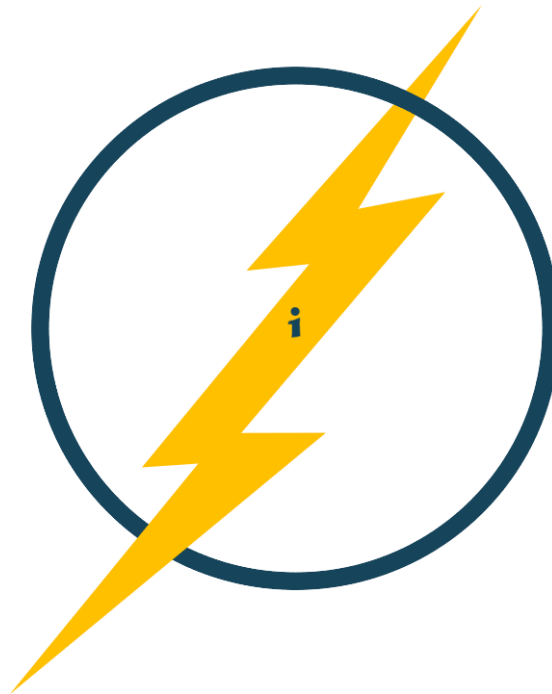# ilink TeamCall
# Salesforce.com for

innovaphone

communicate. connect. collaborate.

*Lightning telephony workflow*

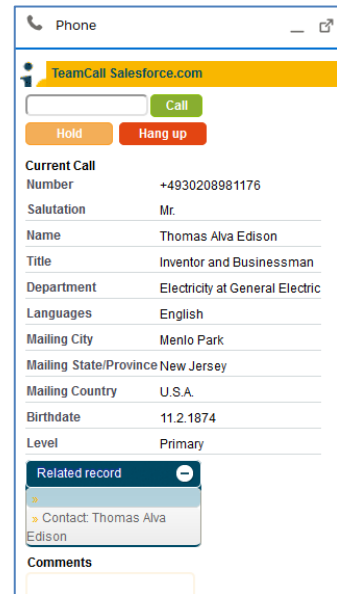*for contact center*

Whitepaper 2020

## Overview

TeamCall for Salesforce.com is an ilink 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 the integrated ilink softphone 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. Please see our product video on https://www.ilink.de/tcsfdc/index-en.html#features.

## Softphone functions and integrated workflow for calls

- ✓ identify inbound calls and immediately see its associated contact, account, leads, cases or other Salesforce objects
  - o customize your softphone information display
- ✓ 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 object
- ✓ save important customer information to your call task
- ✓ classify your inbound and outbound calls – choose from a picklist with up to 20 customizable wrap-up codes
- ✓ optional premium call features: speed dial, prefix-dial, auto-prefill case creation; ACD and IVR integrations
- ✓ NEW: softphone supports call steps in High Velocity Sales Cadences
- ✓ 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
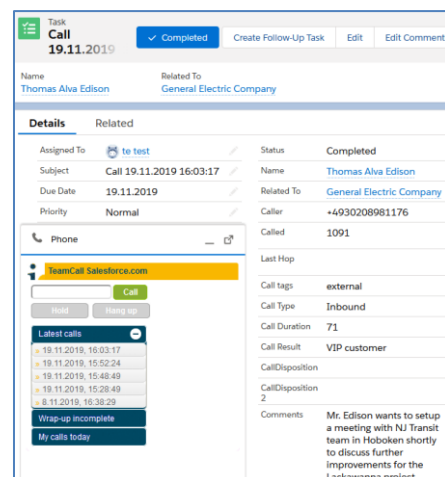
## Licensing

ilink TeamCall for Salesforce.com is available as a subscription-based per user license, distributed worldwide. For innovaphone, we offer two different license types with different CTI feature sets: *Basic* and *Standard*. For details, please see our webpage or ask for 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 custmizations. Please ask our Professional Services team for detailed pricing and further information (contact info see last page).

## Optional premium call features and integrations

### Prefix Dial

Your Salesforce.com users may work for different clients and utilize individual outbound call lines setup in your phone system. When a user makes an outbound call to a particular customer, he first has to manually type in a specific phone number *prefix (*e.g. *123) to get your client's individual calling line selected. With ilink's *Prefix Dial*, you perform this kind of outbound call easy and fast through the ilink softphone in Sales-force.com: the user just selects the prefix from a named picklist and then clicks Call.

### 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's 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 ilink softphone. The user just picks the label from the Speed Dial list and then uses click-and-dial. Speed Dial is included in the *Standard* licensing package.
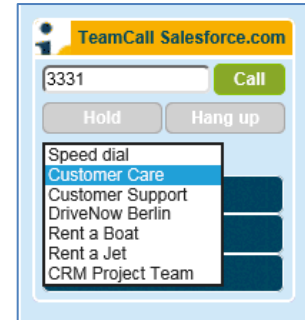
### NEW: Sales Cadence support (optional High Velocity Sales/HVS)

The ilink softphone now supports branched call steps de-fined in a Salesforce.com Lightning Sales Cadence. Just setup the proper wrap-up code ("Meaningful Connect") in the call wrap-up configuration. After a user has selected that wrap-up code for a related call in a Sales Cadence call step, the Cadence automatically processes the call result ("Yes") and then moves on. HVS support is included in *Standard* licensing.

### Case Creation with auto-prefill of calling data

In a case-oriented workflow (rather than tasks or events), a user first searches for a matching case in Salesforce after he has accepted an inbound service call. If he finds the matching case, he just edits it. But if the user cannot find a case or it's an unknown (new) customer, the Salesforce user has to manually create and edit a new case while he talks with his client.

Wouldn't it be smart if there's an automatic case-check and then an automatic new case creation, prefilled with all important, call related customer data? This optional feature displays a plain New Case creation screen if no case or customer has been found, auto-prefilled with a default (customizable) case subject. Addi-tionally, further customer specific Salesforce.com case data fields, e.g. priority, organization, source channel, sector and more are stored.
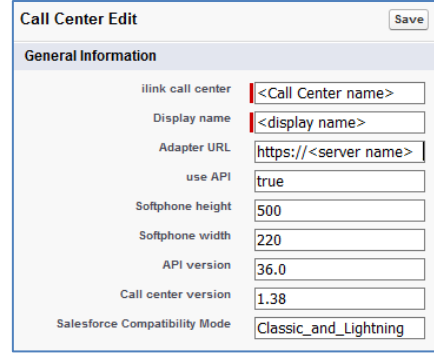
Furthermore, the new case creation features an automatic subject translation in order to use different subject word-ings for different caller languages/ localizations. The caller language is detected through the caller ID and a customi-zable inbound caller ID white list.
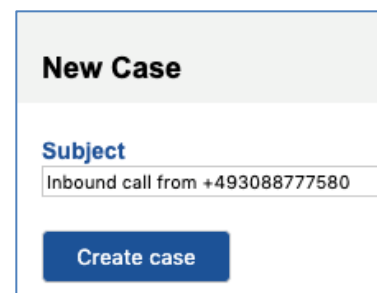
## Easy setup, fast rollout – no client software

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 softphone in the user browsers 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 | Save |
| --- | --- |
| **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
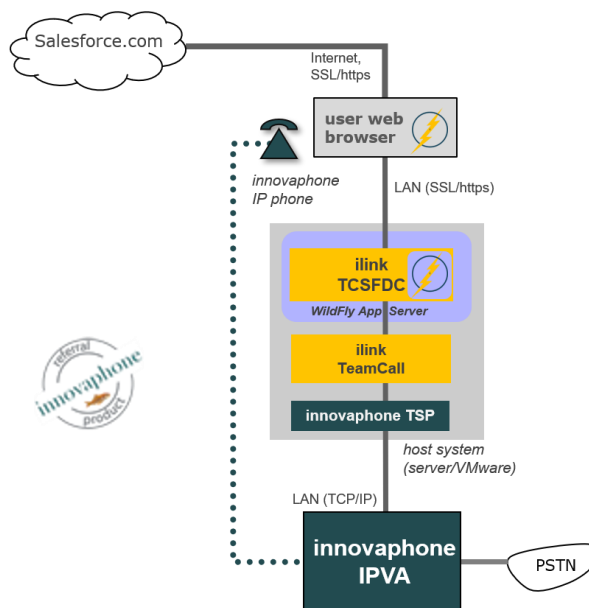
# About ilink

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
mail: sales@ilink.de
phone: +49-30-28526-0