360 CTI

User Guide — India

Revised edition · September 2026

Covers all features up to package version 1.36

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Document History

Edition	Date	Summary of changes
Revised edition	September 2026	Guide rewritten and reorganised by task. Added all features from the August–September 2026 releases (My CTI Setup, Call Routing, IVR enhancements, voicemail drop, AI provider choice and transcript controls, reporting fields, Experience Cloud support and more). Updated existing sections to reflect current behaviour.
Previous edition	2025	360 CTI: User Guide (India).

Release 1.34 Update — Added Content

The following content from the Release Notes (version 1.34) was missing from this guide and has been added. The original text of the guide is unchanged. Added material appears in a section titled **“Additions to …”**, either at the end of the related section or on a new page numbered after it (for example, 28-A follows page 28). Placeholders marked “Screenshot to be added” have been replaced with the matching screenshot or a pointer to it.

Added content (Release Notes 1.34)	Page
3.4 Utility bar status and missed call/voicemail counts	12
4 My CTI Setup: screenshot and field display rules	14
5.3 Status on disposition screen; Dialpad From Number	19-A
6.2 Smarter Notify-in-Call behavior (Disable_Notify)	23
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7.1 Play Recording, transfer to Group, transfer status, repeat warm transfer	28-A to 28-B
9.3 Community screenshots and Power Dial setup steps	35 (continues on 35-A to 35-D)
10.2 Simultaneous ring (10 agents); 10.4 Sticky Agent rules; 10.6 screenshot	41-A
11 Call Routing: Add First/Last step, Capture Digit, owner voicemail rules, provider-tagged recordings	45 (continues on 45-A to 45-B)
12.1/12.2 IVR popup, Primary User, *, Hang Up, Replay, Max Input Digits, Callback to Call Routing	49-A to 49-D
12.3 Holiday and Dark Hours per IVR entry (screenshots)	50-A to 50-B
12.5 Record Validation fields and Keyword Based Routing	51 (continues on 51-A to 51-D)
13.2 Voicemail tab screenshot and provider sync details	52-A
14.1 Outbound IVR (IVR operation); 14.2 Post Capture Voice Message	55 (continues on 55-A)
15.2 Download access screenshot; 15.5 storage warning details	57 (continues on 57-A)
16 Sarvam AI, transcript settings screenshots, bulk transcription details	61 (continues on 61-A)
17.1 Groups column in Call Monitoring (screenshot)	62-A
18 Call Source fields combined; Call_Destination__c	64
19.9 Screen Flow pop-up in SF1 mobile app (screenshot)	70-A

1. About This Guide

This guide explains how to use and set up the 360 CTI app for India. It covers everyday calling tasks for agents and the configuration steps that administrators need to follow. It has been fully revised to include every feature released in the August–September 2026 package updates.

1.1 Who this guide is for

Reader	What to read
Agents (sales, support, collections)	Chapters 3–9: setting up your profile, making and receiving calls, transfers, dispositions, Power Dial and Calling Lists.
Administrators	Chapters 10–20: call routing, IVR, voicemail, recordings, AI transcripts, call monitoring, reporting and the CTI Setup reference.
CSM, Sales and Support teams	Chapter 2 (What's New), Chapter 21 (Troubleshooting) and Chapter 22 (Known Limitations).

1.2 How to read this guide

Each feature section starts with a short status line so you can see at a glance what changed and who it applies to:

NEW **For:** Admins **Where:** CTI Setup › General Settings

- **NEW** – the feature was introduced in this release.
- **UPDATED** – the feature already existed but works differently or has new options.
- **For** – who uses the feature (Agents, Admins, or both).
- **Where** – where to find it in Salesforce. The › symbol separates each click in the path.

Colored boxes highlight information you should not miss:

> **Note**
> Extra detail that helps you understand how a feature behaves.

> **Tip**
> A recommended way to use a feature.

> **Important**
> Something that can affect your calls or data if it is missed.

2. What's New in This Release

The table below lists every new and updated feature covered in this edition. Use the section number to jump to the full explanation.

Feature	What it means for you	See
Softphone and everyday calling		
My CTI Setup tab (NEW)	One personal page where each user manages their mobile number, voice message, voicemail and ring preference.	4
Mobile number source (UPDATED)	Your calling agent is now created, updated or deleted from the mobile number in My CTI Setup, not the Salesforce User record.	4, 2.1
Minimize incoming call (NEW)	When a new call arrives while you are saving notes, you can minimize it, finish your notes, then accept or reject.	6.2
Group name on incoming call (NEW)	The incoming call pop-up can show which group or queue the call came from.	6.3
Mute incoming ring (NEW)	Turn off the softphone ring sound for incoming calls from My CTI Setup.	6.4
Status in the utility bar (NEW)	The utility bar now shows your current status, for example "360 CTI: Online".	3.4
Status on the call-ended screen (NEW)	Mark yourself Away or Offline right after a call ends, before the next call reaches you.	5.3
Click to Dial loading message (UPDATED)	A clear message shows while the softphone is loading; numbers become clickable once it is ready.	5.1
Auto-remove missed calls on callback (NEW)	Missed calls disappear from the softphone Home tab once a connected call is made with that number.	6.6
Voicemail Drop section (NEW)	Voicemails left by customers appear in their own section in the softphone.	6.7
Play Recording on cold transfer (NEW)	Transfer a caller to a recorded message (for example, a feedback survey) and capture the key they press.	7.1
Record-specific dispositions (NEW)	Show a different set of disposition values for individual records.	8.2
Lightning Web Security message (NEW)	Clear guidance appears if Lightning Web Security is turned off while managing dispositions.	8.3
Experience Cloud: Power Dial and Calling List (NEW)	Community users with a CTI number can run Power Dial and Calling Lists.	9.3
Incoming call routing		
Call Routing (NEW)	Build flexible, step-by-step routing for one or more numbers, with time-based rules, holidays, voicemail and personalised greetings.	11
Multiple sticky agents (NEW)	Add several sticky agents in priority order; each rings in turn before normal routing continues.	10.4
Missed Call Number (NEW)	A call direction that drops the call immediately and logs it — ideal for "give us a missed call" campaigns.	10.6

Feature	What it means for you	See
Voicemail drop in User Config (NEW)	Missed calls can go to voicemail so customers can leave a message.	10.1
Simultaneous ring for SIP (UPDATED)	The Simultaneous group routing mechanism now also works with SIP numbers.	10.2
IVR		
IVR Primary User and IVR voicemail (NEW)	Set a primary user for each IVR and an IVR-level voice message or voicemail.	12.1
Star (*) key (NEW)	IVR entries can now use the * key in addition to 0–9.	12.2
Hang Up action (NEW)	End the call on a key press, with or without a closing message.	12.2
Replay Message action (NEW)	Let callers press a key to hear the current menu again.	12.2
Play Recording Then Route To (UPDATED)	Play a message and then route the caller to a user, group, record owner or sticky agent.	12.2
Holidays and dark hours per step (NEW)	Each Route To step can follow its own holiday calendar and break times.	12.3
Validate step (NEW)	Check the caller against Salesforce data and route based on what is found.	12.5
Voice messages, voicemail and recordings		
Recordings synced with the provider (UPDATED)	Record, upload (MP3/WAV) and delete voice messages in Salesforce; changes sync to the telephony provider automatically.	13.2
Recording download access (UPDATED)	Allow downloads for all users, no one, selected users, record owners or selected profiles.	15.2
Recording file names (NEW)	Downloaded recordings can be named without the customer's phone number.	15.3
Recording messages (NEW)	Clear messages explain when a recording is unavailable from the provider or cannot be played.	15.4
File storage alerts (NEW)	Warnings appear when Salesforce file storage is nearly full or full.	15.5
Automation, AI and reporting		
Outbound IVR Flow (UPDATED)	New Capture Response and IVR operation types; capture multi-digit responses.	14.1
Screen flow pop-up (UPDATED)	Works in the Salesforce mobile app, supports multiple variables, and passes the Call ID.	19.9
AI provider choice (NEW)	Choose OpenAI or Sarvam AI for transcripts, set the AI model, and manage the key in General Settings.	16.2
Transcript mode (NEW)	Generate transcripts automatically for every call, or manually only when needed.	16.3
Minimum call length for transcripts (NEW)	Skip transcripts for very short calls to save AI cost.	16.3
Transcript in English (NEW)	Convert transcripts of regional-language calls into English.	16.4

Feature	What it means for you	See
Custom AI instructions (NEW)	Write your own instructions for Call Score, Call Insight and Minutes of Meeting.	16.5
Bulk transcript generation (NEW)	Generate transcripts for many call logs at once from a list view.	16.6
Call Monitoring improvements (UPDATED)	Group column with counts, clear access messages, and Experience Cloud support.	17
Call Source, Call Source ID, Call Destination (NEW)	New Call Log fields that show how each call was made and which group it last rang.	18
Administration		
Searchable user and group pickers (UPDATED)	Large lists show the first 50 entries; type to search for the rest.	20
Platform Shield Encryption (UPDATED)	The package now installs even when Shield encryption is enabled on phone fields.	2.1

2.1 Important changes for administrators

Please review these points before or immediately after upgrading the package.

Change	What you need to do
Mobile numbers now come from My CTI Setup. On install or upgrade, each user's mobile number is copied from their Salesforce User record into My CTI Setup. After that, the user's calling agent is created, updated or deleted based only on the My CTI Setup value.	Ask users (or update on their behalf) to keep the mobile number in My CTI Setup correct. Removing the number there deletes the user's agent at the provider.
The AI transcript key has moved to General Settings.	After upgrading, open CTI Setup › User Config and click the **CTI Setup** button once. This copies your existing key into General Settings › AI Settings.
Lightning Web Security is required for the Manage Disposition table.	Keep Setup › Session Settings › Lightning Web Security turned on. If it is off, the app shows a message explaining what to do.
Platform Shield Encryption is supported.	No action needed. Installation no longer fails when Shield encryption is enabled on phone fields.
Recording link handling is built in.	No configuration is needed for call recordings to save correctly. 360 CTI Support only needs to step in if the telephony provider changes its recording address.
Settings are moving into General Settings.	A few options in this guide are marked "Enabled on request". These are switched on by 360 CTI Support today and will move into General Settings in upcoming releases.

3. Getting Started

3.1 What is 360 CTI

360 CTI is a Computer Telephony Integration (CTI) app built 100% natively on Salesforce. It connects your phone system to Salesforce so you can make, receive and manage calls, and keep a complete record of every customer conversation, without leaving Salesforce.

3.2 How calls work in India

Outgoing calls (PSTN numbers)

1. You start a call from the 360 CTI softphone in Salesforce.
2. Your own mobile or landline rings first. Answer it.
3. The app then calls the customer.
4. When the customer answers, both calls are joined and you can talk.

Both you and the customer see your **CTI number**, never your personal mobile number, so your personal details stay private. The call can be ended from your phone, from the softphone, or by the customer. You then enter the disposition and notes in the softphone.

Incoming calls (PSTN numbers)

When a customer calls your CTI number, your mobile rings and a notification appears in the softphone. Answer the call on your mobile. After the call, fill in the disposition in the softphone and save it.

PSTN and VoIP numbers compared

	PSTN number	VoIP number
Outgoing call	Rings your mobile first. If you decline it on your mobile, the customer is not called.	Connects directly to the customer from the softphone.
Incoming call	Rings your mobile and shows a pop-up on your desktop. You accept or decline on your mobile, not on the desktop.	Rings in the softphone. You can accept or reject from the desktop.
Features	All features in this guide apply.	All features in this guide apply.

> **Tip**
> For VoIP numbers, the incoming pop-up may appear on every open Salesforce browser tab. This is the provider's default. If you prefer calls to ring on a single tab (recommended for high call volumes), ask 360 CTI Support to request it from the provider.

3.3 Before you start

Check the following before making your first call:

- A **CTI number** has been assigned to user.
- User have a **360 CTI licence**.
- User **mobile number** is correct in the **My CTI Setup** tab (see Chapter 4). All calls ring on this number.

- Your softphone **status is Online**.

3.4 The softphone at a glance

UPDATED **For:** Agents **Where:** Salesforce utility bar › 360 CTI

The 360 CTI softphone opens from the utility bar at the bottom of Salesforce. It has four tabs:

Tab	What you can do
Home	See Outgoing, Incoming, Missed and Pending calls, plus the new Voicemail Drop section. Click any entry to call back.
DialPad	Type or paste a number and call it.
Call Logs	See recent calls (All or Missed) and call anyone again with one click.
Settings	Manage personal options such as missed call forwarding numbers, and run Calling Lists.

Your status

Your status tells the system whether you can take calls. Click your profile icon in the softphone to change it.

- **Online** (green) – you can make and receive calls.
- **Away** (orange) – you are temporarily unavailable.
- **Offline** (red) – you are not taking calls.

Your administrator can add reasons under Away and Offline (for example, "Lunch" or "Meeting") so your team knows why you are unavailable.

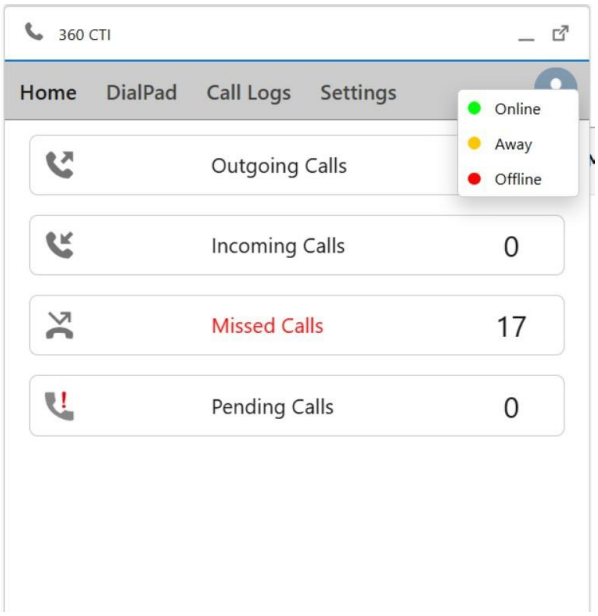


Figure 1: Changing your status in the softphone

New: The utility bar now shows your current status next to the app name, for example **360 CTI: Online**, so you can see it without opening the softphone. It updates instantly when you change status.

> **Note**
> The "360 CTI" label in the utility bar can be renamed for your org (for example, to your team's name). This is enabled on request by 360 CTI Support.

Additions to 3.4 The softphone at a glance

NEW **Source:** Release Notes 1.34

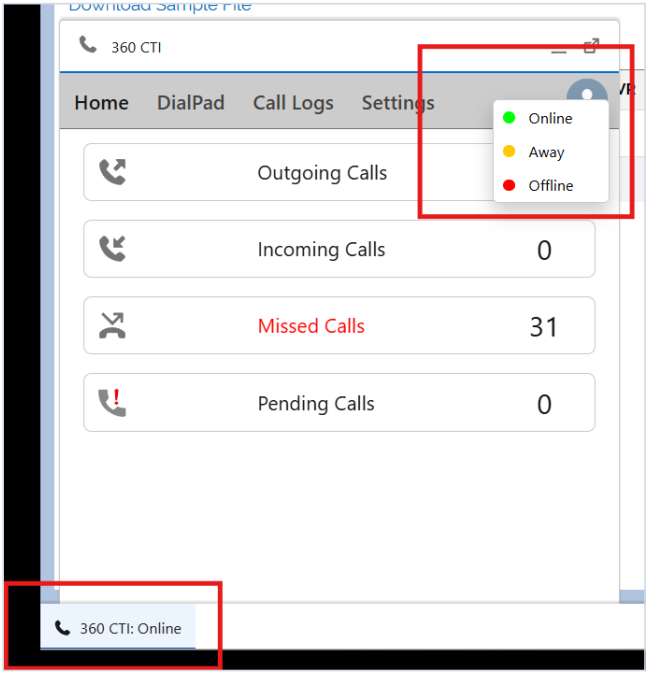


Figure: User status options and "360 CTI: Online" on the Utility Bar

User Status Shown on the Utility Bar

The Utility Bar now shows the user's status as “360 CTI: Online” or “360 CTI: Offline.” If a customer has renamed their utility bar, admins can still show this status by creating a custom setting record named Override_Utility_Bar_Info, with the utility bar's name entered in that field.

Missed Call & Voicemail Counts on Your Utility Bar (International Numbers)

For international numbers, the Utility Bar can now show missed call and voicemail counts, for example: “360 CTI (Missed Call: 1 | Voicemail: 0).” This is controlled by a custom setting named Show_Utility_Notification, which is muted by default.

4. My CTI Setup

NEW **For:** All users **Where:** 360 CTI app › My CTI Setup tab

My CTI Setup is login user personalized settings tab. It gives every user one place to manage their own calling preferences. The tab is added automatically when the package is installed or upgraded. Settings here apply only to login user and to every number assigned to user, directly or through a group.

> **Why a personal page?**
> If the ring sound were controlled on a number, turning it off would affect everyone in that number's group. If it were in General Settings, it would affect the whole company. My CTI Setup lets each person choose for themselves.

4.1 Fields on My CTI Setup

Field	What it does
Name	Your Salesforce user name. Read-only.
Mobile Number	Enter the user's mobile number. The user's calling agent will be created, updated, or deleted based on the value entered in this field. It is filled from your Salesforce User record the first time the package is installed or upgraded.
Voice Message	A message played to the caller when a call routed to you (for example, from an IVR route to user step) is not answered. The call then ends. Example: "I'm out of the office today; I'll call you back tomorrow."
Voicemail	A message played when you do not answer, followed by a beep so the caller can leave you a voicemail.(Example : Call routing record owner voice mail or last communicator voice mail)
Mute Incoming Call	Set to **Yes** to silence the softphone ring sound for incoming calls. Default: **No**.

> **Important**
> Removing your mobile number from My CTI Setup deletes your calling agent, and you will stop receiving calls.
> If both Voice Message and Voicemail are set, the **Voice Message** plays.

4.2 Update your settings

1. Open the **360 CTI** app and click the **My CTI Setup** tab.
2. Click **Edit**.
3. Update your mobile number, voice message, voicemail or ring preference.
4. Click **Save**. Mobile number changes sync to the provider automatically.

Screenshot added ? see page 14.

4.3 Where my CTI Setup tab voice message and voicemail are used

- **IVR:** when an IVR step routes a call to you (User, Record Owner or Sticky Agent) and you do not answer, and no IVR-level voicemail is set.
- **Call Routing:** in the **Record Owner Voicemail** and **Last Communicator Voicemail** steps, so callers hear the personal greeting of the person they were trying to reach.

> **Note**
> Personal voice messages and voicemail are not used for calls routed by User Config. See Chapter 13 for the full rules.

Additions to 4. My CTI Setup

NEW **Source:** Release Notes 1.34

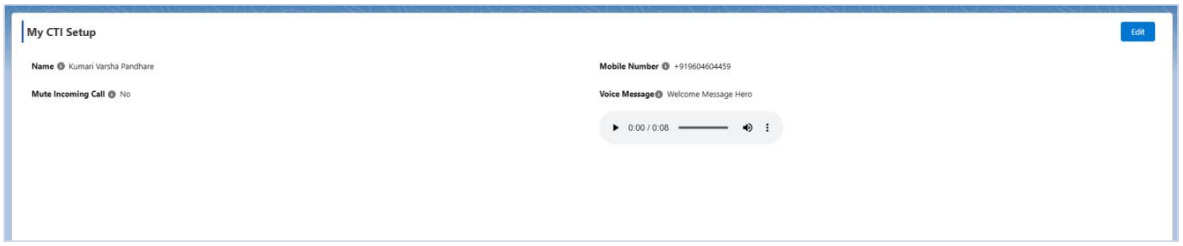


Figure: My CTI Setup tab

When the package is upgraded, the mobile number is automatically updated based on the value stored on the user's record.

The Mute Incoming Call option now works for users with either an international number or a VoIP/PSTN number.

A Voice Message option is displayed when the user has a VoIP/PSTN number. If the user has both an international number and a VoIP/PSTN number, both the Voicemail Type and Voice Message fields are displayed.

Other setup fields are displayed only when Enable India Provider is turned off.

Once a number is assigned to the user, the relevant configuration options become available based on the type of number assigned.

5. Making Calls

5.1 Ways to make an outgoing call

UPDATED **For:** Agents

a. From the DialPad

Open the softphone, go to **DialPad**, enter the number and click the call button.

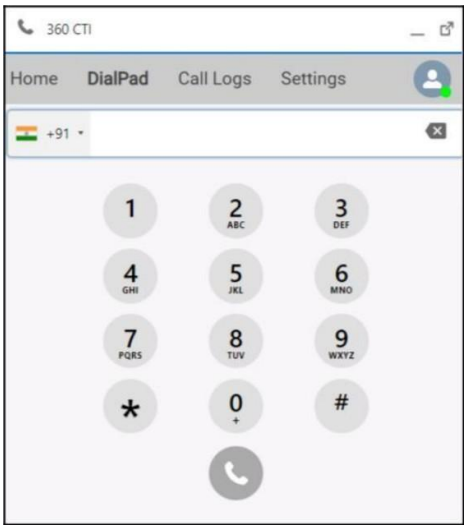


Figure 2: Calling from the DialPad

b. With Click to Dial

Open a record (for example, a Lead or Contact) and click a phone number in the **Click to Dial** component.

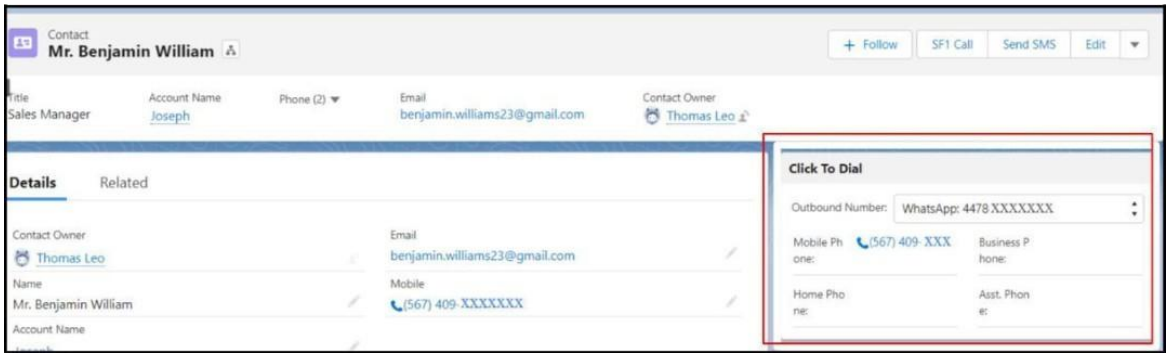


Figure 3: Click to Dial on a record page

New: While the softphone is still loading after a page refresh, the component shows the message "Please wait while the softphone is loading. Click to dial will be enabled once the softphone is ready." Phone numbers become clickable as soon as the softphone is ready. This prevents calls that seem to "do nothing" when clicked too early.

Screenshot to be added: *Click to Dial component showing the "softphone is loading" message.*

c. From the Home tab

On the softphone **Home** tab, open **Outgoing Calls** (or Incoming or Missed) and click the call icon next to any entry to call again.

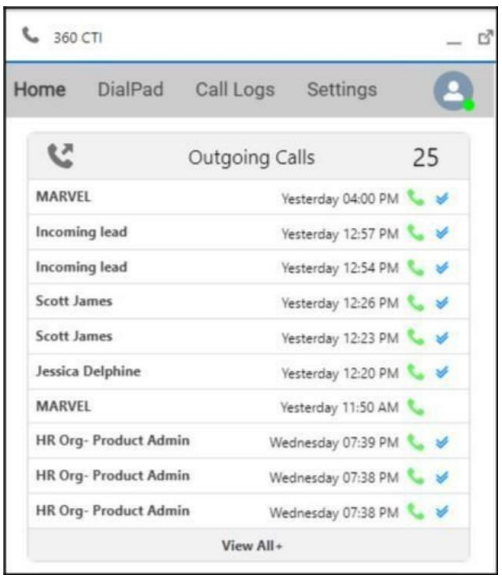


Figure 4: Calling again from the Home tab

d. From Call Logs

Open **Call Logs** to see recent calls and click the call icon to dial.

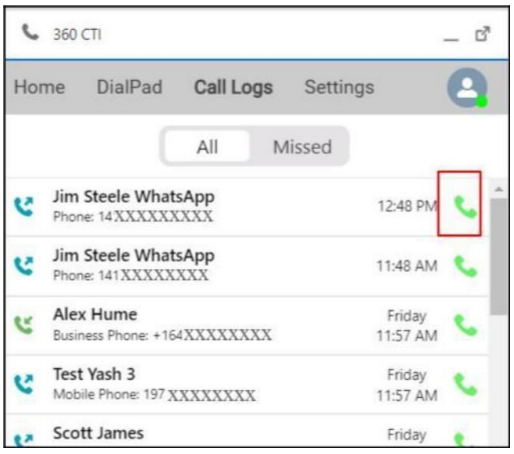


Figure 5: Calling from Call Logs

5.2 Call stages

The softphone shows three stages during an outgoing call:

Stage	What is happening
Connecting	The app is calling your mobile.
Ringing	You answered your mobile; the customer's phone is ringing.
Connected	The customer answered and you are both on the call.

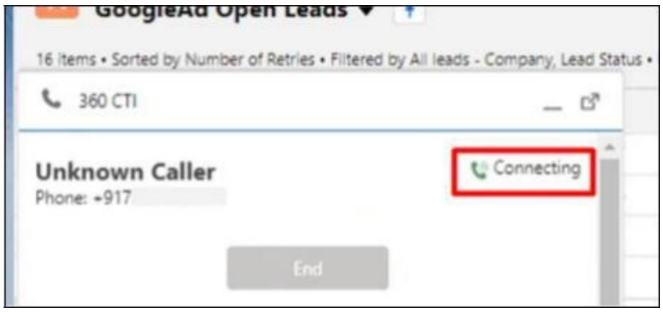


Figure 6: Connecting to your mobile

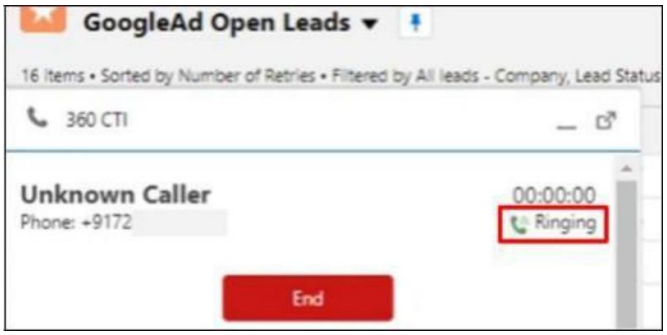


Figure 7: Ringing the customer

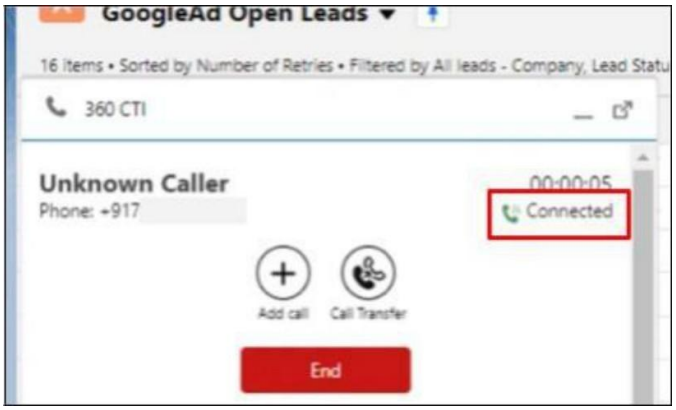


Figure 8: Connected

5.3 Ending a call and saving details

UPDATED **For:** Agents

A call can be ended from your mobile, from the softphone (**End**), or by the customer. The softphone then shows the call-ended screen, where you:

1. Select a **Disposition** (the call outcome, such as Interested or No Answer).
2. Add a description or any other required fields.
3. Click **Save**.

Change your status from the call-ended screen

NEW **For:** Agents

A status icon now appears on the call-ended screen. Use it to mark yourself **Away** or **Offline** before saving, so no new call reaches you while you step away. This is especially helpful during Calling Lists, Power Dial and busy inbound shifts.

> **Note**

If you mark yourself Away or Offline during Power Dial or a Calling List and then click Call, the softphone shows a message that you must be Online to make an outgoing call.

Screenshot added ? see page 19-A.

5.4 Choosing the number customers see

Default caller number

If you have more than one CTI number, your administrator can choose which one is used for outgoing calls by default (see 19.2).

Number labels

Numbers can be given labels (for example, "Sales" or "Support") so you can tell them apart. Labels are set in CTI Setup › User Config.



Figure 9: Number label in User Config

Sticky Caller

Sticky Caller keeps the same outgoing number for a customer every time they are called. Customers recognise the number and the relationship feels consistent. Add the **Sticky Caller** field to the record page, then set the number to use for that record.

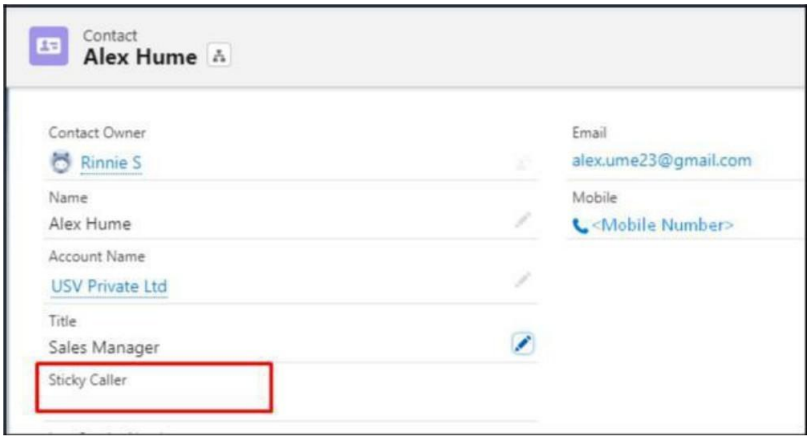


Figure 10: Sticky Caller field on a Contact

Note

Sticky Caller (which number is used for outgoing calls) is different from Sticky Agent (which agent incoming calls ring first). Sticky Agent is covered in 10.4.

Additions to 5.3 Ending a call and 5.4 Choosing the number

NEW **Source:** Release Notes 1.34

Change Your Status From the Call Disposition Screen

When Call Waiting is on and an agent doesn't want more calls while wrapping up, they can now change their status right from the call disposition screen. The user status/avatar icon now appears there for every type of incoming and outgoing call.

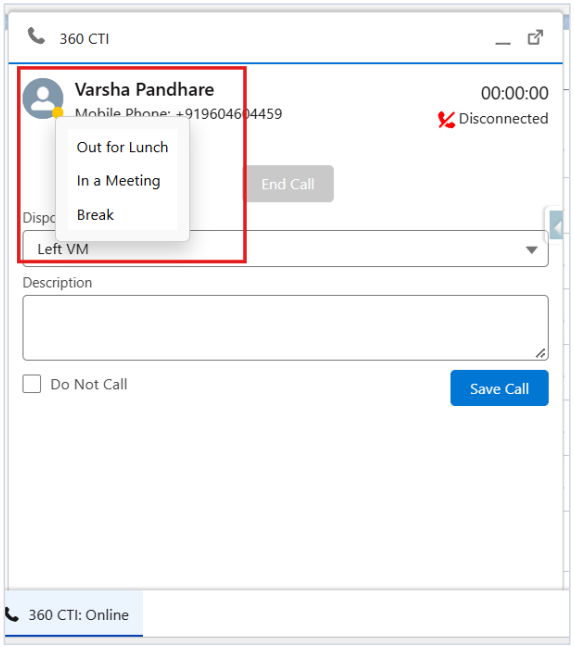


Figure: Status options on the call disposition screen

Dialpad Behavior Improvement

When a user selects a different “From Number” during a Dialpad search, the call will now be initiated from the selected number instead of the previously used number.

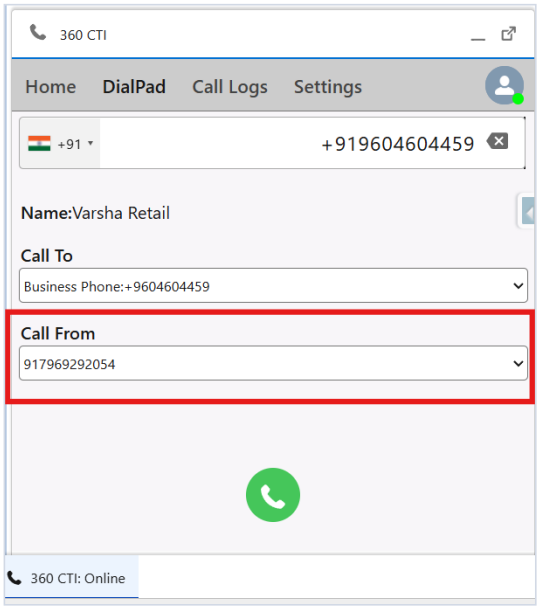


Figure: Call From number on the DialPad

5.5 Scheduling a call

Schedule calls so they appear in the softphone on the right day.

Choose what the Pending Calls section shows (admin)

1. Go to **CTI Setup › General Settings › Edit**.
2. In **Softphone Settings**, set **Softphone Pending Calls** to one of: **Pending CTI Tasks** (follow-up tasks) or **Pending Scheduled Calls** (it shows custom scheduled calls which is scheduled for today). Only one option can be selected.
3. Click **Save**.

Create a scheduled call

1.Create Schedule Date Time Field in Call log Object field Data type is (Date/Time)..

2.Create a call record and set the **Call Schedule Date** and **Time**.

3. While saving the call if User select the future Date time in Scheduele Data time field than Schedule record will create for the customer. The call appears under **Pending Calls** on the softphone Home tab on that day.

6. Receiving Calls

6.1 Answering an incoming call

VOIP

When an incoming call arrives, the call rings on the desktop CTI Softphone. The incoming call pop-up displays the customer's details, including **Object, Call From, Call To**, and other incoming call information.

The user can:

- Click **Accept** to answer the call.
- Click **Decline** to reject the call.
- After the call ends, the user can enter the call disposition and click **Save**.

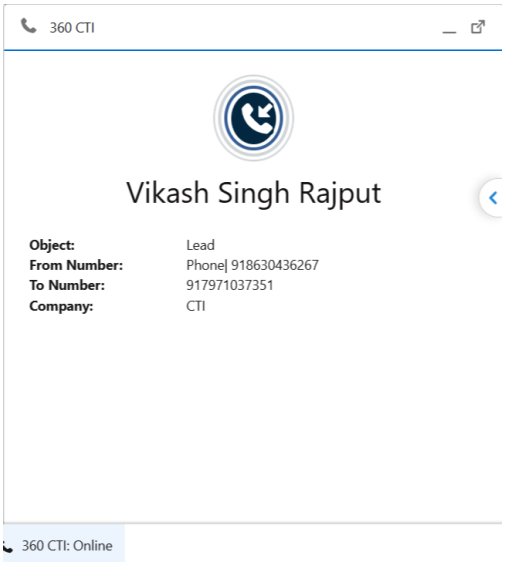


PSTN

When an incoming call arrives, the call notification appears on the desktop CTI Softphone. The incoming call pop-up displays the customer's details, including **Object, Call From, Call To**, and other incoming call information.

At the same time, the call rings on the user's registered mobile number. The user must answer or decline the call from their mobile phone.

If the user **answers the call on their mobile phone**, the call is connected. After the call ends, the user can enter the call disposition in the CTI Softphone and click **Save**.



.

Figure 13: Incoming call screen

> **Tip**
> Admins decide which record fields appear on the incoming call screen (up to five) in CTI Setup › Object Setup › Incoming Call Fields. System details such as the From and To numbers, number label and group name are shown in addition to these five.

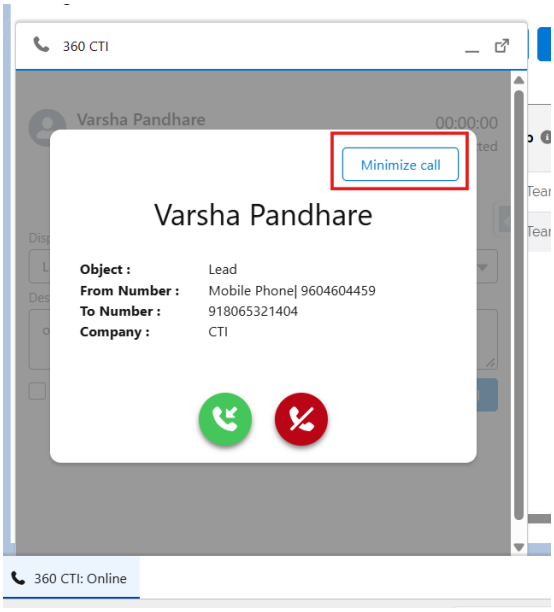
6.2 A new call arrives while you are saving notes

NEW **For:** Agents

If a new call comes in while you are still on the call-ended screen, you are notified of it. Previously you could only **Accept** or **Reject** it, which meant losing unsaved notes. Now you have a third option:

- **Minimize** – the notify call pop –up will appear on the top of the CTI Softphon eso you can finish and save your Previous call. You can then accept or reject the waiting call.

  This works automatically; no setting is needed.



> **Note**
>
> Some teams prefer agents never to be interrupted while writing notes. On request, 360 CTI Support can switch off these notifications. When switched off, a call that arrives during wrap-up is treated as missed (or follows your missed call forwarding) and is counted in the agent's missed calls.

Screenshot to be added: *Incoming call notification on the call-ended screen with Accept, Reject and Minimize buttons.*

Additions to 6.2 A new call arrives while you are saving notes

NEW **Source:** Release Notes 1.34

Smarter Notify-in-Call Behavior

Agents can now finish filling in their previous call's disposition before the Notify in Call popup appears, instead of being forced to answer it first. Separately, if a user is on the end-call screen, Notify in Call won't interrupt them at all — this is controlled by a custom setting named Disable_Notify, set to Enable = True.

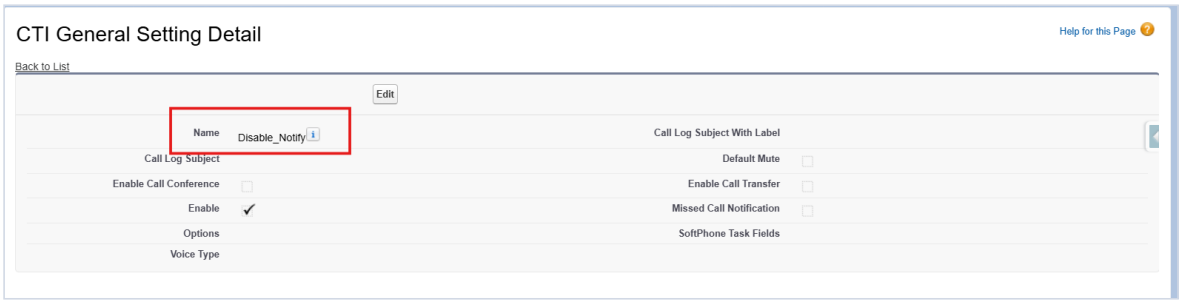
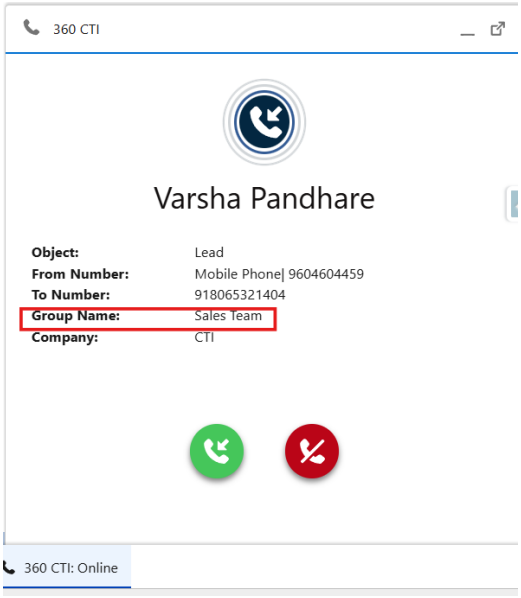


Figure: Disable_Notify custom setting

6.3 See which group the call came from

NEW **For:** Agents **Where:** Enabled on request

When a call is routed through a group — from User Config, an IVR or Call Routing — the incoming call pop-up can show the **group name**. Agents who belong to several groups immediately know the context of the call.



> **Example**
> Priya is in both the "SMS Support" and "CTI Support" groups. The pop-up tells her which product the caller needs help with. A bilingual agent in "English" and "French" groups knows which language to greet the caller in.

> **Note**
> IVRs can also use **Call Tags** to label calls. Both can be shown together. This option is enabled on request by 360 CTI Support.

Screenshot added ? see page 24-A.

6.4 Mute the incoming ring

NEW **For:** Agents **Where:** My CTI Setup

To stop the softphone playing a ring sound for incoming calls, set **Mute Incoming Call** to **Yes** in My CTI Setup (see Chapter 4). Your mobile still rings as normal.

6.5 Calls from unknown numbers

For: Admins **Where:** CTI Setup › General Settings › Edit › Unknown Call Settings

Link Unknown Call automatically creates a record when a call is made to or received from a unknown number that is not in Salesforce, so no potential customer is lost.

Additions to 6.3 See which group the call came from

NEW **Source:** Release Notes 1.34

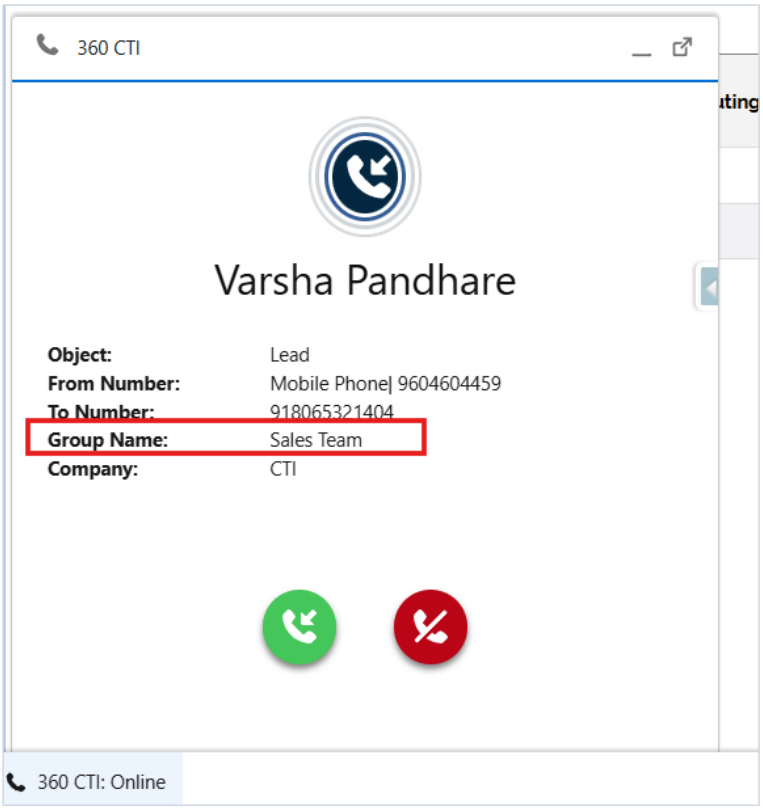


Figure: Group Name on the incoming call screen

When a call comes in through a Group, the CTI Softphone now shows that group's name while the call is ringing. If the call is then transferred from User A to User B, User B also sees the name of the group the call originally came in on. This is turned on with a custom setting named ShowQueueNameOnSoftphone.



Figure: ShowQueueNameOnSoftphone custom setting

Setting	Options
Object	**Lead**, or **Account & Contact**. Only one type of record is created.
Type	**Incoming**, **Outgoing** or **Both** – which calls create the record.
Fields	Values to fill in on the new record.

1. Go to **CTI Setup › General Settings** and click **Edit**.
2. Find **Link Unknown Call** under **Unknown Call Settings**.
3. Choose the object and type, and set the field values.
4. Click **Save**.

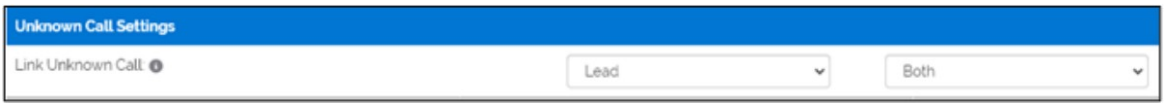


Figure 14: Link Unknown Call settings

6.6 Missed calls

UPDATED **For:** Agents, Admins **Where:** Softphone › Home › Missed Calls

Missed calls appear on the softphone **Home** tab. Click an entry to call back, or clear it when it is handled.

Auto-remove missed calls on callback

NEW **For:** Admins **Where:** CTI Setup › General Settings › Missed Call Settings

Turn on **Auto Remove Missed Call On Callback** to clear missed calls automatically once they are handled. When a **connected** call (incoming or outgoing) takes place with the same phone number, all missed call entries from that number are removed from the softphone Home tab.

- It works however the callback is made: the missed calls list, Click to Dial, a Calling List, the DialPad or anywhere else in the app.
- Only connected calls count. An unanswered callback does not clear the entry.
- Only the **same number** clears the entry. A call with a different number on the same record does not.
- The call log records stay in Salesforce for reporting; only the softphone list is cleared.
- Default: **Off**.

> **Example**
> Mansi calls three times while you are busy. You call her back and she answers. All three missed call entries from Mansi disappear from your Home tab.

Screenshot to be added: *General Settings › Missed Call Settings with the Auto Remove Missed Call On Callback toggle.*

6.7 Voicemail drops

NEW **For:** Agents **Where:** Softphone › Home › Voicemail Drop

When a caller leaves a voicemail, a **Voicemail Drop** task is created and appears in the new **Voicemail Drop** section of the softphone. Click **View All** to open a page listing every voicemail, and play the recording from the call log. See Chapter 13 for when voicemail is offered to callers.

Additions to 6.7 Voicemail drops

NEW **Source:** Release Notes 1.34

See All Voicemails in One Place

Agents can now view all voicemails in one place from the Voicemails section on the Softphone Home Tab. When they click View All, an All page opens, showing both their own voicemails and voicemails from other users. To enable this feature, set the SoftPhone Dashboard Settings for the Voicemail section to App Default in CTI General Settings. This feature is controlled by the ShowAllVoicemails custom setting with Default_mute__c set to true.

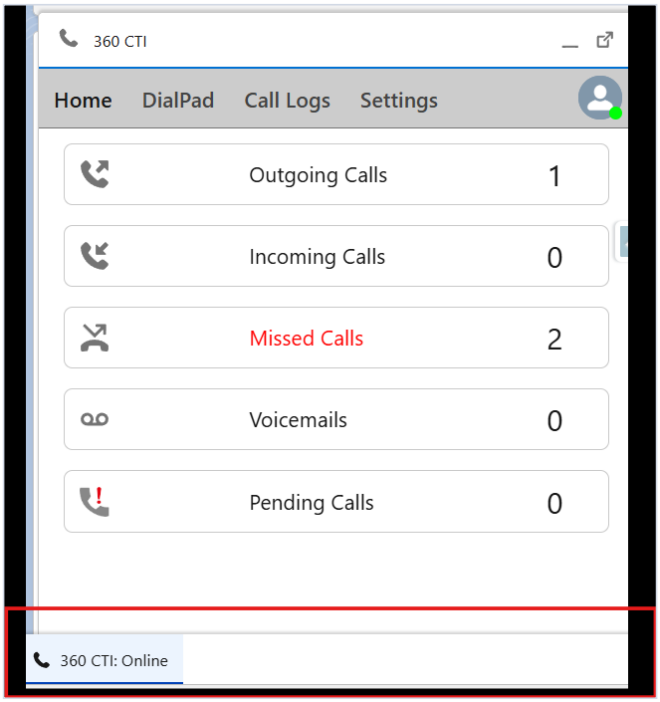


Figure: Voicemails section on the Softphone Home tab

7. During a Call

7.1 Transferring a call

UPDATED **For:** Agents, Admins **Where:** CTI Setup › General Settings › Call Settings

Call Transfer moves a live call to another agent, team or number without the customer hanging up.

Turn on call transfer (admin)

1. Go to **CTI Setup › General Settings** and click **Edit**.
2. Under **Call Settings**, select **Enable Call Transfer**.
3. Choose the **Call Transfer Type**: **Warm (customser goes** on Hold once primary user leave the call than only Transferred User and customer can communicate with each other) or
4. **Call Transfer Type: Cold, Once Primary user transfer the call to User, call get disconnect from the primry user and redirected to transferred user.**
   (you are disconnected as soon as the transfer starts).
5. Click **Save**.

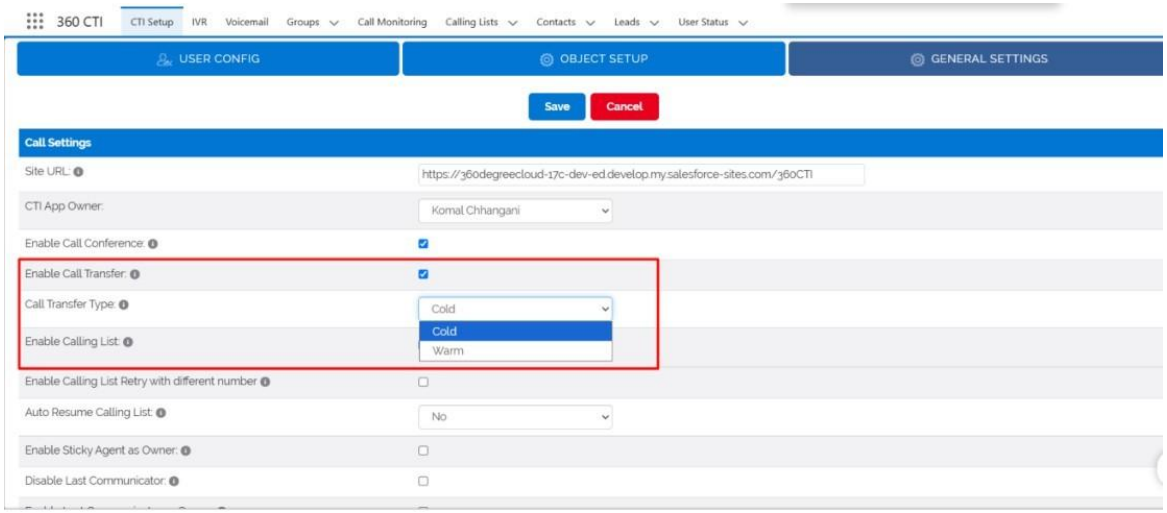


Figure 15: Call transfer settings

Transfer a call (agent)

During a call, click **Call Transfer** in the softphone and choose where to send the call:

Option	What it does
User	Transfer to another Salesforce user.
Dial Number	Type an external number to transfer to.
Object	Search for a record (for example, a Contact) and transfer to its number.
Play Recording (NEW – cold transfer only)	Transfer the customer to a recorded message. You are disconnected, the message plays, and any key the customer presses is saved in the **Key Press** field on the call log.

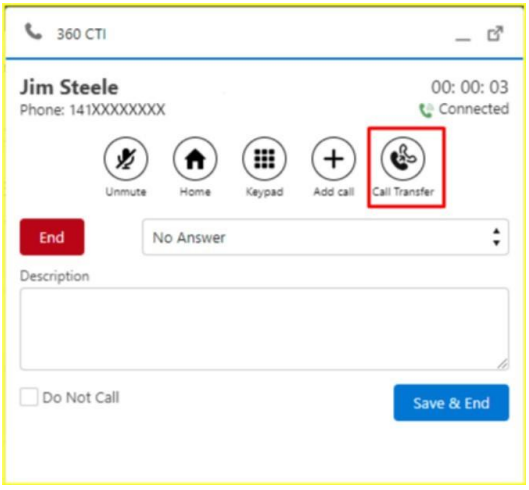


Figure 16: Call Transfer button during a call

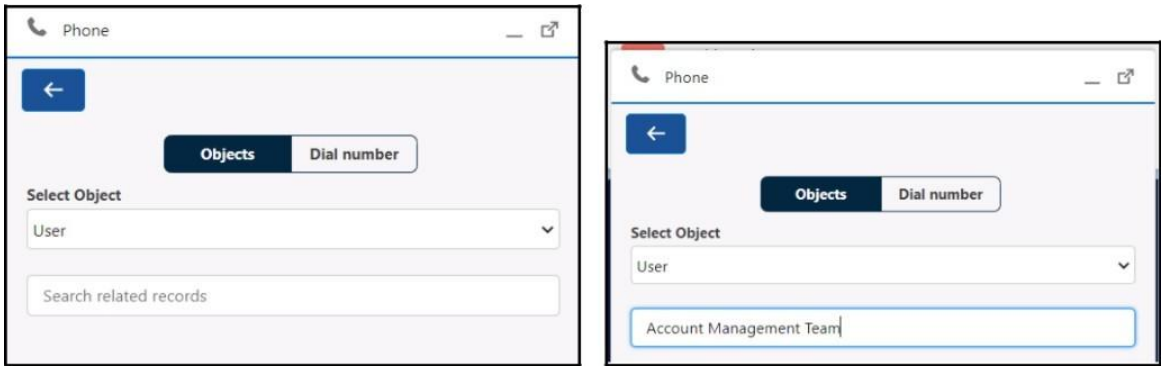


Figure 17: Transferring to a record (Object)

> **Example**
>
> At the end of a support call, transfer the customer to a "Please rate our service from 1 to 5" recording. Their rating is saved in the Key Press field so you can report on it.

> **Limitation**
>
> The key pressed after Play Recording is only stored. It cannot route the call onward. To act on the response, build a Salesforce flow on the Key Press field.

Screenshot added ? see page 28-A.

7.2 Do Not Call

For: Agents

When a customer asks not to be called, select the **Do Not Call** checkbox on their record. No one in your organisation will be able to call that customer from 360 CTI.

Additions to 7.1 Transferring a call

NEW **Source:** Release Notes 1.34

Play Recording During Cold Call Transfer

When an agent performs a cold call transfer on a VOIP/PSTN number, the customer will now hear a preconfigured voice message as soon as the transferred call is Play Recording. The customer can then respond by pressing a key, and the selected key press is automatically saved in the call log Key pressed Field.

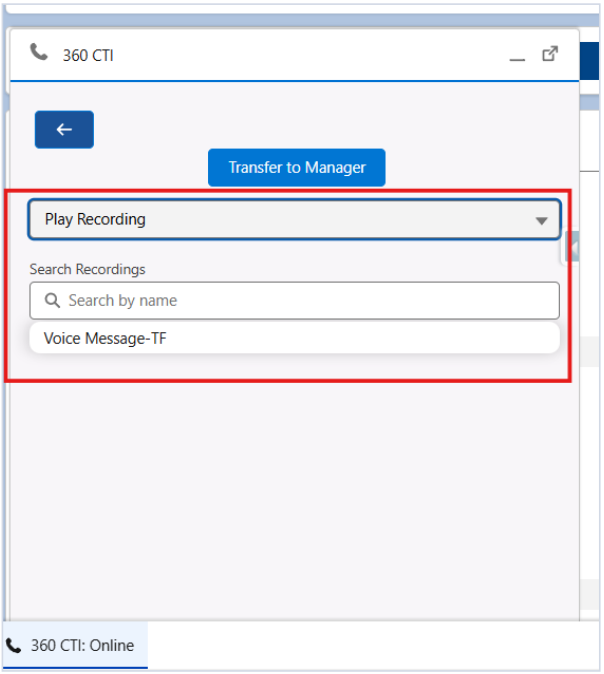


Fig. Cold Transfer to Play Recording

Transfer Calls to an Entire Group

Agents can now transfer calls to an entire **Group** instead of transferring them to a single user.When Call Transfer type is Warm.

The system calls group members in **round-robin order**. If one member does not answer, the call automatically moves to the next available member.

> **Limitation**
>
> The transfer may fail if a user is online on the softphone but is not logged in to Salesforce or their CTI component has not loaded. In this situation, the system cannot confirm whether the call successfully reached the user.

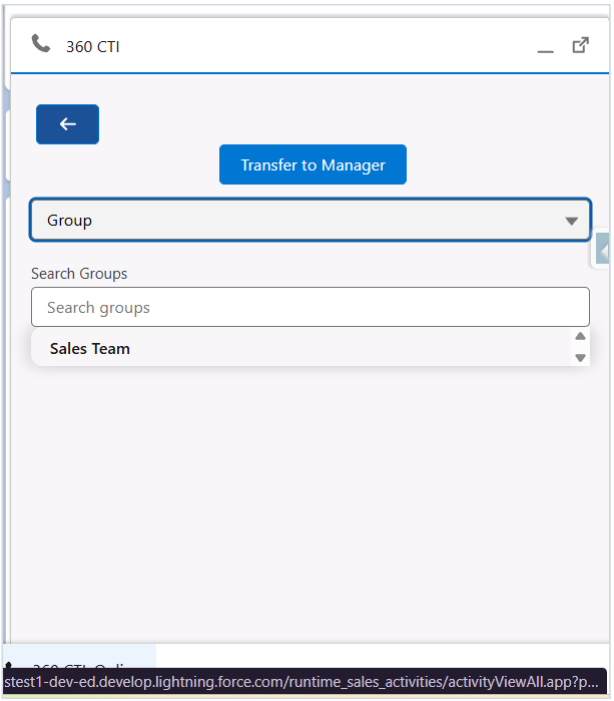


Fig. Call Transfer To Group

See When a Transferred or Conference Call Is Answered

When User A transfers a call to User B, there was previously no way to tell whether User B is connecting, has answered, has rejected, or hasn't answered at all. A blue banner on the softphone now shows this status, and the same banner appears during call conferences.

Keep Transferring Until Someone Picks Up (Warm Transfer)

If User A does a warm transfer to User B and User B doesn't join, User A can now transfer the call again — to User C, and so on. The transfer button stays visible until someone actually joins the call. This works on Community and SF1 as well.

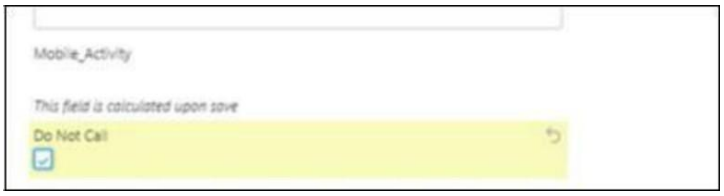


Figure 18: Do Not Call checkbox on a record

You can also do this during a call: select **Do Not Call** at the bottom of the softphone before saving.

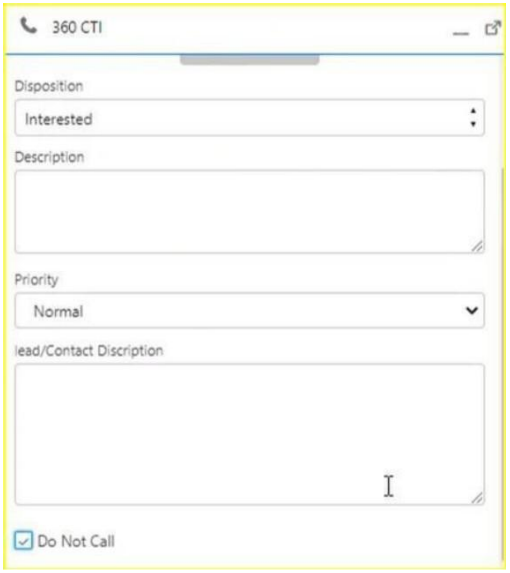


Figure 19: Do Not Call on the softphone

For Custom Object User need to Create DNC__c Checkbox field to set/use the Do not call feature.

> **Note**
>
> Admins can hide the Do Not Call checkbox on the softphone with the **Disable DNC** setting in General Settings › Other Settings.

8. Dispositions and Call Details

A disposition is the outcome of a call, such as Interested, No Answer or Send Proposal. Dispositions make call logging fast and reporting meaningful.

8.1 Set dispositions by profile

For: Admins **Where:** CTI Setup › General Settings › Softphone Settings › Manage Disposition

Different teams need different outcomes. A sales rep might need "Follow-up Demo" and "Send Proposal", while a support agent needs "Escalated to Tier 2" or "Resolved". Set these per profile:

1. Go to **CTI Setup › General Settings**.
2. In **Softphone Settings**, click **Manage Profile Wise Setting**.
3. Add a row for each profile and fill in the columns below.
4. Click **Save**.

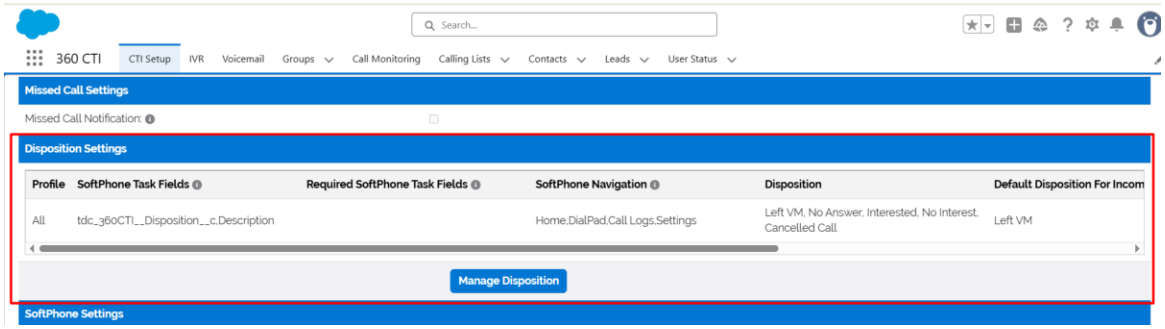


Figure 20: Disposition settings table

Column	What it does
Profile	The profile the row applies to.
Softphone Task Fields	Up to five Task/Call Log fields shown on the softphone. Supported types: Text, Text Area, Picklist, Checkbox, Date, Date/Time.
Required Softphone Task Fields	Fields the agent must fill in before saving.
Softphone Navigation Menu	The order of tabs in the softphone.
Disposition	The disposition values, separated by commas.
Default Disposition For Outgoing Call	The value pre-selected on outgoing calls.
Default Disposition For Incoming Call	The value pre-selected on incoming calls.
Mandatory Comment For Disposition	Dispositions that require a description before saving.

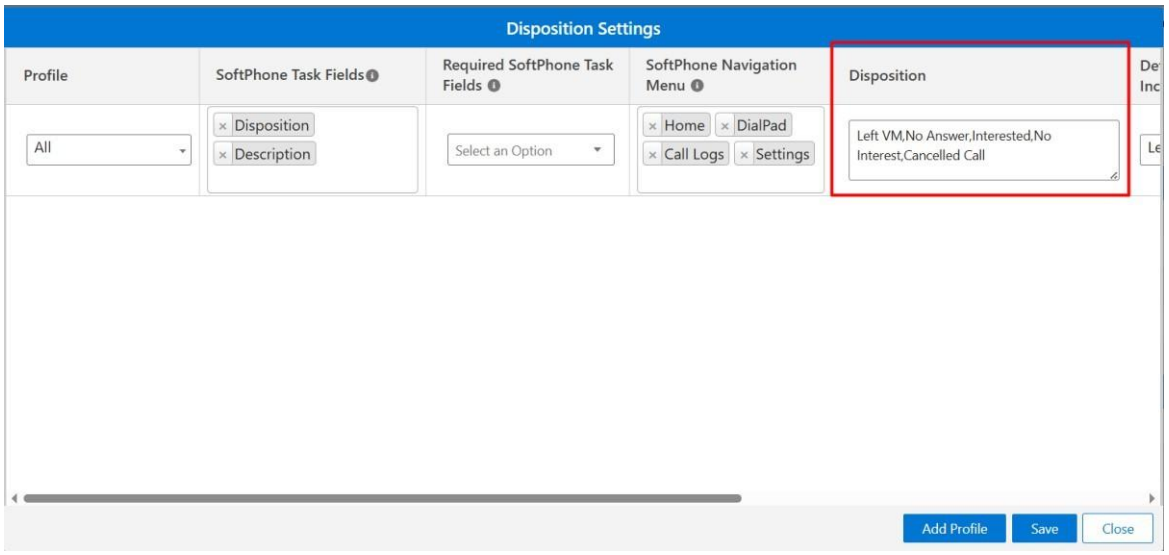


Figure 21: Entering disposition values

8.2 Record-specific dispositions

NEW **For:** Admins

You can override the disposition list for individual records. This is useful when different customers, products or campaigns need their own outcomes.

1. Create a field labelled **Call Disposition** on the object you call (for example, Lead, Contact or Opportunity).
2. On a record, enter the disposition values that should be used when calling that record.
3. Calls to or from that record — incoming, outgoing, IVR and Salesforce mobile app calls — now show these values in the softphone Disposition field instead of the profile list.

> **Example**
> Lead A has Call Disposition values "360 SMS" and "360 CTI". Lead B has "QA Working" and "Awesome". When you call each lead, the softphone shows only that lead's values.

Screenshot to be added: *Call Disposition field on a Lead and the overridden values on the softphone.*

8.3 Lightning Web Security requirement

NEW **For:** Admins

The Manage Disposition table needs Salesforce **Lightning Web Security** to be turned on. If it is off, a message now explains what to do instead of the page breaking. To turn it on, go to **Setup › Session Settings** and select **Use Lightning Web Security for Lightning web components**.

8.4 Control the fields agents see

- **Incoming call screen** – CTI Setup › Object Setup › **Incoming Call Fields** (up to five).
- **Softphone task fields** – General Settings › Softphone Settings › **Softphone Task Fields** (or per profile in Manage Disposition).
- **Softphone navigation bar** – see 19.7.
- **Records opened from a call log** – General Settings › **Display Related Records**.

9. Bulk Calling: Power Dial and Calling List

9.1 Power Dial

For: Agents, Admins

Power Dial calls a list of records one after another, so agents spend their time talking instead of dialling. Each call is logged in Salesforce automatically.

Before you start

- Power Dial works on the **Split View** of an object's list view (for example, Leads or Contacts). Switch the list view display to **Split View**.
- Admins set the default phone field Power Dial uses in **CTI Setup › Object Setup › Default PowerDial Fields**.
- The Power Dial button must be on the page layout (see 19.6).

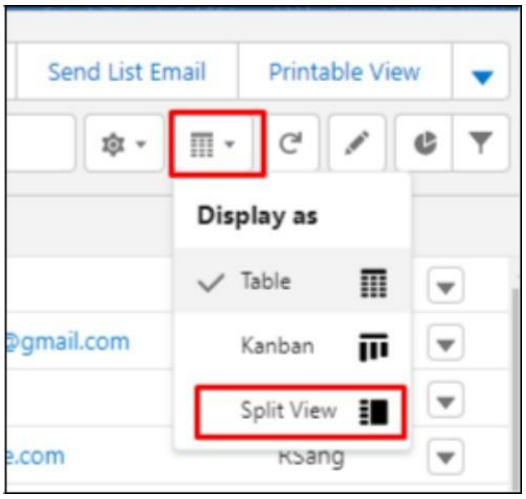


Figure 22: Switching a list view to Split View

How it works

1. Start Power Dial from the list view.
2. The first number is dialled. When the call ends, save the disposition.
3. A dialog offers three choices: **Call** (dial the next record), **Skip** (skip the next record) or **Break** (stop the session).
4. For custom Object create the New Action Button **Action Type: Lightning component, Lightning component: Powerdial give the Lable for the Button. And Add it into the Object Page Layout.**

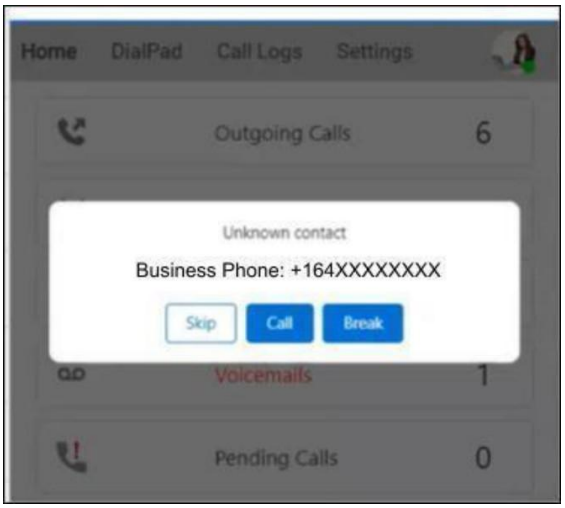


Figure 23: Power Dial options: Skip, Call, Break

> **Tip**
> Popular for outbound sales, collections, and customer service follow-ups where many customers must be reached quickly.

9.2 Calling List

For: Agents, Admins **Where:** CTI Setup › General Settings › Call Settings

A Calling List is a saved list of records that agents call one by one from the softphone. The system moves through the list automatically.

> **Example**
> Adam has hundreds of trial users to contact. He creates a Calling List of trial users, and the softphone calls each one in turn. He logs notes and transfers calls without leaving the screen, reaching more leads in a few hours than he used to in a week.

Settings (admin)

Setting	What it does
Enable Calling List	Turns the Calling List feature on.
Enable Calling List Retry With Different Number	Lets agents retry a record using a different phone number.
Auto Resume Calling List	Automatically starts the next call after the current record is saved.

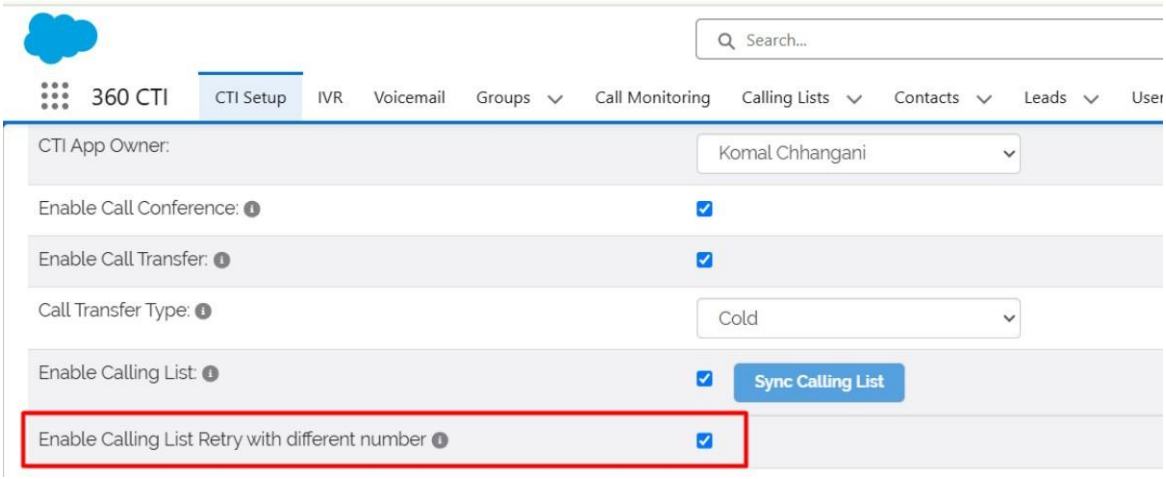


Figure 24: Calling List settings

Create a Calling List

1. Create a list view with filters for the records you want to call.
2. Select specific records or all records in the list view.
3. Enter a **name** for the list (for example, "Renewals – March").
4. Choose **Call From**: one of the numbers you can access, or **Sticky Caller** to use each record's sticky number.
5. Assign the list to **users** or **queues**. Users only see records they have permission to access.
6. Set the **Retry Interval** (in hours).
7. Set the status to **Active**. Switch it to **Inactive** to pause the list.

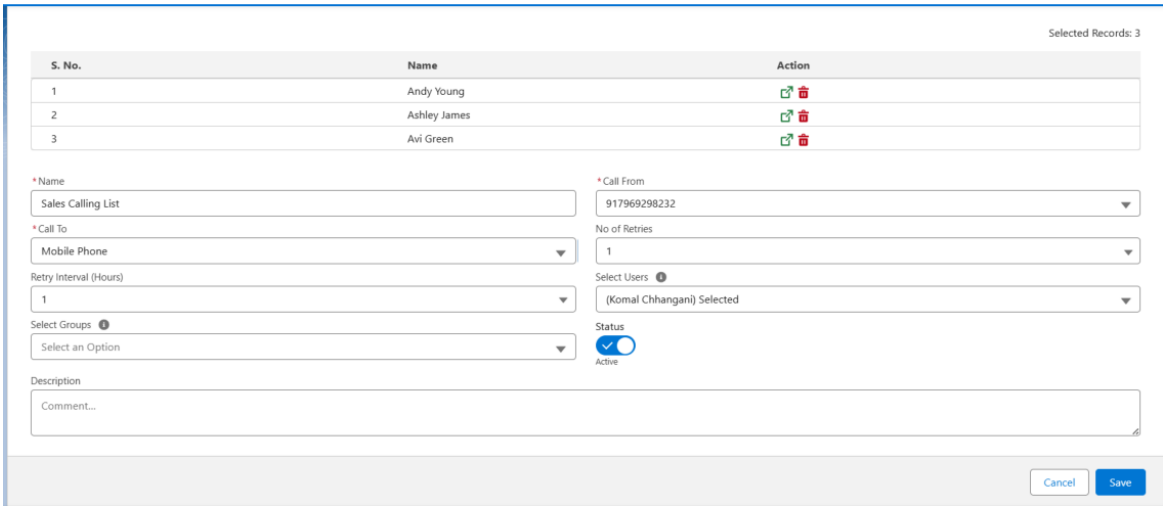


Figure 25: Creating a Calling List

9.3 Power Dial and Calling List in Experience Cloud

NEW **For:** Admins, community users

Community (Experience Cloud) users who have a CTI number can now use Power Dial and Calling Lists, with the same softphone experience as internal users.

Power Dial for community users

1. Create a Power Dial button for the object (for example, "Community Power Dial" on Lead).
2. Add the button to the object's page layout.

3. The community user opens a record, clicks the button and chooses a list view. Dialling starts with the first record in that list view.

Calling List for community users

1. An internal admin creates the Calling List and gives the community user access to it.
2. The community user opens the softphone **Settings** tab and runs the list.
3. They can save each call, move to the next call, or stop the list, exactly as internal users do.

> **Limitation**
>
> Community users cannot create Calling Lists themselves.

Additions to 9.3 Power Dial and Calling List in Experience Cloud

NEW **Source:** Release Notes 1.34

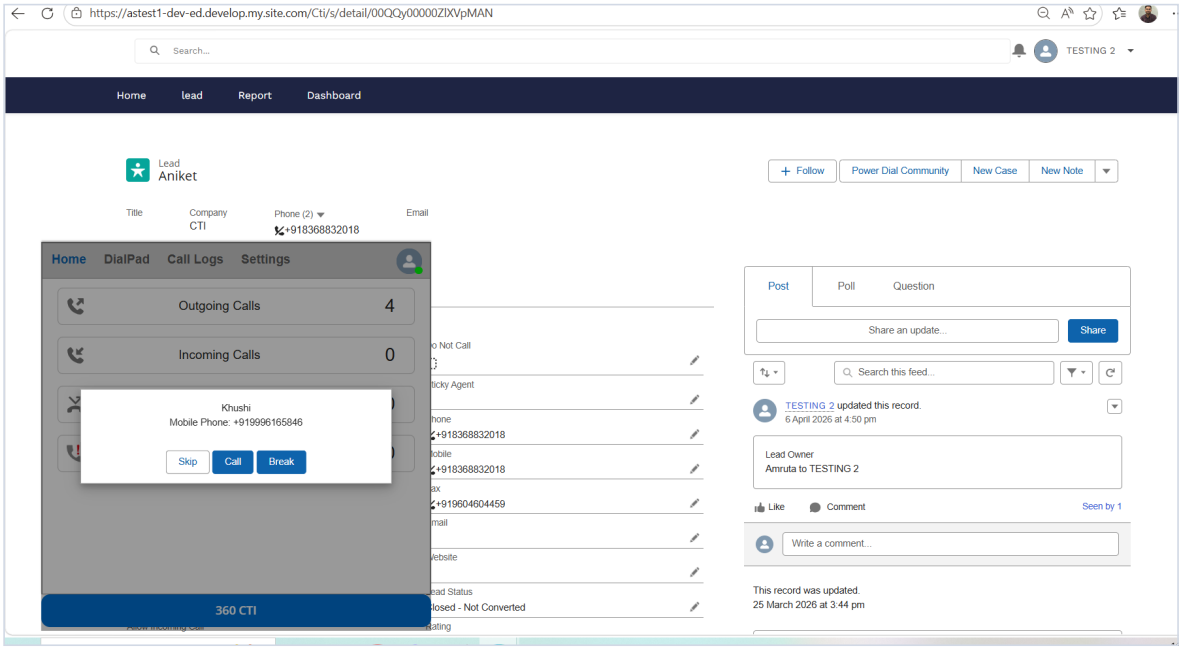


Fig : PowerDial in Community

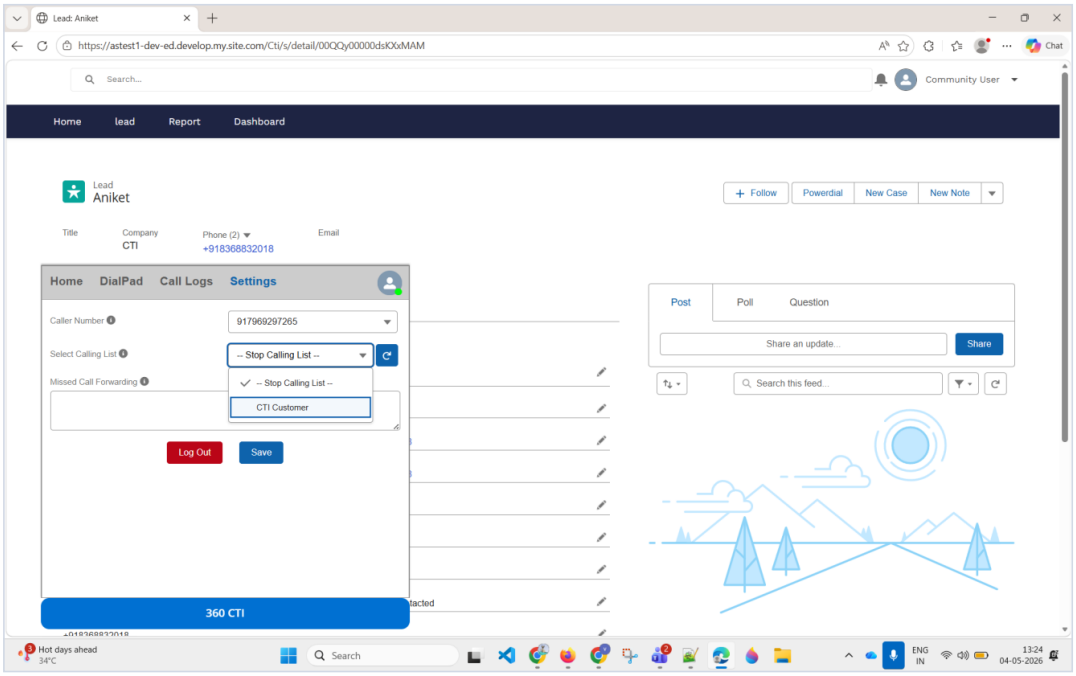


Fig : CallingList in Community

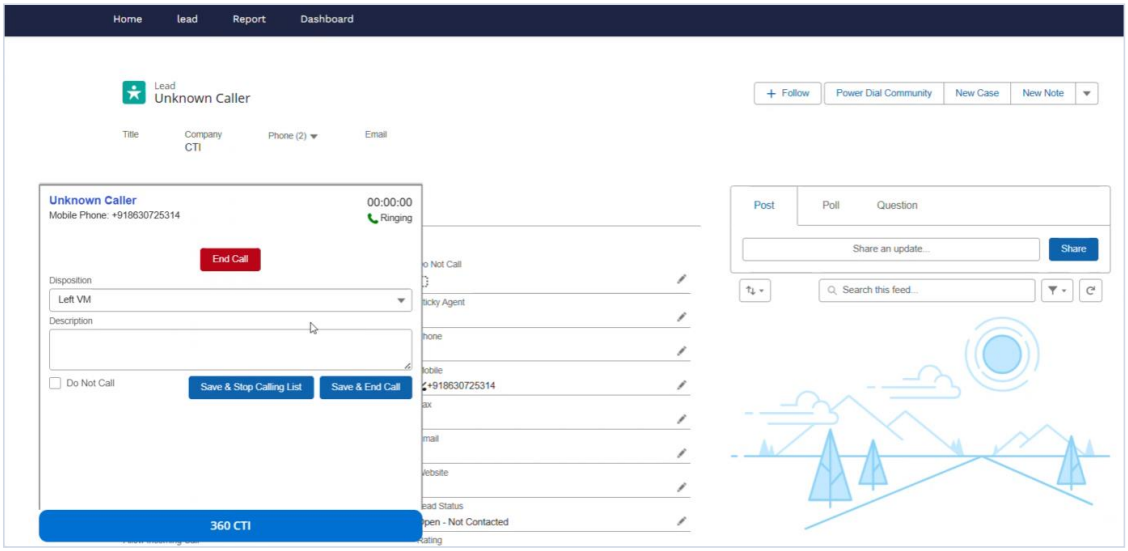


Fig : CallingList in Community (running a Calling List)

Step to setup PowerDial in Community:

1. Go to setup.
2. Click on object manager.
3. Open lead -> Button, links & actions -> New action.
4. Action type: Lightning Web Component.
5. Lightning Web Componant: tdc_360CTI:powerDialCmp (screenshot below)

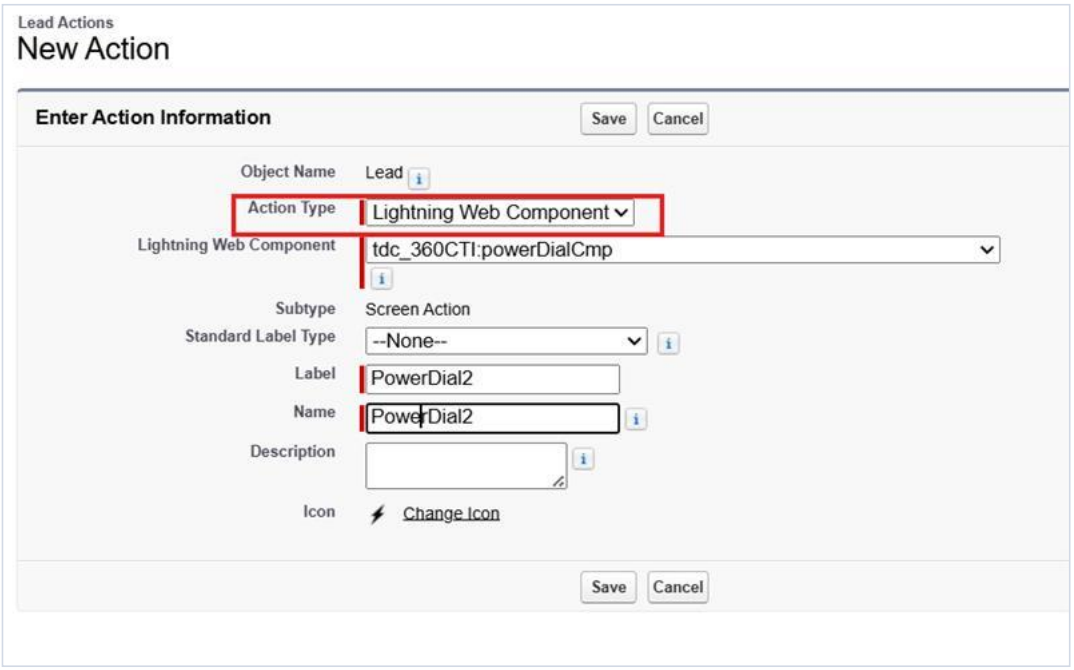


Figure: New Action with tdc_360CTI:powerDialCmp

6. Enter the value in "Label". (Eg: Power Dial Community)
7. Go to the page layout and add the power dial component button. (screenshot below)

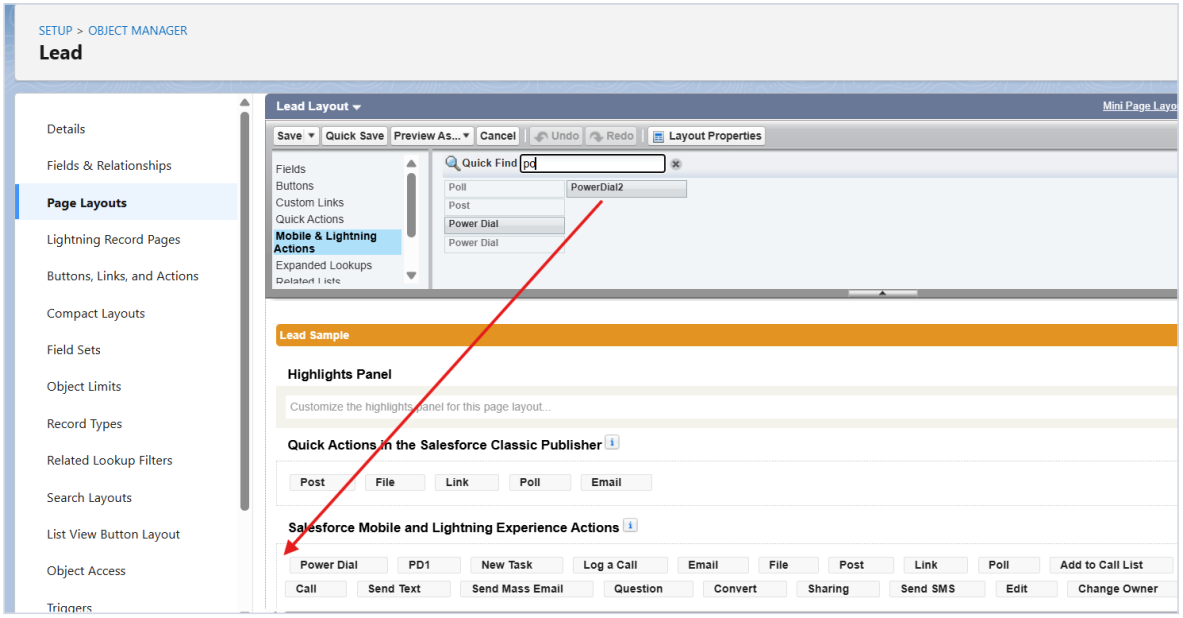


Figure: Adding the Power Dial action to the page layout

8. Go to the "All sites" and open community builder.
9. Click on the home tab dropdown. (Top left side)
10. Search for RedirectAura. (screenshot below)

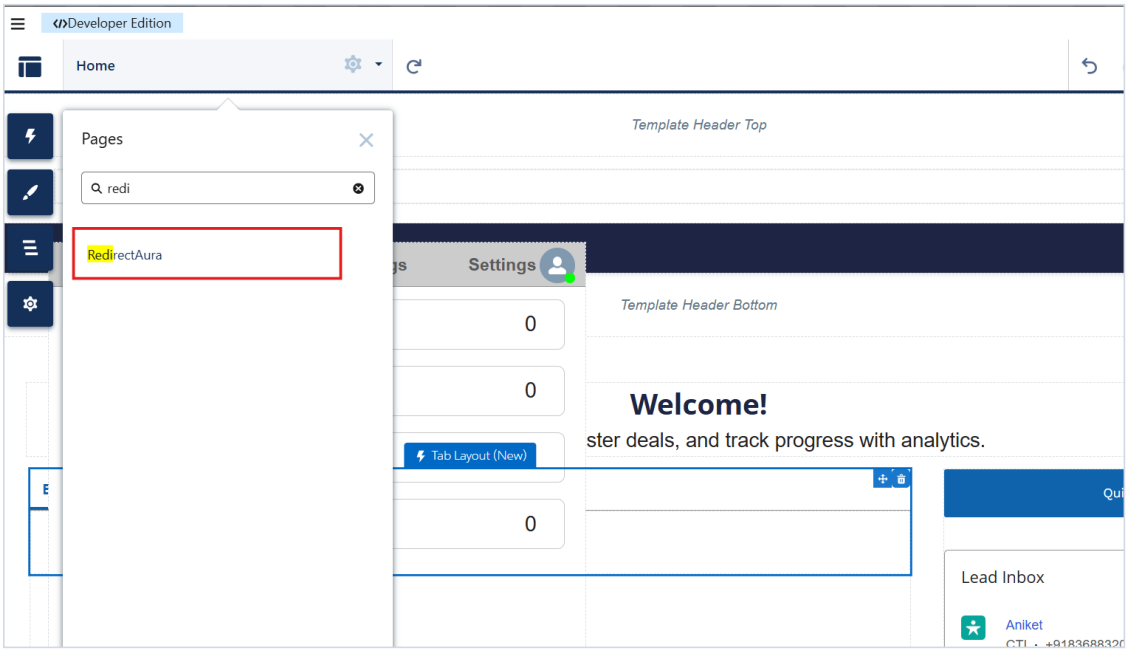


Figure: Searching for RedirectAura

11. Now click on the components.(screenshot below)

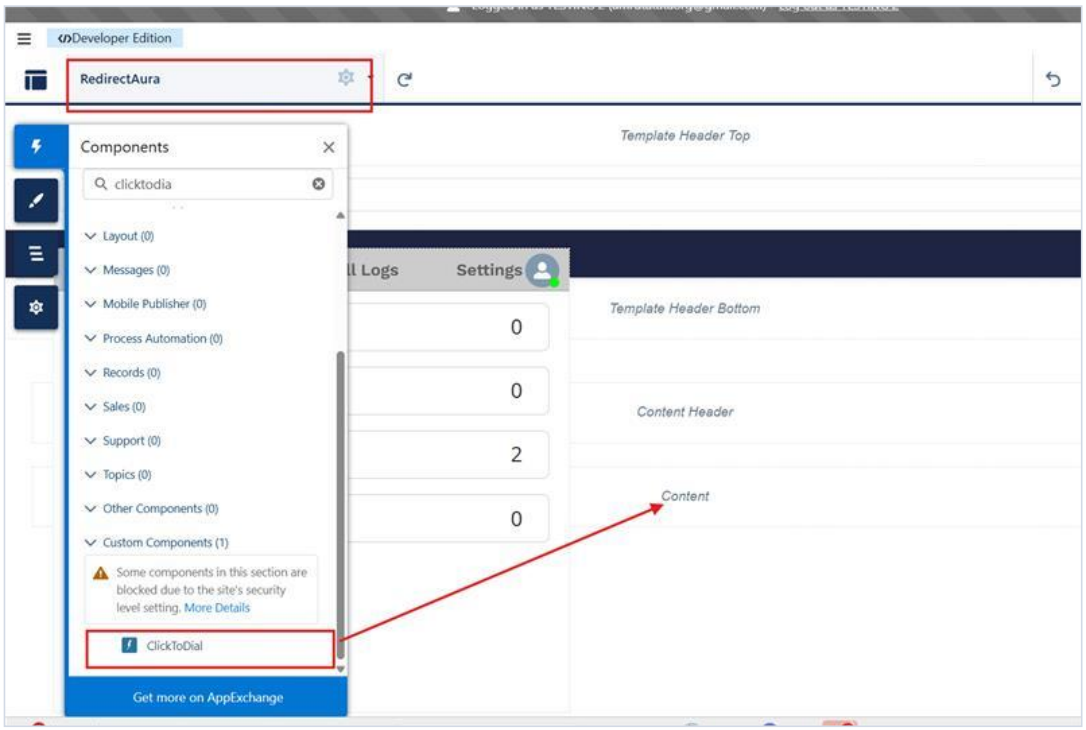


Figure: ClickToDial under Custom Components

12. Search "ClickToDial", Drag the same and drop under "Content".
13. Publish the same.
14. Login to the community with community partner user.
15. Go to the lead and open any record.
16. Click on Power Dial community button.
17. Select the list view. (screenshot below)

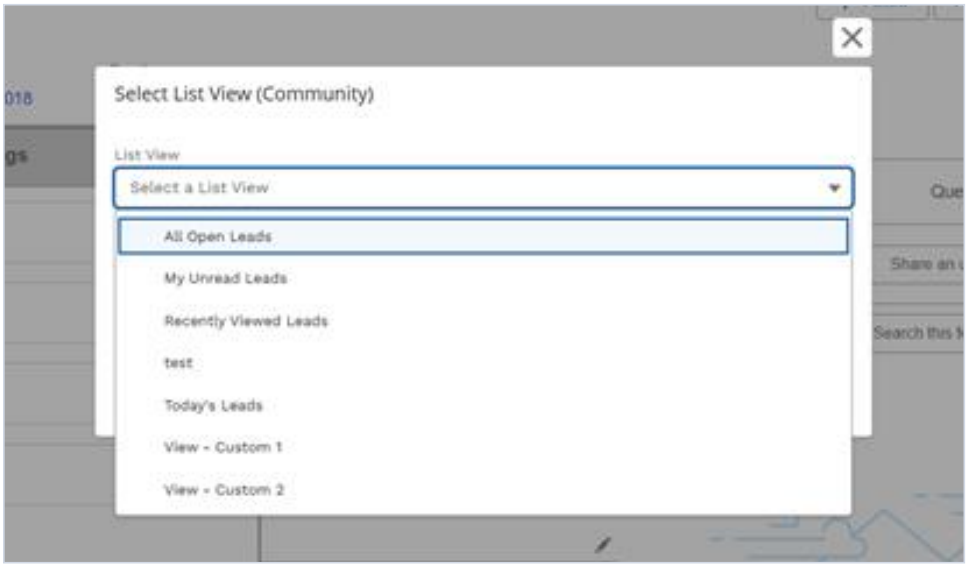


Figure: Select List View (Community)

10. How Incoming Calls Are Routed

Routing decides who receives an incoming call. 360 CTI gives you three tools. Choose the one that fits each number:

Tool	Best for	Chapter
User Config	Simple set-ups: one number, a primary user, an optional group, and missed call forwarding. Steps follow a fixed order.	10
Call Routing (NEW)	Flexible routing you design step by step, for one or many numbers: business hours, holidays, several groups in sequence, personalised voicemail.	11
IVR	Menus where callers press keys ("Press 1 for Sales"), plus data-driven routing with the Validate step.	12

> **Note**
> Whatever tool you use, every number is always listed in User Config, which is the central place to see all numbers and their configuration. Call Routing and IVR settings are applied to User Config automatically, so they never conflict.

> **Note**
> For every incoming call, the system first checks **Out of Office** (the time range set in User Config). After that, the configured routing applies.

10.1 Routing with User Config

UPDATED **For:** Admins **Where:** CTI Setup › User Config › Edit

In User Config, calls follow a fixed order: the sticky agent (or last communicator) is tried first, then the primary user or group, and finally missed call routing. Each part is explained below.

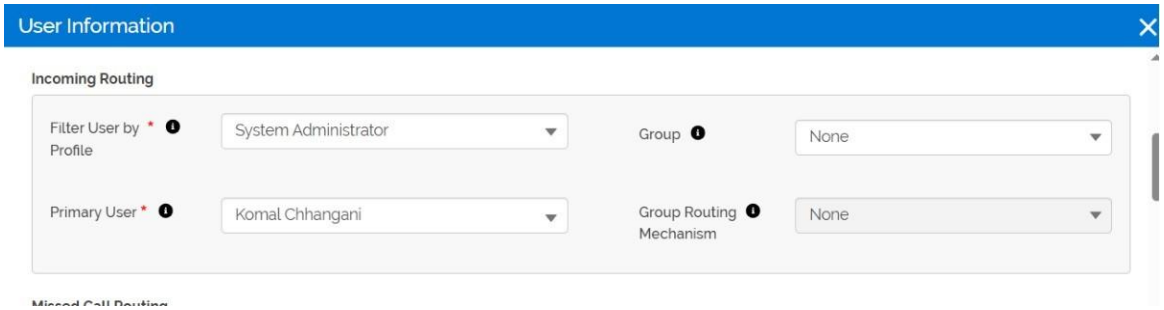


Figure 26: Incoming Routing section in User Config

Primary user

The user the number belongs to. If no one else is configured, calls ring the primary user. If they answer, the task is assigned to them; if they reject or miss it, a missed call task is assigned to them.

Group

Select a group to share incoming calls among its members using a group routing mechanism (see 10.2). The primary user must be a member of the group. The member who answers gets the call task. If nobody

answers, the missed call task goes to the primary user.

Missed call routing

Decide what happens when the call is not answered (you are busy, Away, Offline or on another call). Choose **one** of:

- **Missed Call Forwarding** — forward the call to up to three numbers (comma-separated). The task goes to the user linked to the number that answers. You can also set forwarding numbers from the softphone **Settings** tab.
- **Voice Message** – play a recorded message, then end the call. A missed call task is assigned to the primary user.
- **Voicemail** (NEW) — play a message followed by a beep so the caller can leave a voicemail. A **Voicemail Drop** task is assigned to the primary user. If the caller hangs up before the beep, a missed call task is created instead.

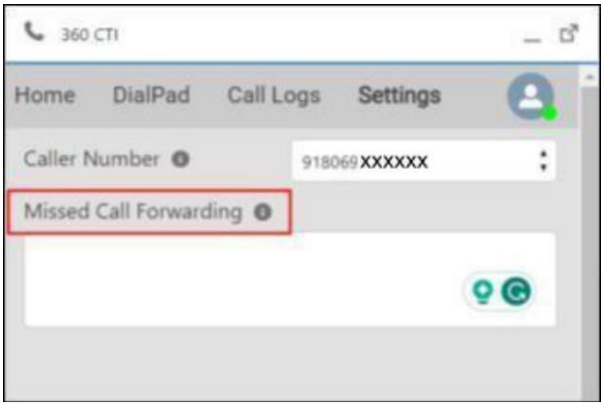


Figure 28: Missed call forwarding from the softphone Settings tab

> **Note**
> Voice messages and voicemails in User Config apply to the primary user. Personal My CTI Setup voicemail is not used here, because the provider only offers Accept and Reject for these calls.

Out of Office

UPDATED

Set when a number is out of office and what happens to calls during that time.

Field	What it does
Enable Out Of Office	Turns on out-of-office handling for this number.
Enable Business Hours	Use Salesforce Business Hours instead of a manual time range.
Days / Day Range	The days of the week the rule applies to.
Time Range From / To	Start and end time on those days.
Start Date / End Date	The period the rule is active.

Field	What it does
Route To	**Group** (ring a group using a routing mechanism) or **Voice Message** (play a message, then end the call; a missed call task goes to the primary user).

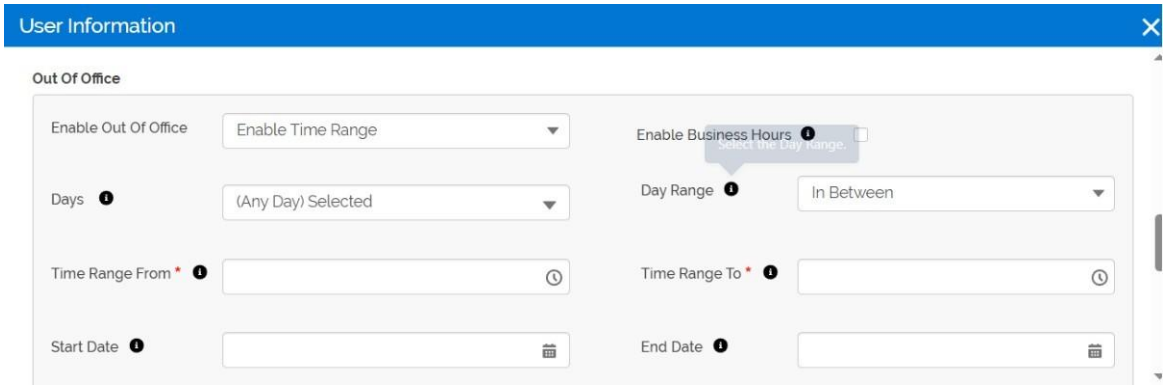


Figure 29: Out of Office section

10.2 Group routing mechanisms

UPDATED **For:** Admins

Wherever you route to a group — User Config, Out of Office, IVR or Call Routing — choose how members are rung. The options shown can vary slightly by feature (for example, IVR dark hours offer Simultaneous and Round Robin).

Mechanism	How calls are shared
Round Robin	Rings members one at a time in turn. If A, B and C are in the group and B answers a call, the next call starts with C.
Simultaneous	Rings group members at the same time. The first to answer takes the call. Now also supported for **SIP** numbers. The number of members rung at once depends on your telephony provider.
Random	Rings a group member random.
Sequential	Rings to Group member as per the priority, away/offline/on call user will skip from the calling
Longest Wait Time	Rings the member who has gone longest without a call.

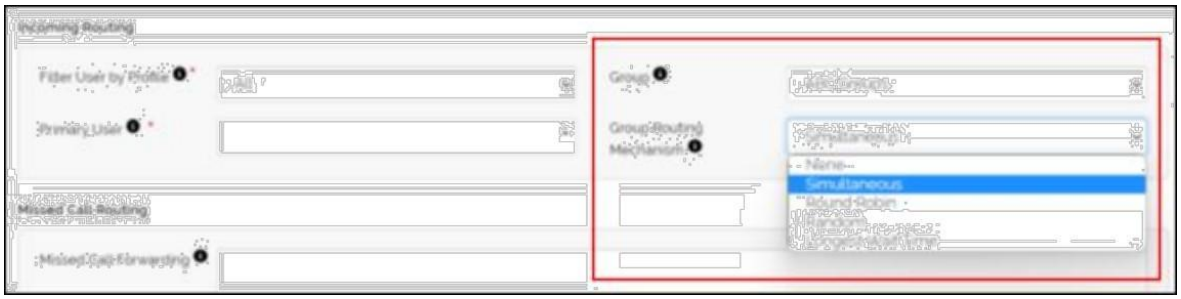


Figure 30: Choosing a group routing mechanism

Create and manage groups

See 19.4 for how to create groups and add or remove members.

10.3 Last Communicator and Record Owner

For: Admins

Last Communicator routes a returning caller to the agent they last spoke to, so they do not have to repeat themselves. The agent already has the context, which speeds up resolution and builds trust. **Record Owner** routes the call to the owner of the matching record.

Ownership options

These General Settings options change who receives and owns incoming calls. They appear once enabled for your org by 360 CTI Support. Only **one** can be turned on at a time.

Setting	What it does
Disable Last Communicator	Calls are never routed to the last communicator; they go straight to the group.
Enable Sticky Agent As Owner	The call tries the sticky agent first. If they are unavailable, the call ends and the missed call task is assigned to the sticky agent.
Enable Last Communicator As Owner	The call tries the last communicator first. If they are unavailable, the call ends and the missed call task is assigned to the last communicator.

10.4 Sticky Agent (now with multiple agents)

UPDATED **For:** Admins

A sticky agent is a specific user who should always receive calls from a particular customer first. You set it in a **Sticky Agent** field on the customer's record (on any object).

New: You can now list several sticky agents in priority order.

1. Create a **Text Area** field for Sticky Agent on the object (a text area gives room for several IDs).
2. On the record, enter the Salesforce user IDs (15 or 18 characters) separated by commas, in the order they should ring.
3. When the customer calls, the first sticky agent rings. If they do not answer, the second rings, and so on.
4. If no sticky agent answers, the call continues with your normal routing (User Config, IVR (Sticky Agent than group) or Call Routing).

- A sticky agent is skipped if they are not Online, do not have access to the number, or have no licence.
- If both a sticky agent and a last communicator exist, the **sticky agent** has priority.
- There is no fixed limit, but two or three agents is the recommended maximum. For more, use a group.

> **Example**
> Every call from a key account should go to Atul first, then Sikha. If neither answers, the whole 10-person sales group rings. A group alone cannot guarantee that order — multiple sticky agents can.

> **Limitation**
> Sticky Agent applies to **incoming** calls only.

10.5 How your status affects incoming calls

Situation	What happens
You are **Away** or **Offline**	The call is not connected to you. It follows missed call routing (forwarding, voice message or voicemail) if set; otherwise it ends.
You are **Online** but already on a call	A call to your PSTN number is not connected to you and follows missed call routing.
A **voicemail** is set up	The voicemail plays when you are Away, Offline, or already on a call.

10.6 Missed Call Number

NEW **For:** Admins **Where:** CTI Setup › User Config › Edit › Other Settings › Call Direction

Call Direction controls whether a number is used for Incoming, Outgoing or Both. A new option, **Missed Call Number**, turns the number into a "missed call" line:

- Incoming calls are dropped immediately. No message is played.
- A task and call log are created and assigned to the primary user.
- If the caller is not in Salesforce, a record is created as usual through Link Unknown Call (see 6.5).

> **Example**
>
> "Give us a missed call on 98XXXXXXXX to get a callback." Every caller is captured as a lead and a task, at no cost to the caller.

10.7 Blocking numbers

For: Admins **Where:** CTI Setup › General Settings › Other Settings › Blacklisted Numbers

Enter spam or unwanted numbers, separated by commas. Calls from these numbers are not accepted and are not tracked in Salesforce, so agents are not disturbed and your data stays clean.

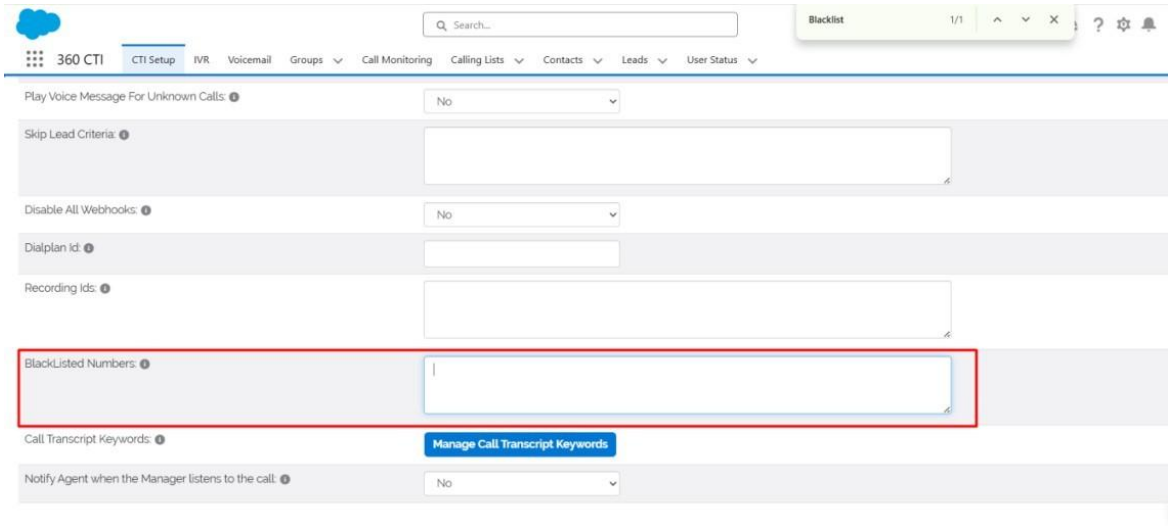


Figure 31: Blacklisted Numbers setting

Additions to 10.2 Group routing mechanisms

NEW **Source:** Release Notes 1.34

Simultaneous Ring — Call Up to 10 Agents at Once

Incoming calls can now ring up to 10 users at the same time. If a group has more than 10 users, the system automatically picks 10 active, licensed users to ring. It also checks how many calling channels are actually free — so if only 5 channels are available out of 10 eligible users, only 5 will be dialed. The call log records why the rest weren't dialed, and if the call is missed, every user who didn't answer is listed in the “Missed By User” field. This works everywhere calls can ring multiple people: User Configuration, IVR, Call Routing, the default Round Robin method, and Missed Call Forwarding.

Additions to 10.4 Sticky Agent

Sticky Agent is also available as a dedicated step under Call Routing → Auto Forward, where it is checked before proceeding to subsequent routing steps. To be configured as a Sticky Agent, the user must have CTI Number access, an active CTI license, and the User must be active. Additionally, the IVR Route To field now includes Sticky Agent and Sticky Agent Then Group, while the IVR Callback Route To field includes Sticky Agent Then Group.

Additions to 10.6 Missed Call Number

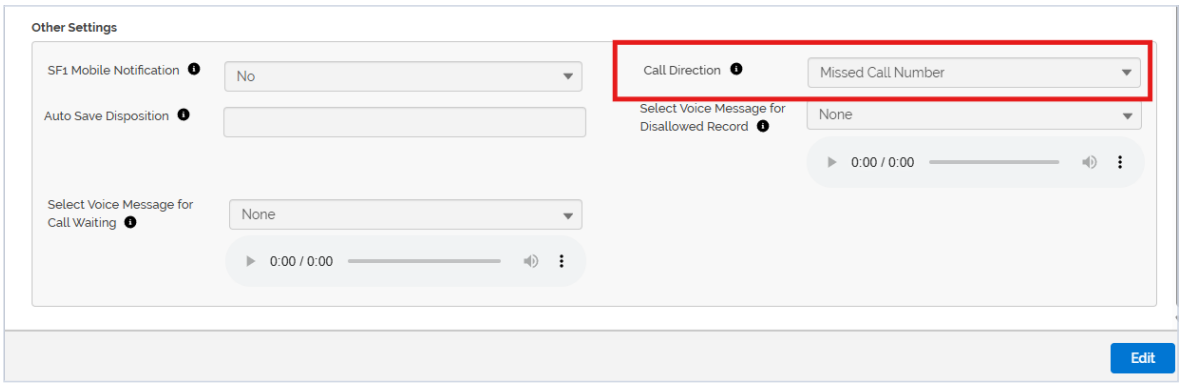


Figure: Call Direction set to Missed Call Number

11. Call Routing

NEW **For:** Admins **Where:** 360 CTI app › Call Routing tab

Call Routing lets you design exactly how incoming calls flow, step by step. User Config follows a fixed order; Call Routing lets you decide which step runs first, what follows, and which step comes last. The Call Routing tab is added automatically with the package.

11.1 Why use Call Routing

- **One set-up for many numbers.** Previously, the same configuration for ten numbers needed ten User Config records. Now one Call Routing can cover all ten.
- **Any order, any number of steps.** Ring a group, then another group, then a third — there is no cap.
- **Business hours, shifts, weekends and holidays** each with their own handling.
- **Personalised voicemail** using each record owner's or last communicator's own greeting.
- **Control of missed calls** – choose who gets missed call tasks and email notifications.
-

> **Tip**
> Call Routing is the recommended approach for new set-ups. Over time, User Config routing options will move to Call Routing.

- **Outgoing Call Access Users:** let some users call out on a company number without receiving its incoming calls.

11.2 Create a call routing

1. Open the **Call Routing** tab and click **New Call Routing**.
2. Fill in the fields below and click **Save**.
3. Add routing steps (see 11.4).

Field	What it does
Call Routing Name (required)	A name for this routing, for example "Main support line".
Primary User	An active, licensed user. Voicemail drops, and missed calls in some cases, are assigned to them.
Numbers	One or more assigned numbers that use this routing.
Missed Call Notification Users	Users who receive an email when a call is missed by every step.
Call Recording	Record **Incoming**, **Outgoing**, **Both** or **None** for these numbers.
Outgoing Call Access Users	Users who can make outgoing calls from these numbers. They do not automatically receive incoming calls.
Missed Call Assigned To	Who gets the missed call task. See the options below.
Call Routing Time Zone	**Company Wise** (your org's time zone) or **Primary User Wise** (the primary user's time zone). Used by time-based and holiday rules.
Follow Holiday Calendars	**No** by default. Set to **Yes** to handle holiday calls differently (see 11.3).

Missed Call Assigned To options

Option	Who gets the missed call task
Last Communicator	The agent who last spoke with the caller. If there is no call history, the primary user.
Primary User	Always the primary user.
Record Owner	The owner of the caller's record (known callers). For unknown callers, the primary user.
User	A specific user you choose from the **Users** field.

> **Example: time zone**
> Your company's time zone is set to the US, but you have an India team. Choose **Primary User Wise** and make the India team lead the primary user, so business hours follow India time.

Screenshot to be added: *New Call Routing form with the fields above.*

11.3 Holiday calendar

When **Follow Holiday Calendars** is **Yes**, calls on a holiday skip the normal steps and follow the **Holiday Calendar Routing Option**:

Option	What happens on a holiday
Mobile	The call is forwarded to one mobile number you enter.
Group	The call rings a group using the group routing mechanism you choose.
Voice Message	A recorded message plays, then the call ends.

11.4 Add routing steps

After saving, click the **+** icon to add steps. Steps run in the order you create them, and you can insert a step between existing ones at any time. The system automatically skips any step that does not apply to a call (for example, Last Communicator when there is no call history).

Step	What it does
Auto Forward	Forwards the call. **Route To** options: • **Number** – a valid 10-digit mobile number. • **User** – one active, licensed user. • **Group** – a group plus a group routing mechanism. • **Sticky Agent** – the sticky agent(s) on the caller's record. Skipped if none is set.
Last Communicator	Rings the agent the caller last spoke to, if they have access to this number. Skipped if there is no call history.
Record Owner	Rings the owner of the caller's record. Runs for known callers only; skipped for unknown callers or inactive owners.
Voice Message & Voicemail	Plays a message or takes a voicemail. Four types — see 11.5.

Step	What it does
Time Based Routing	Runs its own set of steps only during the days and times you choose — see 11.6.
Hangup	Ends the call. Must be the last step; no step can follow it.

Screenshot to be added: *Call Routing detail page with steps added.*

11.5 Voice Message & Voicemail step

Choose a **Type**:

Type	What happens
Voice Message	Plays the selected recording, then ends the call. Turn on **Capture Digit** to save the key the caller presses (for example, "Press 1 if you would like a callback").
Voicemail	Plays the selected recording and a beep; the caller can leave a message. A Voicemail Drop task is assigned to the Call Routing primary user.
Record Owner Voicemail	Plays the **record owner's** personal voicemail from My CTI Setup. For known callers only. Skipped if the owner has not set a voicemail.
Last Communicator Voicemail	Plays the **last communicator's** personal voicemail from My CTI Setup. Runs only if there is call history. Skipped if no voicemail is set.

> **Tip**
>
> Personalised voicemail is a powerful differentiator. A customer who usually speaks to Annu hears "Hi, this is Annu, I'm busy right now — please leave a message after the beep", while another customer hears Atul's greeting. Customers feel they have reached the right person.

> **Note**
>
> One step plays either a message or takes a voicemail, not both. To say "We are not available, please leave a message after the beep", use **Voicemail** with a recording containing those words.
>
> If the caller hangs up **before** the beep, a missed call task is created. If they hang up **after** the beep, a Voicemail Drop task is created, even if they said nothing.
>
> Callers can speak for up to about one minute after the beep.

11.6 Time-Based Routing

Use Time-Based Routing to handle shifts, business hours, evenings and weekends differently. Each time-based rule has its own sub-steps.

Setting	Options
Days	**Weekdays** (Monday–Friday), **Weekend**, or **Any Day** (Monday–Sunday).
Time	**All Day** (24 hours) or a start and end time, for example 10:00 AM to 7:00 PM.

- You can add several time-based rules, one for each shift or period.
- Time ranges for the same days **cannot overlap**. The system shows an error if they do.
- If you add no time-based rules, your steps apply 24 hours a day, 7 days a week.

11.7 Worked example

A company works Monday to Friday, 10 AM to 7 PM. This is how its main number could be set up:

Order	Step	Result
1	Voice Message (greeting)	"Thanks for calling 360 Degree Cloud. This call is recorded. We will connect you shortly." Plays for every call.
2	Time Based Routing: Weekdays, 10:00 AM — 7:00 PM	Sub-steps: **Last Communicator** → **Auto Forward to Group** (Round Robin) → **Voice Message**: "All our agents are busy. We will call you back."
3	Time Based Routing: Weekdays, 7:00 PM — 11:45 PM	Sub-step: **Voice Message**: "Our working hours are 10 AM to 7 PM. We have noted your call and will call you back."
4	Time Based Routing: Weekend, All Day	Sub-step: **Voice Message**: "It's our day off. We will call you on Monday."

With **Follow Holiday Calendars** set to Yes, holidays get their own handling too. **Missed Call Assigned To** decides who follows up on every missed call.

> **Note**
> A voice message as the first step works as a greeting. There may be a delay of one to two seconds before the next step starts. Test your flow before going live.

11.8 Rules to remember

- Steps run in the order shown, and inapplicable steps are skipped automatically.
- Add Last Communicator only once; a second one is skipped.
- Hang Up must be the final step. After a Voice Message step, the call ends automatically.
- Capture Digit is available only on the **Voice Message** type.
- The ringback tone the caller hears while agents are being rung is controlled by the telephony provider and cannot be changed in the app.

Additions to 11. Call Routing

NEW **Source:** Release Notes 1.34

Call Routing steps

Steps can be added at the start or end of a routing sequence using Add First Routing Step and Add Last Routing Step, and reordered, edited, or removed inline.

- Hangup: Disconnect the caller call with or without Voice message.

Capture Key Presses in Call Routing's Voice Message Step

The Voice Message/Voicemail step in Call Routing now includes a Capture Digit toggle. When enabled, the system captures a single digit pressed by the customer during the Voice Message step and stores it in the Key Pressed field of the call log. The key press is captured only when the Capture Digit toggle is enabled and applies only to the Voice Message case.

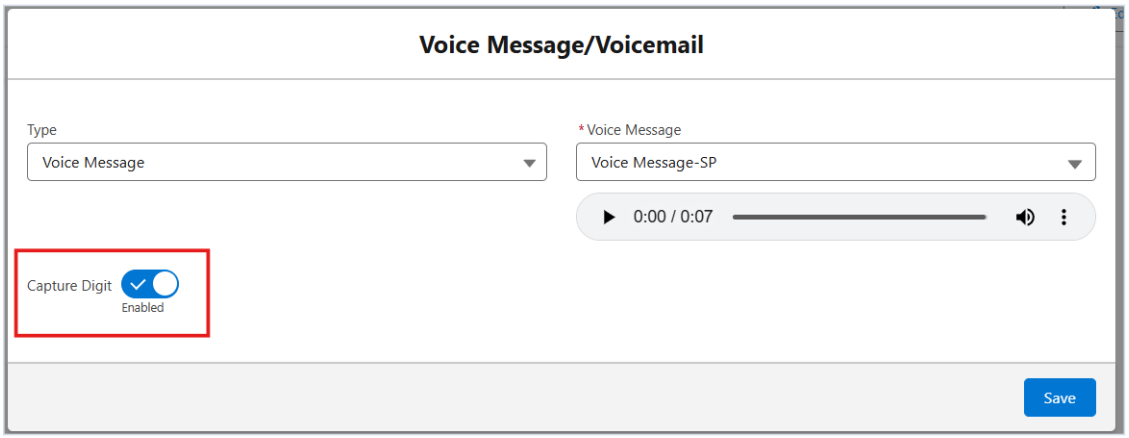


fig. Capture Digit Toggle on Voice Message/Voicemail Step

Record Owner & Last Communicator Voicemail in Call Routing

The Voice Message/Voicemail step in Call Routing now supports two additional options:

- Record Owner Voicemail
- Last Communicator Voicemail

For Record Owner Voicemail, the system checks the record owner's My CTI Setup page for a configured voicemail greeting. If a greeting is available, it is played to the customer, who can leave a message after the beep.

If no voicemail greeting is configured, the system plays the record owner's voice message, if available. If neither is configured, the call is disconnected without playing a message.

The resulting voicemail or voice-message task is assigned to the Record Owner. For missed calls, the task is assigned to the user configured in Call Routing.

The same process applies to Last Communicator Voicemail, where the voicemail greeting and voice message are checked for the Last Communicator, and the resulting task is assigned accordingly.

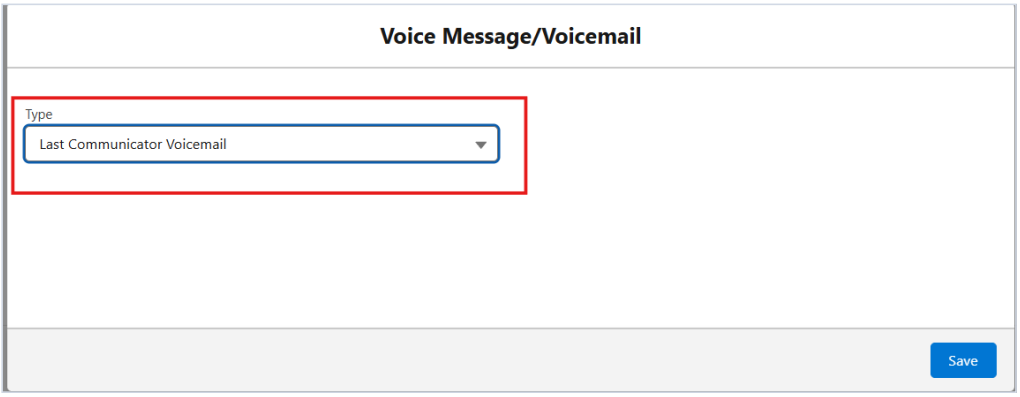


Fig. Last Communicator Voicemail

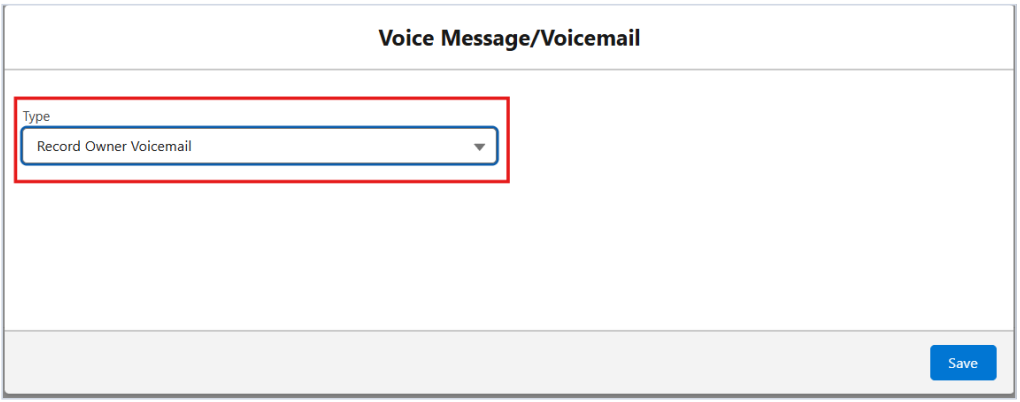


Fig. Record Owner Voicemail

Recordings Must Match Your Call Routing/IVR's Provider

Voice recordings are now tagged by provider:

- TW – International
- SP – SIP
- TF – Teleforce

For Number-less Call Routings, a new field allows you to select India or International calling.

- International: Only International recordings are available.
- India: Both SIP and Teleforce recordings are available.

If a recording from a different provider is selected—for example, a SIP recording in a Teleforce-based setup—the system displays an error while saving, indicating that the recording is not compatible with the selected Call Routing or IVR.

12. IVR (Interactive Voice Response)

An IVR answers calls automatically, plays menus, and routes callers based on the keys they press — for example, "Press 1 for Sales, press 2 for Support". It reduces waiting time and gets callers to the right person without manual effort.

> **Important**
> A number used for an IVR should not be used for any other purpose.

12.1 Set up an IVR

UPDATED **For:** Admins **Where:** 360 CTI app › IVR tab

1. Open the **IVR** tab and select the number to use.
2. Set the IVR options, such as the greeting and the **No Response** message ,Hangup Message, Wrong Entry Message (played automatically when the caller presses nothing).
3. Set the **Primary User** and, if needed, an IVR-level **Voice Message** (see below).
4. Add IVR entries — one for each key the caller can press (see 12.2).
5. Save and activate the IVR.

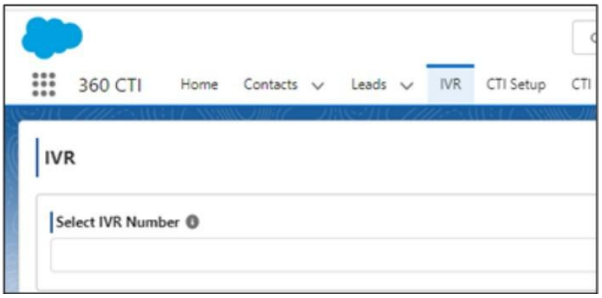


Figure 32: Selecting a number for the IVR

New IVR-level settings

Field	What it does
Primary User (NEW)	One active, licensed user for the IVR. Voicemail drops from this IVR are assigned to them.

Field	What it does
Voice Message / Voicemail (NEW, optional)	Plays when a call routed by an IVR entry (for example, to a group) is not answered. With voicemail, the caller can leave a message after the beep.
Missed Call Assigned To	Who receives missed call tasks from the IVR, for example when a caller hangs up before the voicemail beep.
Enable Holiday Calender	Enable Holiday Calendar allows the IVR to identify configured holidays and apply the defined Holiday Calendar routing. When a call is received on a configured holiday, the IVR follows the selected holiday route, such as playing a Voice Message/Mobile/Group/Voicemail. On non-holiday dates, the call follows the normal IVR routing flow.
Enable Dark Day	Enable Dark Days allows the IVR to identify configured dark days and apply the defined Dark Days routing. When a call is received on a configured dark day, the IVR follows the selected dark day route, such as playing a Voice Message, routing the call to a Mobile number or Group, or sending the caller to Voicemail. On non-dark days, the call follows the normal IVR routing flow.
Enable Dark Hours	Enable Dark Hours allows the IVR to identify the configured dark hours and apply the defined Dark Hours routing. When a call is received during the configured dark hours, the IVR follows the selected route, such as playing a Voice Message, routing the call to a Mobile number or Group, or sending the caller to Voicemail. Outside the configured dark hours, the call follows the normal IVR routing flow.
Enable Callback	Enable Callback allows known customers to receive a callback without playing the IVR greeting or going through the normal IVR flow. When enabled, the system identifies the customer and routes the callback request based on the configured callback settings. This feature applies only to known customers; unknown customers follow the normal IVR flow.
Auto Save Disposition	Set the time interval in seconds after which the call disposition will be automatically saved if the user does not manually save it. Once the configured time interval is reached, the system automatically saves the call disposition.

12.2 IVR entries and actions

UPDATED **For:** Admins

Each entry links a **digit** to an action in the **Then** field. Entries can have child entries to build multi-level menus.

- **Supported keys:** 0–9 and the star key (*), which is new in this release.
- The # (hash) key is not supported because of a provider limitation.

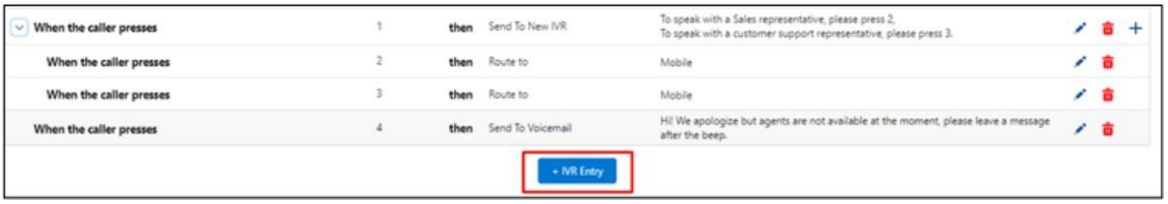


Figure 34: IVR entries

Action (Then)	What it does
Greeting Message	Plays the configured greeting when the key is pressed.
Play Recording	Plays a recording. Turn on **Enable Voicemail Recording** to play the voicemail recording instead.
Play Recording Then Route To (UPDATED)	Plays a message first, then routes the caller — for example, to a user, group, record owner or sticky agent.
Route To	Routes the call. Options include User, Queue (group), Record Owner, Last Communicator, Mobile, Sticky Agent and Call Routing, plus combinations that also ring the Salesforce mobile app or fall back to a queue.
Send To New IVR	Moves the caller to a sub-menu with its own message and entries.
Send To Voicemail	Sends the caller straight to voicemail.
Replay Message (NEW)	Replays the current menu when the caller presses the key. Add it as a child entry under **Send To New IVR**. Example: "To hear these options again, press 3."
Back Level	Takes the caller back to the previous (parent) menu.
Hang Up (NEW)	Ends the call, with or without a closing message. A call task is still created and assigned.
Validate (NEW)	Checks the caller against your Salesforce data and routes based on the result (see 12.5).

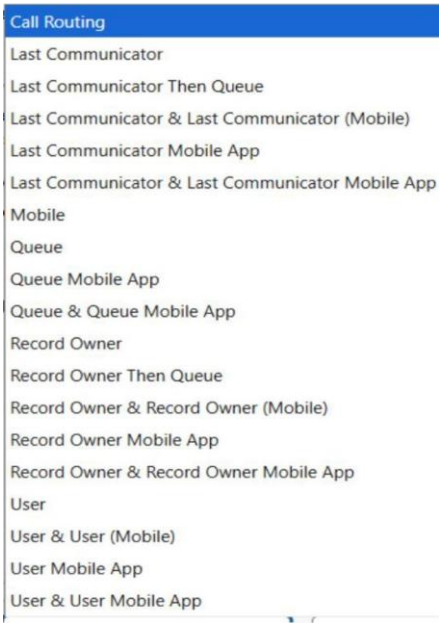


Figure 35: Route To options

> **Note**
>
> **Replay Message vs. Back Level vs. No Response:** Replay Message repeats the *current* menu on request. Back Level returns to the *previous* menu. The No Response message plays automatically when the caller presses nothing.
>
> **Hang Up with a message** is useful to close a branch politely, for example: "Thank you for calling. We will get back to you shortly."

12.3 Enable Holidays and Enable dark hours For IVR Step level

NEW **For:** Admins **Where:** IVR › Route To entry › Edit

Each Route To entry can now have its own holiday calendar and "dark hours" (a break period such as lunch). This gives you control per team inside one IVR.

Setting	What it does
Enable Holiday Calendar	Set to **Yes**, then choose the **Holiday Calendar** and **Route To**: **Voice Message** or **Voicemail**.
Enable Dark Hours	Set a time range (for example, 1:00 PM – 2:00 PM). Calls to this step during that time get the selected Voice Message or Voicemail.

- **Priority:** Holiday calendar first, then dark hours, then normal working hours.
- **Voice message:** plays, then the call ends. A missed call task goes to the IVR's Missed Call Assigned To user.
- **Voicemail:** if the caller leaves a message after the beep, a Voicemail Drop task goes to the IVR primary user. If they hang up before the beep, a missed call task is created.

Additions to 12.1 Set up an IVR and 12.2 IVR entries and actions

NEW **Source:** Release Notes 1.34

IVR Popup Feature

Now, when users click on the “+ IVR Entry” button or icon, a dedicated popup opens for entering details in a structured way.

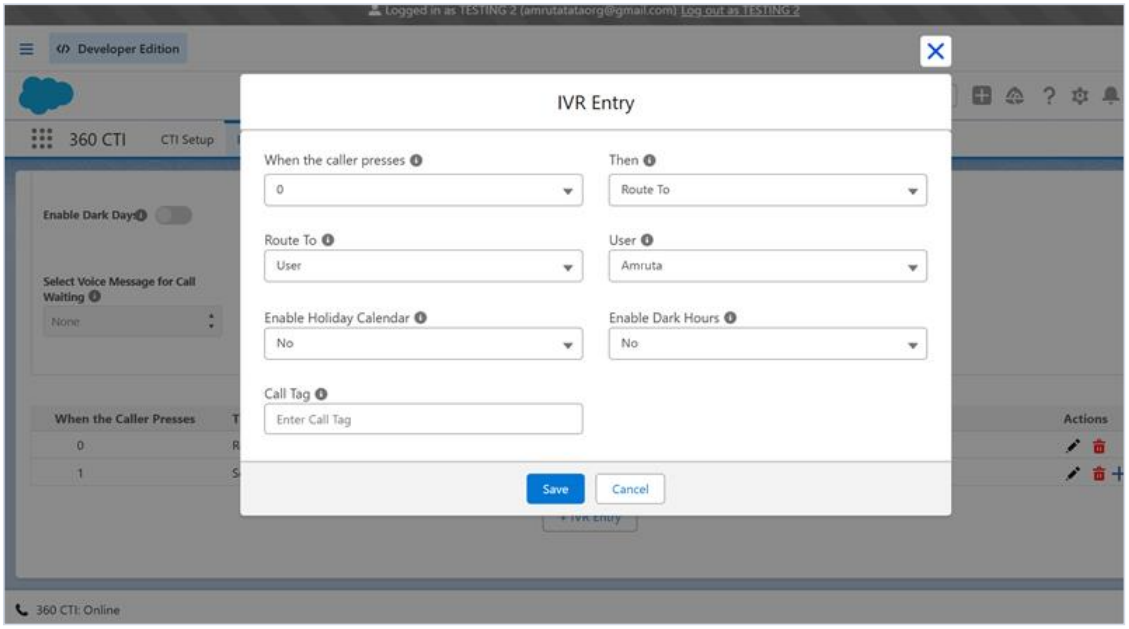


Figure: IVR Entry popup

New Field on IVR: Primary User

IVR now has a Primary User field — a dropdown listing all active, licensed users.



Figure: Primary User on the IVR

Star (*) Key Now Works in IVR

IVR previously didn't recognize the star (*) key as a valid input. It now does, so customers can press * anywhere IVR captures a digit.

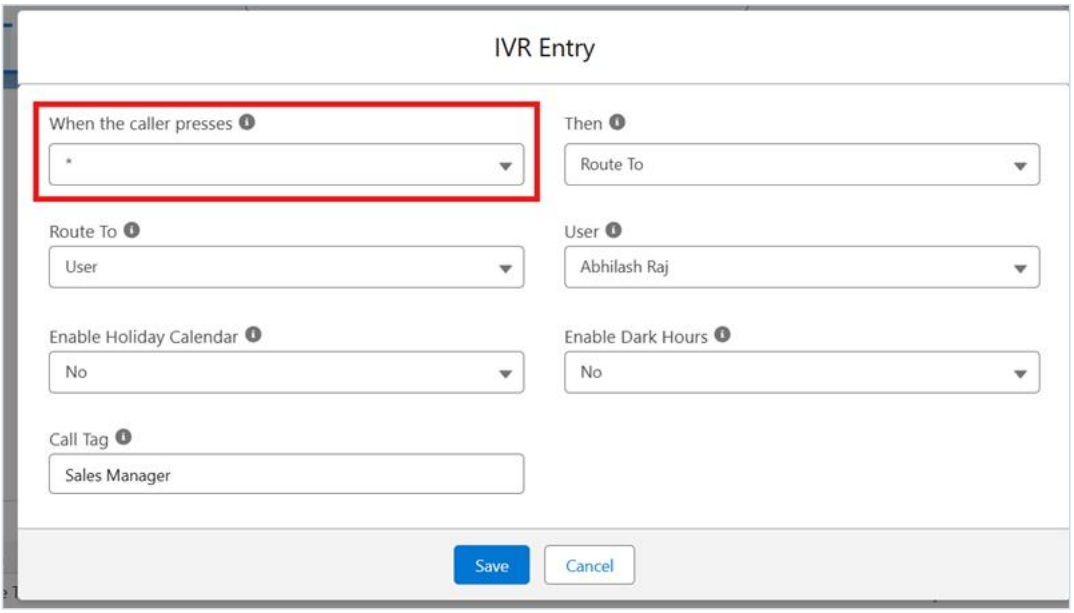


Figure: Star (*) key in When the caller presses

Hang Up a Call by Pressing a Key in IVR

A new IVR option allows customers to end the call by pressing a configured key. When Hang Up is selected in the Route To dropdown, an optional Voice Message field is displayed. If a voice message is configured, it is played to the customer just before the call is disconnected. Voice Message is an optional.

The call is assigned to the user configured in Missed Call Assigned To, and the key pressed by the customer is captured for reference.

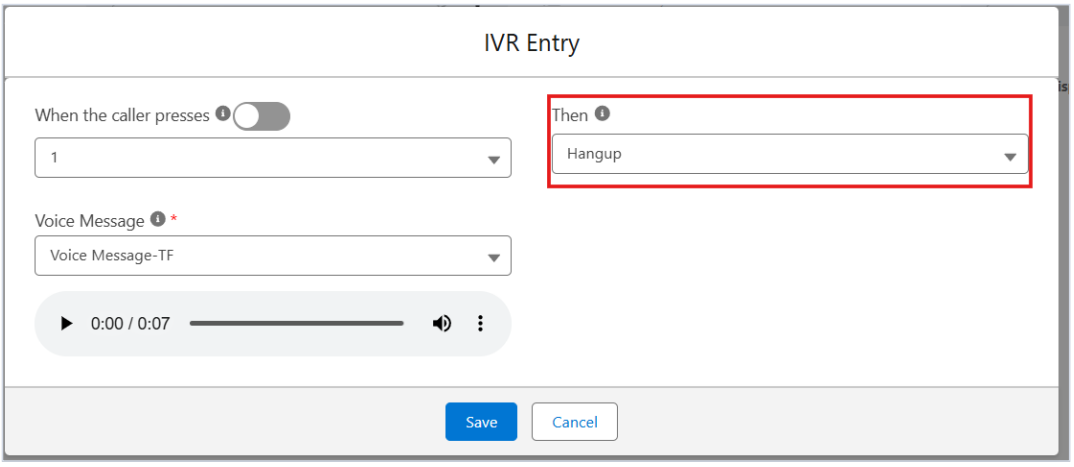


Figure: Hangup action in IVR Entry

Replay a Message in IVR

The IVR Route To step now supports a Replay Message option. This allows customers to replay the previous message by pressing a configured key, such as 9. When the customer selects the configured key, the message is played again.

The Replay Message option is available only for Send To New IVR steps.

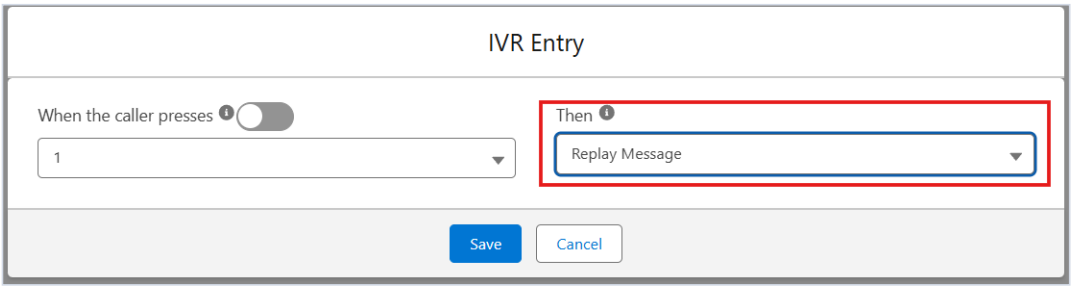


fig. Replay message

Capture More Than One Key Press From Customers (Max DTMF Input)

The IVR and Outbound IVR Flow now support capturing multiple key presses from customers. A new Max DTMF Input field allows admins to define the maximum number of digits the customer can enter. The default value is 1, which maintains the existing behavior.

For the Outbound IVR Flow, the Max DTMF Input field is currently supported only with the SIP provider.

The digits entered by the customer are captured and stored in the Key Pressed field on the Call Log.

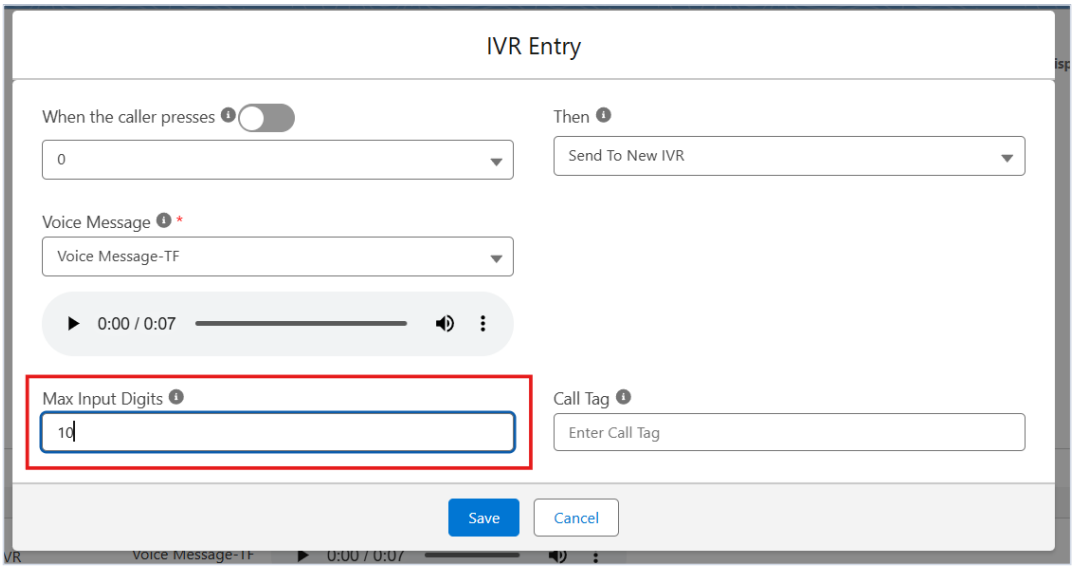


fig. Max Input Digits in IVR

Route Calls (and Callbacks) From IVR Into Call Routing

The IVR Route To and Callback Route To options can now route calls directly to a Call Routing configuration.

For callbacks, when Call Routing is selected, only active Call Routing configurations associated with the same provider number as the IVR are available. Active Call Routing configurations without a provider number are also available.

When call is forwarded in the call Routing and If the call is missed from the call Routing Steps than missed call task and call is automatically assigned to the user configured in the selected Call Routing.

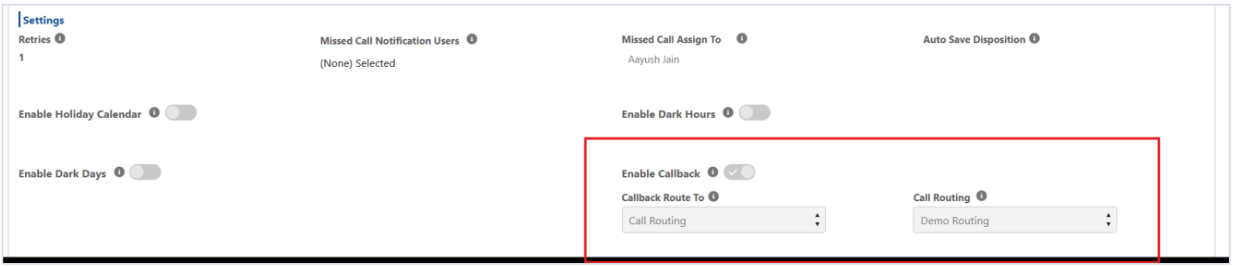


fig.Call routing in Enable Callback Route to

> **Example**
>
> One IVR serves US and India sales teams: "Press 1 for US Sales, press 2 for India Sales". Each step follows its own team's holidays and break times, and callers outside those hours hear the right message or can leave a voicemail.

Screenshot added ? see page 50-A.

12.4 IVR dark hours (whole IVR)

For: Admins

Dark hours for the whole IVR define an after-hours period. Calls received during this time are routed according to the option you choose:

Option	What happens during dark hours
Mobile	Calls go to the mobile number you specify.
Queue	Calls go to a queue (**Dark Hour Route To**) using **Simultaneous** ring (all members at once) or **Round Robin** (one by one).
Voicemail	Calls go to voicemail. Use a robotic voice or a recorded message.

Set the period with **IVR Dark Hours From** and **IVR Dark Hours To**. If missed call notifications are enabled in General Settings, the **Missed Call Notification User** receives an email for missed IVR calls.

12.5 Validate callers with Salesforce data

NEW **For:** Admins

The **Validate** action checks who is calling before routing the call. It looks up the caller in Salesforce and creates branches for each result, so you can route based on real customer data.

How it works

1. Add a **Validate** entry. With **Enable Auto Detection**, the caller's phone number is matched automatically against the object and field you choose (for example, the Account phone field).

Additions to 12.3 Enable Holidays and Enable dark hours For IVR Step level

NEW **Source:** Release Notes 1.34

Enable Holiday & Enable Dark Hours Handling in IVR Entry Level

The IVR now supports Holiday and Dark Hours call handling at the step level.

For Holiday call handling, users can enable the Holiday Calendar and select a Route To option. The Route To dropdown provides two options: Voice Message and Voicemail.

- Voice Message: Plays the configured message to the customer, after which the call is automatically disconnected.
- Voicemail: Allows the customer to leave a voicemail message.

For Dark Hours, users can enable the option and define the Start Time and End Time. A voice message can be configured to inform customers that they are calling outside business hours. After the message is played, the call is automatically disconnected.

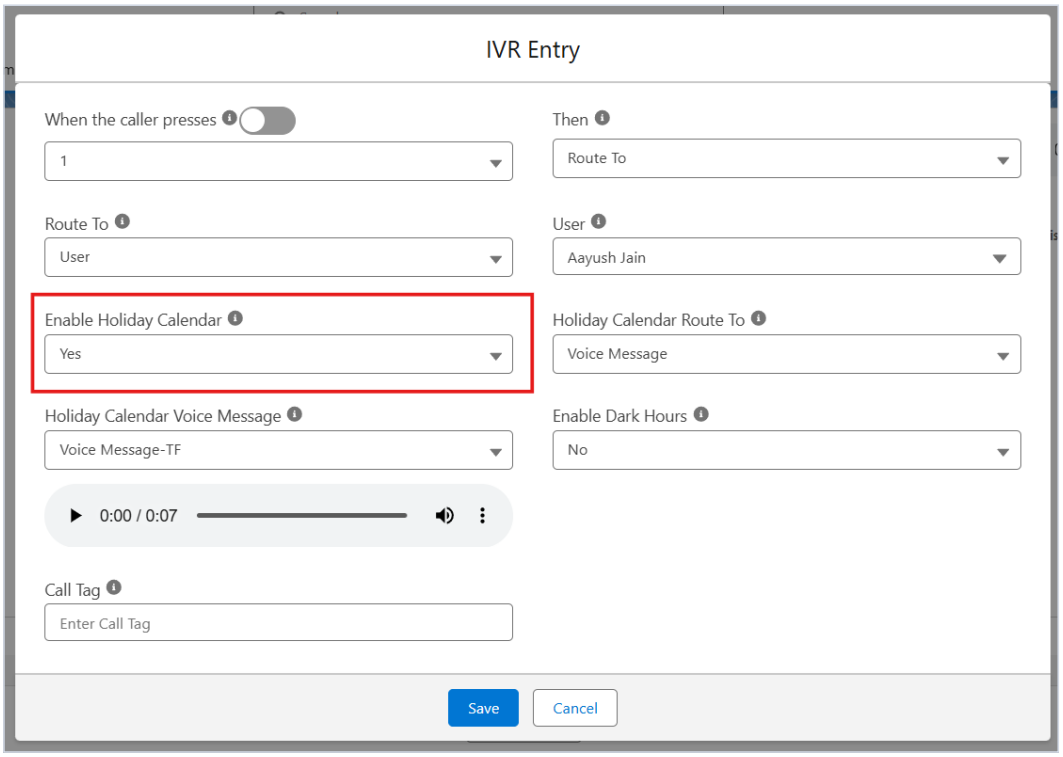


Fig. Enable Holiday Calender

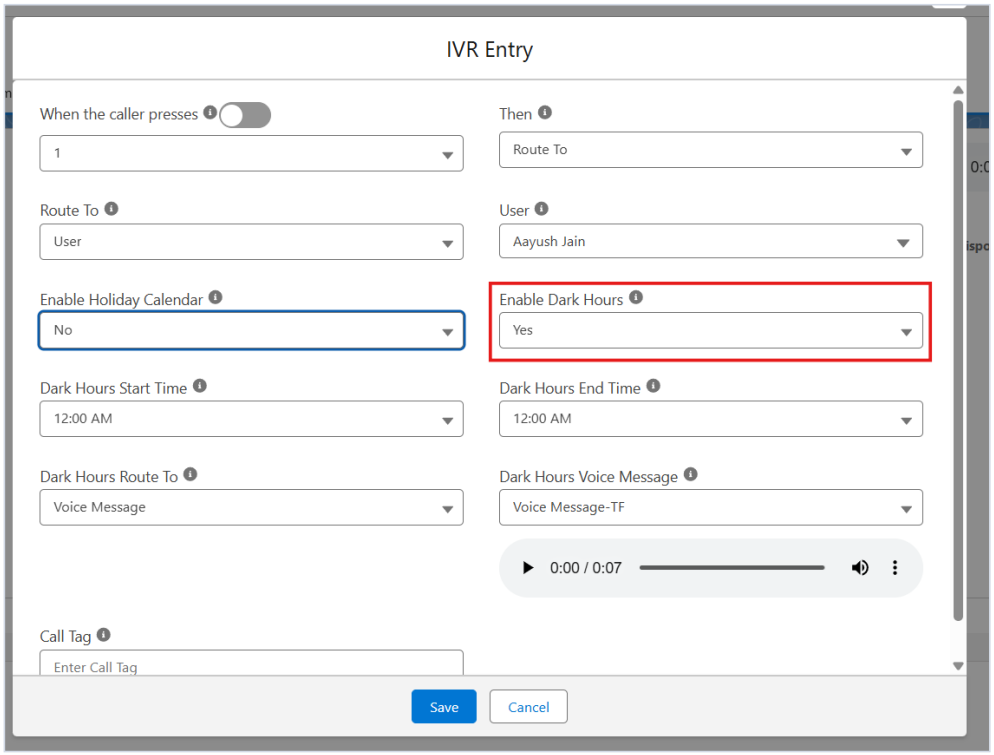


Fig. Enable Dark Hours

2. The IVR creates result branches: **Success** (one matching record), **Success – Multiple Records**, and **Failure** (no match).
3. Under **Success**, route on a field value of the related record. For example, for Case Priority: **Low** → play a voice message; **Medium** → route to an agent; **High** → route to a senior team.
4. Under **Success – Multiple Records**, ask the caller to enter an identifier (for example, their case number) and tell the IVR which object and field to search. Set **Maximum Retries**; after too many invalid entries, a retry message plays and the call ends.
5. Under **Failure**, decide what happens to callers who are not found, for example routing to a general queue.

> **Example**
>
> A customer calls and presses 1 for English. The IVR finds their account and their one open case. Because the case is High priority, the call goes straight to the senior support group.

Screenshots for this section have been added below.

12.6 IVR examples

> **Examples**
>
> **VIP treatment:** a caller whose record has an owner is connected straight to that owner, skipping the menu. A caller who called yesterday goes back to the last agent they spoke to. If that agent is busy, the call moves to the team queue after a few rings.
>
> **No more missed leads:** the IVR tries the record owner or last communicator first, rings their mobile app at the same time, and then passes the call to the whole queue.
>
> **After-hours care:** a retailer uses dark hours so after-hours callers are routed to an on-call mobile, a queue or voicemail, depending on the key they press.

Additions to 12.5 Validate callers with Salesforce data

NEW **Source:** Release Notes 1.34

Record Validation within IVR

Introduced a Record Validation feature that validates user input in real-time during IVR interactions. When a call is received, the system captures the input, validates it against configured records, and proceeds based on the match. If validation succeeds or fails, the flow will continue automatically.

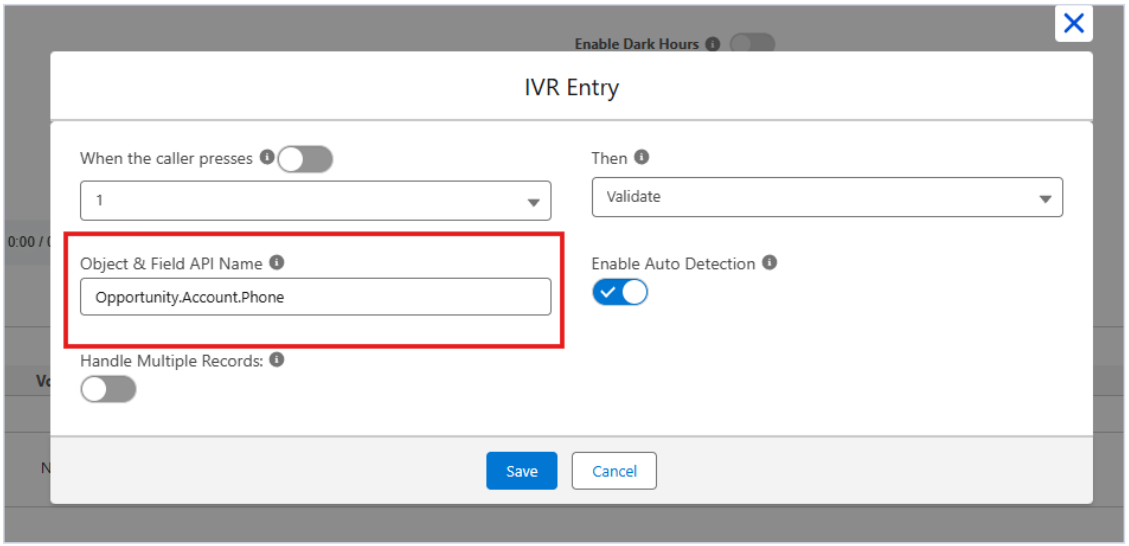


Figure: Validate entry with Object & Field API Name

Example:

- When the customer presses a digit in the IVR menu (for example, press 1), the system moves to the **Validate** step.

  At this stage, the system will search the customer's record based on Field (**Object & Field API Name**) value.

  In the above example:
  `Opportunity.Account.Phone`
- If a matching record is found, the **Success** step will be executed. If no matching record is found, the **Fail** step will be executed based on the configured IVR flow.

Field Descriptions

- **Object & Field API Name**
  Defines the object and field api name which is used for validating the caller's input during the IVR interaction.

Format:
`ObjectAPIName.FieldName1,FieldName2`

Note: This feature supports child-to-parent lookups up to 2 levels deep.

For example: `Opportunity.Account.Phone`

- **Opportunity** = Child Object
- **Account** = Parent Object linked with Opportunity
- **Phone** = Field from the parent Account object

This means the system can fetch the **Phone number from the related Account record through the Opportunity object**.

- **Enable Auto Detection**
  When Auto Detection is enabled, then the system automatically validates customer records based on the (Object&Field API Name) Field value.

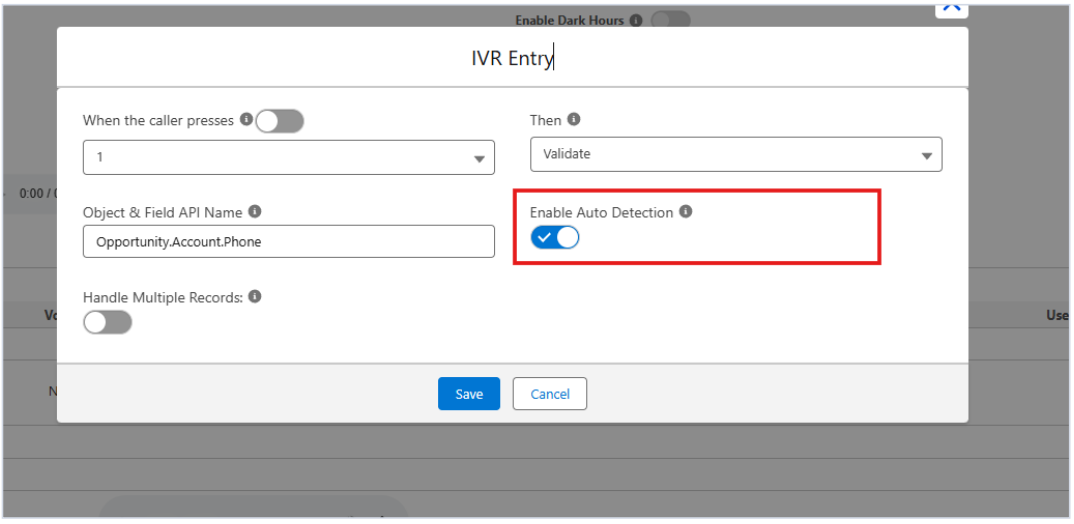


Figure: Enable Auto Detection

- **Retries**
  Defines how many times a caller can enter the input again to validate their details before the system moves to the next step.

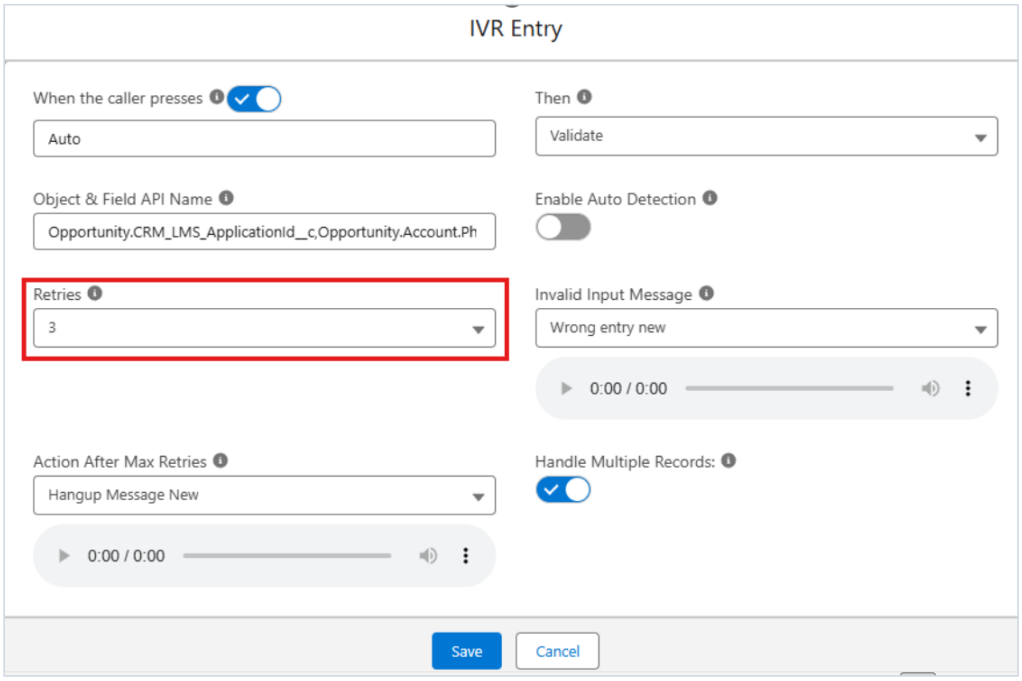


Figure: Retries, Invalid Input Message and Action After Max Retries

- **Invalid Input Message**
  If the customer's entered input does not match with the field value (Object&Field API Name), then the system plays an invalid input voice message and asks the caller to try again.
- **Action After Max Retries**
  Defines the action performed once all retry attempts are exhausted then the system will play the action after max retries voice message and the call will get disconnected.
- **Handle Multiple Records**
  When this option is **enabled**, the system processes all matching records for the caller's input. When it is **disabled**, the system processes only a single matching record and continues with the normal IVR flow.

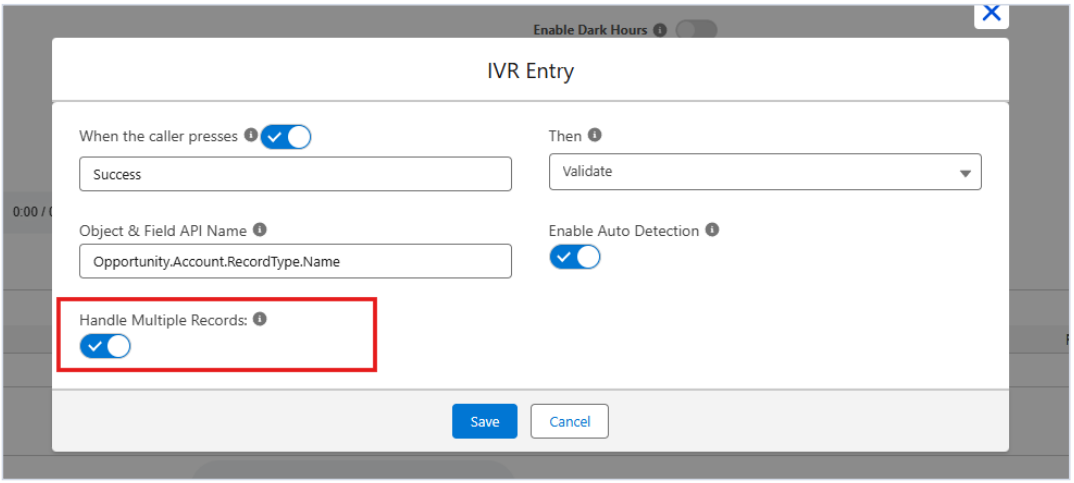


Figure: Handle Multiple Records

Keyword Based Routing

Keyword-Based Routing enables the IVR system to identify specific keywords, configured values during the interaction, and automatically route the call to the relevant IVR flow based on the value present in the field (Object & Field API Name). If the value is not found in any IVR sub step, then the success or failure steps are executed based on whether the record is found or not.

Note:

1. Keyword Based Routing only works after validation steps.
2. Below step gets created automatically when a 'Send To New IVR' entry is created with more than 1 max input digits value:

   When the (Max Input Digits) field value in the parent "Send to New IVR" step is set to a number greater than 1, the system expects a multi-digit input from the user. Then the system will search for the keyword "Auto" in the keyword field that triggers this step automatically upon receiving such multi-digit input.

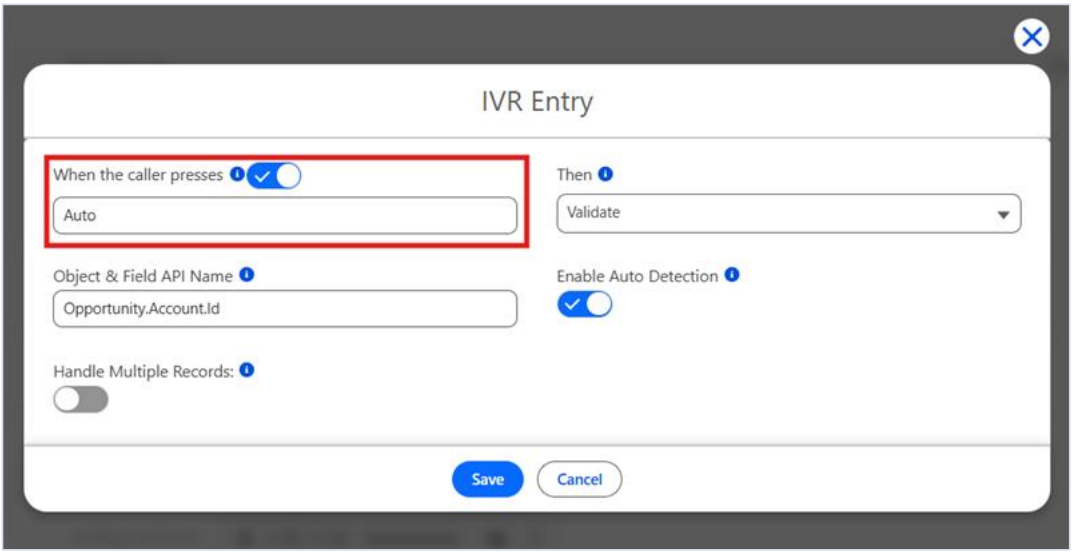


Figure: "Auto" keyword step

For example:

- If the customer's record is validated and we get the value present in the field as **Corporate** (Object & Field API Name), then the step with **corporate** keyword will be followed. If no matching keyword step is found, the system will proceed to the configured success or failure step based on whether the

record was identified successfully or not.

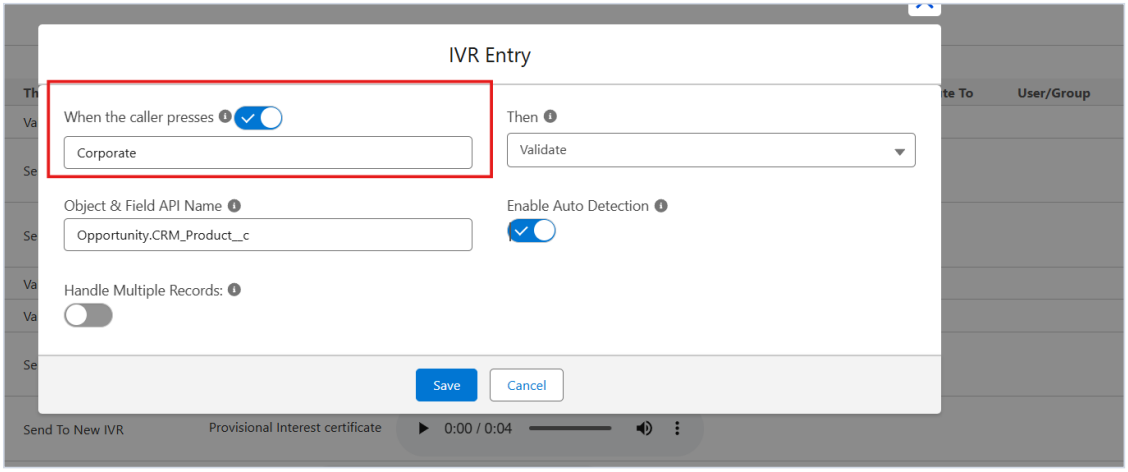


Figure: "Corporate" keyword step

13. Voice Messages and Voicemail

13.1 Voice message or voicemail?

	Voice message	Voicemail
What the caller hears	A recorded message.	A recorded message, then a beep.
Can the caller respond?	Only by pressing keys, where Capture Digit is available.	Yes — they can record a spoken message after the beep.
What is created	A missed call task.	A **Voicemail Drop** task if they hang up after the beep; a missed call task if they hang up before it.
Use it for	Information: office closed, holiday, "we will call you back".	Collecting messages from callers.

13.2 Manage recordings in the Voicemail tab

UPDATED **For:** Admins **Where:** 360 CTI app › Voicemail tab

All voice messages and voicemail greetings are managed in the **Voicemail** tab. Recordings you create, upload or delete here are now **synced automatically with the telephony provider** — no separate set-up at the provider is needed.

Action	How
Record	Click record, speak your message, stop, give it a name and click **Save**. Recordings can be up to 30 seconds.
Upload	Click **Upload**, choose an **MP3** or **WAV** file (up to 60 seconds), give it a name and save.
Delete	Delete a recording here to remove it from the provider as well.

- Each recording must have a **unique name**.
- Messages can also use a robotic voice (male or female) where the feature offers it.
- Recordings can be used anywhere in the app: greetings, IVR, Call Routing, User Config, My CTI Setup, call transfer and Outbound IVR Flows.

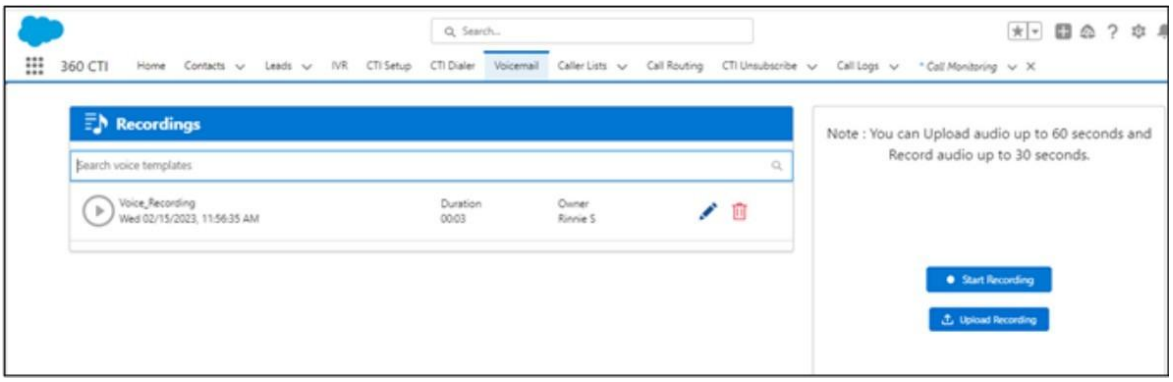


Figure 37: Voicemail tab

Screenshot added ? see page 52-A.

Additions to 13.2 Manage recordings in the Voicemail tab

NEW **Source:** Release Notes 1.34

Admins can now upload, view, and delete Voice Messages directly from Salesforce, with changes automatically synced to the provider portal.

This removes the dependency on the previous Custom Setting, as the Voice Message options are now available under Voicemail Tab.

For customers using both VOIP/PSTN and an International Number, uploading or deleting a Voice Message will automatically update the recording for both.

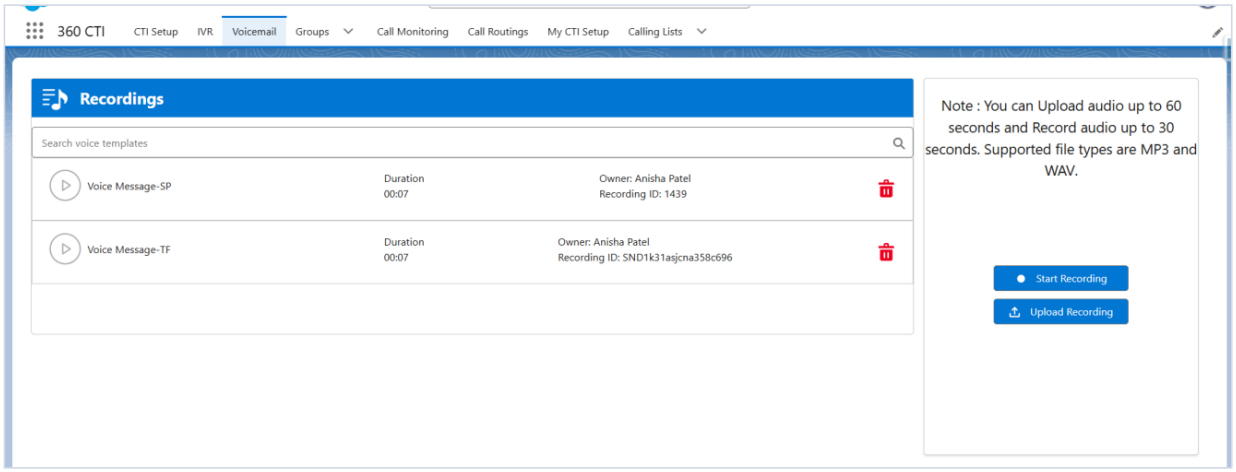


fig. Voicemail Tab

13.3 Which message plays

Where the call is routed	Message used
User Config (missed call routing / out of office)	The User Config voice message or voicemail. Tasks go to the User Config primary user.
IVR entry routed to a **group**	The IVR-level voice message/voicemail, if set.
IVR entry routed to a **user** (with no IVR-level voicemail)	That user's My CTI Setup voice message, or else their voicemail. If neither is set, the call ends.
Call Routing Voicemail step	The recording selected in the step. Tasks go to the Call Routing primary user.
Call Routing Record Owner / Last Communicator Voicemail	That person's My CTI Setup voicemail. The step is skipped if none is set.

> **Note**
>
> When both a voice message and a voicemail are available for the same person, the **voice message** takes priority.

14. Automated Outbound Calls

14.1 Outbound IVR Flow

UPDATED **For:** Admins **Where:** Salesforce Setup › Flows

Use a Salesforce flow to place an automatic call when something happens in Salesforce — for example, when a lead is created or its status changes. Choose an **Operation Type**:

Operation type	What happens
Call	Places the call through the user's softphone.
Voice Message	Plays the selected recording to the customer, then ends the call. Key presses are not stored.
Capture Response (NEW)	Plays the recording and saves the keys the customer presses in the call log's **Key Press** field. Set **Max Input Digits** to capture more than one digit, for example a 10-digit phone number or an ID.
IVR (NEW)	Connects the answered call to an active IVR you select. Everything an IVR can do is available — menus, messages and routing to users, groups, record owners or last communicators.

> **Tip**
> Use **Voice Message** or **Capture Response** for simple announcements and surveys. Use **IVR** when the customer's choice should lead to an agent — for example, "Our Diwali offer is live. Press 1 to speak to our team."

> **Limitation**
> Multi-digit capture (Max Input Digits) is available for **SIP** numbers only. Teleforce numbers capture a single digit.
>
> Outbound IVR Flow calls use your normal calling channels. If all channels are busy, the call is not placed, but a call log is still created.

Screenshot to be added: *Flow action with Operation Type set to Capture Response and Max Input Digits.*

14.2 Voice Broadcast

UPDATED **For:** Admins

Voice Broadcast plays a recorded message to many customers at once. It uses dedicated broadcast numbers and channels, so it does not affect your agents' calling capacity.

- **Number of Concurrent Calls** controls how many broadcast calls run at the same time. It is enabled by 360 CTI Support based on the channels you have purchased. Set it at or below that number.
- **IVR action:** a broadcast can connect answered calls to an IVR that only plays messages — greeting, voice message, voicemail, Send To New IVR, Replay Message , and Back Level. This lets customers explore your offerings and leave responses, and each key press is captured.

- IVRs that route to users or groups do not appear in the broadcast IVR list.
- Voice Message Action: Recorded voice message will play for Customer End and call will disconnect here we are capturing the customer responce in turm of digit.
- Capture Digit: If voice broadcast is running for capture Digit action. Selected voice message will play for the customer after key pressed we will play Post captured Voice message for customer after that call will disconnect.

> **Limitation**
>
> Voice Broadcast cannot route answered calls to agents. With thousands of calls going out, there may not be enough free agents, and callers would be dropped. For calls that should reach an agent, use an Outbound IVR Flow with the IVR operation type.

Additions to 14.1 Outbound IVR Flow

NEW **Source:** Release Notes 1.34

Play a Message and Transfer the Call After a Key Press (Outbound IVR)

In Outbound IVR flows, once a customer presses a key, the system can now play a message before disconnecting — or, after that message, transfer the call to an agent or queue. The message step is optional. This works by having the outbound IVR call a number-based IVR, which plays its greeting and continues the flow from there.

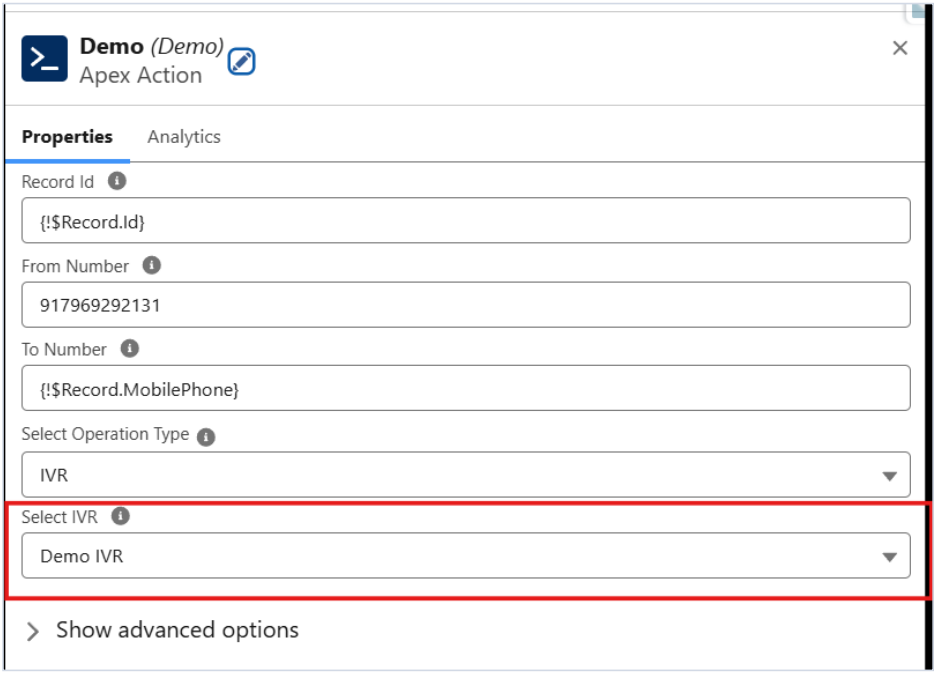


Figure: Outbound IVR Flow action with Select IVR

Outbound IVR Flow Rebuilt on Lightning Web Components

The Outbound IVR flow page has been rebuilt as a Lightning Web Component (LWC) page for better performance and consistency with the rest of the app.

Additions to 14.2 Voice Broadcast

Play a Message Before Disconnecting in Voice Broadcast

In **Voice Broadcast**, when the action type is set to **Capture Digit**, the system now allows you to play a predefined voice message after the customer presses a key and before the call is disconnected.

A new **Post Capture Voice Message** option is available for the Capture Digit action. Users can select the message that should be played after digit capture, providing customers with a clear closing message or next-step information before the call ends.

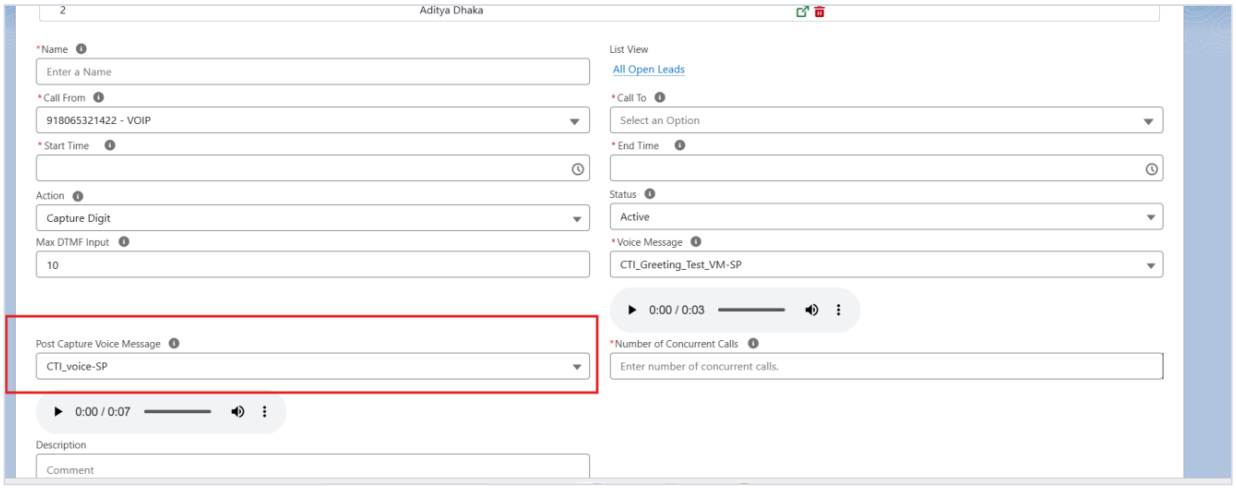


fig. Post Capture Voice Message

15. Call Recordings

15.1 Play recordings

For: Agents, Admins

Calls are recorded according to each number's **Recording** setting (Incoming, Outgoing or Both). Recordings are saved as files in Salesforce and can be played from the related task and call log.

15.2 Control who can download recordings

UPDATED **For:** Admins **Where:** CTI Setup › General Settings › Other Settings › Users With Recording Download Access

Option	Who can download
All (default)	Every user who can see the recording.
None	No one. The download option is hidden.
Users	Only the users you select.
Record Owner (NEW)	The owner of the task or call log (not the owner of the Lead or Contact).
Profile (NEW)	All users with the profiles you select. Use the search box to find profiles quickly.

Users who are not allowed to download can still play recordings they have access to.

Screenshot added ? see page 57.

15.3 Recording file names

NEW **For:** Admins **Where:** Enabled on request

By default, a downloaded recording's file name includes the customer's phone number. For privacy, 360 CTI Support can configure your org so the phone number is left out of downloaded file names.

15.4 When a recording cannot be played

NEW **For:** All users

Clear messages now explain why a recording cannot be played, so you know what to do without raising a ticket:

Message	Meaning and action
Recording not available from the provider	The call connected, but the telephony provider did not supply a recording. No action is possible in Salesforce.
Unable to play the recording. The recording URL is invalid or not configured.	The recording configuration needs updating. Contact 360 CTI Support.

15.5 Salesforce file storage alerts

NEW **For:** Admins

Recordings are stored in your Salesforce **file storage**. When it runs low, the app now warns you on the **CTI Setup** page and in the **softphone**:

- **Yellow** warning – file storage is nearly full (around 80–90%).
- **Red** warning – file storage is full.

> **Important**
> When file storage is full, new recordings cannot be saved as files, and changes to User Config or IVR records may not save. Free up space or buy more file storage from Salesforce as soon as you see the warning.

> **Note**
> The warning is shown by default. 360 CTI Support can hide it on request.

Additions to 15.2 Control who can download recordings

NEW **Source:** Release Notes 1.34

The Call recording download button is visible to everyone by default. Admins can now restrict it using a new **Users With Recording Download Access** field on the General Settings page, choosing exactly which users or profiles and Record Owner should see the download button on Call Recording VF Page.

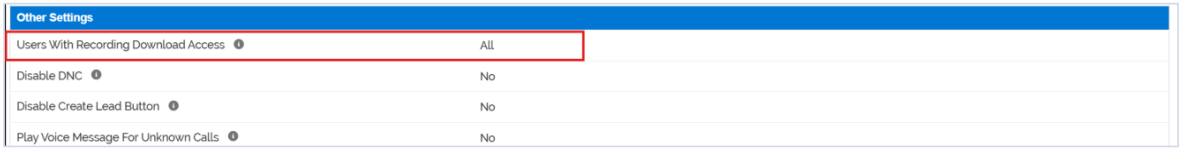


Fig. Users With Recording Download Access

Additions to 15.5 Salesforce file storage alerts

A storage warning is now displayed when Salesforce file storage is running low, helping admins take action before call recordings can no longer be saved. When 90% of the storage is used, a warning message appears on the CTI Softphone Home Tab and CTI Setup page. When the storage reaches 100%, a red banner is displayed to clearly indicate that new call recordings cannot be saved until storage is cleared or increased. Admins can disable these storage warning messages by creating a custom setting named Display_Storage_Message and setting its value to true.

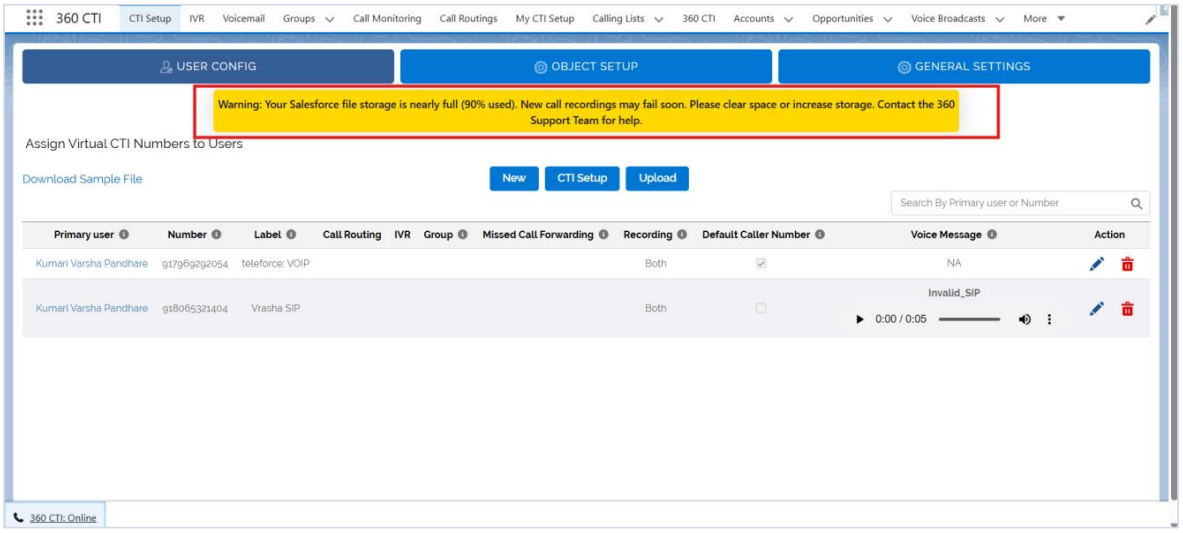


Figure: Storage warning on the CTI Setup page

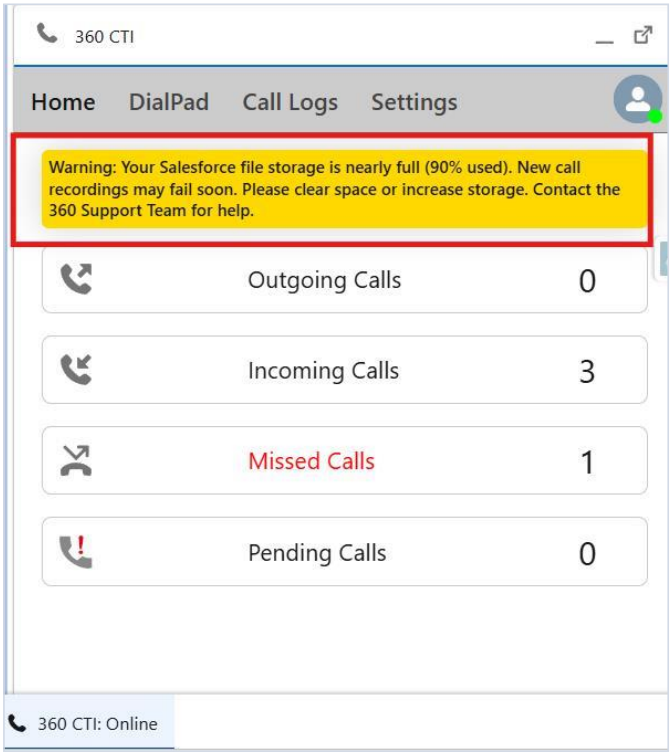


Figure: Storage warning on the CTI Softphone Home tab

16. Call Transcript and AI Insights

UPDATED **For:** Admins, managers

16.1 What it does

After a call, 360 CTI can turn the recording into a written **transcript** and use AI to analyse it: sentiment, a Minutes of Meeting (MOM) summary, topics, action items, scores and more. Results are saved on the call log, so managers can review any conversation in seconds.

> **Example**
>
> Alex, a sales manager, has hour-long client calls covering updates, negotiations and follow-ups. Instead of relying on memory, he opens the call log to read the transcript, sees where the client was excited or concerned, and shares the MOM with his team.

16.2 Set up AI

NEW **Where:** CTI Setup › General Settings › AI Settings

Setting	What it does
AI Provider	**OpenAI** or **Sarvam AI**. Transcripts are generated by the provider you choose.
AI Model	The model to use. A default is filled in for the selected provider; you can type a different supported model.
Transcript Key	Your AI provider's API key. It is stored encrypted, and a message confirms when the key is valid.

> **Important**
>
> You need an account and API key with the AI provider you choose.
>
> After upgrading, click the **CTI Setup** button in User Config once to move your existing key into General Settings.
>
> Check the AI model name carefully. An unsupported model is not rejected on save, but transcripts will fail to generate.

Screenshot added ? see page 61.

16.3 Control when transcripts are generated

NEW

Setting	What it does
Post Call Transcript Mode	**Automatic** (default): every recorded call is transcribed. **Manual**: transcripts are generated only when someone clicks **Sync Transcript** on a call log or uses bulk generation (16.6).

Setting	What it does
Transcript Calls Longer Than	Minimum call length in seconds. Calls shorter than this are not transcribed. Default **0** (all calls). Example: 60 means only calls of 60 seconds or more are transcribed.

> **Tip**
> AI transcription has a cost per call. Short calls ("Hello… not interested") rarely need a transcript. Use a minimum length, or Manual mode, to control spend.

16.4 Language

NEW

Transcript In English Language:

- **No** (default) – the transcript is in the language spoken on the call (for example, Hindi), where the AI model supports it.
- **Yes** – the transcript is always produced in English, whatever language was spoken. Useful when management reviews calls in English.

Summary fields such as MOM and sentiment are produced in English.

16.5 Custom AI instructions

NEW

Tell the AI how to evaluate your calls. Write instructions in plain language in these General Settings fields:

Field	Controls
Call Score Instruction	How the **Call Score** is calculated. Example: "Give 10 points each time the agent explains a product feature; score out of 100."
Call Insight Instruction	What goes into the **Call Insight** field.
MOM Instruction	How the **Minutes of Meeting** summary is written.

Instructions work with both OpenAI and Sarvam AI. You can also define **Call Transcript Keywords** with scores; these feed the Keyword Details and Call Score fields.

16.6 Generate transcripts manually or in bulk

NEW **For:** Admins

For one call

Open the call log and click **Sync Transcript**.

For many calls

1. Create a list view button called **Call Transcript** on the **Call Log** object and add it to the list view layout.
2. Open a Call Log list view. Select specific records (up to 200) or none.

3. Click **Call Transcript**. On the Generate Transcript page, choose the selected records or the **entire list view**, then click **Generate Transcript**.
4. Transcripts and all AI fields are generated using your AI settings and instructions.

> **Tip**
> Only call logs with a recording and a real conversation produce useful transcripts. Filter your list view (for example, to calls without a transcript and above a minimum duration) before generating, to avoid unnecessary AI cost.

> **Limitation**
> The Call Transcript button works on list views, not on reports.

Screenshot to be added: *Generate Transcript page from the Call Log list view.*

16.7 Fields filled in after the call

Field	Contains
Call Transcript	The full conversation. Long transcripts are attached as a file on the call log.
Call Sentiments	Overall sentiment: Positive, Neutral or Negative.
MOM (Minutes of Meeting)	A summary of the call.
Call Insight	Insights based on your Call Insight Instruction.
Topics	The main subjects discussed.
Action Items	Tasks and follow-ups mentioned in the call.
Call Score	Overall score based on your keywords and Call Score Instruction.
Keyword Details	Keywords from your list that were detected.
Talk Time	Based on the customer's idle time; shows whether the call flowed smoothly.
Intent / Sub Intent	The purpose of the call, and whether the concern was addressed.
Engagement Score	How actively the customer took part.
Sentiment Score	The emotional tone of the conversation.
Weighted Score	Call quality, with more weight on key factors such as resolution and satisfaction.

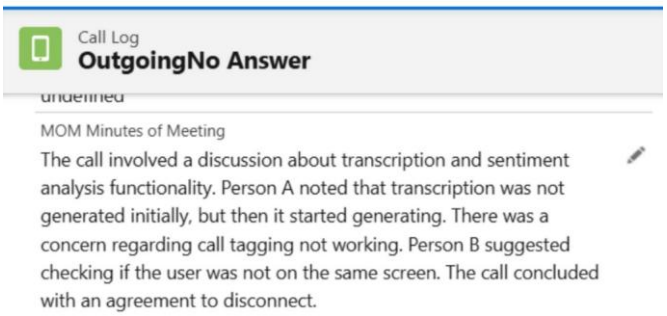


Figure 38: MOM summary on a call log

Additions to 16. Call Transcript and AI Insights

NEW **Source:** Release Notes 1.34

Sarvam AI Integration

The CTI app now integrates with Sarvam AI.

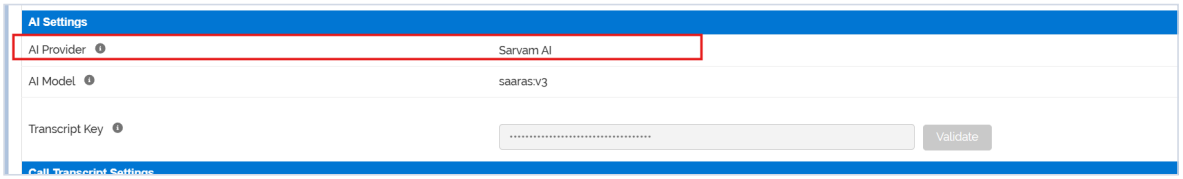


Figure: AI Settings with AI Provider set to Sarvam AI

Set a Minimum Call Length for Transcription

Admins can now set a minimum call length for transcription from the General Settings page using the Transcribe Calls Longer Than field. For example, if the value is set to 30 seconds, only calls longer than 30 seconds will be transcribed, while shorter calls will not be transcribed. If the field is left blank, all incoming and outgoing calls will be transcribed.

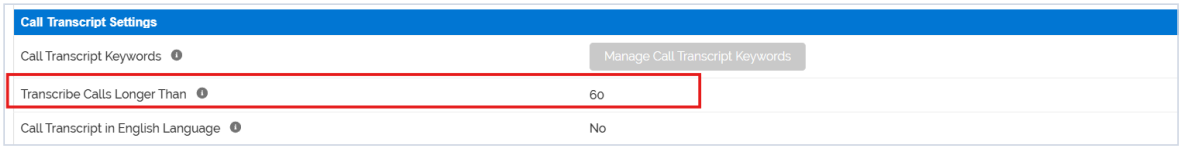


Figure: Transcribe Calls Longer Than

Translate Call Transcripts to English

Post-call transcripts can now be translated into English, even when the call happened in a regional language. A new picklist on the CTI General Settings page lets admins choose the language to translate from, limited to supported languages — note that turning this on increases transcription cost. It's controlled by a field called Call Transcript in English Language on the CTI General Settings page.

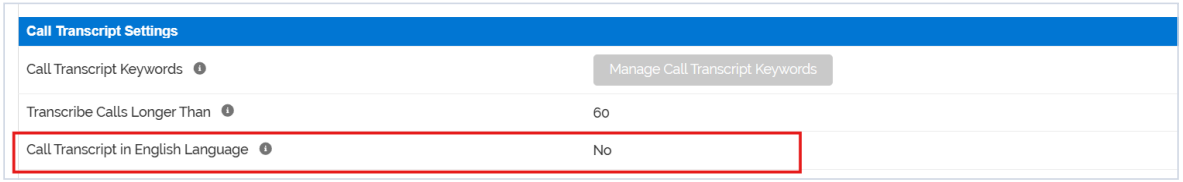


fig. Call Transcript in English Language

Custom AI Instructions for Call Score, Call Insights & MOM

Admins can now define custom AI instructions for Call Score, Call Insights, and MOM (Minutes of Meeting). These instructions allow businesses to tailor how AI analyzes call conversations, evaluates agent performance, summarizes key discussions, and highlights important action items based on their specific business requirements.

Admins can configure separate instructions for each AI-generated field, ensuring the output is relevant, consistent, and aligned with their business needs.

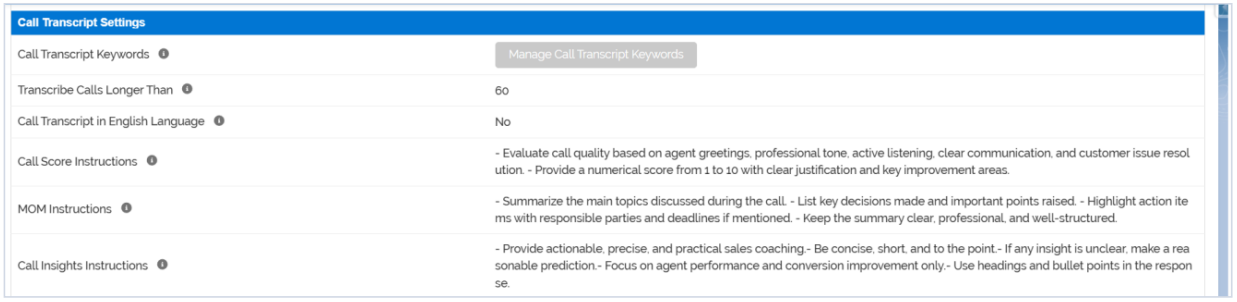


Fig. Call Score, Call Insights & MOM instruction

Bulk Transcribe Call Recordings

Admins can now select multiple call logs and click a button to transcribe them all at once. Requests go to the transcription service in batches of 200 records instead of one at a time. A new field stores the reason a transcript wasn't generated when that happens, and a hidden field tracks whether a transcript is actually ready before the system requests one — so calls that don't need transcribing are skipped instead of resent. This works the same way for both the India and International modules.

17. Call Monitoring

UPDATED **For:** Managers, supervisors **Where:** 360 CTI app › Call Monitoring tab

Call Monitoring lets authorised managers follow live calls between agents and customers, and step in when needed. It turns difficult calls into coaching moments and helps resolve complaints with evidence.

17.1 What you can do

Feature	What it does
Listen	Hear a live call silently. The agent and customer are not aware you are listening (unless agent notification is turned on — see 17.4).
Join	Enter the call to help the agent resolve a complex situation.
Call Whisper	Speak to the agent only; the customer cannot hear you. Ideal for real-time coaching.

The tab has three sections: **Live Calls**, **Waiting Calls** and the **User Status** table, which shows whether each team member is Online, Away, Offline or on a call.

Group column in the User Status table

NEW

The User Status table now has a **Group** column listing every group each user belongs to, with the total number of groups in brackets — for example, "Sales, Support (2)". Click a group name to open that group. Managers can see team membership at a glance.

Screenshot added ? see page 62-A.

> **Note**
> You can monitor one call at a time. Only live calls where the customer and agent are actively talking are shown.

17.2 Who can use Call Monitoring

- The user must have a **CTI number** assigned in CTI Setup and a **360 CTI licence**.
- To see other users' live calls, waiting calls and status, the user needs **monitoring (admin-level) access** — through Call Monitoring Access Settings (17.4) or the role hierarchy.

Clear access messages

NEW

If a user opens Call Monitoring without the right access, a message now explains why:

- **No CTI number** – the user is asked to contact their admin to get a number assigned.
- **CTI number but no monitoring access** – the user is told they do not have admin-level access to view live calls, waiting calls or other users' status.

Additions to 17.1 What you can do

NEW **Source:** Release Notes 1.34

Group Names Now Visible in Call Monitoring

The User Status Details section in Call Monitoring now includes a Groups column, showing the group or groups each user belongs to. The column also displays the total number of groups assigned to the user in parentheses, such as Sales Team (1). This provides a quick and clear view of each agent's group membership directly from the Call Monitoring page.

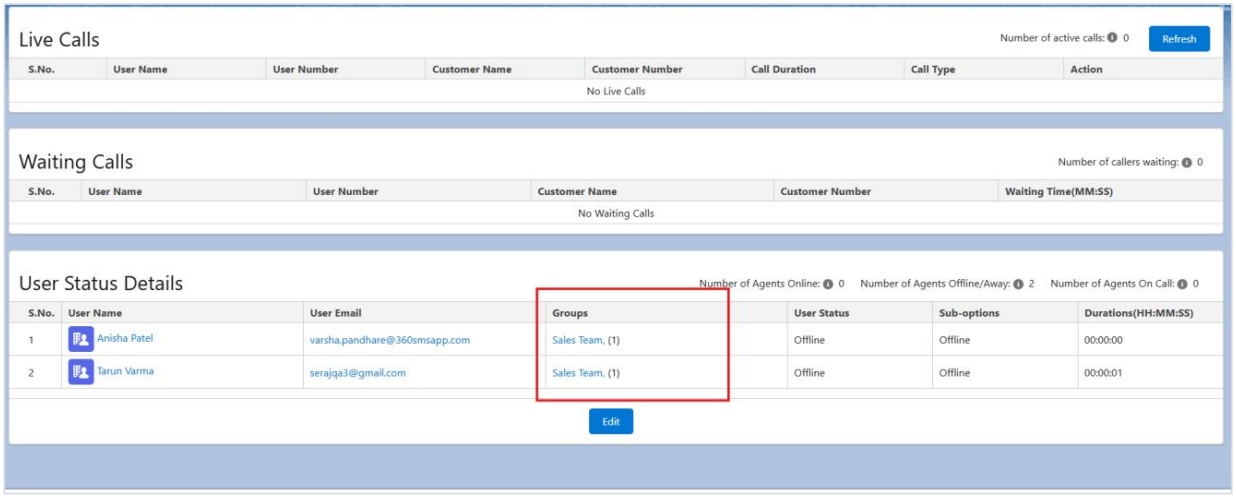


Figure: Groups column in User Status Details

17.3 Call Monitoring in Experience Cloud

NEW

Community (Experience Cloud) users can now use Call Monitoring, with the same features as internal users.

17.4 Access settings

Where: CTI Setup › General Settings › Call Monitoring Access Settings

Setting	What it does
Provide Additional Access To Users	Set to Yes to override the app's default monitoring access.
Follow Role Hierarchy	Set to Yes to give managers access based on the role hierarchy.
Grant Admin Access To Users	User IDs (comma-separated) that get admin-level monitoring access.
Grant Admin Access To Profiles	Profile IDs (comma-separated) that get admin-level monitoring access.
Notify Agent When The Manager Listens To The Call	Set to Yes to tell agents when a manager is listening. (Other Settings)

18. Reporting on Calls

NEW **For:** Admins, managers **Where:** Call Log object

New fields on the **Call Log** record make it easy to report on how calls are made and where they go, and to troubleshoot issues. Add them to your call log page layout and reports.

Field	What it contains	Example use
Call Source	How the call was made or received: Click to Dial, Softphone (DialPad or call logs), Power Dial, Calling List, Call Routing, Voice Broadcast, Flow, Salesforce mobile app,IVR, and so on.	Which calling feature does your team use most?
Call Source ID	The ID of the item behind the call, for example the Calling List, Call Routing or Voice Broadcast.	Compare results between two Calling Lists.
Call Destination	The name of the **last group** the incoming call rang (from User Config, IVR or Call Routing), whether answered or missed.	Build a flow that shares missed calls from a group among its members.
Key Press	Keys pressed by the customer (from Play Recording transfers and Outbound IVR Capture Response).	Report on feedback ratings or survey answers.

> **Limitation**
> Call Destination stores only the last group the call rang, even if the call passed through several groups.

Additions to 18. Reporting on Calls

NEW **Source:** Release Notes 1.34

Call Source Fields Combined Into One

The Call_Source__c and Call_Source_Id__c Call log fields from the CTI International Package have been merged into one field, now working consistently across all providers.

New Field: Call Destination on Call Log

A new Call_Destination__c field on the Call Log stores the name of the queue where a call last landed, whether it ended as a missed call, a voicemail, or an answered call. This works across the entire app.

19. Admin How-To Guides

19.1 Assign a CTI number to a user

For: Admins **Where:** CTI Setup › User Config

1. Go to **CTI Setup** and open **User Config**.
2. Click **New**.
3. In the **User Information** window, select the **Number** and fill in the **Incoming Routing** details (primary user, group and so on).
4. Click **Save**. The number now appears in the User Config list.

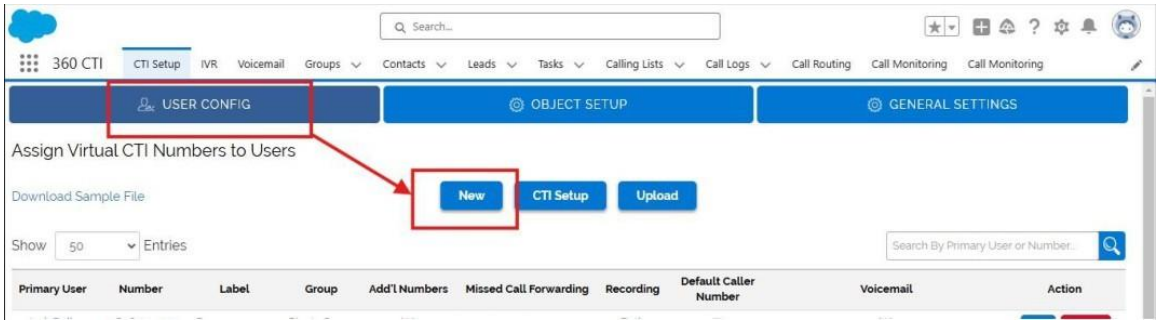


Figure 39: User Config with the New button

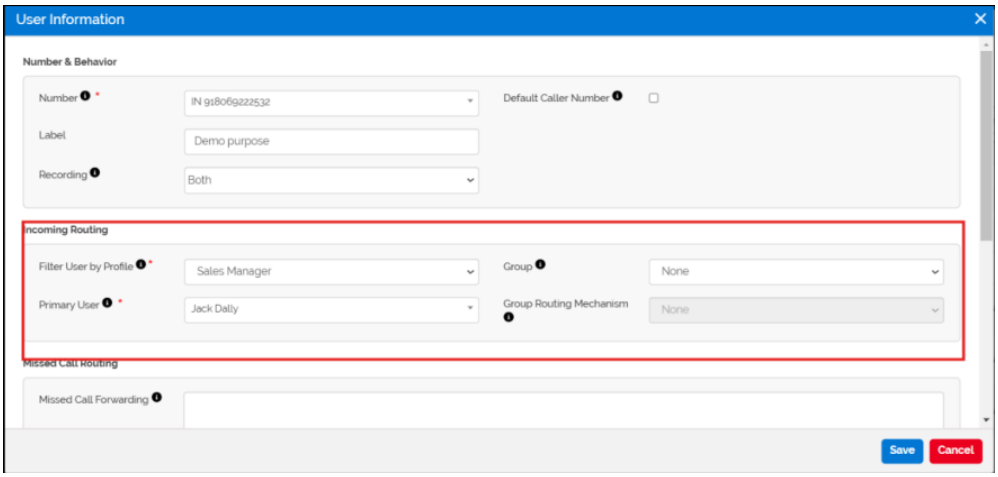


Figure 40: User Information window

> **Note**
> Make sure the user's mobile number is correct in My CTI Setup; their calling agent is created from that number.

19.2 Set a default outgoing number

When a user has several CTI numbers, choose which one is used for outgoing calls by default.

1. Go to **CTI Setup › User Config**.
2. Click **Edit** next to the number.
3. In **User Information**, select **Default Caller Number**.
4. Click **Update**.

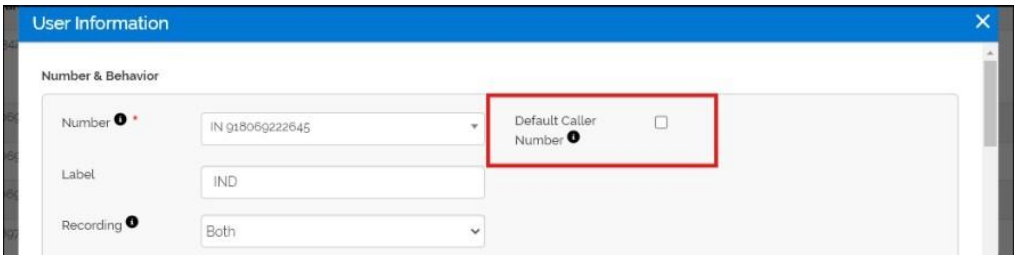


Figure 41: Default Caller Number checkbox

> **Note**
> Default Caller Number does not apply when Sticky Caller is used; the sticky number takes over.

19.3 Label numbers

In **CTI Setup › User Config › Edit**, enter a **Label** (for example, "Sales" or "Support") so users can tell their numbers apart. The label also appears on the incoming call screen.

19.4 Create groups and manage members

UPDATED **For:** Admins

Create a group

1. Click on the Group Tab in CTI Application .
2. Click **Groups**, then **New**.
3. Enter the group details and click **Save**.

Figure 43: Ne Group form

Add or remove members

1. Open the group and click **Edit**.
2. To add a user, search and select them in the list.
3. To remove a user, search deselect them.
4. Click **Save**.

Figure 44: Adding a member to a group

> **Tip**
> User and group picklists across the app are now searchable. The first 50 entries are shown; type a name to find anyone else. Pages also load faster in large orgs.

19.5 Add the Click to Dial component to a page

UPDATED **For:** Admins

1. Open a record page and click the **Setup (gear)** icon, then **Edit Page**.
2. Search for **ClickToDial** under **Components**.
3. Drag the component to where you want it on the page.
4. Click **Save** (and activate the page if prompted).

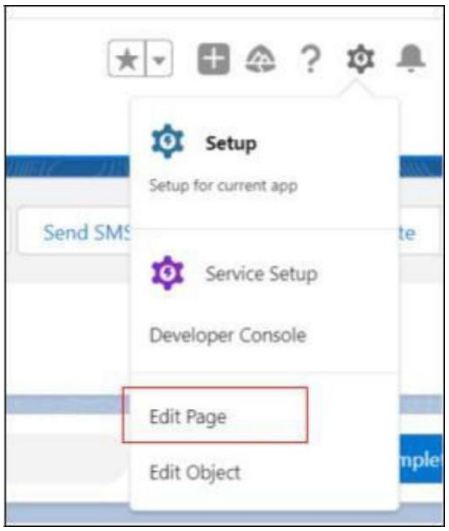


Figure 45: Edit Page from the Setup menu

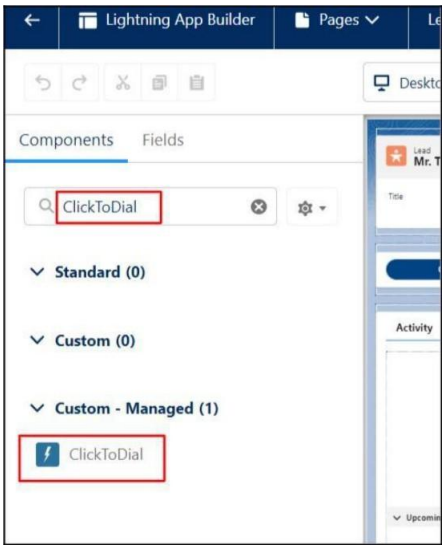


Figure 46: Finding the ClickToDial component

Choose which phone fields appear in the component in **CTI Setup › Object Setup › Click To Dial Fields**. Phone and Formula (Text/Number) fields are supported and shown in a two-column layout.

New: The component now shows a loading message until the softphone is ready, then makes the numbers clickable (see 5.1).

19.6 Add the Power Dial button to a page layout

1. Click the **Setup (gear)** icon and open **Object Manager**.
2. Select the object (for example, Contact) and click **Page Layouts**.
3. Open the layout you want to change.
4. Click **Mobile & Lightning Actions**, search for **PowerDial** and drag it into the **Salesforce Mobile and Lightning Experience Actions** section.
5. Click **Save**.

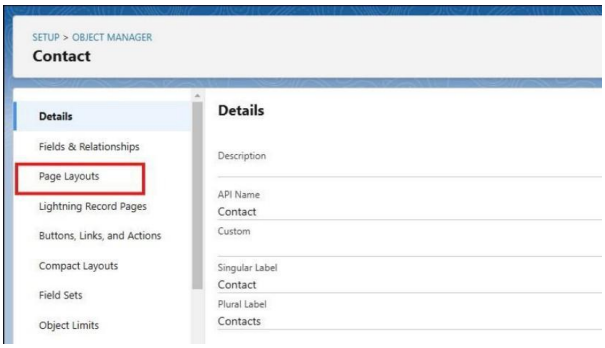


Figure 47: Page Layouts in Object Manager

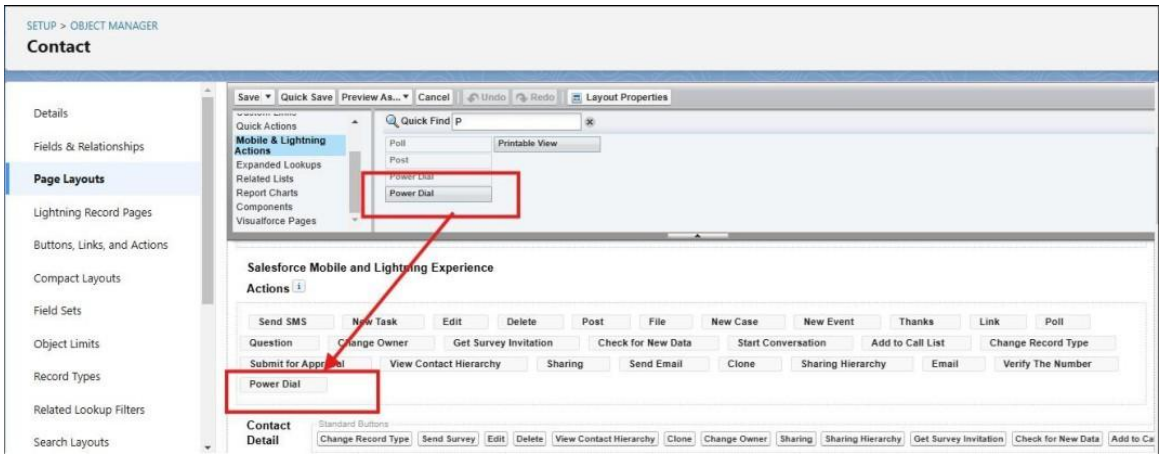


Figure 48: Adding the Power Dial action

19.7 Change the softphone navigation bar

1. Go to **CTI Setup › General Settings** and click **Edit**.
2. Scroll to **Softphone Settings**.
3. In **Softphone Navigation Menu**, choose and order the tabs (up to five).
4. Click **Save**.

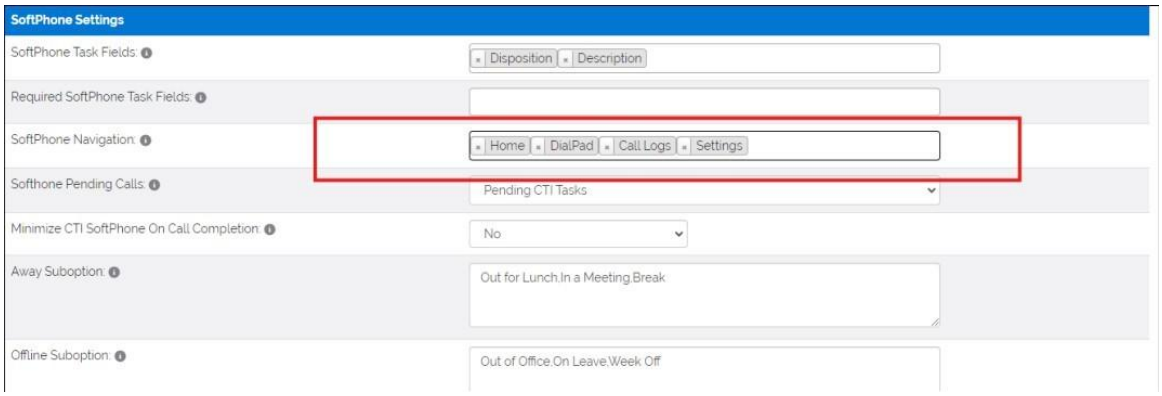


Figure 49: Softphone navigation settings

19.8 Enable number masking

Masking hides part of a customer's phone number from agents, for example ******1234, to protect privacy.

1. Go to **CTI Setup › General Settings** and click **Edit**.
2. Select **Enable Masking**.

3. Set **Masking Type**: **Front** or **Rear**, which decides whether the visible digits are at the start or the end of the number.
4. Set **Masking Level**: how many digits stay visible (maximum 4).
5. Click **Save**.

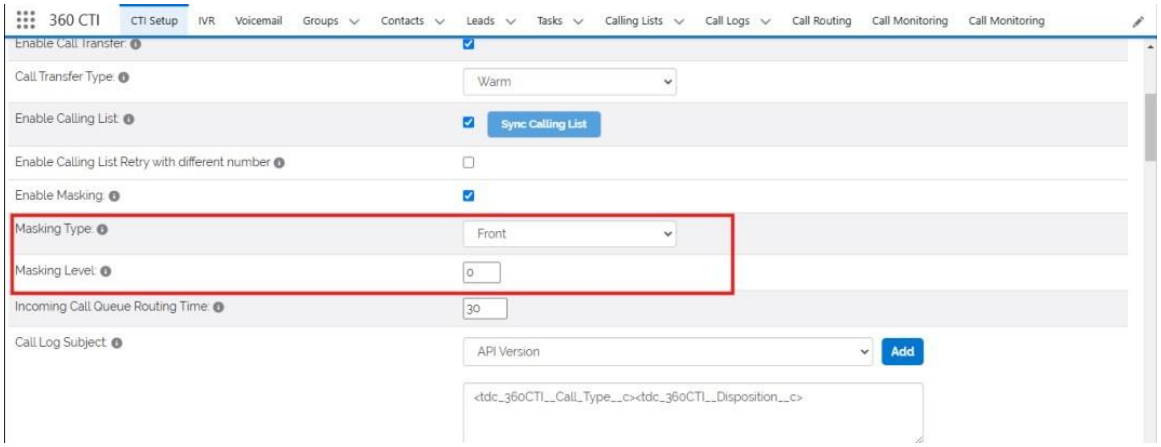


Figure 50: Masking Type and Masking Level

19.9 Open a screen flow from the softphone

UPDATED **For:** Admins **Where:** CTI Setup › General Settings › Softphone Screen Flow Settings

Open a Salesforce screen flow inside the softphone at a chosen moment in the call, so agents can capture extra details without leaving the call screen.

Setting	What it does
Open Screen Flow	Set to Yes to turn the feature on.
Flow Name	The API name of the screen flow.
Flow Param (UPDATED)	The flow's input variable names, **separated by commas**.We support Two Variable, RecordID which how call customer record id (Ex, Lead, Account, contact), and CalliD (which hold the currect call ID)
Open Screen Flow At	The call event that opens the flow, for example when the call is answered by the agent or customer, or when the call ends.

- **New:** The app passes both the **Record ID** and the **Call ID** (the current call log). With the Call ID, your flow can update exactly the right call log, even when a record has many.
- **New:** Screen flows now also open in the **Salesforce mobile app**, with no extra set-up.

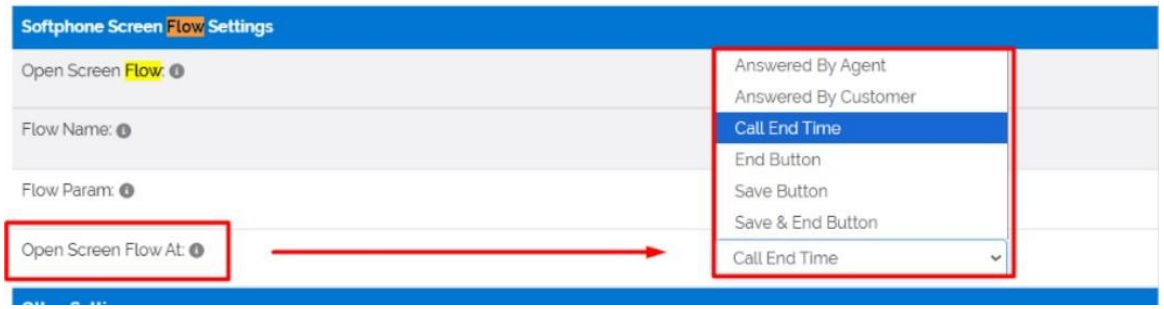


Figure 51: Screen flow settings

Additions to 19.9 Open a screen flow from the softphone

NEW **Source:** Release Notes 1.34

Screen Flow Popup in SF1 Mobile App

Screen Flow popup functionality has been implemented in the Salesforce mobile (SF1) app.

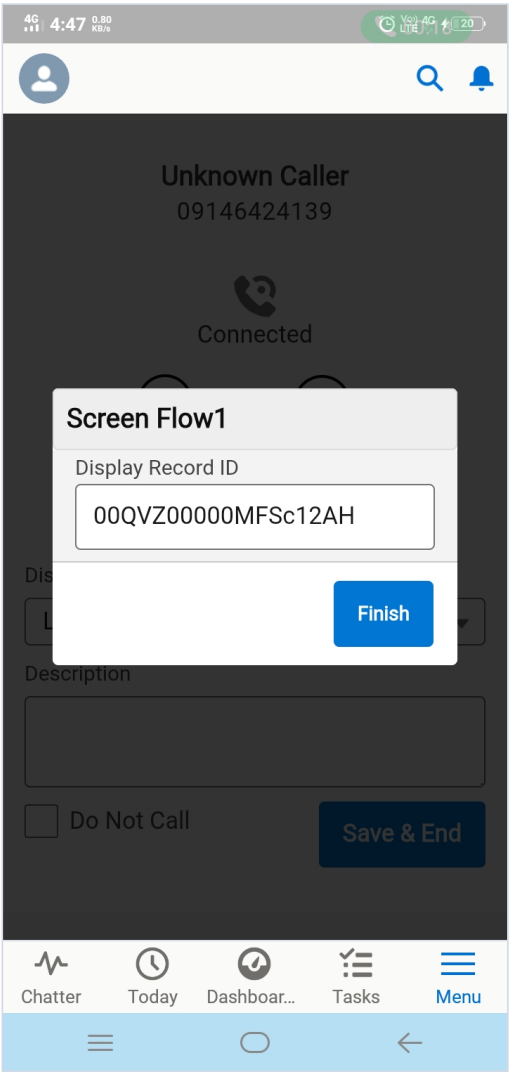


Figure: Screen Flow pop-up in the SF1 mobile app

Pass Call ID to Screen Flow Pop-Ups

Screen Flow pop-ups triggered by softphone events (like Call Answered or Call Ended) used to receive only one value, recordId. They can now also receive callId. Admins set this up on the General Settings page by listing the Flow variable names they want, comma-separated — for example, recordId,callId — with no hardcoded variable names needed.

20. CTI Setup Reference

The **CTI Setup** tab has three sub-tabs: **User Config**, **Object Setup** and **General Settings**. Throughout the setup pages, user and group picklists are searchable: the first 50 entries are listed and you can type to find the rest.

20.1 User Config

Assign numbers to users and set how each number behaves. Two buttons are available:

- **New** – assign a number to a user, or update a number's settings.
- **CTI Setup** – sync configuration changes with the provider (also used once after upgrading to move the AI transcript key).

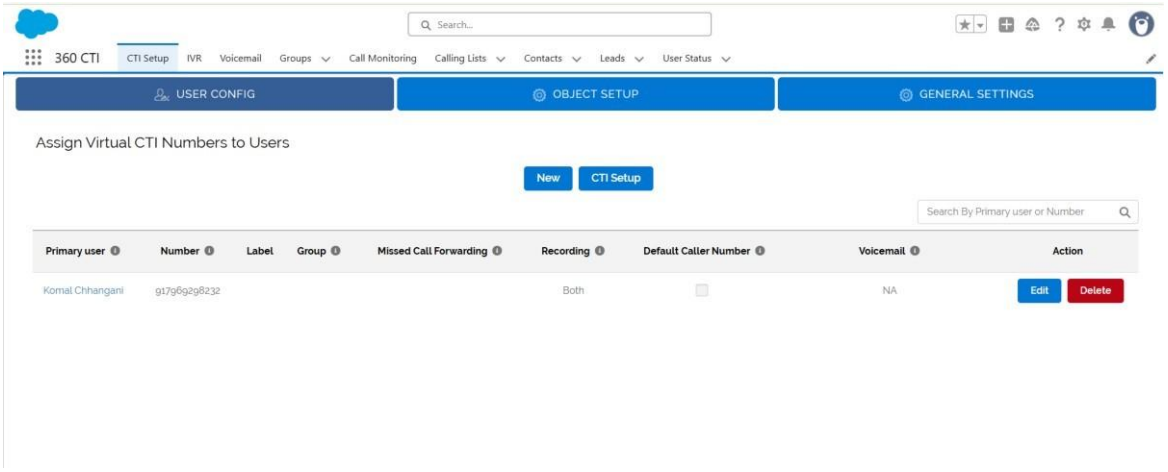


Figure 52: User Config tab

Section / field	What it does
Number & Behaviour	
Number	The number assigned to the user.
Default Caller Number	Makes this the user's default outgoing number. Not used when Sticky Caller is defined.
Label	A name for the number.
Recording	Record Incoming only, Outgoing only, or Both.
Country	The number's country.
Incoming Routing	
Filter User By Profile	Limits the user picklist to one profile.
Primary User	The user the number belongs to. If a group is used, the primary user must be in it.
Group / Group Routing Mechanism	Share calls among a group (see 10.2).
Missed Call Routing	
Missed Call Forwarding	Up to two numbers, comma-separated.
Voice Message / Voicemail (UPDATED)	Play a message, or let the caller leave a voicemail (see 10.1).
Out of Office	

Section / field	What it does
Out of Office fields	See 10.1.
Other Settings	
SF1 Notification	Sends push notifications to the Salesforce mobile app for incoming calls.
Call Direction (UPDATED)	Incoming, Outgoing, Both, or **Missed Call Number** (see 10.6).
Auto Save Disposition	Seconds after which the call and disposition are saved automatically if not saved manually; the next call then starts.
Select Voice Message For Disallowed Record	Message for incoming calls that are not allowed.
Select Voice Message For Call Waiting	Message played while the caller waits; your own voice or a robotic male/female voice.

20.2 Object Setup

Field	What it does
Object Name	The object to configure (for example, Lead or Contact).
Priority	Decides which object is matched first when the same number exists in more than one object.
Incoming Call Fields	Up to five fields shown on the incoming call screen, in a single column.
Click To Dial Fields	Phone and Formula (Text/Number) fields shown in the Click to Dial component, in two columns.
Default PowerDial Fields	The phone field Power Dial calls.
Default SF1 Calling Fields	Fields the Salesforce mobile "Call" button dials directly, skipping the dialer screen. Not recommended if you call several phone fields.

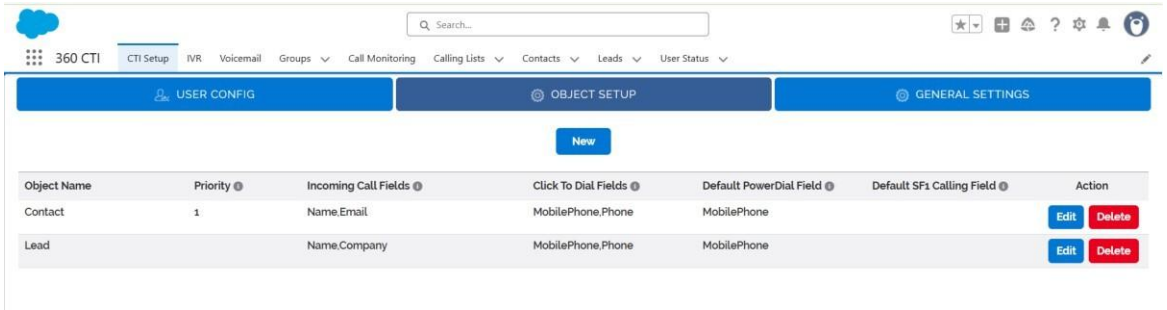


Figure 53: Object Setup tab

20.3 General Settings

All app-wide settings. Click **Edit** to change them and **Save** when done.

Setting	What it does
Call Settings	

Setting	What it does
Site URL	The site URL used for outgoing calls.
CTI App Owner	The owner of the app.
Enable Call Conference	Allows conference calls during incoming and outgoing calls.
Enable Call Transfer / Call Transfer Type	Turns on call transfer; Warm or Cold (see 7.1).
Enable Calling List / Retry With Different Number / Auto Resume	Calling List options (see 9.2).
Enable Sticky Agent As Owner / Disable Last Communicator / Enable Last Communicator As Owner	Ownership options, one at a time (see 10.3).
Enable Masking / Masking Type / Masking Level	Hide part of customer numbers (see 19.8).
Open Customer Record In	Open the caller's record in a new tab or in the background on incoming calls.
Call Log Subject	The format of call log subjects.
Unknown Call Settings	
Link Unknown Call	Create records for unknown numbers (see 6.5).
Missed Call Settings	
Missed Call Notification	Email notifications for missed calls.
Send Missed Call Notification	Main User, or Main User + All Group Users.
Auto Remove Missed Call On Callback (NEW)	Clear missed calls from the softphone after a connected callback (see 6.6). Default Off.
Softphone Settings	
Softphone Pending Calls	Pending CTI Tasks or Pending Scheduled Calls (see 5.6).
Minimize CTI Softphone On Call Completion	Minimise the softphone after each call.
Display Related Records	Which record opens when a call log is clicked in the softphone.
Away Suboption / Offline Suboption	Reasons for Away and Offline, comma-separated.
Softphone Task Fields / Manage Profile Wise Setting	Fields and dispositions on the softphone (see 8.1).
Softphone Dashboard Settings	
Outgoing / Incoming / Missed / Pending Calls History View	List views used for each section of the softphone Home tab.
Sync Button	Refreshes the softphone call history sections.
Fields For View All Page	Up to 15 fields on the softphone View All page, in the order selected.
Call Monitoring Access Settings	
Access settings	See 17.4.
Softphone Screen Flow Settings	

Setting	What it does
Open Screen Flow / Flow Name / Flow Param / Open Screen Flow At	See 19.9.
AI and Call Transcript Settings (NEW)	
AI Provider / AI Model / Transcript Key	See 16.2.
Post Call Transcript Mode / Transcript Calls Longer Than	See 16.3.
Transcript In English Language	See 16.4.
Call Score / Call Insight / MOM Instruction	See 16.5.
Other Settings	
Disable DNC	Hide the Do Not Call checkbox on the softphone.
Disable Create Lead Button	Hide the Create Lead button for unknown incoming calls.
Play Voice Message For Unknown Calls	Play a message to all unknown callers (message set in User Config).
Skip Lead Criteria	A SOQL WHERE clause for Lead records to skip when matching unknown incoming calls.
Disable All Webhooks	Stop all call-related webhooks from the provider.
Dialplan Id / Recording Ids	Provider technical settings.
Blacklisted Numbers	Numbers to block (see 10.7).
Call Transcript Keywords	Keywords and scores used for Call Score (see 16.5).
Notify Agent When The Manager Listens To The Call	See 17.4.
Users With Recording Download Access (UPDATED)	All, None, Users, Record Owner or Profile (see 15.2).

21. Troubleshooting and FAQs

Question or problem	Answer
I clicked a number in Click to Dial and nothing happened.	The softphone was still loading. Wait until the loading message disappears and the numbers become clickable, then click once.
The incoming pop-up appears on every Salesforce tab (VoIP).	This is the provider's default. To ring on a single tab, ask 360 CTI Support to request it from the provider.
I marked myself Offline during Power Dial and now cannot call.	Change your status back to **Online**; outgoing calls need Online status.
My sticky agent did not ring.	Sticky agents are skipped when they are not Online, have no access to the number, or have no licence. Sticky Agent works for incoming calls only.
A missed call did not disappear after I called back.	Check that Auto Remove Missed Call On Callback is on, the call connected, and you called the **same number** that called you.
A voicemail drop was created but there is no message.	The caller hung up after the beep without speaking. This still counts as a voicemail drop. Hanging up before the beep creates a missed call task instead.
The # key does not work in my IVR.	The # key is not supported because of a provider limitation. Use 0–9 or *.
Callers hear a normal ringtone while we route them.	The ringback tone is controlled by the provider. Add a Voice Message as the first Call Routing step to greet callers.
A recording says it is not available from the provider.	The provider did not supply a recording for that call. Contact 360 CTI Support if this happens often.
A recording says the URL is invalid or not configured.	Contact 360 CTI Support to update the recording configuration.
New recordings are missing, or User Config/IVR changes will not save.	Check for the file storage warning. Free up Salesforce file storage or buy more.
A call has no transcript.	Check: transcript mode (Manual needs Sync Transcript); the call is longer than the minimum length; the call has a recording; the AI key is valid and the AI model name is correct.
I cannot see live calls in Call Monitoring.	You need a CTI number and monitoring access. The message on screen tells you which is missing.
The Manage Disposition table shows a warning.	Turn on Lightning Web Security in Setup › Session Settings.
An agent stopped receiving calls.	Check their mobile number in My CTI Setup. If it was removed, their agent was deleted; add the number back.

22. Known Limitations

- Sticky Agent routing applies to incoming calls only.
- IVR entries support 0–9 and *; the # key is not supported.
- The key pressed after a Play Recording transfer is stored but cannot route the call further.
- Multi-digit capture in Outbound IVR Flows is available for SIP numbers only; Teleforce numbers capture one digit.
- Voice Broadcast cannot route answered calls to agents, and only message-type IVRs can be used with it.
- Call Destination stores only the last group the call rang.
- The bulk Call Transcript button works on list views, not reports.
- A Call Routing Voice Message & Voicemail step plays a message or takes a voicemail, not both. Capture Digit is available on the Voice Message type only.
- Personal (My CTI Setup) voice messages and voicemail do not apply to calls routed by User Config.
- Community users cannot create Calling Lists.
- The ringback tone callers hear while being routed is controlled by the provider.
- Only one call can be monitored at a time.

23. Contact Us

For help, feature requests or to enable options marked "Enabled on request", contact the 360 CTI Support team:

Email: care@360smsapp.com

Phone: +91 806 902 7849

Website: 360smsapp.com/computer-telephony-integration