

# The Hows and Whys of Integration

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# Today's Mission

- To truly deliver knowledge at the point of action, it's often necessary to integrate RightNow with ERP applications, telephony infrastructure, and other enterprise systems.
- This session will explain how these integrations are performed and will offer real-world examples to highlight the significant business benefits that they deliver.



# Benefits of Integration

- Optimize Revenue Opportunities
- Improve Customer Service
- Streamline Business Processes
- Reduce Operational Costs
- Facilitate Improved Decision-Making

**Knowledge at the point of action!**



# Knowledge At The Point Of Action

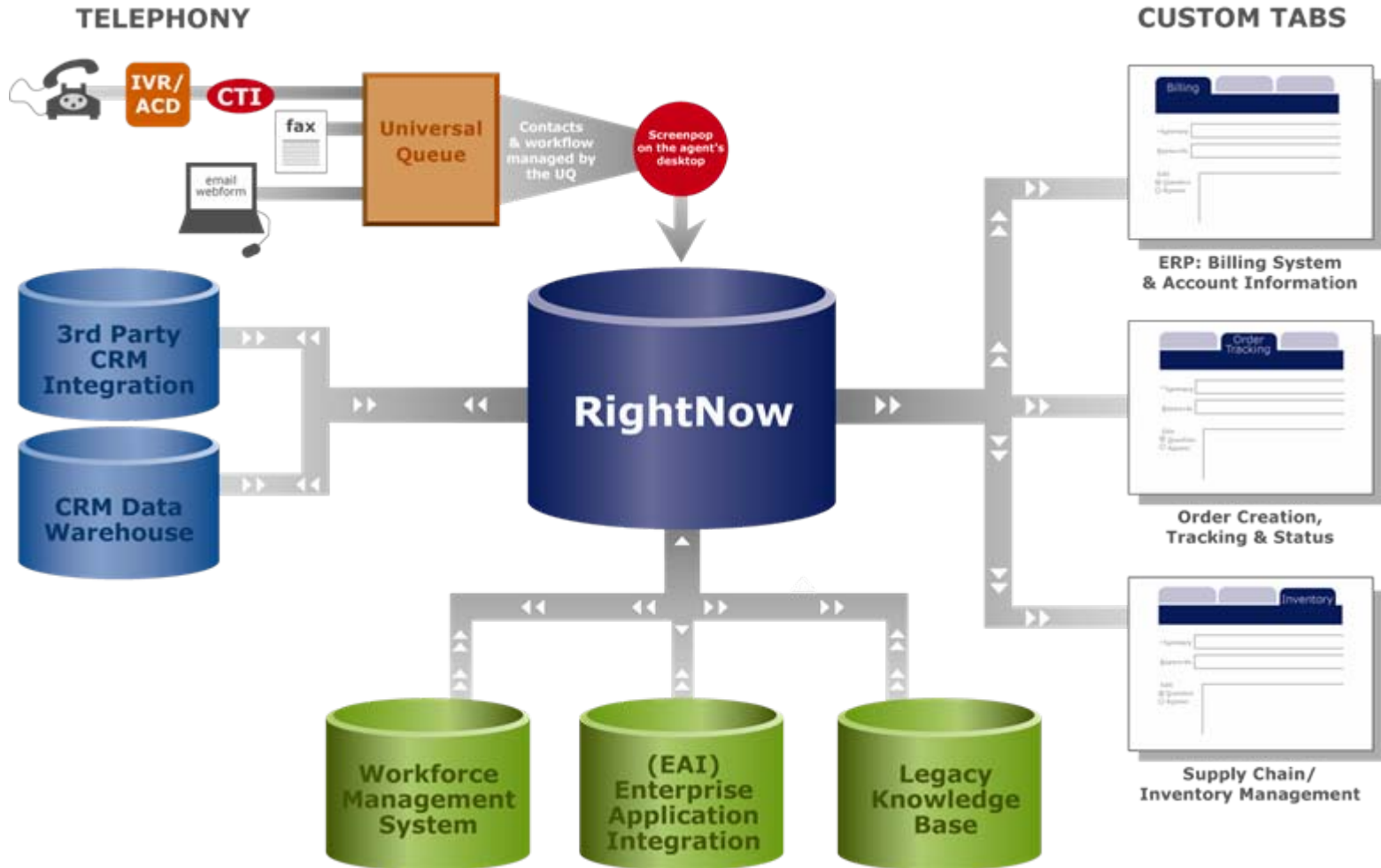
- The key to consistently providing an excellent customer experience
- Person:
  - May be a customer, front line employee, or outsourcing partner
- Knowledge:
  - May be about a specific order, your company's merchandise return policy, or a third-party product
- Point of Action:
  - May be a phone call, your website, or a visit to a local dealer



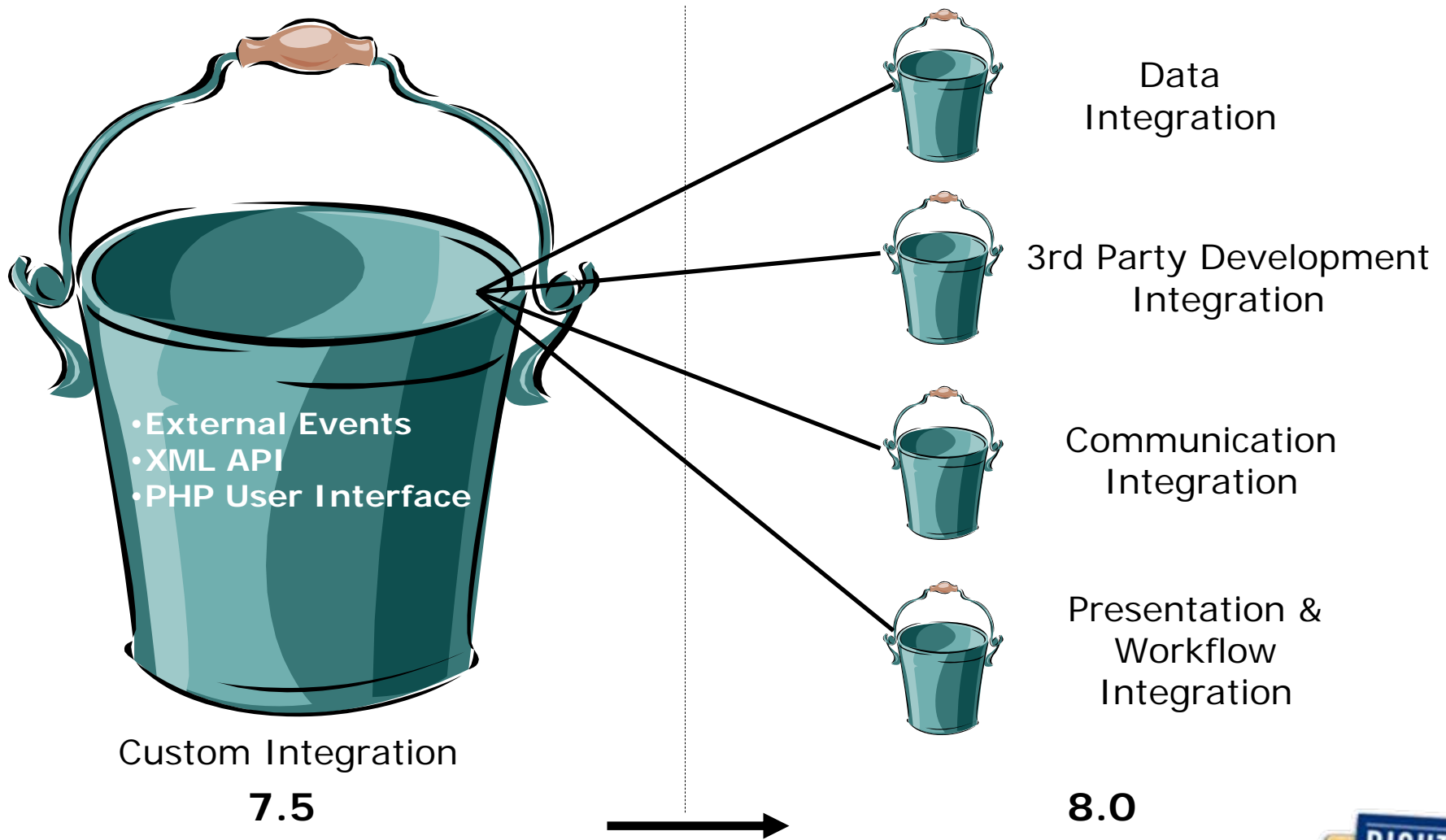
**Integration is a method of providing knowledge at the point of action!**



# Integration Overview



# Integration Based on Business Need



# Data Integration

## Requirements

- Enable exploration, extraction, transformation and data delivery
- Provide management, configuration and monitoring tools
- Built on a scalable enterprise-level data integration platform

## Today in RightNow 7 Data Integration is

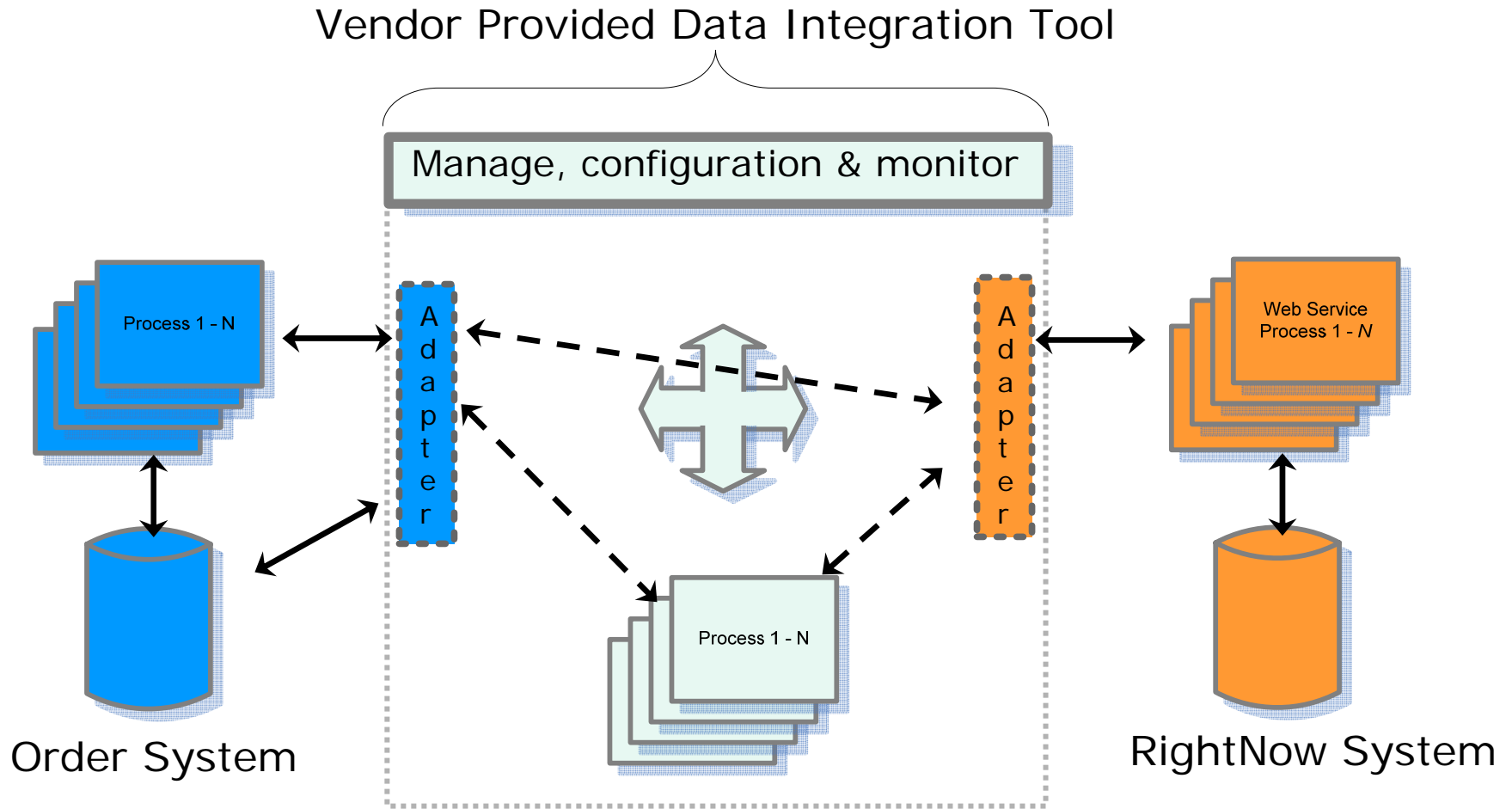
- Custom integration via XML API
- Delivered by Pro Services, have completed a number of custom integrations

## RightNow 8 will

- Provide data integration via the current XML API
  - o same as in V7.x – plus minor enhancements



# Data Integration Architecture



# Communication Integration

## Requirements

- Enable the delivery of phone, email, chat, and backoffice interactions, including relevant CEM data, to an identified resource
- Provide management, configuration, and monitoring tools
- Built on a scalable enterprise-level Communication integration platform

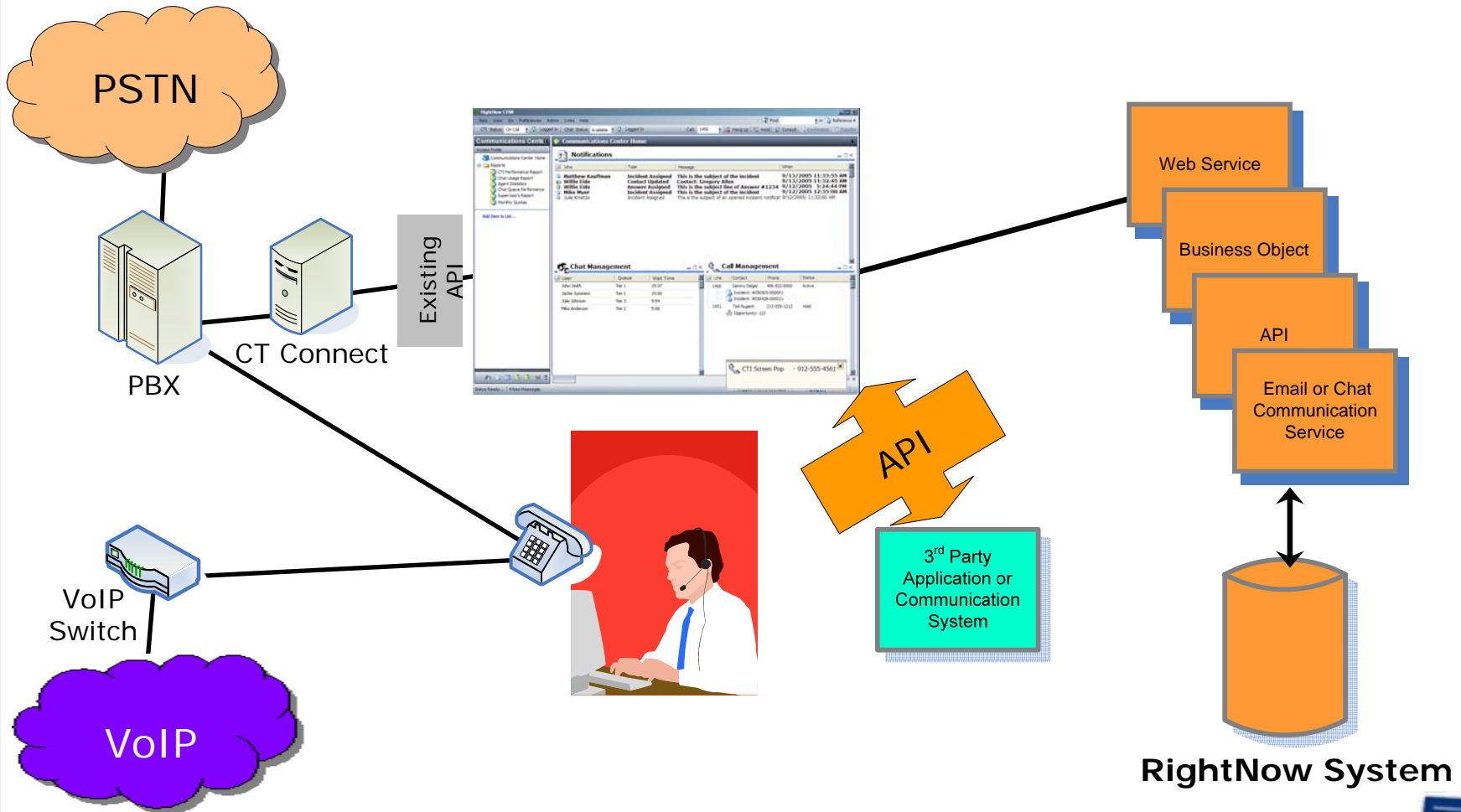
## Today in RightNow 7 Communication Integration is

- Custom integration via the XML API, TAPI (R-TAPI) and CTI (CT-Connect)
- Delivered by Pro Services and/or partnerships: On-demand (Five 9s & Echopass), Integrators (SimpliCTI & MicroAutomation), On-premise (Zeacom)

## RightNow 8 will

- Add a Communication Center component which includes client-side elements like: screen-pop/toasts, notifications, configurable media components, standard & customizable reports, softphone, media toolbars and, enhanced management and configuration options (configurable ACD/PBX strings)
- Management and configuration support for Avaya CTI (preconfigured profile)

# Communication Integration Architecture



# Presentation & Workflow Integration

## Requirements

- Enable configuration of the user interface components to reflect profile specific workflow
- Provide events and messaging between client components and external components (example: custom tab and 3<sup>rd</sup> party application)
- Enables the system administrator to customize the user interface by profile thereby reflecting the user's workflow requirements

## Today in RightNow 7 Presentation & Workflow Integration

- Requires PHP level customization of code (server and client)
- Delivered by Pro Services or highly skilled PHP developers

## RightNow 8

- Delivers an extensive set of user interface customization options with M&C (screen designer, dashboard designer and report designer)



# 3<sup>rd</sup> Party Integration

## Requirements

- Enable *extensive* customization and integration
- Provide skilled consumers with access to APIs and sample code
- Access to support resources trained and skilled in the development of applications using Developer Toolkit APIs

## Today in RightNow 7 3<sup>rd</sup> Party Integration is

- Custom integration via the XML API
- Delivered by Pro Services and/or 3<sup>rd</sup> parties

## RightNow 8

- Existing V7 API will continue with minor enhancements



# What to Consider When Integrating

- What's the business reason for this integration?
- What's the budget for this integration?
- What's the impact on the customer?
- What internal resources are involved?
- What's the timeline for delivery?
- How are we going to integrate, from a technical perspective?
- Are there any security implications?



# Primary Methods of Integration

- External Events
  - Real-time events executed upon actions in the RightNow system (Insert, Update, Delete)
- SOAP / XML API
  - Flexible method of integration using a standard format to share data across platforms, languages, and applications
- Automated Imports
  - Batch method used to populate the RightNow database with data from external sources
- Custom Tabs
  - Provides agents quick access to web-based applications and/or external data stored within the RightNow database

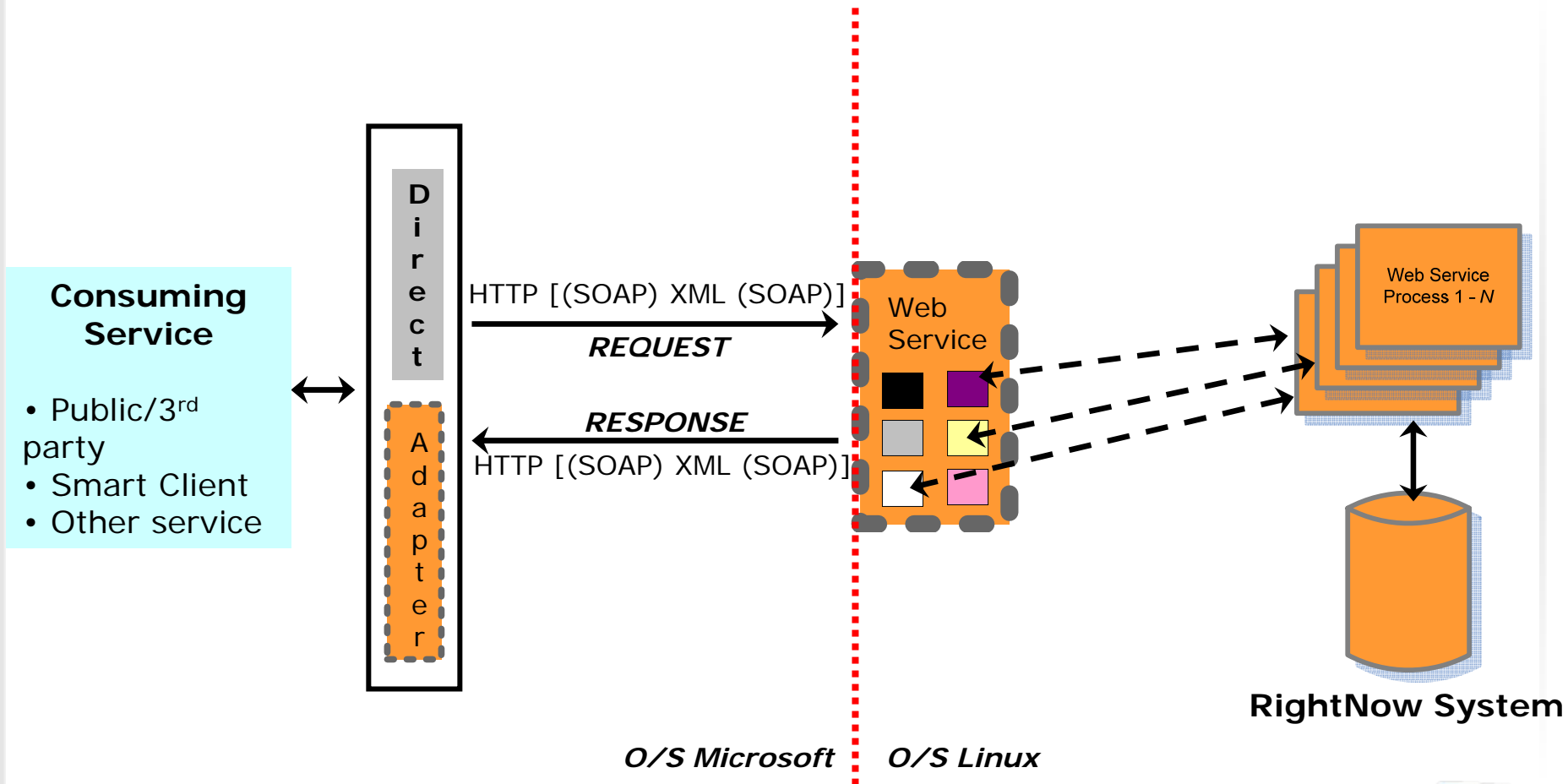


# How does RightNow integrate?

- Transport:
  - HTTP, Email, FTP
- Data Format:
  - SOAP / XML, CSV, Delimited Flat File
- Timing:
  - Real-time, Batch
- Security:
  - HTTPS, Encryption (PGP, 3DES etc.), SFTP
- Data Flow:
  - Bi-directional, One-way



# SOAP In RightNow 8



# External Events

- Business Scenario:
  - When a contact is created and/or updated in the RightNow application, I would like to send that information to my data warehouse. The information needs to be transported real-time and in a secure manner.
- Solution:
  - Using a Contact Insert and Update External Event (PHP Script), an XML document can be formatted and posted over HTTPS to the data warehouse. Once posted, an XML response is returned and the script continues to process the remaining logic.



# XML API

- Business Scenario:
  - My agents use an application in our retail stores to gather customer information when they purchase a product, and I would like to feed that information into RightNow to create/update a contact record.
- Solution:
  - RightNow provides an XML API that allows for creation and/or updates of a contact record. The XML can be posted real-time over HTTP/HTTPS or sent through an email for processing.



# Automated Imports

- Business Scenario:
  - We often hold trade shows in which we gather mass amounts of contact details such as name, address, and email address. I would like to automate the import of that data into RightNow for marketing purposes.
- Solution:
  - RightNow can create a scheduled event to retrieve files from an external FTP server and import the data into the RightNow database. Once the import has been created the first time, the event just needs to be scheduled to run every day/week/month.



# Custom Tab

- Business Scenario:
  - In order to present my customers with their order information stored in an external database, I would like to click on a custom tab within the RightNow application and have that information displayed while I'm on the phone with the customer.
- Solution:
  - RightNow will post an XML document to the external system passing the necessary authentication and search criteria to retrieve the orders. The external system will respond with an XML document which is then parsed by RightNow and displayed to the agent in a user friendly manner.



**Questions?**



# Resources

- White Paper: “Your Guide to Integrating RightNow Service with Other Enterprise Applications”
- Professional Services Booth
- [Rightnow.custhelp.com](http://Rightnow.custhelp.com)
- Your account manager

