Case Study: Heritage Home Buyer

Call and SMS Routing in LeftMain
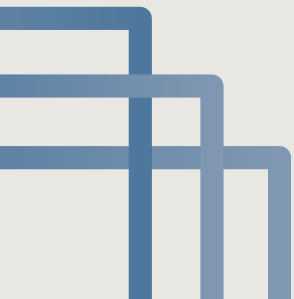
Summary

The project aimed to enhance the communication system within the Salesforce environment by implementing a sophisticated call and SMS routing mechanism. The primary objectives included establishing dual-leg call routing, customizing user-specific call log access, clearing existing call logs, preventing new entries, setting a default caller number, managing outbound call routing, generating detailed reports on call and SMS activities, and troubleshooting SMS display issues.

Challenges

Dual-leg Call Routing Configuration:
- Setting up a system where incoming calls to a designated number would ring User A for 15 seconds and, if unanswered, forward to User B for an additional 15 seconds.

User-specific Call Log Access:
- Customizing Salesforce to ensure that users could only view their own call logs, thereby enhancing privacy and data security.

Clearing and Preventing Call Log Entries:
- Removing all existing call logs from the system and preventing the creation of new entries to maintain a clutter-free environment.

Default Caller Number Configuration:
- Setting a default caller number to streamline the outbound call process and maintain consistency in communications.

Outbound Call Routing:
- Handling the routing of outbound calls to ensure they are directed appropriately and efficiently.

Call and SMS Activity Reports:
- Generating comprehensive reports detailing call and SMS activities for performance monitoring and analysis.

SMS Display Troubleshooting:
- Addressing issues related to the display of SMS messages to ensure clear and accurate communication.

Solutions Implemented:

Dual-leg Call Routing:
- Implemented a system where incoming calls to a designated number first ring User A for 15 seconds. If unanswered, the call is forwarded to User B for an additional 15 seconds. This ensures that calls are not missed and are attended to promptly by a backup user.

Customizing Salesforce Access:
- Configured Salesforce to allow users to view only their own call logs. This involved setting up specific permissions and visibility rules to enhance user privacy and data security.

Clearing and Preventing Call Log Entries:
- Cleared all existing call logs from the system and implemented measures to prevent new entries from being created. This helped maintain a clean and organized call log environment.

Default Caller Number Configuration:
- Set a default caller number for outbound calls to ensure consistency and streamline the calling process. This configuration helps in maintaining a professional image and easy identification.

Managing Outbound Call Routing:
- Ensured that outbound calls were routed efficiently, minimizing delays and improving the overall communication workflow within the organization.

Generating Reports:
- Developed detailed reports on call and SMS activities. These reports provided valuable insights into communication patterns, helping in performance analysis and strategic decision-making.

Troubleshooting SMS Display Issues:
- Identified and resolved issues related to the display of SMS messages, ensuring clear and accurate communication. This included fixing formatting problems and ensuring compatibility with various devices and platforms.

Outcome:

The implementation of these solutions significantly optimized call handling and enhanced operational efficiency within Salesforce for Heritage Home Buyer. The dual-leg call routing ensured prompt response to incoming calls, while the customized access to call logs maintained data security and user privacy. Clearing existing call logs and preventing new entries helped maintain an organized system. Setting a default caller number and managing outbound call routing streamlined the communication process. Detailed reports provided valuable insights, and troubleshooting SMS display issues ensured clear communication.

Overall, these enhancements contributed to a more efficient and effective communication system, supporting Heritage Home Buyer's operational goals and improving customer interaction.