Five9 | Performance Dashboard

INTEGRATIONS

FOR INTERNAL USE ONLY

Integrations can be simple or complex. Check phases 01 and 02 to see if what you're looking for will integrate with Five9 Performance Dashboard. Ultimately, we can make an integration work if it is properly scoped.

PHASE **01** Always the phone system: Five9

PHASE **02** To see if what you are looking for will integrate with Five9 Performance Dashboard, spot check the four rules below. If you're still not sure, reach out and start a Scope of Work (SOW).

Rule 01

CONNECTION:

How can we connect to it?

A. Rest API **B.** SFTP

* Data needs to be in json or .csv format

Rule 02

GOOD DOCUMENTATION:

If we don't have the documentation, we need to have a call with client IT and Clearview IT. If you need an example of good documentation, please ask your channel sales manager.

Rule 03

RAW LEVEL DATA (transaction):

It must be base data, not manipulated or calculated before we get it. ***Why?*** *We can't report useful and meaningful historical views if we are getting passed something that is already calculated. It's not dynamic at all.*

Rule 04

PRIMAY KEY:

We need the primary key to some sort of group inside of the organization. If you are trying to link data from System A to System B, you need some sort of matching field, like emails.

If you're not sure if it meets all of the base criteria, check with your Clearview channel sales manager to move into scoping. **Ultimately, we can make it work if it's properly scoped.**