



GoToAssist®

FACT SHEET

Citrix® GoToAssist® Integration Services APIs

Citrix Online's GoToAssist Integration Services enable you to seamlessly integrate the GoToAssist solution with your existing support infrastructure.

We offer many flexible Application Programming Interfaces (APIs) to help you increase efficiency across your support organization by optimizing your implementation of GoToAssist and streamlining your workflow.

Through these APIs, your support agents can use their standard tools and provide more efficient service through streamlined functionality and real-time access to information from the GoToAssist session. GoToAssist data can be automatically captured and stored in your existing infrastructure, ultimately giving your support agents more time to focus on solving customer issues. Managers can also benefit from centralized access to information, giving them the ability to analyze the complete support experience and eliminating manual integration of disparate data.

AGENT-SIDE API

The Agent-Side API integrates the functionality of the GoToAssist HelpAlert application with your existing applications. This enables your support agents to use their standard tools (e.g., CRM, customer database, etc.) as their primary interface while leveraging the HelpAlert application in the background. Standard tasks can be automated while agents benefit from using one single interface when assisting customers.

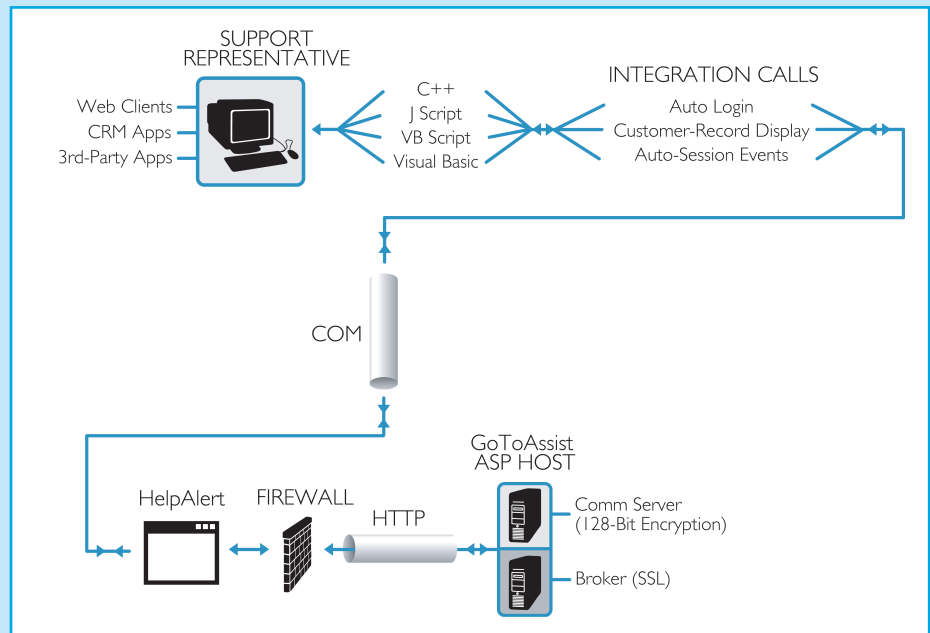
The Agent-Side API is based on Microsoft's Component Object Model (COM) technologies and can be used with programming languages such as C++, VisualBasic, VBScript, JScript and any language that supports COM. The complete toolkit includes the APIs, documentation and sample code.

BENEFITS

The Agent-Side API helps agents save time by automating many of the steps they perform. Processes previously performed manually when using GoToAssist (such as associating a customer with an existing CRM record or capturing real-time chat and remote diagnostics) can now be accomplished in a fraction of the time. By streamlining these processes, each agent is able to more quickly serve customers, resulting in reduced incident-handling time as well as increased customer satisfaction.

EXAMPLE IMPLEMENTATIONS

- **Instant Sign-on:** Agents can be automatically logged in to the GoToAssist solution after logging in to an existing application, such as your CRM or help desk system, and initiate screen-sharing sessions from within that application.
- **Capture Customer Inputs:** End user inputs can be automatically entered into a new CRM customer record displayed on the agent's screen. This eliminates the need for the agent to manually search for a customer's information during a GoToAssist support session.
- **Link GoToAssist Sessions to CRM**



Tickets: The Session ID and other session events can be automatically tied to a ticket/customer record in your existing CRM (or other) database.

PHONE MODE API

The Phone Mode Web-Services API enables agents using Web browser support applications to easily generate and cancel GoToAssist connection codes from their Web-based application. Using this generation method, the CRM ticket number, case ID or other unique identifier can be instantly associated and stored with the rest of the GoToAssist session data. Later retrieval of the hosted GoToAssist session data can include the unique identifier from your support application which enables easy integration of the data into your support systems.

BENEFITS

The Phone Mode API makes it easy to integrate with SaaS or other Web browser support systems. Storing the unique identifier from the primary system with the GoToAssist session data makes it easy to implement back-end reporting. Reports are more comprehensive since data from both systems can be easily joined for full analysis and trend tracking.

EXAMPLE IMPLEMENTATION

- **Web-based Interface:** An agent can initiate a GoToAssist screen-sharing session from within a Web-based application, such as a CRM system, and simultaneously pass a unique ID to the GoToAssist system to be stored with the session data.

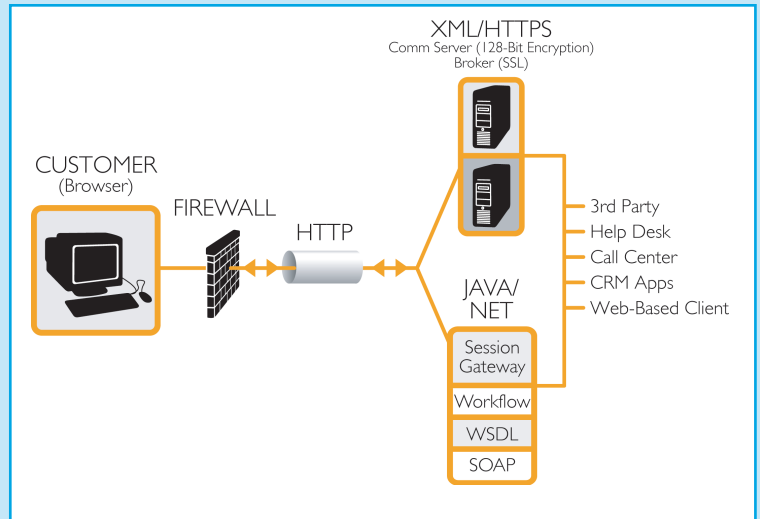
SESSIONS API

The Sessions Web-Services API allows you to gather and send data from the GoToAssist service to other systems (such as CRM systems and databases) within your existing support infrastructure. The Sessions Web-Services API provides access to the GoToAssist session data using the most secure access methods (SSL) and fully supports standard Web-services technologies, including HTTPS, XML, SOAP and WSDL.

An easy-to-use integration toolkit contains the APIs and documentation, along with sample code using C++, Java, .NET and COM.

The GoToAssist session data you can access in real time includes:

- Agent identifier
- GoToAssist Session ID reference
- Entry portal information (point of session origination)
- Session start and end time
- Session duration
- Required fields captured in the GoToAssist portal
- Session events (such as files transferred and chat log)
- Session resolution: resolved/unresolved
- Session rating and feedback by customer
- Link to unique digital session replay in the GoToAssist Management Center



BENEFITS

Integrating GoToAssist data into your environment enables you to efficiently close the loop on your customer interactions. Because data from the entire support experience is captured and integrated with your existing systems, you can easily report on and evaluate the complete support experience. Manual and duplicate data entry is eliminated, enabling your agents to spend more time focusing on resolving customer issues.

Having GoToAssist session data integrated with your environment also provides a single data source so you can quickly generate and analyze reports showing your customers' entire support experience. You can then leverage this information for agent training and coaching to continuously improve your support offering.

EXAMPLE IMPLEMENTATIONS

- **Save Session Data Locally:** The most common application of the Sessions Web-Services API is to integrate GoToAssist session information with your existing CRM solution. At the end of the GoToAssist session, session data is captured and automatically fed into your CRM solution. A complete view of the support interaction is then stored in your existing infrastructure for reporting and analysis. The capability to replay the GoToAssist session can also be associated with a customer ticket, enabling direct access to the session recording via the password-protected GoToAssist Management Center.
- **Trigger Events:** The Sessions Web-Services API can also be used to trigger events and automatic notifications based on GoToAssist session details. For example, when a customer provides a positive or negative rating on a support session, a manager can immediately be notified. A manager can also be notified if the number of customers waiting for Web-based help reaches a certain threshold.

INTEGRATION SERVICES DATABASE PACKAGE

As an alternative to the Sessions Web-Services API, Citrix Online provides an out-of-box solution that enables you to download hosted session data directly into a local database. The GoToAssist Integration Services Database package is an easily installable application that provides an automatic method for downloading hosted data. Please contact your sales representative for more information.

MONITORS API

The Monitors Web-Services API allows you to monitor GoToAssist sessions and support agents in real-time. Using this API you can determine the status of each agent in your support infrastructure so that incoming support requests can be routed appropriately.

BENEFITS

Knowing which agents are in GoToAssist sessions and which agents are available helps determine where incoming support phone calls or GoToAssist Web-based requests should be directed. Combining this type of integration with your “smart queuing” or ACD (automated call distribution) systems helps you provide the best support for your customers. The Monitor Web-Services API can help you achieve a complete integration with your defined routing systems.

EXAMPLE IMPLEMENTATIONS

- **Route Calls:** The Phone Mode API can determine when an agent is in a GoToAssist session. This agent status data is provided to the ACD system so that incoming phone calls are routed to other available agents.
- **Trigger Alerts:** An alert can be triggered if the number of customers waiting in a GoToAssist queue for Web-based help reaches a certain threshold. Knowing how long customers are waiting for support can help management better schedule appropriate resources.

For more information on GoToAssist, please visit www.gotoassist.com.

Citrix Online

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