Call Distribution based on Salesforce Data

● **Workflow**

Workflows like transfer call to contact or account owner. Last Agent routing based on call, e-mail or task

● **Smart IVR** (Interactive Voice Response)

If a case or contract number is typed into the IVR, the call can be distributed to the case or contract owner

● **Custom Objects**

Custom objects and custom fields are supported

● **Goal**

The caller will be directly transferred to the right person

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Lookup Data based on Salesforce Data

● **Personalize Greeting**

Search Name and language in Salesforce – *Hello Tom, nice to hear from you again*

● **Lookup data**

City, Country, Language, Service level agreement, Products ordered

● **Custom Objects**

Custom objects and custom fields are supported

● **Goal**

Personalize call experience, distribute call based on personal data

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Write Back Data to Salesforce

Create Task or Event

Phone System can create a task or an Event in Salesforce

Goal

Automatically create events or tasks for a Salesforce user

Use Cases

Create an appointment or callback request via IVR

Document an abandoned call in the customer activity and / or create a follow-up task

Display Data based on **IVR input** with CTI Data Connector

IVR input

Display any object like case or contract based on IVR input

Supported CTI solution

Requires CTI Data Connector for Salesforce

Custom Objects

Custom objects and custom fields are supported

Goal

Agent gets automatically the relevant data for the call

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Overview

Managed Package
Including license administration

Configuration
Call distribution logic configured in Salesforce

Call Distribution
Realtime data lookup in Salesforce

Mirage Cloud
Ireland
GDPR compliant

IVR
Display Salesforce data based on IVR input
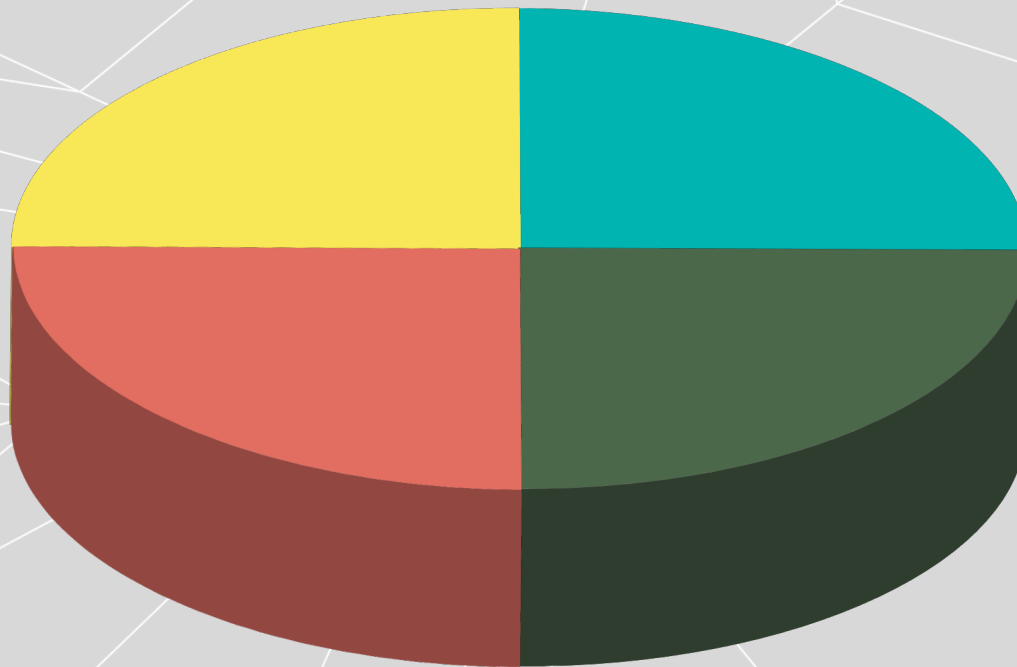
PBX
Any PBX supporting a Rest-API for call distribution

Additional Key Features
- Considers Omni-Channel presence state

Salesforce Platforms

L Lightning Experience
Sales and Service Cloud

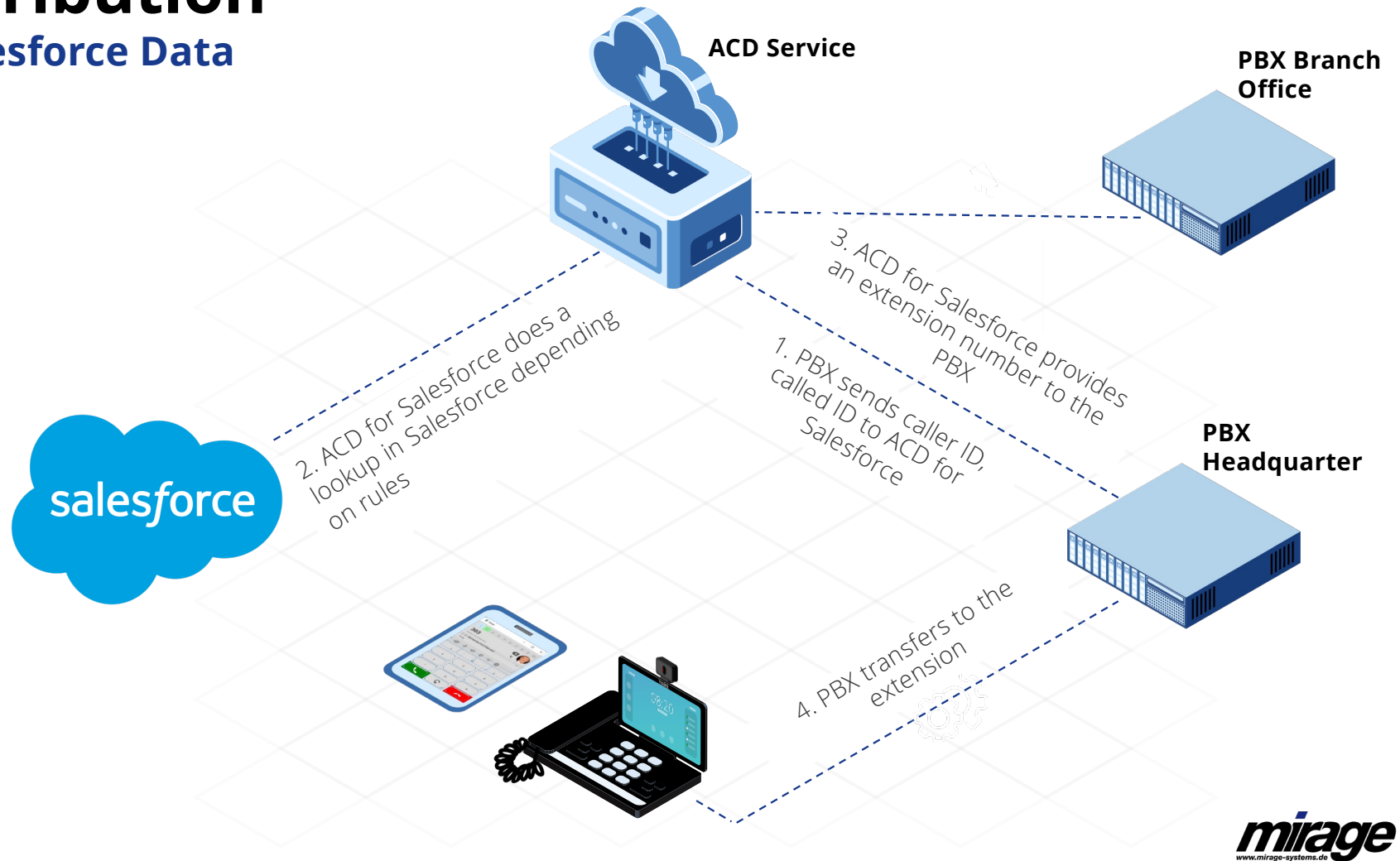**C** Classic
Sales and Service Cloud

O CTI-Solutions
Data lookup can be used without a CTI solution. IVR feature requires CTI Data Connector

OC Omni-Channel
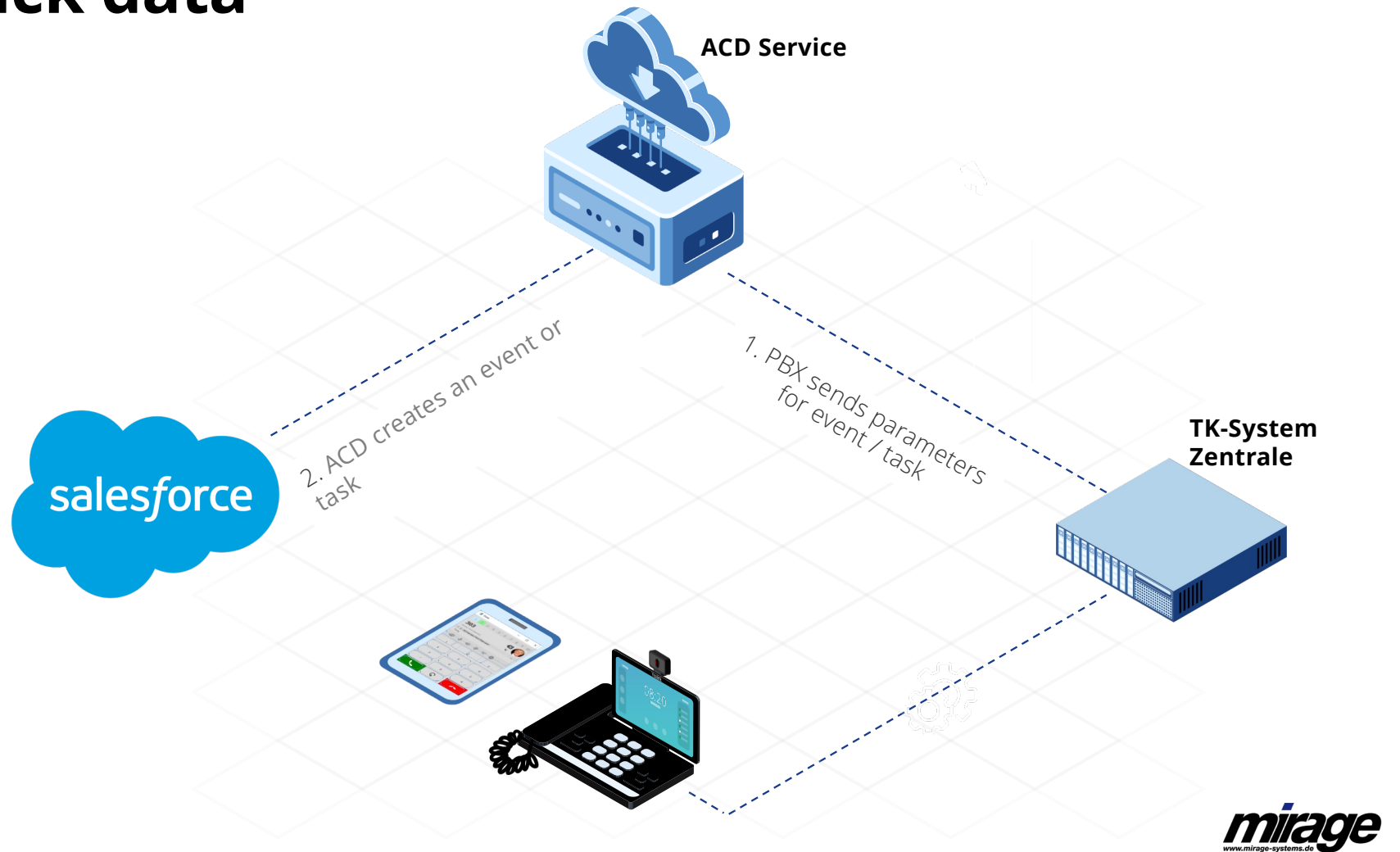Use presence state information for call distribution

Call Distribution

based on Salesforce Data

ACD Service

PBX Branch Office

2. ACD for Salesforce does a lookup in Salesforce depending on rules

3. ACD for Salesforce provides an extension number to the PBX

1. PBX sends caller ID, called ID to ACD for Salesforce

PBX Headquarter

salesforce

4. PBX transfers to the extension

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Write back data
to Salesforce

ACD Service

2. ACD creates an event or task

1. PBX sends parameters for event / task

TK-System Zentrale

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IVR with CTI Data Connector
Display data based on IVR input

ACD Service

PBX Branch Office

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salesforce

CTI Data Connector

Telefonnummer

2. CTI Data Connector retrieves IVR ID from ACD service

3. CTI Data Connector display the object (e.g. case) based on the IVR ID

1. PBX sends IVR data to ACD service

PBX Headquarter

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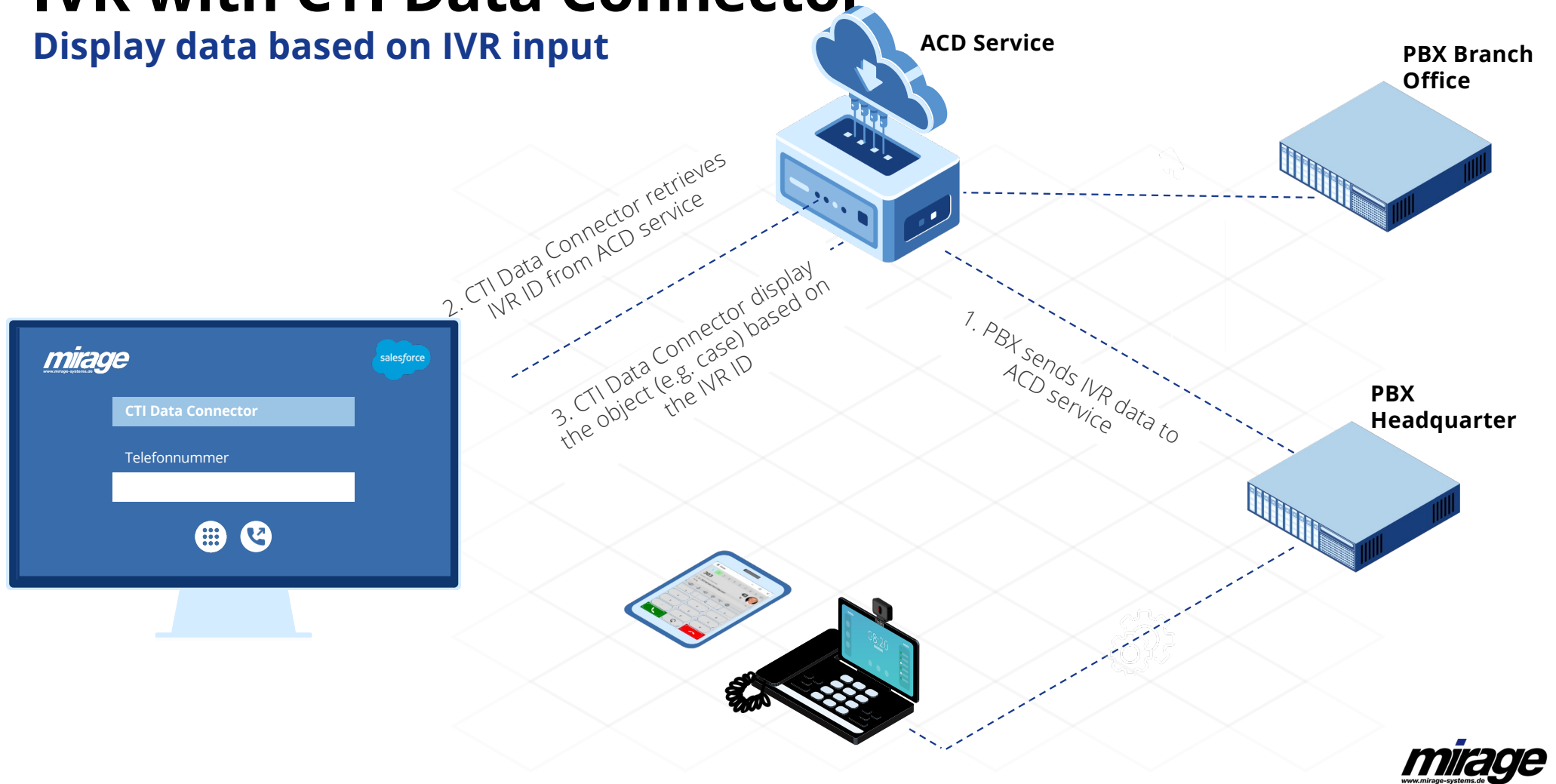
GoConnect Server
Call Distribution

ACD Service

GoConnect Server
On-Premise

PBX

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Additional desk phone required to which inbound
call is routed

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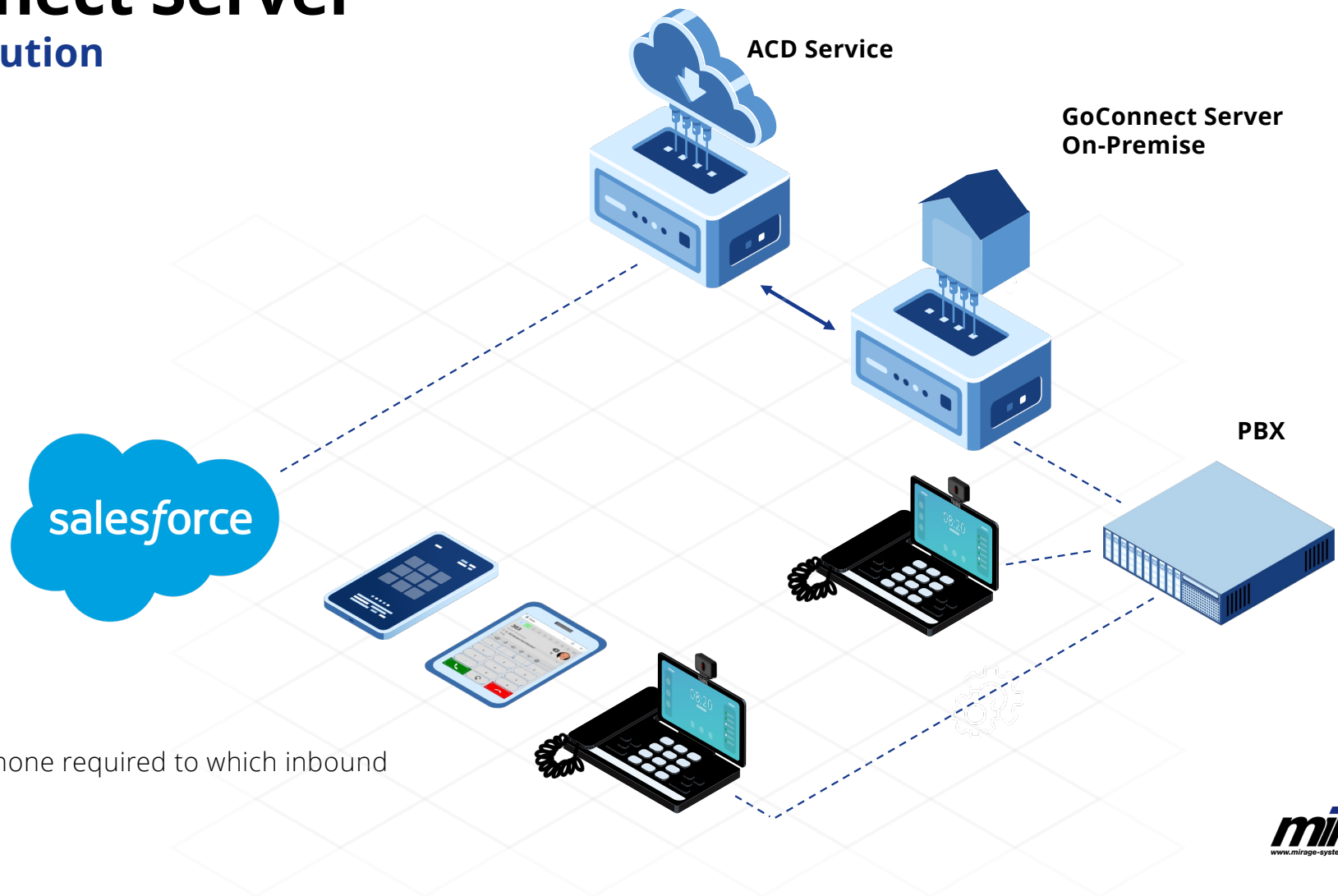
Cloud / On-Premise PBX
Unable to use a Web-Service

Mirage Cloud

ACD Service

Cloud / On-Premise PBX

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Additional desk phone required to which inbound call is routed

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