



BENEVOICE FOR SALESFORCE Configuration guide

Version 1.45.3



Contents

1	Sales	sforce tenant level configuration	4
	1.1	Installation Prerequisites	4
	1.2	Install BeneVoice for Salesforce package to Salesforce tenant	4
	1.3	Configure Remote Site Settings for Benemen Discovery URL	5
	1.4	BeneVoice Configurator	5
	1.4.1	Tenant Configuration	5
	1.4.2	2 Users Configuration	8
	1.4.3	B Search & Info fields	9
	1.4.4	Presence Statuses Configuration	11
	1.4.5	Blacklist Configuration	12
	1.4.6	6 CallBack Configuration	13
	1.4.7	7 Smart Routing	15
	1.4.8	B Enterprise Calls	16
	1.5	Configure SF Remote site settings for BeneAPI Endpoint URL	17
	1.6	Configure integration Case and Task page layouts and assignments	17
	1.7	Activate BeneVoice in Lightning App(s)	19
	1.8	System Presence Statuses configuration	22
2	End	user configuration	23
	2.1	BeneVoice license assignment	23
	2.2	Add Benemen Call Center Adapter to end users	24
	2.3	Permission set, add Benemen Softphone to end users	24
	2.4	BeneVoice – Users Configurator	24
	2.5	Permission set, add Benemen Admin for required admins and users	29
	2.6	Permissions for Custom Fields on Activity Object	29
3	Addi	tional information and configuration options	29
	3.1	Optional: Modify BeneVoice Task and Case layouts	29
	3.2	Phone number matching logic	
	3.3	Error logs	
4	Knov	vn issues and workarounds	
	4.1	BeneVoice webphone / Softphone utility item is empty in the lightning app	
	4.2	Click-to-Call is not working / disabled	
	4.3	Failed – BeneVoice notification keeps appearing	



Configuration guide

4.4	Workflow is not creating / opening Case or Task objects	.32
4.5	Click-to-dial from Case: Task is created but the Contact relation is left empty	.33



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

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; <u>https://help.salesforce.com/articleView?id=omnichannel_enable.htm&type=5</u>

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

Install BeneVo	pice for Salesforce	
Install for Admins Only	Install for All Users	Install for Specific Profiles
		Install Cancel
App Name Publishe	r Version Name	Version Number
BeneVoice for Salesforce Benemer	1.37	1.37
Additional Details View Component	ts	

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

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



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.

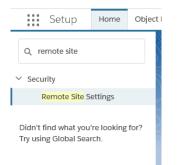
d. Add Admin user used for the configuration steps to "Benemen Admin" and "Benemen SoftPhone" Permission sets

Save Cancel	
Enabled Permission Sets	
Benemen Admin Admin Benemen SoftPhone	

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

App Lau	ncher		Q BeneVolce	8
✓ All App:	5			
BENE VOICE	BeneVoice App to configure BeneVolce for your Salesforce Org	**		

- 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



Configuration guide

	benemer
Configuration Name Benemen	Benemen Discovery URL
Dynamic Checking of VF Host	BeneAPI Endpoint URL
Visualforce Host URL	BeneDesk URL
Benemen System User Name	BeneAPI Authorization Token
	Enter The New Authorization Token
Advanced Cali Detalls	Default Agent Workload Limit D
Search type for Accounts and Contacts Standard Fields	Default Agent WrapUp Timeout
Enable automated call task object relation for click-to-dial	

- 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: <u>https://customerorg--benemenphone.visualforce.com</u> Paste copied URL to Visualforce Host URL field



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 <u>End user configuration</u> 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 account 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	×	V
Case Origin	2	Ø
Contact Name	V	×.

- 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
Case field API name or related object with case relation API name (dot notation) Fleld API name
Subject
Related object API name

Justin Case BenemenDemo Director justin.case@benemen.com Platinum

Five recent cases are displayed, search	for more nobile Q	Choose	
00003329 BenemenDemo Ca	oject D0003273 Low Phone Subject: Mobile application inquiry IBack - 28 O0001960 Medium Phone Subject: Mobile application inquiry IBack - 27	e Origin Booking Number one	Choose Choose



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

Additional Search strings: ()	
Contact field API name or related object with contact relation API name (dot notation) (Field API name	•
Name	
Related object API name	
Bookingc.Contactc	
Call Disposition - +3584578818164	
Image: Second	
	Close

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

Addition Fleld API	al Case colu name	mns							
Priority	;Origin;Boc	kingr.Name							
		Justin Case Bene	menDemo Di	rector justin.cas	e@benemer	.com F	latinum		
Five recent case	es are displayed, se	arch for more C Search					Q Choo		
Case Number	Account Name	Subject	Created Date	Last Modified Date	Name Status	Priority	Case Origin	Booking Number	
00003329	BenemenDemo	CallBack - 28.08.2019 11:27	28.8.2019 11:27	28.8.2019 11:27	Mikko New	Medium	Phone		Choose
0003328	BenemenDemo	CallBack - 27.08.2019 15:06	27.8.2019 15:06	28.8.2019 8:08	Mikko Closed	Medium	Phone		Choose
0002164	BenemenDemo	Problem with delivery	15.5.2019 15:57	28.8.2019 8:07	Lisa C Escalated	High	Email		Choose
0002271	BenemenDemo	Booking inquiry	16.5.2019 15:05	28.8.2019 8:06	Pekka Closed	High	Phone	0123457	Choose
0002358	BenemenDemo	Renewal #229944	20.5.2019 13:51	28.8.2019 8:06	Pekka Working	High	Phone		Choose
New Case									
									Close

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

Additional Contact columns Fleld API name Title;Email;Account.SLA__c



Configuration guide

Call Disposition - +3584578818164			
😰 ma 🛛 Q	Update phone		l
Daul Newman United Oli & Gas, UK paul.newman@company.com Platinum			
Baija Maliikas BenemenDemo Sales Director malja.mallikas@benemen.com Platinum			

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"

Tenant	Users	BlackIIst	Presence Statuses Configuration
Presenc	e Statuse:	s mapping c	onfigurations don't exist
Creat	te new ma	appings 6)

- 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

benemen

BENEVOICE FOR SALESFORCE

Configuration guide

ent Users Search & Info fields	Bracklig	Presence Statuses Configuration	Callback Smart Routing		
Omni Presense Status 🕲		BeneCloud Presense Status Ø	BeneCloud Presense Status Type O		To be deleted
wailable, Online	٠	Available	Avallable	;	
wailable - Chat, Online	•	Ohat Only	OffWork	:	
unch, Busy	•	Lunch	OffWork	:	
On Break, Busy	٠	On Break	OffWork	:	
wailable - Phone, Busy	•	Available	Available	:	
luny, Buny	•	Buty	OffWork	:	

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 <u>System Presence Statuses configuration</u> 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.



Configuration guide

BENE VOICE	All 💌 C	Search Salesforce			**	2 ?	\$ 🖡 🐻
BeneVoice	Benemen Configuration	·	South States	100.111 200.0	111-17 Scouts - 100-2	111 - 2000	/
Tenant Users Searc	ch & Info fields Blackilst	Presence Statuses Configuration	CallBack	Smart Routing	Enterprise Calls		
							benemen
Blackilsted Task E	Enabled 0						
Mode							
CSV Range							
*Number							
Blackilst							
Blackilsted		~					

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.

BENE VOICE	All 🔻	Q. Search Salesforce			* •	0	?‡	. 🗟
BeneVoice	Benemen Configura	lon	CANNEL MELL	100.001		2111-22		1
Tenant Users Sear	ch & Info fields Blaci	dist Presence Statuses Configuration	CallBack	Smart Routing	Enterprise Calls		85NW117	1100000000
Create new configura CALL BACK CONFI Benemen default							ben	emen

- 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?



	CallBack Flow
-	Task
	Task
	Task related to Case
	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.

¢

Hours	\$
Hours	
Days	

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.

CallbackEN	
CallbackEN	
CallbackSE	
Callback	

Salesforce RecordType
CallBack

7. Salesforce Queue Name lists all the available Salesforce queues.

Select here the Salesforce Queue you would like to assign callback Cases or Tasks.

Salesforce Queue Name				
Internati	ional - Escalations	\$		

- 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

\$



Configuration guide

BeneVoice Benemen Configuration		/
Tenant Users Search & Info fields Blacklist Presence Statuses	Zesti Grazza za	IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
Create new configuration	Callback English	benemen
CALL BACK CONFIGURATION NAME Callback Finnish	Benemen CallBack Configuration Name Callback English	
Callback English	CallBack Flow D Case	
	CallBack Age Time Unit 🕐 Days	
	CallBack Ago 🕐 1	
	BeneCloud CallBack List Name 🕐	
	Salesforce RecordType CallBack	
	Salesforce Queue Name 🔹	
	Edit Delete Start Stop	

- 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
 - o CallBack ChannelIn , name of voice queue customer left callback request
 - o CallBack CreationTime , original date & time customer left callback request
 - o CallBack ContactNumber , phone number to call back to customer
 - \circ $\,$ 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

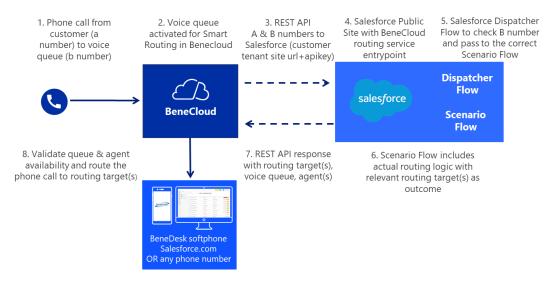
Flow Label 🕈 🛛 🗸	Process Type 🛛 🗸	A ∨	Te ∨	Package State 🗸 🗸	Package Name 🗸 🗸	Last Modifi 🗸	Last Modifie 🗸
SmartRoutIng_DIspatcher_Templ	Autolaunched Flow	1	-	Managed-Installed	Benemen Cloud CTI	Mikko Silonsaari	27.11.2019 14:50 💌
SmartRouting_Scenario_Template	Autolaunched Flow	~	~	Managed-Installed	Benemen Cloud CTI	Mikko Silonsaari	27.11.2019 14:49 💌

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



Configuration guide

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.

BENE VOICE	All 🔻 Q. Search 🖈 🖬 ? 🌣 🐥 🧒
BeneVoice Benemen Con	figuration
Tenant Users Search & Info fields	Blacklist Presence Statuses Configuration CallBack Smart Routing Enterprise Calls
Enterprise Calls are call details from calls t calls, BeneVoice for Teams calls etc.	andled in BeneCloud with other devices than BeneVoice for Salesforce. The data can include call details from direct mobile calls, service
JOB TYPES ()	
Continous Job	Enterprise Call process is disabled
One-Time Job 👔	
	Enterprise Call Record Object 🕚
	Salesforce RecordType 0 Call Task
	Enterprise Call Job for Direct Calls
	Enterprise Call Record Owner D
	Enterprise Call Record Default Status 🔹
	Enterprise Call Job Direct Calls Call Result Value 0 Both
	Create Record if Multiple Matches
	Multiple Matches Default Status
	Edit Start job Stop Job

The module provides two type of job types.





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.

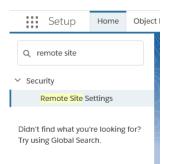
Do not link Cases/Task to Contact or Person Account

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.



Additionally 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

#16H255 >>#6 9 V	(0)#4162555 <i>216</i> 9 Y 0:#61627	155 M. 9 YO MARCHES (ZIG 9 Y WILLIGT 5
Details	Edit Page Layout Assignment		Help for this Page
ields & Relationships	The table below shows the page layout assignm and drag to select a range of adjacent cells. Use		
ase Page Layouts	page layout from the drop-down.		
ase Close Page Layouts	Save	Cancel	
ghtning Record Pages	Page Layout To Use: Ca	ase CallBack 32 Selected	32 Changed
uttons, Links, and Actions		Record Types	(1-2 of 2)
	Profiles	Master	CallBack
ompact Layouts	Analytics Cloud Integration User	Case Layout	Case CallBack 🔺
ompact Layouts	Analytics Cloud Security User	Case Layout	Case CallBack
115.	Chatter Only User	Case Layout	Case CallBack
ield Sets	Company Communities User	Case Layout	Case CallBack
Delect Limite	Contract Manager	Case Layout	Case CallBack
Dbject Limits	Custom: Marketing Profile	Case (Marketing) Layout	Case CallBack
	Custom: Sales Profile	Case (Sales) Layout	Case CallBack
ecord Types	Custom: Support Profile	Case (Support) Layout	Case CallBack
	Customer Community Login User	Case Layout	Case CallBack
elated Lookup Filters	Customer Community Plus Login User	Case Layout	Case CallBack
elated Lookup Filters	Customer Community Plus User	Case Layout	Case CallBack Case CallBack
	Customer Community User Customer Portal Manager	Case Layout Case Layout	Case CallBack
earch Layouts	Customer Portal Manager Customer Portal Manager Custom	Case Layout Case Layout	Case CallBack
	Customer Portal Manager Standard	Case Layout	Case CallBack
ierarchy Columns	Force.com - Free User	Case Layout	Case CallBack
	Gold Partner User	Case Layout	Case CallBack
iggers	High Volume Customer Portal	Case Layout	Case CallBack
.992.13	High Volume Customer Portal User	Case Layout	Case CallBack
alidation Rules	Marketing User	Case Layout	Case CallBack
alidation Rules	Overage Customer Portal Manager Custom	Case Layout	Case CallBack
	Overage Customer Portal Manager Standard	Case Layout	Case CallBack
	Overage High Volume Customer Portal User	Case Layout	Case CallBack
	Partner Community Login User	Case Layout	Case CallBack
	Partner Community User	Case Layout	Case CallBack
	Partner User	Case Layout	Case CallBack
	Read Only	Case Layout	Case CallBack
	Service Cloud	Case Layout	Case CallBack
	Solution Manager	Case Layout	Case CallBack

- 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



SETUP > OBJECT MANAGER

Details	Edit Page Layout Assignment Task			Help for this Page 🧲
Fields & Relationships	The table below shows the page layout assignm and drag to select a range of adjacent cells. Use			
Page Layouts	page layout from the drop-down.			
Lightning Record Pages	Save	Cancel		
Buttons, Links, and Actions	Page Layout To Use: C	allBack Layout	▼ 41 Selected 4	11 Changed
Compact Layouts		Record Types		(1-3 of 3)
compact Layouts	Profiles	Master	CallBack	Call Task
	Analytics Cloud Integration User	Task Layout	CallBack Layout	Call Layout
Field Sets	Analytics Cloud Security User	Task Layout	CallBack Layout	Call Layout
	Authenticated Website	Task Layout	CallBack Layout	Call Layout
Object Limits	Authenticated Website	Task Layout	CallBack Layout	Call Layout
	Chatter External User	Task Layout	CallBack Lavout	Call Layout
Record Types	Chatter Free User	Task Layout	CallBack Layout	Call Layout
Record Types	Chatter Moderator User	Task Layout	CallBack Layout	Call Layout
	Chatter Only User	Task Layout	CallBack Layout	Call Layout
Search Layouts	Company Communities User	Task Lavout	CallBack Lavout	Call Layout
	Contract Manager	Task Layout	CallBack Lavout	Call Layout
Triggers	Cross Org Data Proxy User	Task Layout	CallBack Layout	Call Layout
00	Custom: Marketing Profile	Task Layout	CallBack Layout	Call Layout
Validation Rules	Custom: Sales Profile	Task Layout	CallBack Layout	Call Layout
validation Rules	Custom: Support Profile	Task Layout	CallBack Layout	Call Layout
	Customer Community Login User	Task Layout	CallBack Layout	Call Layout
	Customer Community Plus Login User	Task Layout	CallBack Layout	Call Layout
	Customer Community Plus User	Task Layout	CallBack Layout	Call Layout
	Customer Community User	Task Layout	CallBack Layout	Call Layout
	Customer Portal Manager	Task Layout	CallBack Layout	Call Layout
	Customer Portal Manager Custom	Task Layout	CallBack Layout	Call Layout
	Customer Portal Manager Standard	Task Layout	CallBack Layout	Call Layout
	External Identity User	Task Layout	CallBack Layout	Call Layout
	Force.com - Free User	Task Layout	CallBack Layout	Call Layout
	Gold Partner User	Task Layout	CallBack Layout	Call Layout
	High Volume Customer Portal	Task Layout	CallBack Layout	Call Layout
	High Volume Customer Portal User	Task Layout	CallBack Layout	Call Layout
	Marketing User	Task Layout	CallBack Layout	Call Layout
	Overage Customer Portal Manager Custom	Task Layout	CallBack Layout	Call Layout
	Overage Customer Portal Manager Standard	Task Layout	CallBack Layout	Call Layout

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'



-			
setup	\sim	Home	Ob
Q app manager			
∨ Apps			5
App Manager			\leq

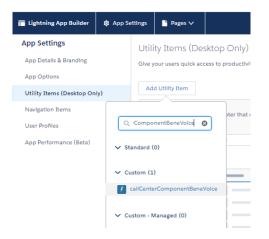
b. In App Manager you can add Benemen softphone utility item to wanted SF Lightning apps , typically "Sales - Lightning Sales" AND/OR "Service Console – LightningService"

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

	Lightning Exp	erience App Manage	er	New Lig	htning App New C	Connecter	d App
iten	ns • Sorted by App Name •	Filtered by TabSet Type		a the second second	- 201 - 1940 - 2010		¢ •
	APP NAME 🕇 🗸 🗸	DEVELOPER NAME	DESCRIPTION	LAST MOD 🗸	арр түре 🗸 🗸	VI >	~
	App Launcher	AppLauncher	App Launcher tabs	29.3.2018 12:29	Classic	~	
	Benemen SoftPhone	Benemen_SoftPhone	App with Benemen SoftPhone component.	10.4.2018 10:11	Lightning (Managed)	~	
	Benemen Softphone	Benemen_Softphone_Classic		10.4.2018 10:11	Classic (Managed)		
	Community	Community	Salesforce CRM Communities	29.3.2018 12:29	Classic	~	
	Content	Content	Salesforce CRM Content	29.3.2018 12:29	Classic	~	
	Force.com	Force_com	Start Here	29.3.2018 12:29	Classic	~	
	Marketing	Marketing	Best-in-class on-demand marketing automation	29.3.2018 12:29	Classic	~	
	Platform	Platform	The fundamental Lightning Platform	29.3.2018 12:29	Classic		
	Sales	Sales	The world's most popular sales force automation (SFA) solution	29.3.2018 12:29	Classic		
0	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	29.3.2018 12:29	Lightning	~	G
1	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	29.3.2018 12:29	Lightning	Edit	
2	Service	Service	Manage customer service with accounts, contacts, cases, and more	29.3.2018 12:29	Classic	, r	
3	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service	29.3.2018 12:29	Lightning	~	
4	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	~	

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





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

App Settings	Utility Items (Desktop On	ly)	
App Detalis & Branding	Give your users quick access to produ	ctivity tools and add background utility items to your app.	
App Options			
Utlilty Items (Desktop Only)	Add Utlifty Item	Utility Bar Alignment 🕚 Default	*
Navlgation Items	BeneVolce	PROPERTIES	
Navlgation Rules	🦸 Omnl-Channel	callCenterComponentBeneVolce	
User Profiles	() History	✓ Utility Item Properties	
	Notes	* Label	0
		BeneVolce	
		Icon	0
		D phone_portralt ×	
		Panel Width	0
		392	
		Panel Height	0
		660	
		Start automatically	0

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)



	Servi	ceConsole2	Cases	~
	Cases Omat	avoimet tapa	ukset 🔻 🕴]
50+ ite	ms • Sorte	d by Date/Time Oper	ned • Filtered by m	y cases - Closed,
		Case Number	 Contact 	Name
1		00005287	Paul Ne	wman
2		00005286	Paul Ne	wman
3	_ (00005285	Justin C	ase
	BeneVo	lce		-
	Availab	ie, receive pool calla	Customer	Service
1	â	04	Ð	=
_				
	salesf			
	_			
		emo1 Salesforce Available		^
		emo2 Salesforce Available		
Ģ		emo3 Salesforce Available		
(emo4 Salesforce Available		
		emo5 Salesforce Available		
		Available		•
	neVolce	0.000		
1 DEI	ie vuice	O Omnl-Channe	en e matory	

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
 Setup Home Object Manager
 Presence statuses
 Service
 Omni-Channel
 Presence Statuses
 Let agents indicate when they're online and available to receive work items from a
- 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)



Save Cancel	Let agents indicate when they're online and available to receive work items from a specific service channel, or whether they're away or offline.
Basic Information	Save
Status Name In a Call	Basic Information
Developer Name In_a_Call	Status Name Wrap Up
	Developer Name Wrap_Up
Choose whether agents are online or busy when they use this status. Online statuses let agents receive new work items. Busy statuses make	
Online	Choose whether agents are online or busy when they use this status. Online statuses let agents receive new work items. Busy statuses make
Busy	Online
	Buty
Save Cancel	
	Save Cancel
Let agents indicate when they're online and available to receive work items from a specific service channel, or whether they're away or offline.	
Save Cancel	
Basic Information	
Status Name In a Case	
Developer Name In_a_Case	
Choose whether agents are online or busy when they use this status. Online statuses let agents receive new work items. Busy statuses make your agents appe	
Online Day	
Select one or more service channels to assign to this presence status. Agents logged into this presence status can receive work from the channels you select.	
Available Channells SOS SOS Available Channells Solution of the Channells Available Chan	
Save Cancel	

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)

Profiles			
Profile Standard User			
C. Find Settings (0, Find Settings (etc.) (cione) Edit Profile Overview > Service Presence Statuses Access Available Service Presence Statuses	Access (Enabled Service Presence Statuses	Save Cancel
Busy .	Add F Remove	Available Available - Chat Available Case In a Case Lunch On Break Wrap Up	•

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	Statue	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limite	Appa	Tabe	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

Call Center	Benemen Call Center Ad	
Phone		

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

Permission Set Assignments	Edit Assignments	Permission Set Assignments Help
Action Permission Set Label		Date Assigned

d. Add Benemen SoftPhone and Save

Mikko Silonsaari



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.

Configuration guide

		Delete Template
Phone Workflow 🚯		
None		•
* SoftPhone Mode 🚯		
softphone		•
BenemenExternalUserId 🕕	₽ ×	
Benemen User:		
Case RecordType		
ask RecordType		
Disable Call Task Creation 🚯		
None		•
Disable Call Task Pop Up 🕕		
None		-
Save Call Info On Case 🕚		
In Progress Call Task Default Status 🕕		
In Progress Call Task Default Status ()		
None		
None		•
None Agent Wrap-Up Timeout(ms) 5 000		
None Agent Wrap-Up Timeout(ms) 5 000		· · · · · · · · · · · · · · · · · · ·
None Agent Wrap-Up Timeout(ms) () 5 000 Agent Workload Limit () 50		•
None Agent Wrap-Up Timeout(ms) 5 000 Agent Workload Limit 50 • Query Type		
None Agent Wrap-Up Timeout(ms) (1) 5 000 Agent Workload Limit (1)		•
None Agent Wrap-Up Timeout(ms) 5 000 Agent Workload Limit 50 • Query Type		
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 ()		

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benemen



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.

		Adam Parsons			Adam Parsons
Edit	Save as Template		Edit	olate Name S	Save Template
•	When configuring the ne		ne saved templat Abigail Dickens	,	
	Phone Workflow () CaseDialog	Call Center User Sales User Team Leader User		· · · ·	•

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 <u>additional tenant level</u> <u>configuration</u>.

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 ² icon. Search and Map User window will pop-up. You can search for the Benemen Users with email or name.



				×
Task Record		Search and N	Map User	
Disable Cal	Search			
	Q abi			8
Disable Cal	First name	Last name	Email	Мар
Disable Cal	Dickens	Abigail	abigail.dickens@domain.com	+
Save Call Ir			[Close
Click the	+ icon to map		Abigail Dickens	
Phone W CaseDia				
SoftPhon softpho	e Mode 🚯 ne			
a0c957	ExternalUserId ① dc-0051- n User: Dickens Abigail,		× ain.com	

Case and Task RecordType

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

	÷
Task RecordType	
	\$

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)



Configuration guide

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.





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 <u>salesforcelogs@benemen.com</u> 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 Templat	le Name	Object	Last Modified Date
Edit 🔥	Send Email On Log Create	Error Log Terr	<u>iplate</u>	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

Clickjack Protection	
Enable clickjack protection for Setup pages 1	
Enable clickjack protection for non-Setup Salesforce pages i	
Enable clickjack protection for customer Visualforce pages with standard he	aders i
Enable clickjack protection for customer Visualforce pages with headers dis	abled 1
Whitelisted Domains for Visualforce Inline Frames	
Allow iframes of Visualforce pages with clickjack protection on external domains Protection.	s. To enable this feature, whitelist external domains where you allow framing. Then, turn on one of the "Enable clickjack protection for customer Visualforce pages" preferences under Clickjack
Enabling this feature is optional and doesn't change existing clickjack protection	1
Whitelisted Domains	Add Domain
whitelisted Domains	Ad Doman
No records to display	

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
 - Dynamic Checking of VF Host 🕚
- 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. <u>https://<customer</u> 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
- Remove last two characters "#/" (e.g <u>https://<customer</u> 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

Dynamic Checking of VF Host



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

Record Type Call Task

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available

	Edit
Record Type Label	Call Task
Record Type Name	CallTask
Namespace Prefix	
Description	
Created By	Tomasz, 10.1.2019 14:09

Picklists Available for Editing			
Action	Field	Modified Date	
Edit	CallBack Status		
Edit	Call Result	23.8.2019 10:52	
Edit	Call Type	23.8.2019 10:52	
Edit	Priority	22.1.2019 14:38	
Edit	Status	22.1.2019 14:38	
Edit	Subject	22.1.2019 14:38	
Edit	Туре	22.1.2019 14:38	

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

Record Type Edit Task Priority

General Properties				
		Field Label Record Type	Task Priority Call Task	
Picklist Values				
Select an item from the Available Values list and add it to the Selected Values list to include it as a pickl Type.				
Available Value	s	Selected Values		
None 🔺	Add Remove	High (High Priority) Normal Low		
		Default	Normal 🔻	
Normal				
				Save Cancel



- 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.