Automatic Call Distribution for Salesforce
**Call Distribution** based on Salesforce Data

- **Workflow**
  Workflows like transfer call to contact or account owner

- **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
 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
Display Data based on **IVR input**

- **IVR input**
  Display any object like case or contract based on IVR input

- **Custom Objects**
  Custom objects and custom fields are supported

- **Supported CTI solution**
  Requires CTI Data Connector for Salesforce

- **Goal**
  Agent gets automatically the relevant data for the call
Overview

Additional Key Features
• Considers Omni-Channel presence state
Salesforce Platforms

- **Lightning Experience**: Sales and Service Cloud
- **CTI Solutions**: Data lookup can be used without a CTI solution. IVR feature requires CTI Data Connector
- **Classic**: Sales and Service Cloud
- **Omni-Channel**: Use presence state information for call distribution
Call Distribution based on Salesforce Data

- PBX sends caller ID, called ID to ACD for Salesforce
- ACD for Salesforce does a lookup in Salesforce depending on rules
- ACD for Salesforce provides an extension number to the PBX
- PBX calls the final extension
Display Data based on **IVR input**

- PBX sends IVR input to ACD service
- CTI Data Connector retrieves IVR ID from ACD service
- CTI Data Connector display the object (e.g. case) based on the IVR ID
GoConnect Server Call Distribution

- Deskphone / SoftPhone required to which inbound call is directed
- GoConnect Server sends Caller ID / Called ID to ACD Service
- ACD for Salesforce does a lookup in Salesforce depending on rules
- ACD for Salesforce provides an extension number to the GoConnect Server
- GoConnect Server initiates a call transfer via deskphone to the retrieved extension number
Cloud or On-Premise PBX unable to use a WebService

- **Specific deskphone** required (uaCSTA option - Snom, Yealink) to which inbound call is routed
- ACD for Salesforce does a lookup in Salesforce depending on rules
- ACD for Salesforce provides an extension number to the PBX
- Mirage Cloud initiates a call transfer via deskphone to the retrieved extension number