



PhoneIQ

All in one cloud communications platform
for Salesforce Lightning

Cloud Phone System

Telephony

Salesforce Call Routing



Salesforce CTI

Call Center

Live Analytics



File Sharing

Messaging

Team Collaboration



Voice & Video

Meetings

Team Collaboration





Traditionally, deploying and managing enterprise communication technology has been an overly complex burden for IT, requiring costly hardware, certified professionals and inflexible carrier contracts to deploy legacy systems that aren't designed to dynamically scale and adapt to the ever changing requirements of an increasingly competitive business environment.

PhoneIQ leverages cloud technology and the Salesforce platform to totally transform the way businesses deploy and manage communications infrastructure. With a single click via the AppExchange, Salesforce admins can install and manage PhoneIQ from within their Salesforce org. and deploy hundreds or even thousands of users in a breeze across locations, without the need of hardware, technical knowledge or telecom contracts. Our robust telecom network offers instant provisioning of phone numbers in over 50 countries and global SIP trunking technology with unlimited call throughput, helping businesses connect with customers locally while eliminating the risk of rejecting calls due to limited calling capacity, or pay for connectivity they won't use. Through an unmatched Salesforce integration, PhoneIQ delivers advanced automation capabilities designed to log every interaction with customers and prospects, effectively eliminating manual CRM data entry, while providing advanced tools like Salesforce powered call routing, realtime reporting and much more, to ensure your company delivers a truly unique and memorable customer experience.

Deploy and manage hundreds of users in minutes. No hardware required.





For Service Cloud

PhonelQ for Service Cloud helps companies deliver an amazing customer experience by integrating next generation cloud call center technology with the ultimate customer success platform. By using Salesforce powered call routing technology and integrating with Salesforce Omni-channel, PhonelQ connects callers to the right agent every time while providing all the necessary data and tools to agents so they can deliver a truly unique experience.

Managers can leverage powerful workflow automation tools to create cases, log customer interactions and capture key data in Salesforce like call recordings, customer mood and customer satisfaction levels. Using live monitoring and prebuilt Salesforce Dashboards, supervisors can instantly track call center KPI's and overall efficiency, and resort to powerful coaching capabilities when needed.



Key Features



Workflow Automations: Automate repetitive tasks like call logging and automatic case creation based on events like connected calls, missed calls, voicemails and more.



Salesforce Call Routing: Improve your call center efficiency by connecting your IVR with Salesforce and matching callers to open cases and routing them to the corresponding agent.



Live Monitoring: Gain real-time visibility into your call center KPI's. Coach agents and track overall results with call monitoring, whisper and barge.



Omni-channel Integration: Integrate your call center with Salesforce omni channel to ensure tasks are not routed to agents handling calls. (coming soon)



For Sales Cloud

PhoneIQ for Sales Cloud helps accelerate sales productivity, increasing connection rates with advanced features that integrate natively with Salesforce, like: power dialing, click to call, screen pop, local presence and more, designed to make sales reps more productive.

Offering the only true unified communications solution for Salesforce Lightning, PhoneIQ allows sales reps to connect with prospects and customers using telephony, online meetings and screen sharing from a single platform that automatically logs every interaction and provides reps with in call tools, like: notes, tags, Salesforce object creation, event association and more.

Our blended call center platform works great for both inbound and outbound sales teams.

Sales Managers can instantly track team productivity and call outcome using PhoneIQ's prebuilt Salesforce Dashboards, the real time call activity log and the Live Supervisor Console that delivers built in rep coaching capabilities.



Key Features



Power Dialing: Accelerate through Dialing Sessions with Dynamic Call Lists. Import Salesforce Leads, Contacts or Accounts views into the dialer and kickstart productive sessions.



Local Presence: Call prospects and customers from local area codes to increase connection rates by as much as 400%.



Automated Data Entry: Leverage powerful automation technology to log every call and sales interaction directly in Salesforce.



Track Call Outcome: Allow reps to add comments, tags and disposition codes to their customer interactions and allow management to visualize this data via Salesforce dashboards.



Salesforce CTI Guide

Softphone

Make and take calls, leverage screen pop, click to dial, online meetings, instant messaging and much more from a single dialer.

Post call information

Caller mood

Call disposition code

Call purpose

Assign call

Add comment

Skip this Save call info

ACTIONS	ACTIVITY
	Add comment >
	Add tags >
	Assign to case >
	Assign to opportunity >
	Assign to account >
	Create task >
	Create event >

After Call Work

Easily set up custom disposition codes, customer mood score, call purpose, tags and other call related data for agents to complete after a call ends

Dialing Lists

Increase connection rates with power and auto dialing functionality. Import contacts, leads and accounts directly from Salesforce.

RECENT CALLS	CALL LIST
Sales 16 calls in list Add calls	
	William Grimes CEO - Apple Inc.
	Fred Durst Engineer - The Boring Company
	Jerry Horton Delivery - Zero
	Dave Buckner CEO - Tesla
	Mark Watson VoIP Engineer - Zero
	James Barker Quality Assurance - Facebook Inc.
	Tom Morella Press - Vanity Fair
Clear all Dial next call	



Salesforce CTI Guide

Workflow Automations

Streamline processes and eliminate manual data entry with PhonelQ's automation layer for call logging, case & task creation and more.

	Outbound calls	>		Log as call	>	in		Salesforce
	Canceled calls	>		Log as call	>	in		Salesforce
	Inbound calls	>		Log as call	>	in		Salesforce
	Missed calls	>		Create case and log call	>	in		Salesforce
	Abandoned calls	>		Log as call	>	in		Salesforce



PhonelQ
Contacts: 346



Salesforce
Contacts: 346



27

Contacts
created in PhonelQ

56

Contacts
updated in Salesforce

Contact Sync

Setup real time, bidirectional, contact sync between Salesforce and PhonelQ to keep contact data always up to date.

Salesforce Call Routing

Automatically connect callers to the right agent with Salesforce powered IVR technology. Route calls to lead, contact, account, case or opportunity owners

Setup Salesforce call routing

Rules

If the Caller  is a lead



+ Add action

then >

Dial

Lead owner

☒ Check user availability: If user is unavailable then



Dial

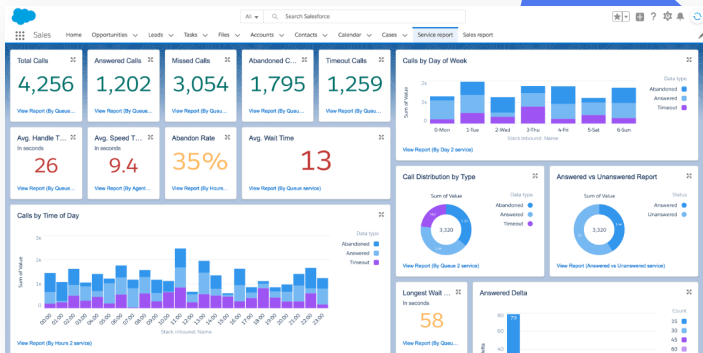
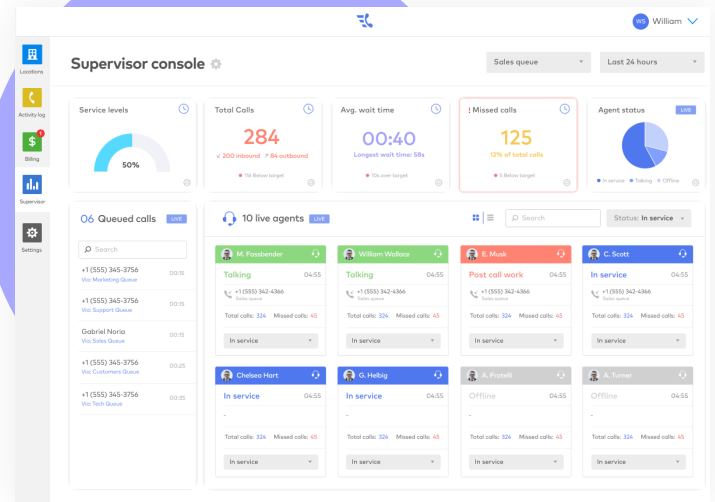
SDR Inbound Queue



Salesforce CTI Guide

Live Console

Gain real time visibility into call center KPI's and agent activity. Use coaching features to increase performance.

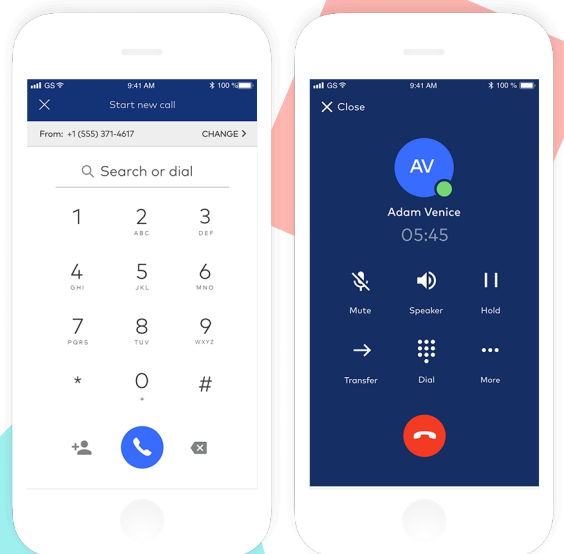


Dashboards & Analytics

Setup real time, bidirectional, contact sync between Salesforce and PhoneIQ to keep contact data always up to date.

Agent Mobility

Make and take business calls, listen to voicemails, or instant message from the office or on the go using PhoneIQ for iOS and Android, while keeping all activity in sync with Salesforce.





Main Features



IVR

An IVR or phone menu automatically routes callers to the right recipient. An IVR helps create a professional customer experience while increasing agent efficiency.



Business Hours

Add custom business hours to your different phone numbers based on your unique business needs.



Queue Announcements

Automatically announce the position of each caller on the hold queue.



Cold & Warm Transfer

Agents can choose between cold transfer or warm transfer. Warm transfer allows them to check in with their colleague before transferring the call.



Automatic Call Recording

Better monitor your team's performance and the quality of your service by recording calls and listening back on them.



Call Queues

Keep callers on hold until the next teammate is available with advanced call queuing. Select between multiple call distribution systems and leverage advanced options to personalize the on hold experience.



Voicemail

Easily personalize your greetings and leave of absence messages. Listen to your voicemails from your PC, mobile, deskphone or receive them via email.



Call Tagging

Tag inbound and outbound calls to easily filter and find important calls.



Main Features



Notes & Comments

Add call summary notes and disposition codes to your call logs to ensure relevant customer information is retained inside Salesforce.



Extension Dialing

Every teammate can be easily reached by dialing their unique 3 or 4 digit extension number.



Local & Toll Free Numbers

Instantly access local phone numbers in 50+ countries, allowing customers to call a familiar number at a local rate. Operate in any country without having to open an office.



Global Outbound Calling

Call phone numbers in 190+ countries with HD quality and at the best rates in the industry.



Voice Meetings

Host conference calls and connect with up-to 40 participants with cloud based call conferencing. Easily invite, kick or mute participants on the fly.



Video Meetings

Host multiparty conference calls and connect with up-to 6 participants with cloud based video conferencing. Easily invite, kick or mute participants on the fly.



Cold & Warm Transfer

Agents can choose between cold transfer or warm transfer. Warm transfer allows them to check in with their colleague before transferring the call.



Call Tagging

Tag inbound and outbound calls to easily filter and find important calls.



PhoneIQ

Book your demo

or

Start your free trial

www.phoneiq.co



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