



CTI Data Connector for Salesforce

Any PBX - On-Premise, Cloud, MS-Teams

CTI Data Connector for Salesforce offers a computer telephony integration in Salesforce by keeping the **existing phone system** or **MS-Teams**. Alternatively, various **contact center** solutions are available. Suitable for all sizes of enterprises.

SALESFORCE INTEGRATION

- Works with **Lightning, Classic, Sales and Service Cloud**
- Start calls from Salesforce with **one click**
- **Caller identification** from accounts, contacts and leads as well as custom objects and custom phone number fields
- Automatically saves the **phone note** for each call as an activity – including additional information like **call result** (configurable picklist) and **call type** (incoming /outgoing) of the call
- **Call duration, ring time, on-hold time** and **total call time** allow a comprehensive analysis of the calls

- **Activity history** to access the latest phone calls and notifications about missed calls
- **Live Agent Dashboard** with Presence Status information and **Wallboard** with live view of current calls
- **Send SMS** with SMS template or via workflow
- The **Power Dialer** is a great tool to automate and organize calls. It is ideal for **Call Centers** by using group call campaigns, as well as for **sales** or **administration** by using personal call campaigns.
- **Automated workflow:** document unsuccessful outbound calls or missed calls as an activity
- Use **Salesforce reports** and **Dashboards** with all the inbuilt power of filtering and charts for call center reports
- **Latest technology:** Salesforce Open CTI
- No data is saved outside of Salesforce (GDPR-compliant)

Phone Call in Salesforce

CTI Data Connector

United Whiskey Distilleries Ltd

Alisa Meyer

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Department
Sales

Language
English

Mailing Country
United Kingdom

Phone Note

Outbound 15:04

Interested in CTI Data Connector for Salesforce. Cloud PBX. Send quote for 50 users.

CTI Data Connector

Outbound 15:04

Interested in CTI Data Connector for Salesforce. Cloud PBX. Send quote for 50 users.

All

Decision < 1 month

Create New...

Assign

Alisa Meyer

ACD license for 50 users

☐ Don't save

☒ Follow-up task

CONTACT CENTER ENHANCEMENT

- **Archiving** and **transcribing** audio files. Assignment of the voice recording to an account or contact in Salesforce
- **Automatic Call Distribution** for Salesforce - Call distribution based on Salesforce data

Wallboard

