SalesForce - Introduction

The jtel ACD can be integrated with SalesForce using the jtel SalesForce connector, and by implementing the corresponding REST API endpoints in SalesForce.

The following functionality is available:

- Automatic search and screen pop of records in SalesForce.
- Click to Dial from any record in SalesForce.
    - Verification of the request, and changing the signalled outbound calling number can be performed using a REST API.
- On an incoming call, the corresponding record in SalesForce (Lead, Contact ...) can be searched for in the IVR using a REST API in SalesForce.
    - The information found can be used to influence the routing in the IVR and ACD.
    - Automatic or manual screen pop of records is provided.
    - Recording of the SalesForce record Id in the jtel statistics database is provided.
- Passing of statistics from the ACD to SalesForce, to allow updating of activities in the corresponding record in SalesForce.