CXone Performance Management

Salesforce Integration

Solution Description

This is an integration that pulls the data from Salesforce to be able to create the metrics outlined below in the CXone Performance Management (PM) system. This will allow you to view your requested Salesforce metrics in the same dashboards and wallboards as ACD metrics, as well as other systems that have been integrated within the CXone PM tool.

Description of Services

Deliverables:

1. Establish connection to Salesforce.
2. Build stored procedure and standard metrics from database
3. UAT (User Acceptance Testing)

Completion Milestones:

1. Salesforce credentialis provided to CXone PM
2. Pre-defined metrics built
3. Customer UAT (User Acceptance Testing)

Connection Guidelines:

1. Client to provide CXone (PM) with credentials to their production Salesforce environment. These credentials can be read-only access but must be authorized to access the objects that Client wants data pulled from, including meta-data objects such as Users, Groups, etc.

Reporting

1. Salesforce metrics are not updated in real-time.

Metric Guidelines

1. Only metrics listed below will be included, up to a limit of 10 base metrics
    - Additional metrics can be made available to customers at no additional charge in the case that the additional metrics are a subset of a base metric listed below.
2. Metrics will be assigned to the current hierarchy in client's environment as applicable. Client will need to provide how the hierarchy is to be mapped from Salesforce to their current hierarchy.
3. Any additional metrics required will be considered "custom"
    - Custom metrics will need to be scoped out by a database specialist
    - Custom metrics will require PS hours to be completed
    - Custom metrics will NOT begin until the standard integrations is completed and accepted by the customer

Customer Responsibilities

1. Identify internal Subject Matter Experts (SMEs) to participate in the implementation project, to include:
    - Project Manager to organize required Customer resources necessary to complete requirements definition, perform review of deliverables, and provide sign-off on project deliverables.
    - Contact Center Reporting SME to participate in requirements definition and conduct User Acceptance Testing
2. Develop User Acceptance Test plan and cases.
3. Develop test data for User Acceptance Testing.

4. Execute User Acceptance Test cases and provide to NIC written notification describing defects encountered during the UAT process.

5. Provide sign-off on the deliverables and milestones described in this SOW or written notification outlining any deficiencies within five (5) business days of receipt.   within five (5) business days of receipt.

CXone Performance Management Responsibilities

1. Assign named Professional Services resources to the implementation team for this engagement to include the following:

      Project Manager
      - Work with NIC TAM/PM to get feeds turned on
      - Present metrics for User Acceptance Testing
      Data Architect
      - Retrieve data once credentials have been provided.
      - Set up integration
      - Build standard metrics

2. Build the integration and standard metrics.

3. Conduct integration testing.

4. Conduct validation testing

5. Support Customer in User Acceptance Testing in the Performance Dashboard

6. Respond to defects identified during Customer's User Acceptance Testing.

7. Scope any "custom" metrics that may be requested.

Requested Metrics - *The below metrics are merely examples.*

Metric Name	Abbreviation	Metric Description	SF Object/Field	Notes
Cases Created	Cases Created	The number of Cases Created	Case	Record count from Case object
Cases Closed	Cases Closed	The number of Cases Closed	Case: Status	Record count from Case object where status is closed

Clearview Scoping Acceptance
Clearview Signature:
Printed Name:
Title:
Date:

Customer Acceptance
Client Signature:
Printed Name:
Title:
Date: