



QuickFlo Record Sync

Built to extend and enhance existing CCaaS investments.

POWERED BY QUICKFLO · DEPLOYED AND CONFIGURED BY OUTBOUND GOAT

QuickFlo Record Sync moves leads from your CRM into Five9 in seconds. Its genuinely event driven, with no polling delay. It's deployed and configured by OUTBOUND GOAT in days, not months. It layers directly onto the Five9 platform you already run, adding the automation, visibility, and self-serve control that turn a working CCaaS investment into a fully leveraged one.

CORE CAPABILITIES

✓ Real-Time CRM Triggers

Leads land in seconds, no polling.

✓ DNC Suppression Built Into Sync

Suppressed before the record ever leaves your CRM.

✓ No-Code Visual Builder

Ops teams change logic themselves.

✓ Multi-App Orchestration

Five9, Slack, and a database in one run.

✓ Inline Data Transformation

Liquid, Regex, JSONLogic in transit — e.g., set outbound ANI with no Salesforce logic.

✓ Proactive Sync Health Alerts

Notifies you the moment a connection drops or records fail.

✓ Visual Step-by-Step Logs

See exactly where a record failed.

✓ Self-Serve Rule Changes

No developer needed.

✓ Separate Batch and Ad Hoc API Lanes

Bulk uploads never crowd out single record delivery.

✓ Contact Record Splitting

Records with more than three phone numbers split automatically.

PLANS

Plan	Growth	Scale	Enterprise
Record updates / mo	Up to 300k	Up to 1M	5M+
CRM connections	1 CRM + dialer	Multiple CRM + dialer lists	Custom
Sync type	Event-driven (seconds)	Event-driven (seconds)	Custom
Retry logic	✓ Per-failure type	✓ Per-failure type	✓
Field transforms	Custom (ANI, composites, routing)	Advanced multi-list routing	Custom
Per-record log	✓	✓	✓
Support	Priority	Same-business-day email	Dedicated success mgr

WHY TEAMS ADD QUICKFLO ON TOP OF FIVE9

01 · FLEXIBILITY

Ops owns the logic.

No-code visual builder means the team running campaigns can add a rule or fix a mapping without opening a ticket.

02 · REACH

One workflow, extended stack.

QuickFlo drives Five9, Slack, and your data warehouse from the same trigger — reaching beyond the dialer without adding a separate system.

03 · CLARITY

See every step, not just pass or fail.

A visual execution graph shows exactly where a record succeeded or failed, instead of a flat server log.

OUTBOUND GOAT: <https://www.outboundgoat.com> | QUICKFLO: <https://quickflo.app>