ClearView

Performance Management **INTEGRATIONS**

Integrations can be simple or complex. Check phases 01, 02, and 03 to see if what you're looking for will integrate with ClearView. Keep in mind that ultimately we can make an integration work if it is properly scoped.

PHASE 01
Always the phone system: ClearView

PHASE 02
Turn Key: Echo, Engage, Discover, IEX, QM Pro, WFM Pro,Salesforce, Zendesk, Hubspot, Spice

PHASE 03
If you don't see the system in phase 01 or 02, spot check the three rules below.

Rule 01

CONNECTION

How can we connect to it?

A. Rest API **B.** Pull

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 documenta tion, 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.*

Rule 04

PRIMARY 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 or agent ID.

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.**