

ilink
TeamCall Salesforce.com
for
Innovaphone

innovaphone
PURE IP COMMUNICATIONS



iolink



Agenda

- The Softphone look & feel
- Salesforce workflow integration:
 - outbound call
 - call wrap-up
 - inbound call
 - activity history / call data reports
- integration with Innovaphone PBXes and IP phones
- customizing
 - Call Center configuration
 - softphone layout



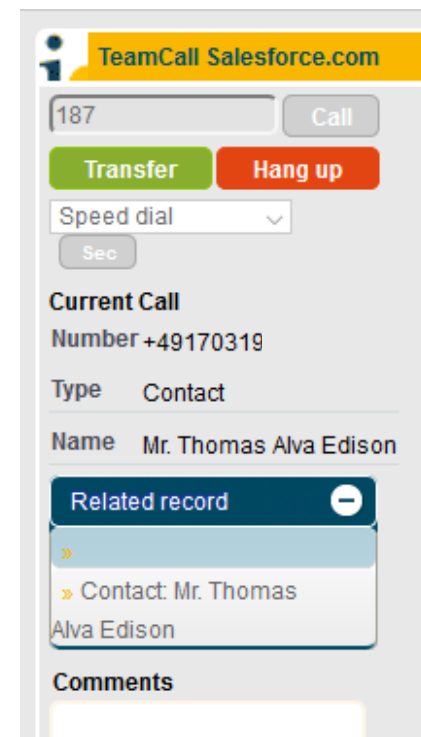
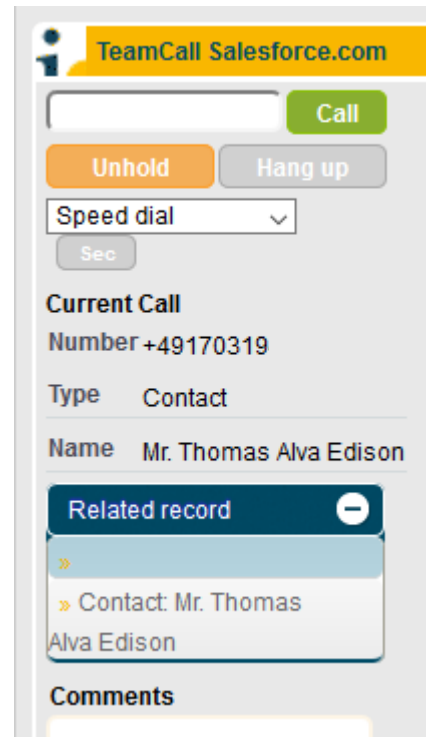
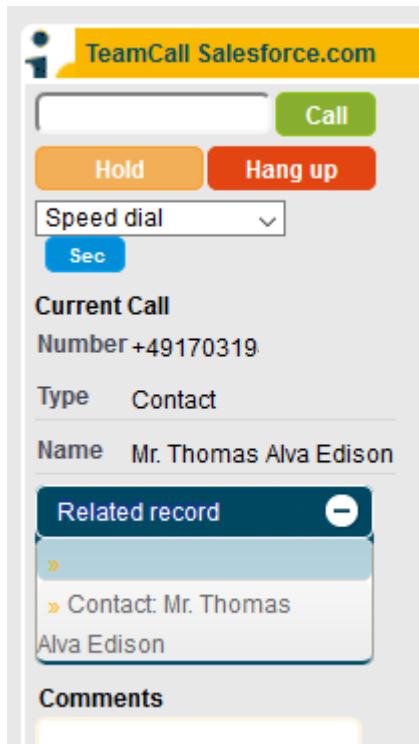
1. Softphone look & feel - idle state console mode

The screenshot displays a web browser window with two tabs: 'Console ~ Salesforce - Develop' and 'Call_Type_My_Calls_ThisWeek'. The address bar shows the URL 'https://eu12.salesforce.com/ui/desktop/DesktopPage'. The Salesforce navigation bar includes 'Developer Console', 'Help', and 'Logout'. Below this is a navigation menu with 'Console' selected. The main content area shows a contact record for 'Edison, Thomas Alva' at 'General Electric', with title 'Inventor and Businessman' and phone number '+493028526'. The email is '@iilink.de'. On the left, a 'TeamCall Salesforce.com' softphone interface is visible, featuring a 'Call' button, 'Hold', and 'Hang up' buttons, a 'Speed dial' dropdown, and a list of 'Latest calls'.

Contact Detail

Contact Owner	[Change]	Phone	+493028526
Name	Mr. Thomas Alva Edison	Home Phone	+493028526
Account Name	General Electric	Mobile	+491703194
Title	Inventor and Businessman	Other Phone	
Department	Electricity	Fax	
Birthdate	11.02.1874	Email	@iilink.de
Reports To	[View Org Chart]	Assistant	William Joseph Hammer
Lead Source	Web	Asst. Phone	
Mailing Address	Menlo Park 08820 Edison New Jersey U.S.A.	Other Address	
Languages	English	Level	

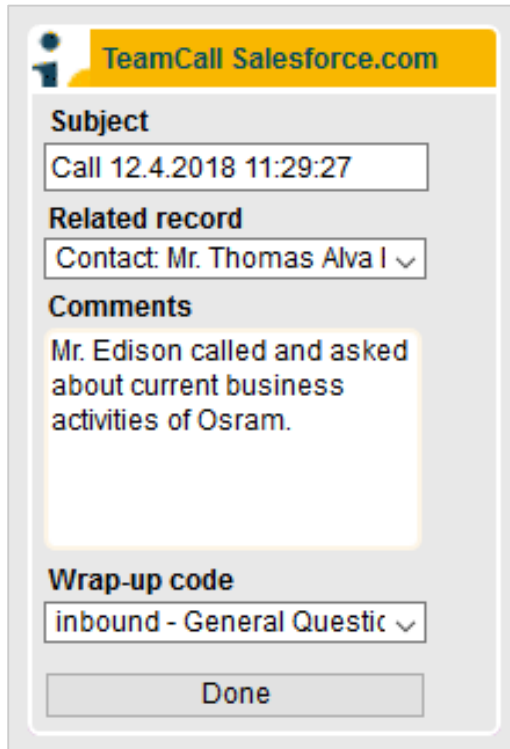
2. hold/unhold / consultation / transfer – phone functions



- ✓ Softphone buttons are activated with respect to current phone status
- ✓ you can *hold/unhold* your current call
- ✓ for a *consultation* call just call 2nd party

- ✓ in a consultation call you can *transfer* your call to a 2nd party
- ✓ or you can hangup the transfer and then *return* to your first call

3. Call wrap-up mode: comments and call classification



The screenshot shows a 'TeamCall Salesforce.com' window with the following fields:

- Subject:** Call 12.4.2018 11:29:27
- Related record:** Contact: Mr. Thomas Alva I
- Comments:** Mr. Edison called and asked about current business activities of Osram.
- Wrap-up code:** inbound - General Questic
- Done** button

- Salesforce workflow offers call classifications
- ✓ subject and related record are auto-filled in
 - ✓ you can edit/change them
 - ✓ you can add a comment for later reference
 - ✓ you can classify your call for reporting
 - ✓ the codes are customizable
 - ✓ you can setup different codes for inbound/outbound calls
 - ✓ generate a task or a event from your call activity



4. Inbound call / caller identification

TeamCall Salesforce.com

+49170319

Type Contact

Phone +493028526

Title Inventor and Businessman

Salutation Mr.

Name Mr. Thomas Alva Edison

Answer

Related record
⊖

» Contact: Mr. Thomas Alva Edison

Contact

Mr. Thomas Alva Edison

[Opportunities \[0\]](#) |
 [Cases \[0\]](#) |
 [Open Activities \[1\]](#) |
 [Activity History \[5+\]](#) |
 [Campaign History \[0\]](#) |
 [Notes & Attachments \[0\]](#) |
 [HTML Email Status \[0\]](#)

Contact Detail
Edit Delete Clone Request Update

Contact Owner [Change]		Phone +493028526
Name Mr. Thomas Alva Edison	Home Phone	
Account Name General Electric	Mobile +491703194	
Title Inventor and Businessman	Other Phone	
Department Electricity	Fax +493028526199	
Birthdate 2/11/1874	Email @ilink.de	
Reports To [View Org Chart]	Assistant William Joseph Hammer	
Lead Source Web	Asst. Phone	
Mailing Address Menlo Park Edison, New Jersey 08820 U.S.A.	Other Address	
Languages English	Level	
Created By 11:21 AM	12/16/2014	Last Modified By 11:22 AM, 12/17/2014
Description A great American inventor of many devices which greatly changed life around the world, e.g.: - the phonograph - the motion picture camera - the longlasting light bulb - power distribution		

Edit Delete Clone Request Update

5a. Salesforce user call activity history - call data overview

Activity History							
		Log a Call	Mail Merge	Send an Email	View All		
Action	Subject	Related To	Task	Due Date	Assigned To		Last Modified Date/Time
Edit Del	Call 12.4.2018 11:29:27	General Electric	<input checked="" type="checkbox"/>	12.04.2018	Tho	rs	12.04.2018 12:04
Edit Del	Call 12.4.2018 11:52:14	General Electric	<input checked="" type="checkbox"/>	12.04.2018	Tho	rs	12.04.2018 12:04
Edit Del	Call 12.4.2018 11:58:45	General Electric	<input checked="" type="checkbox"/>	12.04.2018	Tho	rs	12.04.2018 12:03
Edit Del	Call 12.4.2018 12:01:01	General Electric	<input checked="" type="checkbox"/>	12.04.2018	Tho	rs	12.04.2018 12:03
Edit Del	Call 6.4.2018 14:37:59	General Electric	<input checked="" type="checkbox"/>	06.04.2018	Tho	rs	12.04.2018 12:04

[Show more »](#) | [Go to list »](#)

- ✓ get a quick and clear overview about your call activities of a contact
- ✓ edit your tasks to add more information

5b. Salesforce.com user call activity history – detailed call data

Task Call 12.4.2018 11:29:27

1

7

31

[Attachments \[0\]](#)

Task Detail
Edit
Delete
Create Follow-Up Task
Create Follow-Up Event

Assigned To	Status Completed
Subject Call 12.4.2018 11:29:27	Name Thomas Alva Edison
Due Date 12.04.2018	Email @iolink.de
Phone +493028526	Related To
Priority Normal	Caller +49170319
	Called 183
	Last Hop
	Call tags external
	Call Type Inbound
	Call Duration 3
	Call Result inbound - General Questions
	Comments Mr. Edison called and asked about current business activities of Osram.
Created By 12.04.2018 11:44	Last Modified By 12.04.2018 11:44

Reminder

Reminder

Edit
Delete
Create Follow-Up Task
Create Follow-Up Event

- ✓ This view displays your call wrap-up info of a task
- ✓ drill-down a task to extract or modify your customer call data



6. Generate Salesforce supervisor reports for call statistics

Call_Type_My_Calls_ThisWeek

Report Generation Status: Complete

Report Options:

Summarize information by:

Show

Call Type

Show

My activities

Show

Completed Activities

Show

Tasks and Events

Time Frame

Date Field: Date

Range: Custom

From: 02.04.2018

Run Report

Hide Details

Customize

Save

Save As

Delete

Printable View

Export Details

Subscribe

Filtered By: [Edit](#)

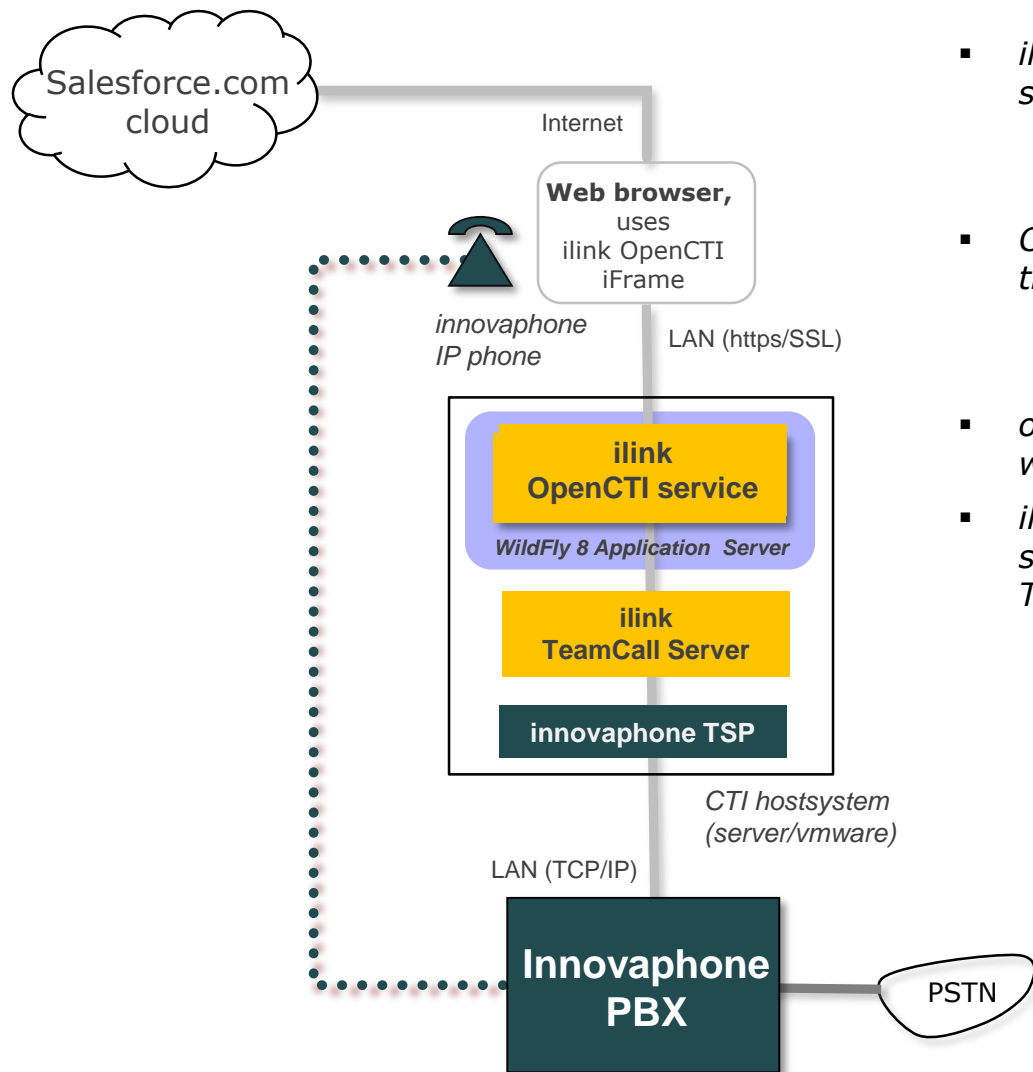
Call Type not equal to [Clear](#)

Grouped By: Call Type

Sorted By: Call Type

	Assigned	Subject	Call Duration (minutes)	Call Result	Company / Account	Contact
<input type="checkbox"/>	Call Type: Outbound (2 records)					
	Tho	rs Call 12.4.2018 11:52:14	0:04	outbound - General Questions	General Electric	Thomas Alva Edison
	Tho	rs Call 12.4.2018 12:01:01	0:04	outbound - General Questions	General Electric	Thomas Alva Edison
<input type="checkbox"/>	Call Type: Inbound (5 records)					
	Tho	rs Call 6.4.2018 14:37:59	0:26	inbound - Ghost Call	General Electric	Thomas Alva Edison
	Tho	rs Call 12.4.2018 11:29:27	0:03	inbound - General Questions	General Electric	Thomas Alva Edison
	Tho	rs Call 12.4.2018 11:52:14	0:15	outbound - General Questions	General Electric	Thomas Alva Edison
	Tho	rs Call 12.4.2018 11:57:15	0:09	inbound - Follow-Up	General Electric	Thomas Alva Edison
	Tho	rs Call 12.4.2018 11:58:45	0:07	inbound - Follow-Up	General Electric	Thomas Alva Edison
Grand Totals (7 records)						

6. Solution design iLink TeamCall Salesforce.com



- *iLink OpenCTI service runs in WildFly application server (on-premise)*
 - *it provides the Salesforce Callcenter functionality*
- *OpenCTI only exchanges call data with the user web browser (through https/SSL)*
 - *it generates/controls the softphone in the Salesforce user webpage*
- *only the user browser communicates with Salesforce.com cloud service*
- *iLink TeamCall Server connects OpenCTI service with the Innovaphone PBX through its Tapi Service Provider (TSP)*
 - *call routing is still fully handled by your PBX/ACD system*
 - *audio channel remains between PBX and station extension (IP phone)*
 - *supported Innovaphone PBX types:*
 - *IP302/305/800/810*
 - *IP0010/1060/3010/6010*



Call Center Detail		Edit	Delete	Clone
General Information				
ilink call center	ilinkTestCallcenterCisco			
Display name	ilink Test Callcenter Cisco (opencticust)			
Adapter URL	https://opencti.../CallControlWeb/			
use API	true			
Softphone height	500			
Softphone width	220			
API version	36.0			
Call center version	1.38			
Salesforce Compatibility Mode	Classic_and_Lightning			
Dialing Options				
Outside prefix	9			
Long distance prefix	1			
International prefix	01			
Application Behavior				
Save unanswered inbound	true			
Save unanswered outbound	true			
Allow empty wrap-up code	true			
Enable dial prefix support	false			
Object type used for call records	Task			
Customer-defined wrap-up field name				
Customer-defined sub wrap-up field name				
Wrap-up Codes Inbound				
Code 1	Service inquiry			
Code 2	Sales inquiry			
Code 3	VIP customer			
Code 4	Product consulting			
Code 5	Support ticket call			
Code 6	Marketing call			

7a. Salesforce Call Center configuration - Supervisor view

- ✓ activate your Salesforce Call Center for ilink OpenCTI service
 - ✓ Classic / Lightning modes are supported
- ✓ ilink OpenCTI offers Basic and Standard featuresets for Innovaphone integration
- ✓ customize your Call Center features to your needs
 - ✓ e.g. your Wrap-up codes
 - ✓ setup a standard softphone layout
- ✓ then assign Salesforce users to your Call Center



7b. Salesforce softphone layout settings

The screenshot shows the 'Softphone Layout' configuration page in Salesforce. At the top, there is a 'Select Call Type' dropdown menu set to 'Inbound'. Below this, the 'Softphone Layout' section is visible, with a 'Help about this section' link. The page is divided into two main sections: 'Softphone Layout' and 'Screen Pop Settings'.

Under 'Softphone Layout', there are two sections:
1. 'Display these call-related fields:': A list containing 'Dialed Number' with an 'Edit' link.
2. 'Display these salesforce.com objects:': A list containing 'Account, Case, Contact' with an 'Add / Remove Objects' link.

The 'Add / Remove Objects' section is expanded for 'Account'. It shows a list of 'Available' fields (Shipping Longitude, Shipping Geocode Accuracy, Phone, Fax, Account Number, Website, SIC Code, Industry, Annual Revenue, Employees, Ownership, Ticker Symbol, Description, Rating) and a 'Selections' list containing 'Account Name'. There are 'Add', 'Remove', 'Up', and 'Down' buttons between the lists. A 'Collapse' link is also present. A note below states: 'If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.'

Below this, there are two more sections for 'Case' and 'Contact' objects, each with an 'Edit' link and a note about display behavior in Salesforce Classic vs. Lightning Experience.

The 'Screen Pop Settings' section at the bottom has a 'Help about this section' link and four settings, each with an 'Edit' link:
- 'Screen pops open within: New browser window or tab'
- 'No matching records: Pop to new Contact'
- 'Single-matching record: Pop detail page'
- 'Multiple-matching records: Pop to search page'

- ✓ This setup defines the Softphone reaction and info display to inbound, outbound and internal calls
- ✓ each user can customize his personal Softphone layout



Let`s get in contact!

Innovaphone team: contact@innovaphone.com



ilink team: sales@ilink.de



More infos about ilink TeamCall Salesforce.com for Innovaphone:
see <https://tcsfdc.ilink.de/>