

Fact Sheet

USU Knowledge Management in 3rd Party Case Management Software

USU Knowledge Management is designed to bring knowledge to people when and wherever they need it. As a consequence USU Knowledge Management comes with a full set of interfaces that enables integration with any other 3rd party software.

Quick access to knowledge is especially important for service agents who are expected to answer questions or solve problems for customers and users quickly and correctly. Service agents usually work with case management software like CRM or Helpdesk applications. USU Knowledge Management integrates seamlessly so agents can access it from their typical work environment.

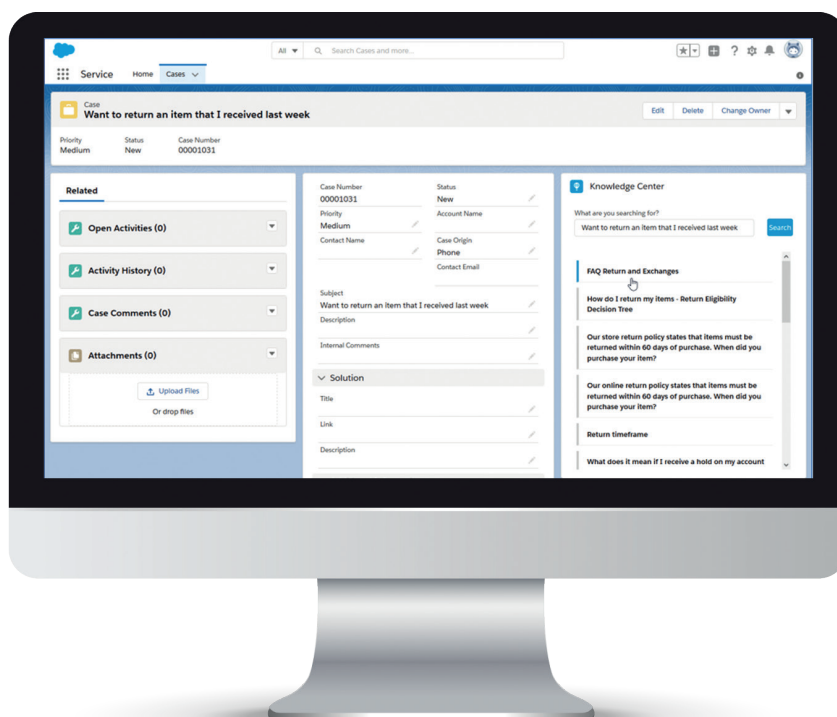


Figure 1: Integration Example – USU Knowledge Management and Salesforce

Use Cases

Search: From the case management application searches can be started both manually and automatically once a case or ticket is opened. Search phrases are automatically extracted from the case/ticket and forwarded to USU Knowledge Management, which returns a list of search results.

Browse results: From their case management application agents can browse through the search results. These might include static documents, multimedia content, active documents or guided dialogs. Agents can also use filters to narrow down the results list. With active documents or decision trees, agents just need to follow the guided dialog to navigate to the answer they were looking for.

Save results: With one click the selected answer or solution can be saved in the case/ticket, either as a link to the original document or as a copy of it. This way agents can quickly document how the case/ticket was resolved. This action also triggers the self-learning algorithm of USU Knowledge Management so it will better serve subsequent search requests with similar intentions.



**Get in touch for
further information.**

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Standard Integrations

USU provides a set of standard integration modules with popular CRM and Helpdesk applications. These modules contain USU Knowledge Management widgets which can be configured and integrated into the UI of the CRM/Helpdesk application and handle the communication with USU Knowledge Management. It makes no difference whether these applications run on-premise or in the cloud. Using these modules, integration of these tools can be completed within minutes.

Some CRM and Helpdesk software vendors have checked and certified the compatibility of USU's integration modules with their tools and offer them through their marketplace. You can find us on Salesforce, Genesys, and Nice.



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Custom Integrations

All standard integrations are pre-built by USU using the USU Knowledge Management Web API. This API is also available to customers so that you can easily develop your own integration, bringing knowledge into whatever software you like.

Smart businesses use USU

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