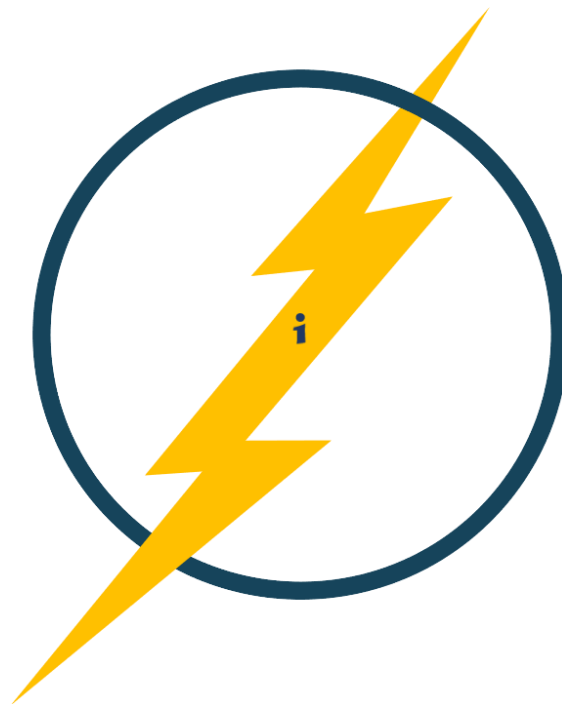


ilink TeamCall Salesforce.com for innovaphone

*Lightning telephony workflow
for Contact Center*

Whitepaper 2020



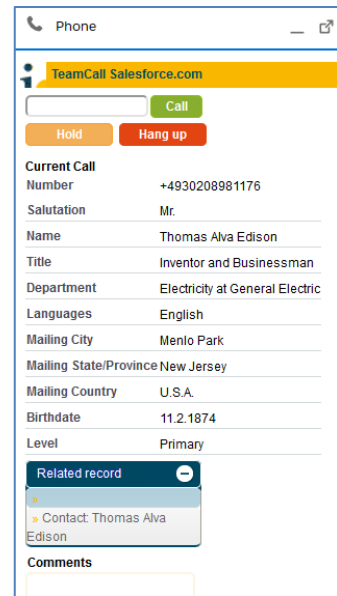


Overview

TeamCall for Salesforce.com is a TCSF Softphone app which connects your Salesforce CRM to your innovaphone system. It is an independent 3rd party solution by iLink to enable a Salesforce Call Center which provides an embedded softphone and integrated call workflow. Assigned users control their familiar office phones through the softphone in their Salesforce.com browser clients. In addition, they benefit from Salesforce Lightning call workflows to automatically transfer and store valuable customer information during phone calls. The voice channels as well as your call routings are still fully handled by your innovaphone system.

Immediately identify inbound callers through your Salesforce contacts, accounts, cases, leads etc. Classify inbound and outbound calls with wrap-up codes and comments and create subsequent tasks, events or cases. Generate quick reports of your teams call activities, call results, open tasks and more. With iLink TeamCall for Salesforce.com you maximize the impact of your outbound call campaigns, streamline your inbound service call handling and enlarge your customer database.

TeamCall for Salesforce.com (TCSFDC) is an established and secure connector for innovaphone systems. It is easy to setup and to administer at low cost.



Phone

TeamCall Salesforce.com

Call

Hold Hang up

Current Call

Number +4930208981176

Salutation Mr.

Name Thomas Alva Edison

Title Inventor and Businessman

Department Electricity at General Electric

Languages English

Mailing City Menlo Park

Mailing State/Province New Jersey

Mailing Country U.S.A.

Birthdate 11.2.1874

Level Primary

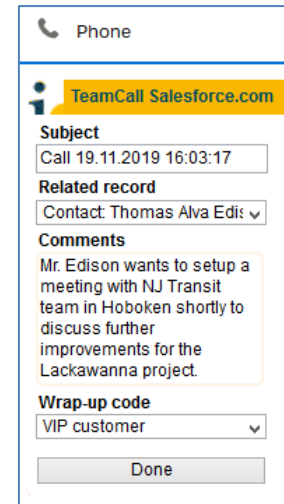
Related record

Contact: Thomas Alva Edison

Comments

Softphone functions and CTI workflow

- ✓ identify inbound calls and immediately see its associated contact, account, leads, cases or other Salesforce.com objects
 - customize your softphone information display
 - Salesforce.com popup shows object details
- ✓ outbound dial, answer call, hold/unhold, consultation call, transfer call, hang up call
 - easy and quick click-to-call with any phone number in any Salesforce.com object
- ✓ optional premium call features: speed dial, prefix-dial, auto-prefill case creation
- ✓ save important customer information to your call task with comments
- ✓ classify your inbound and outbound calls
 - choose from a picklist with up to 20 customizable wrap-up codes
- ✓ get a quick overview of users call activities with shortcuts to associated tasks
- ✓ analyze your users call activities with detailed Salesforce.com reporting statistics
- ✓ iLink TCSFDC works with Lightning, Classic and Service Cloud Console



Phone

TeamCall Salesforce.com

Subject

Call 19.11.2019 16:03:17

Related record

Contact: Thomas Alva Edison

Comments

Mr. Edison wants to setup a meeting with NJ Transit team in Hoboken shortly to discuss further improvements for the Lackawanna project.

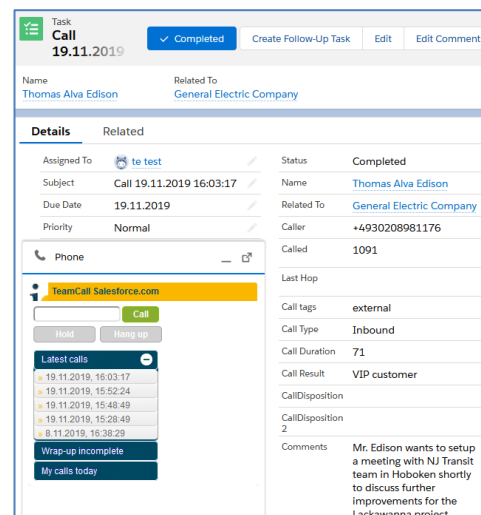
Wrap-up code

VIP customer

Done

Licensing

iLink TeamCall for Salesforce.com is available as a subscription-based per user license, distributed worldwide. We offer two different license types with different CTI feature sets: *Basic* and *Standard*. Basic contains all of the above listed features - for more details, please ask for our separate PDF document or a quotation. Support service as well as software updates are included in the license. iLink also offers optional Professional Services to accompany customers, its partners and innovaphone consultants upon demand, e.g. for larger, project-based CRM introductions, multi-site enterprise rollout scenarios and individual customizations. Please ask our Professional Services team for detailed pricing and further information (contact info see last page).



Task Call 19.11.2019

Completed

Create Follow-Up Task Edit Edit Comments

Name Thomas Alva Edison

Related To General Electric Company

Details Related

Assigned To	te test	Status	Completed
Subject	Call 19.11.2019 16:03:17	Name	Thomas Alva Edison
Due Date	19.11.2019	Related To	General Electric Company
Priority	Normal	Caller	+4930208981176

Phone

TeamCall Salesforce.com

Latest calls

- 19.11.2019, 16:03:17
- 19.11.2019, 15:52:24
- 19.11.2019, 15:48:49
- 19.11.2019, 15:28:49
- 8.11.2019, 16:38:29

Wrap-up incomplete

My calls today

Called 1091

Last Hop

Call tags external

Call Type Inbound

Call Duration 71

Call Result VIP customer

CallDisposition

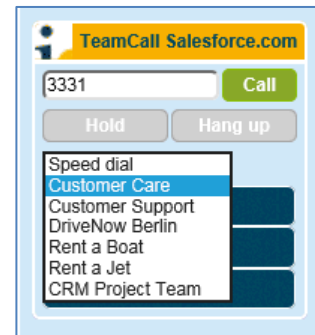
CallDisposition 2

Comments Mr. Edison wants to setup a meeting with NJ Transit team in Hoboken shortly to discuss further improvements for the Lackawanna project.

Optional premium call features

Speed Dial

If your Salesforce.com team has to dial common phone numbers quite often, it's very efficient for the users to quickly and easily invoke these numbers to speed up dialing. ilink TCSFDC Speed Dial offers an additional configuration for your Salesforce.com Call Center to setup a list of phone numbers with corresponding labels. The labels then appear in the additional Speed Dial menu in the softphone. The user just picks the label from the Speed Dial list and the phone number field of the softphone is automatically populated with the corresponding phone number ready to be dialed. Speed Dial is included in the *Standard* licensing package.



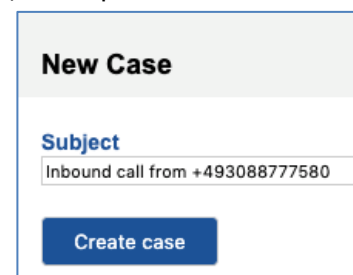
Prefix dial

Your Salesforce.com users may work for different clients and utilize individual outbound lines of your innovaphone system to call them. Here, a user manually dials a specific phone number *prefix* (e.g. *123) when he makes an outbound call to a particular customer in order to use a special outbound call line for that client. With this setup, each of your client sees an individual phone number (caller ID) in his display when he is being called. With ilink's *Prefix Dial*, you perform this kind of outbound call easily and comfortably through the integrated Salesforce softphone: after the user has clicked on the phone number in a Salesforce.com object, he is prompted to select the prefix from a picklist and just clicks the Call button to initiate the outbound call. The Prefix Dial setup is stored in a TCSFDC configuration which defines a list of prefix numbers (setup in your innovaphone system) and corresponding descriptors that are displayed for user selection in a softphone pick list.



New case creation with auto-prefill of calling data

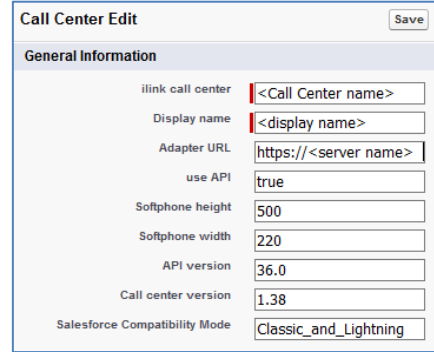
Some Salesforce.com customers use a case-oriented workflow rather than tasks or events, e.g. service center. Here, a user first tries to find an existing case in the Salesforce CRM database in order to respond to an inbound service call. If the search is successful, the user edits the proper case. But when a match cannot be determined, it's a new customer or a case for a service ticket has just not yet been generated, the Salesforce user might want to quickly create a new case for this call while he talks with his customer. Wouldn't it be smart if the new case is prefilled with all important, call related customer data to reduce editing of the new case afterwards - automatically? This optional ilink TCSFDC feature displays a plain New Case creation screen, auto-prefilled with a default (customizable) case subject. ilink's clever implementation then enables Salesforce.com to automatically add and store customer specific case data fields, e.g. priority, organization, source channel, sector and more. In addition, the new case creation features an automatic subject translation in order to use different subject wordings for different caller languages/ localizations. The caller language is detected through the caller ID and a customizable inbound caller ID white list.





Easy setup, fast rollout – no client software

iLink TeamCall for Salesforce.com (TCSFDC) is a server-based software solution which is remotely installed by iLink Professional Services on a customer host system - either on-premises in your own IT infrastructure or on your preferred cloud platform. The TCSFDC service establishes a data link to your phone system and provides the browser integrated softphone through the Salesforce.com OpenCTI framework. Your administrator just creates a Call Center which refers to the TCSFDC service (URL containing host name) and then selects and assigns users to the Call Center. The admin establishes the wrap-up codes and creates a Salesforce Softphone Layout. This layout defines which objects Salesforce searches for inbound caller IDs and which data fields are displayed in the softphone frontend upon incoming calls.



Call Center Edit	
General Information	
iLink call center	<Call Center name>
Display name	<display name>
Adapter URL	https://<server name>
use API	true
Softphone height	500
Softphone width	220
API version	36.0
Call center version	1.38
Salesforce Compatibility Mode	Classic_and_Lightning

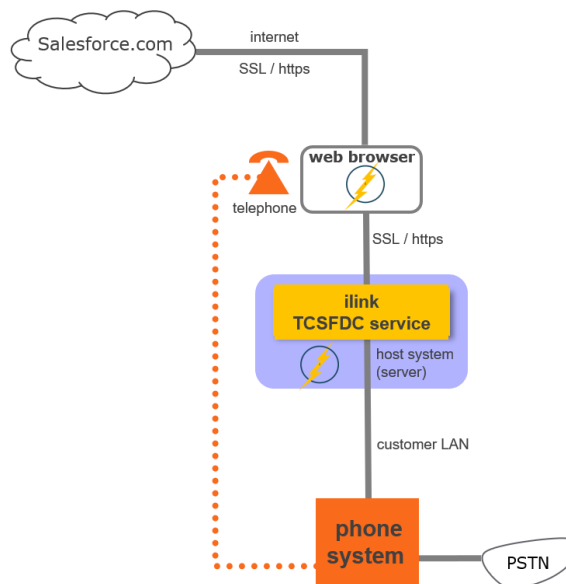
Innovaphone telephone system integration

TCSFDC service connects to your innovaphone IPVA system through iLink TeamCall Server which is included in the software. TeamCall uses the innovaphone Tapi Service Provider (TSP) to setup a data link to the IPVA.



Technical prerequisites

- innovaphone system (IPVA) with TSP
- OpenCTI supported Salesforce.com editions: *Enterprise, Unlimited, Developer*
- host system/vmware, on-premises or in the cloud - *to be provided by the customer*:
 - Windows Server 2012 R2/2016 Standard Ed. or Linux: SUSE SLES 12, Redhat RHEL 7, CentOS 7
 - 1 single-core CPU (Xeon class) 3GHz, 4 GB RAM, 20 GB HDD
 - network connection with routing to innovaphone system and user browsers
- an SSL certificate - *to be provided by the customer*
- user web browser (most recent version): Firefox, Chrome, Internet Explorer



About ilink

Since 1990 ilink has been developing software solutions and offering products and services for Unified Communications (UC) to its partners and customers.

In addition to our standard UC products for telephony and audio integration, ilink customers especially rely on our software for enterprises and contact centers. With close focus on customer requirements, our individual solutions intelligently link state-of-the-art UC systems in the datacenter and in the cloud.

With over 25 years of excellence in the implementation of ambitious projects, ilink delivers outstanding know-how through its strong Professional Services team.

ilink Kommunikationssysteme GmbH is an independent and international operating company based in Berlin, Germany, an innovaphone and a Salesforce.com business partner for over ten years. You are welcome to contact our smart Professional Services team or innovaphone and its resellers for further information about ilink's Salesforce.com integration solutions.

Contact

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