



ilink TeamCall for Salesforce.com

*Lightning telephony workflow
for contact center*

Whitepaper 2020

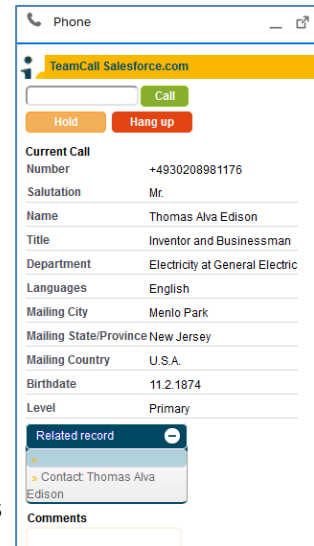


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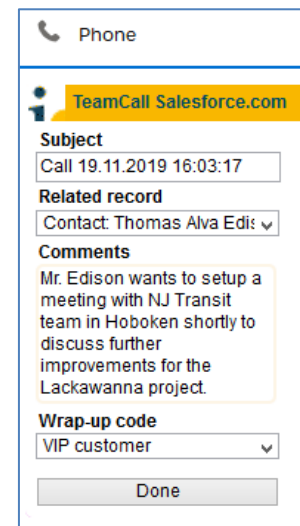
Overview

TeamCall for Salesforce.com (TCSFDC) is a softphone app which connects your Salesforce CRM with your phone system. It enables a Salesforce Call Center through the OpenCTI framework. TCSFDC provides an embedded softphone as well as fully integrated Salesforce call workflows. Assigned users control their familiar office phones with their Salesforce browser client and benefit from Lightning call workflows to automatically transfer and store valuable customer information during phone calls. Voice channels as well as customer call routings are still entirely handled by the customer phone system. Immediately recognize 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 softphone, you maximize the impact of your outbound call campaigns, streamline your inbound service call handling and enlarge your valuable customer database. TeamCall for Salesforce.com is a well established, secure and vendor independent connector for all leading phone systems. It is easy to setup and to manage at low cost.



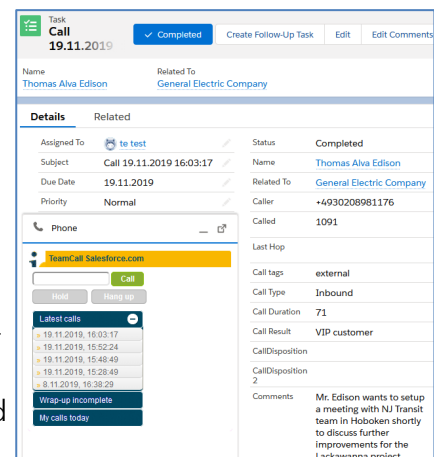
Softphone functions and call workflows

- ★ identify inbound calls and immediately see its associated contact, account, leads, cases and other Salesforce objects
 - ▶ customize your softphone information display
- ★ **NEW: IVR integration** for Avaya, Mitel and Unify systems
- ★ 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
- ★ optional premium call features: speed dial, prefix-dial, auto-prefill case creation, ACD agent and IVR integrations
- ★ save important customer information with your call task
- ★ phone call support for High Velocity Sales Cadence steps
- ★ classify your inbound and outbound calls - users choose from a picklist of 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 reporting statistics



Licensing

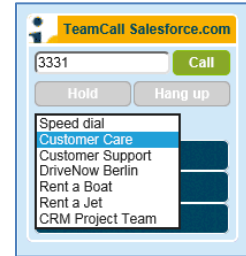
TeamCall for Salesforce.com is available as a subscription-based user license, distributed world-wide. We offer three license types with different feature sets: *Basic*, *Standard*, *Advanced*; support service and software updates are included! For details, see this [iLink website](#). iLink also offers optional Professional Services to accompany customers, partners and consultants upon demand, e.g. for larger, project-based CRM introductions, multisite enterprise rollout scenarios and individual customizations. Please ask our Professional Services team for detailed pricing and further information (contact info see last page).



Premium call features and optional system 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 select the client's individual calling line. With *Prefix Dial*, you perform this kind of outbound calls easy and fast through the iLink softphone in Salesforce: the user just selects the proper prefix from a picklist and then clicks "Call". Prefix Dial is an *Advanced* feature.

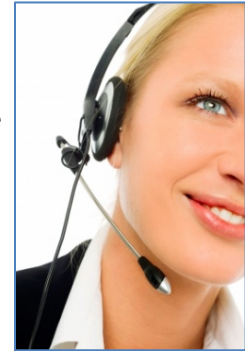


Speed Dial

If your Salesforce.com team has to dial common phone numbers quite often, it's very efficient for users to quickly and easily invoke these numbers to speed up dialing. Speed Dial offers an additional configuration for your Salesforce.com Call Center to setup a list of phone numbers with corresponding labels. The labels are displayed in an additional Speed Dial list in the iLink softphone. The user just picks the label from the Speed Dial list and uses click-and-dial. Speed Dial is included in the *Standard* licensing package.

Sales Cadence support (High Velocity Sales/HVS)

The iLink softphone supports branched call steps defined 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 saved that wrap-up code for a related call in a Sales Cadence call step, the Cadence automatically processes the call result ("Yes") and moves on. HVS support is included in *Standard* license package.



New Case Creation with auto-prefilling of calling data

In a case oriented workflow, a user manually searches Salesforce database after accepting an inbound call in order to find and edit the matching case. But if the user cannot find a case or it's a new customer, he has to manually create a new case while he talks with his customer. How about an automatic case check, combined with an automatic new case creation, pre-filled with all important, call related customer data? Well, this feature displays a plain new case creation screen if no case or customer has been found, auto-prefilled with a default (customizable) case subject. Additionally, other customer specific Salesforce case data fields, e.g. priority, organization, source channel, sector and others, are stored. Further-more, an automatic subject translation to use different subject wordings for different caller languages/localizations is also available: the caller language is detected through the caller ID setup in a customizable inbound caller ID white list. New Case Creation is a *Standard* feature.

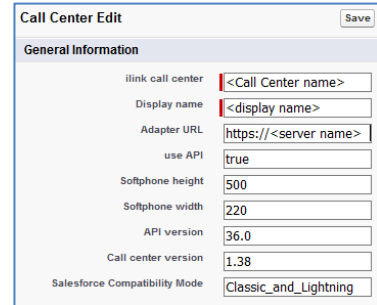
NEW: Interactive Voice Response (IVR) system integration

An IVR system records and stores important customer information before the call is routed to an available agent. If you are using an IVR, you might want your agents to use and store customer information from the IVR dialogue in your Salesforce CRM database as well. A customer ID or contract number provides a much more precise caller classification and display of the proper Salesforce object. In call wrap-up mode, the customer/contract ID is auto-saved in the call activity (task/event) in addition to other call related information. These IVR features are included in the *Advanced* licensing package (customizing required). Supported IVR systems: *Avaya AURA Contact Center (AACC)*, *Mitel MiContact Center Enterprise (MiCC-E)* *Unify OpenScape Contact Center (OSCC)* - other vendors/types upon request.



Easy setup, fast rollout – no client software

ilink TCSFDC is a server software solution, remotely installed by ilink Professional Services on a customer host system, either on-premises within his own IT infrastructure or on a preferred cloud platform. TCSFDC establishes a data link to the customer phone system utilizing a vendor proprietary API. The Salesforce administrator then just creates a Call Center which refers to the URL of the TCSFDC service and assigns users to the Call Center. The integrated softphone is automatically activated upon user login. In addition, the admin customizes wrap-up codes and sets up a Softphone Layout. The layout defines which objects Salesforce searches for inbound caller IDs and which data fields are displayed in the softphone for 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

Supported telephone systems

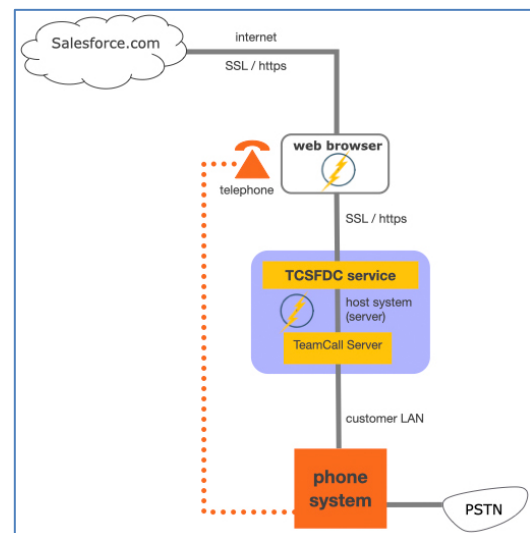
TCSFDC service connects to your phone system through ilink TeamCall Server which is included in the software. TeamCall uses its own protocol converters to adapt to major vendor CTI links through their proprietary protocols. Currently supported phone systems:

- ✓ Alcatel: OmniPCX Enterprise (OXE), OmniPCX Office (OXO), A4400, 4200, Office E
 - ✓ Avaya (Nortel, Tenovis Integral): AURA Communication Manger, IP Office, Integral series, CS1000
 - ✓ Cisco: Unified Communications Callmanager (CUCM)
 - ✓ Innovaphone IPVA
 - ✓ Mitel (Aastra, DeTeWe, Ericsson): MiVoice series Office 415/430/470/Business Phone, 5000, MX-ONE--100 series (104, 108, 112)
 - ✓ Panasonic KX series: NSX1000/2000, NCP, -NS, -TDA 100/ 200, -TDE 100/200
 - ✓ ShoreTel Unified Communications Platform
 - ✓ Telekom Octopus series: F X1/X3/X5/X8/XS, F 100/270 IT/470 UC/900, E30/930, Open, EP
 - ✓ Unify: OpenScope series Office LX/MX/HX, Business X1/X3/X5/X8/S, 4000, OpenScopeVoice (OSV)
- not listed? Get in touch with us!



Technical prerequisites to be provided by the customer

- compatible phone system (see above)
- OpenCTI supported Salesforce Editions: *Enterprise, Unlimited, Developer*
- user web browser: Firefox, Chrome, Internet Explorer (most recent version)
- host system/vmware (on-premises/cloud):
 - ▶ Windows Server 2012 (R2) / 2016 / 2019 Standard Ed. or Linux: SUSE SLES 12, Redhat RHEL 7, CentOS 7
 - ▶ 1 single-core CPU (Intel Xeon class) 3 GHz, 4 GB RAM, 20 GB HDD
 - ▶ network connection with routing to phone system and user browsers
- an SSL certificate





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 clients 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 30 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, and a Salesforce.com business partner for 15 years. You are welcome to contact our smart Professional Services team for further information about our Salesforce.com integration solutions!

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