360 CTI INDIA APP

Scheduling Calls Mechanism



360 DEGREE CLOUD TECHNOLOGIES PVT. LTD.

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Scheduled Calls

A Scheduled Call is a feature in 360 CTI that allows users to plan and set up calls for a specific date and time in advance.

Note-

- To enable the call scheduling feature, you must check the "Enable calling" checkbox in the general settings.

- By default, we only pick scheduled calls from the last 60 minutes, which means the scheduled date and time must be within the last 60 minutes. However, this duration can be extended by the 360 support team.

Use Case- A scheduled call is used when a customer is called, and they say they are not currently available but provide a specific time when they can be called. In such cases, we use the scheduled call feature.

Required Fields for Scheduled Calls

- The 'Assigned To' field must be filled.
- 'Scheduled Date and Time' should be filled.
- 'Call From' and 'Call To' fields are required and must be filled.
- Link objects are mandatory, There should be one linked object for processing a valid schedule record.

  Note- You can link the scheduled calls to only one object.

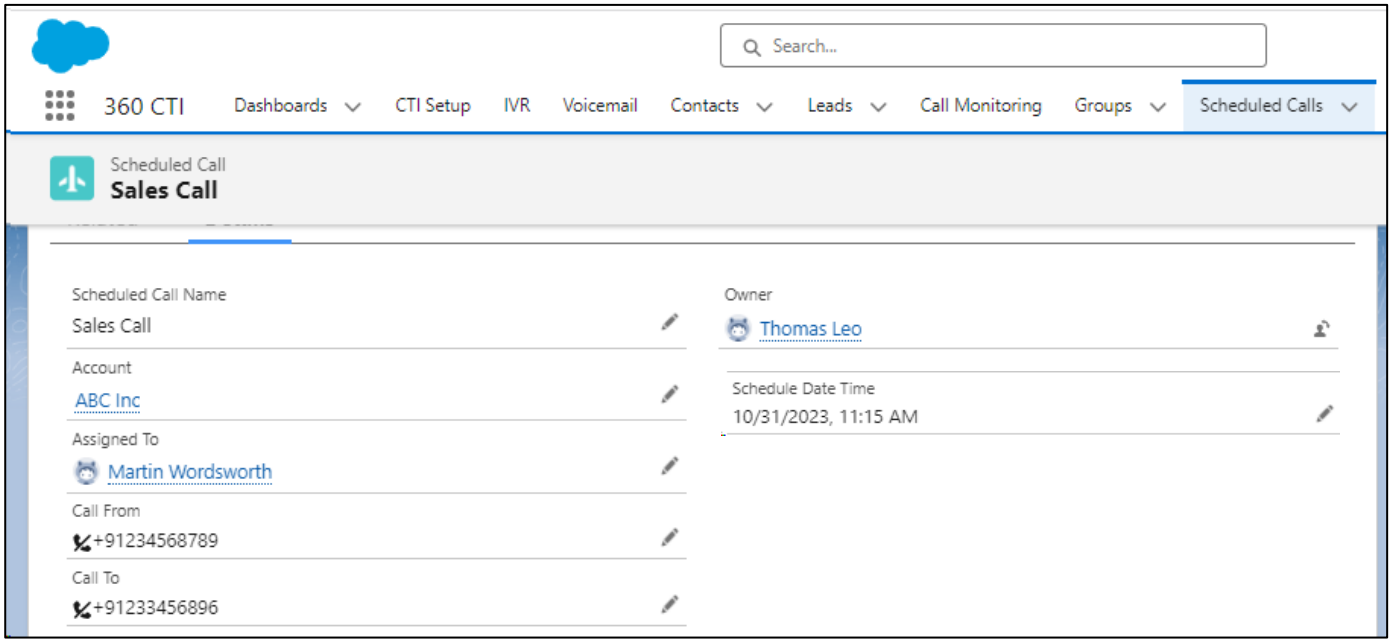


Fig: 1 Scheduled Calls Required Fields

How Scheduled Calls works

When User on call:

During a call, if a scheduled call is set for 5:10 minutes, and the user is busy with another call at that exact time, the scheduled call will be paused until the user's current call is completed. Once the current call is finished, the scheduled call will be initiated for the user 5 minutes later.

When Agent missed the call:

If a scheduled call is initiated, and the agent misses the call, a call log will be created with the name 'Outgoing Missed by Agent.' This signifies that the agent either declined the call or didn't answer it. In this case, the scheduled call feature will continue to attempt initiation every 5 minutes until the agent picks up the call.

For example, if the scheduled call is initiated 5 times, and the agent doesn't pick up the call each time, the scheduled call will stop after 5 attempts. This is customizable, and the client will need to contact our support team to make the necessary adjustments.

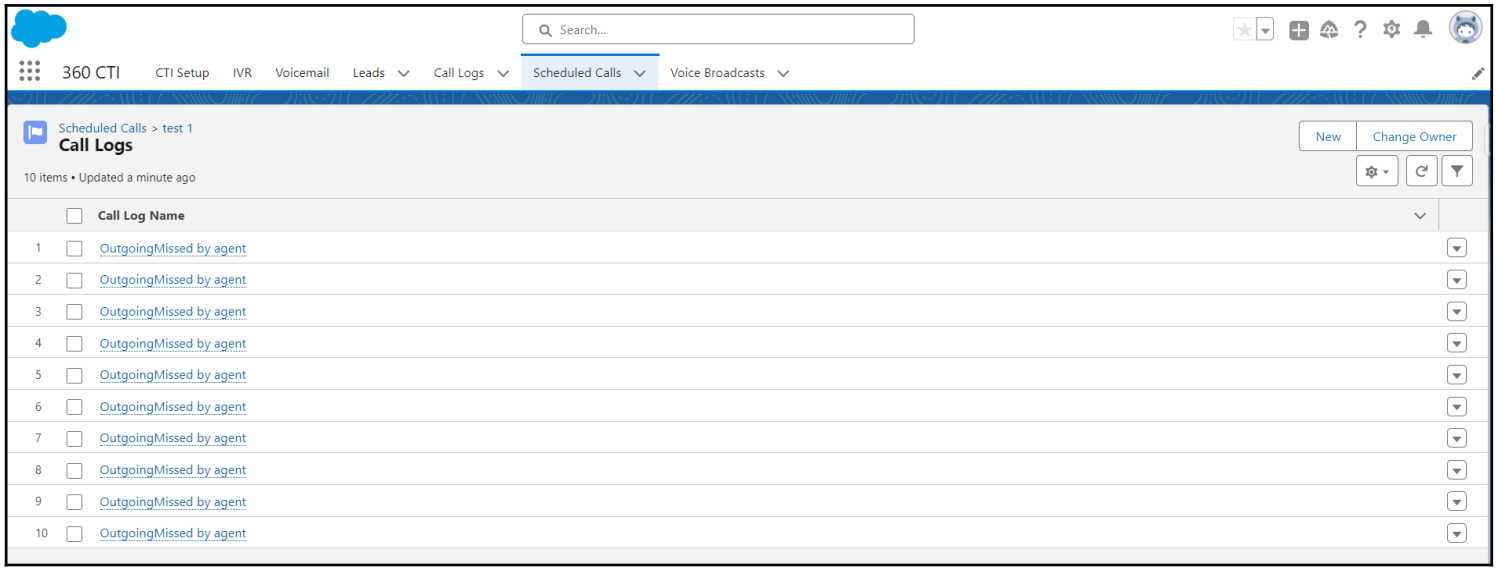


Fig: 2 "Outgoing Missed by agent" Call log created

Scheduling Calls Through Flows Basics

Salesforce Flows provide a code-free approach for effectively managing the triggering of Outbound Calls and handling Incoming Calls based on Keywords or other criteria. It offers the flexibility to trigger actions on any object within the Salesforce platform.

Lead/Contact: These are commonly used scenarios where Outbound Calls are triggered when leads/Contact are created or when specific fields undergo changes.

Custom Objects: Similar to Lead/Contact cases, 360 CTI supports triggered calls from any custom object.

Call Logs: It is used to see records or entries that capture important information about phone calls made or received through the integrated telephony system. These logs provide a detailed history of call activities and can be used for various purposes, such as tracking communication, analyzing call metrics, or facilitating customer service.

To trigger a call, you only need to configure a few straightforward settings:

For immediate action, set "Create a Record" to "Scheduled Call" and then specific the following parameters either through Flow:

To Create the Flow follow the below steps:

Go to Setup>> Search for “Flows” on Quick Action>> Click on “New Flow” >> Choose the Flow Type>> And here you go, you can create the flow now as per the requirement

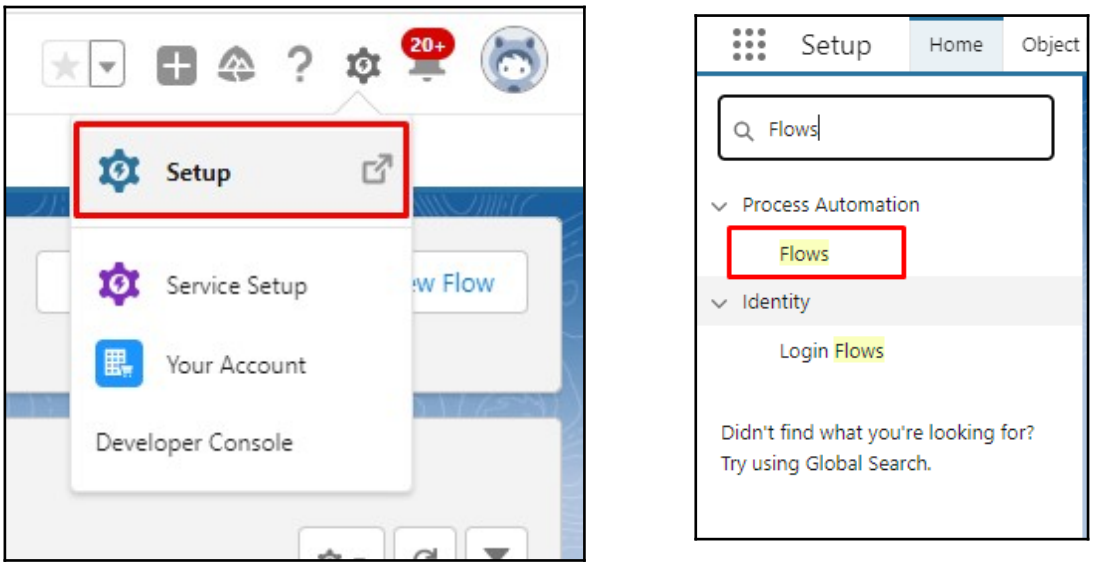


Fig: 3 Setup Option and Flow in Quick search

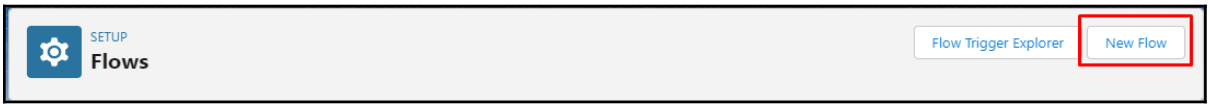


Fig: 4 New Flow Button

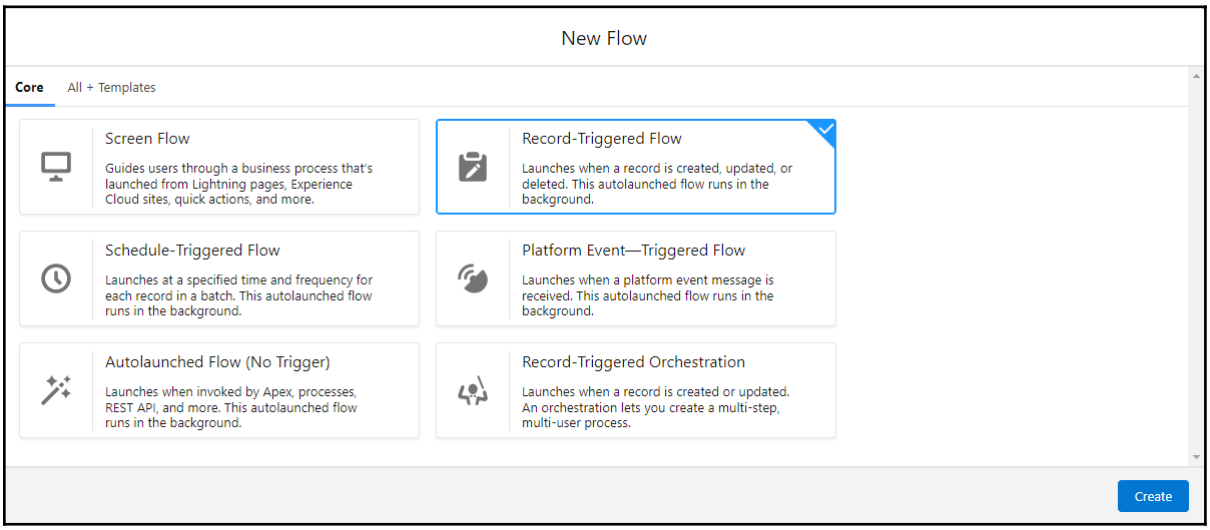


Fig: 5 Flow type

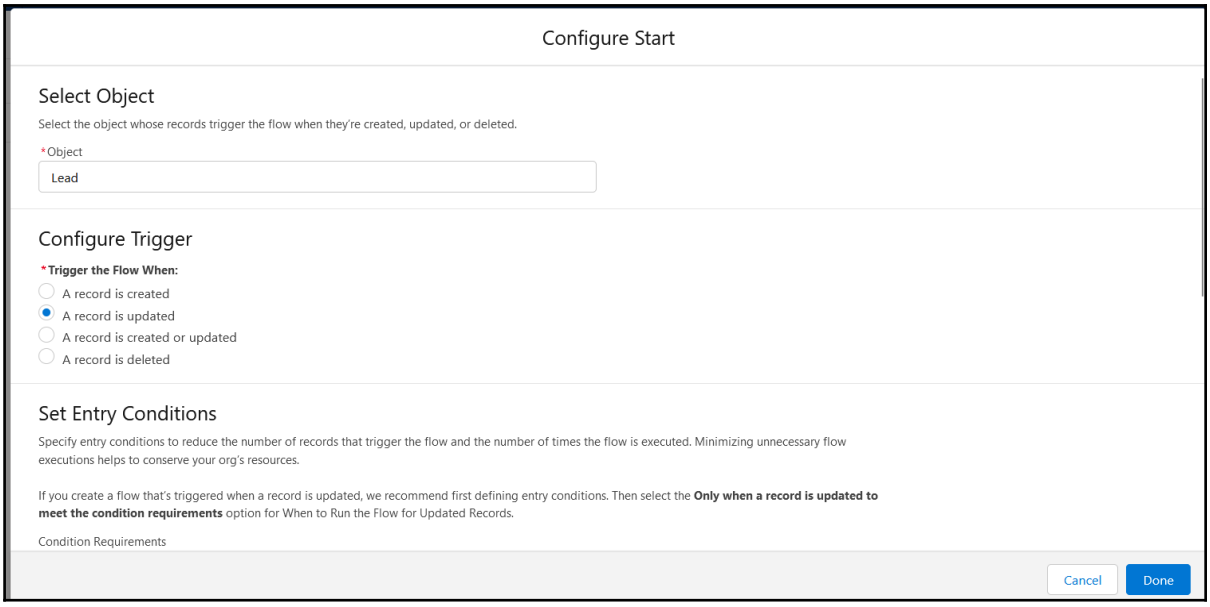


Fig: 6 Configure a flow

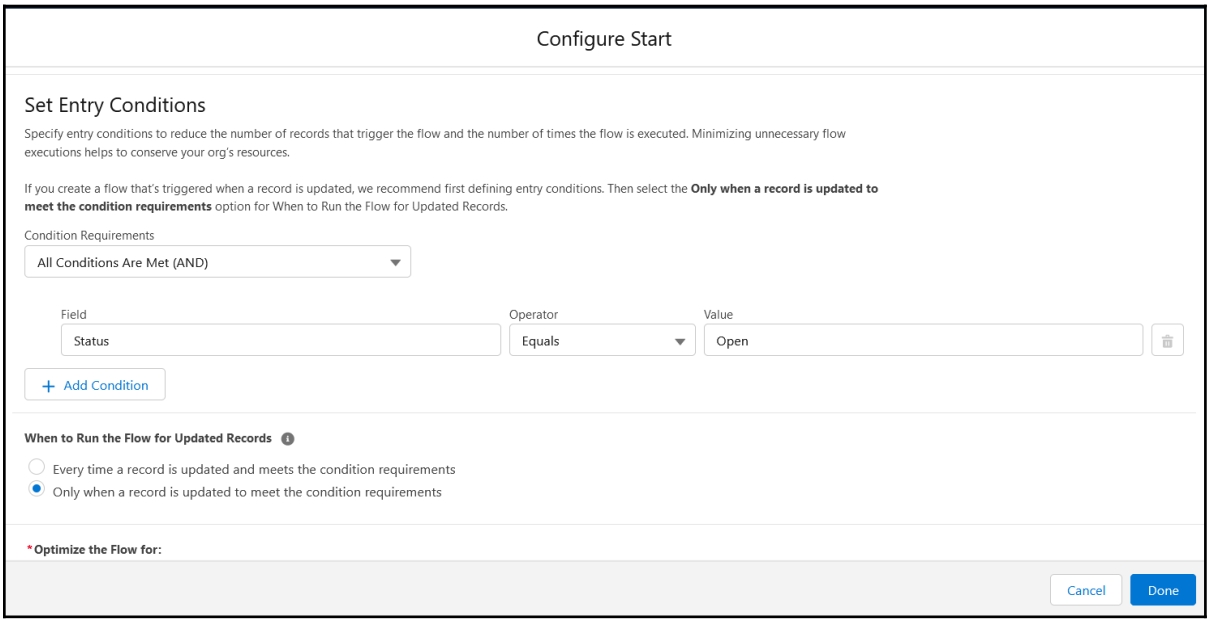


Fig: 7 Set entry conditions

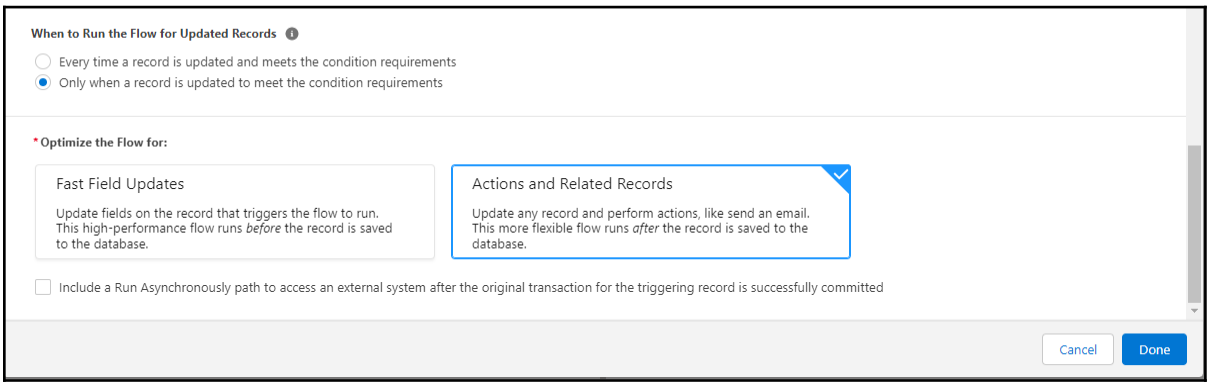


Fig 8: other setup for initial step in flow

Creating Variable

Go to Flow Builder and click on New Resource > Select Formula as Resource Type > Write API Name as Schedule Call or as per your preference

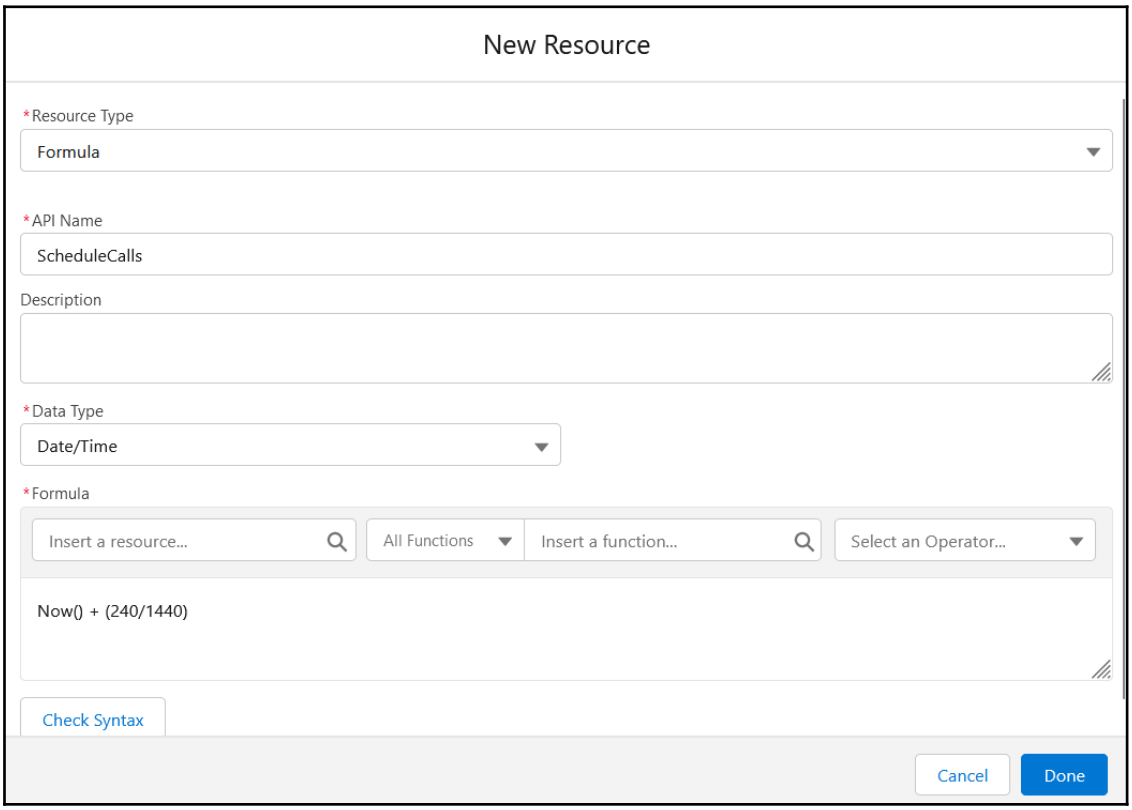


Fig 9: New Resource Creation

To schedule the call at different times, you need to enter distinct formulas for each desired time,

For Instance:

- **Now() + 1** - When this formula is applied, the call is scheduled exactly after 24 hours.
- **Now() + (60/1440)** - When this formula is applied, the call is scheduled after an hour.
- **Now() + (240/1440)** - When this formula is applied, the call is scheduled after four hours.

You can modify the time or date of making call in the similar pattern as the examples given above.

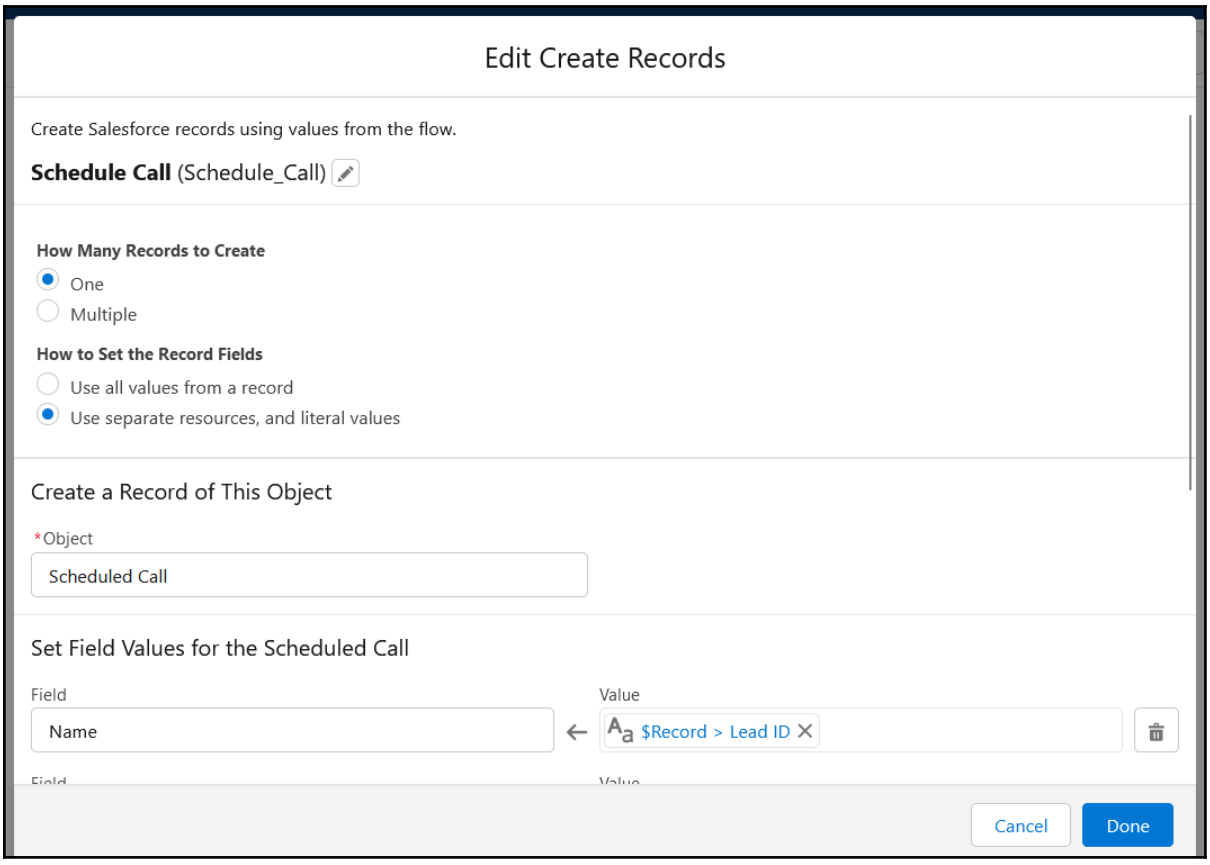


Fig 10: Create records in flow

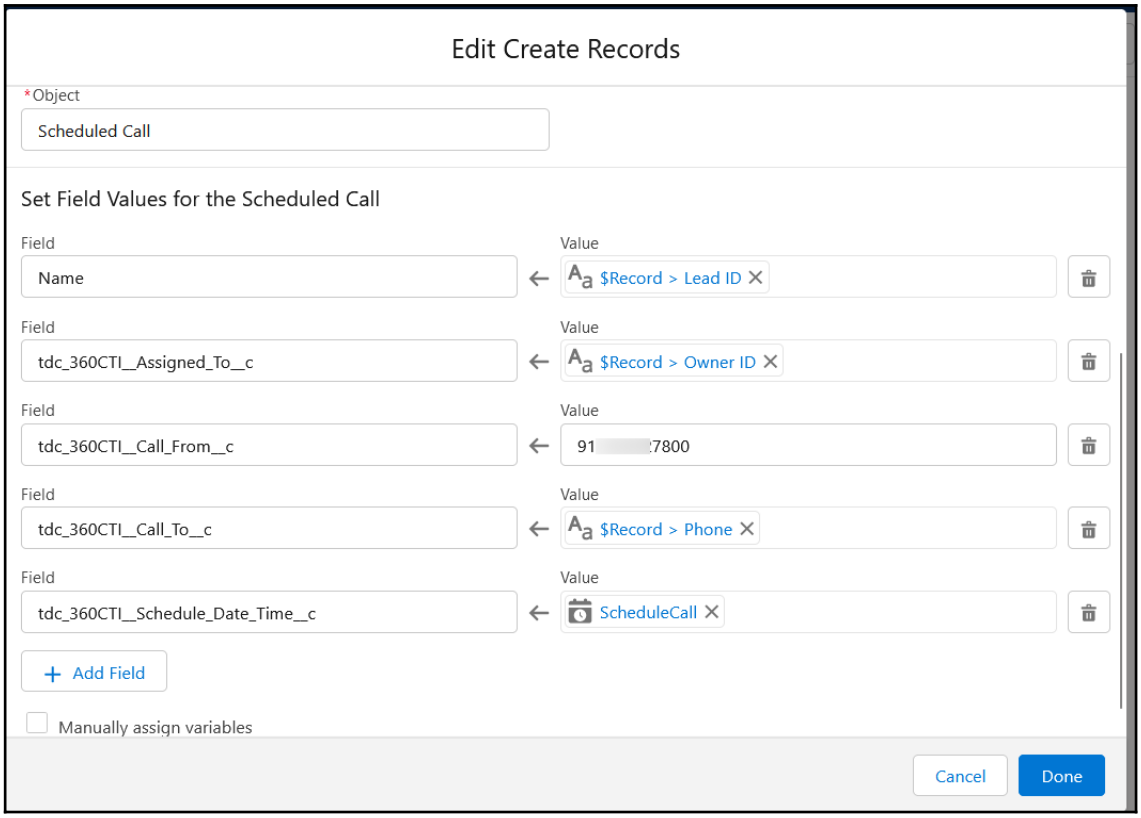


Fig 11: showing the 6 fields required for scheduling call

- **Name:** The ID field of the triggered object/record must be provided.
- **Assigned To:** This is a mandatory field. The scheduled call will be triggered by the respective record owner only.
- **Call From:** Specify the Calling CTI Number, which is the number from which the call will be triggered. You can also use a referenced field like Lead.Owner.CTI_Number_c to send from different salespeople, or a formula to assign different numbers based on geographies.

  Note- The number displayed in the "Call From" should match the number specified in the CTI Setup tab.

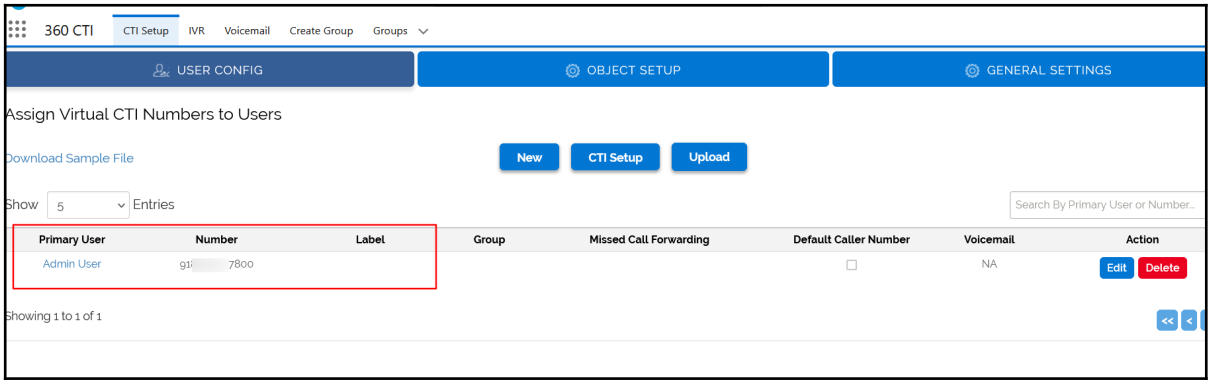


Fig 12: CTI Setup

Although we have hardcoded the phone number for incoming calls, it is specifically assigned to the admin. However, in situations where users within an

org have different record owners, we prefer calls to be made using the CTI number assigned to the respective record owner, rather than the hardcoded number. This ensures that each user utilizes their designated CTI number. To achieve this, we will navigate to the user record and follow the specified steps. If the user specifically wishes to make calls using the CTI number of the Lead Owner, please follow the provided instructions:

1. Navigate to User Object.
2. Add a text field with name CTI_Number, or any name according to your preference.
3. Manually add CTI numbers to every user record in the CTI number field.



Fig 13: CTI Number Assignment

4. Navigate back to the “Edit Create Records” and add the value for the Call From field as shown in the image below:

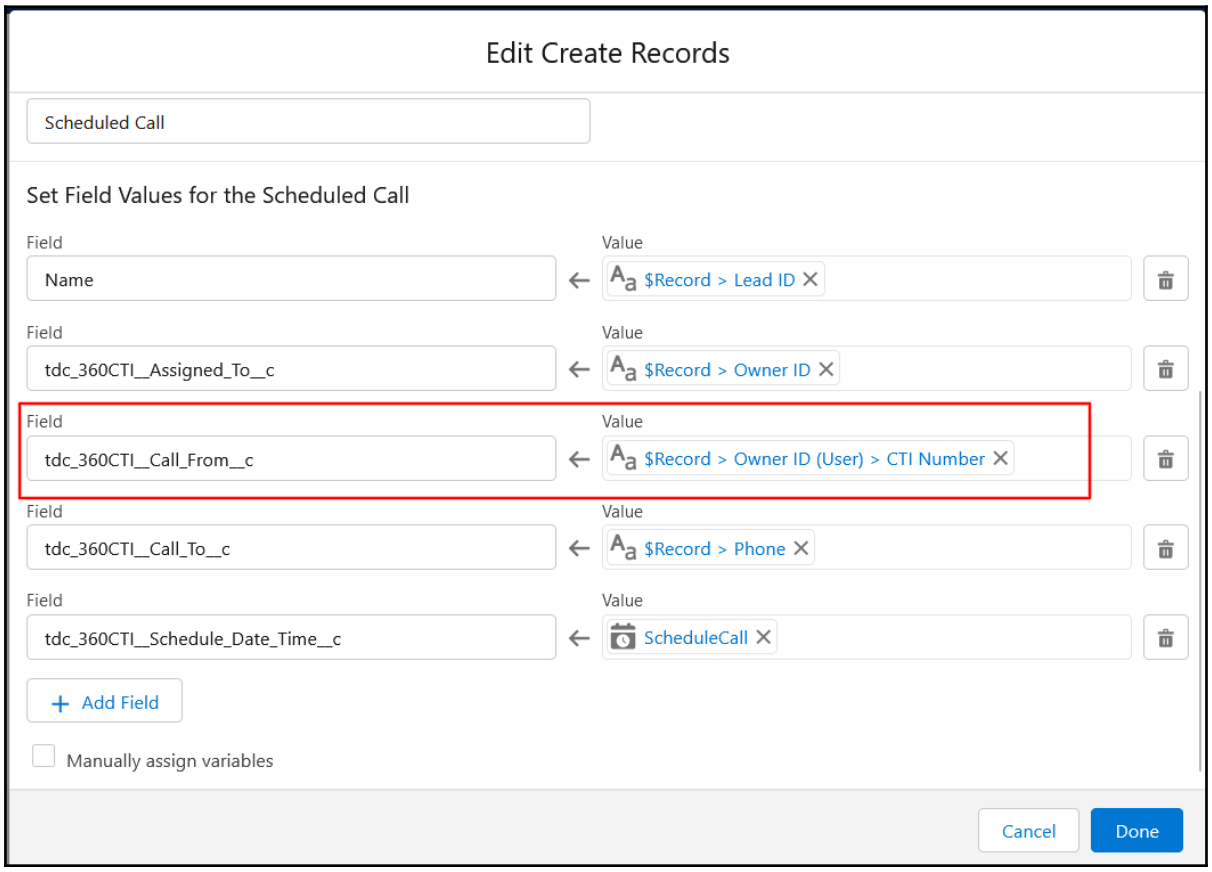


Fig 14: Call From Field Value

- **Call To:** Provide the API Name of the phone field to which you want to make a call to. It can be a string like "MobilePhone" or "Mobile_Phone c" (for a custom field), or you can reference the actual phone value from the record, such as Lead.MobileNumber.