



ipex chytrá firemní
komunikace

Sprinx Consulting

Salesforce CT Integration

How to make a phone call



Agenda

- Introduction
- Salesforce CT Integration app
- Application Features
- Environment setup
- Technical background
- References

- Q&A

Introduction

- **Sprinx Consulting**

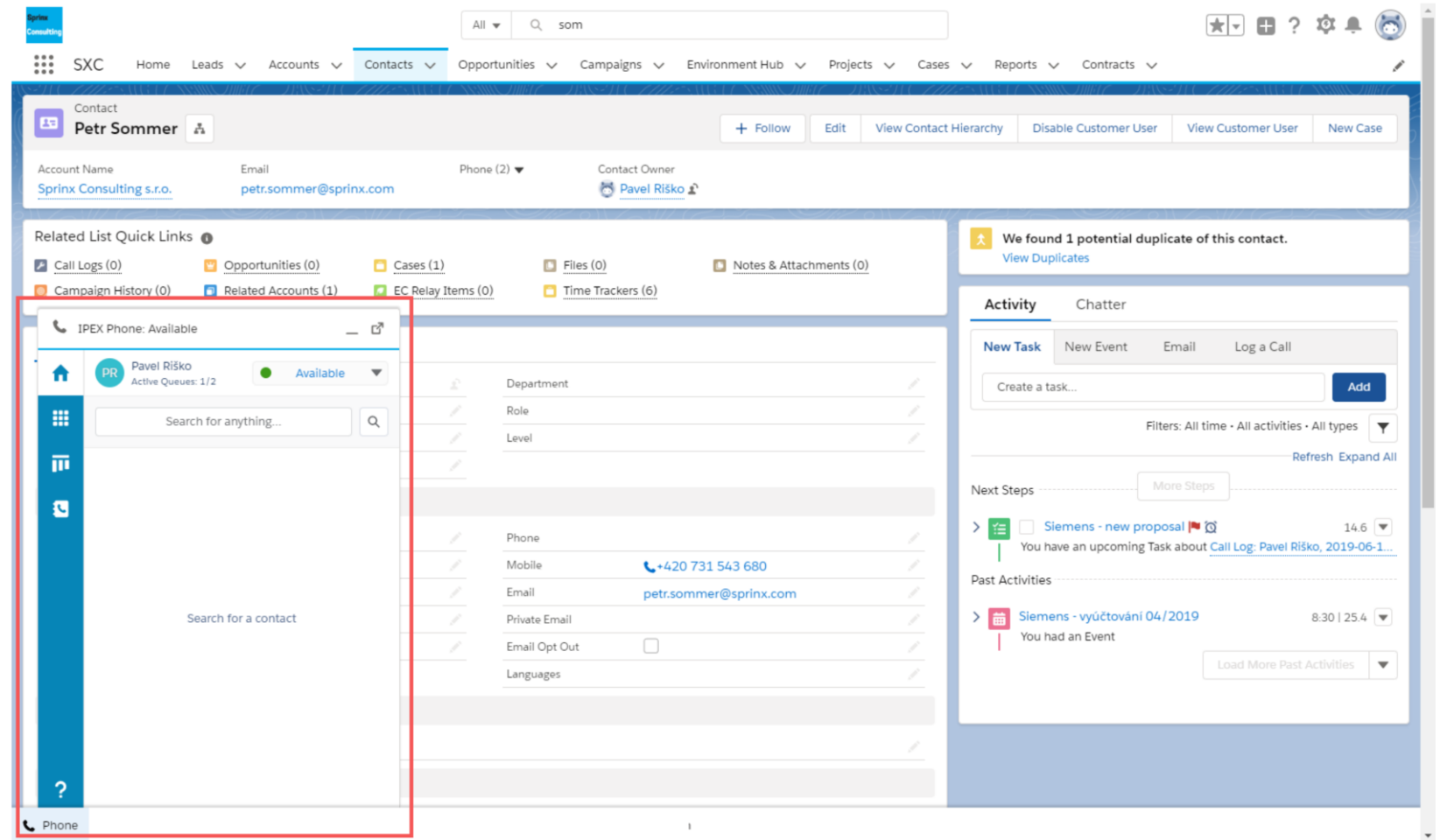
- Est. 2013
- Salesforce implementations, Software integrations
- ISV Partner, AppEx

- **IPEX**

- Est. 1992
- Regional and international telecommunications service provider

Salesforce CT Integration app

- Lightweight
- Always present
- Easy to use

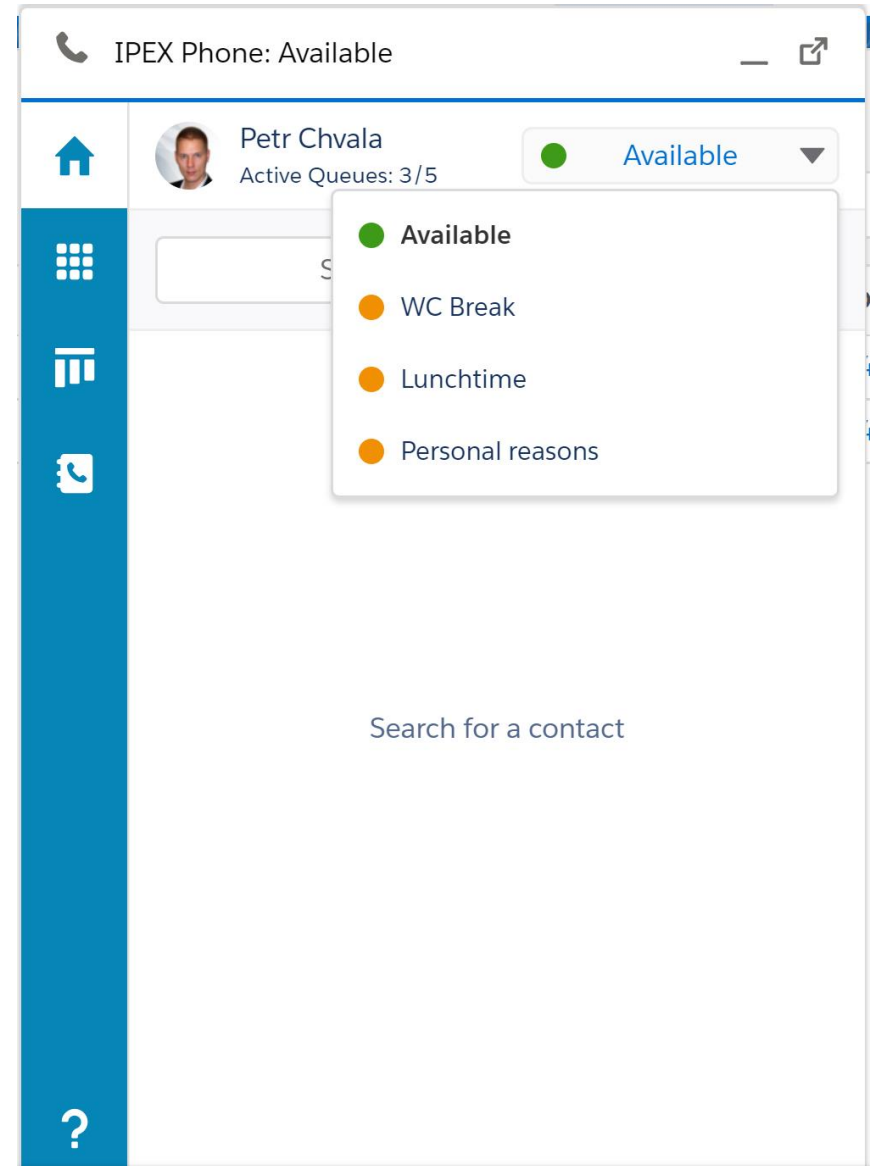


Application Features

- Agent Availability
- Calling
 - Outgoing Calls
 - Incoming Calls
 - On Call
- Inbound Queues
- Call Log tracking, Call History
- Call Recordings
- Task Creation

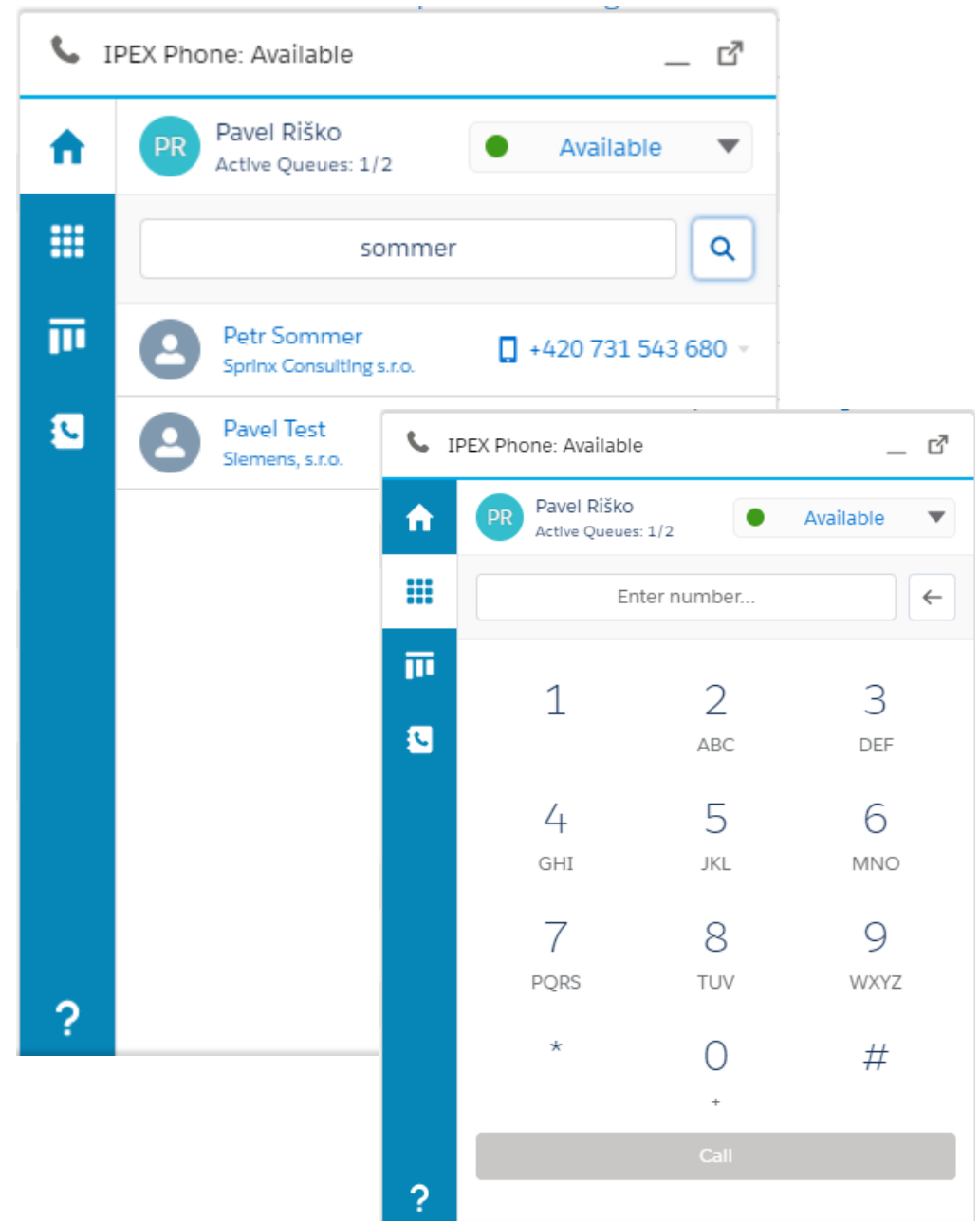
Agent Availability

- Available status
 - Inbound/Outbound calls allowed
- Breaks
 - Inbound/Outbound calls disabled



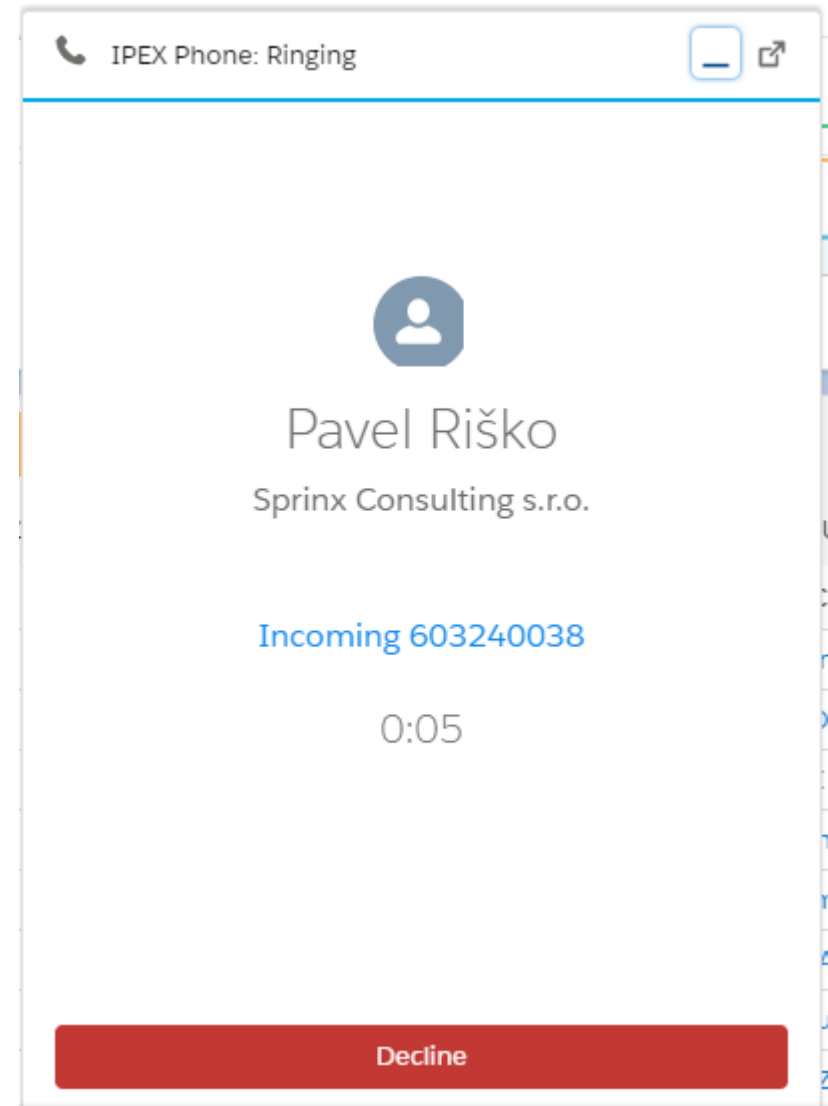
Outgoing Calls

- Click-to-call
- Contact / Lead Search (Fulltext)
- Dialpad
- Click-to-call
- External dial



Incomming Calls

- Contact/Lead matching
- Multi-match scenario
- Manual override



On Call

- Manage call
- Contact Details
- Browse call history
- Take notes
- Create tasks

The screenshot displays a mobile application interface. At the top, a status bar shows 'IPEX Phone: On Call' with a phone icon and a share icon. Below this is a blue header bar with a profile icon, the name 'Pavel Říško', the company 'Sprinx Consulting s.r.o.', and a timer '1:33'. A navigation bar below the header contains 'Call', 'Contact', and 'History' tabs, along with a list icon and a red 'X' icon. The main content area shows a text input field with the text 'Prepare new proposal for Siemens'. A 'New Task' modal form is open in the foreground. The form has a title 'New Task' and a section 'Task Information'. It includes fields for 'Assigned To' (Pavel Říško), 'Subject' (Siemens - new proposal), 'Due Date' (14.6.2019), 'Activity Type' (Quote), 'ExternalID', 'Activity Currency' (CZK - Czech Koruna), 'Comments', 'Related To' (Call Log: Pavel Říško, 2019-06-...), 'Name' (Petr Sommer), 'Reminder Set' (checked), 'Date' (14.6.2019), and 'Time' (14:30). At the bottom, there is an 'Additional Information' section with 'Status' (Not Started) and 'Priority' (High). The form ends with 'Save & New', 'Cancel', and 'Save' buttons.

IPEX Phone: On Call

Pavel Říško
Sprinx Consulting s.r.o. 1:33

Call Contact History

Prepare new proposal for Siemens

New Task

Task Information

* Assigned To: Pavel Říško

* Subject: Siemens - new proposal

Due Date: 14.6.2019

Activity Type: Quote

ExternalID:

* Activity Currency: CZK - Czech Koruna

Comments:

Related To: Call Log: Pavel Říško, 2019-06-...

Name: Petr Sommer

Reminder Set: ☒

Date: 14.6.2019 Time: 14:30

Additional Information

* Status: Not Started

* Priority: High

Save & New Cancel Save

Call Log Tracking

- Every call is logged
- History tracking
 - User call history
 - Record related history
- Access recordings
- Fully Reportable

Call Logs (6+)			
NAME	DIRECTION	DURATION (S)	PHONE
777771679999, 201...	Outgoing	53	+420 545 566 648
777771672, 2019-0...	Outgoing	13	+420 245 124 648
View All			

IPEX Phone: Available

PR Pavel Riško
Active Queues: 1/2

Available

CALL HISTORY

Ladislav Pravda
10.6.2019 12:13:56 (41s)

✓

Pavel Riško
10.6.2019 12:05:14 (129s)

✓

Pavel Riško
9.6.2019 13:25:39 (0s)

✓

Pavel Riško
29.5.2019 9:20:31 (0s)

✓

Pavel Riško
29.5.2019 9:19:49 (0s)

✓

Petr Vitouš
29.5.2019 9:19:37 (0s)

✓

Pavel Riško
29.5.2019 9:19:10 (0s)

✓

Pavel Riško
29.5.2019 9:16:33 (0s)

✓

Pavel Riško
23.5.2019 15:17:00 (0s)

✓

Pavel Riško
23.5.2019 15:14:35 (0s)

✓

Inbound Queues

- Controls which calls can be routed in
- Defined once on call center level
- Simple subscription per agent
- Automatic sign-off if user unavailable

The screenshot displays the IPEX Phone interface for agent Petr Chvala. At the top, the status is 'IPEX Phone: Available'. Below this, the agent's name and 'Active Queues: 3/5' are shown next to a green status indicator and a dropdown menu set to 'Available'. A section titled 'AVAILABLE QUEUES' lists five categories with toggle switches:

Queue Category	Status
General	Active
Product Support	Active
Technical Support	Active
Legal	Inactive
Billing	Inactive

A blue sidebar on the left contains navigation icons: a home icon, a grid icon, a list icon, a phone icon, and a question mark icon at the bottom.

Environment Setup

- Easy Installation
 - 1. Install package
 - 2. Enter login details
 - 3. Configure Call Center
 - 4. Add phone utility item into app
- Manage Call Center users

IPEX Configuration

IPEX Configuration Detail

[Edit](#)[Delete](#)[Clone](#)

SETUP

Call Centers

▼ Modules

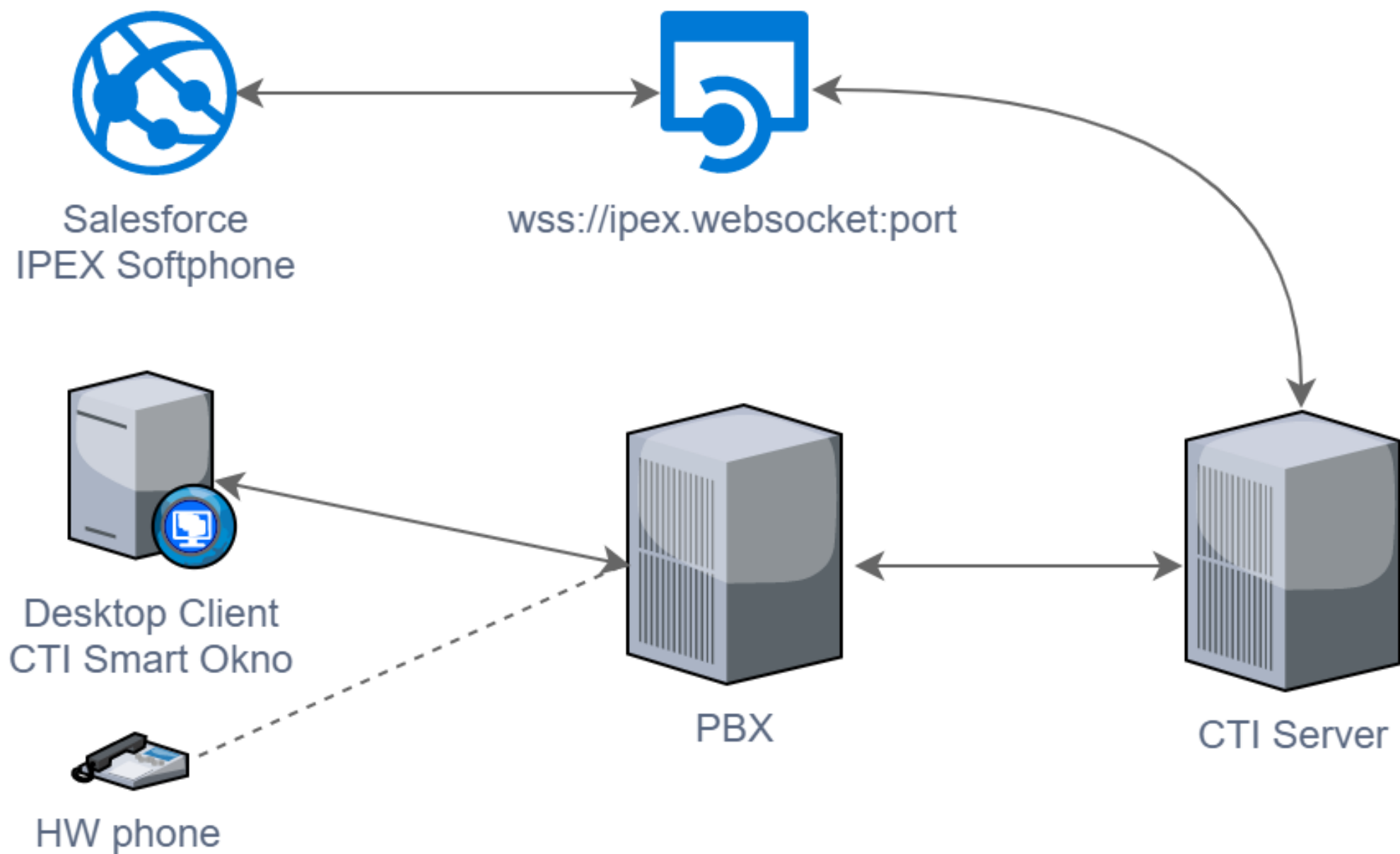
Say Hello to Salesforce Call Center

[Help for this Page](#) ?

Connect your telephony system to Salesforce and boost user productivity by showing related Salesforce information for every incoming call. Dial numbers directly from Salesforce and report on call outcome, duration, and more.

Technical Background

- Technologies:
 - Built using **Lightning Component Framework**
 - Using **Salesforce Open CTI**
 - Using **Websocket** signaling
 - Using standard **Salesforce Call Center / Phone** configuration
- Support for **Software** and **Hardware phones**



References



Q&A

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