**The Benefits of Telephony in Salesforce**

ability to know which of your customers is calling before you pick up the phone. You can instantly get a profile screen showing their customer information or the account record of the caller.

It also makes outgoing calls so much easier. Gone are the days of having to find a customer phone number, enter the number on your phone (including the dial-out), then dial. With integrated telephony, simply turn every phone number inside Salesforce into a clickable link.

having any notes you take during a call automatically logged and associated with objects like contact records, cases, or anything you create. This is great for both inbound and outbound calls, especially where they need to be reported on.

Most importantly, it’s no different from your normal phone system. Make outgoing calls, put them on hold, transfer to another agent, or add people for a conference call – all without *ever* leaving the Service Cloud console.

<https://www.apexhours.com/salesforce-cti-integration/>

A diagram of a telephone system

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Yes, to integrate telephony with Salesforce, you typically need to subscribe to a telephony service provider that offers integration capabilities with Salesforce. While some basic telephony features may be available in Salesforce out-of-the-box, such as click-to-dial functionality using softphones, more advanced features like call logging, screen pops, call routing, and comprehensive call center management usually require a dedicated telephony solution.

Here are the key components you may need to purchase or subscribe to for telephony integration with Salesforce:

1. **Telephony Service Provider**: You'll need to select a telephony service provider that offers integration with Salesforce. This provider will handle the infrastructure for making and receiving calls, as well as providing features like call routing, IVR, call recording, etc. Examples of such providers include Twilio, RingCentral, Vonage, Five9, and others.
2. **Telephony Integration App**: Many telephony providers offer managed packages or apps on the Salesforce AppExchange that facilitate seamless integration between their telephony platform and Salesforce. These apps typically provide pre-built connectors, APIs, and configurations to enable features like call logging, screen pops, click-to-dial, etc.
3. **Subscriptions or Licenses**: You'll need to subscribe to the telephony service and potentially purchase licenses or subscriptions for your users based on the required features and usage levels. Some providers offer flexible pricing plans based on the number of users, minutes, or specific features you need.
4. **Optional Add-ons**: Depending on your requirements, you may need to purchase additional add-ons or features offered by the telephony provider, such as advanced call analytics, call recording storage, integration with third-party CRM systems, etc.
5. **Salesforce Licenses**: Ensure that your Salesforce org has the necessary licenses and permissions to install and use the telephony integration app from the Salesforce AppExchange. Different Salesforce editions and license types may have limitations on the number of apps and custom integrations you can install.
6. **Implementation Services**: Depending on the complexity of the telephony integration and your organization's requirements, you may need to engage implementation services from the telephony provider or a certified Salesforce consulting partner to assist with setup, configuration, customization, and training.

**Go with open cti or managed package**

**CTI (Computer Telephony Integration) in Salesforce**

**Enhancing Communication and Productivity**

CTI integration enables seamless communication between telephony systems (such as PBX systems or cloud-based telephony providers) and Salesforce, allowing organizations to manage and track customer interactions directly within the Salesforce platform.

**Types of CTI integration:**

1. Open CTI (Open Computer Telephony Integration)
2. Salesforce CRM Call Center
3. Custom CTI Integrations
4. Managed Package Integrations

**1.Open CTI (Open Computer Telephony Integration)**:

* 1. Open CTI is a flexible, standards-based framework provided by Salesforce for integrating telephony systems with Salesforce.
  2. It allows developers to build custom CTI integrations using web technologies like JavaScript, HTML, and CSS.
  3. Open CTI supports integration with a wide range of telephony systems, including on-premises PBX systems, cloud-based telephony providers, and custom-built solutions.
  4. Developers can use the Salesforce CTI Toolkit to create custom softphone controls, call logging interfaces, screen pops, and other telephony features within Salesforce.
  5. It is a cost-effective solution as it doesn't require additional licensing fees, and it provides flexibility for customization and development.

**2.Salesforce CRM Call Center**:

* 1. Salesforce CRM Call Center is a built-in feature of Salesforce that allows organizations to set up and manage call centers directly within the Salesforce platform.
  2. It provides pre-built integrations with select telephony service providers, enabling seamless integration with Salesforce out-of-the-box.
  3. Salesforce CRM Call Center offers features such as click-to-dial, inbound call routing, screen pops, call logging, call queues, and real-time call monitoring.
  4. Organizations can configure call center settings, call routing rules, and agent availability directly within Salesforce Setup.

**3.Custom CTI Integrations**:

* 1. Custom CTI integrations involve building bespoke telephony integrations tailored to the specific needs of an organization.
  2. Developers can leverage Salesforce APIs (such as REST API, SOAP API) and third-party telephony APIs to create custom CTI solutions.
  3. Custom CTI integrations offer flexibility and control over the integration process, allowing organizations to implement telephony features and workflows that are unique to their business requirements.
  4. These integrations often involve building custom softphone controls, call logging mechanisms, screen pop handlers, and other telephony functionalities using Salesforce development tools (such as Apex, Visualforce, Lightning Web Components).

**4.Managed Package Integrations**:

* 1. Managed packages available on the Salesforce AppExchange provide pre-built CTI integrations with popular telephony service providers.
  2. These packages typically offer ready-to-use CTI solutions that can be easily installed and configured in Salesforce orgs.
  3. Managed package integrations may offer features such as click-to-dial, call logging, screen pops, call center dashboards, and integration with Salesforce data.
  4. Organizations can choose from a variety of managed packages based on their telephony requirements, budget, and scalability needs.
  5. Pay attention to user reviews, ratings, and customer feedback to assess the reliability and suitability of the managed package for your organization's needs.

**CTI Integration Process:**

* Telephony Service Provider selection
* Connected App creation in Salesforce.
* Authentication with the telephony provider's API
* Building custom CTI components or using pre-built solutions
* Testing and deployment

**Features Supported by CTI:**

**1.Click-to-Dial Functionality:**

Users can initiate outbound calls directly from within Salesforce by clicking on phone numbers within records.

**2.Inbound Call Handling:**

call received by an agent, showcases customer related information based on phone number.

**3.Call Logging and Activity Tracking:**

call duration, call outcomes, and any notes entered by the agent during the call are recorded.

**4.Screen Pop on Incoming Calls:**

The screen pop feature dynamically displays the caller's information in a pop-up window when an incoming call is received.

**5.Call Transfer and Conference:**

Showcase the ability to transfer calls to other agents or departments directly from within Salesforce. Optionally, demonstrate conference calling functionality if supported by the CTI integration.

**6.Call Center Dashboard:**

which displays real-time metrics such as call volume, agent availability, average wait time, etc.

**Benefits of CTI Integrations in Salesforce:**

* Enhanced Communication and Collaboration
* Improved Customer Service and Support
* Streamlined Business Processes and Workflows
* Increased Productivity and Efficiency
* Real-time Insights and Analytics

Steps from video to configure app:

Install open CTI package

You will see call center in that add service provdider url and asigin user if needed

Create lightning app cti agent icon and select profiels and also select which apps all need there and add phone utility checkbox enable

Save

Output in app under bottom of page phone icon will be visible so you can make incoming outgoing notes transfer call

A screenshot of a computer

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<https://calltrackingmetrics.zendesk.com/hc/en-us/articles/6154670255629-Configuring-Call-Center-and-Open-CTI-Softphone-Salesforce-Lightning#:~:text=Navigate%20to%20the%20Setup%20page,Click%20Import>.

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<https://www.slideshare.net/Steady455/salesforce-avaya-cintegration-overview>

AVAYA:

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A screenshot of a call center

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A screenshot of a phone call

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* Users can sync contacts, events, tasks, and emails between Salesforce and Outlook.
* Provides features such as email tracking, calendar sync, and contact synchronization.

A screenshot of a phone

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1. **Seamless Email Integration**:
   * Salesforce App for Outlook allows users to view, manage, and update Salesforce records directly within Outlook.
   * Email tracking: Track email opens, clicks, and responses directly within Salesforce, enabling better follow-up and engagement tracking.
2. **Calendar Sync**:
   * Sync Salesforce events with Outlook calendars and vice versa, ensuring that users have a unified view of their schedules.
   * Enable users to create, update, and manage Salesforce events directly from Outlook.
3. **Contact and Lead Management**:
   * Bi-directional sync of contacts and leads between Salesforce and Outlook ensures that contact information remains up-to-date across platforms.
   * Enable users to create Salesforce contacts and leads directly from Outlook, streamlining data entry and reducing duplicate records.
4. **Document Collaboration**:
   * Salesforce Files Connect for OneDrive for Business and SharePoint allows users to access and collaborate on Office documents directly within Salesforce.
   * Enable seamless sharing and collaboration on documents stored in Office 365, enhancing teamwork and productivity.
5. **Data Integration and Insights**:
   * Salesforce Einstein Analytics Integration with Power BI enables users to embed Power BI dashboards and reports directly within Salesforce.
   * Leverage Power BI's advanced analytics and visualization capabilities to gain insights from Salesforce data, helping users make informed decisions.
6. **Enhanced Communication and Collaboration**:
   * Integration with Microsoft Teams allows users to access Salesforce data and actions directly within Teams channels.
   * Streamline communication and collaboration by bringing together Salesforce and Teams functionalities in one platform.
7. **Mobile Productivity**:
   * Salesforce Mobile App integration with Office Mobile Apps enables users to access and edit Office documents directly within the Salesforce mobile app.
   * Empower users to work on Office documents while on the go, ensuring productivity and flexibility.
8. **Workflow Automation**:
   * Automate repetitive tasks and streamline business processes by integrating Salesforce and Office 365 with workflow automation tools like Microsoft Power Automate.
   * Trigger actions and updates in Salesforce based on events in Office 365 applications, improving efficiency and reducing manual effort.

* Users can sync contacts, events, tasks, and emails between Salesforce and Outlook.
* Provides features such as email tracking, calendar sync, and contact synchronization.