a full Computer Telephony Integration into a bank's Salesforce environment. Through this integration rich business analytics are now available to aid the Bank's salesforce users and its Customers.

A major financial institution required its global salesforce instance to capture comprehensive business analytics on calls made and received from its clients on its specialist dealerboard or regular telephones in any region. The simple user interface makes calls available as they appear on the device and can then be easily managed. The user experience was carefully considered throughout the project with regular meetings with our client to show progress.

The CAS Suite enables institutions to quickly integrate a number of user cases through its extensive API's.
The CAS server responds to requests and sends the details of the call, updating the user through their subscription when the call status changes. Teams and participants of a call are kept up to date in real time on who leaves and joins a call through the salesforce GUI. At the same time the CAS Suite populates the salesforce call reporting system allowing quick searches and client based reports to be generated.

VisualForce pages were created using the Call Centre features in salesforce and deployed globally with ease. CAS uses its profile feature to get the information of the user's telephony system per region. This feature allows the call history and call logs to be shown in the VisualForce page based on the history response received, which provided further enhanced trading insight.

comitFS was able to meet all of the requirements listed by the Client and provided professional services after the product was delivered. The services that were provided included custom communication development, unified communication and migration services.

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