BENEVOICE FOR SALESFORCE

Configuration guide

Version 1.45.3

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Contents

1 Salesforce tenant level configuration

The guide applies to BeneVoice for Salesforce version 1.45.3 onwards.

1.1 Installation Prerequisites

- My Domain must be enabled; https://help.salesforce.com/articleView?id=domain_name_overview.htm&type=5
- Translation Workbench must be enabled; https://help.salesforce.com/articleView?id=customize_wbench.htm&type=5

  Package contains translations for Finnish and Swedish. Those languages need to be activated in order for the translations to show.

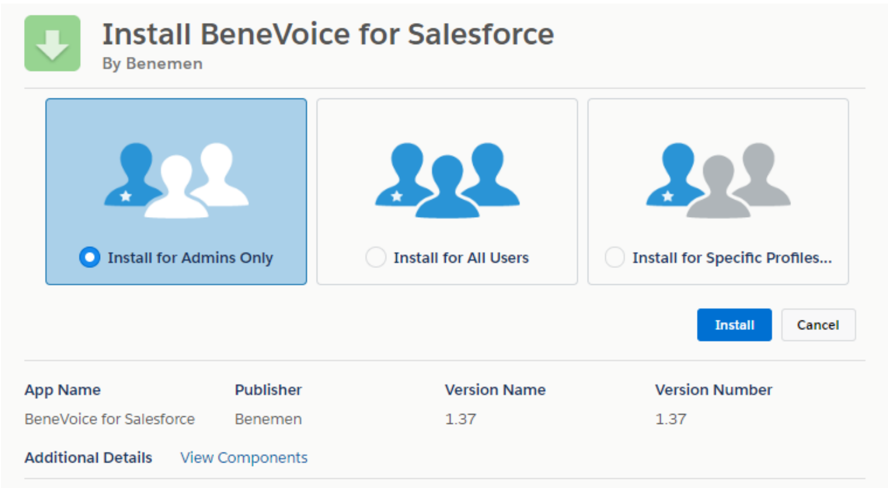
Note: The following is not required for the standard installation, but is prerequisite for Omni-Channel availability integration configuration.

  - Enable Salesforce Omni-Channel settings; https://help.salesforce.com/articleView?id=omnichannel_enable.htm&type=5

1.2 Install BeneVoice for Salesforce package to Salesforce tenant

a. Install BeneVoice managed package via installation URL provided by Benemen and login to appropriate Salesforce org with System Administrator credentials

   You will see the following dialog view -> Install for Admins only -> Install



b. Wait installation to complete. This may take couple of minutes. Admin shall receive email notification about completion and BeneVoice package will be visible in Installed Packages view


Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall | Manage Licenses	BeneVoice for Salesforce	Benemen	1.37	BenemenPhone	Active	3	1	Does not Expire	14.5.2020 11:54		2	4	7	Passed

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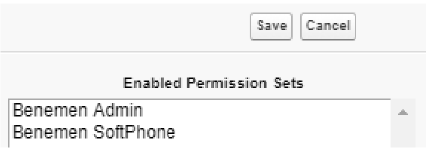
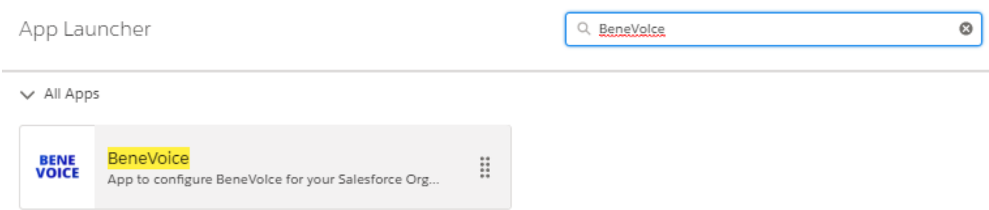
c. With **Site License** type all end users are automatically licensed.
If **User License** type is used, use Manage Licenses option to assign license to relevant admins and end users. By default User License installation comes with 3 user licenses. Please consult Benemen for additional agreed licenses. Please see chapter 2 for end user activation details.

d. Add Admin user used for the configuration steps to “Benemen Admin” and “Benemen SoftPhone” Permission sets

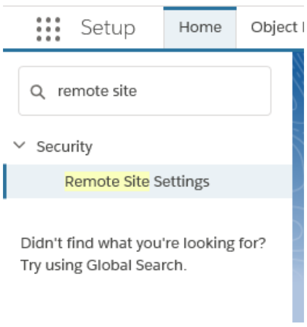


e. Admin user will now see and can open BeneVoice app listed in App Launcher and continue to the next configuration step



1.3 Configure Remote Site Settings for Benemen Discovery URL

a. As SF admin go to Setup -> quick search “Remote site settings”



b. In Remote Site Settings view -> New Remote Site

c. Add new site

Name: BeneVoice (this can be anything)

Remote Site URL: < Benemen Discovery URL provided by Benemen>

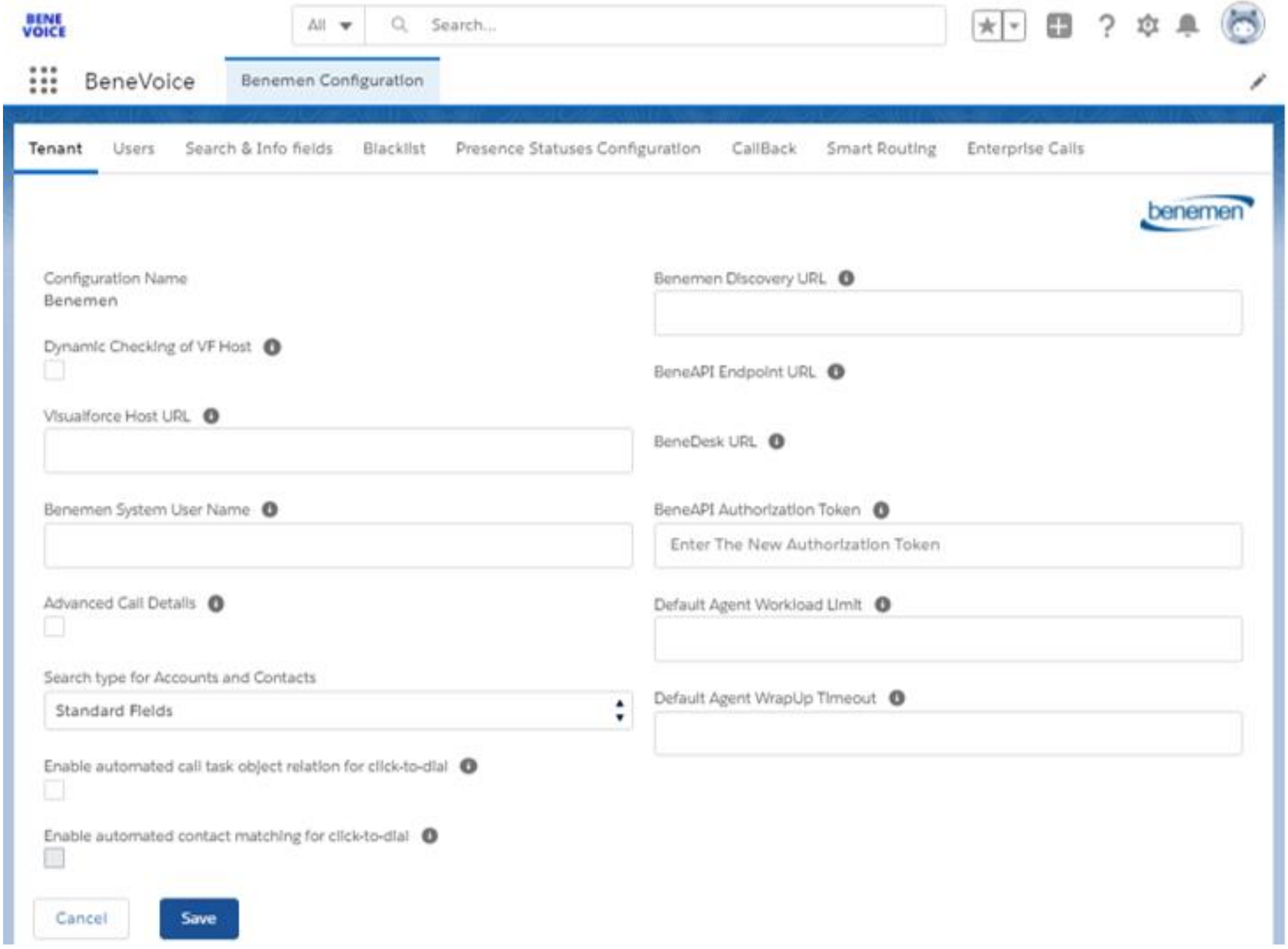
Active checkbox: checked

1.4 BeneVoice Configurator

1.4.1 Tenant Configuration

a. Go to BeneVoice app -> Benemen Configuration -> Tenant

b. Click ‘Create new configuration’ -> Edit



c. See below guidance for configuring different settings.
d. Save when ready -> Wait until page updates (may take few seconds)
e. Copy BeneAPI Endpoint URL and add it as new site in Remote Site Settings (chapter 1.6)

Configuration name

Benemen (created automatically)

Dynamic Checking of VF Host

This is optional setting. Monitors possible VF Host URL changes and updates. This is automatically enabled when saving configuration for the first time. Recommended to disable at latest when BeneVoice web phone login is verified.

Visualforce Host URL

Obtain URL by going to Setup -> Visualforce Pages
Find and open 'Softphone2' and go to Preview
On Preview browser page copy URL ending *force.com* (do not copy the last part */apex/SoftPhone#/)*
Example: https://customerorg--benemenphone.visualforce.com
Paste copied URL to Visualforce Host URL field

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Benemen System User Name

Benemen provides Benemen API system account user name used in the configuration.

Advanced Call Details

This is optional setting. Check this option, if you would like to include additional call details in Call Task Activities (possible queue wait time and URL to access BeneCloud call recording).

Advanced Call Details Retrieval Interval (in seconds)

Call activity record is created when the phone call is ended. Advanced call details are added and saved to the record after configured time interval. 10 - 300 seconds.

Benemen Discovery URL

The URL is provided by Benemen. Used to query BeneAPI Endpoint and BeneDesk URL's. This URL must be added in Remote Site Settings.

BeneAPI Endpoint URL

Read only field, created automatically. Used to access BeneAPI. This URL must be added in Remote Site Settings.

BeneDesk URL

Read only field, created automatically. Used with advanced call details link creation.

BeneAPI Authorization Token

BeneAPI Authorization Token is provided by Benemen.

Default Agent Workload Limit

This is optional setting and used only if Customer is using Salesforce Omni-Channel and BeneVoice Omni-Channel availability integration is used.

Numeric Agent workload value. Leave empty if not used.
If Agent's omni-channel workload is the same or higher than the configured numeric value, Agent's omni-channel status is changed to "In a Case" and Agent is set to offwork status in Benemen Voice service channel. Agent will remain online in the omni-Channel, but will not be allocated service calls until the workload value goes lower than the configured numeric value.

Default Agent Wrap-Up Timeout

This is optional setting and used only if Customer is using Salesforce Omni-Channel and BeneVoice Omni-Channel availability integration is used.

Wrap Up time (in milliseconds) after ending answered call. Leave empty if not used.
During Wrap Up availability status, user will remain as Busy in Omni-Channel and will not be allocated any new work items or calls.

Search type for Accounts and Contact

Standard fields: Use for the best performance. Direct search to standard Phone and MobilePhone fields. To match, Phone numbers must be stored in exact E.164 format (e.g. +358401234567).

Formula fields: Phone numbers can be stored in non-E.164 format. Search through special formula fields. Search performance may decrease if used against large contact&account databases.

Enable automated call task object relation for click-to-dial

This is optional setting. By default outbound click-to-dial call task activities are not automatically related to the object where click-to-dial was initiated from. Also possible contact / account matching is done only by phone number.
When this setting is enabled, call task activity is automatically related to the object, where click-to-dial was initiated from.
This setting applies on the tenant level. The setting is also available in Users configuration if needs to be enabled on a user level.
Note: Pre-requisite for this to work is that the object is by design or by admin enabled for 'Track Activities'. Exceptions are Contact object where identification is done independently and Task object, where only contact matching is applied.

Enable automated contact matching for click-to-dial

This is optional setting.
Note: This setting requires that 'Enable automated call task object realtion for click-to-dial' is first enabled.
If the object where click-to-dial was done includes relation to a single contact record, the contact is automatically matched in the created call task activity.
This setting applies on the tenant level. The setting is also available in Users configuration if needs to be enabled on a user basis.

Use Account / Contact / Lead Override

Salesforce has the possibility to override actions for example the standard New button: *"Overriding a standard button or link changes what happens when a user clicks on it. For example, instead of having a standard Salesforce page appear when a user clicks View, you can have the View button launch a custom s-control, Visualforce page, Lightning component, or Lightning page instead."*

On the dialog windows there is a New button. If the standard overriding is wanted to be applied on this dialog window "New" button also the checkbox Use Account Override / User Contact Override / User Lead Override for the relevant object need to be set true.

1.4.2 Users Configuration

This chapter includes important tenant level dependencies and configuration requirements for user configuration. Otherwise Users configuration is handled in more detail within relevant End user configuration chapter.

- Agent List fetches all the users added to **'Benemen Softphone' permission set**
- **BeneVoice webphone** single sign-on experience by default automatically uses user's Salesforce user account Email attribute for mapping user's Benecloud user account. If User's Salesforce email attribute is different than Benecloud user acoount Email (username), then you need to manually use and enter BeneCloud user email in the BeneVoice user configuration
- Case and CaseDialog phone workflows require console navigation type of Lightning app for popping up chosen / new cases.

- Case and CaseDialog phone workflows involves automated Case creation. This may require additional configuration described below.
  - Please ensure via **Object Manager** that the used **Case layout** object allows automated case creation for BeneVoice enabled end users e.g. Default values for possible required case fields.
  - Please ensure that the following **Case related Object Settings** are enabled for BeneVoice enabled end users. This is usually done via **Setup -> Profiles -> <select user profile> -> Object Settings -> Cases** (please ensure first that Enhanced Profile User Interface is enabled via Setup -> Users -> User Management Settings)

Field Name	Read Access	Edit Access
Account Name	✓	✓
Case Origin	✓	✓
Contact Name	✓	✓

  - If customer is using some custom objects / fields for Cases, please make sure that users have at least Read access to these records.

- **Call Task Activities are recommended method saving call details**.
  However with Case and CaseDialog phone workflows, call details can also be saved directly in the worked Case object. **If selecting 'Save Call Info On Case' option**, please remember to add wanted call detail fields to the used **Case layout via Object Manager**. Relevant call info fields: *CallEndTime, Call Duration, Call Result, Phone Number 2, Call Type, Service Pool Queue, Queue Wait Time, Advanced Call Details.*

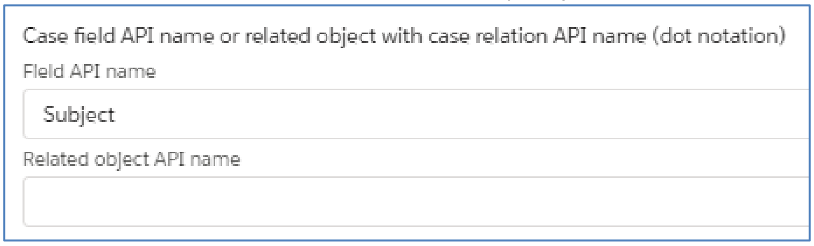
1.4.3 Search & Info fields

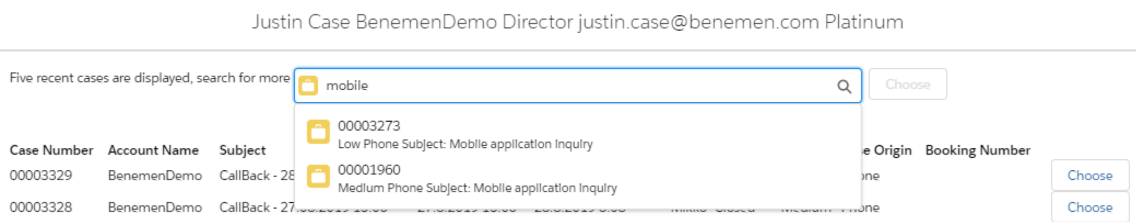
Optional configuration if default search options and info fields are not sufficient.

Additional Search strings:
Contact, Account and Lead are by default searched by Name.
Case is by default searched by Case Number.
Add here additional search variables for different objects.

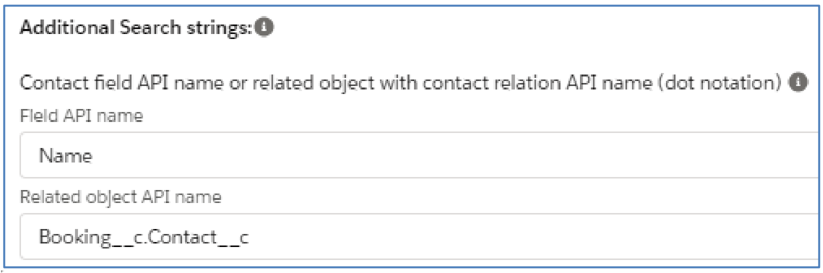
Examples:

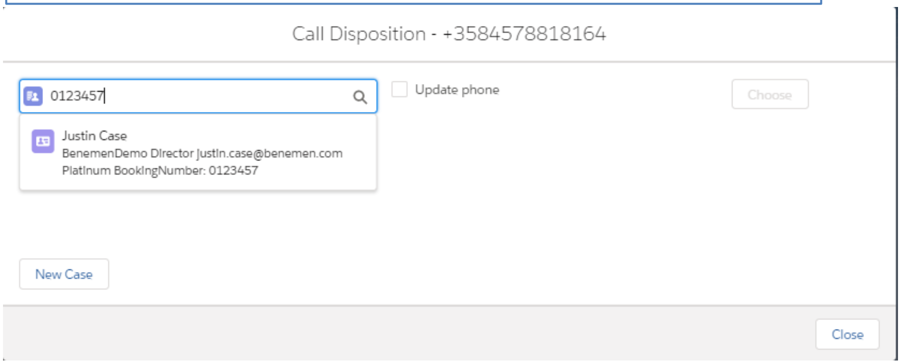
1) The below enables Case search also by Subject





2) The below enables Contact search also by custom Booking object with related Contact



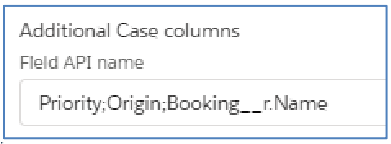


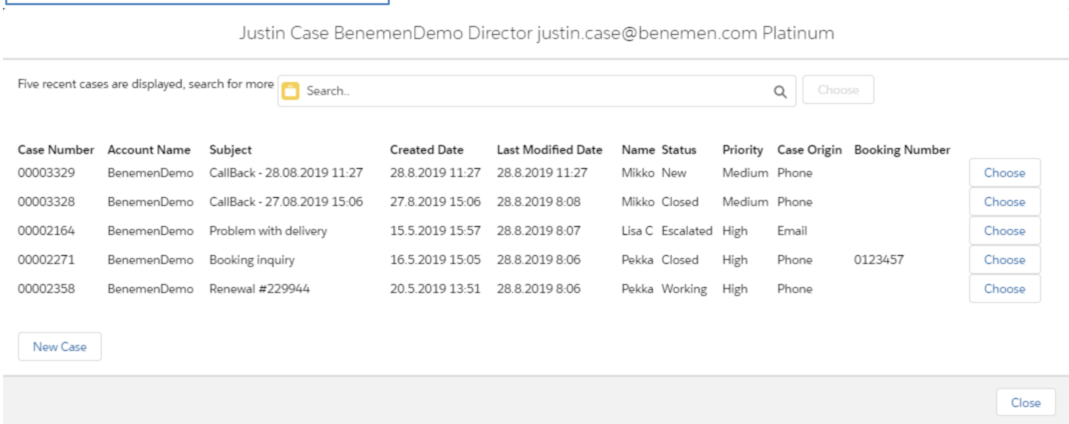
Additional Info fields:

Add here additional Info fields to be shown on workflow dialog windows.
Multiple fields can be added using semi-colon ";" separator.

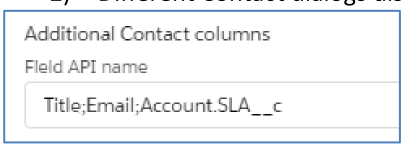
Examples:

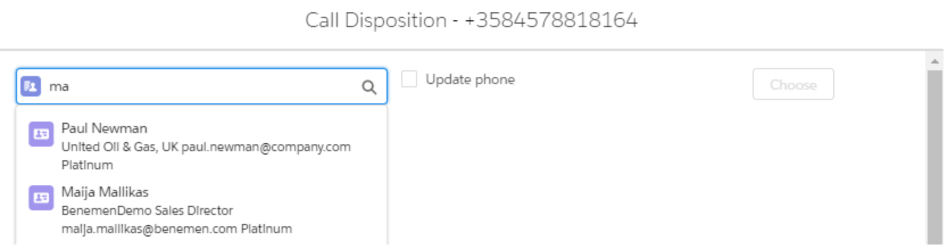
1) Case dialog displays also case priority, origin and custom case field Booking name value





2) Different Contact dialogs display also contact title, email address, SLA level for assigned account





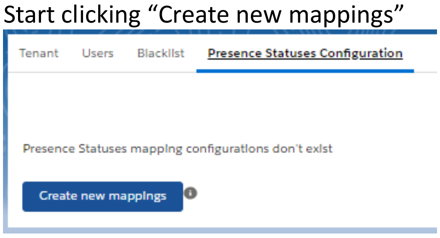
Note: Please ensure that end user profiles have at least Read access to all the fields and objects used in the configuration.

1.4.4 Presence Statuses Configuration

This configuration is valid only if Customer is using Salesforce Omni-Channel and BeneVoice Omni-Channel availability integration is used.

Here you will create mapping for configured Omni-Channel statuses on how they are affecting BeneCloud voice service availability.

a. Start clicking “Create new mappings”



b. Use ‘Add Config’ to map one by one existing Omni Presence Statuses
   - **Omni Presence Status** select from dropdown list existing Omni-Channel Presence Statuses
   - **BeneCloud Presence Status** map the status name you want to show on Benecloud side for selected Omni Presence Status. Free text. Note: applies only for OffWork type
   - **BeneCloud Presence Status Type** select either Available OR OffWork. Available = user is available in voice service channel. OffWork = user is not available in voice service channel

c. Please see below completed example. Note: You can mix statuses e.g. Available – Chat below is Online in configured Omni-Channel digital channels e.g. Chat, but BeneCloud status is mapped to OffWork for voice service channel

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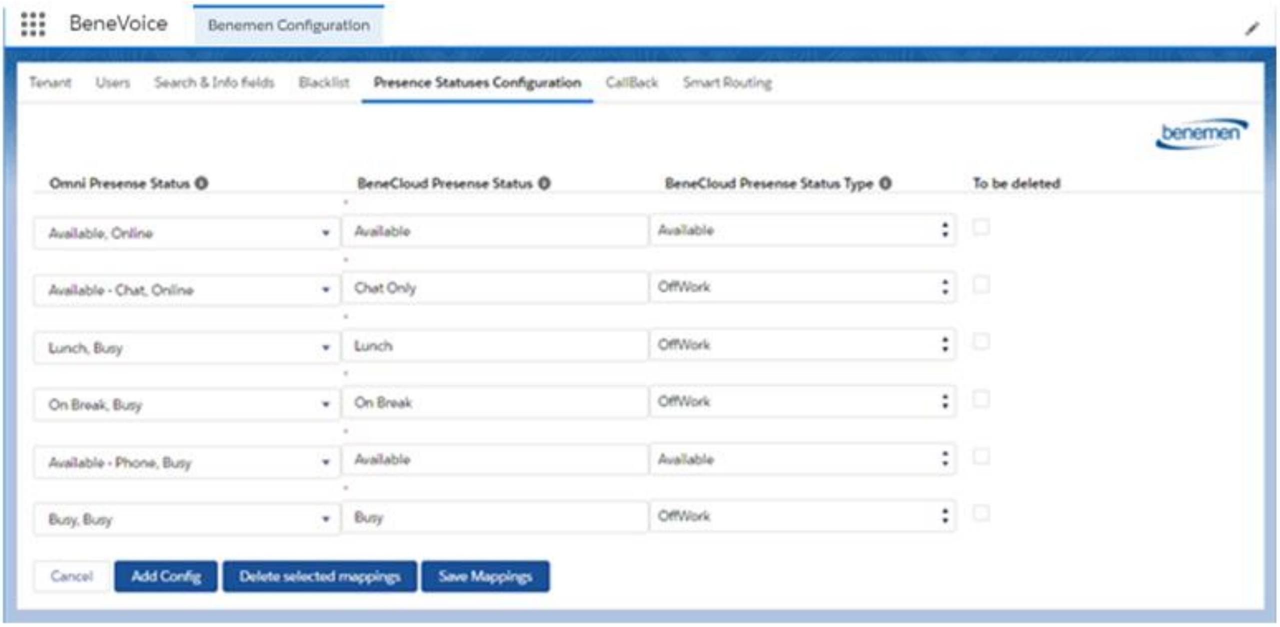


d. Complete by “Save Mappings”

Note: For possible not mapped user presence statuses, the default built-in mapping logic is used -> Actual presence status name with OffWork status is pushed to BeneCloud.

Note: Please see System Presence Statuses configuration for additional required system presence statuses configuration.

OmniChannel Fallback Status

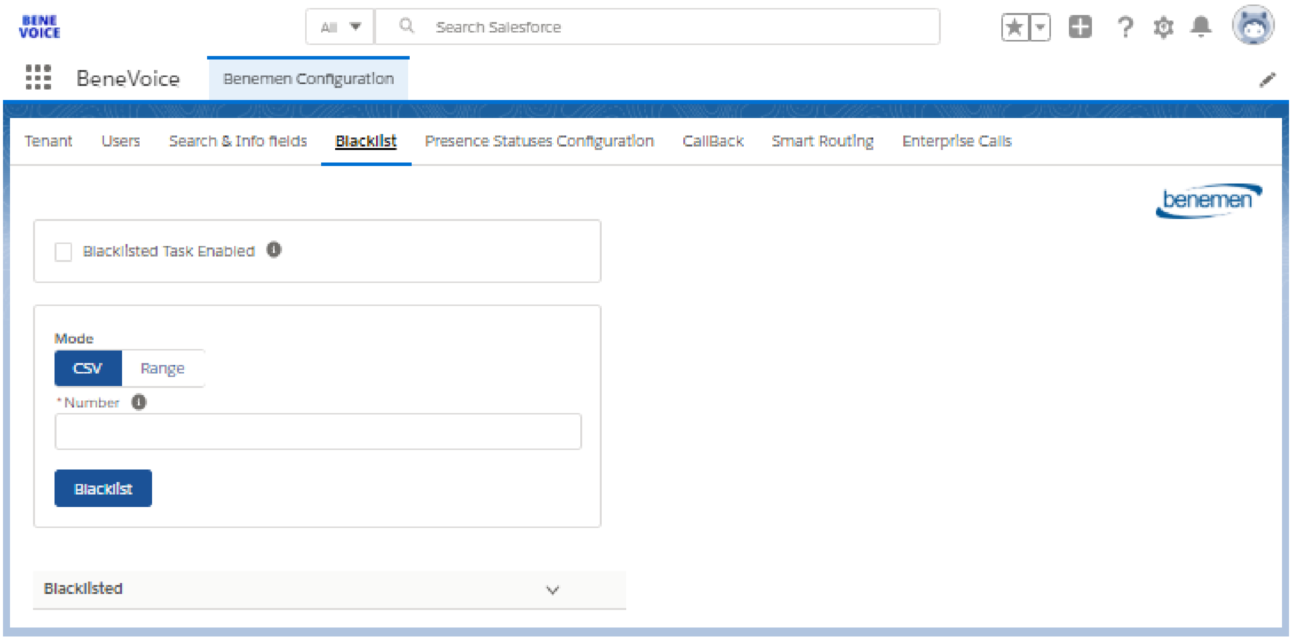
If the correct OmniChannel presence status can't be determined the presence status will be reverted to the Fallback Status. Fallback status can be set on the User Configuration page for each user in the selection “Fallback OmniStatus”. If left empty "Offline" will be used.

1.4.5 Blacklist Configuration

This is optional configuration, where Admin can add phone numbers excluded from possible workflow actions and call task activity creation. E.g. not creating Case / not opening contact, etc. Note: phone numbers must be created in E.164 format e.g. +358401234567.
Number can by added by Range or CSV option. CSV with comma or semi-colon separator if adding multiple numbers at once.

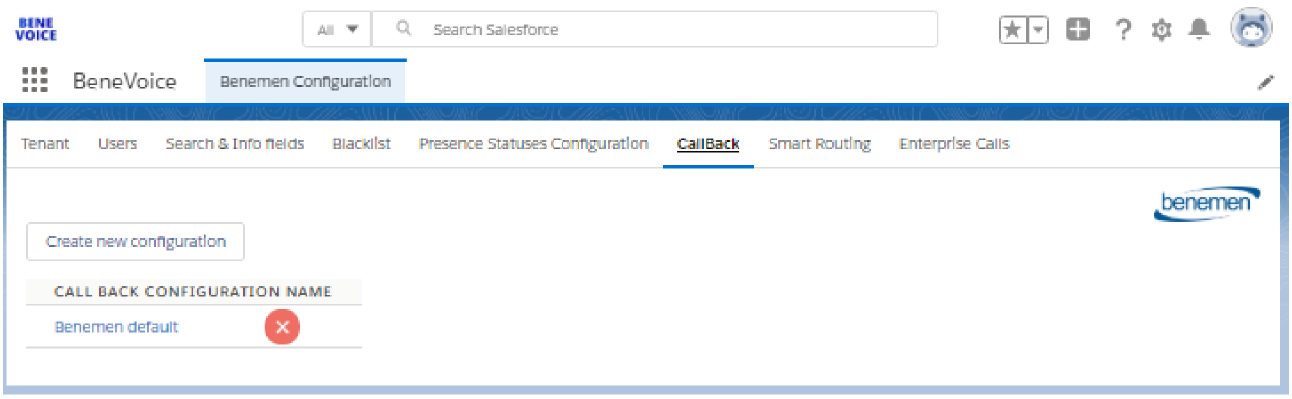
Blacklisted Task Enabled:

By default call task activities are not automatically created for blacklisted number phone calls. Checking this option will enable automated call task activity creation for blacklisted numbers.

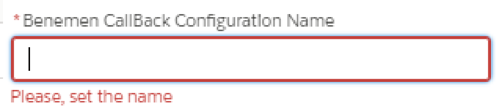


1.4.6 CallBack Configuration

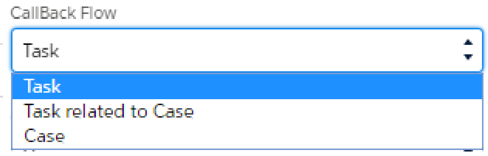
CallBack configuration is only valid if customer utilizes BeneCloud callback functionality and wants to integrate callback handling for certain callback lists within Salesforce, instead of BeneCloud user interface.
Callback service and lists must be first configured on BeneCloud side before adding integration configuration here.



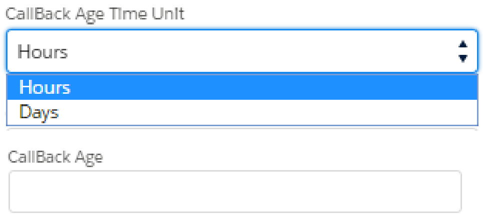
1. Click 'Create new configuration' button to start configuration
2. Give any name callback configuration name



3. Select wanted CallBack Flow
   Do you want to create callback request in Salesforce as Task, Task related to Case OR Case?

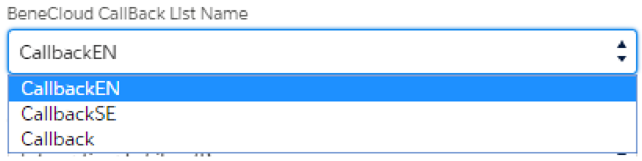


4. Select wanted CallBack Age Time Limit. Time unit for measuring CallBack age which should be retrieved from BeneCloud.
   Type wanted CallBack Age. This is age of open callback what should be retrieved.



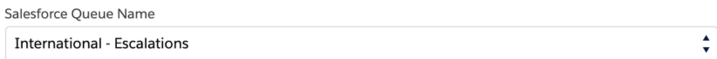
These are only valid when you start the job to retrieve callbacks from Benecloud side.
When callback job is active, it will always retrieve and create new callback requests within 15 seconds.

5. BeneCloud CallBack List Name dropdown list shows available callback lists configured on BeneCloud side. Select here appropriate callback list name you would like to integrate and handle on Salesforce side.



6. Select Salesforce Record Type for Case or Task

7. Salesforce Queue Name lists all the available Salesforce queues.
   Select here the Salesforce Queue you would like to assign callback Cases or Tasks.



8. Save configuration
9. Now that you have configured new callback configuration, you can Start the given callback configuration flow.

- Callback requests are only fetched from BeneCloud side while given callback configuration is started and running. Currently running configurations are indicated by icon 
- Similarly callback configuration can be stopped by admins. Currently stopped configurations are indicated by icon 

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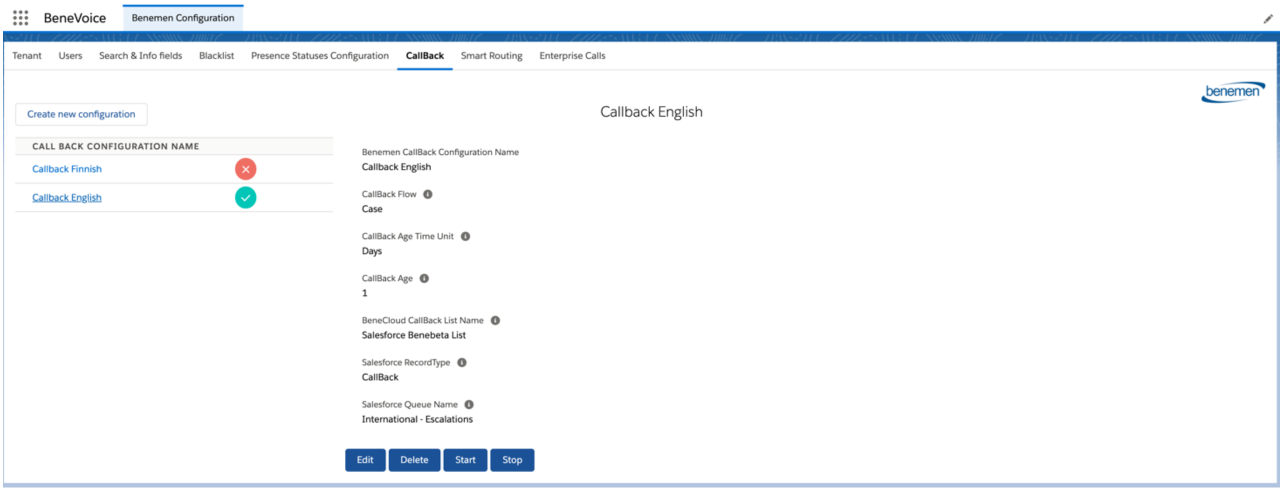


- As soon as callback request is fetched and created on Salesforce side, it is closed on BeneCloud side with 'Moved to SF' note.
- BeneVoice installation creates dedicated callback Case and Task record types and page layouts. Customer may modify these for own needs and also use their own record types and page layouts.
- Callback Case / Task subject is: "CallBack - <date & time when callback was left>"

  Subject CallBack - 28.08.2019 11:27

- Callback Case / Task specific fields are
  - CallBack ChannelIn , name of voice queue customer left callback request
  - CallBack CreationTime , original date & time customer left callback request
  - CallBack ContactNumber , phone number to call back to customer
  - CallBack Recording URL , URL to listen callback voice message left by customer

1.4.7 Smart Routing

Smart Routing functionality enables customer to dynamically route incoming phone calls based on Salesforce data. Smart Routing is typically activated on voice queues level and requires activation also at BeneCloud configuration side. This configuration is optional and only used when Smart Routing is needed.
Benemen provides detailed implementation steps in a separate BeneVoice for Salesforce - Smart Routing configuration document.

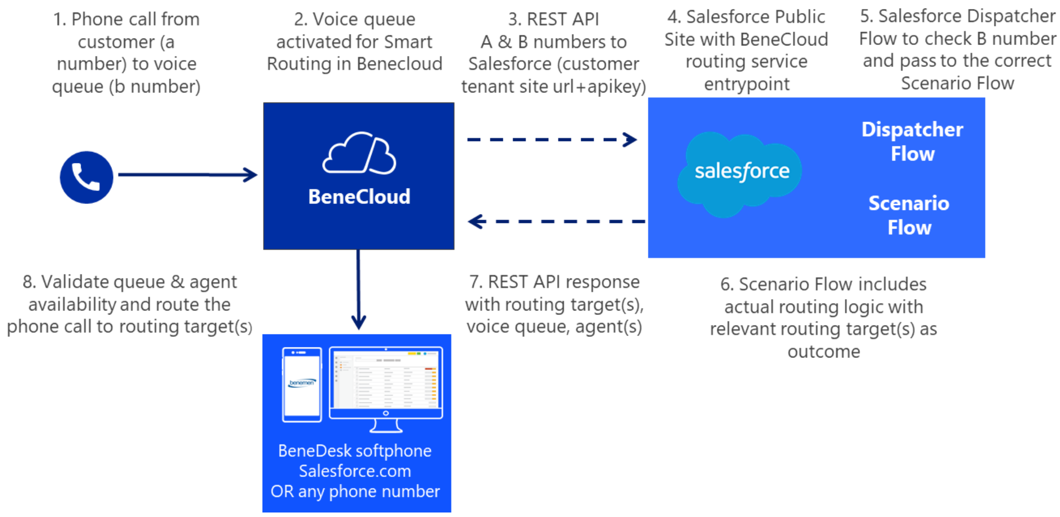
Native Salesforce Flows and Flow Builder is used to configure actual routing logic. Managed package includes two predefined Flow templates, which can be used and modified for specific customer scenario, when activating Smart Routing. Customer can freely create their own Scenario flows too.

Go to Setup -> Process Automation -> Flows and you will find the following two flow templates

Flow Label ↑	Process Type	A...	Te...	Package State	Package Name	Last Modifi...	Last Modifie...
SmartRouting_Dispatcher_Templ...	Autolaunched Flow	✓	✓	Managed-Installed	Benemen Cloud CTI	Mikko Siionsaari	27.11.2019 14:50
SmartRouting_Scenario_Template	Autolaunched Flow	✓	✓	Managed-Installed	Benemen Cloud CTI	Mikko Siionsaari	27.11.2019 14:49

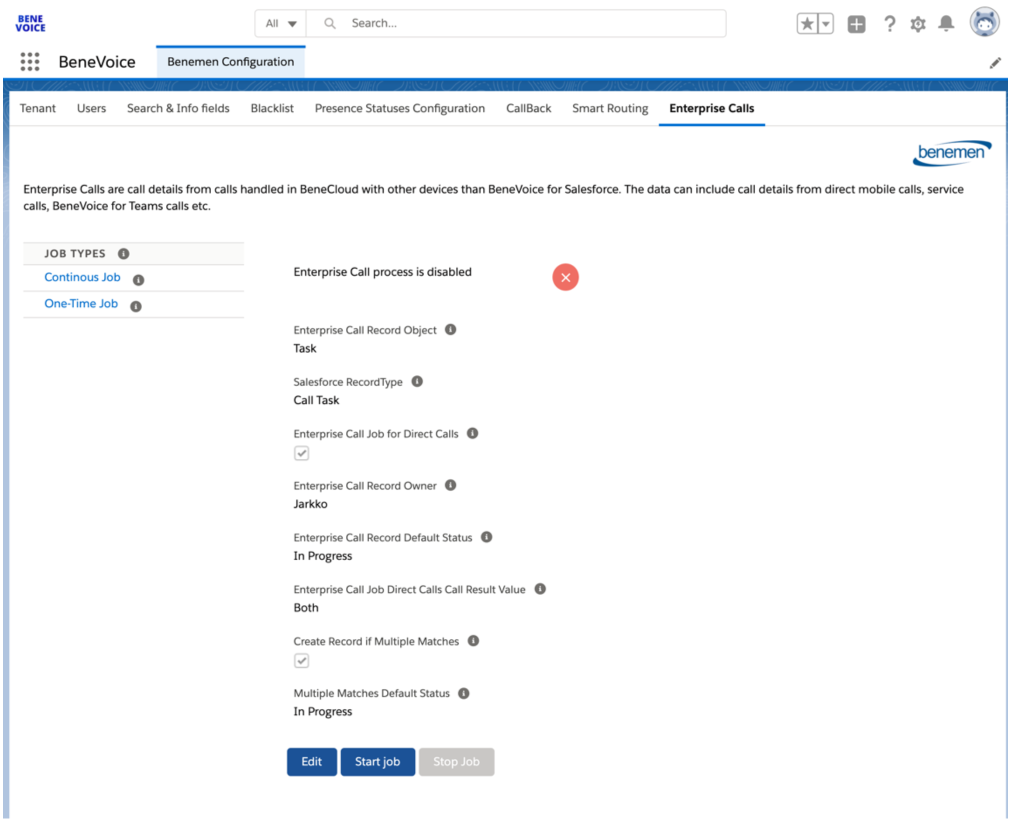
Admin can freely deactivate the templates although they are not themselves doing anything.

The below diagram describes the overall design. Otherwise Smart Routing configuration is described in a separate configuration guide.



1.4.8 Enterprise Calls

Enterprise Calls are call details from calls handled in BeneCloud with other devices than BeneVoice for Salesforce. The data can include call details from direct mobile calls, service calls, BeneVoice for Teams calls etc.



The module provides two type of job types.

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Continuous Job:

New call activities are fetched and created in Salesforce soon after phone call is ended/disconnected. Interval is ~1 - 6 minutes depending of 'Advanced Call Details Retrieval Interval' in Tenant configuration.

One-Time Job:

One-time Job which can be used to fetch BeneCloud call details up to 7 days in past and create them in Salesforce. Uses Continuous Job settings.

Please see detailed configuration and help text in the configurator app.

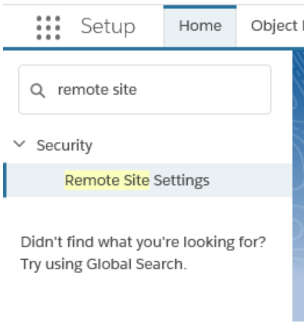
Do not link Cases/Task to Contact or Person Account

As default the Cases/Task created from Enterprise Calls are linked to Contacts or Person Accountsif a single record is found with the same phone number as in the Enterprise Calls data.

If Cases/Tasks created from Enterprise Calls are not wanted to be linked to Contacts/Person Accounts this can be chosen in the checkbox “Do not link Cases/Task to Contact or Person Account”.

1.5 Configure SF Remote site settings for BeneAPI Endpoint URL

d. As SF admin go to Setup -> quick search “Remote site settings”



e. In Remote Site Settings view -> New Remote Site

f. Add new site

Name: BeneVoice2 (this can be anything) *Remote Site URL:* < BeneAPI Endpoint URL visible in Tenant configuration> *Active checkbox: checked*

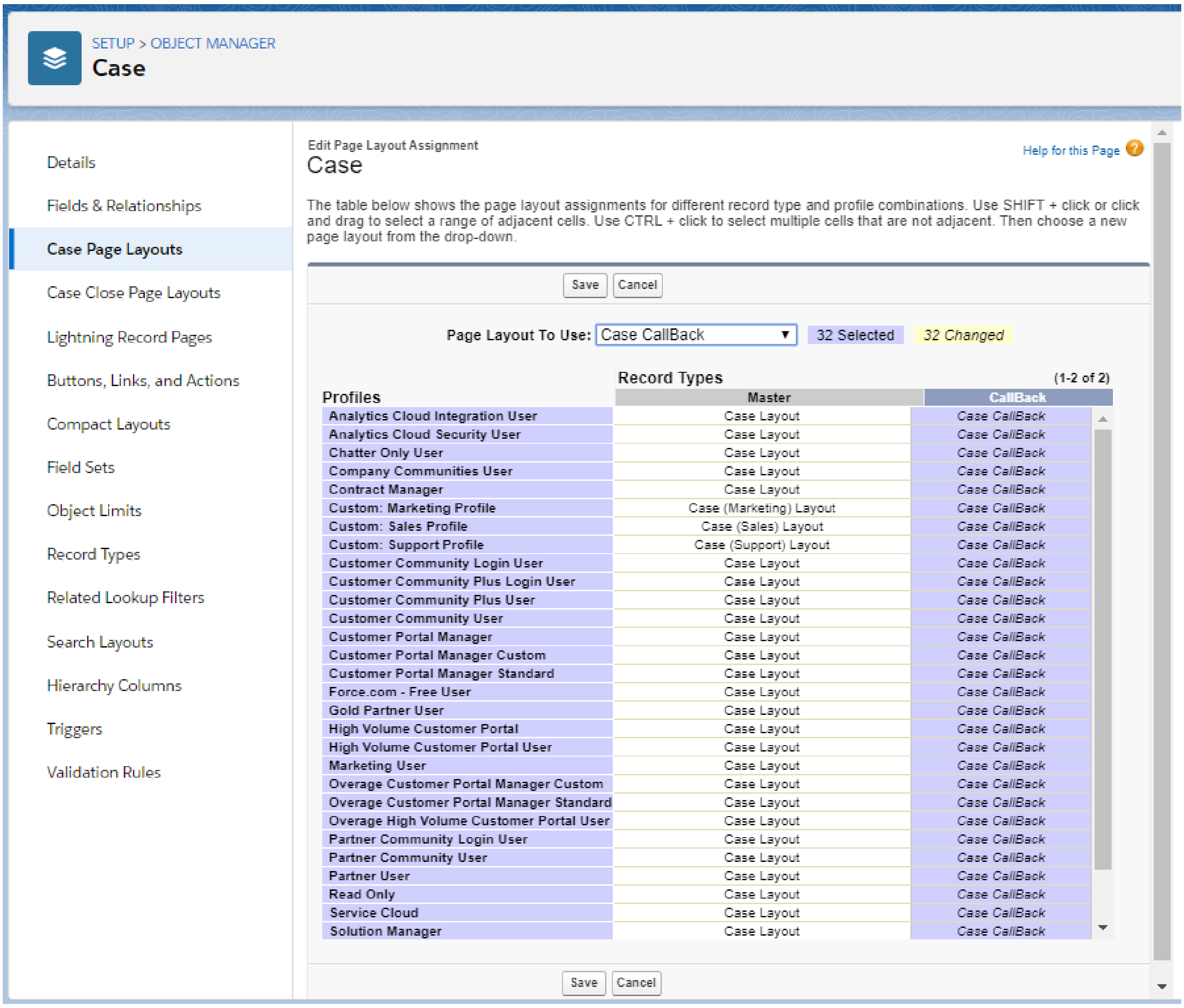
1.6 Configure integration Case and Task page layouts and assignments

Installation creates dedicated Case record type and page layout for CallBack case integration.
Installation creates dedicated Task record types and page layouts for Call and CallBack task integration.

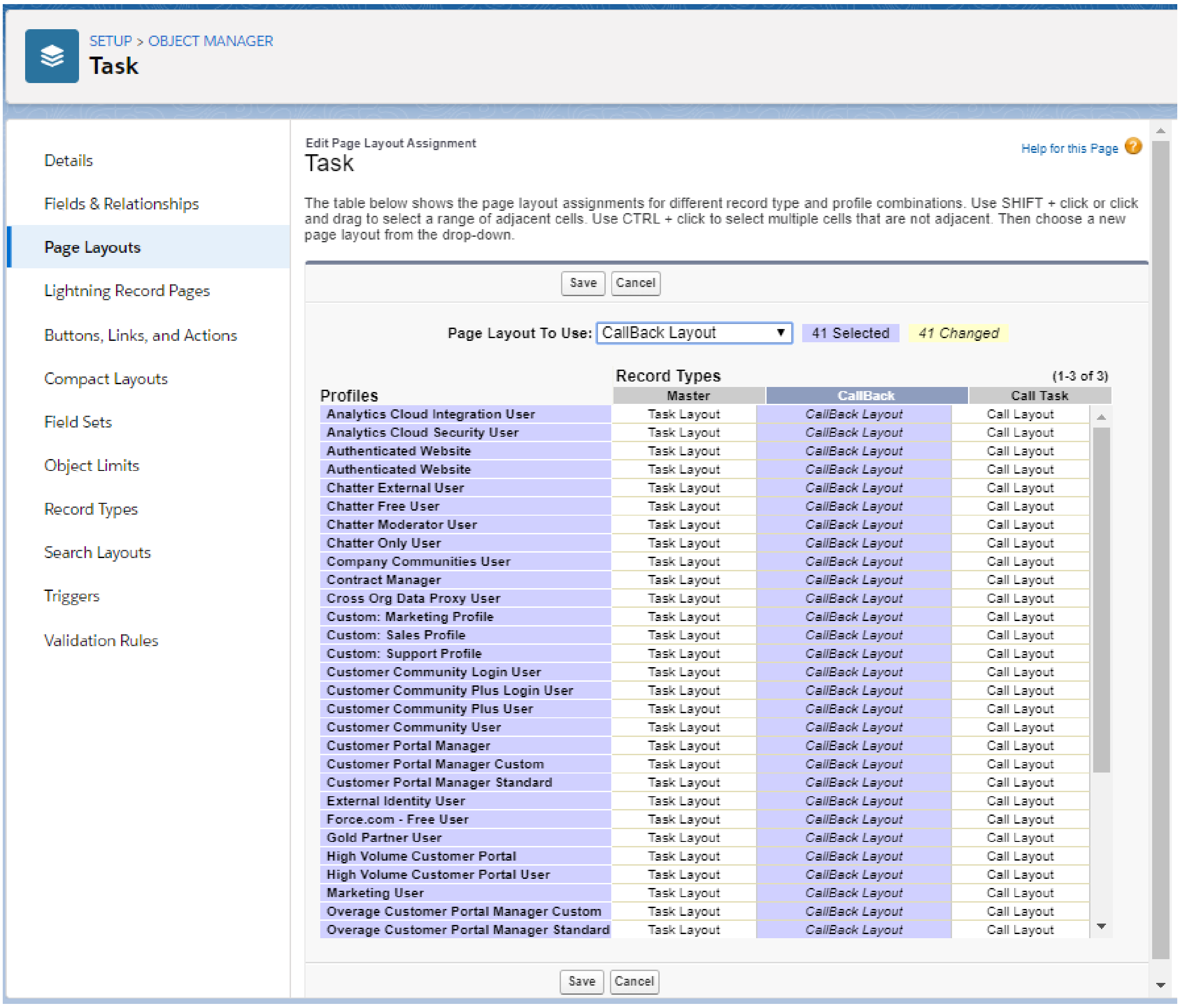
Please ensure page layout assignment(s) manually via Object Manager for the needed profiles.

Addtionally customer may freely modify page layouts with additional field and attributes. (please make sure that end users has needed read&edit rights for such attributes)

a. Go to Setup -> Object Manager
b. In Object Manager view -> Case -> Case Page Layouts
c. In Page Layouts click ‘Page Layout Assignment’ -> then ‘Edit Assignment’
d. Update Case CallBack layout for CallBack record type at least for all the relevant user profiles



e. Still in Object Manager go to Task -> Page Layouts -> Page Layout Assignment -> Edit Assignment
f. Update CallBack Layout for for CallBack record type at least for all the relevant user profiles
g. Note: Call Task record type should automatically have the correct Call Layout page layout assigned



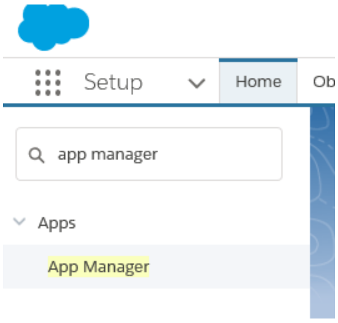
1.7 Activate BeneVoice in Lightning App(s)

BeneVoice integration is activated on Lightning App basis for end users by adding Benemen CallCenterComponentBeneVoice utility item for the needed end user Lightning Apps, typically Sales and/or Service Cloud console apps.

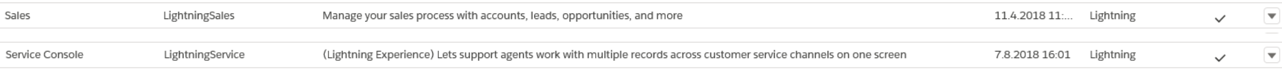
Note: If Omni-Channel is used in Lightning app where adding BeneVoice, you must ensure that all Omni-Channel users using this Lightning app are fully configured for BeneVoice.

Note: If CallCenterComponentBeneVoice is not visible in the available utility item list, please ensure that My Domain is fully activated in the Salesforce org. Note: sometimes there might be few hours delay these to become visible after managed package installation.

a. Go to Setup and Quick search 'App Manager'

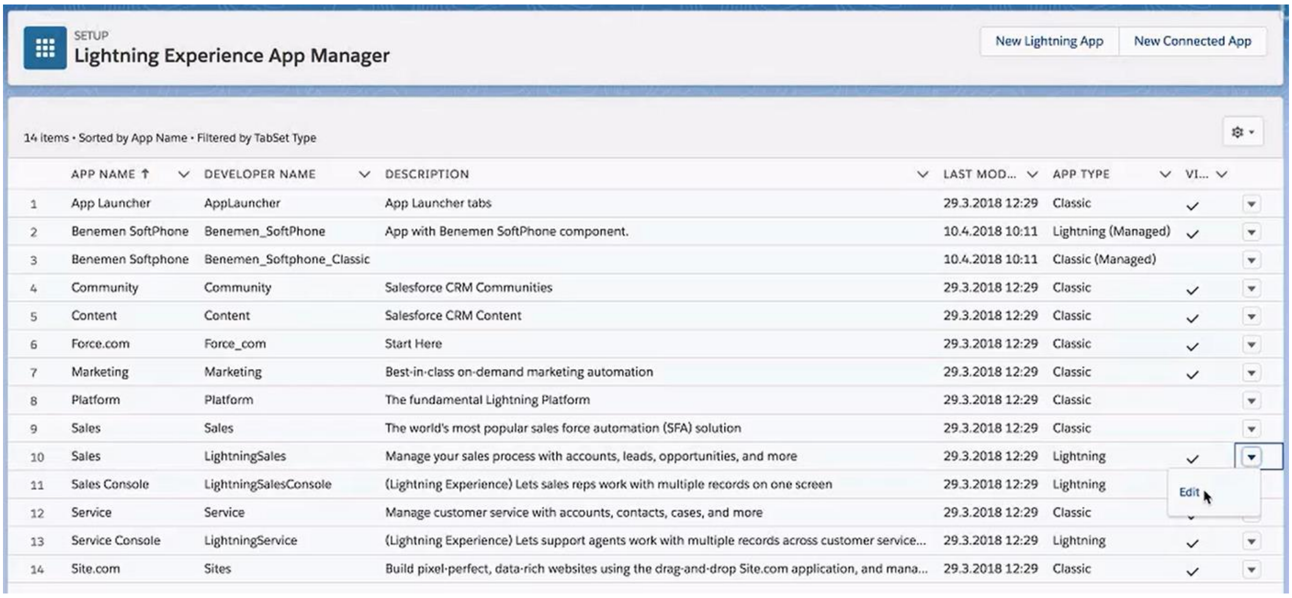


b. In App Manager you can add Benemen softphone utility item to wanted SF Lightning apps , typically “Sales - Lightning Sales” AND/OR “Service Console – LightningService”



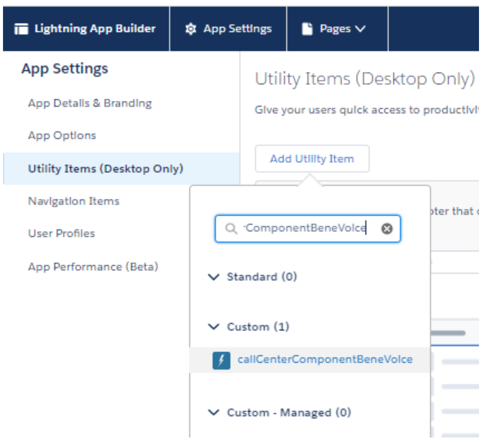
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	11.4.2018 11:...	Lightning
Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen	7.8.2018 16:01	Lightning

c. Edit selected App



	APP NAME	DEVELOPER NAME	DESCRIPTION	LAST MOD...	APP TYPE	VI...
1	App Launcher	AppLauncher	App Launcher tabs	29.3.2018 12:29	Classic	✓
2	Benemen SoftPhone	Benemen_SoftPhone	App with Benemen SoftPhone component.	10.4.2018 10:11	Lightning (Managed)	✓
3	Benemen Softphone	Benemen_Softphone_Classic		10.4.2018 10:11	Classic (Managed)	
4	Community	Community	Salesforce CRM Communities	29.3.2018 12:29	Classic	✓
5	Content	Content	Salesforce CRM Content	29.3.2018 12:29	Classic	✓
6	Force.com	Force_com	Start Here	29.3.2018 12:29	Classic	✓
7	Marketing	Marketing	Best-in-class on-demand marketing automation	29.3.2018 12:29	Classic	✓
8	Platform	Platform	The fundamental Lightning Platform	29.3.2018 12:29	Classic	
9	Sales	Sales	The world's most popular sales force automation (SFA) solution	29.3.2018 12:29	Classic	
10	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	29.3.2018 12:29	Lightning	✓
11	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	29.3.2018 12:29	Lightning	
12	Service	Service	Manage customer service with accounts, contacts, cases, and more	29.3.2018 12:29	Classic	✓
13	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service...	29.3.2018 12:29	Lightning	✓
14	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and mana...	29.3.2018 12:29	Classic	✓

d. Select Utility Items -> click Add -> Find and select *callCenterComponentBeneVoice* .
(note: if you are using BeneDesk for Windows softphone integration, then select *callCenterComponent*)



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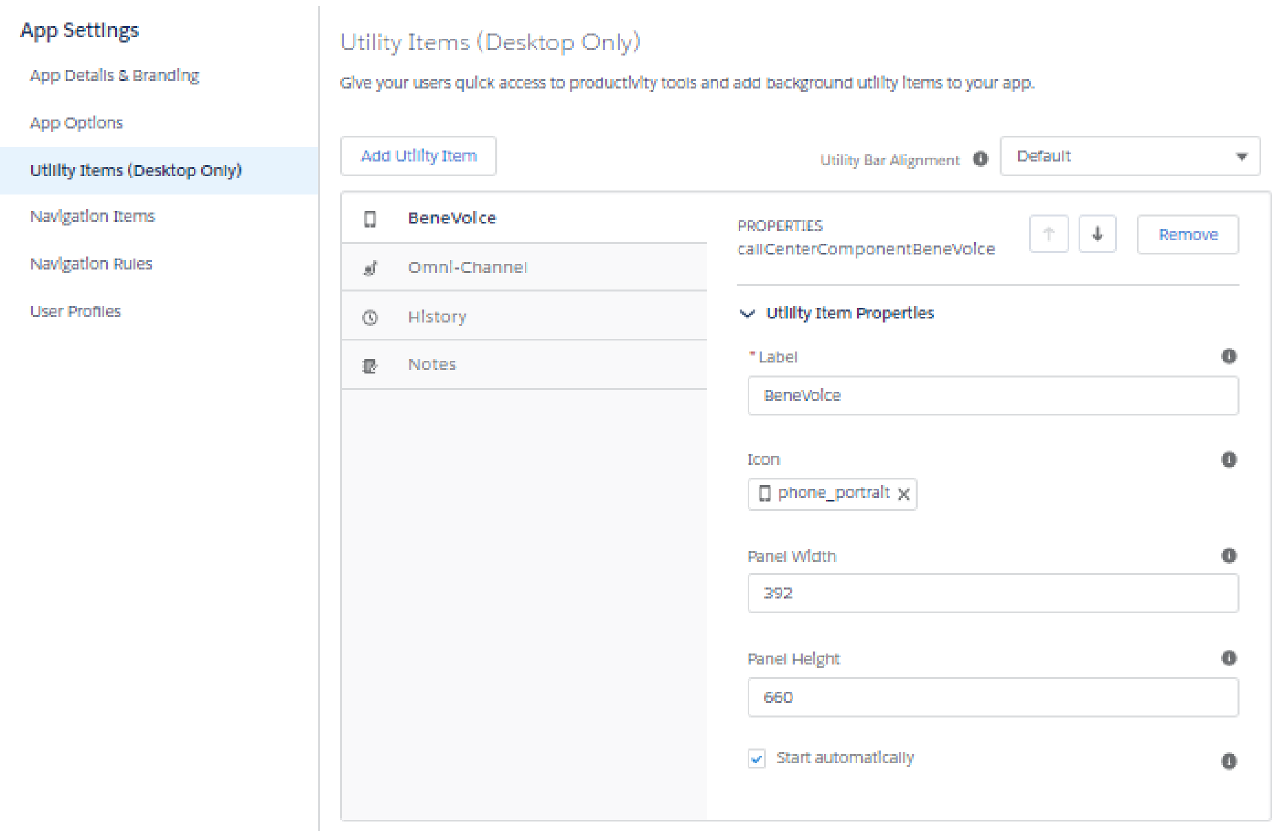
e. In callCenterComponentBeneVoice view

   a. name it (label) BeneVoice (can be anything you like)
   b. In Icon option, change it to 'phone_portrait'
   c. Panel Width 392 and Panel Height 660
   d. Verify that 'Start automatically' is checked to enable automatic login to the webphone
   e. Save the settings



f. You may need to wait a little while, but Softphone utility item will now appear in the Lightning app. (Note: please see User configuration for activating end users)

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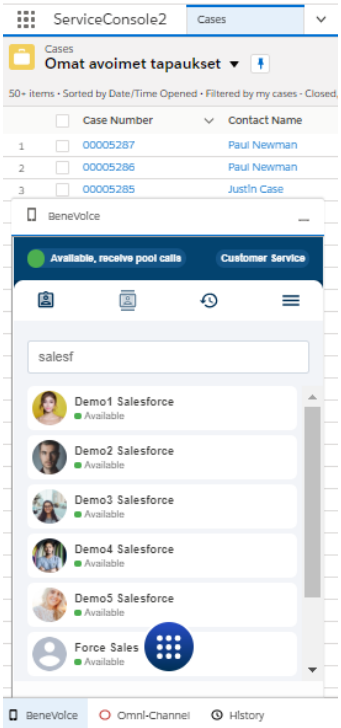


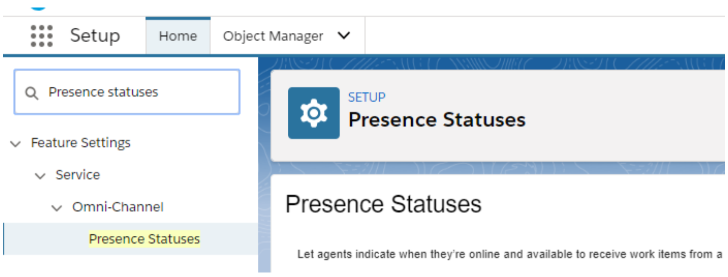
1.8 System Presence Statuses configuration

This configuration is valid only if Customer is using Salesforce Omni-Channel and BeneVoice Omni-Channel availability integration is used.

BeneVoice Omni-Channel availability integration requires the certain system statuses manually added in Omni-Channel Presence Statuses configuration and assign then to BeneVoice end users.

These will provide built-in "In a Call", "Wrap Up" and "In a Case" availability handling.

a. Go to Presence Statuses



b. Add the following three system presence statuses as described below. Note: Developer name MUST be exactly as described below. Status Name can be different.

Status Name: In a Call	Developer Name: In_a_Call	Status: Busy
Status Name: Wrap Up	Developer Name: Wrap_Up	Status: Busy
Status Name: In a Case	Developer Name: In_a_Case	Status: Online (add wanted channels)

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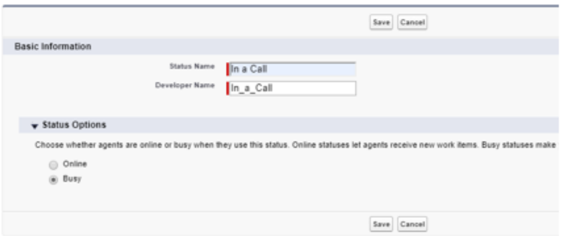
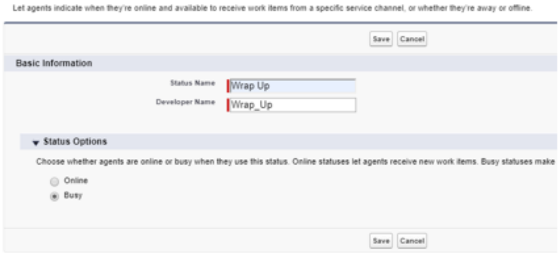
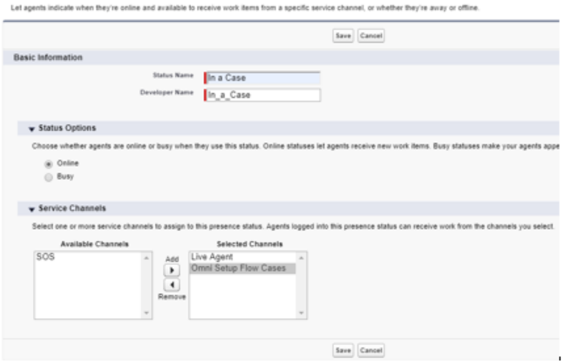
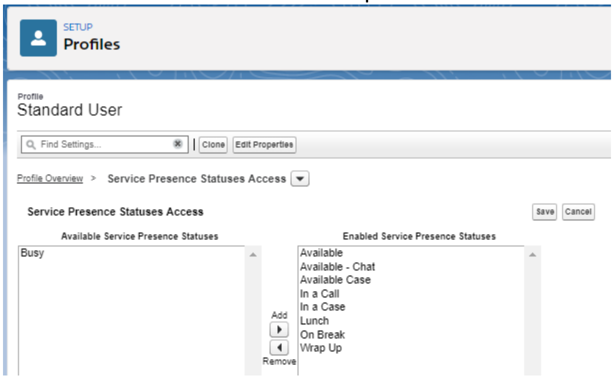






c. Presence statuses must be assigned to BeneVoice end users, although users can't themselves set these statuses. Use appropriate Permission Set or Profile to assign service presence statuses access. E.g. Profiles -> <selected user profile> -> Service Presence Statuses Access -> 'Edit' (please ensure first that Enhanced Profile User Interface is enabled via Setup -> Users -> User Management Settings)



2 End user configuration

This configuration shall be applied for every BeneVoice end user.

Please note that users need to have object level Read and Edit permissions for Case and Task objects granted by Profile or a separate permission set. The BeneVoice permission set grants the permissions only on field level.

2.1 BeneVoice license assignment

If **Site License** is used, this step is not used. All end users are automatically licensed.

If **User License** is used, BeneVoice end user license assignment is required via

- Installed Packages -> BeneVoice for Salesforce -> Manage licenses

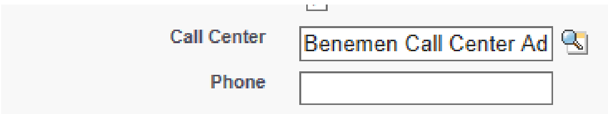

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall | Manage Licenses	BeneVoice for Salesforce	Benemen	1.37	BenemenPhone	Active	3	1	Does not Expire	14.5.2020 11:54		2	4	7	Passed

- Or, under specific User account settings-> Managed Packages -> Assign Licenses

2.2 Add Benemen Call Center Adapter to end users

a. Go to Setup -> Users
b. Select end user account -> Edit
c. Call Center: Benemen Call Center Adapter -> Save config

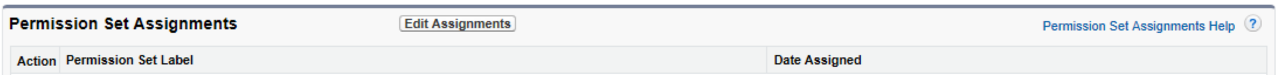


2.3 Permission set, add Benemen Softphone to end users

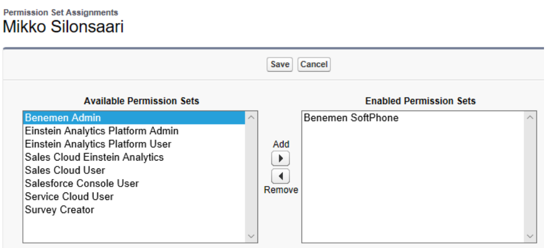
Add Benemen SoftPhone permission set to end users.

Via specific end user settings

a. Go to Setup -> Users
b. Select specific end user account
c. In end user settings, browse down to Permission Set Assignments -> click Edit Assignments



d. Add Benemen SoftPhone and Save

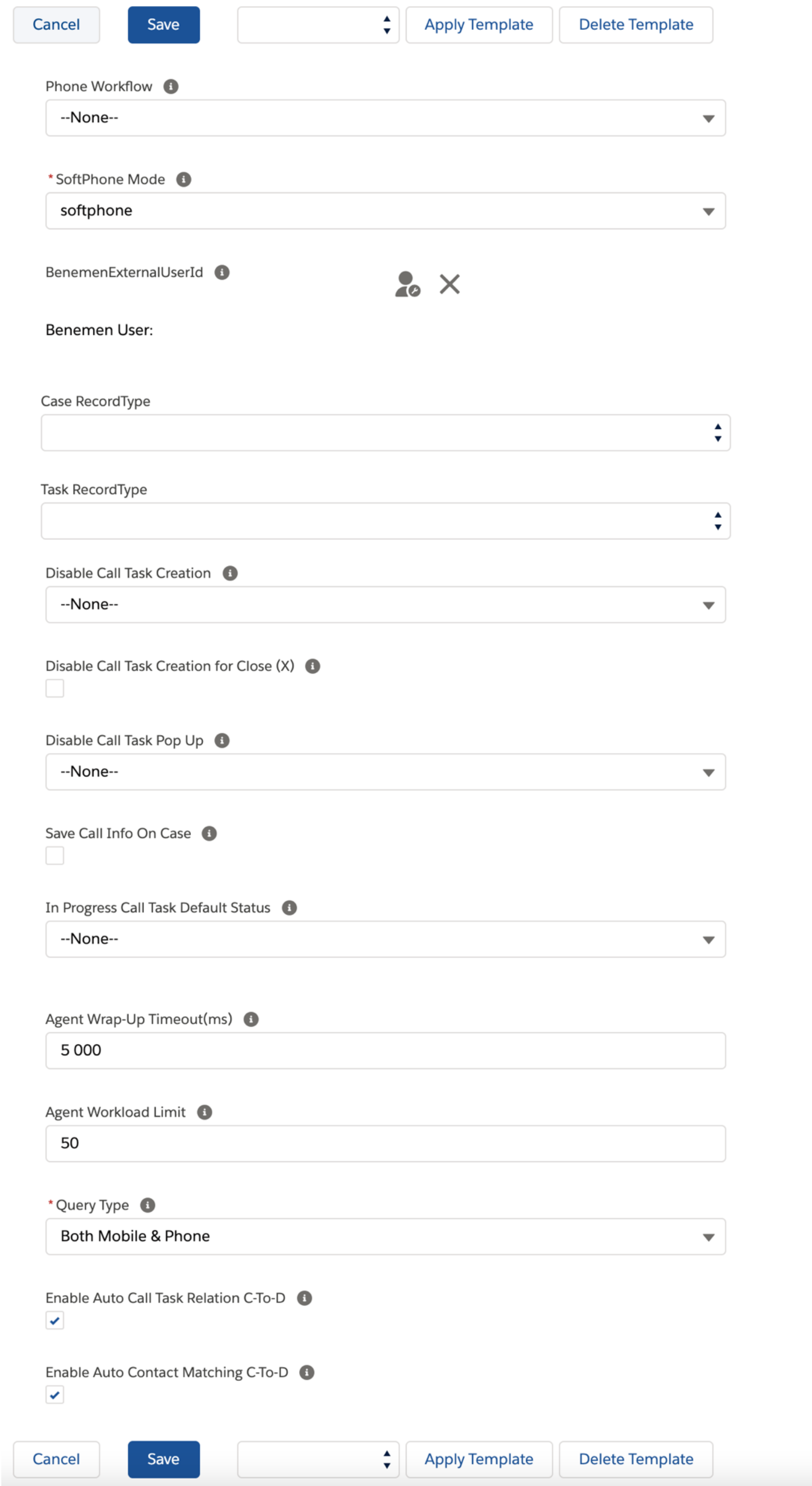


Bulk assignment via Permission Sets view

a. Go to Setup -> Permission Sets
b. Click Benemen SoftPhone -> Manage Assignments
c. Click Add Assignments -> check end users you want to enable -> click Assign

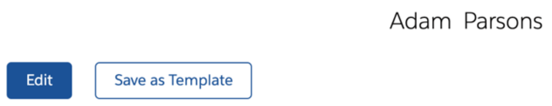
2.4 BeneVoice – Users Configurator

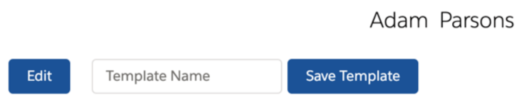
a. Go to BeneVoice app -> Benemen Configuration -> Users
b. 'Refresh Agent List' fetches all the end users added to 'Benemen Softphone' Permission Set.
c. Configure wanted end user settings on user basis.


Cancel
Save
Apply Template
Delete Template
Phone Workflow
--None--
* SoftPhone Mode
softphone
BenemenExternalUserId
Benemen User:
Case RecordType
Task RecordType
Disable Call Task Creation
--None--
Disable Call Task Creation for Close (X)
Disable Call Task Pop Up
--None--
Save Call Info On Case
In Progress Call Task Default Status
--None--
Agent Wrap-Up Timeout(ms)
5 000
Agent Workload Limit
50
* Query Type
Both Mobile & Phone
Enable Auto Call Task Relation C-To-D
Enable Auto Contact Matching C-To-D
Cancel
Save
Apply Template
Delete Template

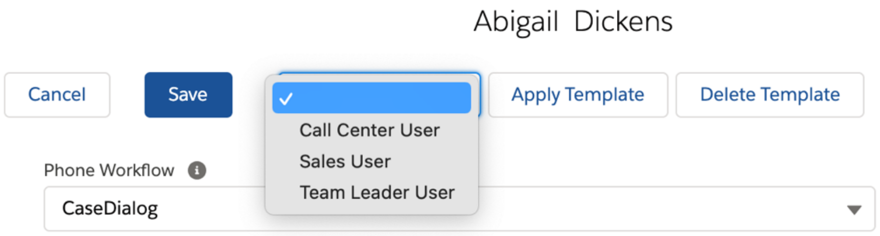
Using the Templates

- Once you have completed the user configuration for the first user, you can save the configuration as a template to be applied to other users by clicking “Save as Template, then give a name for the Template (Use a name that describes the user role, for example: Call Center User) and Save Template.





- When configuring the next user, you can see the saved templates and Apply the Template.



Phone Workflow

Four different workflow options. One must be selected.

- Case: Automated case creation without contact dialog. Targeted for quick case creation. Requires console navigation type of Lightning app for popping up chosen / new cases.
- CaseDialog: New & Existing Case handling with contact dialog. Targeted for contact identification and case handling. Requires console navigation type of Lightning app for popping up chosen / new cases.
- Contact&Account: Contact & Account identification and screen pop-up.
- Contact&Lead: Contact identification. New Lead handling for not identified contacts.

Important notes: Case and CaseDialog involves automated Case creation. Please see **additional tenant level configuration** .

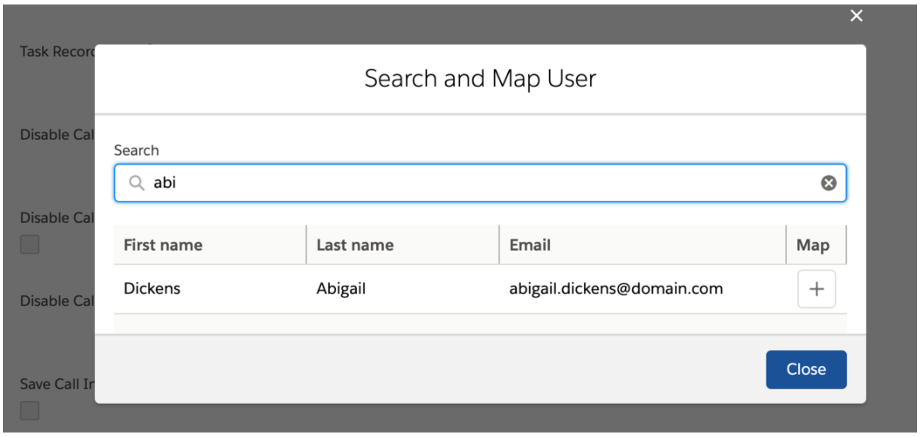
Softphone Mode

lync: if Benemen integrated Lync / Skype for Business is used as softphone (legacy, for special use case)
softphone: if BeneVoice Web phone / BeneDesk for Windows is used as softphone (default)

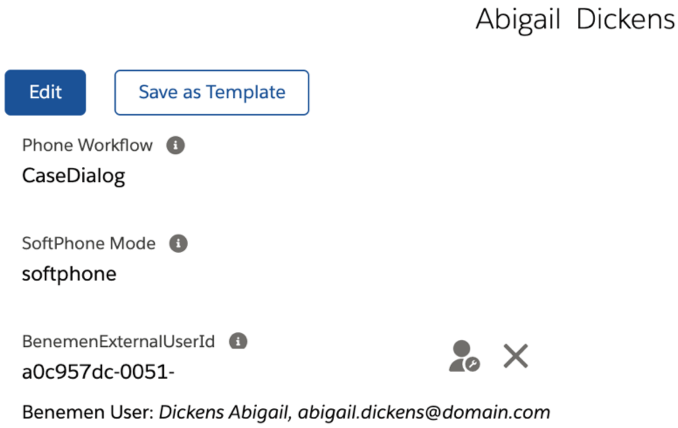
BenemenExternalUserId

BenemenExternalUser ID maps the Salesforce User to the Benemen User. When the User configuration is created by adding the Permission Set, the Benemen user is automatically searched with the Salesforce User Email. If there is a match the mapping is done automatically.

If there is no Benemen User found with the Salesforce User email, then the mapping needs to be done manually by clicking the icon. Search and Map User window will pop-up. You can search for the Benemen Users with email or name.

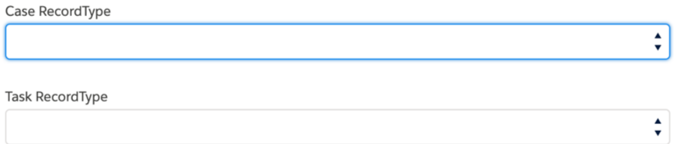


Click the icon to map the user.



Case and Task RecordType

Select the Default Record Type for Cases and Tasks created from Users calls. Blank uses the Users default Record Type



Disable Call Task Creation

By default Call Task Activities are created for all type of calls.
Use provided options to disable call task activity creation.

- Not Identified Incoming Not Answered Calls
- Incoming Not answered Calls
- All Not Answered Calls
- All Calls

Disable Call Task Creation For Close (X)

Depending of the selected Phone Workflow, screen pop-up dialog includes Close (X) buttons to close workflow without any further action.
Selecting this option will also disable Call Task Activity creation for the given call.

Disable Call Task Pop Up

By default Call Task Activity screen pop-up will be displayed after each call for further editing (both answered and not answered calls)
Use provided options to disable call task activity pop-up being displayed.

- Not Answered Calls
- Incoming Calls
- Not Answered And Incoming Calls
- All Calls

Save Call Info On Case

Using Call Task Activities is recommended method and activities are automatically related to the worked Case. However selecting this option will save call info in the worked Case object (and not in Call Task Activity). This option works with the both Case and CaseDialog phone workflows.

Important notes:
If selecting this option, please remember to add wanted call detail fields to the used Case layout via Object Manager.
Relevant call info fields: CallEndTime, Call Duration, Call Result, Phone Number 2, Call Type, Service Pool Queue, Queue Wait Time, Queue Wait Time Sec, Recording.
If selecting this option all other Call Task Activity settings are not in use.

In Progress Call Task Default Status

By default all the Call Task Activities are saved with Completed status.
Use provided options to save call task activities by default with In Progress status.

- Not Answered Calls
- Not Identified Calls
- Not Answered and Not Identified Calls

Agent Wrap-Up Timeout(ms)

This is used only with Omni-Channel Availability integration. Otherwise leave empty.
Wrap Up time in milliseconds after ending answered call.
During Wrap Up availability status, user will remain as Busy in Omni-Channel and will not be allocated any new work items or calls.
Value here will be used over Tenant level configuration.

Agent Workload Limit

This is used only with Omni-Channel Availability integration. Otherwise leave empty.
Numeric Agent workload value.
If Agent's omni-channel workload is the same or higher than the configured numeric value, Agent's omni-channel status is changed to "In a Case" and Agent is set to offwork status in Benemen Voice service channel. Agent will remain online in the omni-Channel, but will not be allocated service calls until the workload value goes lower than the configured numeric value.

Value here will be used over Tenant level configuration.

Query Type

For caller identification ‘Phone’ and ‘Mobile’ fields can be queried.
Select query type from available options:

- Both Mobile & Phone
- Phone Only
- Mobile Only

Enable Auto Call Task Relation C-To-D

This is optional setting. By default outbound click-to-dial call task activities are not automatically related to the object where click-to-dial was initiated from. Also possible contact / account matching is done only by phone number.
When this setting is enabled, call task activity is automatically related to the object, where click-to-dial was initiated from.
Note: This setting is also available on the Tenant configuration. If User level setting is enabled, this overwrites tenant level setting.
Note: Pre-requisite for this to work is that the object is by design or by admin enabled for ‘Track Activities’. Exceptions are Contact object where identification is done independently and Task object, where only contact matching is applied.

Enable Auto Contact Matching C-To-D

This is optional setting.
Note: This setting requires that ‘Enable automated call task object relation for click-to-dial’ is first enabled.
If the object, where click-to-dial was done, includes relation to single contact record, this contact is automatically matched in the created call task activity.
Note: This setting is also available on the Tenant configuration. If User level setting is enabled, this overwrites tenant level setting.

2.5 Permission set, add Benemen Admin for required admins and users

You may add ‘Benemen Admin’ permission set for possible users who needs to be able to access BeneVoice configurator app.

2.6 Permissions for Custom Fields on Activity Object

The package includes a number for custom fields on the Activity object that are added to the page layouts included (Call Layout and CallBack Layout). Custom fields include for example the Queue Wait Time, Call Type, Links to the Recording etc. The permissions for these fields are included in the Permission Sets (Benemen Softphone and Benemen Admin). If users that do not have these Permission Sets need to access the custom fields, the permissions need to be configured separately either by adding the fields to the relevant profiles or creating a permission set with the fields and assigning this to the relevant users.

3 Additional information and configuration options

3.1 Optional: Modify BeneVoice Task and Case layouts

Salesforce Admin can freely modify BeneVoice created Call / CallBack Task and Case layouts, e.g. adding own custom fields etc.

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3.2 Phone number matching logic

- Contact phone number is queried against 'Phone and/or Mobile' fields in Contacts & Accounts. This is set on user level in Users configuration
- Tenant level configuration includes two options how matching is done
    - Standard fields: Use for the best performance. Direct search to standard Phone and MobilePhone fields. To match, Phone numbers must be stored in exact E.164 format (e.g. +358401234567).
    - Formula fields: Phone numbers can be stored in non-E.164 format. Search through special formula fields. Search performance may decrease if used against large contact&account databases.

3.3 Error logs

Installation creates and activates the following Workflow Rule to collect and send BeneVoice application level error messages.

New Rule

Action	Rule Name ↑	Description	Object	Active
Edit | Deactivate	SendEmailAlertOnLogCreate		Log	✓

Workflow Actions -> Email Alerts are used to control actual email sending process and recipients.
The following Email Alert is configured by the package and by default error messages are emailed to salesforcelogs@benemen.com email address.

Customer may freely modify and add own recipients here, but we recommend keeping Benemen email address in the configuration.

New Email Alert

Action	Description ↑	Email Template Name	Object	Last Modified Date
Edit	Send Email On Log Create	Error Log Template	Log	13.9.2019

4 Known issues and workarounds

4.1 BeneVoice webphone / Softphone utility item is empty in the lightning app

This is normally caused if end user isn't properly activated for the BeneVoice for Salesforce. Please ensue the correct end user configuration.

However this can also happen is also the below two options are also enabled in Setup > Security > Session Settings -> Clickjack Protection

There are two workarounds:

- Disable the options
- Keep the options enabled and add the following to the Whitelisted Domains

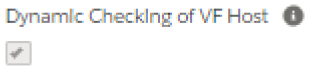
https://<my domain>.my.salesforce.com
https://<my domain>.lightning.force.com

4.2 Click-to-Call is not working / disabled

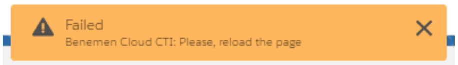
Workaround 1:

If click-to-call doesn't initiate outbound call and is disabled, please check the following workaround. This can be caused that VF Host on the background has been changed/modified.

1. As Admin users go to BeneVoice app -> Benemen Configuration -> Tenant
2. Ensure that Dynamic Checking of VF Host is enabled



3. Still as Admin user go to Lightning app where Benemen Softphone utility item is added
4. Admin should now see the below notification



5. Refresh page (CTRL + F5) shall fix the issue as vf host gets verified on the background

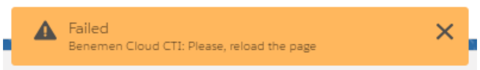
Workaround 2:

If Workaround 1 didn't work then complete the following steps to resolve the issue.

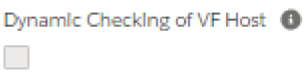
1. Go to to Setup -> Visualforce Pages
2. Find and click Softphone and go to Preview
3. On Preview browser page copy the whole URL to clipboard (e.g. https://<customer org>.benemenphone.eu19.visual.force.com/apex/SoftPhone#/
4. Go to Setup -> Call Centers –> Benemen Call Center Adapter -> Edit
5. Replace text in "CTI Adapter URL" by the copied URL
6. Remove last two characters "#/" (e.g https://<customer org>.benemenphone.eu19.visual.force.com/apex/SoftPhone)
7. Save settings
8. Test again that click-to-call is now active and works

4.3 Failed – BeneVoice notification keeps appearing

The below notification keeps appearing for end users although click-to-call and other integration functionality works as expected.



To fix the issue, Admin can safely disable "Dynamic Checking of VF Host" option via BeneVoice app -> Benemen Configuration -> Tenant



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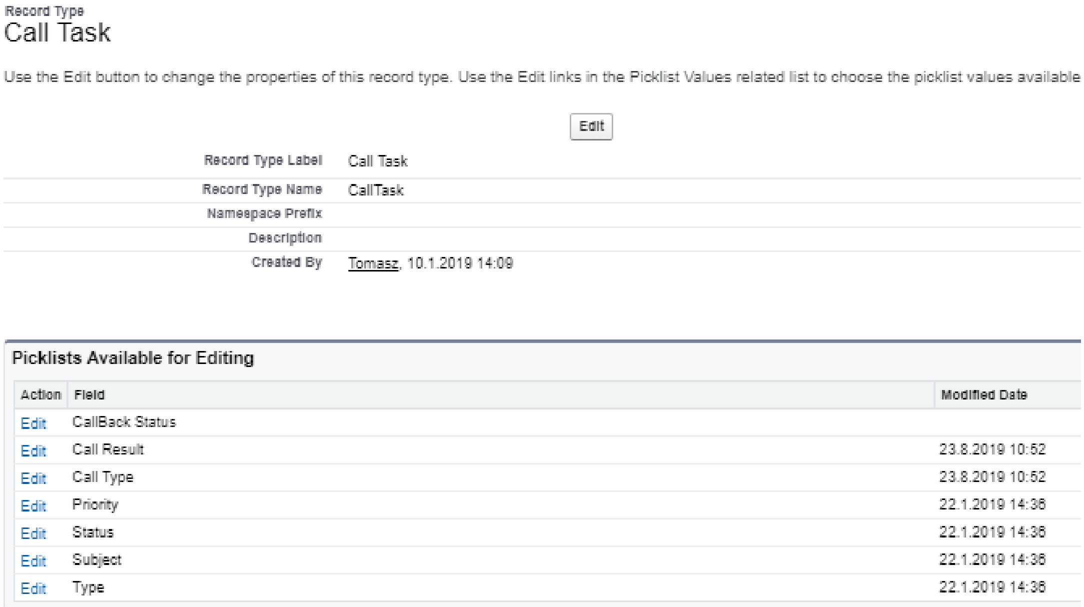
4.4 Workflow is not creating / opening Case or Task objects

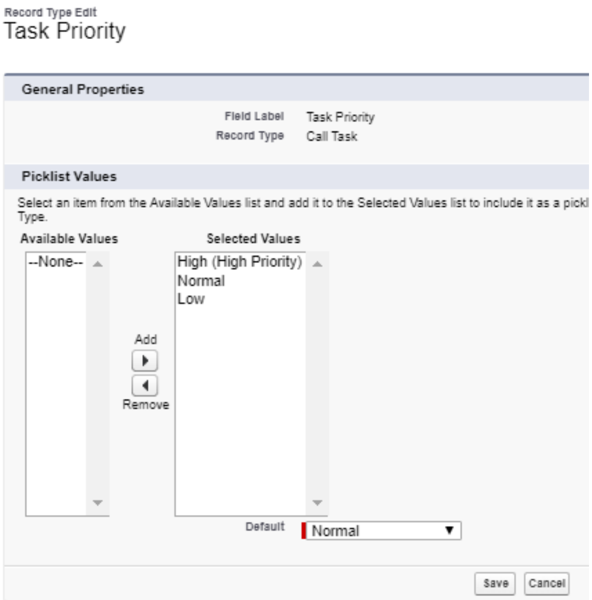
Customer may have some tenant level configuration for required Case / Task fields and default values. This may cause BeneVoice created Case and Task objects not to have these required fields fully configured and default values set, so that automated creation could work on the background.

Normally this can be fixed manual configuration directly on BeneVoice created Case and Task record types.
Case record type: CallBack
Task record type: Call Task
Task record type: CallBack

1. Go to Setup -> Object Manager
2. Browse and selected wanted Case / Task record type
3. Click Edit on wanted field on "Picklists Available for Editing" section



4. Make sure that wanted values are under "Selected Values" and pick one of these as Default



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5. Save
6. Repeat the procedure for other possible fields

4.5 Click-to-dial from Case: Task is created but the Contact relation is left empty

This can be caused if there are several lookup fields from Case object to the Contact. Currently the creating of the relation from Task to the Contact only works if there is only the standard Case-Contact relation.

Additional info:
Chrome browser Developer Tools (F12) -> Console can help with initial troubleshooting to finding problematic fields.
Reproduce the issue in Chrome while Developer Tools -> Console is visible.
You should see possible error messages on red indicating field names with possible access / creation issues.