360 CTI APP

360 CTI: User Guide (International)

360 DEGREE CLOUD TECHNOLOGIES PVT. LTD.

Contents

No table of contents entries found.

User Guide

What is CTI

This guide reflects 360 CTI functionality through release v2.106. If your org is on an earlier version, some screens, fields, or options described here may not be available yet.

360 CTI is a Computer Telephony Integration application that is built on the Salesforce platform and is 100% native to Salesforce. It enables users to integrate their telephone systems with Salesforce, allowing them to manage calls and customer interactions directly from their Salesforce environment.

Outbound Calls

Ways to initiate Outbound calls

To make an outgoing call, there are several ways you can do it.

a. **Dialpad**- You can go to the Dialpad of your SoftPhone and dial the number that you would like to call.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

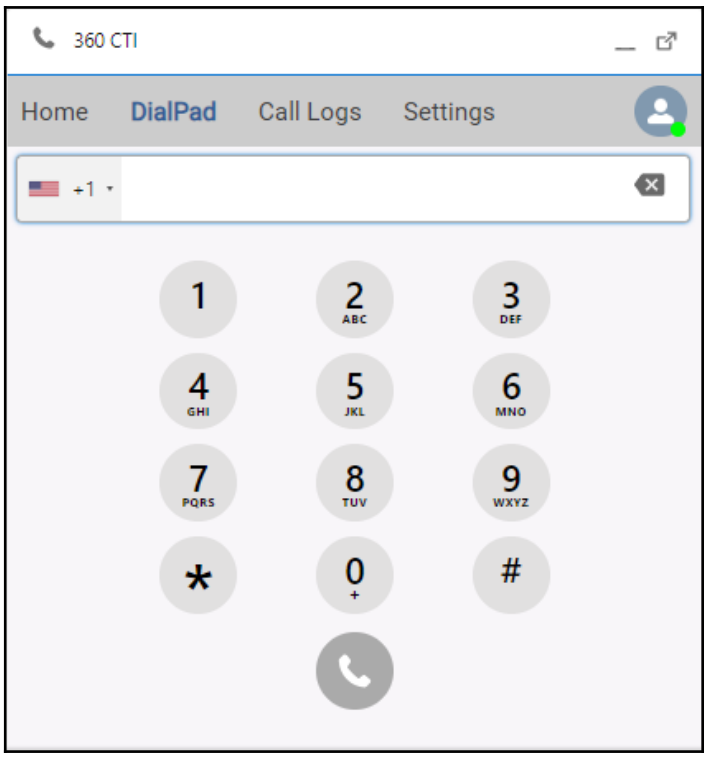


Fig 1: Call through dialpad

b. **Call Log records-** The option of call log lets you access recent calls and also allows you to make a call.

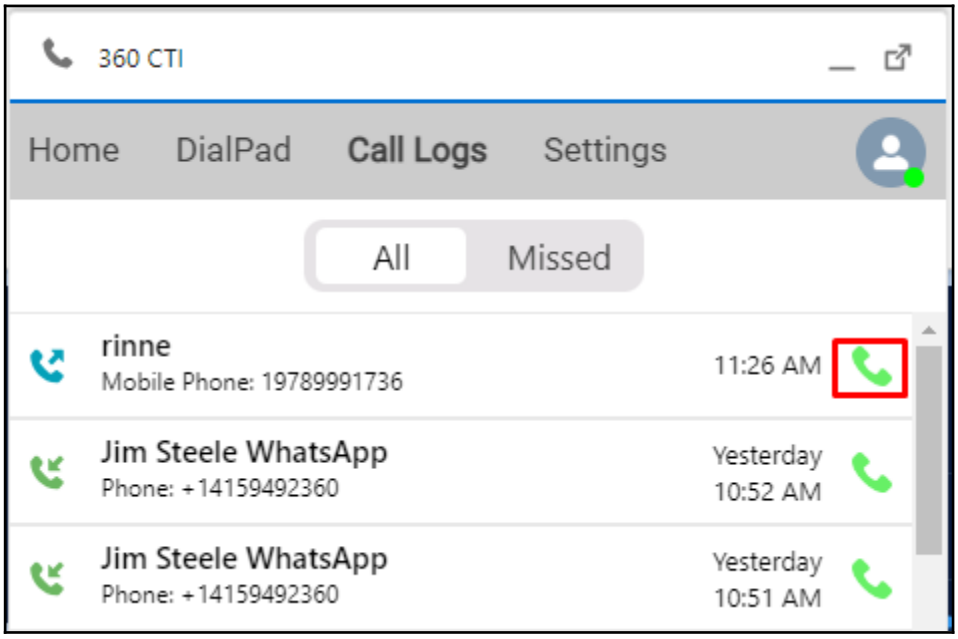


Fig 2: Call through call logs

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

c. **Click to dial-** Navigate to the desired record. You can access “Click to Dial” component and click on the number to dial as shown in the image below.

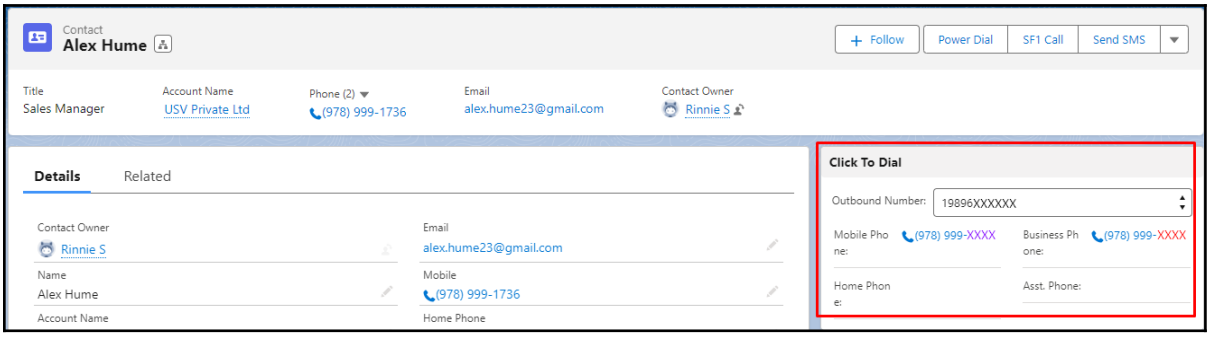


Fig 3: Click to dial

Call Stages

When you make a call through CTI, you’ll see three different stages on the screen: Connecting and Disconnected.

- **Connecting a call:**
  The display shows **"Connecting"** as the call is being connected to the agent’s system.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

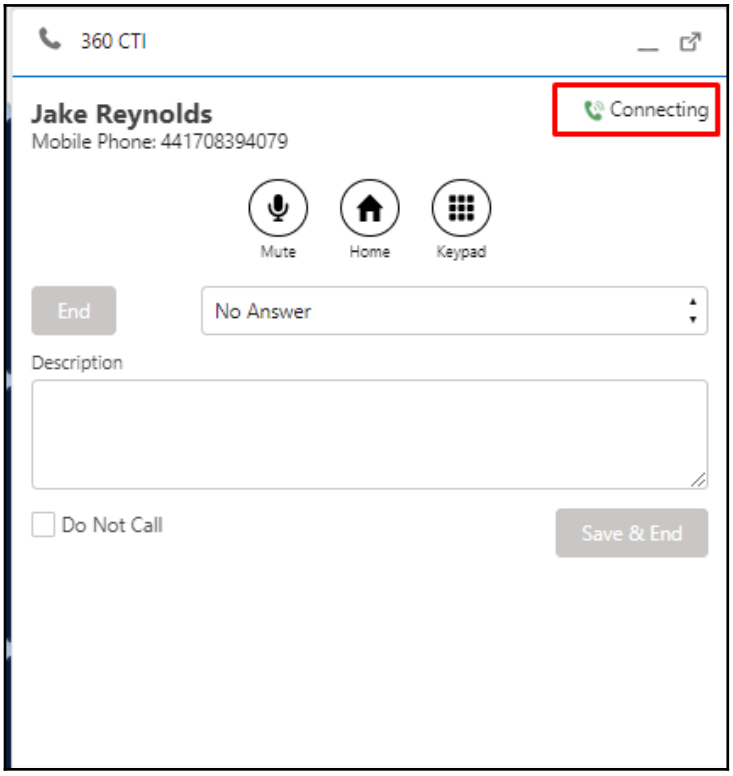


Fig 4: Call "Connecting" to Agent's system

- **Call Connected -** The display shows **"Connected"** as the call is connected to the agent's system (as shown in figure):

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

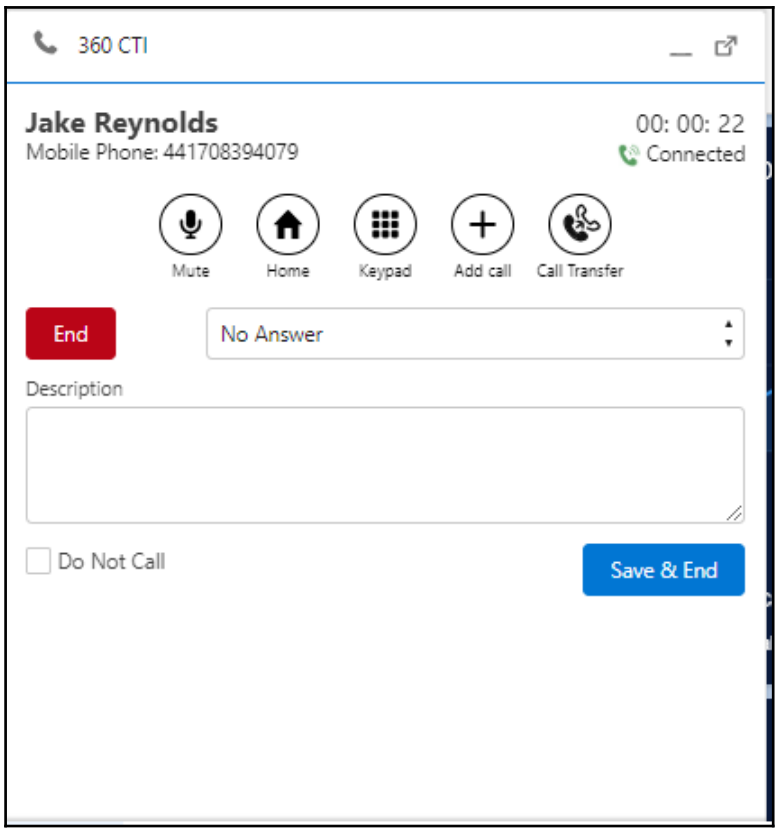


Fig 5: Call is picked up from another side

- **Disconnecting a call:**
  When a call is **Disconnected**, below screen will be displayed.

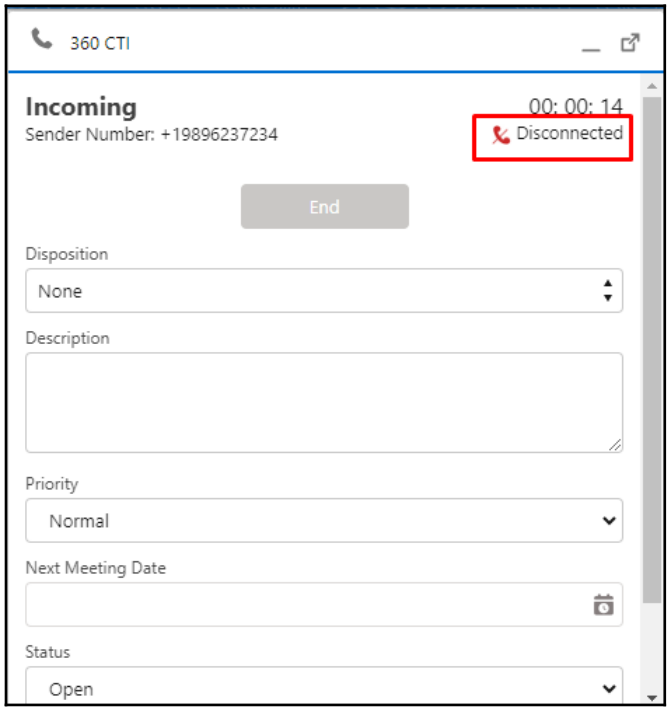


Fig 6: Call "Disconnected"

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Incoming Call – Record Association Override

When an incoming call comes from a number that matches more than one record (for example a Lead and a Contact), a dropdown appears next to the caller's name on the Softphone. Opening it lists every matching record so the agent can choose which one the call should be associated with. The records listed come from the objects configured on the CTI Object Setup page.

Note : this override is available for incoming calls only.

User profile Status

The user has a status indicator in 360 CTI SoftPhone that shows whether they are currently Online, Away and Offline.

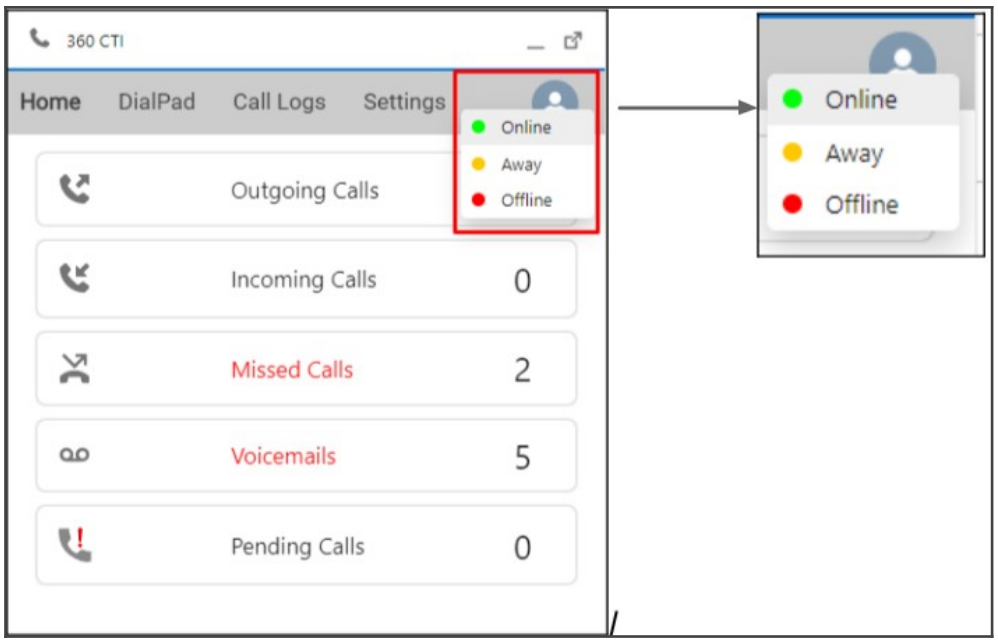


Fig 7: User status

- **Away Suboption-** Specify the sub-option in General Settings by entering it in a format separated by commas.



Fig:8 Away Suboption

- **Offline Suboption-** Input the "Offline" sub-option using a comma-separated format in General Settings.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

- **Mark Offline on Session Expiry-** If a user logs out of Salesforce without first setting their CTI status to Offline, this setting automatically marks them Offline after the interval chosen in Select Schedule Time. Configure it in General Settings — see SF1 Mobile App Calling in the General Settings section below.



Fig:9 Offline Suboption

CTI Setup

Note : 360 CTI is moving its setup screens from the earlier Visualforce-based interface to a new Lightning Web Component (LWC) interface. The new interface is labeled CTI Setup; the previous one is now labeled CTI Setup Classic. Field names and functionality are unchanged — only the look and navigation differ slightly. This guide reflects the current (LWC) interface.

User Config Tab

In this User can see the assigned numbers and other details as shown in below figure:

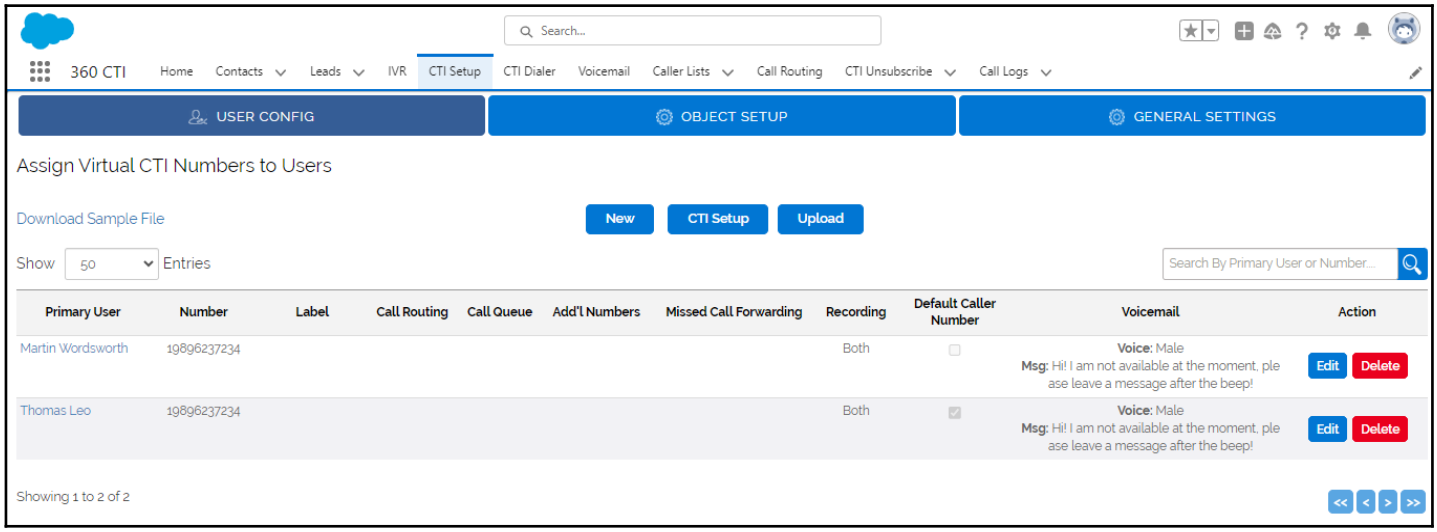


Fig:10 User Config

When users click on the "New" button, they are presented with the following options:

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

- **Show Numbers-** Use this picklist at the top right of the User Config table to filter by All, Assigned, or Unassigned numbers.

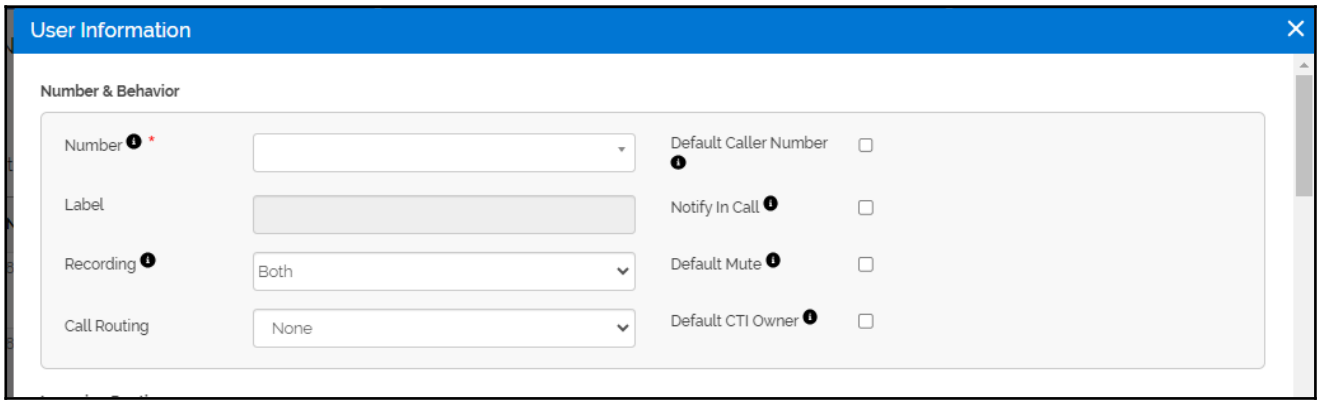


Fig:11 Number & Behavior in User Config

Number & Behavior

- **Number**- The number being configured.
- **Default Caller Number-** This checkbox enables the user to set the respective number as the default calling number. However, this feature will not work if a sticky caller is defined. In such cases, the user's default number is determined by the value in the User.Phone field when Sticky_Caller is defined.
- **Label**- Users can also manually assign labels to identify numbers, especially when dealing with multiple numbers. For instance, if a user has 10 numbers, they can label them based on the channels they use, such as WhatsApp, SMS, and so on. This helps them easily distinguish between the numbers.
- **Notify In Call-** Alert the user about an incoming call even when they are already engaged in a call.
- **Recordings-** Records the audio during calls based on the Call Type, which can be set to Incoming calls only, Outgoing calls only, or Both incoming and outgoing calls.
- **Default Mute-** Automatically mute the call when received.
- **Call Routing-** Select the Call Routing for whom you wish to route the call.For more information, please refer to the Call Routing section in this document
- **Default CTI Owner-** Check this field if the corresponding CTI number is assigned to multiple users, and if there is no "Last Communicator," the incoming call will ring for the respective user.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Incoming Routing

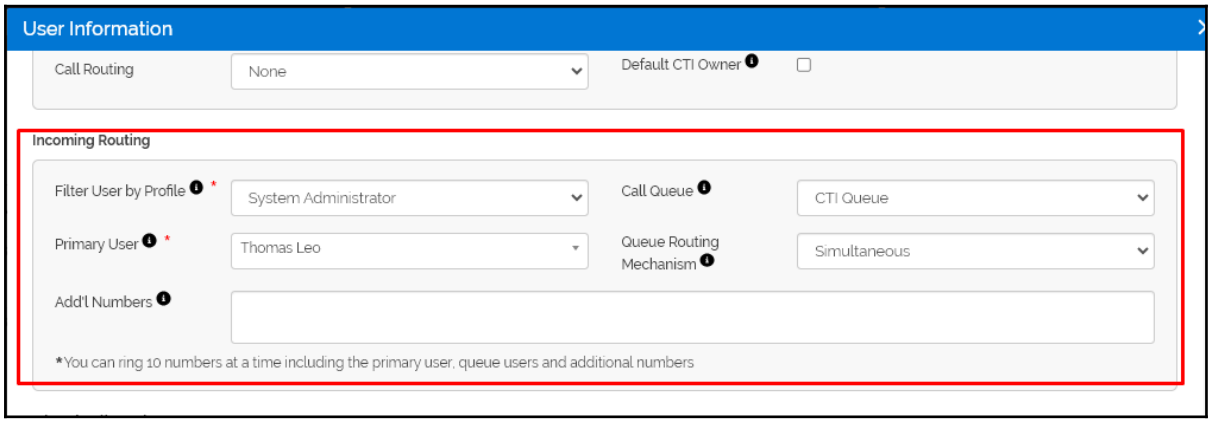


Fig:12 Call Routing

- **Filter User by Profile-** Enable the filtering of the user picklist to display only users associated with the specified security profile.
- **Call Queue-** Incoming calls are directed to users within the designated Queue. These Queues are configured in Salesforce Setup. Additionally, this number can be used by multiple users for outbound calling.

  The Incoming routing feature in 360 CTI is a powerful tool that allows organizations to automatically route group calls to the most appropriate agent or department, based queues in Salesforce, user need to create the Queue for group call routing.

To Create the Queue follow the below steps:

Navigate to the Setup Under Gear Icon in Salesforce >> In Quick Find box search for Queues >> Click to “New” button >> Fill the necessary information (such as- Queue Name and Email Address, Supported Object and Queue Members) >> Click to “Save” button

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

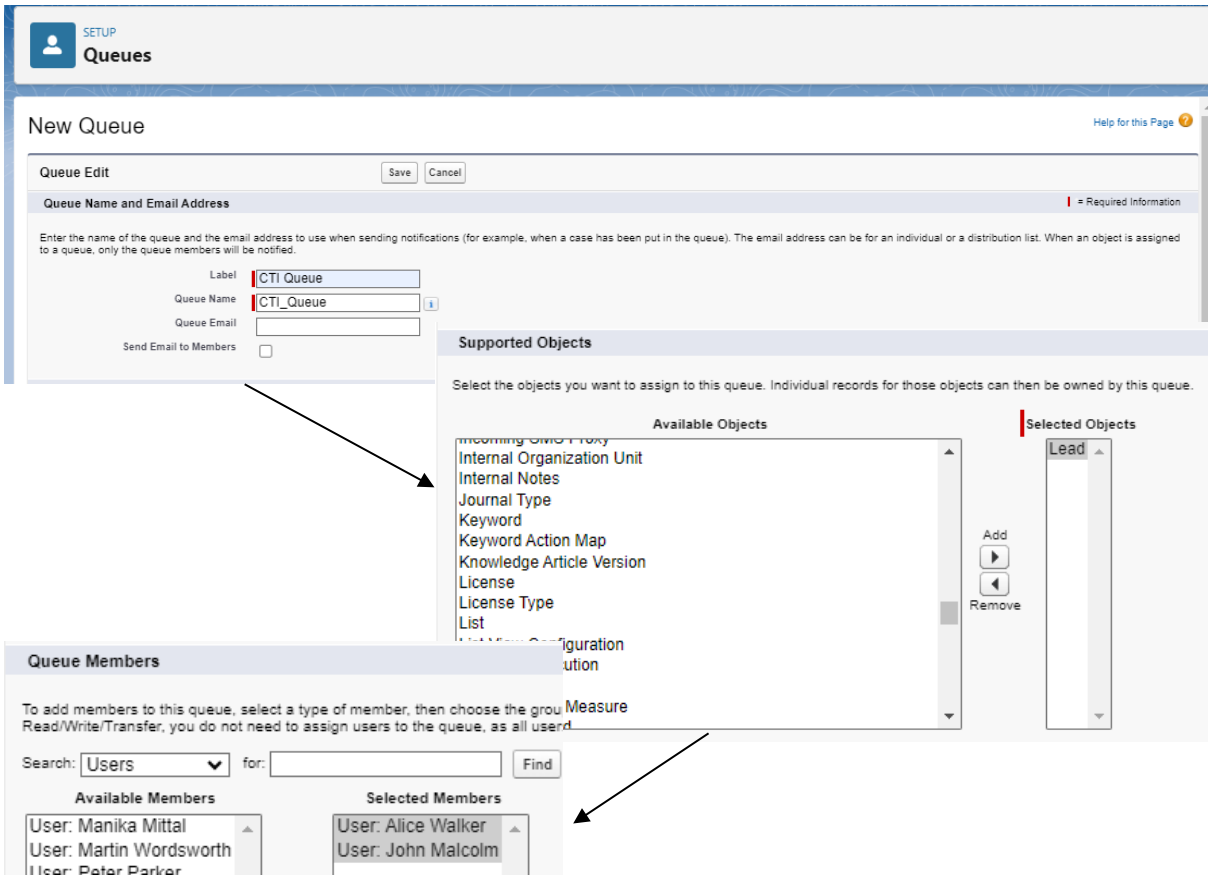


Fig:13 Queues

- **Primary User-** The user assigned to the number is also the first user in the queue if Queues are being used.
- **Queue Routing Mechanism-** It manages the call routing process within a queue.
- **Add'l Numbers-** Numbers added here, separated by commas, will ring simultaneously with the SF SoftPhone. Up to 9 numbers can be supported, which may include additional Salesforce Numbers, personal cell phones, or external numbers. If an external number answers the call, it will be attributed to the Primary User since there is no way to determine otherwise for calls answered outside of Salesforce.

  Note- You can simultaneously call a total of 10 numbers, which includes the primary user, users in the queue, and any additional numbers.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Missed Call Forwarding

If you are unavailable to answer incoming calls, you can set up missed call forwarding to redirect those calls to another phone number. You can forward calls to up to 9 additional phone numbers separated by comma.

To enable the missed call forwarding, follow the below steps:

Go to CTI Setup >> User Config. >> Look for the User you want to select and click on the Edit button beside their name >> Go to Missed Call Routing section >> add numbers >> Click to “Save” button

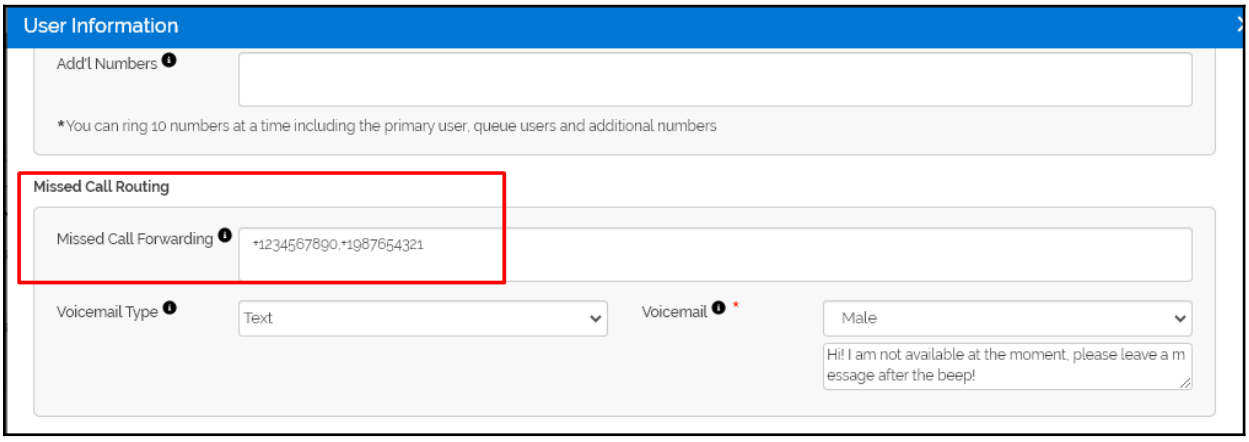


Fig 14: Missed Call Forwarding

You can also add call forwarding numbers through SoftPhone. Just go open SoftPhone then go to “Settings” to access the same.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

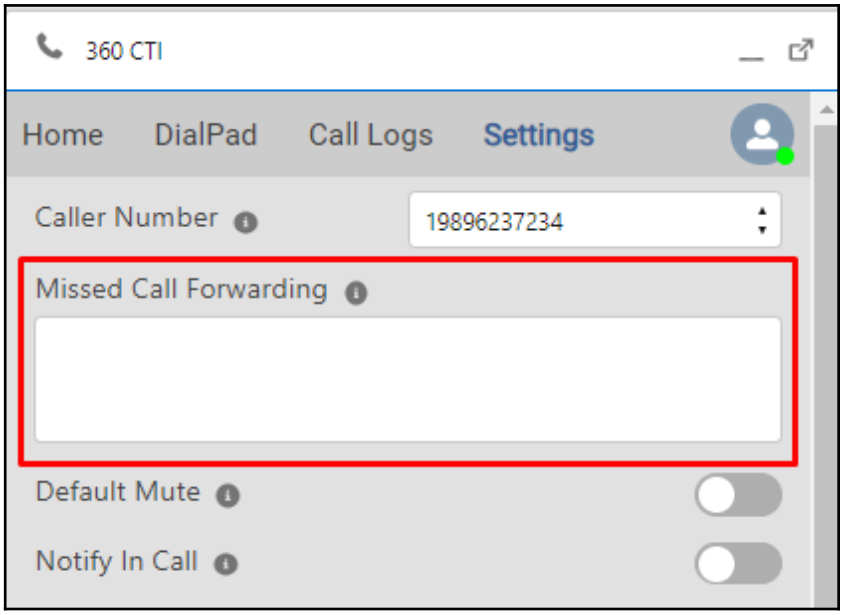


Fig 15: Missed Call Forwarding through SoftPhone

- **VoiceMail Type and VoiceMail-** Users can also configure their Voicemail settings, including selecting the voice (either "Male" or "Female") and setting the message to be played in case they are unavailable, as well as choosing the Voicemail Type (either "Text" or "Voice") for Missed Call Forwarding.
- **Missed Call Email Alerts (Per Number)-** Turn missed call email alerts on or off for this specific number. This per-number choice is honored even when missed call notifications are switched off globally in General Settings.

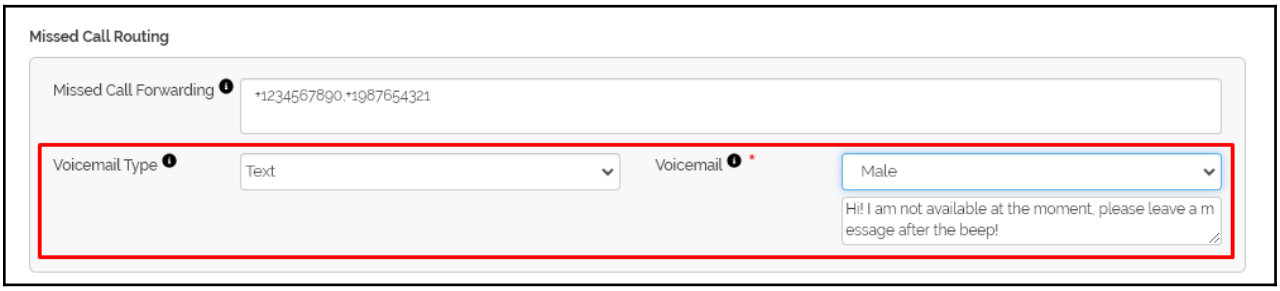


Fig: 16 Voice mail Type and Voicemail in Missed Call Forwarding

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Call Greeting

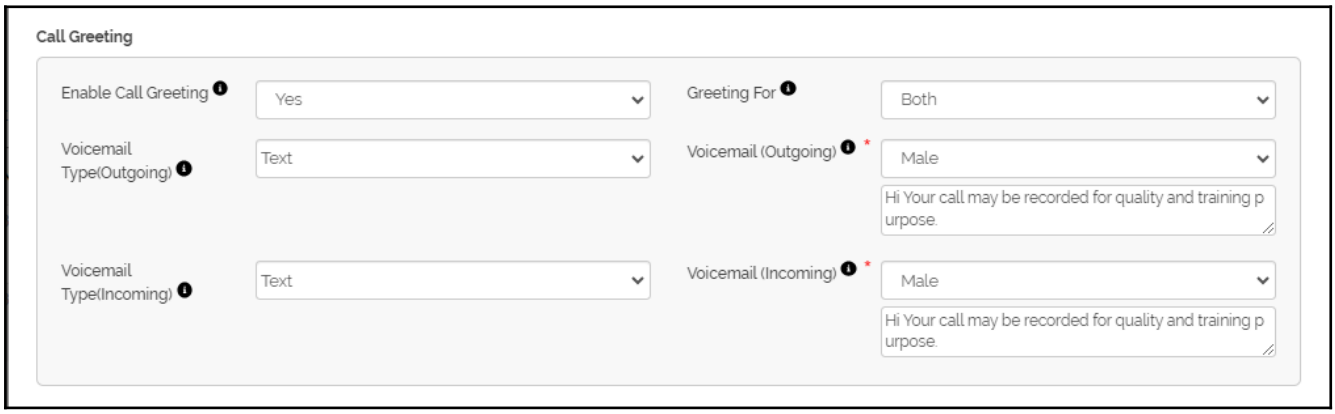


Fig:17 Call Greeting

- **Enable Call Greeting-** This feature enables the user to play robotic text or voice recordings on the recipient's device when the customer answers the call.
- **Greeting For-** This feature empowers the user to deliver automated text or voice messages during "Incoming," "Outgoing," or "Both" call scenarios, which are played on the recipient's device when they answer the call.
- **Voicemail Type(Outgoing and Incoming)-** Select either the Robot Voice (Text) option or record your own voice as the voicemail type.
- **Voicemail (Outgoing and Incoming)-** Text and recording for the voicemail.

Out Of Office

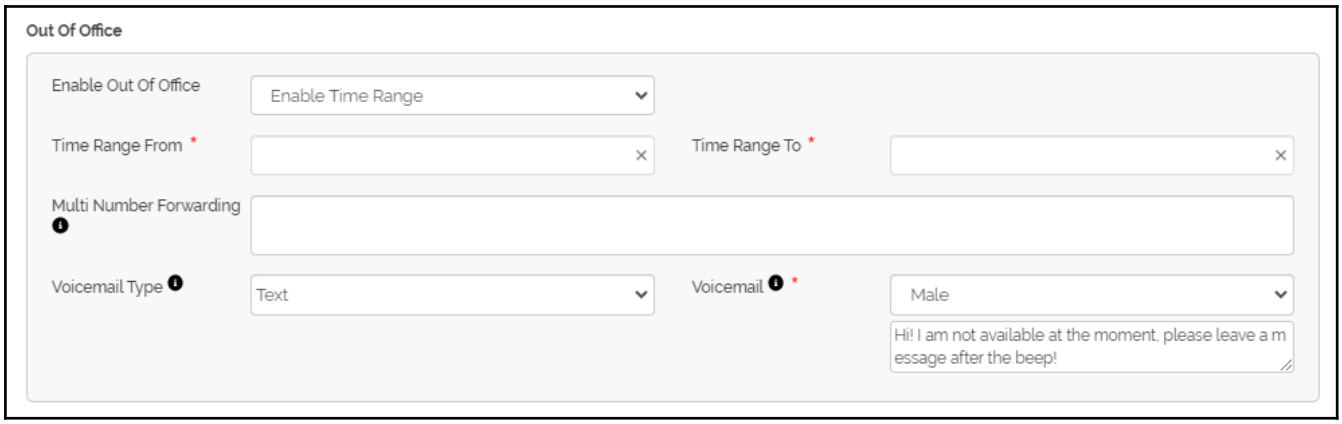


Fig:18 Out Of Office

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

- **Enable Out Of Office-**Users have the option to activate Out Of Office and configure the time frame as needed.
- **Time Range From-** Select the From time range.
- **Time Range To-** Select the To time range.
- **Multi Number Forwarding-** Specify a list of up to 9 numbers separated by commas, and these numbers will ring simultaneously when an incoming call is received in Salesforce.
- **Voicemail Type-** Choose the Robot Voice (Text) or record your own voice as a voicemail type
- **Voicemail-** The text or recording for the Voicemail.

Other Settings:

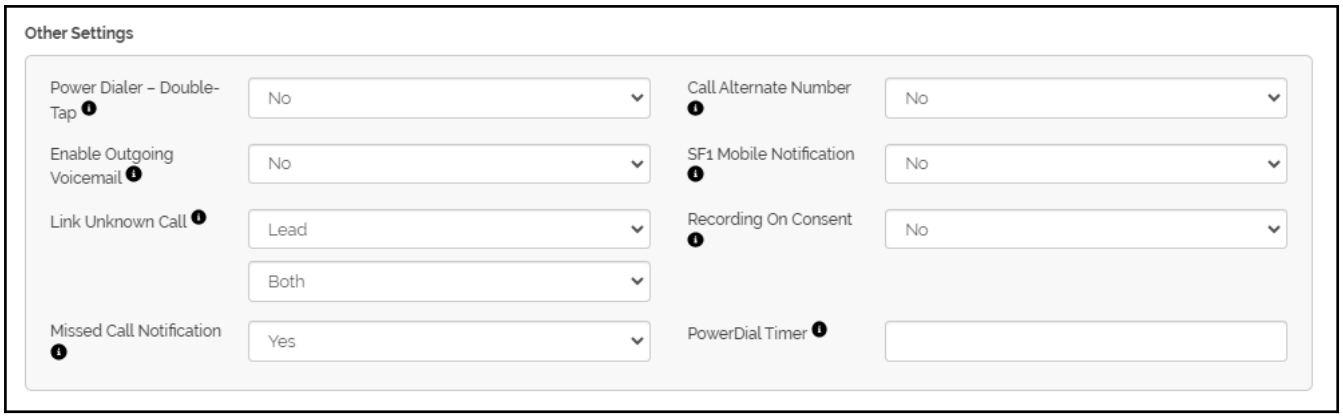


Fig: 19 Other Settings

- **Power Dialer – Double-Tap-** During Power Dialing mode exclusively, the system will make an additional call to the same number that was just dialed. This approach leverages a commonly used cold-calling tactic, where the customer may perceive a sense of urgency or importance associated with the caller's communication.
- **Call Alternate Number-** Select Yes if you want to call an alternate number on a record while using PowerDial.
- **Enable Outgoing Voicemail-** Enable End w/ Voicemail button to drop a voicemail on an outgoing call.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

- **SF1 Mobile Notification-** This is used to send push notifications to the SF1 mobile app for an incoming call forwarded from Salesforce.
- **Link Unknown Call-** Please refer to the link unknown call section of this document.
- **Recording On Consent-** This feature allows users to initiate or terminate call recording, and they will be notified when the call has been recorded.
- **Missed Call Notification-** Provides Missed Call Notification as email for Missed Call.
- **PowerDial Timer-** Set the time between two automatic calls while using the Power Dial.

Upload

Users can upload sheet in CSV format to populate the user list in User Config.
Supported columns include Label, Call Queue, Call Routing mechanism, Voicemail (Text or Voice, defaults to male voice), Call Greeting fields, SF1 Mobile Notification, Hold Music fields, and Enable Announcement fields.

My CTI Setup (Personal Settings)

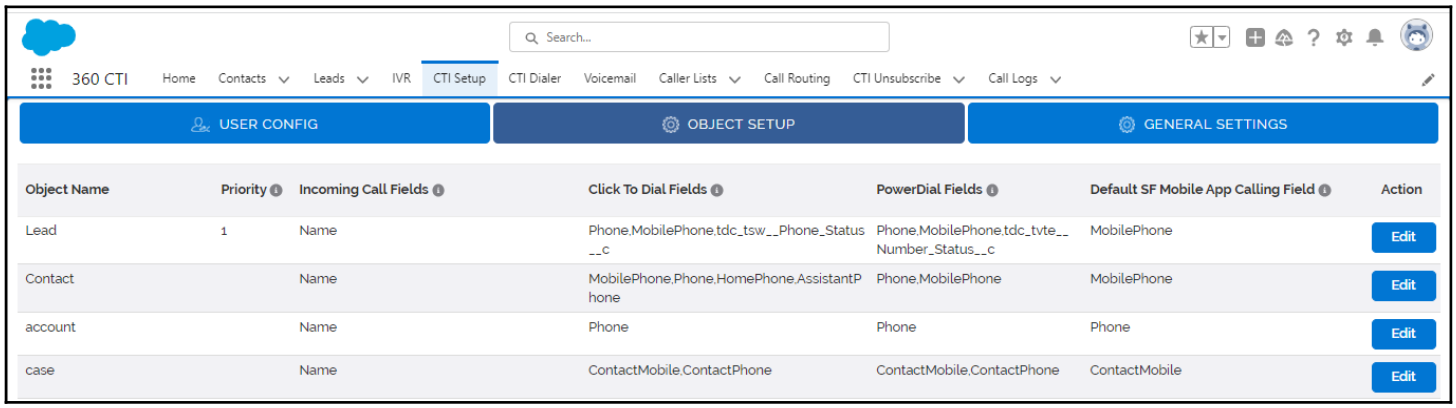
Each user has their own My CTI Setup tab for personal preferences — separate from the admin-level User Config described above. A user must click Edit and then Save at least once for their settings (including Call Score, below) to appear correctly in Reports.

- **Mobile Number-** The user's mobile number, used for PSTN calling and simultaneous-ring-to-mobile options.
- **Mute Incoming Call / Mute Ringing While On Calls-** Personal ringer preferences.
- **Voicemail Type and Voicemail-** The user's own default voicemail message and voice.
- **Select Ringtone-** Choose the ringtone played for incoming calls on this user's Softphone.
- **Show Disposition As-** Display dispositions as a dropdown or another format.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

- **Transcript Preferred Language-** The language live call transcripts display in for this user when using Call Monitoring – Listen. See Call Transcript, Call Coaching & AI Insights later in this guide.
- **Call Score-** Read-only. Shows this user's average Call Score, recalculated daily. Requires Post Call Transcript to be enabled. See Call Transcript, Call Coaching & AI Insights.

Object Setup Tab



Object Name	Priority	Incoming Call Fields	Click To Dial Fields	PowerDial Fields	Default SF Mobile App Calling Field	Action
Lead	1	Name	Phone,MobilePhone,tdc_tsw__Phone_Status__c	Phone,MobilePhone,tdc_tvte__Number_Status__c	MobilePhone	Edit
Contact		Name	MobilePhone,Phone,HomePhone,AssistantPhone	Phone,MobilePhone	MobilePhone	Edit
account		Name	Phone	Phone	Phone	Edit
case		Name	ContactMobile,ContactPhone	ContactMobile,ContactPhone	ContactMobile	Edit

Fig 20: Object Setup

- **Priority-** Priority controls the default object match for an incoming call in the situation where the incoming number is potentially in multiple objects. So if the same number is in Leads and Contacts the call matches to the Lower Priority object (Lead vs Contact).
- **Incoming Call Fields-** Chosen fields will be visible on the dialer when an incoming call is ringing. Incoming call fields are arranged in a single column layout, going from top to bottom.
- **Click To Dial Fields-** Choose the fields for the Click to Dial component. This feature supports fields with data types Phone and Formula (Text/Number). These fields on the Click to Dial are arranged in a two-column layout, moving from left to right before continuing to the next row.
- **PowerDial Fields -** To set the multiple calling fields while using the PowerDial.
- **Default SF Mobile App Calling Field-** Overrides the Click-to-Dial fields within the Mobile 'call' button, allowing for a direct call to the specified field without

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

going through the dialer screen. This is not advisable when dealing with multiple phone fields.

General Settings Tab

Call Settings

- **Site URL-** This is the Site URL for Outgoing Calls.
- **CTI App Owner-** The owner of the CTI app where the call would be routed when same number is assign to multiple users or All User record.

Note : any Salesforce profile with access to the required CTI App objects can now be set as CTI App Owner — this is no longer restricted to the System Administrator profile.

- **Call Recording Type-** Select type of call recording- “Single Channel” and “Dual Channel”

  Note- For Dual Channel recording type, it will have an impact on the price as well as on the storage space. Contact your account manager for more details.

- **Enable Call Conference-** Activate call conferencing for both incoming and outgoing calls.
- **Enable Call Transfer-** Enable the capability to transfer calls while you are already on a call.
- **Call Transfer Type-** Select the call transfer method between "Warm" and "Cold".

  Warm Transfer- Select "Warm Transfer" to allow the user to stay on the call while the transfer is in progress.

  Cold Transfer- Choose "Cold Transfer" to immediately disconnect the user once the transfer is initiated.

- **Call Log Subject-** Set format for Call Log subject.



Fig:21 Call Log Subject

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

- **Incoming Call Queue Routing Time-** Offer an option to manage the routing of incoming calls among queue users after a specific number of seconds.

SF1 Mobile App Calling

CTI supports both PSTN and VoIP calling in the SF1 Mobile App. This is controlled by Enable PSTN Calling for the SF1 Mobile App in General Settings.

- **Yes-** A call placed from the SF1 Quick Action, SF1 Dial Pad, or SF1 Softphone first rings the agent's own mobile number (as set on their User record). Once the agent answers, the call connects to the customer.
- **No-** The call connects directly to the customer over VoIP.

Numbers dialed via Click-to-Dial are also saved in one consistent format (for example +1XXXXXXXXXX) in Call Logs and Task records, with no extra symbols or spacing.

Missed Call Settings

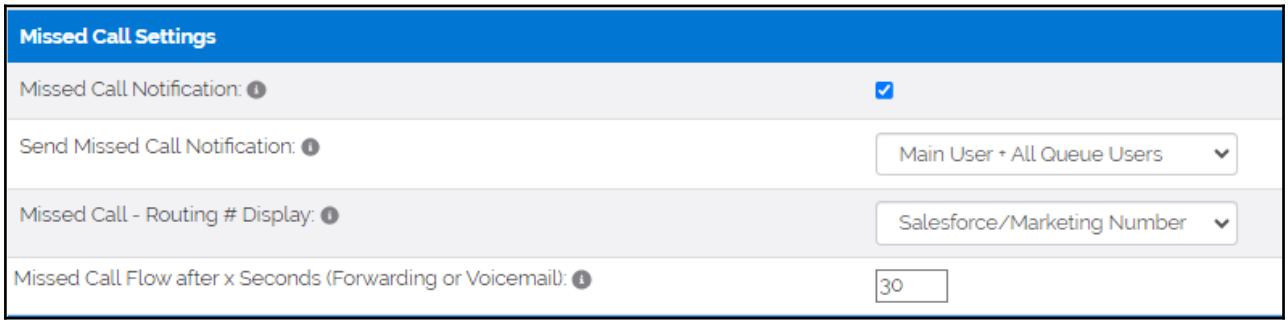


Fig:22 Missed Call Settings

- **Missed Call Notification-** It offers email notifications for missed calls.
- **Send Missed Call Notification-** Select an option for whom to send missed call notifications.
- **Missed Call - Routing # Display-** Manage the number that appears on the destination device when forwarding a call through the missed call feature.
- **Missed Call Flow after x Seconds (Forwarding or Voicemail)-** Offer an option to control voicemail settings after a specified number of seconds.
- **App Default Voicemail-** Set a default auto-read text message here. It pre-fills wherever a text voicemail field appears across the app (Missed Call Forwarding, Call Greeting, Out of Office, Call Routing, and more) — users can still override it on individual records.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Disposition Settings

- **Disposition-** Set disposition option in comma separated format (as shown in figure):



Fig:23 Disposition

- **Default Disposition For Outgoing Call-** Set any disposition option as default for outgoing call.

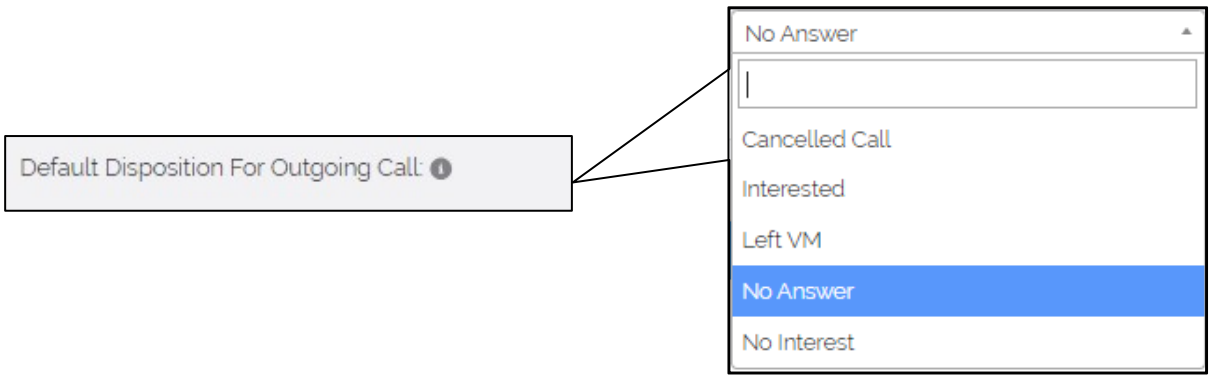


Fig: 24 Default Dispostion for Outgoing call

- **Default Disposition For Incoming Call-** Set any disposition option as default for incoming call.

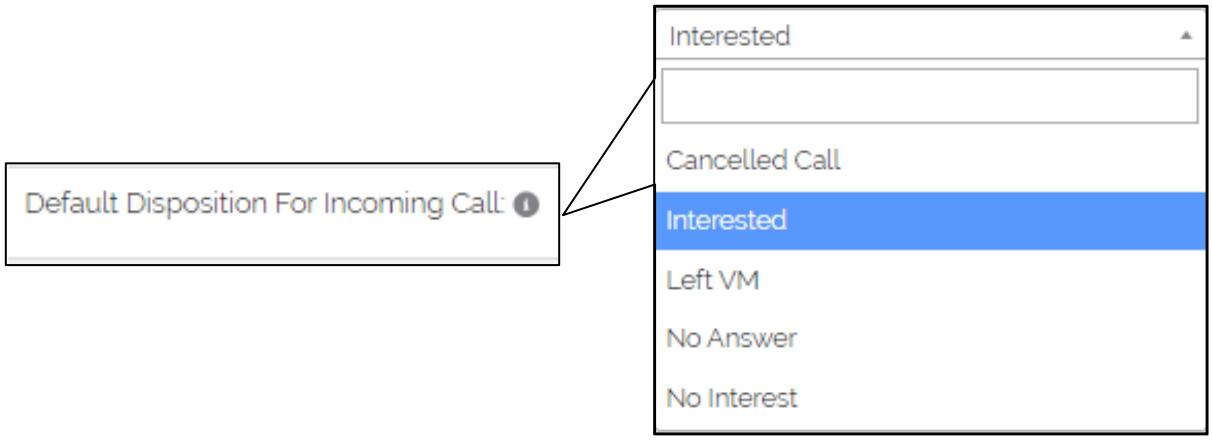


Fig:25 Default Dispostion for Incoming call

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

- **Mandatory Comment For Disposition-** Choose the Disposition option for which the description field must be mandatory.

Note : if a disposition screen is left open and a new call arrives, CTI automatically saves and syncs all open Softphone tabs first, so the new call is never mapped to a stale, already-open disposition screen.

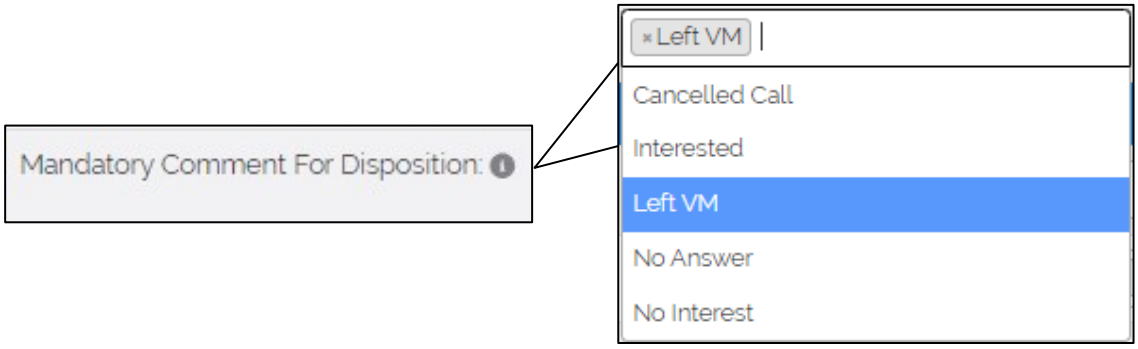


Fig: 26 Mandatory Comment For Disposition

SoftPhone Settings

- **SoftPhone Task Fields-** Choose which Call Log fields to display on the 360 CTI SoftPhone. You have the option to pick up to five fields, and the supported data types include text, TextArea, Picklist, Checkbox, Date, or DateTime.

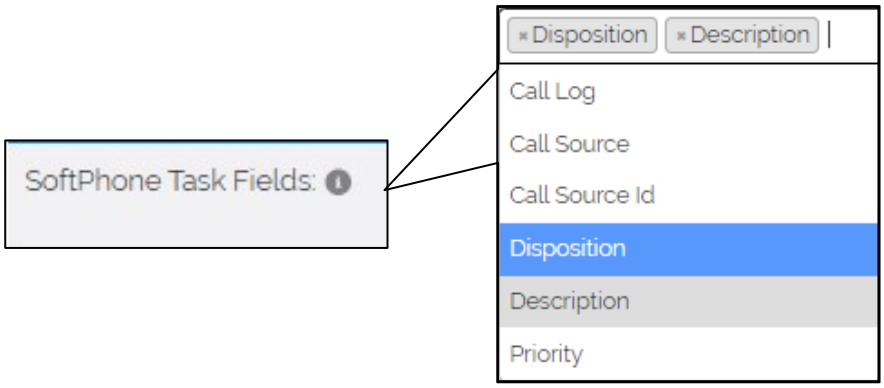


Fig: 27 SoftPhone Task Fields

- **SoftPhone Navigation-** Arrange the tabs of CTI SoftPhone.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

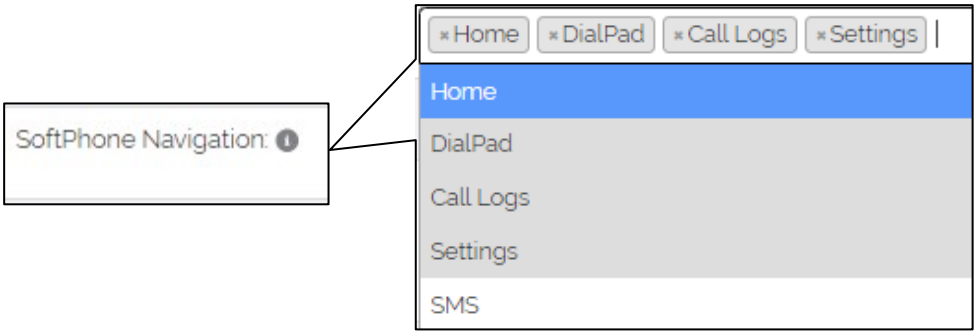


Fig:28 SoftPhone Navigation

- **Minimize CTI SoftPhone On Call Completion-** After completing an incoming or outgoing call, reduce the SoftPhone window.



Fig: 29 Minimise CTI SoftPhone On Call Completion

- **Mute Notify Incoming Call Ring-** Allow muting incoming call ring sounds for notifications.



Fig 30: Mute notify incoming call ring

- **Show Ringing Users-** Choose "Yes" to view a list of all users currently receiving the incoming call.



Fig:31 Show Ringing Users

SoftPhone Dashboard Settings

- **Outgoing Calls History View-** Select List View for Outgoing Calls (as shown in below figure):

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

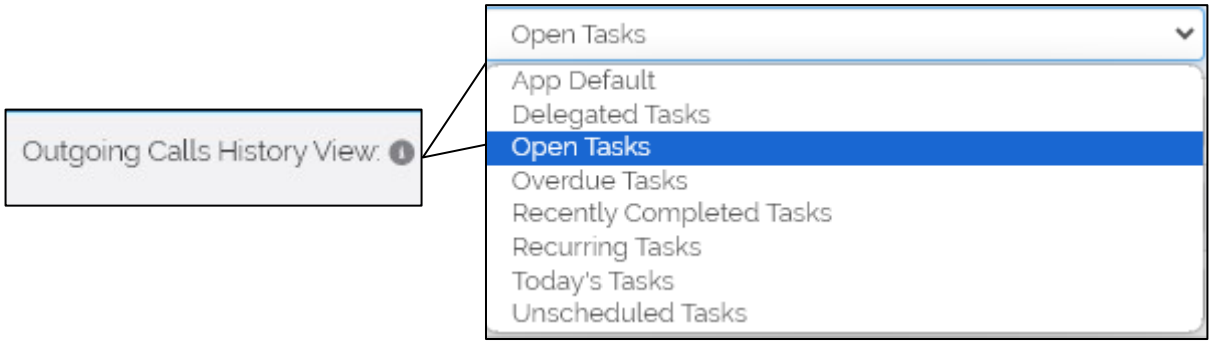


Fig: 32 Outgoing Calls History View

- **Incoming Calls History View-** Select List View for Incoming Calls (as shown in below figure):

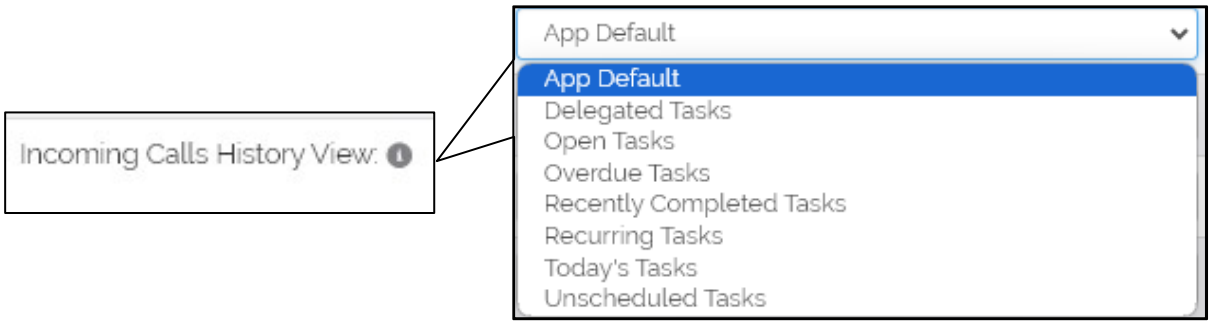


Fig: 33 Incoming Calls History View

- **Missed Calls History View-** Choose the Missed Calls List View. (as shown in below figure):

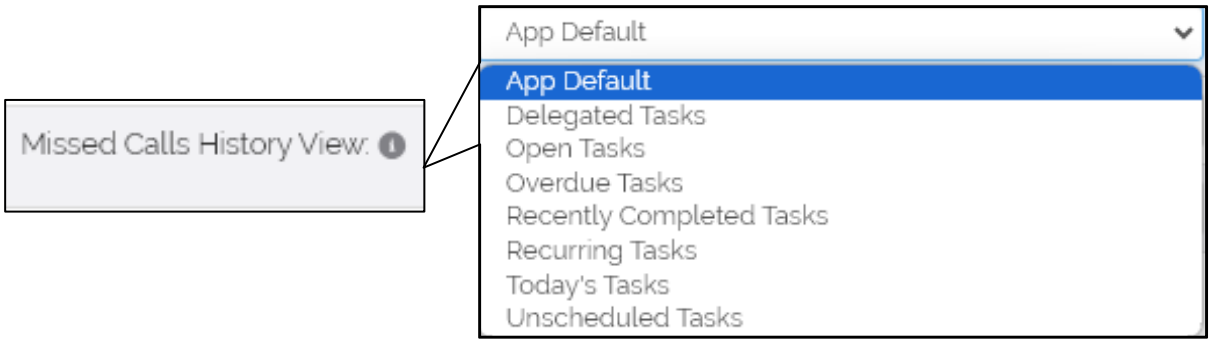


Fig:34 Missed Calls History View

- **Voicemails History View-** Choose the Voicemails List View. (as shown in below figure):

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

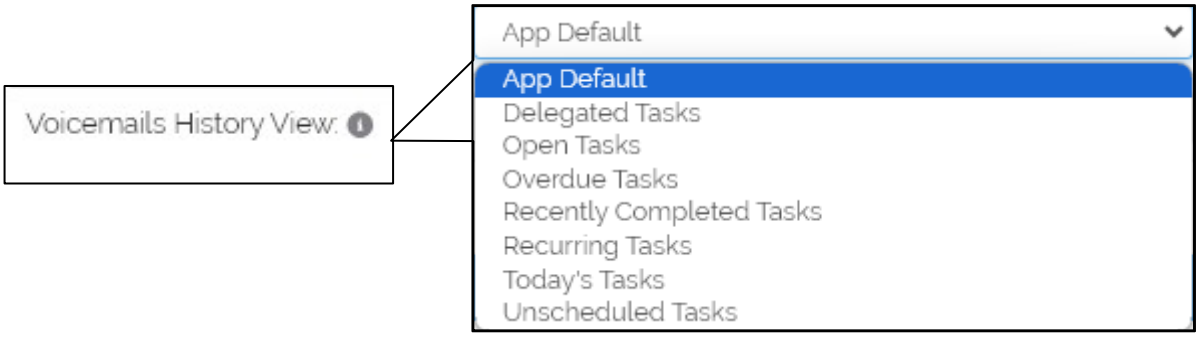


Fig:35 Voicemails History View

- **Pending Call List View-** Choose the Pending Calls List View (as shown in below figure):

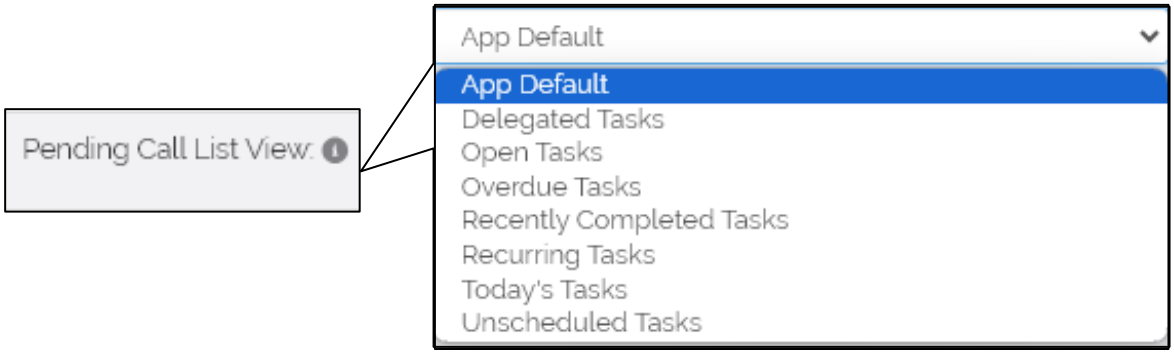


Fig: 36 Pending Call List View

IVR Settings

- **IVR Dark Hours From-** Enter Start time for IVR dark hours.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

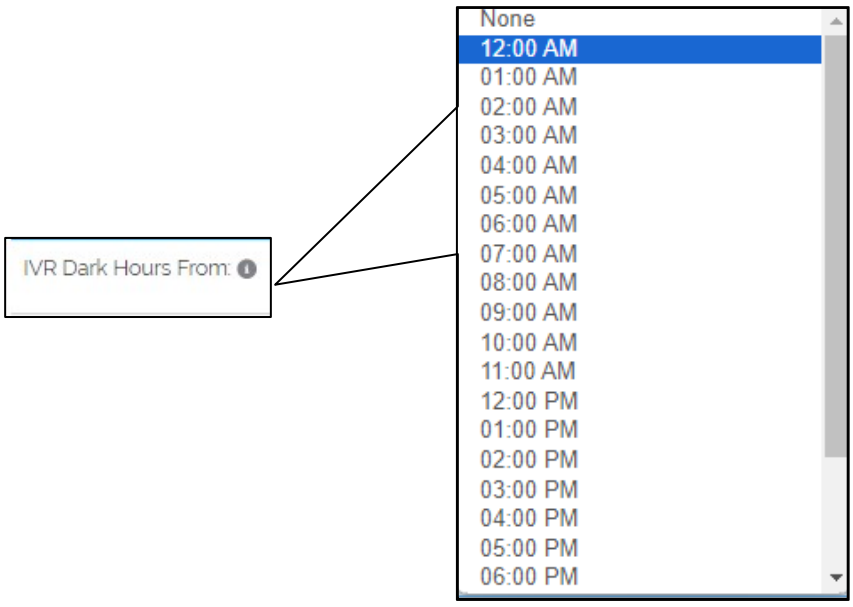


Fig:37 IVR Dark Hours From

- **IVR Dark Hours To-** Enter End time for IVR dark hours.

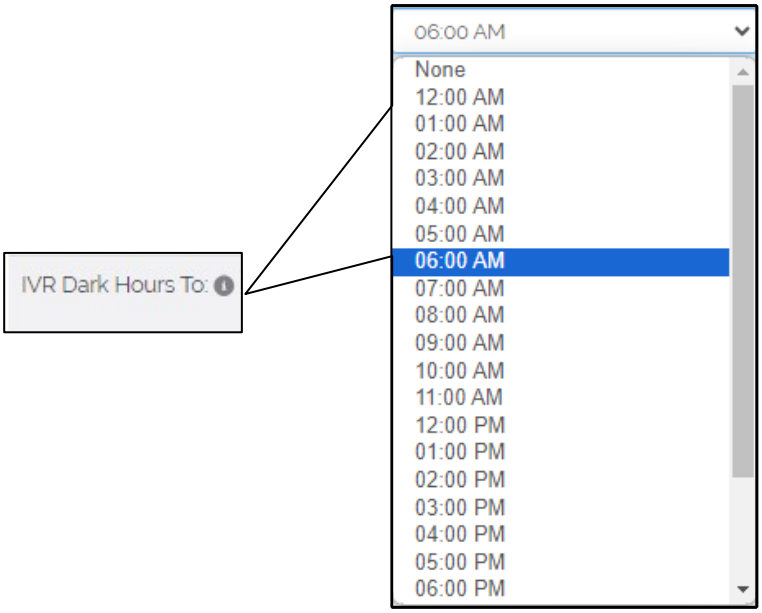


Fig:38 IVR Dark Hours To

AI Settings

AI Settings, in General Settings, power the OpenAI-based features across CTI: live transcription, Call Coaching, Call Score, and Call Insights.

- **Key-** Your OpenAI API key. Once saved, it is masked and not displayed again in the UI.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

- **Auto Call Tagging-** Let AI auto-fill the Disposition field after a call ends, based on the conversation.
- **Call Coaching-** Set to Auto to generate coaching insights for every call, or Manual so a supervisor requests coaching for a specific call from Call Monitoring.
- **Enable Call Coaching Quick Actions-** Show quick-action coaching prompts on the Softphone's Call Coaching tab.
- **Default Voice Agent for Call Coaching-** The Agentforce agent shown by default on the Softphone's Call Coaching tab.
- **AI Autofill Softphone Task Fields-** Choose which Softphone Task fields AI should fill in automatically after a call. Configured per Salesforce profile, so different teams can have different auto-fill behavior.
- **Call Score Instructions-** Instructions telling the AI how to calculate each call's Call Score (0–100). Default instructions are included on install and upgrade; edit or clear this field to change the scoring criteria. This field and the legacy Call Transcript Keywords field are mutually exclusive — setting one grays out the other.
- **Call Insights Instructions-** Instructions telling the AI what to focus on when generating post-call coaching insights. Clearing this field turns Call Insights off.
- **Off-Topic Instructions-** List casual phrases (for example Hi, Hello, Thank you) for Call Coaching to ignore, so insights focus on the substantive part of the conversation.
- **Call Transcription Type / Live Call Transcription Type-** Choose which calls get transcribed and the language used for live transcription.
- **Transcript Speaker Label Format-** Show either actual participant names or generic labels (Person A / Person B) in transcripts.
- **Transcribe Calls Longer Than-** Only transcribe calls that run longer than this threshold.

Note : see Call Transcript, Call Coaching & AI Insights later in this guide for how these settings show up on a call.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Default Disposition

A default disposition refers to a pre-set status or outcome that is automatically assigned to a call, when it is initiated. For instance, Interested, No answer, Nurture, etc.

Follow the steps given below to access Disposition Settings:
Go to General Settings > Disposition Settings > add the default Disposition

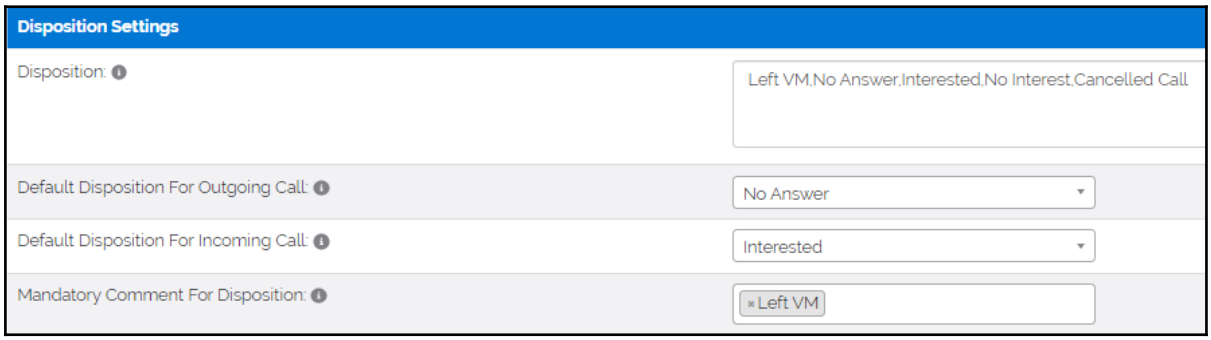


Fig: 39 Disposition Settings

Number Label

You can label users' numbers through CTI Setup: User Config to identify multiple numbers.

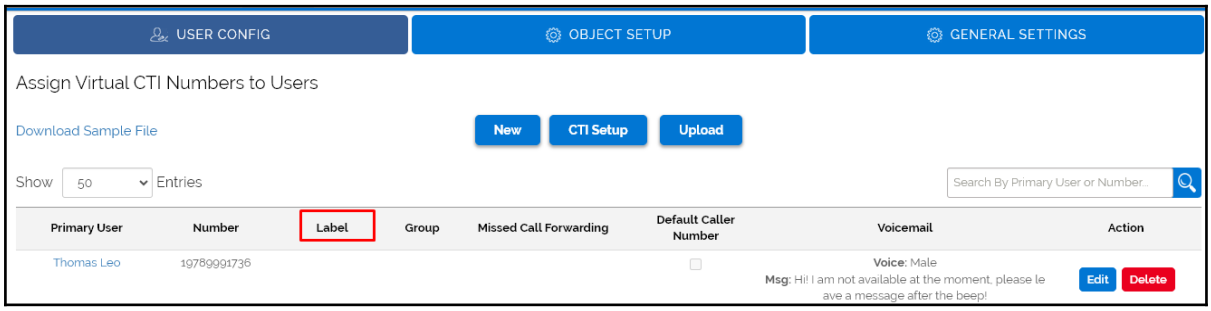


Fig: 40 Number Label

Call Transfer

The call transfer feature in 360 CTI allows agents to transfer a live call to another agent within the organization. This can be useful when the caller's issue requires the expertise of another agent or when the agent is unable to resolve the issue on their own.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Follow the steps below to go to Call Transfer settings:
CTI Setup >> General Settings > Call Settings > check the “Enable Call Transfer” box >> Enable the checkbox >> Click to “Save” button

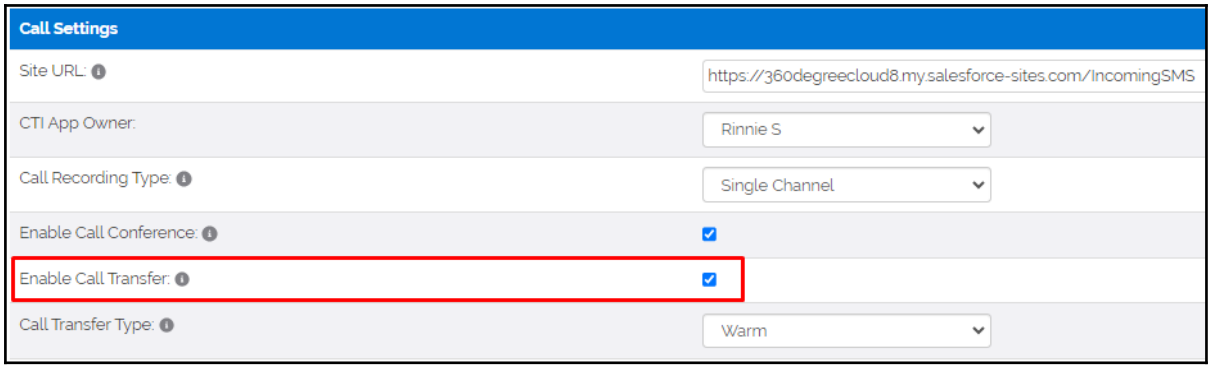


Fig: 41 Call Transfer

You can transfer a call to someone else through Call Transfer option in the SoftPhone during an existing call as shown below.

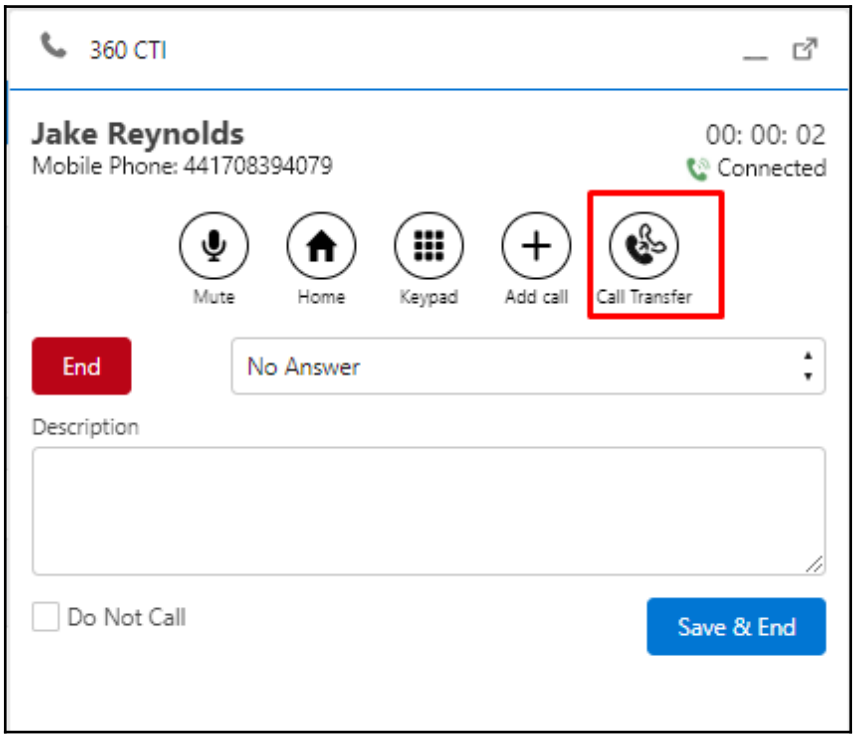


Fig : 42 Call transfer while on call

You can transfer the call through an Object. For example: to a Salesforce User

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

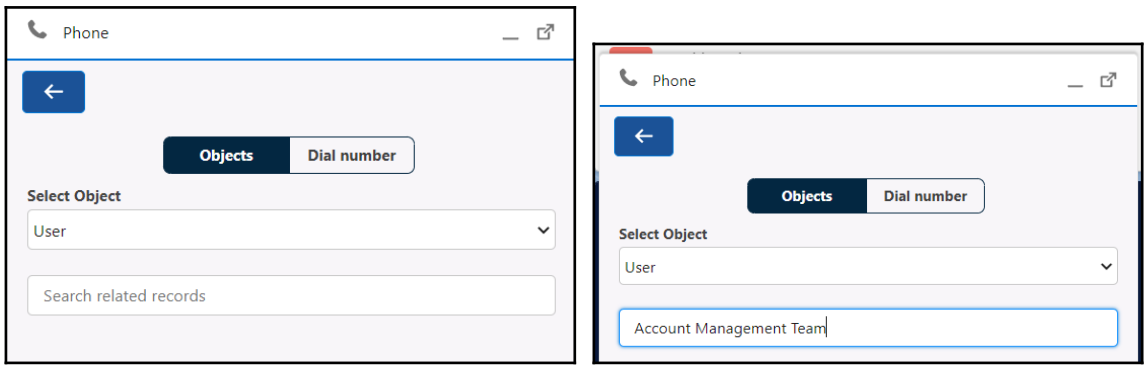


Fig: 43 Call transfer via Object while on call

- You can even dial a number as shown below.

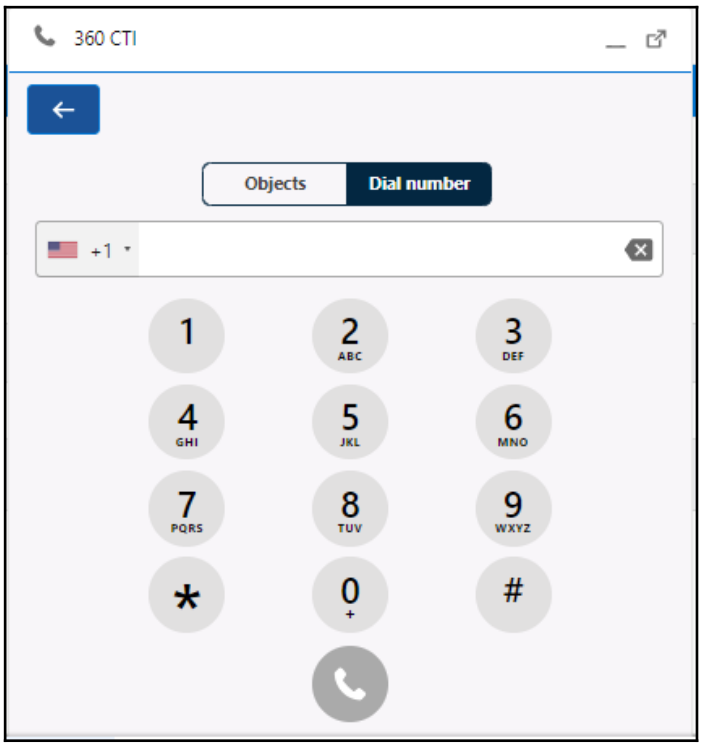


Fig: 44 Call transfer via dialpad while on call

Compliance Mechanism

Do Not Call

The "Do Not Call" feature in 360 CTI allows customers to opt out of receiving calls from a business. When a customer requests not to be called, the same is enabled by going to their record detail page and enabling the “Do Not Call” checkbox. You can

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

stop calls to that client at record level. So no one from the organization will be able to call that client.

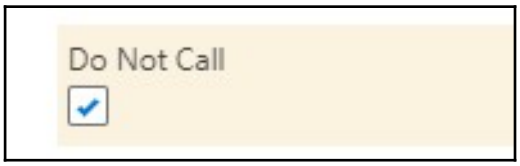


Fig 45 Do Not Call

You can also do the same from SoftPhone. While you are on a call and the customer requests to not call back, you can simply click on “Do Not Call” at the bottom.

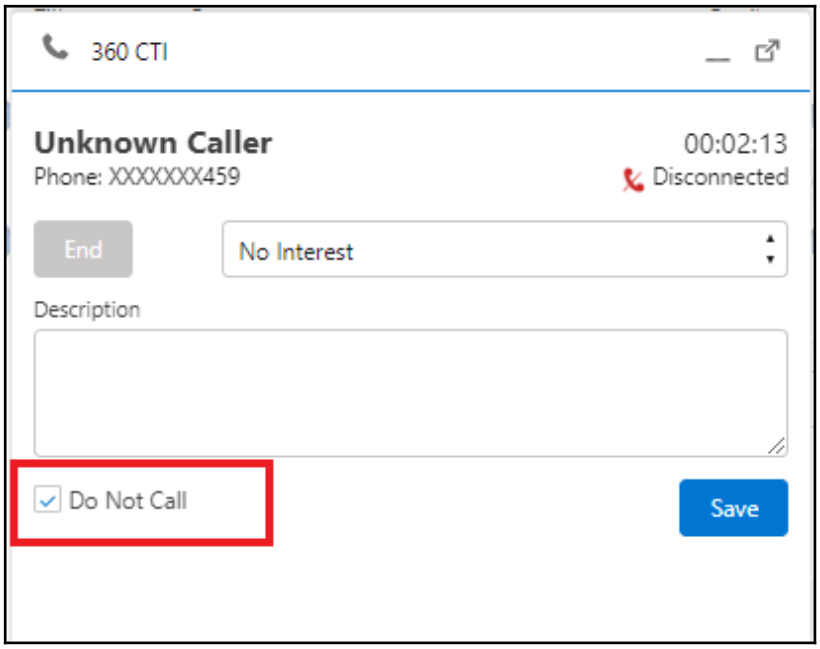


Fig : 46 Enable Do Not Call from CTI SoftPhone

Company Wise

If this option is selected, when a record is marked as Do Not Call, Salesforce users will be restricted from making outgoing calls to any of the phone numbers associated with that particular record.



Fig:47 Compliance Mechanism- Company Wise

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Record Wise

In Record Wise there are two options in Subtype:

Caller Number-Wise- When this option is selected, if a user initiates an outgoing call to a customer's phone number using a CTI phone number, and the 'Do Not Call' flag is set to true, it indicates that Salesforce users are prohibited from making outgoing calls to that specific customer's phone number using their CTI phone numbers. The 'Do Not Call' restriction applies to the combination of the 'From' (CTI phone number) and 'To' (customer's phone number) numbers. To monitor and store this information, there is an object called 'CTI Unsubscribe' that Captures all the necessary details.



Fig:48 Compliance Mechanism- Record Wise- Caller Number-Wise subtype

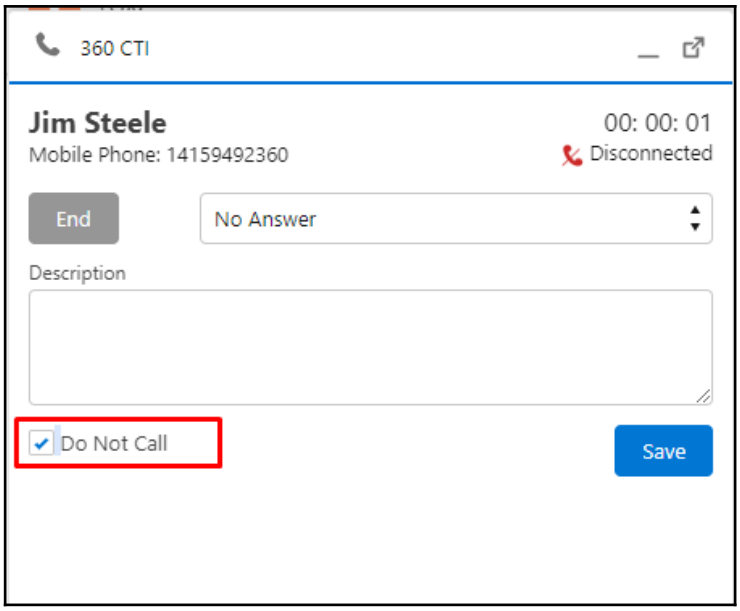


Fig:49 Do Not Call checkbox

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

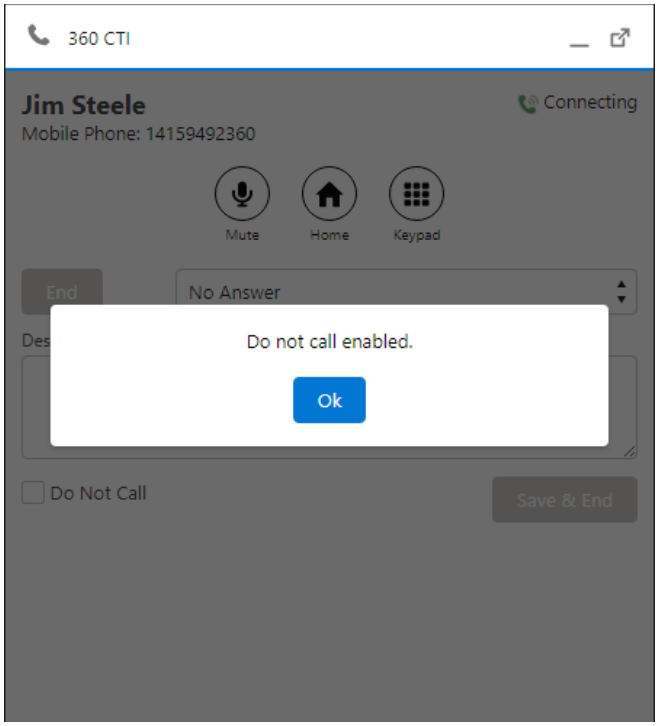


Fig:50 Do Not Call enabled

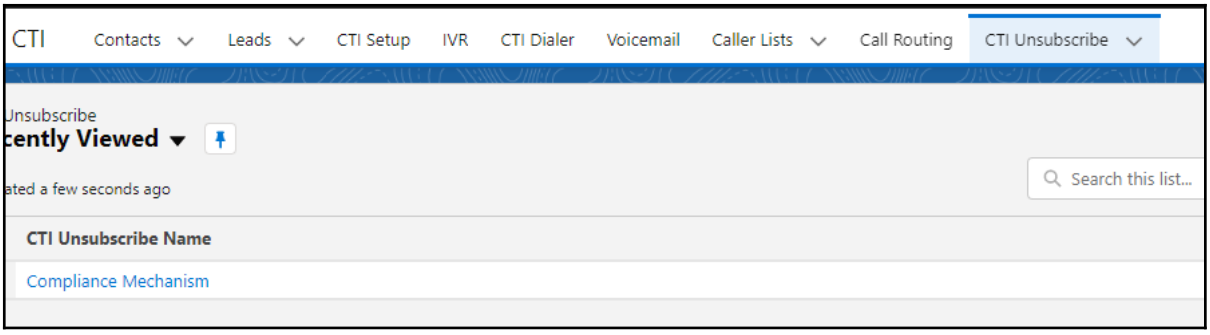


Fig:51 Do Not Call record created in CTI unsubscribe

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

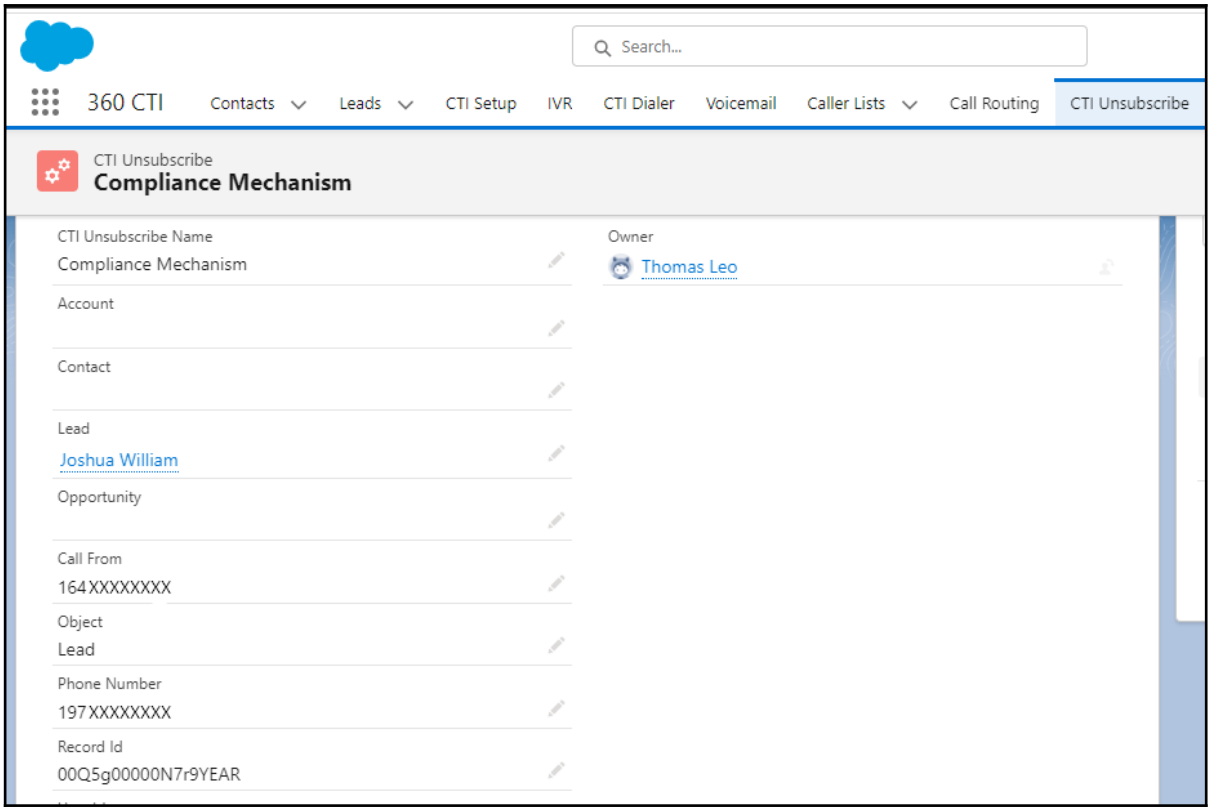


Fig:52 Unsubscribe record details for Do Not Call record

Org-Wide- When this option is selected, if a user places an outgoing call to a customer's phone number using a CTI phone number, and the 'Do Not Call' flag is set to true, it restricts the Salesforce user from making any outbound calls to that specific customer's phone number from any CTI phone numbers associated with their office. This restriction applies even if the Salesforce user has multiple phone numbers at their disposal. To monitor and record this information, there is an object called 'CTI Unsubscribe' that captures all the relevant details.

Note : regardless of which Compliance Mechanism is active, marking a record Do Not Call now always works through the CTI Unsubscribe object — see Do Not Call Functionality for the current step-by-step behavior.

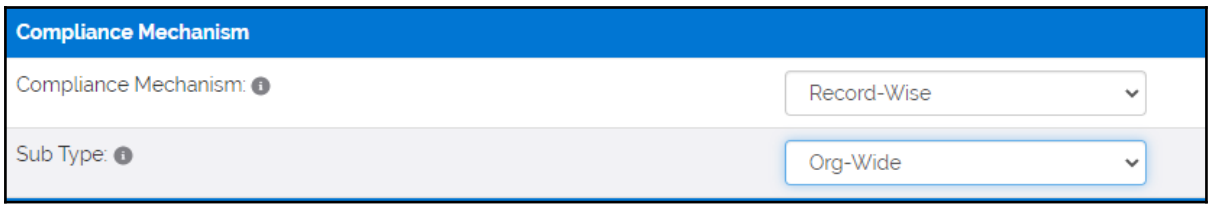


Fig:53 Compliance Mechanism- Record Wise- Org Wide- subtype

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Blacklisted Numbers

You can input multiple numbers in a comma-separated format, and calls originating from these numbers will not be accepted, with no record of these calls being tracked in Salesforce.

Sync Recording with Provider

If you choose "No," the recording won't be saved in Salesforce, and storage fees will be incurred according to your storage usage.

For more information please contact: [360 Support team]

Select Schedule Time

Disconnected calls, including hang-ups, may remain in the "In Progress" status indefinitely. The scheduler runs every X minutes to identify improperly logged calls and mark them as completed.

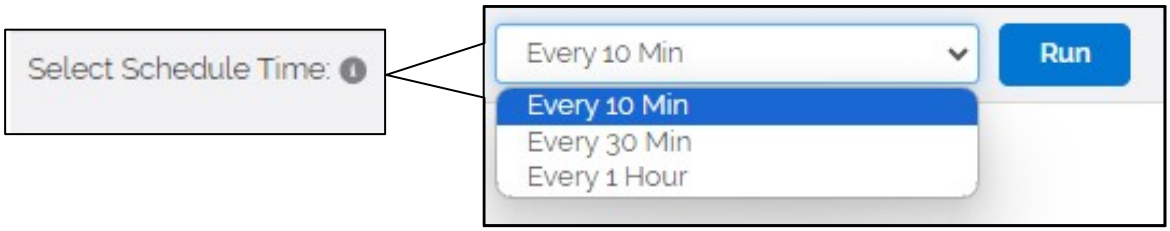


Fig: 54 Select Schedule Time

Control fields displayed on CTI SoftPhone

You can edit and control the fields that are displayed on CTI SoftPhone on the Call End screen. Go to General Settings, scroll down to SoftPhone Settings, and edit SoftPhone Task Fields.



Fig : 55 SoftPhone Settings

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Franchise Model

The Franchise Model lets a CTI number shared across multiple branches or franchisees automatically link a call to the correct branch record, based on a matching Franchise Name.

To enable the Franchise Model, follow the below steps:

General Settings >> turn on Enable Franchise Model >> In the Franchise Name field that appears, enter the API name of the franchise field on your objects (e.g., Franchise_Name__c) >> On each User Config record, set the Franchise Name for that user/number >> Click “Save” button

- **How it works-** CTI checks the objects configured on CTI Object Setup for a field with that API name, searches the 100 most recently created records per object for the customer's number, and keeps only the records whose Franchise Name matches the calling number's franchise. If more than one record matches, the most recently created record is used, and the call log links to that record only.

CTI Help Tab

A CTI Help tab is available with quick, searchable guidance covering User Configuration, Object Setup, General Settings, Power Dial, Click to Dial, Calling List, Voice Broadcast, and Experience Cloud setup. It is not added by default — add it from the Pencil (Edit) icon on the 360 CTI app's navigation bar.

Power Dial

Power Dial in 360 CTI

Power Dial functionality is used to call a specified list of users sequentially. The users are put in a specific sequence by the Salesforce list view and then the Power Dial button ensures the function that all the users are called up in a sequence without the need for going to individual records to or to even dial the numbers separately. It also provides you the options to skip a particular contact and also you can break the dialing chain at whatever point you feel the need to do so. This is present as a button on the object record detail page.

Notes:

1. Power Dial works only in the Split View of the particular object records.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

2. Power Dial doesn't work in the "Recently Viewed" list view in the split view.

Power Dial Button on Standard Objects

Once the CTI package is installed, the Power Dial button will be added from the standard objects page layout. For locating the Power Dial button on the standard objects, follow the following steps :

For accessing the Power Dial button on standard objects, follow the following steps:

Open any record of a standard object, for example Lead, by clicking on it.
>> On the top right, you will see a button for Power Dial functionality.

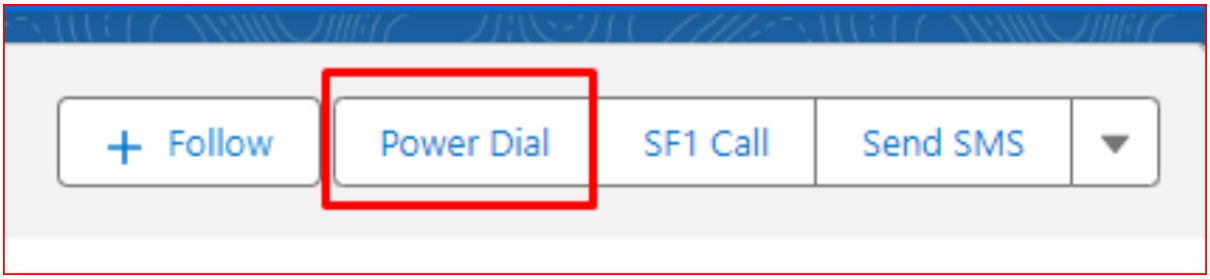


Fig 56 Power Dial Button on Standard Objects

Power Dial Button on Custom Object

For the custom objects, it is necessary to have the object set up for the CTI Services and then to add the Power Dial button to the page layout.

Object Setup for CTI Services

For setting up the object for the CTI services, follow the following steps

Go to 360SMS App >> Go to SMS Setup tab >> Go to Object Setup >> Select the object and corresponding Phone API fields >> Click on the Save button.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

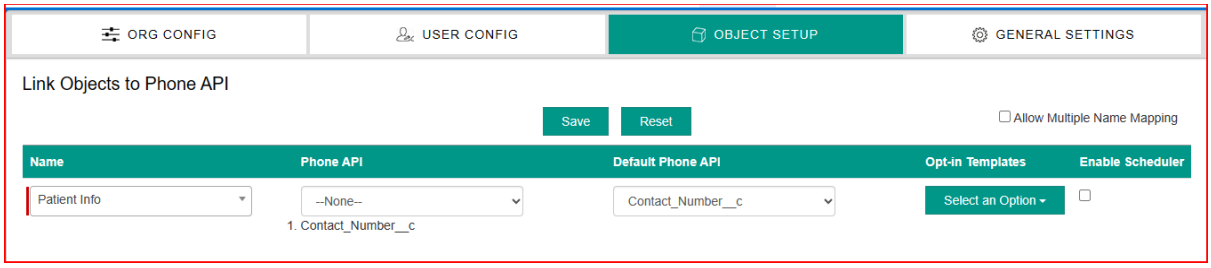


Fig 57: CTI Object Setup

Power Dial Button on Page Layout

To create a Power Dial button on a custom object page layout, follow the following steps:

Go to setup >> Go to Object Manager >> Go to the Custom Object (here Patient Info) >> Go to “Buttons, Links and Actions” section >> Click on “New Action” button >> Fill up the details as shown in below figure >> Click on save >> Go to the Page Layout for the same object >> From the “Buttons Links and Actions” drag and drop the newly created button on the “Salesforce Mobile ad Lightning Experience” section >> Save the page layout changes.

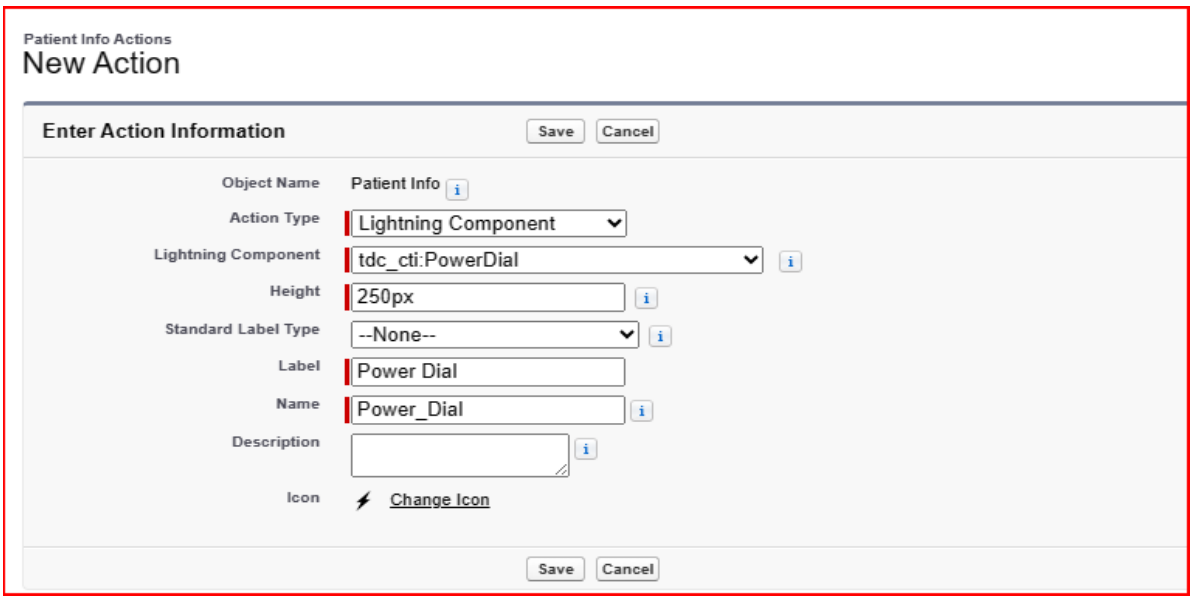


Fig 58: Power Dial Button Details

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

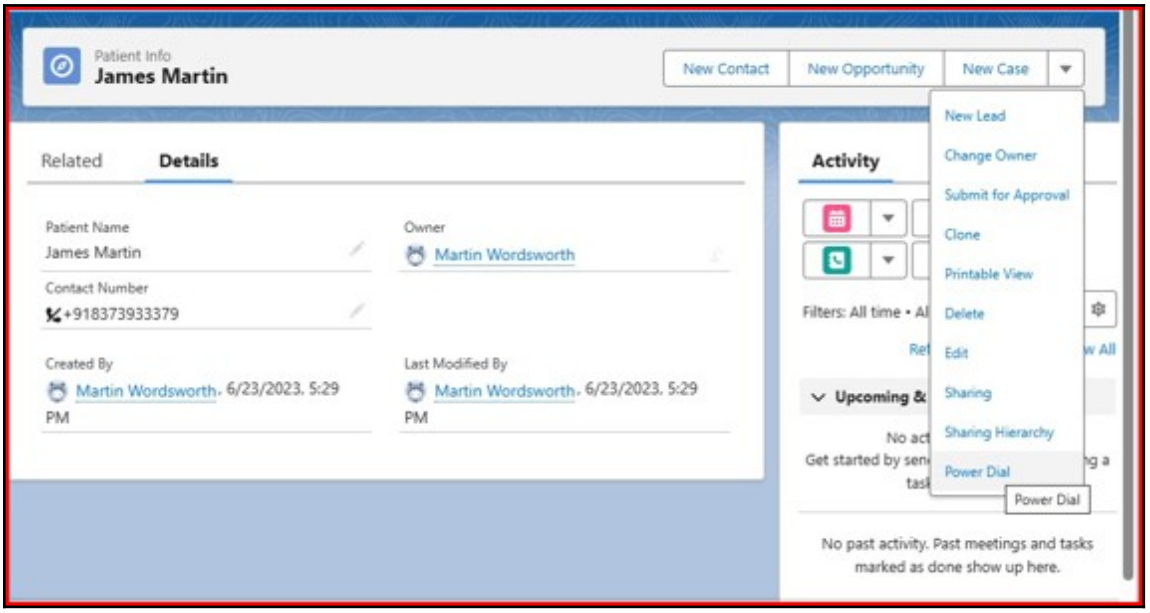


Fig 59 Power Dial on Account Detail Page

Using The Power Dial Functionality

For using Power Dial functionality, we will have to create a Split View of the records of the particular object.

Create a Split View

Follow the following steps to create Split View:

Go to the object tab >> Select any list view >> Click on the table icon >> Select “Split View”

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

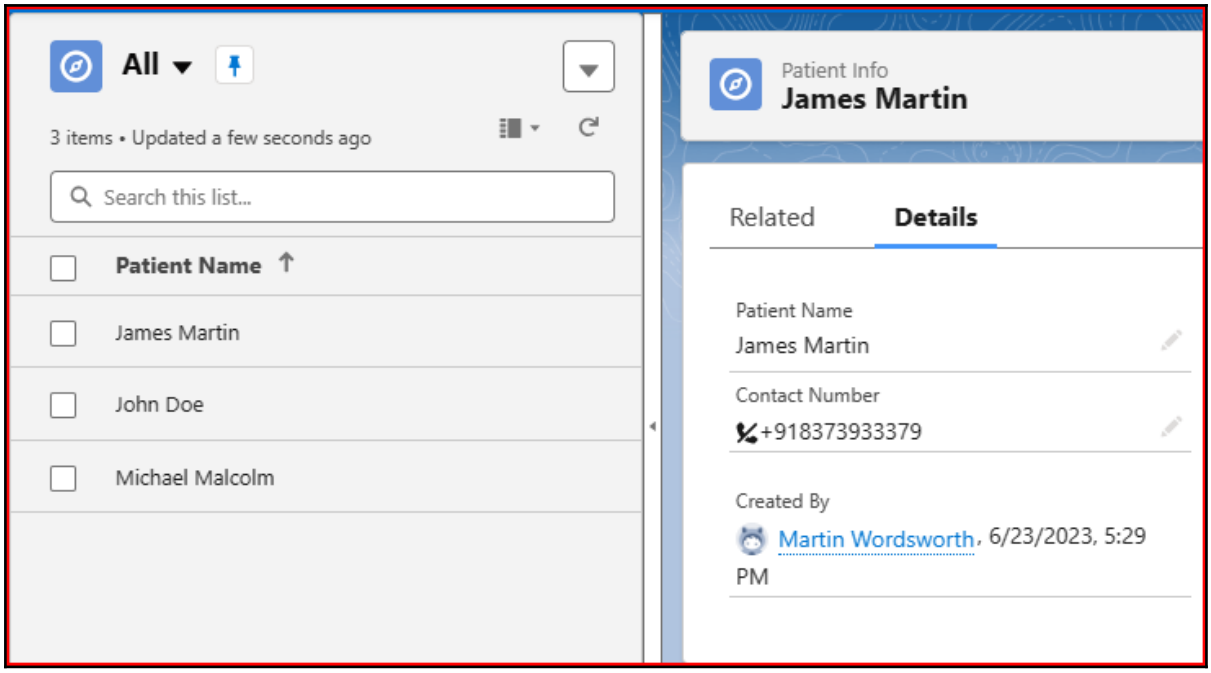


Fig 60 Split View

Note:- There is one limitation here. Even if we select random records from the split view, the Power Dial functionality will work in the serial order of the records in the list view. In order to have the Power Dial to work for a specific set of records, you will need to create a special list view for those records, assign them in split view and then use Power Dial.

For Power Dial functionality to function, follow the following steps:

From the split view, click on any record >> Click on the Power Dial button >> 360 CTI Softphone will open which will connect the call to the first user.



Fig 61: Power Dial on Record Detail Page

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

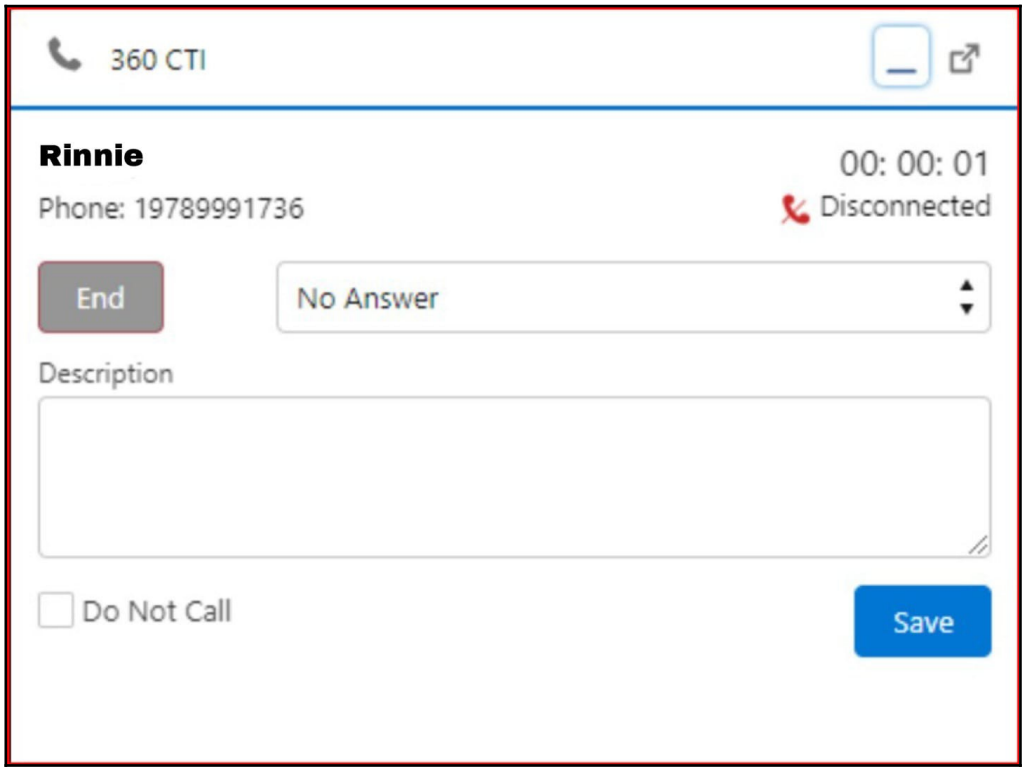


Fig 62: 360 CTI Softphone

After the call ends, it will ask you to either Call, Skip or Break.

> If you want to skip the next number, you can click on Skip.

> Clicking on the Call button will end up calling the next number.

> Clicking on the Break button will end up the calling chain of the functionality.

> When the user reaches the bottom of the dialer list, he is notified accordingly.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

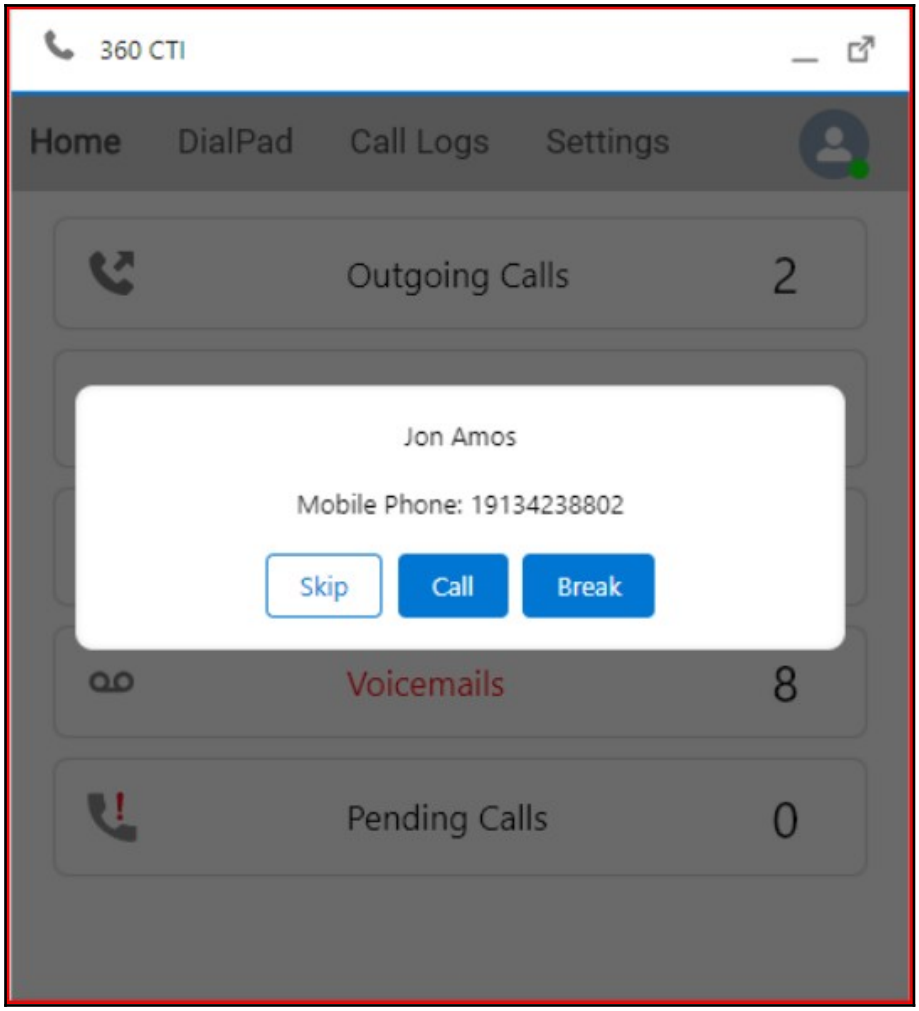


Fig 63 Power Dial Options

Power Dailer Timer

In this feature, User can adjust the interval for automatic calls when utilizing the power dial feature.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

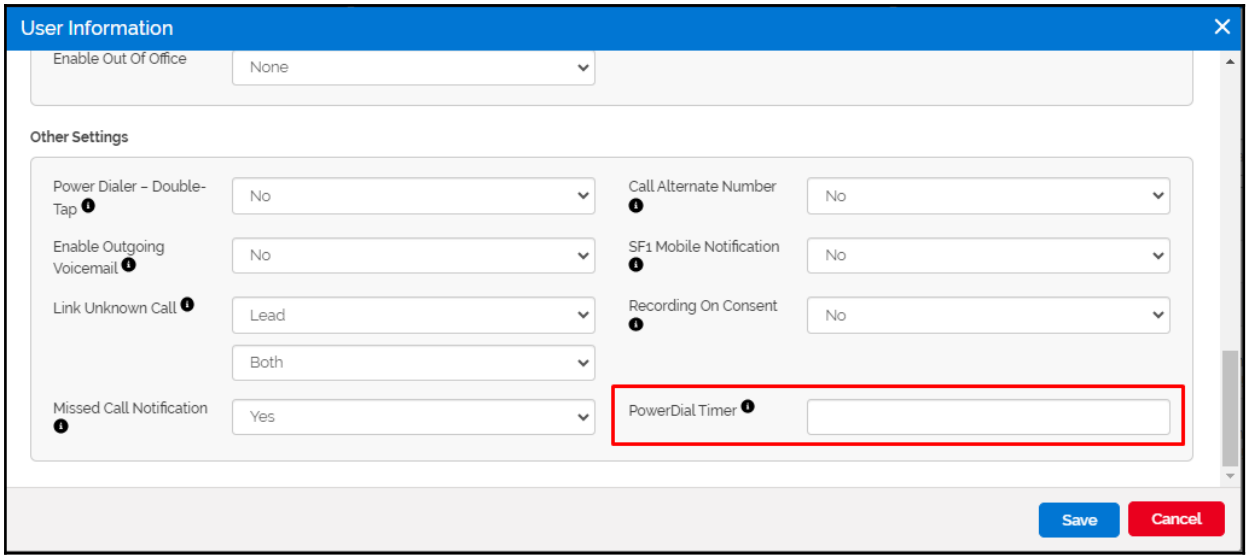


Fig: 64 Power Dialer Timer

Do Not Call Functionality

Use Case

Whenever a particular client user has opted out of the calling functionality, we activate the Do Not Call functionality for the particular user. The Salesforce User won't be able to call the particular end client until the Do Not Call is disabled from their record.

Enable The Do Not Call Functionality

From Record Detail Page

For enabling the Do Not Call functionality, follow the following steps:

Go to the object record detail page >> Check on the Do Not Call checkbox

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

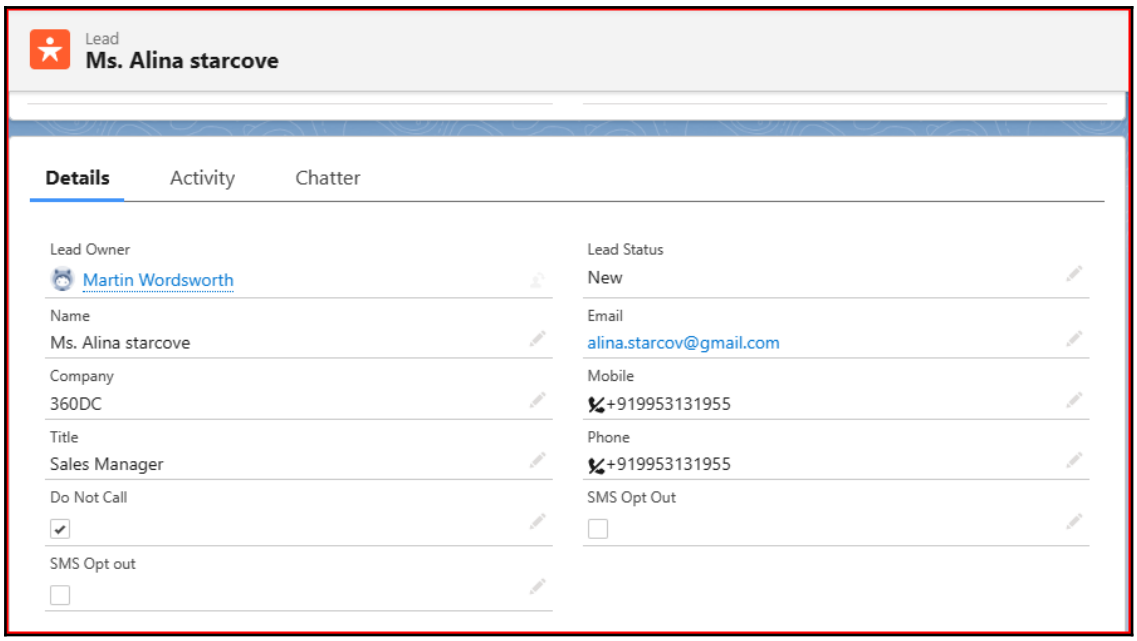


Fig 65: Do Not Call on Record Detail Page

From 360 CTI Softphone

For enabling Do Not Call using 360 CTI Softphone, follow the following steps:

Go to 360 CTI Softphone >> Click on Dial Pad >> Enter the number >> Click on Call Button >> Click on Do Not Call checkbox.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

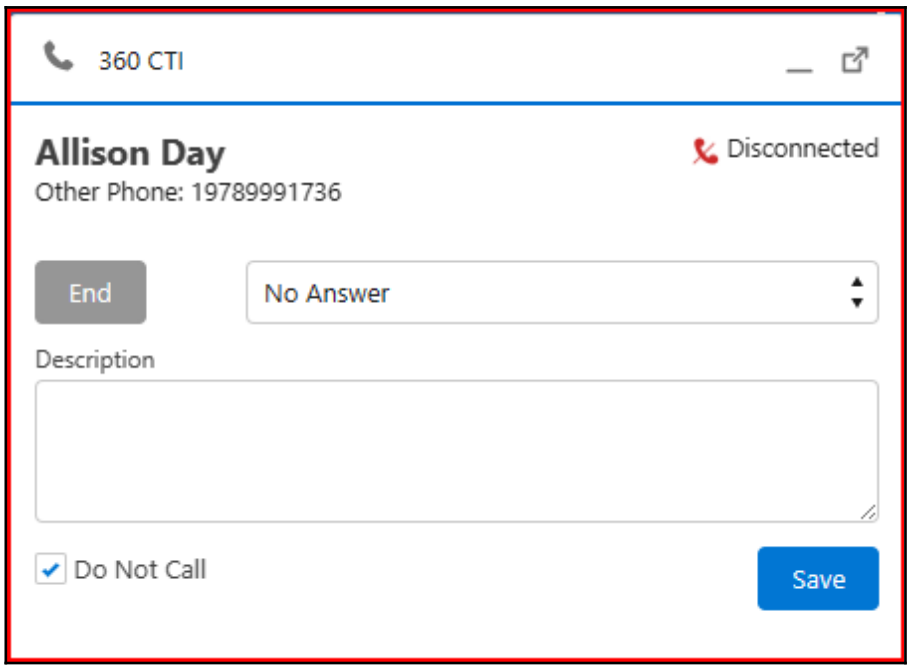


Fig 66: Do Not Call on Softphone

How Do Not Call Is Tracked Now

Checking Do Not Call — from either the record detail page or the Softphone — now creates or updates a record in the CTI Unsubscribe object to capture the opt-out. It no longer sets the Do Not Call checkbox field on the object record itself.

Note : if any of your reports, list views, or automation key off the object record's own Do Not Call checkbox, they will no longer reflect calling-compliance status — check the CTI Unsubscribe object instead. See Compliance Mechanism > Record Wise.

- **Re-enabling a number-** Delete the corresponding CTI Unsubscribe record to allow calling to that number again.
- **Call logging-** Calls blocked because a number is on Do Not Call do not generate call logs or Tasks.

Sticky Caller

Sticky Caller is a feature in CTI that allows a user to maintain a consistent phone number when making outbound calls. This is particularly useful when a user has multiple phone numbers and wants to maintain a consistent relationship with their customers by using the same phone number for each call.

Sticky Caller can help to improve the customer experience by ensuring that the customer recognizes the phone number and the context of the call. It can also help to improve the user's efficiency by eliminating the need to manually selecting the phone number for each call.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

User need to create a field on the desired object with the API name as “Sticky_Caller__c”. You can add this Sticky Caller field anywhere in the record details page.

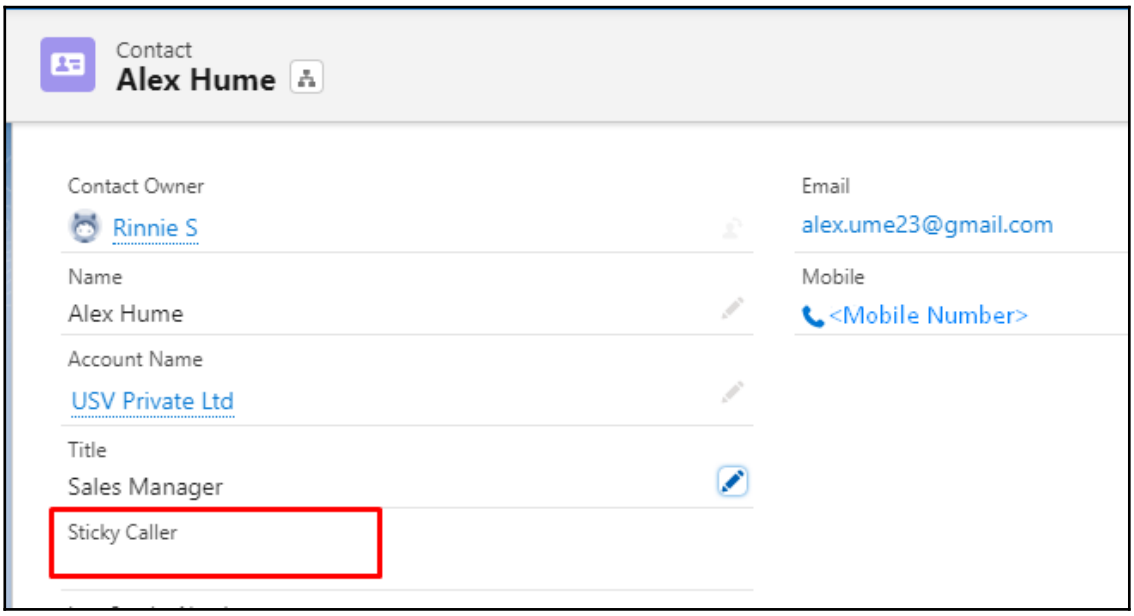


Fig : 67 Sticky Caller

Click to Dial component

To add a Click to Dial component in your org, follow the steps given below:

a. Click on the Settings icon ( ) on the top right corner of the page.

b. Select "Edit Page" from the drop down menu.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

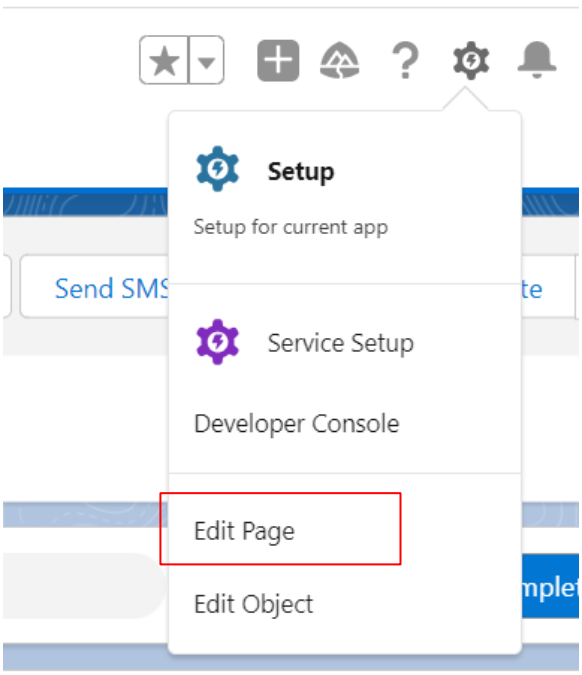


Fig : 68 Edit Page

c. Search for "ClickToDial" in the search bar located under Components (as shown in the image below).

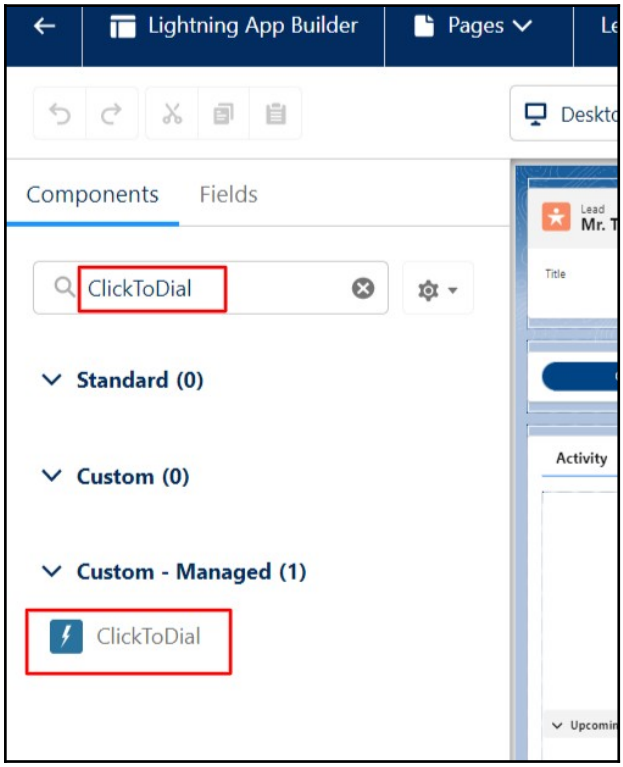


Fig : 69 ClickToDial on search bar

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

d. Drag and drop the ClickToDial component to the desired location on the page.

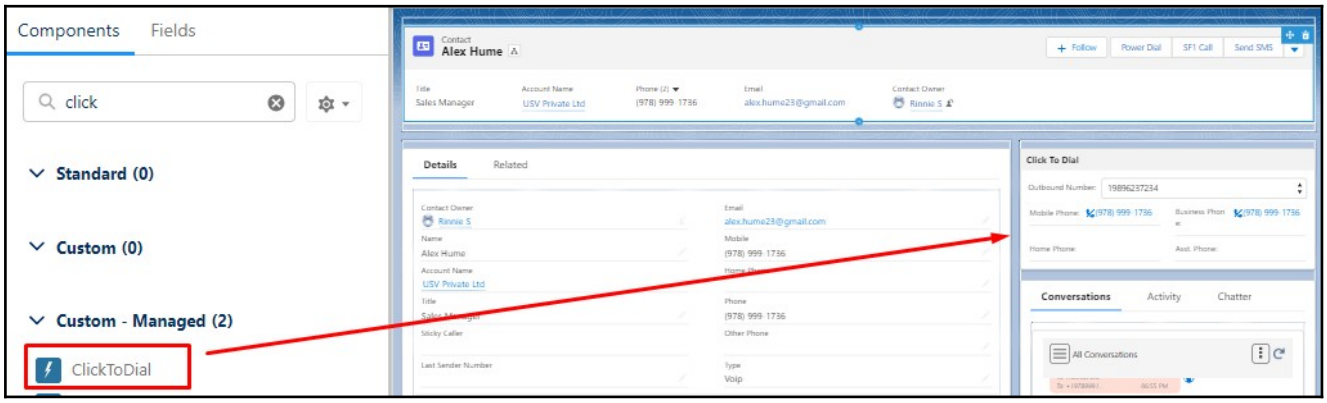


Fig : 70 Drag and drop ClickToDial

e. Click on the "Save" button to save the changes.

Note : the SF1 Mobile App also has its own Click-to-Dial component, available from the same setup path in the mobile app.

Link Unknown Callers

The "Link Unknown Call" functionality within the CTI application serves to create a lead or contact entry in instances of incoming or outgoing calls involving unidentified or unknown numbers. This feature autonomously generates a new lead or contact entry utilizing the respective number. In scenarios where the number lacks an association with an existing lead or contact record, the system generates a fresh lead or contact entry for that specific number. This efficient process guarantees the capture and organization of potential leads or contacts, thereby enriching the comprehensive management of customer relationships.

Functionality- If we get an incoming call from the unknown number, in that case our record will automatically be created as per the selection of the respective object ("Lead" and "Account & Contact.") with fields.

We have two choices: "Lead" and "Account & Contact."

If we choose "Lead," we get three options: "Both," "Incoming," and "Outgoing."

For **"Account & Contact,"** we also have three options: "Both," "Incoming," and "Outgoing."

If we pick "Account & Contact," it means a lead won't be created. Only one thing can be created at a time. The main purpose of this is that whenever a call comes from an unknown number, this function is activated.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Let's say you have a person in charge (Lead), and in the settings for unknown calls, the lead option is chosen for both incoming and outgoing calls. Whichever category you pick for the lead, it will automatically be saved in the chosen respective fields. This happens automatically.

Steps to setup the Unknown Call

Users can setup the Link Unknown call in General Settings and In User Config.

To setup the Link unknown Calls fields in CTI General Settings , follow the below steps:

Navigate to the CTI Setup Tab >> Go to the General Settings >> Click to Edit Button >> Search for Link Unknown Call under Unknown call settings >> Choose the Respective Object and Type (“Both”, “Incoming” and “Outgoing”) >> Set the fields by providing the values” >> Click on “Save” button



Fig : 71 Link Unknown Caller

To setup the Link unknown Calls fields in CTI in User Config, follow the below steps:

Go to the CTI Setup >> In User Config click on Edit >> Navigate to the “Link Unknown Call” >> Choose the Respective Object and Type (“Both”, “Incoming” and “Outgoing”) >> Click to “Save” button

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

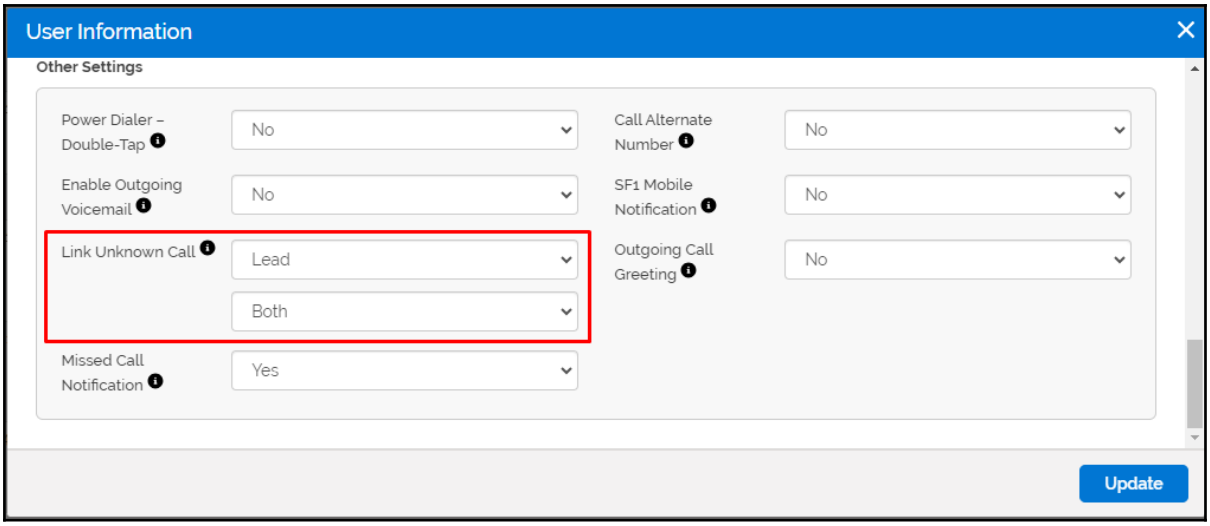


Fig : 72 User Information

Note- In case Link Unknown Call is set in both User Config and General Settings so priority should be given to User Config.

Call Recordings

All of your calls will be recorded and accessible through the task and call logs to ensure that you have a record of all your conversations.

- **Absent recordings-** If your telephony provider marks a recording as Absent on their end, CTI automatically removes it from Salesforce, keeping your recordings list accurate.
- **Call Disconnected By-** On the Call Log, this field tracks which user intentionally rejected an incoming call using the standard Reject button (Reject as Voicemail is not tracked here).

Call Monitoring:

Call Monitoring is a tool that enables authorized users, (such as managers and supervisors) to listen in on live phone calls between customer service representatives and clients.

For Call Monitoring, we need to create the Tab. Below are the steps to create the Tab.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

To create the Tab, follow the below steps:

Navigate to the Gear Icon >> Click on “CTI Setup” >> Search for Tabs in Quick find box >> Create Custom Object in Lightning Component Tabs >> Click to “New” >> Select 360 CTI Call Monitoring in Lightning Component >> Click Next >> Click to Save>>Tab will be created.

To assign the Call Monitoring Tab in the Navigation Bar, follow the below steps:

Click on Edit option in Navigation Bar >> Add more items >> Click on All >> Call Monitoring >> Add one new Item >> Click on Save >> The Tab will be added on the Navigation Bar.

Features of Call Monitoring Action Tab -

User Status Details: A new section has been added that provides real-time updates on the current status of team members, including whether they are online, offline, on a call, or away.

1. **Listen** - With the help of this feature, managers or supervisors can listen in on client and customer support calls. The agents or clients won't be aware of their existence as they can listen in.

2. **Join** - Supervisors or experts can join a call that is already in progress between an agent and a client by using the Join function. This enables them to quickly intervene in complex situations and offer support or a settlement.

3. **Call Whisper:** Managers can now whisper into ongoing calls between agents and customers, allowing them to guide agents without the customer hearing. This feature helps in real-time coaching without disrupting customer interaction.

Prerequisites

- Users should be assigned a number from the CTI Setup.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

- A 360 CTI license should be assigned and the user must be a agent on the 360 CTI server.

Business Use case

For Call centers - Businesses can oversee and monitor their call center activities using the call monitoring tool, which can play a crucial role in addressing customer complaints by supplying valuable evidence.

Note - With this functionality, you can monitor one call at a time, and it displays only the live calls in which customers and agents are actively engaging with each other.

- **On-Hold visibility-** Call Monitoring also shows customers who are currently on hold.
- **Grant Additional Access-** By default, a manager sees only their own team's ongoing calls and status, while an admin sees everyone. In General Settings, an admin can grant specific users or profiles exception access beyond their normal role-hierarchy visibility.

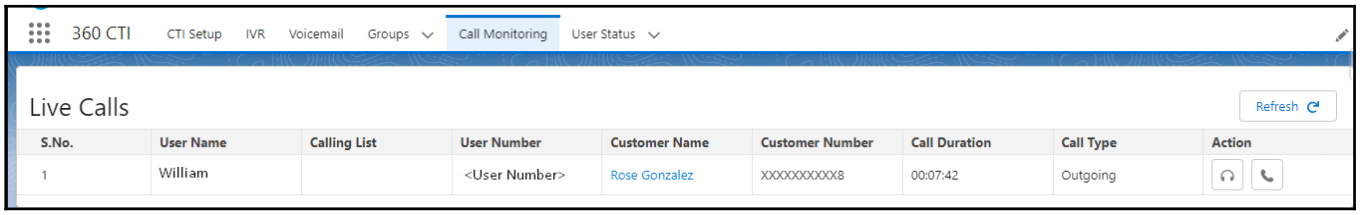


Fig: 73 Call Monitoring

Voicemail

In the Voicemail tab, users can access call recordings and configure their voicemails. They can either upload a Voicemail audio file or record their own voicemail message.

Note : You can Upload audio up to 60 seconds and Record audio up to 30 seconds.

Enable User-Based Voicemail

By default, anyone who can edit a record can see and select any recording in that record's voicemail dropdown. Turning on Enable User-Based Voicemail in General Settings changes this: each user then only sees their own recordings in the

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

dropdown — on the Voicemail tab, User Config, IVR, Call Routing, Calling List, Voice Broadcast, Outbound IVR, and the Voicemail button in the Softphone.

- **Shared records-** If a record already has someone else's recording selected — including records shared through a Salesforce Queue — the recording name still shows, but only its owner can play it.
- **Replacing a recording-** Anyone with access to the record can replace that recording with one of their own; once they do, only their own recordings are selectable on that record going forward.

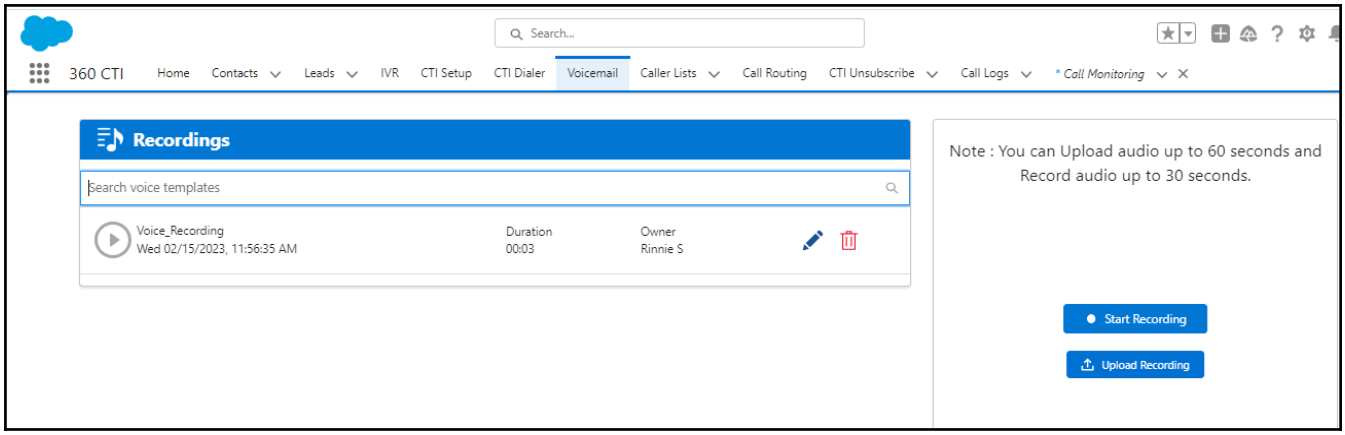


Fig: 74 Voicemail

IVR (Interactive Voice Response)

IVR stands for Interactive Voice Response. IVR is a technology that allows a computer system to interact with humans through the use of voice and DTMF (Dual-Tone Multi-Frequency) tones entered via a keypad. It is commonly used in telephony systems to automate interactions with callers, gather information from them, and route calls to the appropriate destination without the need for human intervention.

To access the IVR. User need to go to the IVR tab in 360 CTI app, and select the number for the same.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

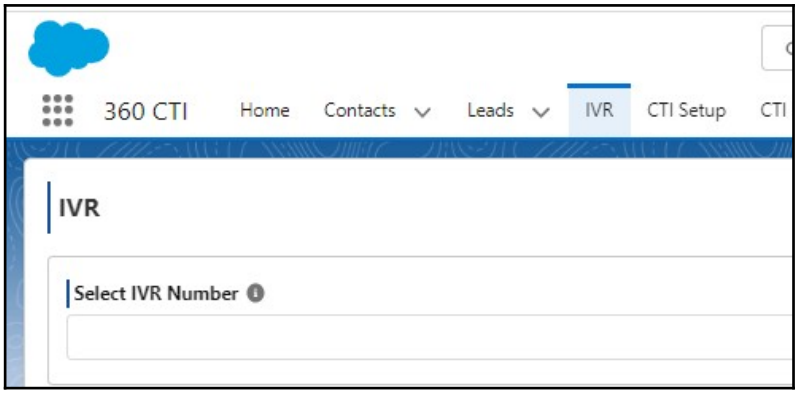


Fig: 75 Select number for IVR

User can set the various options in IVR (as shown in figure):

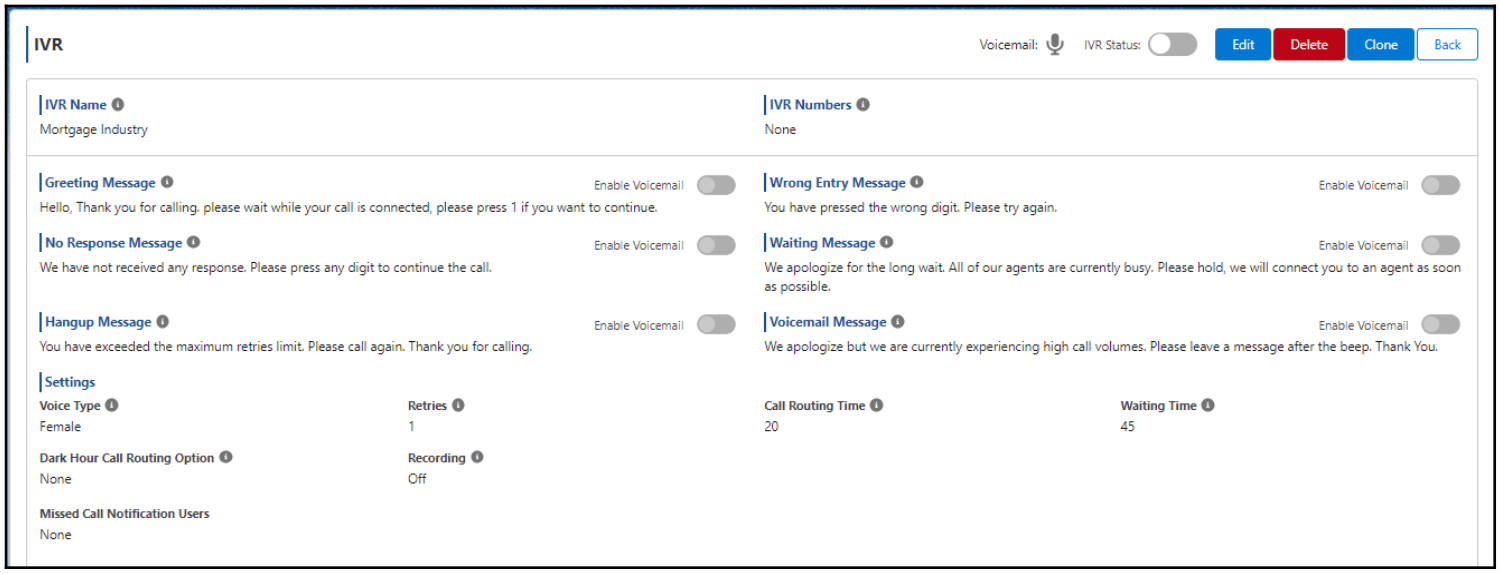


Fig: 76 Options in IVR

User can also add IVR entries as per their requirement (as shown in figure):

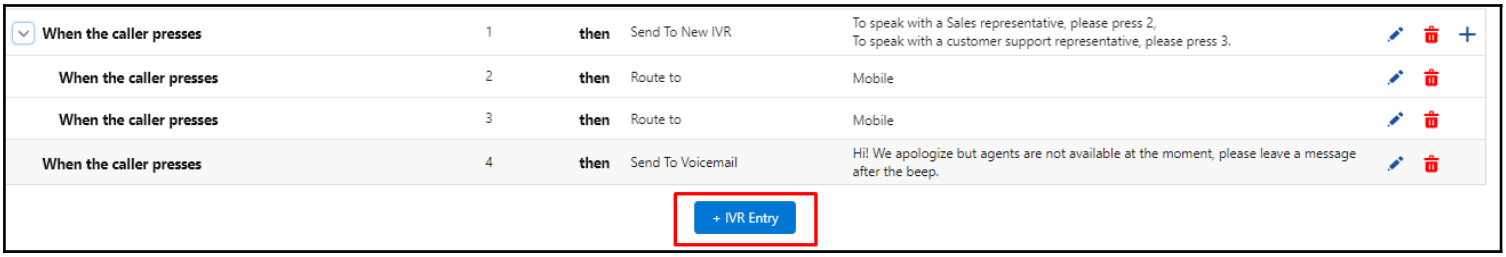


Fig : 77 IVR Entries

Note- The number that will be used for IVR should not be used for any other purpose.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

- **Route To – Omnichannel-** Selecting Omnichannel in the Route To step shows the Queues configured for Omni-Channel routing. The call routes per your Omni-Channel configuration, and once an agent accepts the work item, it rings in the CTI Softphone. If no Omni-Channel user answers, the flow moves to the next routing step.

Call Routing

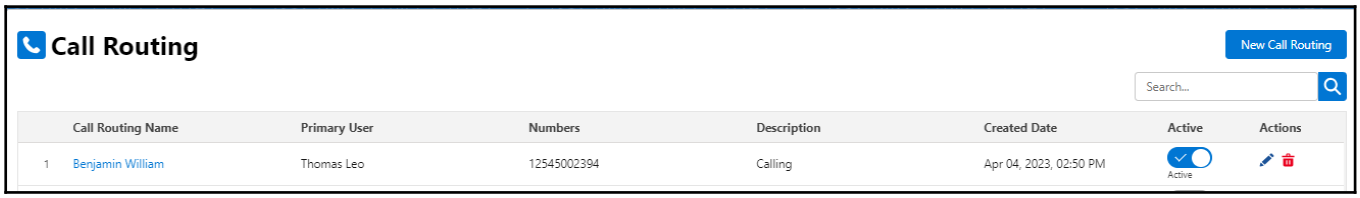
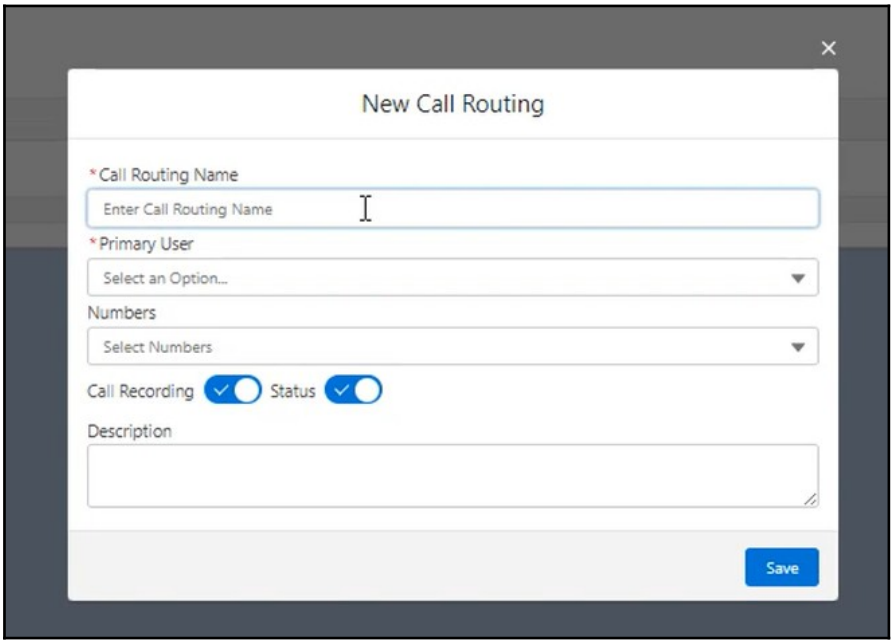


Fig: 78 Call Routing

Basic information is given on the call routing screen like name, number description, etc and it also gives you edit option.

- You can create new call routing simply by clicking on the “New Call Routing” button.

- After feeding in the necessary details, you can also set the call routing for multiple numbers.



Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Fig: 79 Call Routing for multiple numbers

Recording on Consent

Provides the ability to start or stop recording during a call, based on the customer's consent. This is useful for complying with legal requirements and managing sensitive information. Implemented a mechanism to pause and resume call recording based on agent or customer input.

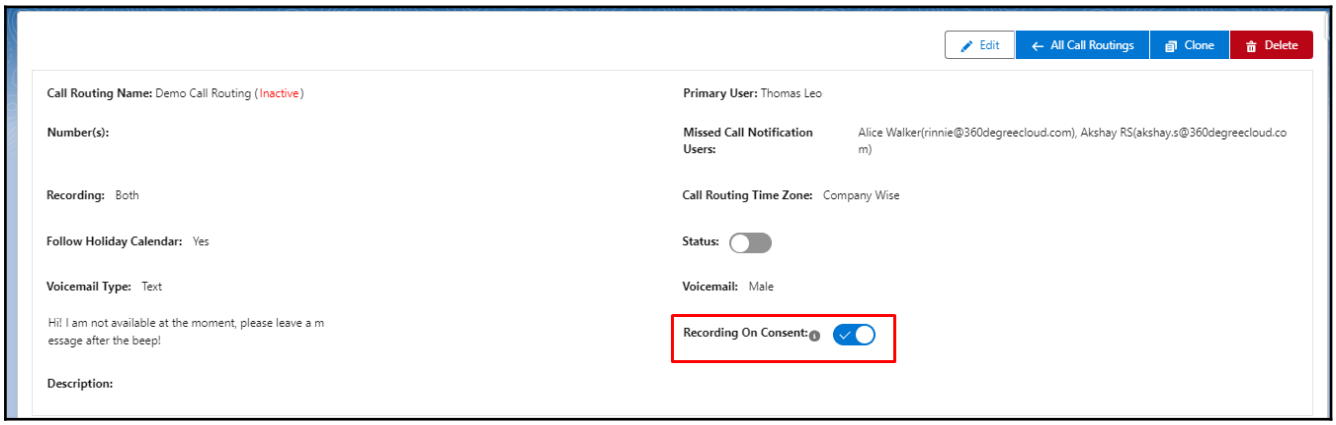


Fig:80 Recording on Concent feature in Call Routing

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

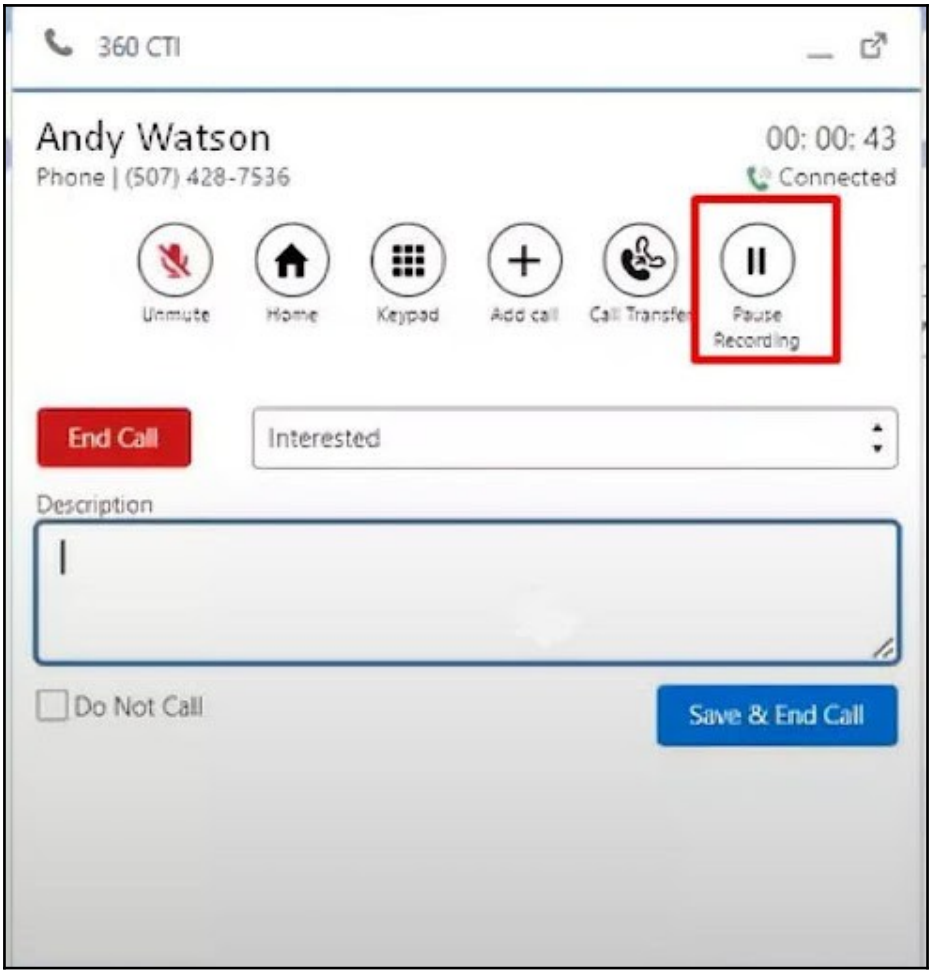


Fig: 81 Resume Recording button

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.



Fig:82 Pause Recording Button

Call Routing within IVR

The ability to transfer or route calls from one call routing step to another, enabling more complex call flow configurations.

Follow Holiday Calendar

Automatically direct calls to a custom voicemail or message during holidays based on the Salesforce holiday calendar.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

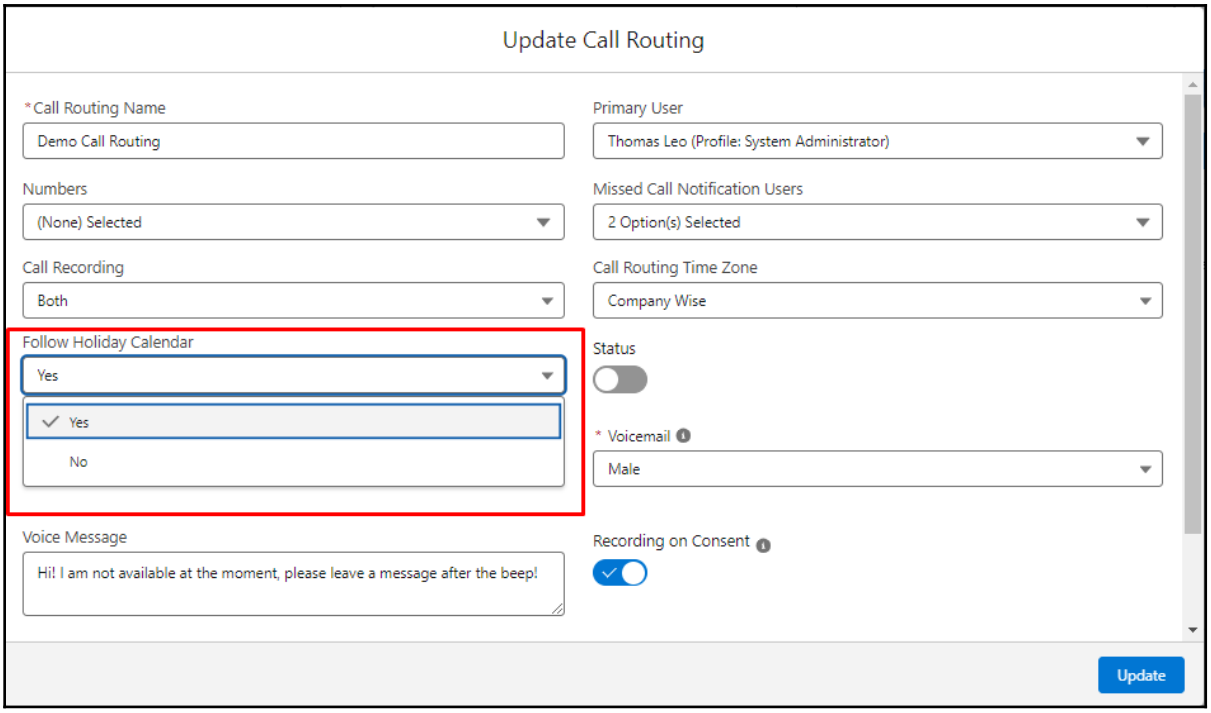


Fig: 83 Follow Holiday Calender feature in Call Routing

Different features of call routing:

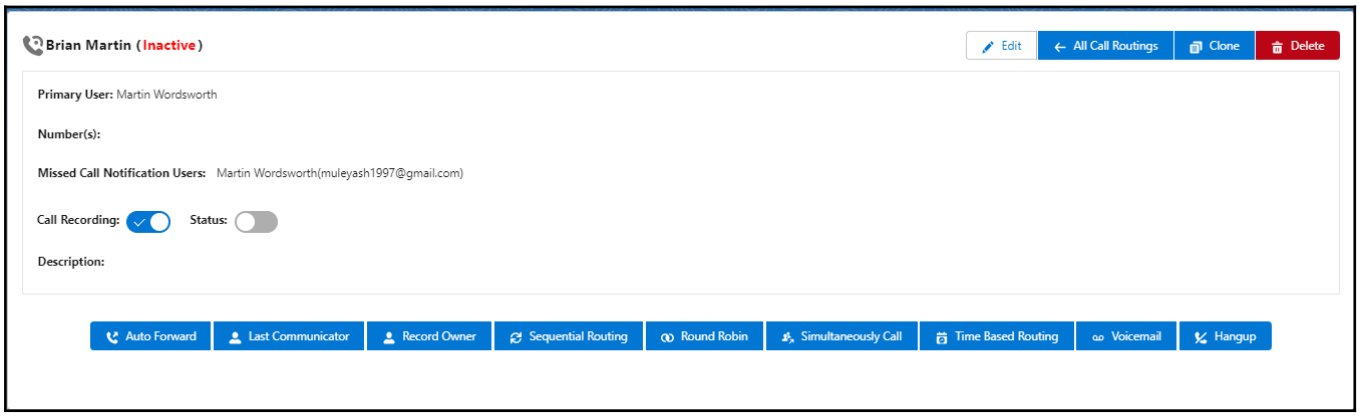


Fig: 84 Features of Call Routing

- **Auto Forward:**

  Lets you forward calls to other users or you can type in the number you want the calls forwarded to.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

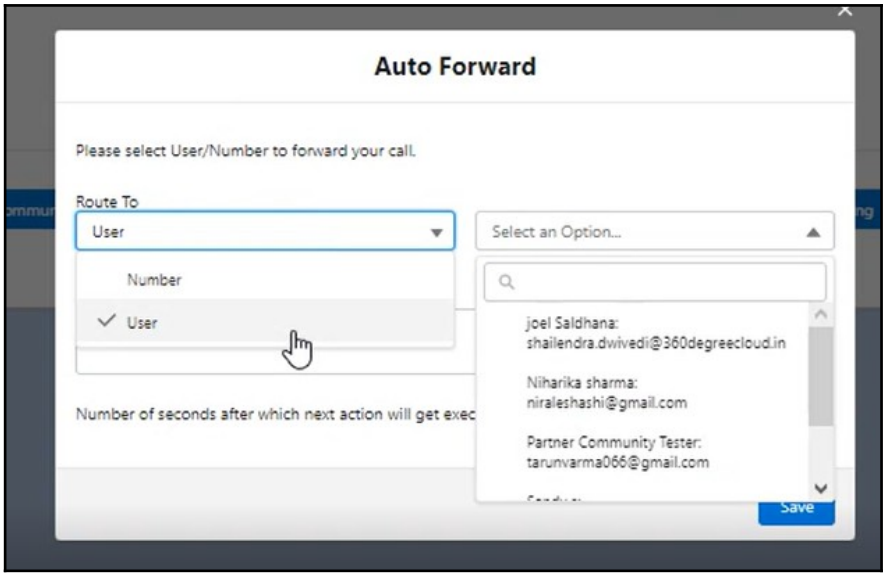


Fig: 85 Auto Forward

- **Omnichannel option-** Auto Forward can also route through Salesforce Omni-Channel: select Omnichannel, then choose the Queue configured for Omni-Channel routing. The call routes per your Omni-Channel setup and rings in the CTI Softphone once an agent accepts the work item; if no Omni-Channel user answers, the next routing step runs.

- Last Communicator:

The system can auto route the call, if instructed, to the last executive the customer talked to.

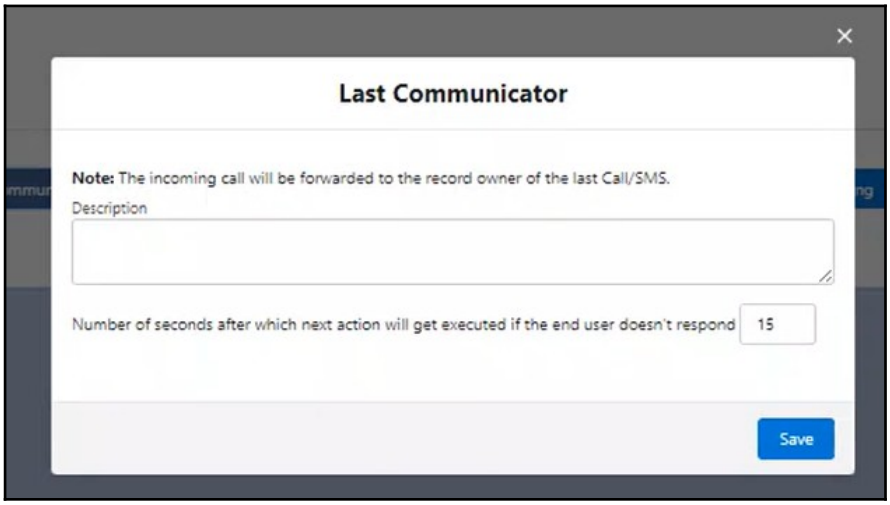


Fig:86 Last Communicator

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

- **Record Owner:**

The call can be routed to the record owner (the contact owner).

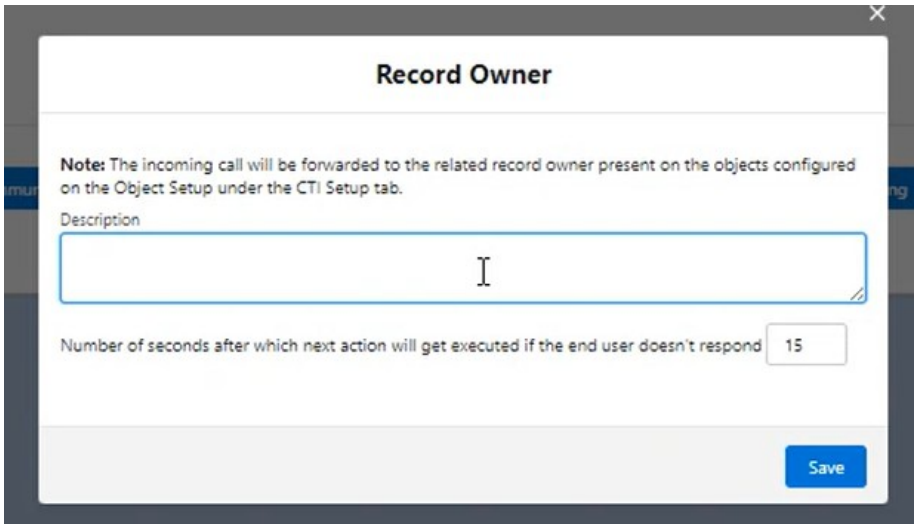


Fig: 87 Record Owner

- **Round Robin:**

Lets you route your call to a group of people (queue), you can select the queue and number of seconds as to how long the call will ring for a particular agent.

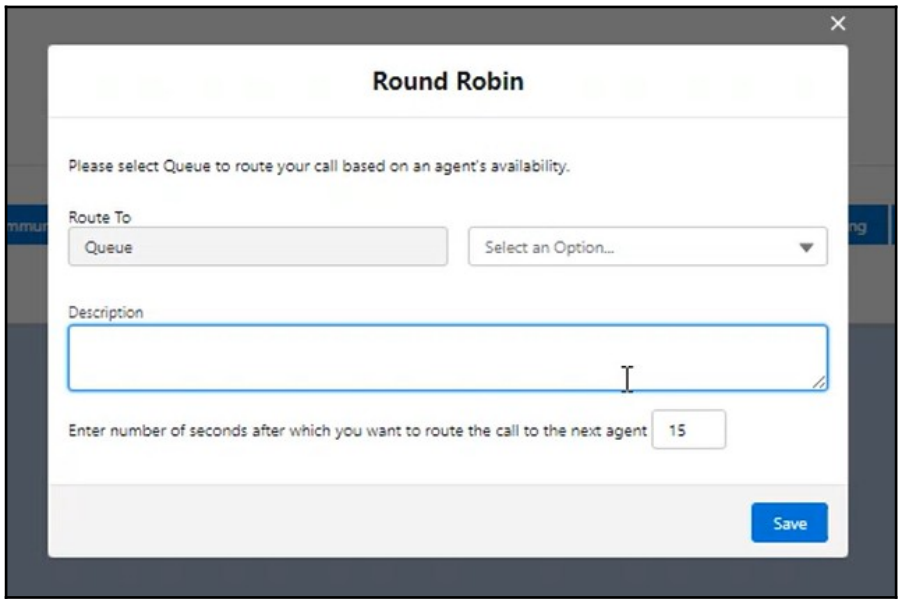


Fig:88 Round Robin

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

- **Simultaneously Call:**

  Every agent will receive the call at the same time and whoever attends the call, the task will be assigned to them. You can simultaneously call:

  a. User
  b. Number
  c. Queue
  d. User & User (Mobile)
  e. Or any combination of the above three.

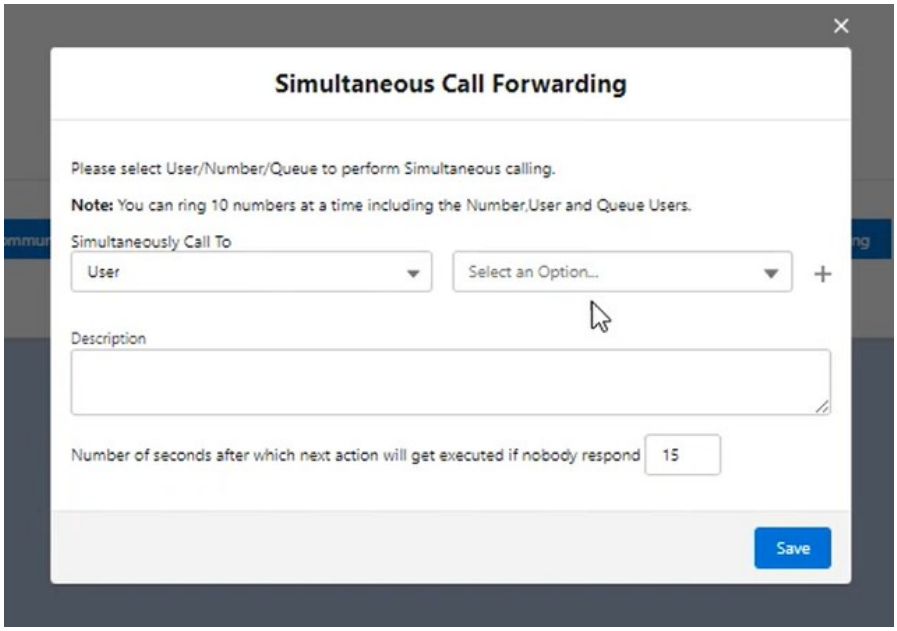


Fig: 89 Simultaneous Call Forwarding

- **Time Based Routing:**

  You can control the calls based on days/time. You can select weekdays, weekends, anyday or basically any combination that you like. The follow up can also be set for 24 hours or for a set period of time.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

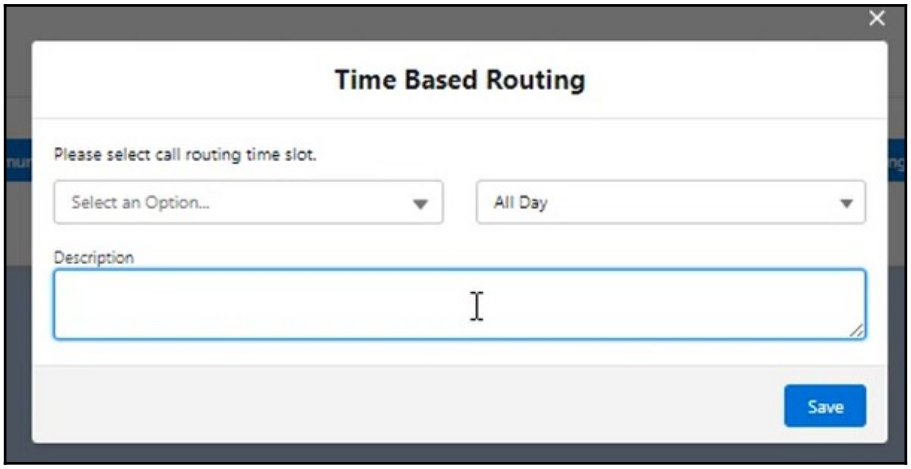


Fig: 90 Time Based Routing

- **Voicemail**:

Two types of voicemail:

a. Text
b. Voice

Two types of voice:

a. Male
b. Female

You can also have voicemail recorded in your own voice.

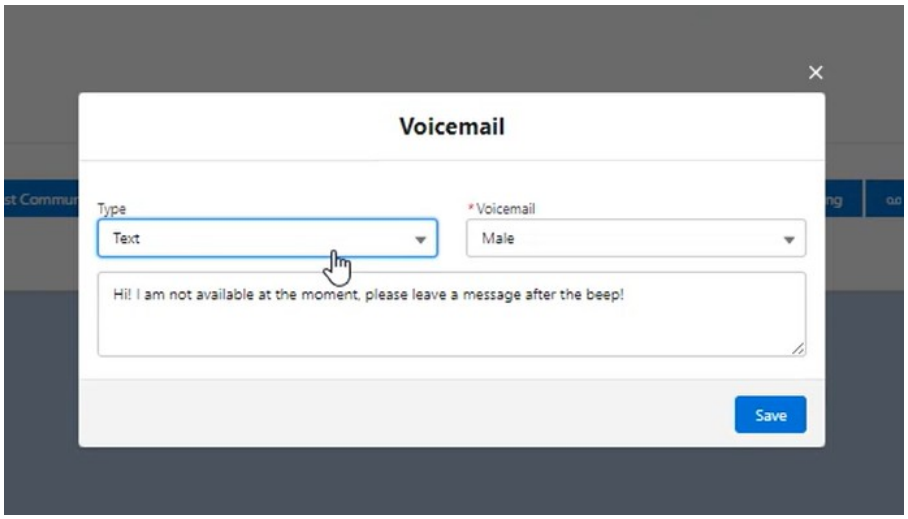


Fig: 91 Voicemail

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

B. Hangup:

Disconnecting the call.

Voice Agent

Hand the call to an AI Voice Agent built in Voice Agent Setup (see the Voice Agent Setup section later in this guide). The agent can hold a natural conversation, look up or update records, and route the call to a live agent when needed. Language and voice for the agent are set once in Voice Agent Setup, not per routing step.

CTI Unsubscribe

In this tab, records that have opted out are displayed (as shown in figure):

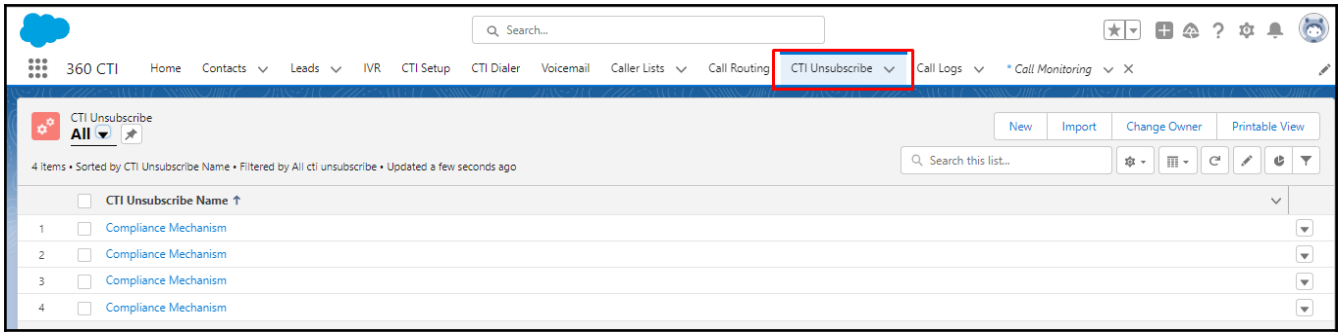


Fig: 92 CTI Unsubscribe

Call Transcript, Call Coaching & AI Insights

The Call Transcript feature has been introduced, allowing entire conversations to be converted into text format and stored in the 'Call Transcript' field within the Call Log Lookup field. If a call is lengthy, the transcript will be stored in the File record associated with the Call Log record. Furthermore, sentimental analysis of the call is conducted, and the information is stored in the 'Call Sentiments' field within the Call Log Lookup field. Additionally, a Minutes of Meeting (MOM) summarizing the entire call is generated and stored in the 'MOM (Minutes of Meeting)' field within the Call Log Lookup field.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Note: To enable this feature please connect with the 360 Support Team.

Live Call Transcript in the Softphone

Live transcription now lives inside the Softphone itself, not as a component on the record page (the option to add it to record pages has been removed). It only appears if an OpenAI Key is set in AI Settings — leave that field blank and the Live Transcript panel won't show.

Multi-Language Transcripts for Call Monitoring

Set Transcript Preferred Language on your My CTI Setup page, and the live transcript displays in that language whenever you use Call Monitoring – Listen. This applies only to Listen mode — not to your own normal calls or other Call Monitoring actions.

AI Credit Status

The AI Credit Status field on a call's transcript only appears when something needs attention — an expired API key or exhausted AI credits/quota — rather than showing all the time.

Note : if you recharge AI credits after a quota expiry, click Sync Transcription on the call record to pull in the updated transcript.

Call Insights

Call Insights adds AI-generated coaching suggestions to the post-call transcript, based on the Call Insights Instructions field in AI Settings. Default instructions are included on install and upgrade; clearing the field turns Call Insights off.

Call Score

Call Score rates a call from 1–100 based on the Call Score Instructions field in AI Settings (default instructions included; edit or clear to change the criteria). A user's average Call Score is recalculated daily and shown on their My CTI Setup page — they need to open My CTI Setup, click Edit, then Save once for it to start appearing in Reports. Call Score requires Post Call Transcript to be enabled.

Call Coaching

Call Coaching surfaces AI-generated feedback on the Softphone's Call Coaching tab, working alongside Call Monitoring's Listen, Join, and Call Whisper features.

- **Auto vs. Manual-** Auto generates insights for every call; Manual lets a supervisor request coaching for one specific call. In Manual mode, if no Agentforce agent is available, the Softphone shows “No agents are currently available.”

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

- **Default Voice Agent for Call Coaching-** Set in AI Settings; this agent appears by default on the Call Coaching tab.
- **Off-Topic filtering-** Configure Off-Topic Instructions in AI Settings to exclude small talk (Hi, Hello, Thank you, etc.) from what's sent for coaching, so insights stay focused on the substantive part of the call.

Reports

- **Post Call Insights Report-** Per-call Disposition, Call Keywords, Call Score, Engagement Score, Weighted Score, Sentiment Score, Intent, Sub Intent, Talk Time %, and Action Items.
- **Overall Call Score By User-** Each user's average Call Score. A user only appears here after visiting My CTI Setup and clicking Edit, then Save at least once.

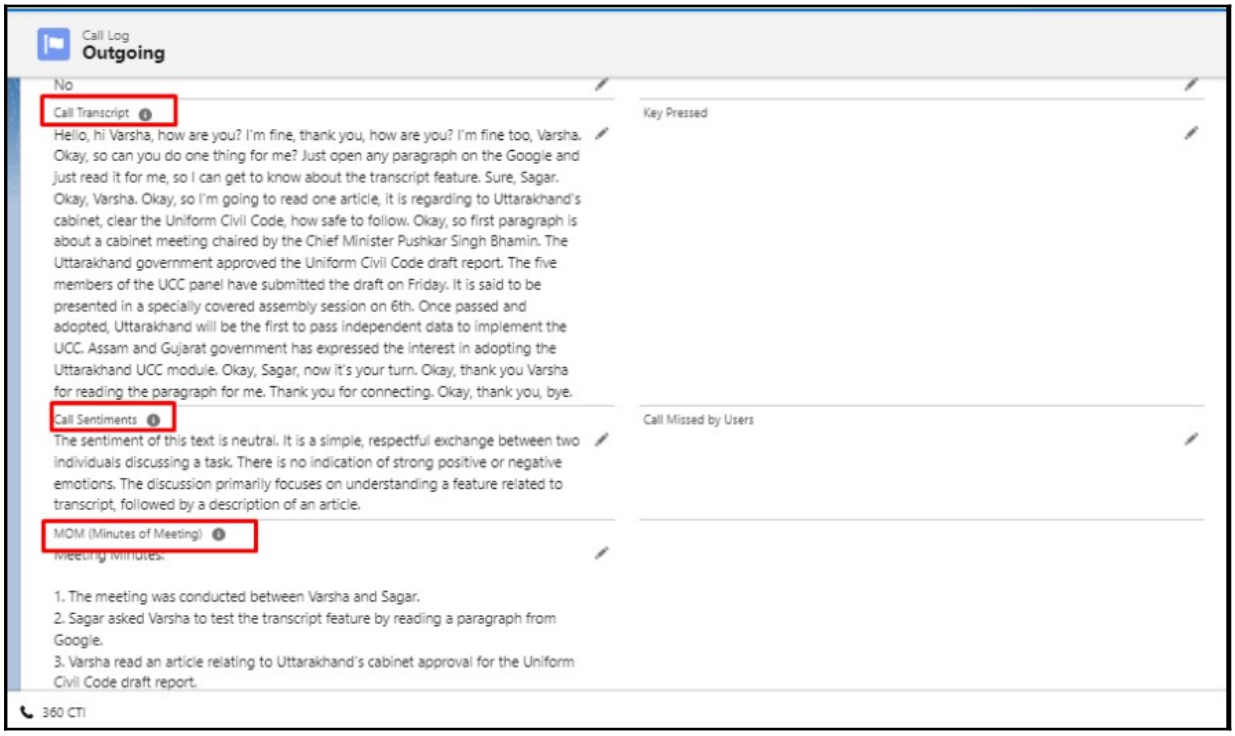


Fig- 93 Call transcript

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Calling List

Calling Lists

Creating a Calling List:

Custom List View: Begin by creating a custom list view with filters that meet your requirements.

Select Records: You can create a calling list by selecting specific records or all records within the list view.

Name Your List: Define a name for easy identification (e.g., "Demo List").

Call From Field: Choose numbers that are accessible to the user or use the Sticky Caller option for dynamic number assignment.

Sticky Caller Option:

This feature allows the call to be processed based on a dynamically assigned number, improving the efficiency and flexibility of the calling process.

Assigning Users or Queues:

You can assign the calling list to specific users or groups (queues). The system ensures that users can only access records for which they have the required permissions.

Ring Agent First:

If enabled, the call will connect to the agent’s softphone before reaching the customer. If set to "No," calls will directly connect to the customer.

Calling List Status:

You can toggle between Active and Inactive status for the calling list, depending on your operational needs.

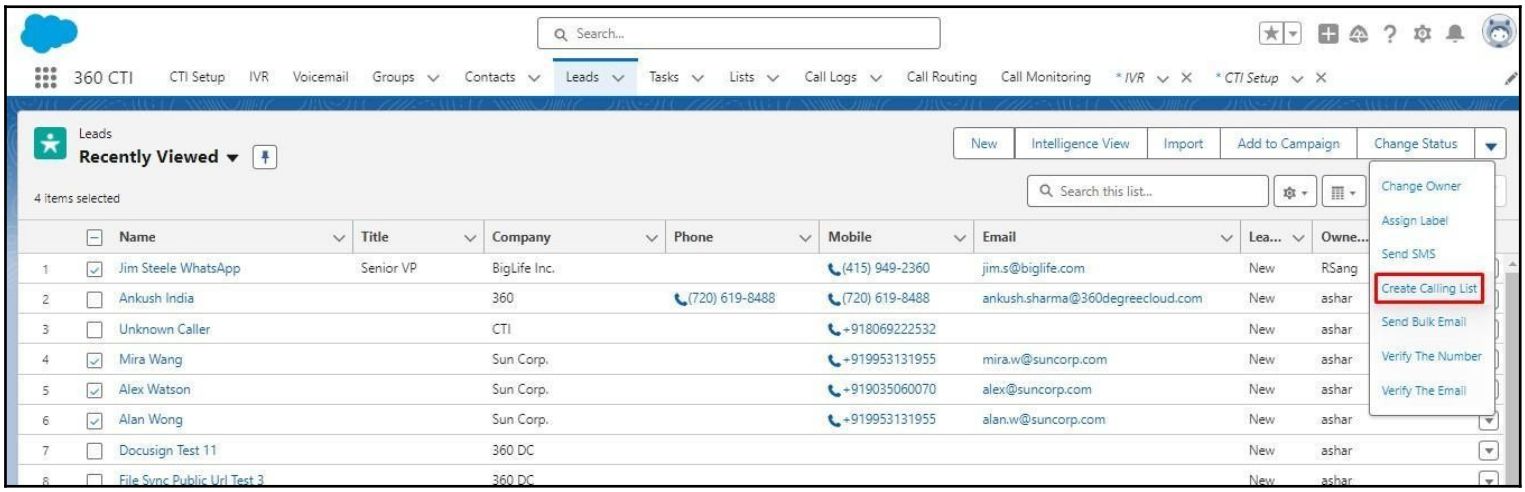


Fig: 94 Create Calling List from List View of respective Object

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

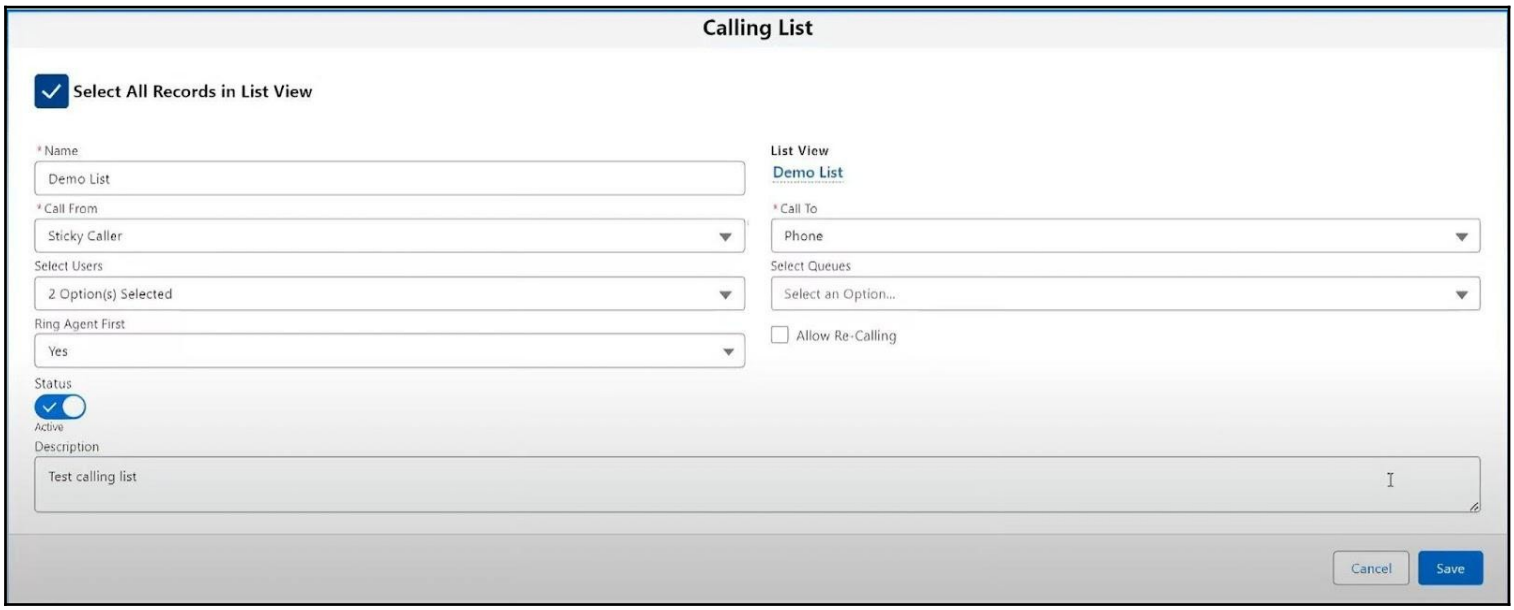


Fig: 95 Calling List Screen

- Supports large datasets with no limitations on the number of records, unlike traditional list views.
- To enable the calling list feature, navigate to general settings and set the "Enable Calling List" option to "Yes." This will allow access to the feature in the softphone settings tab.
-

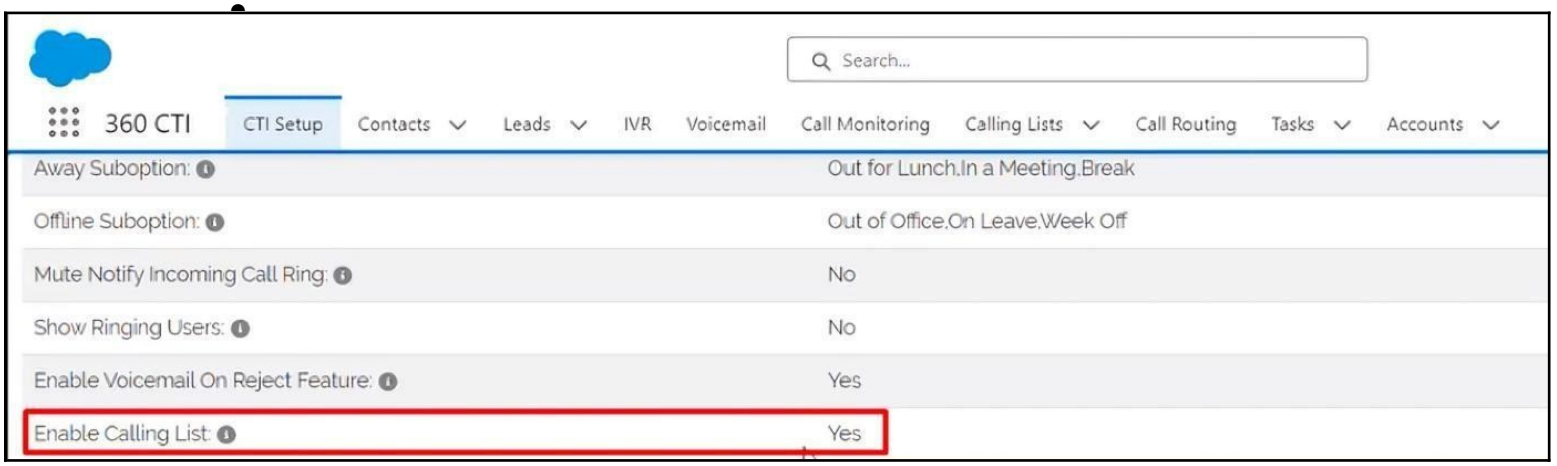


Fig: 96 Enable Calling list feature in General Settings

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Predictive Dialer

Predictive Dialer is a calling mode for Calling Lists that automatically places multiple simultaneous calls and connects the first one a customer answers to an available agent, cutting agent idle time between calls.

To enable Predictive Dialer, follow the below steps:

Navigate to CTI General Settings >> Enable the Predictive Dialer setting >> Open (or create) a Calling List >> The Predictive Dialer fields appear on the Calling List Detail page

- **Concurrent Calls-** Sets how many customer numbers are dialed at once during each cycle.
- **Enable Callback: No-** Calls go out to multiple customers at once; once one answers and an agent is free, that call connects to the agent and any other still-ringing calls are dropped.
- **Enable Callback: Yes-** Calls go out to multiple customers at once; once one customer answers, the others keep ringing. If a second customer answers while waiting, they hear an Agent Unavailable message instead of being connected or dropped.
- **Live Call Monitor-** A component on the Calling List Detail page (Predictive Dialer lists only) showing active customer connections and each record's live status in real time.
- **Predictive Dialer Call Status-** A field on the Call Log tab showing the dialer-specific status of each call.

Note : two limitations to keep in mind — (1) some virtual/VoIP numbers (e.g. Google Voice) may report a call as Connected as soon as it starts ringing on the agent's side, before the customer actually answers; (2) Predictive Dialer doesn't yet distinguish a human answer from voicemail, so a call reaching voicemail can still connect to an available agent, and the voicemail greeting may already be playing when they pick up.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Handling Multiple Users and Sessions

Multiple Users:

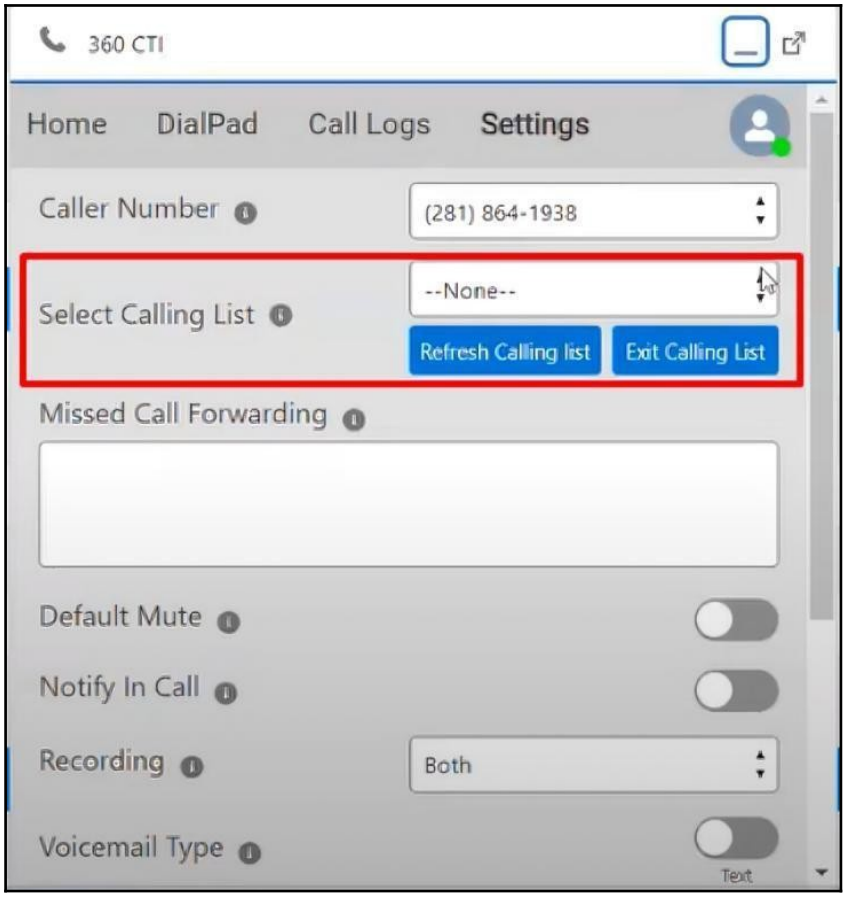
A calling list can be used by multiple users simultaneously. The system ensures that records are evenly distributed and that each user works on unique records.

If one user goes on a break, the system intelligently picks up where they left off while allowing other users to continue making calls.

Pause and Resume:

Users can pause their calling session by selecting Exit Calling List. Upon resuming, the system will automatically continue from where the calling list was paused.

- **Stays active if you close the tab-** A calling list session remains active even if you close the browser tab that started it; reopening the calling list resumes where you left off.



Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Fig: 97 Calling list feature in CTI Softphone

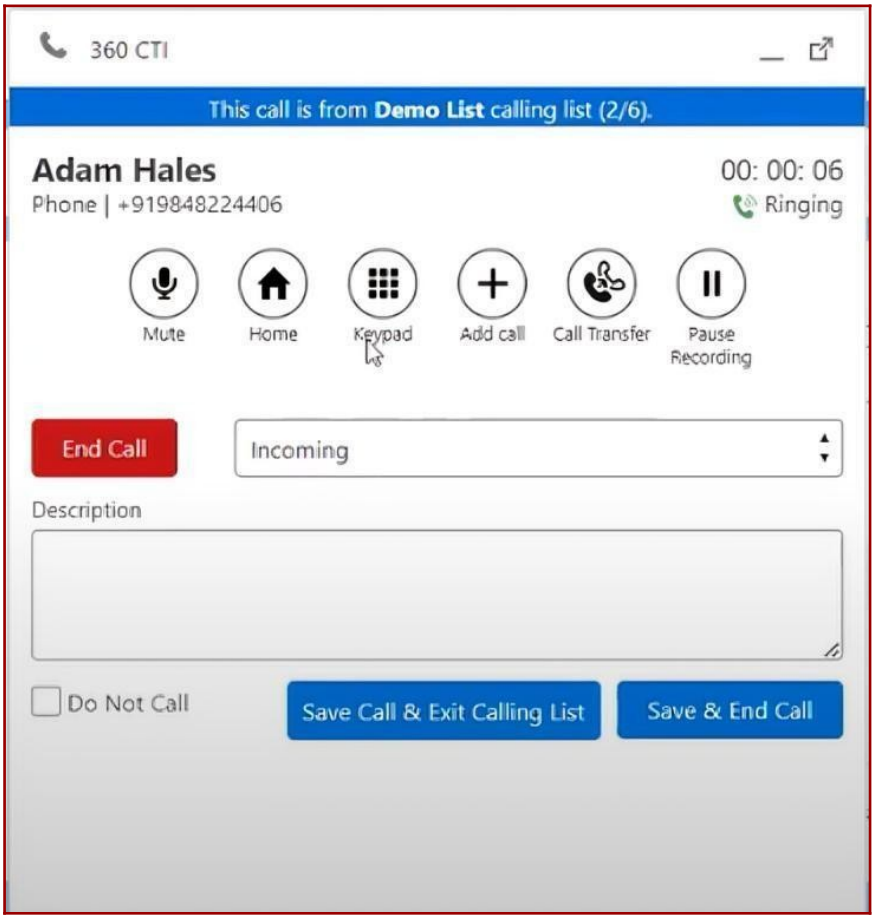


Fig: 98 Calling List started in SoftPhone

Managing and Syncing Lists

Syncing with List View:

If you modify filters after creating the calling list, use the Sync Calling List button to update the list with new records based on the latest filters.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Refresh Button: Refreshes the list to reflect any real-time changes in records.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

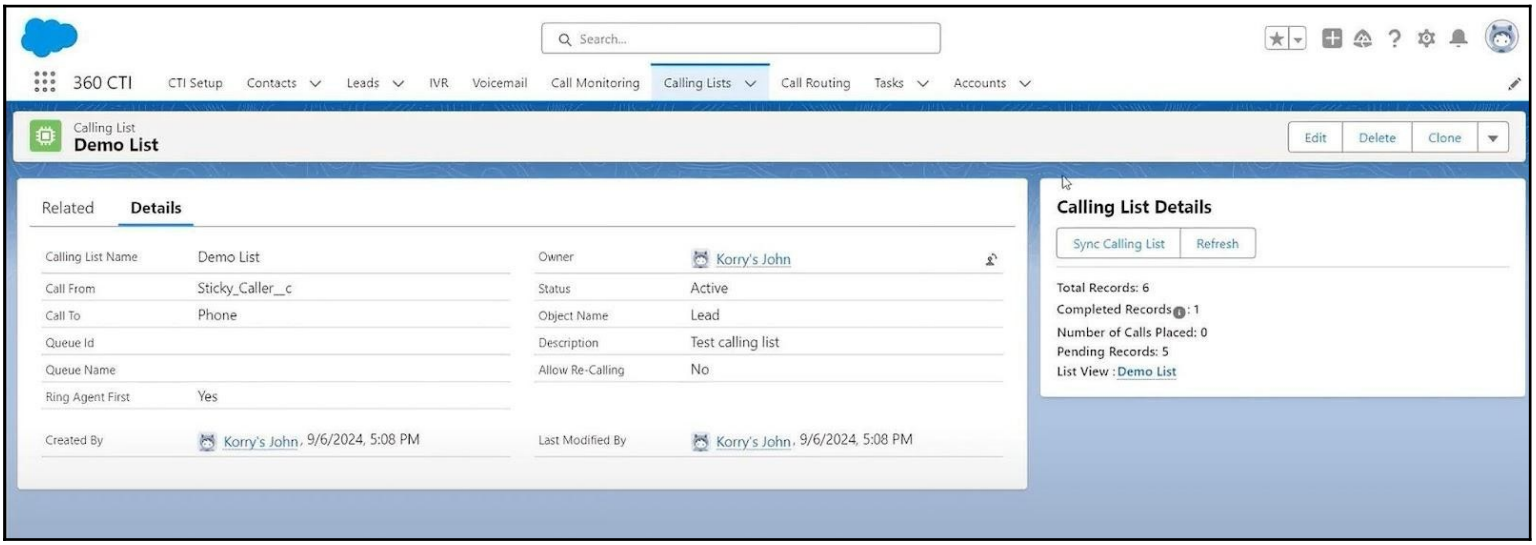


Fig: 99 Calling List details- Sync Calling List and Refresh Calling

Tracking Calls:

Key metrics like total records, completed records, pending calls, and number of calls placed are clearly displayed. This helps in monitoring the progress of the calling session.

Advanced Features

Handling Incoming Calls:

If an agent receives an incoming call while using the calling list, the calling session will automatically pause. Once the incoming call is completed, the system resumes the calling list without manual intervention.

Multi-Tab Control:

The system restricts calling activity to a single active tab. If multiple tabs are open, the calling list will only function in one, preventing any errors from multiple tabs.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Do Not Call (DNC) Compliance:

The system automatically skips any records marked with DNC (Do Not Call), ensuring regulatory compliance.

Voice Agent Setup

Voice Agent Setup is where you build the AI voice agents used as a step in Call Routing, IVR, Calling Lists, and Voice Broadcast (see those sections) to hold live conversations with callers.
Note : this section covers the essentials. For a complete build walkthrough, see the dedicated 360 CTI Voice Agent feature guide.

Prompts and Functions

- **Instructions-** Write the agent's core instructions (a practical minimum applies — the setup screen shows a live character count).
- **Guardrails-** Add specific behavior rules the agent should always follow (e.g., always confirm the caller's identity before sharing account details).
- **Functions-** Give the agent actions it can take mid-call. Each function has a Name, Description, optional Call Routing Keyword, and a Function Action: Agentforce, Prompt, Custom Webhook, Call Routing, or Flows.
- **Flows as functions-** Select Flows as the action, then the specific Flow. Pass input values through the Parameter table (built from resources you mark Available for input in the Flow); output resources update automatically and flow back into the prompt — for example, a Case Number created by the Flow can be read back to the caller.

Cloning Prompts

The Clone button on the Edit Prompt screen creates a new prompt with all the details of the original.

- **Functions-** Changes made to Functions before cloning apply to both the original and the clone.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

- **Everything else-** Changes to name, instructions, topics, etc. made before cloning apply to the clone only — the original stays as it was.

Merge Fields

Insert live record data into what the agent says using {!ObjectName.FieldAPIName} — for example {!Lead.Name} or {!Case.Status}. If the field has a value, it's read to the caller; if the field is blank or doesn't exist, it's skipped.

Agent Voice & Language

Set the agent's Primary Language and Voice (gender and tone, with a preview) once, on the Voice Agent Setup page. This applies automatically everywhere that agent is used — individual Call Routing, IVR, Calling List, and Voice Broadcast steps no longer have their own Language or Voice fields.

Voice Broadcast

Note : this section covers what's confirmed in recent release notes. Voice Broadcast has more foundational functionality than is captured here — treat this as a starting point, not the full picture, until a dedicated walkthrough is written.

Voice Broadcast sends an automated call — a recording, IVR-style prompt, or Voice Agent — to a list of numbers without needing a live agent on the line, and can be scheduled to run daily, weekly, or monthly.

- **Call To (multi-select)-** When the Action is Play Recording, Capture Digit, or Voicemail, the Call To field becomes a multi-select picklist so the broadcast can dial more than one number on a record. Switching to Call Routing, IVR, or Voice Agent resets Call To back to a single-select field.
- **Sticky Number-** A toggle below Call From lets the broadcast use the record's sticky caller number when present, falling back to the selected Call From number when it isn't.

Contact Us

Email: care@360smsapp.com
Phone number: +91 806 902 7849
Website: Click here

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.

Copyright ® 2025
360 Degree Cloud – All Rights Reserved.
This document contains proprietary information. The contents may not be copied, duplicated, reproduced in any form, in whole or in part, electronically, manually or through AI writing tools, without prior written consent.