

Connect your existing phone system with your CRM

Key Features



Click-to-Dial

Dial automatically when any phone field is clicked.



Screen Pop

Quickly show caller information before a call is connected.



Automated Call Logging

Rapidly add call notes with configurable log templates and wrap-up codes.



CRM Screen Transfer

Easily share information and related objects with transferred calls.



Click-to-Create a Case

Create a new case and relate it to a caller automatically.



Intelligent Dialing

Connect successfully no matter what area or format phone numbers are in.



Workflow Support

Flexible enough to adapt to unique and complex workflows



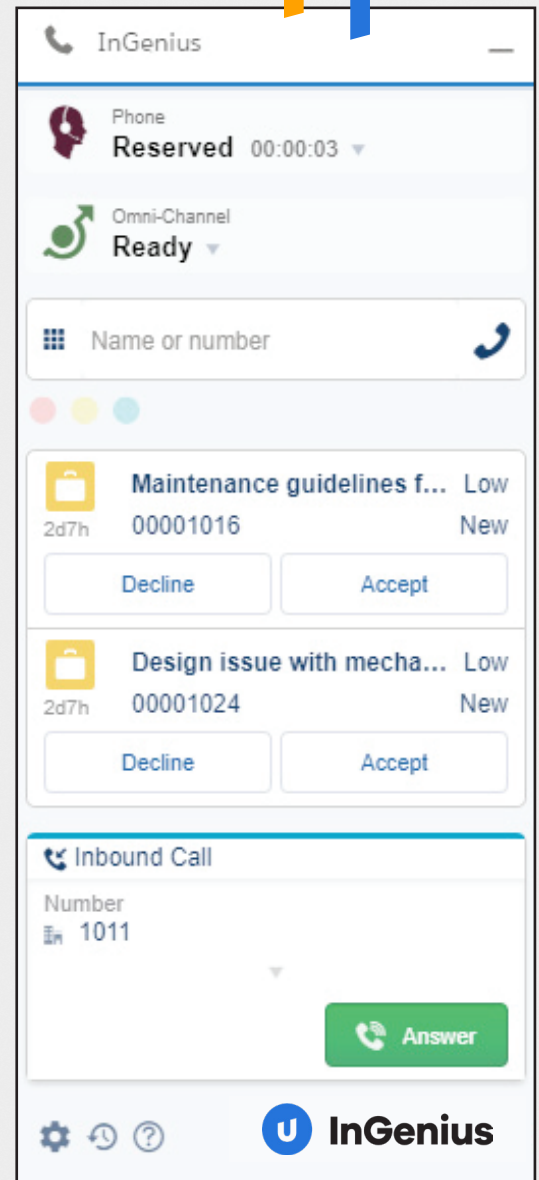
Omnichannel Service and Sales

Enable blended agents with automated presence sync and a single UI.



Simple Administration Within Your CRM

Use and manage InGenius from within your CRM.



Supported Phone Systems

- Asterisk
- Avaya
- Cisco
- Genesys

Supported CRMs

- Microsoft Dynamics 365
- Salesforce
- ServiceNow



Enterprise Proven

Choose a solution with the stability and scalability used by Fortune 500 companies. InGenius needs no desktop install, centralizes user management and simultaneously integrates with multiple phone systems. Your project is guaranteed with a no-risk trial.

Secure

Keep your information secure with infrastructure designed to protect to the highest standards. With Upland InGenius, all data stays within your firewall and no access is needed by the computer telephony integration server.

Flexible

Decide how you want computer telephony integration to work for your contact center. Use advanced configuration capabilities with your existing call queues, routing, IVR and workflows to easily fulfill your unique requirements.

Experienced

Access unmatched expertise on connecting telephony and CRMs. Upland InGenius is focused solely on computer telephony integration and has a team of experts dedicated to innovating next generation CTI within a fully-owned technology stack.

InGenius offers certified integration between the leading telephony platforms and Microsoft Dynamics 365, Salesforce or ServiceNow.

Asterisk

AVAYA



GENESYS™



servicenow™

World-class contact centers choose InGenius to drive agent productivity



For more information on Upland InGenius,
visit uplandsoftware.com/ingenius

Upland Software helps organizations just like yours increase agent productivity and earn happier customers with a seamless connection between your phone system and your CRM. Equip your service, sales, and ITSM teams with the tools they need to drive customer satisfaction today!

