BeneVoice for Salesforce

Use Cases and Core Functionality

BeneDesk for Windows

Contents

1   Introduction

The purpose of the document is to describe use cases and functionalities of the BeneVoice for Salesforce solution.

The document covers softphone use cases for BeneDesk for Windows (BDfW). If using BeneVoice web phone, login and softphone usage is different than described in this document.

1.1   Prerequisites

- User has Benedesk for Windows softphone installed on PC
- User has BeneCloud user profile created and credentials to login to softphone
- User is activated for BeneVoice on Salesforce tenant and BeneCloud.

1.2   Login and Logout

1.2.1   Login / Logout to Benedesk for Windows softphone

During normal operation user logins once to the softphone and there isn't any specific reason to logout from softphone.

1.   On Windows PC, search & open BeneDesk for Windows

Best match

B   **BeneDesk for Windows**
    Desktop app
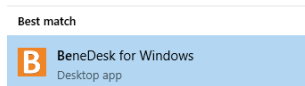
2.   Provide your BeneCloud user credentials -> Login
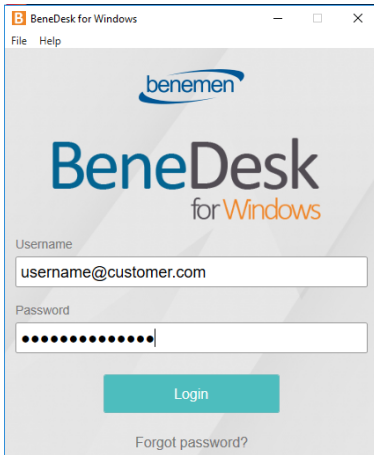
3. When logged in, user's current softphone profile is loaded. (Softphone can remain background/hidden during normal operations via Salesforce UI)
   - Left: Service Pool Voice Queue & Call details
   - Middle: Advanced softphone call management
   - Right: Directory, User Call details and Availability
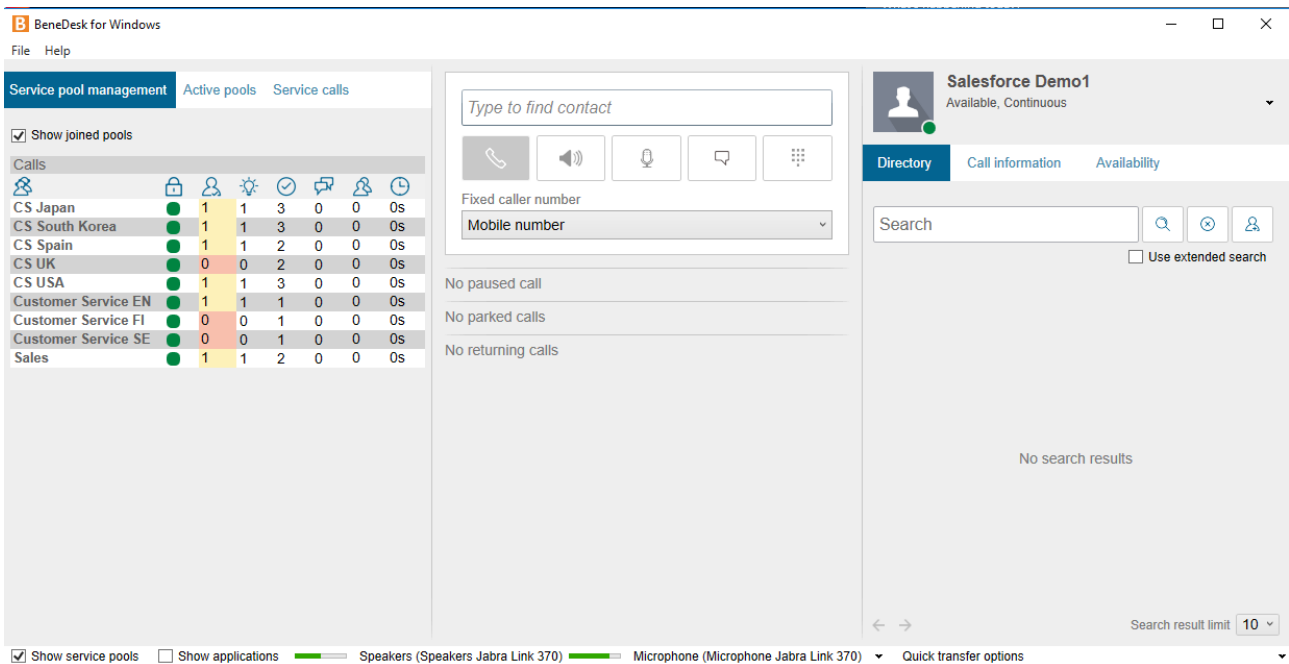
4. User logins as normal to salesforce.com and opens lightning app, where also Benemen Softphone utility item is visible. Softphone always displays the current status type of the phone service.
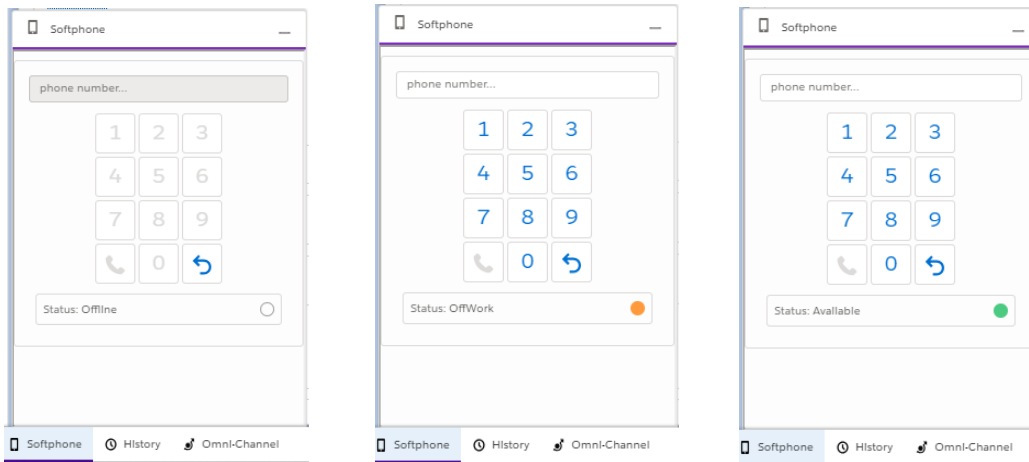
- Error -> Local PC issue.
  - Please restart BDfW or fully reboot PC. If not resolved, consult Benemen support.
- Offline -> Not logged in to BDfW softphone.
  - User must login to BDfW softphone in order to receive / make phone calls.
- Offwork -> Softphone integration OK with OffWork user status.
  - Can't receive voice queue calls.
  - Can make outbound calls and receive direct calls. (depending on BeneDesk call handling configuration)
- Available -> Softphone integration OK with Available user status.
  - Can receive service calls. (for the voice queues where user is active)
  - Can make outbound calls and receive direct calls. (depending on BeneDesk call handling configuration)

The following BeneCloud phone service status types might also be reported. These are not normally used with contact center and omni-channel integration sceanrios.

- DND -> Softphone integration OK with Do not disturb status.
  - Can't receive voice queue calls or direct calls.
  - Can make outbound calls
- Busy -> Softphone integration OK with Busy status
  - Can receive service calls. (for the voice queues where user is active)
  - Can make outbound calls and receive direct calls. (depending on BeneDesk call handling configuration)

1.2.2   Omni-Channel Availability integration - Login and Logout to work

This chapter applies only if Omni-channel Availability Integration is enabled. Then during normal operations user controls login and logout to work including Voice queues via Salesforce Omni-Channel widget. On the background user must always be logged in to BDfW softphone.

User logins to Salesforce omni-channel and voice queues via Salesforce Omni-Channel widget.
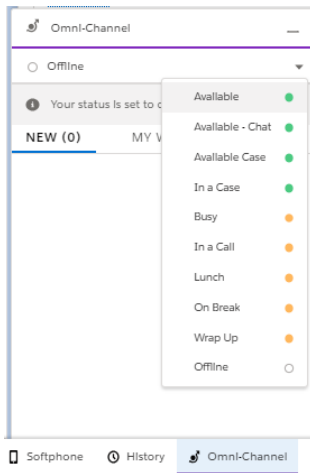
- Background info:
  - When user changes status from Offline to any other status, this activates user in the configured voice BeneCloud voice queues and sets user BeneCloud status to OffWork or Available. User status mapping is done by Salesforce admin.
  - When user changes status from any other status to Offline, this will deactivate user in the configured voice queues and set user BeneCloud status to OffWork.

- Going Offline from BeneCloud voice queues works when user initiates this via Omni-channel widget
- If user goes Offline in Omni-channel by any other reason e.g. closing browser, losing network connection, etc., this will not deactivate user in Benecloud voice queues.
- In such a situation user will continue receiving service calls in softphone / configured backup phone terminal, typically mobile device & number. User can then control voice queue activation/deactivation via Benemen UI's (softphone, BeneApp in mobile, https://discover.benedesk.com web)

1.3 Omni-Channel Availability integration

This chapter applies only if Omni-channel Availability Integration is enabled.

In addition to login and logout to work availability handling, BeneVoice provides rich availability integration between Salesforce Omni-Channel and BeneCloud voice channel.

- When working via Salesforce Omni-channel, all status changes are controlled via Omni-Channel widget
- User statuses are mapped by Salesforce admin and updated on the background in real time to BeneCloud voice channel.
- Examples:
  - If user goes Lunch status in Omni-channel, this will update Lunch offwork status also to BeneCloud side.
  - User may have certain available type presence statuses for native omni-channel service channels only, e.g. available only for Chat. This can be mapped as Offwork status to Benecloud so user will not receive any service calls, but concentrates working only with Chat service channel
  - Simlilarly user may have presence status which makes user available only in voice channel
- For service call handling the integration provides automated "In a Call" and "Wrap Up" handling
  - As soon as phone call is ringing on user desktop or user initiates outbound call, Omni-channel status is automatically changed to "In a Call" and user is busy in omni-channel

---

o If the call is answered and then ended, status changes automatically to busy "Wrap Up" status. Wrap Up time is configured by Salesforce admin. User can manually change status from Wrap up to something else before configured maximum time. When configured Wrap Up time ends, status reverts back to original status before the call. Wrap up time is optional e.g. this can be left empty in the configuration if not used.

o If the call is not answered, there isn't any wrap up status, but status goes automatically back to the original status

- Additionally integration provides "In a Case" system status to prioritize Omni-Channel service channels and workload over service calls. Salesforce admin can configure numeric workload limit value. If user's workload is the same or higher than configured value, "in a Case" status is automatically set and user goes Offwork in BeneCloud side.

- Example of user status mapping done by Salesforce admin

1.4 Embedded softphone and call notification

Embedded softphone provides the following functionality:

- Answer, Decline / End phone call
- Click-to-dial from Salesforce
- Make phone call manually and control in a call dtmf
- Displays current BeneCloud user status
- Displays information of the current call: Caller number, direction, status and time

Visible call notification is separately provided via Windows application level notification:

- Displays Voice queue name. Voice queue name is primary tool used for information about caller, queue, call purpose etc.
- Call notification gives also quick access to answer / decline incoming call
- Call notification is not dependant on any browser / Salesforce
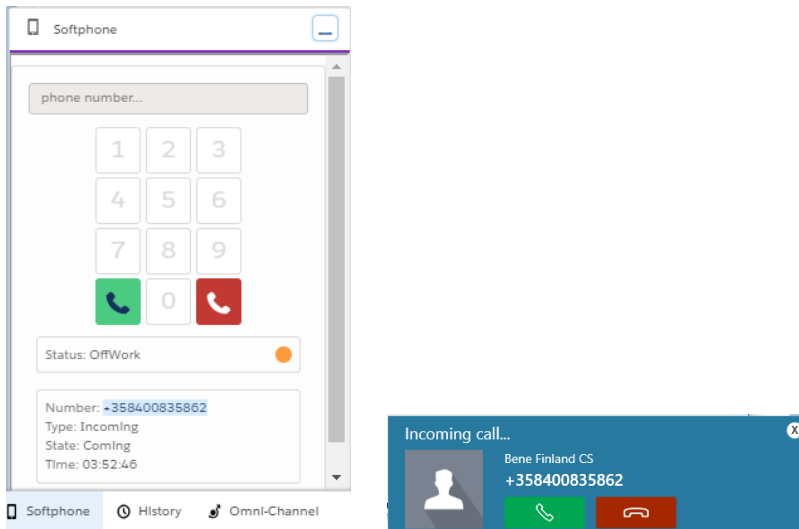
More advanced call management is done via BeneDesk for Windows softphone UI. Please see chapter Advanced Call Handling .

2   Integration phone workflows

BeneVoice includes currently 4 different phone workflow options. Selected phone workflow determines what actions are happening with inbound / outbound phone calls.

- Case: Automated case creation without additional contact and account dialog. Targeted for quick case creation.
- CaseDialog: New & Existing Case handling with contact and account dialog. Targeted for enhanced contact and account identification and case handling.
- Contact&Account: Enhanced Contact & Account identification.
- Contact&Lead: Contact identification. New Lead handling for not identified contacts.

The following sub-chapters are describing the phone workflows in more detail with all the different call scenarios.

User based phone workflow is configured by admin via BeneVoice configuration app as part of other user specific configuration items. Please see chapter 5 for configuration details.

2.1   Case workflow

2.1.1   Incoming Single identified

1. As soon as call rings on the desktop, identified Contact / Account card is opened and focused
   a. Voice queue name and caller number visible in a call notification. Latter also in embedded softphone.
   b. Answer / Decline via call notification or embedded softphone
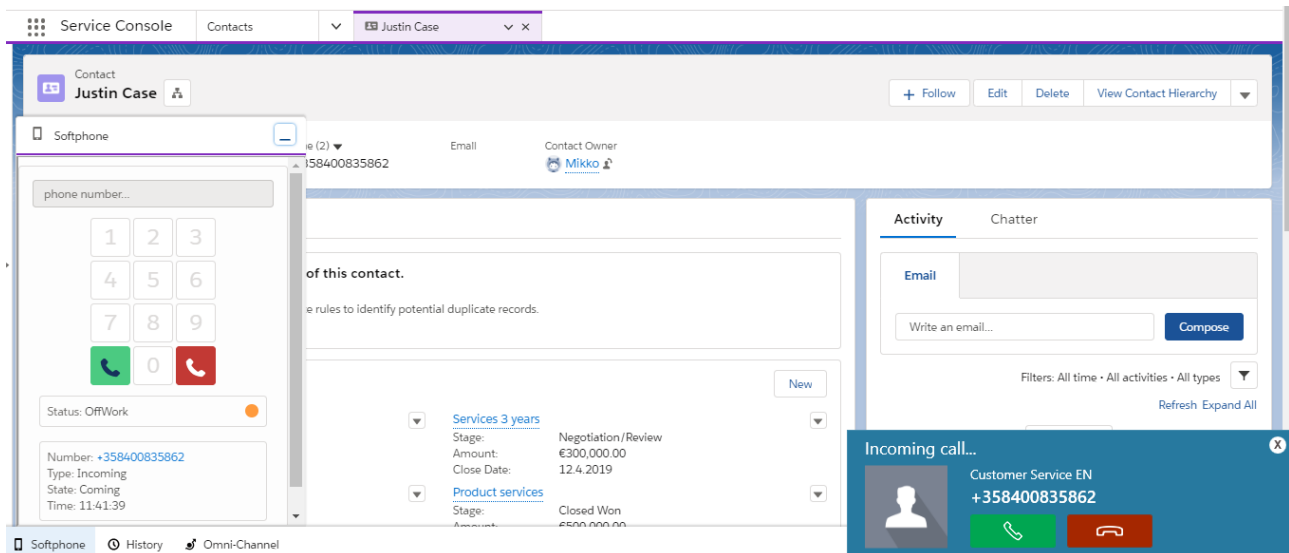
2. As soon as Agent answers the call, new Case is automatically created for the contact & focused. Case origin is Phone. If the call was not answered, then case is not created. Call task activity creation for not answered calls depends on user configuration (see chapter 5)
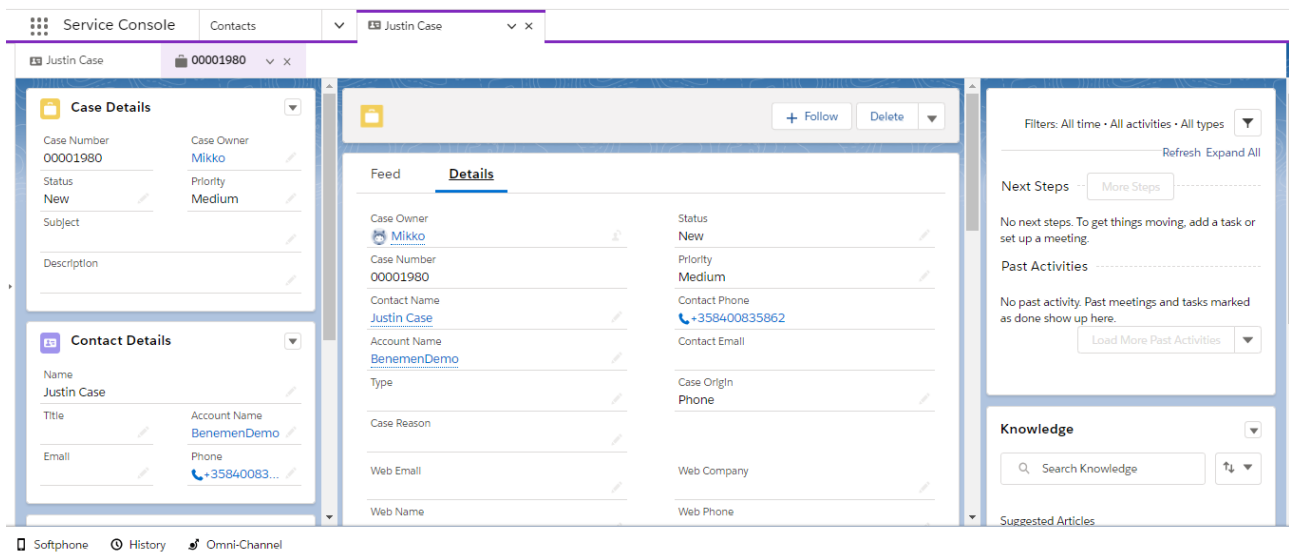

3. As soon as answered call is ended, call task activity including all the relevant call details, is created on the background. This is automatically assigned with identified contact and related to the case. User configuration allows to pop-up created call task activity if needed. Please see chapter 5 for details.

4. 5 minutes later, possible recording link and queue wait time are added to the call task activity on the background. Link will open new browser window to BeneDesk web UI to listen call recording. Agent authenticates (once) using BeneCloud user credentials.

2.1.2 Outbound Single identified

1. Click-to-dial from Salesforce. Agent can decline call if needed via embedded softphone.
2. If Click-to-dial was initiated somewhere else than Contact/Account card, the card will be opened
3. Called contact answers / declines -> Flow works the same as with inbound flow above

2.1.3 Incoming Not identified / Multiple Identified

1. No special action is taken when call rings on the desktop
   a. Voice queue name and caller number visible in a call notification. Latter also in embedded softphone.
   b. Answer / Decline via call notification or embedded softphone
2. As soon as Agent answers the call, new empty Case is automatically created & focused. Case origin is Phone. If the call was not answered, then case is not created. Call task activity creation for not answered calls depends on user configuration (see chapter 5)
3. Agent uses standard case handling routines updating/creating contact
4. As soon as answered call is ended, call task activity including all the relevant call details, is created on the background. This is automatically assigned with identified contact and related to the case. User configuration allows to pop-up created call task activity if needed. Please see chapter 5 for details.
5. 5 minutes later, possible recording link and queue wait time are added to the call task activity on the background. Link will open new browser window to BeneDesk web UI to listen call recording. Agent authenticates (once) using BeneCloud user credentials.

2.1.4 Outbound Not identified / Multiple Identified

1. Click-to-dial/ Manual call from Salesforce. Agent can decline call if needed via embedded softphone.
2. No identification will be made
3. If the called contact answers, empty case is automatically created
4. Flow continues as above incoming flow

2.2   CaseDialog workflow

Another workflow option with Case creation and handling. Idea is to provide additional contact and existing case identification before actual case handling.

Call task activities are created on the background and automatically assigned to contact & related to case the same as with standard Case workflow. Call task activity creation is further controlled via user configuration. Please see chapter 5 for details.

Incoming calls are answered / declined via application call notification while workflow is controlled via Salesforce.
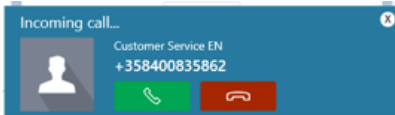
2.2.1   Not Identified

As soon as call rings on the desktop, the below dialog is opened in Salesforce.

- Caller number and Voice queue name. (or 'Direct' if direct call to agent phone number)
- Option to open empty "New Case"
- By default option to search existing Contact / Account by name. Additional search variables can be configured by admin.
    - o   Results will by default show Contact and Account name. Additional result details can be configured by admin. E.g. email address, birthdate, etc.
    - o   If found, option to automatically update phone number and choose contact
    - o   Choosing existing contact will take to Single identified contact dialog
    - o   New Case button to create a new case without contact identification
- Close (X) buttons to close dialog without any action.
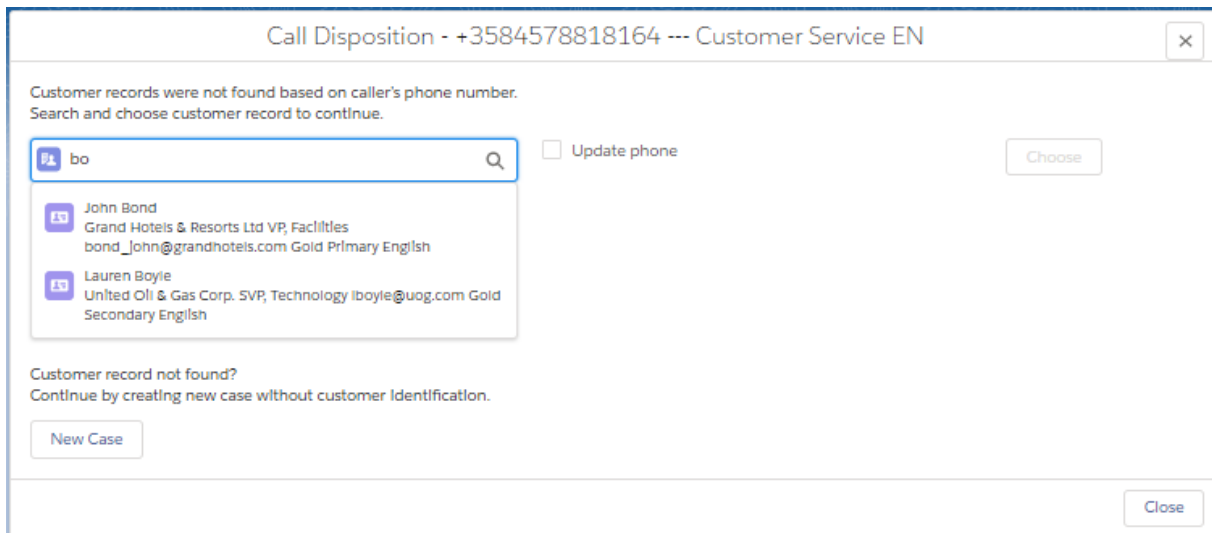
2.2.2   Single identified

As soon as call rings on the desktop, the below dialog is opened in Salesforce

- Contact information: Contact name, Account name + additional details configured by admin
- Voice queue name if the call received via queue, otherwise 'Direct'

- Core details of the five last modified Cases with option to continue working with one. Admin can configure what details are visible.
- Option to search some other existing case for the contact. By default search is by case number, but admin can add additional search variables e.g. Subject.
- Button to create "New Case" for the contact
- Button to create "New Case – Not Identified" without customer identification at this point.
- Close (X) buttons to close dialog without any action.

Case Number	Account Name	Subject	Created Date	Last Modified Date	Name	Status	Case Reason	Priority	Case Origin	Booking Number	
00006638	BenemenDemo	CallBack - 15.05.2020 11:52	15.5.2020 11:52	15.5.2020 11:52	Mikko	New		Medium	Phone		Choose
00004901	BenemenDemo	Tilauskysely	12.12.2019 14:57	15.5.2020 8:15	Mikko	Closed	Myynti	Medium	Email	0123470	Choose
00006620	BenemenDemo	Huoltotilaus	12.5.2020 12:20	15.5.2020 8:10	Mikko	Escalated	Ongelma	Medium	Phone		Choose
00001662	BenemenDemo	Cancellation	14.3.2019 11:57	15.5.2020 8:10	Mikko	Escalated	Other	High	Phone		Choose
00001652	BenemenDemo	Vakuutustilaus	13.3.2019 19:45	15.5.2020 8:10	Mikko	Working	Myynti	High	Phone		Choose

Create New Case for the Identified customer

[New Case]

Create New Case without customer identification

[New Case – Not Identified]

[Close]

2.2.3   Multiple identified

As soon as call rings on the desktop, the below dialog is opened in Salesforce

- On top line caller number and Voice queue name visible. (or Direct if call was not received via queue)
- Lists identified Contacts / Accounts (max 10 of both)
- By default Type, Full Name, Account Name details are shown. Admin can add additional details to be shown.
- Choosing one will take agent to Single identified dialog
- Search some other contact / account. The same as with Not Identified flow.
- New Case button to create empty case without any contact/account mapping
- Close (X) buttons to close dialog without any action.

2.2.4   Outbound calls

Currently CaseDialog workflow doesn't have any specific workflow action for outbound call.

Click-to-dial can be initiated from any phone number type field in any view. (Please consult Benemen if click-to-dial should be available in other data type fields than phone number)

By default Call task activities are created on the background for each outbound call. Call task creation and pop-up can be controlled via user configuration. Please see chapter 5 for details.

If outbound click-to-dial was initiated from Contact object, contact name is automatically assigned in the created call task activity.

If outbound click-to-dial was initiated from some other object, by default automated related to or contact name assignment is not done in the created call task activity. However these can be enabled on tenant and user level configuration. Please see chapter 5 for details.

2.3   Contact&Account workflow

Contact&Account workflow concentrates caller identification, opening identified contact / account view and providing optimized flow creating new records.

Call task activities are created on the background and automatically assigned to contact / related to selected account. Call task activity creation is further controlled via user configuration. Please see chapter 5 for details.

2.3.1   Not Identified

As soon as call rings on the desktop, the below dialog is opened in Salesforce.

- Caller number and Voice queue name. (or 'Direct' if direct call to agent phone number)
- By default option to search existing Contact / Account by name. Additional search variables can be configured by admin.
  - Results will by default show Contact and Account name. Additional result details can be configured by admin. E.g. email address, birthdate, etc.
  - If found, option to automatically update phone number and choose contact

o Choosing existing contact will take to Single identified contact dialog

- Buttons "New Contact" and "New Account" to create new record. Caller number is automatically included as Phone number.
- Close (X) buttons to close dialog without any action.
- Call Task Activity is created when phone call ends based on used configuration. See chapter 5 for details.
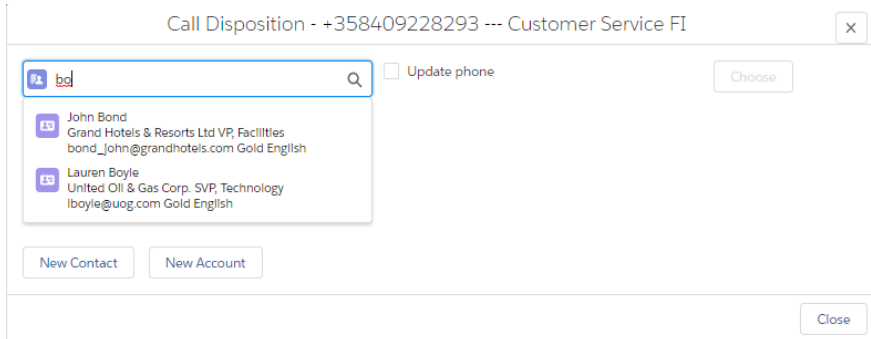

2.3.2 Single Identified

Identified Contact / Account view is automatically opened as soon as incoming phone call start ringing on user's desktop.

Call Task Activity is created when phone call ends based on used configuration. See chapter 5 for details.

2.3.3 Multiple identified

As soon as call rings on the desktop, the below dialog is opened in Salesforce

- On top line caller number and Voice queue name visible. (or Direct if call was not received via queue)
- Lists identified Contacts / Accounts (max 10 of both)
- By default Type, Full Name, Account Name details are shown. Admin can add additional details to be shown.
- Choosing one wil open given Contact / Account card
- Search some other contact / account. The same as with Not Identified flow.
- Buttons "New Contact" or "New Account" to create new record. Caller number is automatically included as Phone number.
- Close (X) buttons to close dialog without any action.
- Call Task Activity is created when phone call ends based on used configuration. See chapter 5 for details.
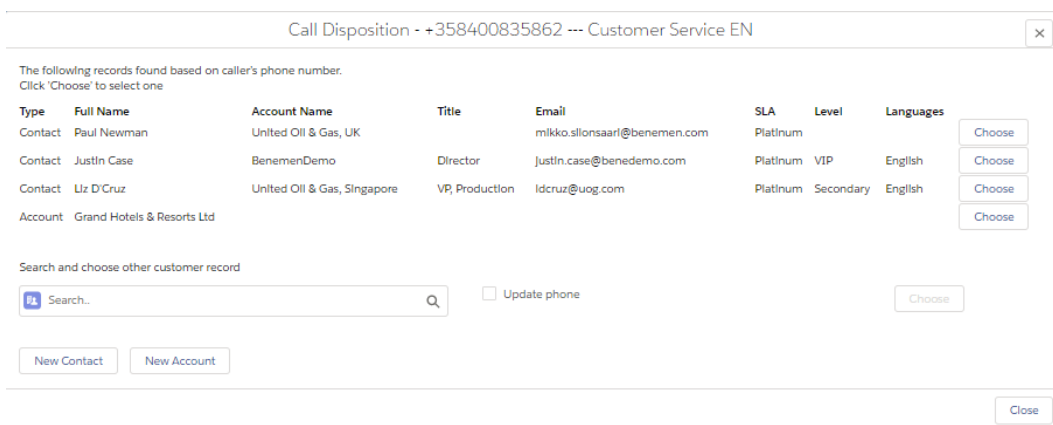
2.3.4   Outbound Calls

Currently no specific workflow action with outbound calls.

Click-to-dial can be initiated from any phone number type field in any view. (Please consult Benemen if click-to-dial should be available in other data type fields than phone number)

By default Call task activities are created on the background for each outbound call. Call task creation and pop-up can be controlled via user configuration. Please see chapter 5 for details.

If outbound click-to-dial was initiated from Contact object, contact name is automatically assigned in the created call task activity.

If outbound click-to-dial was initiated from some other object, by default automated related to or contact name assignment is not done in the created call task activity. However these can be enabled on tenant and user level configuration. Please see chapter 5 for details.

2.4   Contact&Lead workflow

Contact&Lead workflow concentrates caller identification,opening identified contact / lead view and providing optimizes flow creating new records.

Call task activities are created on the background and automatically assigned to contact / related to selected account. Call task activity creation is further controlled via user configuration. Please see chapter 5 for details.

The logic is the same as with Contact&Account workflow, but plays with contacts and leads.

3   Call Task Activities and details in Salesforce

By default call details are automatically saved as call task activities in Salesforce for all the phone calls handled via desktop integration. This occurs when phone call ends.

Depending on the workflow and caller identification, call task activities are automatically assigned to identified Contact and related to worked Case or identified Account. Additionally, for outbound click-to-dial calls related to and contact matching can be automated.

Admin based user configuration provides extensive configuration options 'when and how' call task activities are created. Please see chapter 5 for details.

Customer may freely modify call task layout including needed fields and details.

The solution provides also an option to automate call task activity creation for 'any' BeneCloud phone call i.e. also for other phone calls than the ones done via Salesforce and BDfW softphone integration. Please see Calls Lookup for more details.

3.1   Available Call Details information

The following call details can be included in the call task activity. Salesforce admin may freely modify the visible fields and also add some customer specific details.

- Call End Time
- Call Duration
- Phone Number 2 (caller number)
- Service Pool Queue (voice queue name)
- Queue Wait Time (and numeric Queue Wait Time Sec. Added 10 – 300 seconds after activity creation)

- Advanced Call Details (URL to access possible call recording and call details in BeneCloud side. Added 10 – 300 seconds after activity creation)
- Call Type (incoming / Outbound)
- Call Result (Answered / Not Answered)
- Phone to (used with Calls Lookup only. Includes BeneCloud user phone number in the customer phone call)
- Call Date (used with Calls Lookup only. Timestamp when the customer phone call occured)

3.2   Option: Case based workflows - call details saved within case object

Recommendation is to save call details as Call Task Activity with automated relation to the case. However this configuration option can be used for saving call details within worked case. This applies to the Case and CaseDialog workflows.

Note: All call task activity related configuration options are disabled and not used, when 'Save Call Info on Case' option is checked.

3.3   Additional information

"Service Pool Queue" and name has central role with BeneCloud voice queues

- Primary tool / attribute to provide information of the caller, purpose, etc.
- Benemen is not limiting amount of service pools and customer may freely name them
- Visible in call notification, informing agent of the caller, language, purpose, etc.
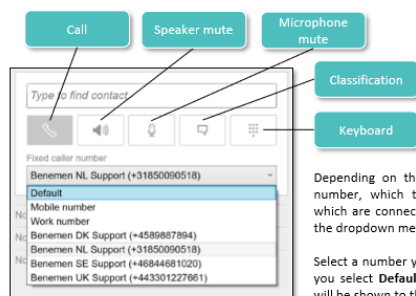
Wrap Up / After call time details

- Salesforce Omni-Channel and BeneVoice omni-channel availability integration enables Wrap Up handling fully in Salesforce side
- Wrap Up time is then part of the native Salesforce User Presence dashboards and reports
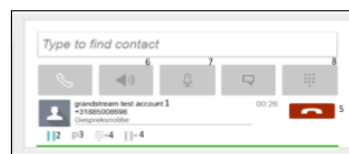
4   Advanced Call Handling

Advanced in a call handling can be operated via BeneDesk for Windows UI.

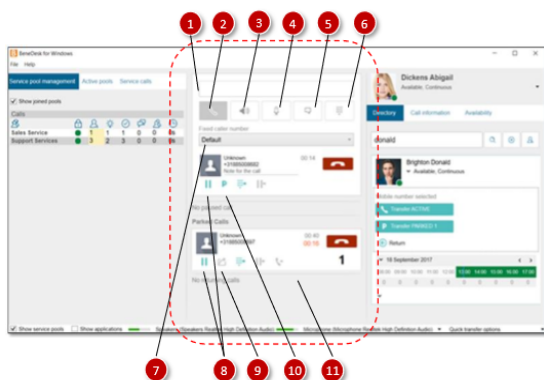(Please see complete guidance in BeneDesk for Windows user guide)

| Call parking	Hold	Returning a call
When there are several incoming calls at the same time, it is possible to park calls, by using the **Park a call** button (10). If the parked calls are not answered they will return to you. You can park several calls at the same time. There are four park functions, as follows: • Hold • Take-back • Transfer (on the next page) • Hang up	A call can be put to hold with **Hold** button (8). When the call is on hold, the caller will hear music untill the user clicks the **Take back** button (9) and the call will continue. In the standard settings, one call at the time can be put in hold.	When the switchboard user has transferred a call to a number, which is not answering, the call returns to the switchboard. The call is shown as a returned call and the swithboard user knows how to handle it.

1. **Search field:** The switchboard user can search contact information from the search field by name or number
2. **Call button:** Type a name or number to the search field and press the **Call button** for callling
3. **Speaker mute**
4. **Microphone mute**
5. **Classification:** A call can be classified here. Click the bubble icon and fill in the classification data
6. **Virtual keyboard:** You can use the inbuilt keyboard by clicking the icon. Notice, that the functions, which are not in use are greyd. For example, the Call button becomes green when you first fill the number in the Search field.
7. **Your number:** Select a number you like to show, when calling. If you select the **Default**, the number you are calling from will be shown to the receiver.
8. **Hold button and calls on hold:** To put a call to hold, use the **Hold** button. You can see all the calls on hold in this section.
9. **Take back button:** Use the **Take back** button to return a call from park to you
10. **Park call button**
11. **Returning calls:** You can see the returning calls in this section

4.1 Call transfers

The switchboard user's tools can be found also in the middle part of the *BeneDesk for Windows* user interface. It is possible to handle the call transfers with three methods:
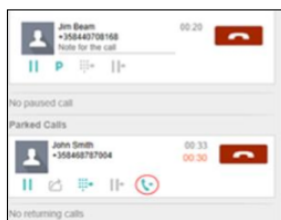
• Transfer with the keyboard
• Transfer with the directory
• Transfer after a consultation call

Transfer with the directory
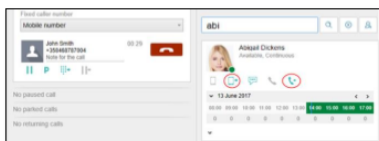
Search the receiver from the directory and click the person's phone or mobile phone icon (marked red on the image).

Transfer after a consultation call

The caller will be put on hold and the swithboard operator makes a consultation call to the receiver.

After the consultation call, the caller will be transferred to the receiver.

Transfer with the keyboard

Transferring a call with the keyboard divides in three phases.

1. Press the **Keyboard** button
2. A window will open, where you can type the number or search the person by name in the **Search** field
3. When you have the name or number ready, press the **Transfer** button

5 Salesforce Admin – User related configuration

The following configuration options are available for admins via BeneVoice lightning configurator app. These and other configuration is further described in separate *BeneVoice for Salesforce - Configuration guide* document.

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.

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

BeneCloud User ID is provided by Benemen. Required for each user.

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.

6   CallBack integration and handling in Salesforce

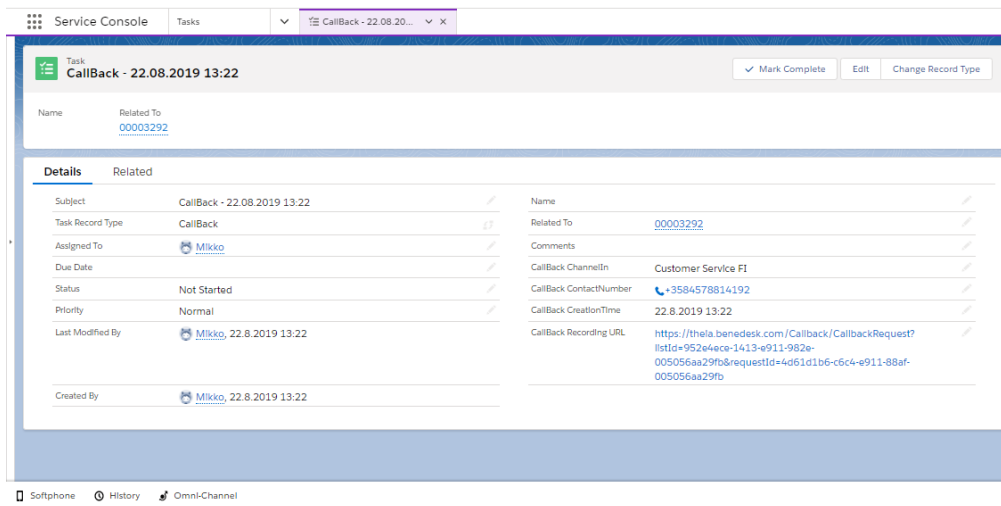BeneVoice includes option to integrate Benecloud callback functionality with Salesforce.

With this integration callback logic and service are implemented as standard service module at BeneCloud side, but callback requests are fully handled in Salesforce.

- Integration can be activated on Benecloud callback list basis. Configuration is described in separate *BeneVoice for Salesforce - Configuration guide* for admins.
- As soon as customer leaves callback on BeneCloud side, information is fetched to Salesforce and created as Salesforce Case, Task related to Case or Task only. Timespan for Salesforce record creation is max. ~20 seconds.
- All callback request handling is thereafter happening at Salesforce side. (As soon as callback request is successfully created on Salesforce side, it is automatically closed on BeneCloud side with 'Moved to SF' note.)
- Callback cases are assigned to configured Salesforce queues and customer may assign these to agents by any available method.
- Salesforce Omni-Channel with BeneVoice availability integration could be used here for realtime queueing and routing of callback cases.
- BeneVoice installation creates dedicated callback Case and Task record types and page layouts. Customer may modify these for own needs.
- Contact / Account identification is done based on caller's phone number.
  - If single Contact / Account is identified, then Case / Task is created for this record.
  - If none or multiple Contact / Account is identified, then Case / Task are created without any assigned Contact / Account record.
- Callback Case / Task subject is: "CallBack - <date & time when callback was left>"
- 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
- Standard BeneVoice functionality brings additional value for callback handling as agent's can use Click-to-dial for outbound calls and automated call task activities are created for the call attempts.

Example of CallBack Case from single identified contact:

Example of CallBack Task from not identified contact:

7   Dynamic Smart Routing based on any Salesforce data

Smart Routing functionality enables customer to dynamically route incoming phone calls based on Salesforce data. This is not especially affecting end user functionality, but enables intelligent routing decisions for incoming phone calls e.g. pass language IVR if we we know contact's preferred language, prioritize caller in a voice queue based on their SLA level or route phone call to the agent who is owner of the most recent case for the contact, etc.

Smart Routing is typically activated on voice queues level and requires activation also at BeneCloud configuration side. Benemen provides detailed implementation steps in a separate Smart Routing for Salesforce 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.

8 Enterprise Calls

Enables call activity creation in Salesforce for BeneCloud phone calls, which were not already done and created by Salesforce embedded softphone and phone workflows. Main use case is customer calls answered/made in another BeneCloud voice endpoint e.g. Mobile phone calls.

Enterprise Calls task activity creation happens automatically and doesn't require any actions from end users and is not activated on end user basis.

Instead, admin controls and activates if and how calls lookup is activated. Call task activities creation via calls lookup module has the following requirements

- Phone call must by marked as 'work call' in BeneCloud side
- Customer phone number must have at least a one contact record match in Salesforce

Admin can activate the functionality using continuous lookup mode, when call task activities are automatically created ~1 – 6 minutes after the customer phone call is ended. Additionally admin may use one time look up mode, which allows do the look up and call task activity creation up to 7 days old customer phone calls.

Admin controls if call details are created as call task or case object. Also default status of the created record is configurable. If customer phone number is matched with single contact record, the created record is automatically linked to this contact.

Call task / case owner is automatically identified based on BeneCloud user id. Requirement for this is that the user is also activated for BeneVoice for Salesforce including BenemenExternalUserID in the user configuration. Admin can configure default Salesforce user account, which is used as the owner when the above method is not available.

9 BeneCloud additional common use cases

9.1 Service Pool Management – Voice queues

Queue management can be handled flexible from any endpoint.

Management capabilities require BeneCloud Group Manager / Supervisor rights.

- BeneDesk web via https://discover.benedesk.com browser based tool
- BeneDesk for Windows softphone
- BeneApp on iOS and Android smartphones
  - https://play.google.com/store/apps/details?id=com.benemen.beneapp&hl=en
  - https://apps.apple.com/fi/app/beneapp/id989797121?l=en

9.1.1 BeneDesk Web

1. Login to https://discover.benedesk.com -> Service Pool Management
   Service Pool Management view gives realtime snapshot of voice queues available for given agents and admins.

2. Click any queue you would like to see in more detail and do changes in real time.
   a. Modify directly on this screen existing Agent details. Like activate in the queue, change skill level.
   b. Use "Users" option to remove & add users in the queue
   c. Use "Settings" to modify voice queue workflow.

3. Settings view is used to manage and modify voice queue workflow
   a. Modify queue announcements, transfers where the calls are connected with given option, schedules when queue is open / closed and exceptions
   b. Supervisor can upload new announcements to the system via "Create new prompt" option

---

c. "Details" show more detailed information on the configured workflow. These are done and modified via Benemen support request

9.1.2 BeneDesk for Windows

Please see BeneDesk for Windows QuickStartGuide for detailed guidance. Below the highlights.

Service pools, 1

- Management and monitoring
- Active service pools (next page)
- Service calls (next page)

Incoming calls, which are called to the company's service line are handled in service pools. A service pool is a queue, where the callers are waiting for a free resource to answer their call. In the service pool, a call is transferred to a right service person according to the persons' skills and availability. A switchboard operator can be a member in all service pools.

## Service pool management and monitoring

In the service pool management, a user can see only those pools, where he/she has user rights. A monitor view gives an overall picture of the whole service pool:
- Busy customer agents
- Active customer agents
- Calls:
    - Handled
    - Waiting (waiting time)

More detailed information of a service pool is shown, when clicking the service pool. Members' status is color coded, as follows: **Green = free, Red = busy**

Making changes
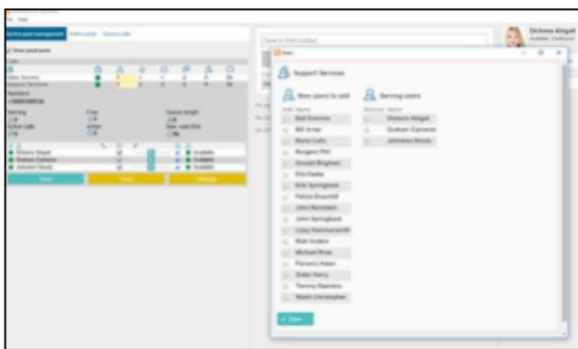
A group manager or a suprevisor can make changes to the service pools.

- As group manager or a supervisor, you can change the service pool resourcing according to the company's needs
- A switchboard user can be added or removed to/from a service pool according to the situation and company's needs

Changing a service pool
- Open the wanted service pool by a mouse click
- **Click** Users
- In the view, which opens, are two columns:
    - User who can be added
    - Users who are logged in

Name of the service pool is shown on the lef top corner. Check that you are changing the correct service pool.
- **Adding** persons is done by selecting them on the **left side column**
- **Removing** persons is done by selecting them on the **right side column**
- When making changes, select all customer agents who you will add or remove
- Save the chances by clicking the **Save** button
- The changes must be done by one service pool at the time. Same persons can be in several service pools.

Service pools, 2

- Active service pools
- Service calls

Active service pools

In the Active pools section, it is possible to control the users' availability information in those service pools, where they are members. In the picture below, a user can see in which pools he/she is a member and does he/she accept calls from the pool. With the button on right, the user can change his/her availability status in the queue.
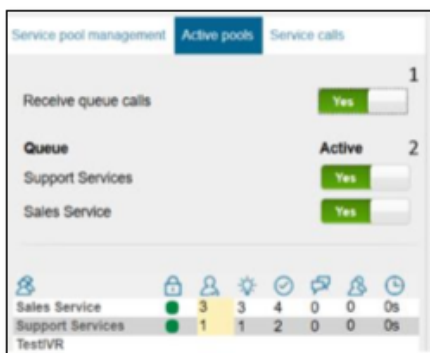
In the picture, can be seen an overall situation of all service pools and pool members.

A swithcboard user who is operating in many service pools is beneficial to see the pools' situation and receive calls according to the situation. Changes will come into effect immediately.

Service calls

In the Service calls section, you can see all service number calls in the specified time period. With the search function, it is possible to see calls in all search criterias and in the history, can be seen how much there has been incoming calls.

There is history information from all calls, as follows:
- To which number a customer's call came?
- Was the call answered?
- The number the call was made from?
- To which number the call was transferred?
- Who took the call?
- How long the caller waited before the answer?

More information can be seen, cy clicking the **Info** button.

The list is color coded and the **Call result** and **Waiting time** can be *green, yellow* or *red*.
**Green** = a good result
Yellow = an average result (e.g. a longer waiting time)
Red = a bad result (the call was not answered or the waiting time was too long)

9.1.3   BeneApp in mobile

BeneApp provides easy to use and feature rich BeneCloud voice channel management in Android and iOS smart phones. In addition to managing service pool voice queues, admin user may also set and control voice queue alarms and notification via mobile app. Possible notifiations are delivered as push notification to the mobile device.

BeneApp brings many benefits for end users too. For example user can handle availability by coupld of clicks, go available/offwork for voice channel and if needed handle service phone calls via mobile.
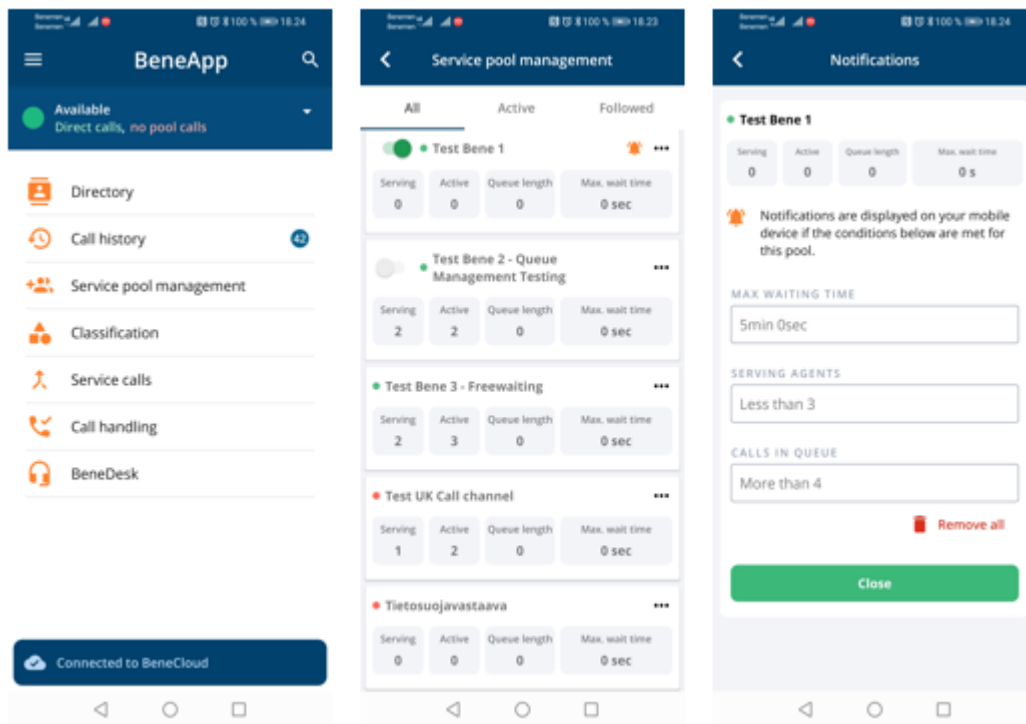
9.2   Dashboards and Reporting

9.2.1   Real-time monitoring dashboard

- Service pool voice queue real-time monitoring dashboard is available via BeneDesk Web
  https://discover.benedesk.com -> Service Pool Management.
  Selecting any queue will open more detailed view of the queue.
- The same is also available BeneDesk for Windows softphone UI, see chapter 7.1.2 for details

- Additonally Service calls tab can be used to see in more detail ongoing and recent service calls.
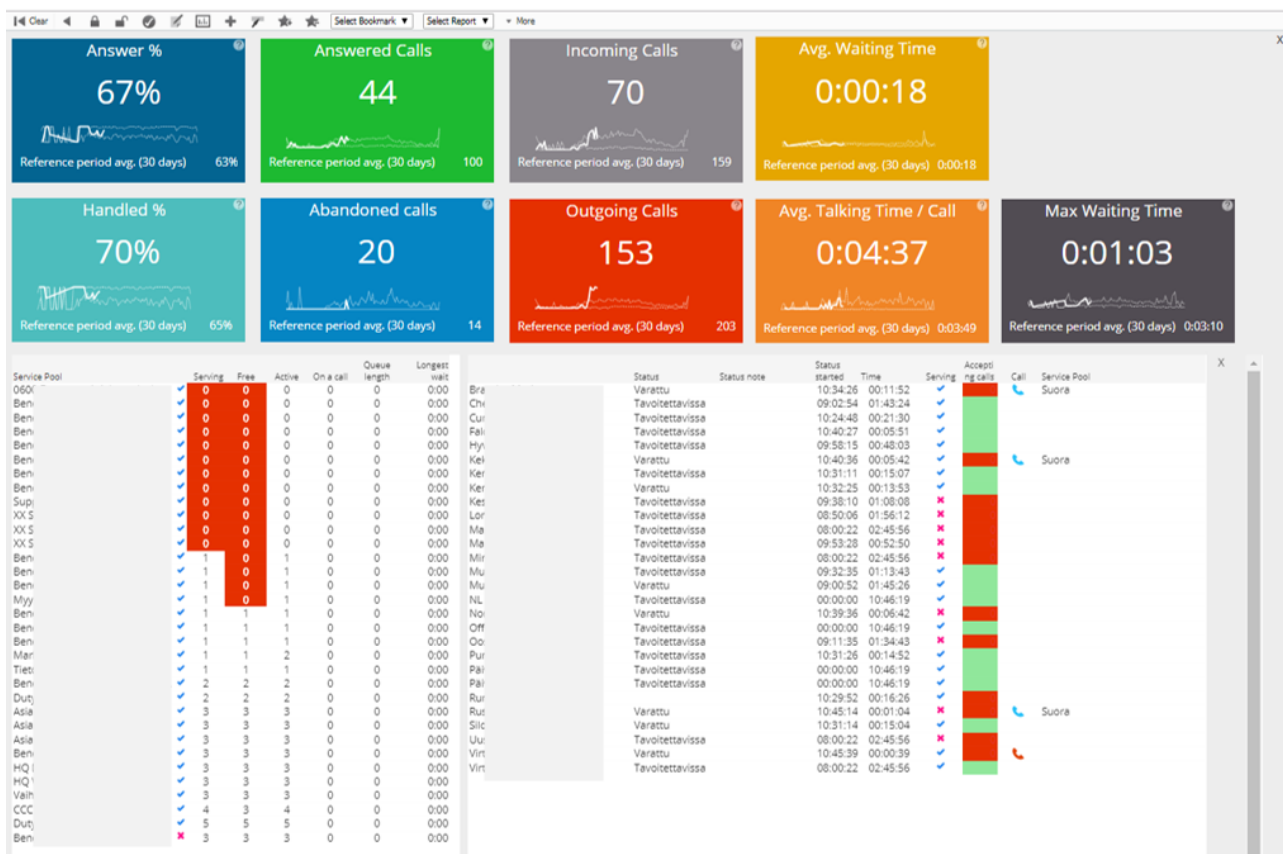- The same is also available BeneDesk for Windows softphone UI, see chapter 7.1.2 for details.


- More advanced real-time dashboards & info monitor views can be provided via BeneReports web reporting service and tool, if given service modules are purchased and configured for the customer. When configured, web based BeneReports tool can be accessed via BeneDesk web.

Saleforce Omni Supervisor

If Salesforce Omni-channel is in use, Omni Supervisor is the main tool monitoring agent work, salesforce omni queues and agent availability. Assuming Omni-Channel availability integration is enabled, dashboard includes availability reporting for voice channel.
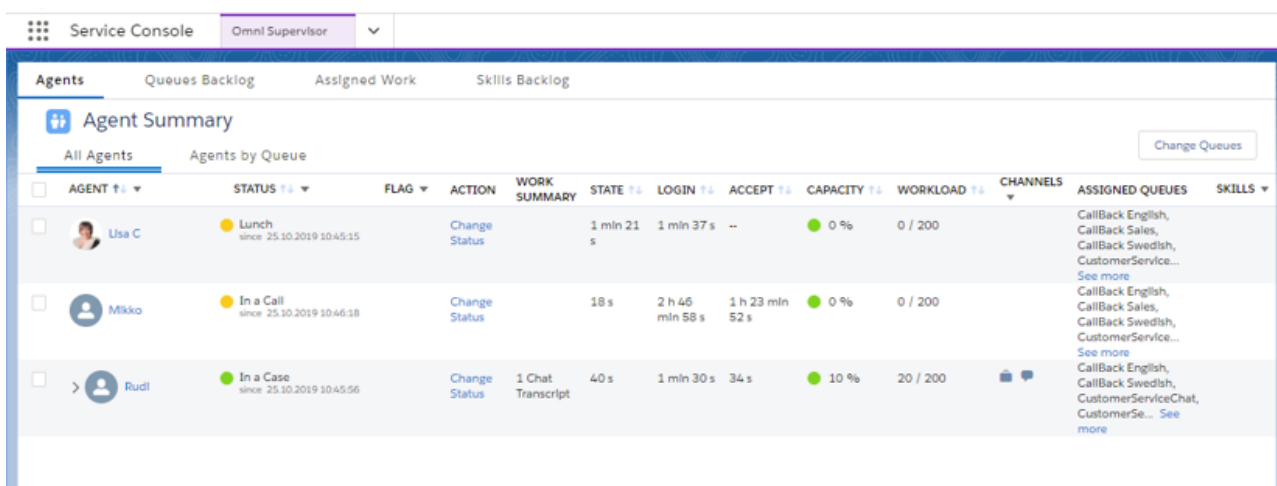
9.2.2   Reporting

Rich reporting capabilities can be provided via BeneReports online reporting service and Salesforce reporting & dashboards modules

BeneReports online reporting service

Provides detailed direct phone call, service call and call center reporting. When purchased and configured for the customer, web based reporting tool is accessed via BeneDesk web by users / admins with reporting manager rights.
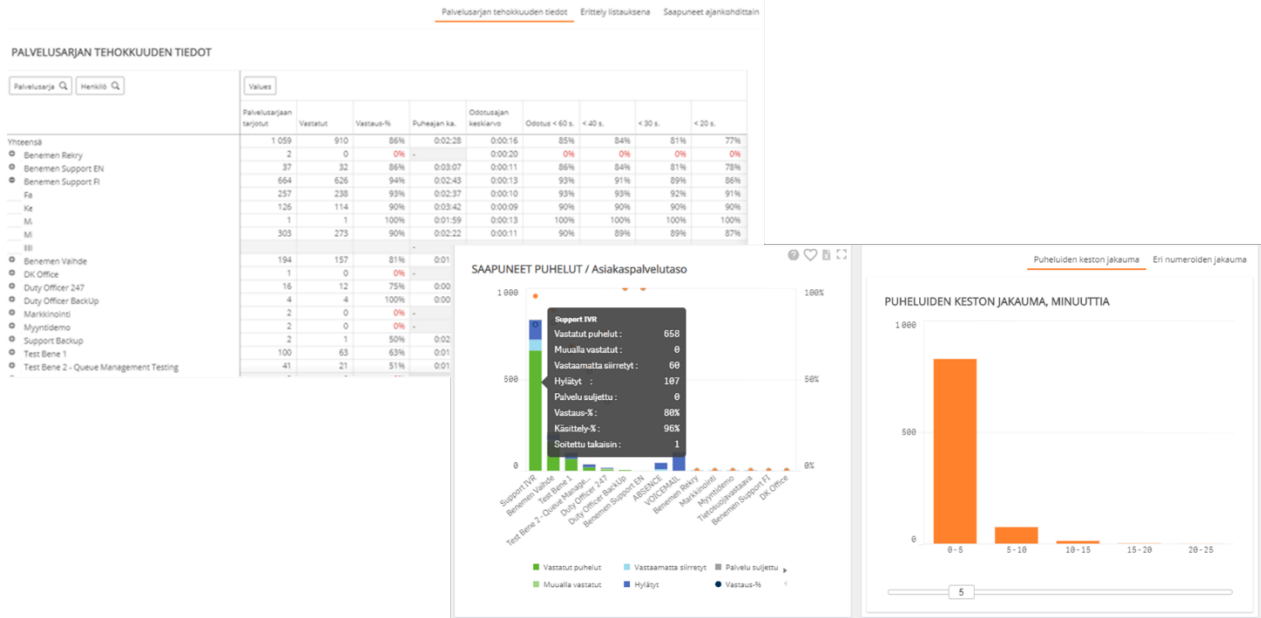
Salesforce Reports & Dashboards

Provides detailed reports for all the agent work and activities done via Salesforce. All the saved call tasks activities, call details and phone originated case data are available for Salesforce report creation. Additionally with Omni-Channel availability integration user presence reports will include agent availability reporting for voice channel too.