ENREACH FOR SALESFORCE SERVICE CLOUD VOICE

Configuration guide

Version 1.0

Contents
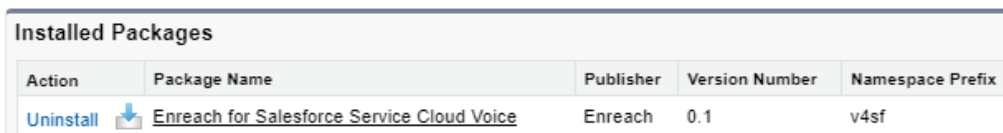
1 Managed package installation and configuration

The guide applies to Enreach for Salesforce Service Cloud Voice product version 0.4 or newer.

1.1 Installation Prerequisites

- My Domain must be enabled;
  https://help.salesforce.com/articleView?id=domain_name_overview.htm&type=5
- Enable Salesforce Omni-Channel settings;
  https://help.salesforce.com/articleView?id=omnichannel_enable.htm&type=5
- Salesforce org must have Salesforce Service Cloud Voice licenses available

1.2 Install managed package to Salesforce org

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

   Keep 'Install for Admins only' selected -> Click 'Install'

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

Installed Packages				
Action	Package Name	Publisher	Version Number	Namespace Prefix
Uninstall	Enreach for Salesforce Service Cloud Voice	Enreach	0.1	v4sf

1.3 Whitelisting Salesforce org package URL in Enreach cloud

Please inform Enreach team about your Salesforce org. specific package url. Please note this is unique for each Salesforce org.

1) Obtain URL by going to Setup -> Visualforce Pages
2) Find and open 'EnreachWebRTCLogin' and click Preview
3) On Preview browser page copy URL ending force.com (do not copy the last part /apex/EnreachWebRTCLogin)
   Example: https://enreachdemo1--v4sf.vf.force.com
4) Provide URL to Enreach team

Other installation and configuration steps may continue, but user will not be able to login to Omni-Channel phone UI without Enreach whitelisting the Salesforce org package url.

1.4   Enable Service Cloud Voice

a. Go to Setup -> Partner Telephony Setup
b. Enable Service Cloud Voice

1.5   Admin Permission Set assignment

In order to continue configuration steps, please add admin user at minimum to the following permission set:

- Contact Center Admin (Partner Telephony)
- Enreach Partner Telephony Admin

If you want to enable the same user account also as Agent, then add user also to the following permission sets:

- Contact Center Agent (Partner Telephony)
- Enreach Partner Telephony Agent

1.6   Create Contact Center

Note: this step requires that you have received xml configuration file from Enreach and it's available for admin user completing configuration steps.

a. Start by creating Enreach Partner Telephony config xml file
b. Go to Setup -> Static Resources
c. Click 'EnreachPartnerTelephonyConfig' -> click 'View file'
d. Copy all the text (starting <callCenter> and ending </callCenter>) and save it on computer as .xml file.
e. Go to Setup -> Partner Telephony Setup
f. Click 'Create Contact Center'
g. On pop-up window select 'Enreach Partner Telephony' -> click Next
h. On new pop-up window click Upload XML file
i. Select xml configuration file you saved in step d. -> click Open
j. You should see notification that contact center was created

> ✅ The 'Enreach Partner Telephony' Contact Center was created. ✕

1.7 Add SCRT API url to Remote Site Settings

a. Go to Setup -> Remote Site Settings
b. New Remote Site
- Remote Site Name = <can be anything, doesn't allow whitespaces>
- Remote Site URL = https://<org_domain>.my.salesforce-scrt.com (replace <org domain> by your unique Salesforce org domain)
- Active = checked
c. Save

1.8 Add Enreach Discovery url to Remote Site Settings

a. Go to Setup -> Remote Site Settings
b. New Remote Site
- Remote Site Name = <can be anything, doesn't allow whitespaces>
- Remote Site URL = https://discover.enrechvoice.com (unless different provided by Enreach)
- Active = checked
c. Save

1.9 Create and assign Self-Signed Certificate to Enreach SCV contact center

a. Go to Setup -> Certificate and Key Management
b. Click Create Self-Signed Certificate
- Label = <can be anything>
- Unique Name = **Enreach_SCRT_Certificate** **(this is hard coded and must be as provided)**
- Key size = 2048
- Exportable Private Key = checked and enabled
c. On newly created self-sigend certificate view, click 'Download Certificate'
- Open downloaded certificate file on your computer using some text editor e.g. Notepad
- Copy full certificate details on your clipboard (including -----BEGIN CERTIFICATE----- and -----END CERTIFICATE----- strings)
d. Go to Setup -> Partner Telephony Contact Conters -> click to open 'Enreach Partner Telephony'
e. On contact center details view click 'Edit'
f. Empty all the existing text in 'Public key' text box and paste full certificate details from your clipboard to it

g. Click Save

1.10 Configure Voice Extension

1. Go to Setup -> Partner Telephony Contact Conters -> click to open 'Enreach Partner Telephony'
2. On contact center details view click 'Edit'
3. In Voice Extension select 'Enreach Voice Extension' and ensure 'Always Show Voice Extension' is checked

Voice Extension ⓘ

Enreach Voice Extension

Always Show Voice Extension ⓘ

☑ Let the Voice extension always show in the call control extension for this telephony provider.

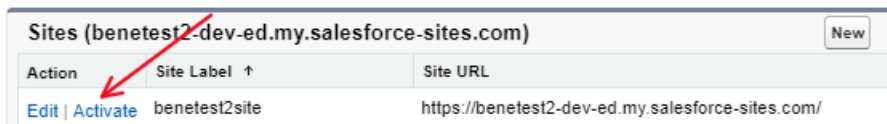## 1.11 Create Salesforce site for Enreach API connectivity

There are two options creating public site.

- The recommended option is to create dedicated public site, which is used only for Enreach API connectivity purposes
- Some of the existing sites can be used as aswell, but Site limits should be considered.
- Site Limits, each request to Salesforce endpoint will consume the following limits of the site:
  - Service request time (per rolling 24-hour period per site) - time which a request took will be counted to this limit
  - Page views - each request is treated as 1 page view

1) Go to Setup > User Interface > Sites and Domains > Sites and click New.

2) Set the name and keep default settings. For the site home page you can define any of the existing templates as this is not relevant with our process.

3) Click Activate

| Sites (benetest2-dev-ed.my.salesforce-sites.com)		New
Action	**Site Label** ↑	**Site URL**
Edit | Activate	benetest2site	https://benetest2-dev-ed.my.salesforce-sites.com/

4) Copy the created site url and provide it to Enreach. This site url is used by Enreach at Enreach cloud side as webhook endpoint URL.

E.g. https://<customersitename>.my.salesforce-sites.com/enreachscv/

Note: technically the overall url is appended by the following when contacted by Enreach cloud: /services/apexrest/v4sf/callevent/

5) The next action is to connect the created site with required managed package components.

Go to Setup > User Interface > Sites and Domains > Sites and select the appropriate site:
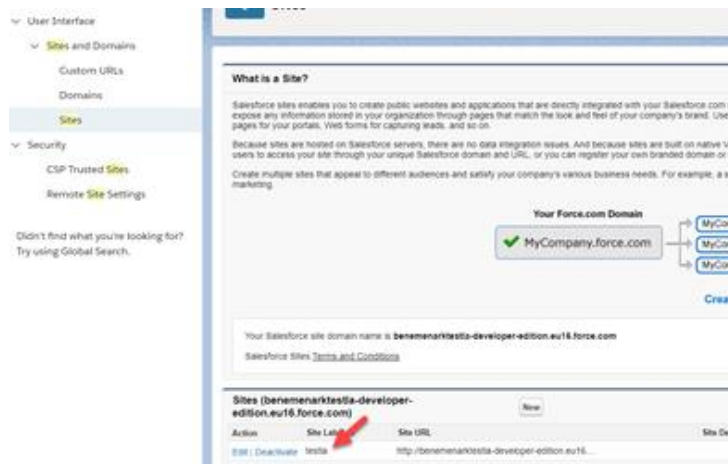
a) Click 'Public Access Settings'
b) Click 'Apex Class Access'
c) Click Edit and find v4sf.CallEventRestResource on Available Apex Classes list and click 'Add' to move it to 'Enabled Apex Classes'
d) Click 'Save'
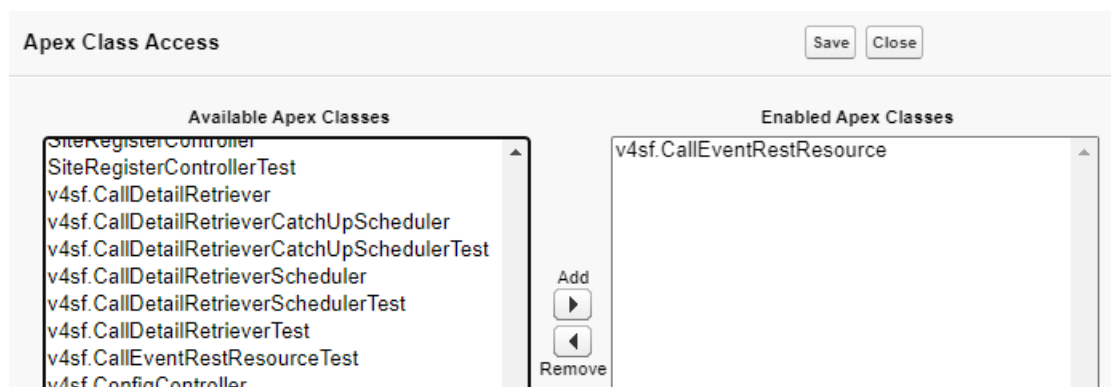
e) Back on site's profile page, click Object Settings
f) Find and click 'Integration Events' object (v4sf_IntegrationEvent__c)
g) Click 'Edit'. Enable Read and Create Object permissions and Edit access to all the fieds.
h) Click 'Save'

Profile Overview > Object Settings ▼ **Integration Events** ▼

Integration Events [Edit]

Tab Settings

Tab Hidden

Record Types and Page Layout Assignments

Record Types	Page Layout Assignment
--Master--	Integration Event Layout

Object Permissions

Permission Name	Enabled
Read	☑
Create	☑
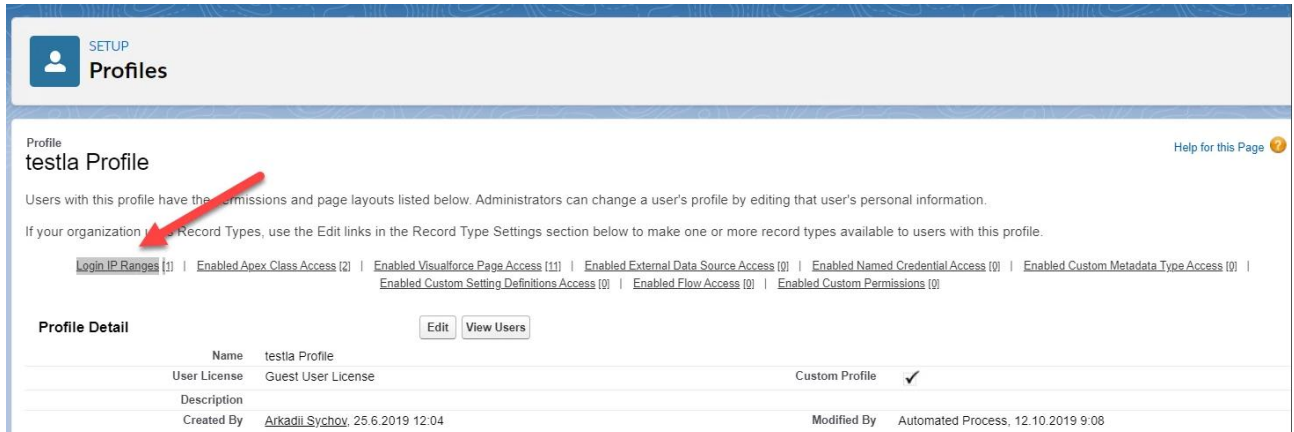
Field Permissions

Field Name	Field API Name	Read Access	Edit Access
Call Id	v4sf__CallId__c	☑	☑
Created By	CreatedById	☑	☐
Event Data	v4sf__EventData__c	☑	☑
Event Type	v4sf__EventType__c	☑	☑
Last Modified By	LastModifiedById	☑	☐
Name	Name	☑	☑
Owner	OwnerId	☑	☑
Status	v4sf__Status__c	☑	☑
Status Message	v4sf__StatusMessage__c	☑	☑
Sync Attempt Count	v4sf__SyncAttemptCount__c	☑	☑

Optional - Configuring Login IP Ranges restriction

It is possible to activate Login IP Ranges restriction for the Public Site guest user. It allows to accept and process requests from the client in the configured IP address range only. Please follow the instructions below to configure it.

    a. Network traffic must be allowed from EnreachVoice networks:
80.88.186.0/24 (80.88.186.0 – 88.88.186.255)
80.88.187.0/24 (80.88.187.0 – 88.88.187.255)

    b. Go to Setup > User Interface > Sites and Domains > Sites and select the appropriate site. Important point: the site should be used for Smart Routing functionality only, to not impact functionality of other sites.

    c. Click 'Public Access Settings'.

    d. Click 'Login IP Ranges'.

e. Click 'new' button.

f. Set the IP address range received from Enreach, and click 'Save'.

1.12 Enreach SCV Configuration – Tenant Configuration

1. As an Enreach SCV admin go to App Launcher, search and open 'Enreach SCV Configuration' app

2. Click edit and fill in 'Voice API Discovery URL'

- The url is https://discover.enreachvoice.com unless otherwise instructed by Enreach

3. Fill in 'Voice API System Username' (provided by Enreach)

4. Click 'Save'

5. Tenant configuration, click 'Fetch URL'.

- Copy 'Voice API Url' and add it to 'Salesforce Setup -> Remote Site Settings' before continuing to the next step

6. Tenant configuration, click 'Get the Key'. Pop-up window opens up. Insert password for Voice API system user account. Click 'Submit'

7. Tenant configuration, click 'Set the Key'. Pop-up window opens, define and insert 'Webhook API Key' and click Submit. Customer creates this shared secret and provides it to the Enreach.

8. 'Post Call Data Retrieval – Create Voice Calls on not identified contact' is optional setting. Please consider the below before activating the functionality.

This applies to automated voice call record creation for the direct phone calls handled outside of Salesforce Omni-Channel phone. (E.g. mobile). Default requirement is that there must be at least one Salesforce contact record with customer phone number AND phone call privacy must be set to 'Work' on Enreach cloud side. Enabling this setting extends voice call record creation also to phone calls where Salesforce contact doesn't exist with the customer phone number.

1.13 Enreach SCV Configuration – Scheduled Jobs

Post Call Data Retrieval
Post Call Data Retrieval is used to update rich call details into all the Salesforce Omni-channel phone handled and created voice call records. E.g. call recording listening via Salesforce audio call player, and later post-call transcription.

Post call data retrieval also creates new voice call records for phone calls which are handled outside of Salesforce Omni-channel phone (e.g. mobile). Default requirement is that there must be at least one Salesforce contact record with customer phone number AND phone call privacy must be set to 'Work' on Enreach cloud side. Currently functionality applies to direct call type.

'Start Job' to continuously monitor, create and update voice call records with the rich call details. Voice call records are created and updated max 1 minute after the phone call is ended

'Run Once' job can be used for testing and manual one time execution.

Catch Up Data Retrieval
Catch Up Data Retrieval is used as backup method for creating and updating voice call records.
'Start Job' to keep backup method continuously running. It monitors daily basis possible missed voice call records and creates and/or updates them accordingly
'Run Once' job can be used for testing and manual one time execution.

1.14 Add Enreach API URL to Trusted URLs

This is needed so that possible call recordings can be loaded and listened via Salesforce audio player.

1. Go to 'Enreach SCV Configuration' app and copy 'Voice API Url'
2. Then go to Setup -> Trusted URLs -> click 'New Trusted URL'
3. Fill in info as follows:
    - API Name field = can be anything (doesn't allow whitespaces)
    - URL field = paste copied 'Voice API Url'
    - Active = checked
    - CSP Context = All
    - CSP Directives = enough to select 'media-src (audio and video)'
4. Click Save

Note: After saving the configuration, please wait around 10 – 15 minutes before testing the first call recording listening.

1.15 Enable Control Call Recording for Agents

By default phone UI will not have recording button available for agents.

Please follow guidance here to enable recording button for agents.

Note: With the current release once enabled, recording button is visible for agents with all the phone calls. However, it currently assumes that phone call is by default recorded (set by Enreach voice core) and the button works for Pause and Resume recording actions. i.e. currently agent can't start call recording using the button.

a. Go to Setup - > Permission Sets
b. Click 'New'
   - o   Label = <can be anything e.g. Control Call Recording>
   - o   API Name = <can be anything unique, no whitespaces>
   - o   License = Service Cloud Voice User (Partner Telephony)
c. On newly create permission set, click 'App Permissions'
d. Enable 'Control Call Recording' permission and Save

e. Assign this permission set as part of the user configuration to agents which you want to be able to Pause / Resume call recording via phone UI

1.16 Create Enreach Voice user mapping field

By default user mapping between Salesforce org and Enreach voice cloud works automatically IF Salesforce user account's Email value is the same as Enreach voice user account's username value.

If the value of Email attribute is not matching between the systems, then additional mapping field is needed on Salesforce org side. This is typical e.g. with test and admin accounts when it might be impossible to match Email values.

Please follow the guidance in this chapter how to enable additional field for user mapping in Salesforce org side.

a. Go to Setup -> Object Manager -> User object -> Fields & Relationships
b. Add new 'Email' data type field
  o Field Label = EnreachUsername
  o Field Name = **EnreachUsername**
  (this is hard coded and must be as provided)
c. Assign created field to all the needed profiles and remember add it to your User page layout
d. EnreachUsername setting is now configurable to your User accounts. Fill in there user's Enreach Voice account username IF it's not the same as Salesforce user account's Email value.

Additional Information	
EnreachUsername	

1.17 Salesforce Omni-Channel configuration

Phone UI and availability in voice channel is controlled via Salesforce Omni-Channel utility item.

In order to user receive incoming phone calls, user must be logged in to Omni-Channel with online type of status which has Phone service channel added. (online type of status can include also other service channels)

All other type of Omni-Channel statuses will currently set user busy (offwork) type of status in voice channel and user will not be offered any incoming phone calls. User can still make outbound calls in such status.

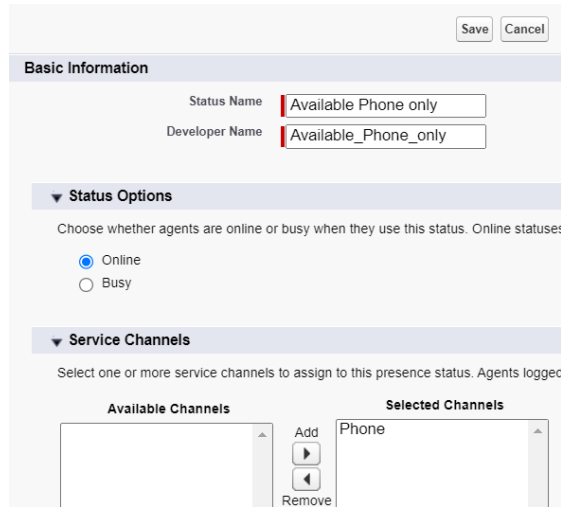### 1.17.1 Add Phone service channel and voice channel online presence status

a. Go to Setup -> Service Channels and ensure that you have Phone service channel created. If not, please create it.

Service Channels

« Back to List: Service Channels

Basic Information   Edit

Service Channel Name	Phone
Developer Name	sfdc_phone
Salesforce Object	Voice Call
Custom Console Footer Component	
Minimize the Omni-Channel widget when work is accepted	✓
Automatically accept work requests	☐

b. Go to Setup -> Presence Statuses
c. Ensure that you have Phone service channel added to all the wanted Online type of presences statuses, where you want that user is offered incoming phone calls
  o Example:

d. Remember assign all the wanted presence statuses to user profiles

1.17.2 Add Omni-Channel utility item to wanted lightning console applications

a. Go to Setup -> App Manager
b. Edit wanted lightning console application
c. Click Utility Items -> click New Utility Item
d. Select Omni-Channel and Save

2 Enreach Service Cloud Voice – Enable Agents

Please follow guidance on this chapter to enable your users for Enreach for Salesforce Service Cloud Voice solution.

Pre-requisites:

- Salesforce org. specific package url has been informed and whitelisted in Enreach cloud side of settings. This whitelisting is required for agent authentication to phone ui & voice channel. Please see Whitelisting Salesforce org package URL in Enreach cloud for details.
- User account is already configured and activated on Enreach voice cloud side
- Ensure that Salesforce user account is enabled for Salesforce Omni-channel and uses Salesforce console type of lightning application which has Omni-channel utility item added
- Ensure that user profiles has at least one presence status assigned, which is Online type and has (at least) Phone service channel added

2.1 Enable Enreach Service Cloud Voice for Salesforce user account

a. On Salesforce user account view go to Permission Set License Assignments -> Edit Assignments
b. Ensure the user account has 'Service Cloud Voice User (Partner Telephony)' assigned

c. Still on Salesforce user account view, go to Permission Set Assignments -> Edit Assignments
d. Add the following permission sets to user:
   - Contact Center Agent (Partner Telephony)
   - Enreach Partner Telephony Agent

Optionally, if you want to give user access to control call recording (pause & resume) as configured in 1.8 Enable Control Call Recording for Agents , then add also this permission set to the user

2.2   Enreach user account mapping

If Salesforce user account's Email value is the same as Enreach voice user account's username value, you can skip this configuration step.

If they are different, then

a. Go to Setup -> Users -> open wanted user account view -> Edit
b. Fill in Enreach user account username to EnreachUsername field and Save config

Additional Information

EnreachUsername

2.3   Enable user for Enreach Partner Telephony contact center

a. Go to Setup -> Partner Telephony Contact Centers and open Enreach Partner Telephony contact center
b. In Contact Center Users section click 'Add' to add wanted users

3   Current release V.0.4 functionality

Voice Call records

With Salesforce Service Cloud Voice design all phone calls are created as Voice Call object records. Voice Call object, record type, page layout and page is fully controlled by customer on Salesforce side. Enreach solution uses the design implemented on the Salesforce side and assigned to the given user and profile.

Currently voice call records are created in the Salesforce when phone call is offered to the user in Salesforce Omni-Channel phone, or user initiates outbound call in Salesforce.

Additionally Enreach for Service Cloud Voice solution enables automated voice call record creation into Salesforce from the end customer phone calls which are handled outside of Salesforce Omni-Channel phone, i.e. mobile calls. When functionality is

enabled, voice call records are created into Salesforce after phone call is ended (in maximum 1 minute).

Login to phone UI and voice channel

a. Open up console application with Omni-Channel utility item, the Omni-Channel utility item is automatically opened up and displaying Phone tab

b. When logging for the first time browser asks user to allow microphone usage. This must be enabled in order to phone ui to login and activate.
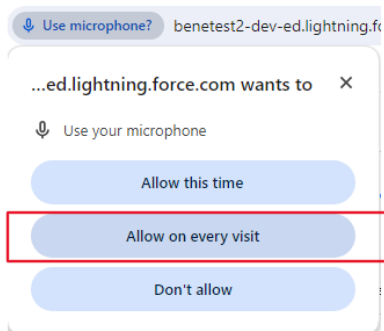

If the above pop-up is not appearing and Omni-Channel view reports 'Enable the microphone in your browser', please reload webpage and pop-up should appear.
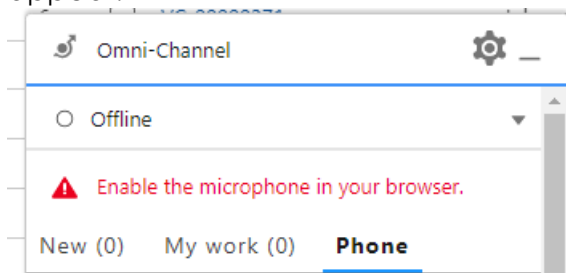
c. Click 'Login' button to start login
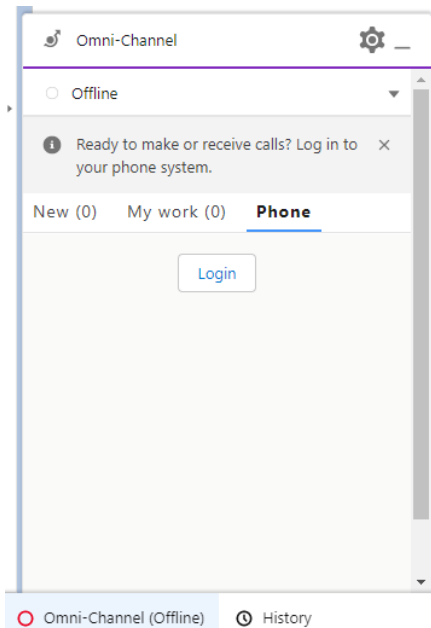
d. New login window will open up and guide user to authenticate using one of the below authentication method:

- o Customer's AzureAD SSO user credentials (this applies when AzureAD OpenID SSO integration has been configured between AzureAD and Enreach cloud)
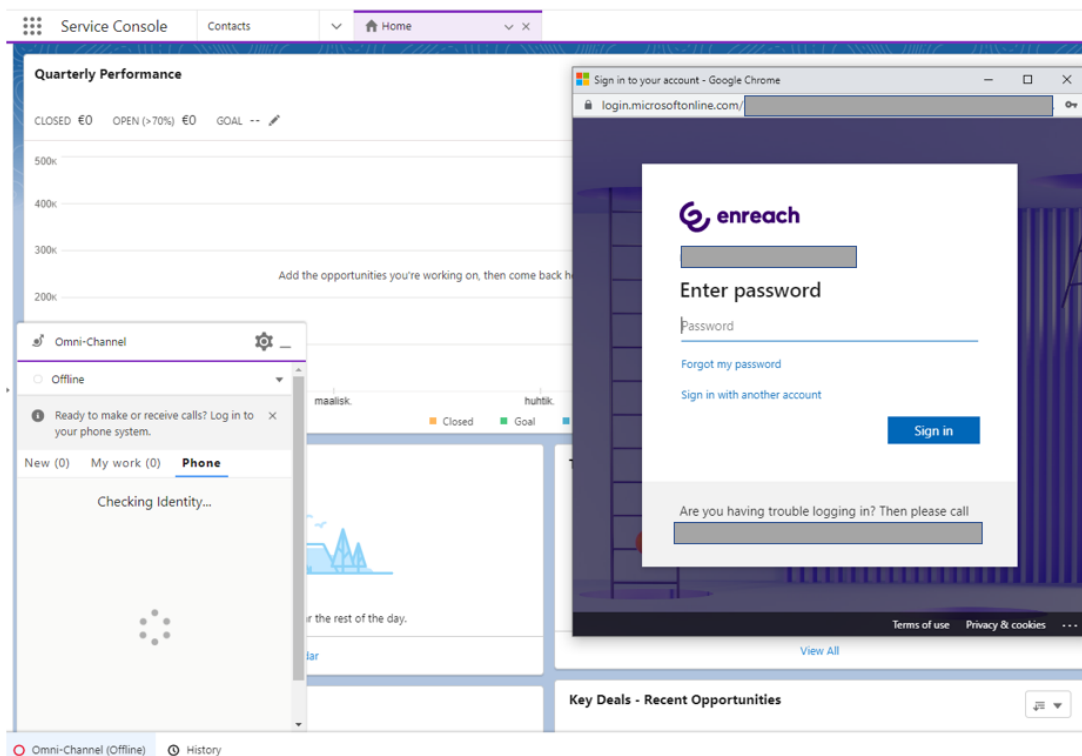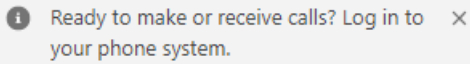

- o Enreach Identity local user credentials (all the other scenarios)
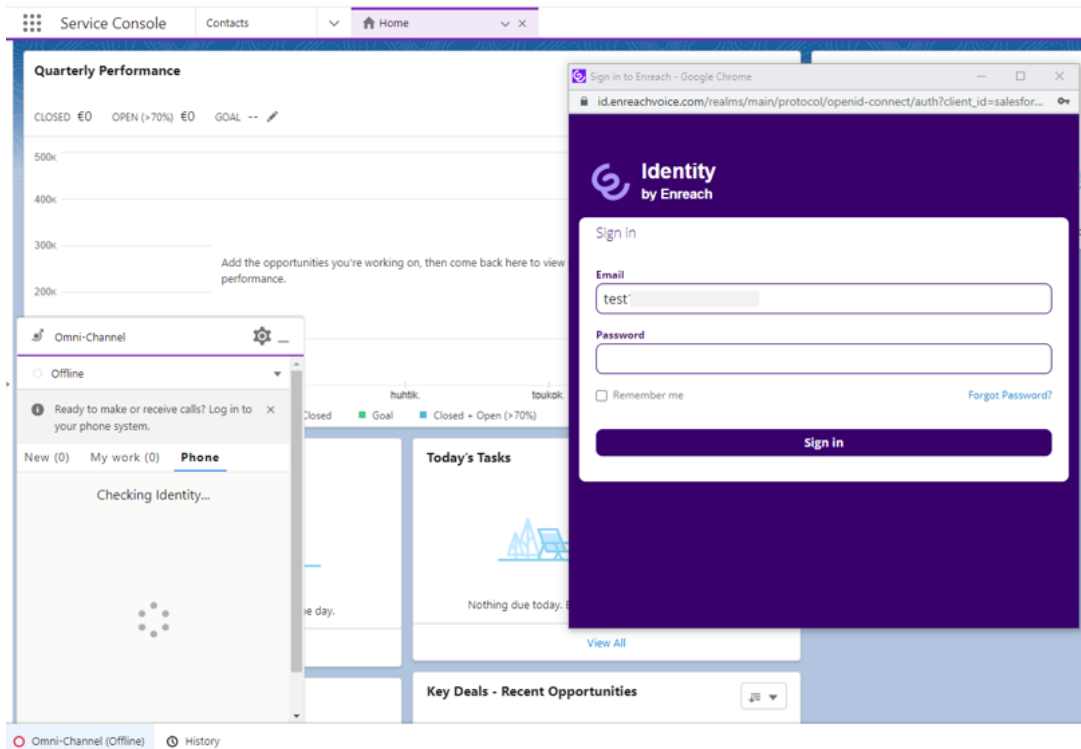
e. Once user completes authentication process, the phone ui is loaded. Note: if user has already logged in with the same identity in the browser session, then phone ui loaded without need to separately provide credentials (sso experience)

f. In order to receive incoming phone calls, user needs to login to Omni-Channel online type (green)type of presence status which has Phone service channel activated. For making outbound calls, user needs to login any other presence status than Offline.
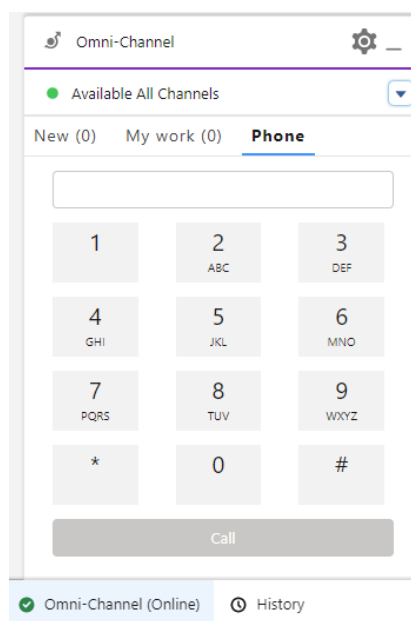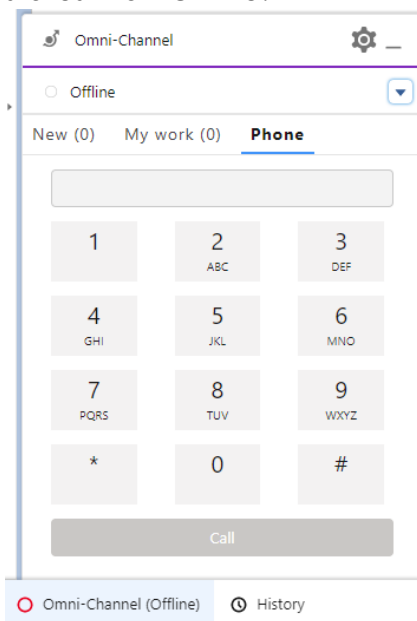
Note: phone ui may show the below notification also when user is logged in phone. If dialpad is loaded it means that user is logged in. User can safely close the notification.

> ⓘ Ready to make or receive calls? Log in to ✕
> your phone system.

Log out from phone UI and voice channel

With the current release user is logged out from voice channel always when user's Omni-Channel presence status is something else than online type (green) of presence status which has Phone service channel added. (Technically this sets user status to offwork in Enreach cloud side with status note: "Logged out with SF OmniChannel")

Note: The above design is currently in use, Salesforce Omni-Channel option 'Log out of Phone System' is not implemented.

Phone Call Handling

Links below take you to the official Salesforce Service Cloud Voice guidance pages on the each topic.

Answer and Make Calls

Add Callers or Transfer Calls
- Note: Merge button completes consulted transfer and agent itself is removed from the call

Pause and Resume Call Recording
- Requirement is that a phone call is being recorded, then an agent can pause and resume call recording during a phone call.
- Salesforce admin can control whether pause and resuming button is available for agents or not.

Listen to and Collaborate on Voice Call Recordings
- Functionality is available when call recording is enabled for the particular phone call and needed admin side configuration is completed on the system side.
- Additionally user who is accessing call audio player must have been authenticated to Omni-channel phone and have listening rights to the particular phone call recording on Enreach cloud side.

Configure Caller ID for Your Contact Center
- This is recommended way of activating caller identification based on caller's phone numbers
- Please note that this is based on End User records (MessagingEndUser object) and you should implement Salesforce flow or other Salesforce side automation

method to create and map your existing contact and account records with End
User Object
- One method of bringing this visible on the Voice Call record page, is to add
Related Record with Lookup Field 'End User -> Contact' tile on the record pag
- There is alternative way of doing linking, although not recommended
  o Link Calls with Customer Contact Records
  o Requires that Salesforce admin completes Channel-Object Linking
    configuration:
    https://help.salesforce.com/s/articleView?id=sf.voice_setup_org_config.htm&type=5

Take Notes on a Call

Omni-Channel Phonebook

On top of native Salesforce resources, Omni-Channel phonebook includes default
Enreach phonebook. This extends visibility of the collegues presence and enables easy
click-to-dial calling and call transfers to outside of Salesforce native resources and Omni-
channel presence.

For example if your back office personnel are part of Enreach company-wide voice
solution, but not necessarily using Salesforce for handling their phone calls, you can find
them in the phonebook and also see their current presence status in the voice solution. In
many cases user's mobile telephony and/or Microsoft Teams is connected with Enreach
cloud and then user can see also if colleague is in the mobile / Teams call or meeting.

Please note that Service Cloud Voice Omni-Channel is currently limited to display Online
(green) / Busy (yellow) / Offline (grey) presence statuses.
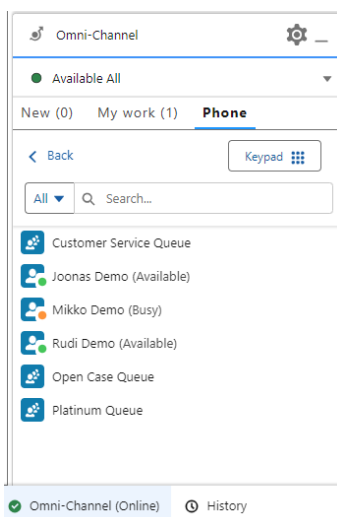
Omni-Channel phone UI – Voice extension

Service Cloud Voice allows additional voice extension view to be used for additional end user voice service capabilities.

With the current release, end user can use this to select outbound caller phone number what is then shown for phone call recipient. Selection of available phone numbers is handled on Enreach cloud side of configuration
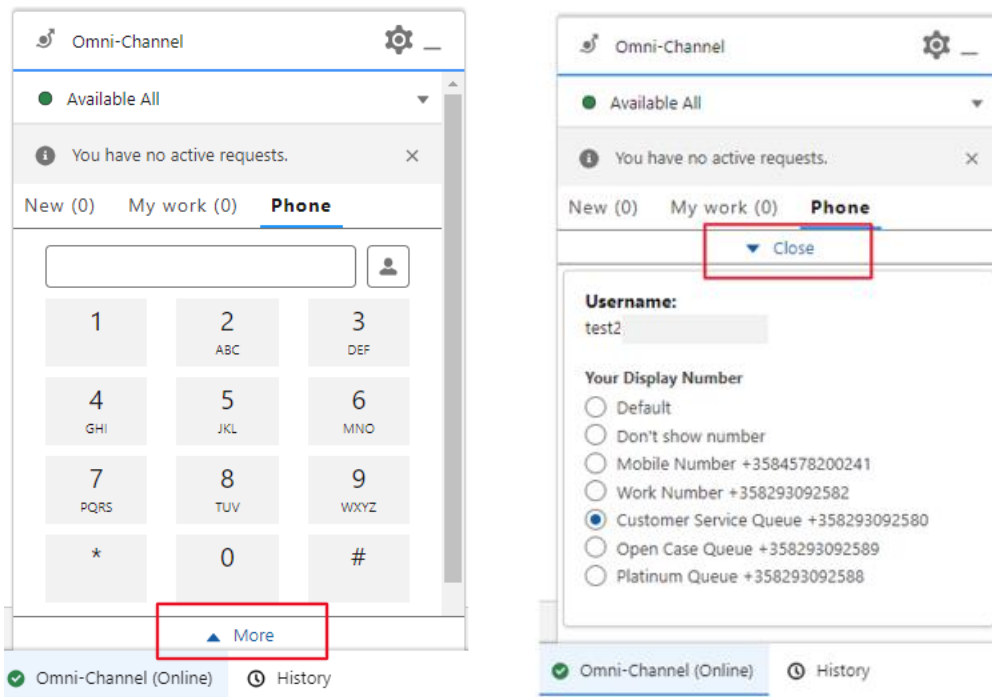
Call Transcription

Post-call speech-to-text transcription service is available via Enreach cloud for the following main languages sv-SE, fi-FI, en-GB/US, da-DK, nl-NL, de-DE, pl-PL, nb-NO, fr-FR , es-ES, but can be extended to dozens of additional languages. Post-call transcription is based on call recordings can be activated per voice queue and/or user account basis on Enreach cloud side.

Post-call transcriptions are automatically created right after the phone call is ended in Enreach cloud and available for integrations via Enreach API. Please consult Enreach on the process to get call transcriptions into Salesforce or other business solution for further processing and analysis.

Real-time speech-to-text transcription service is on the active roadmap and will be made available in later production releases.

Callback service integration and handling in Salesforce

Current service option to integrate Enreach cloud callback functionality with Salesforce.
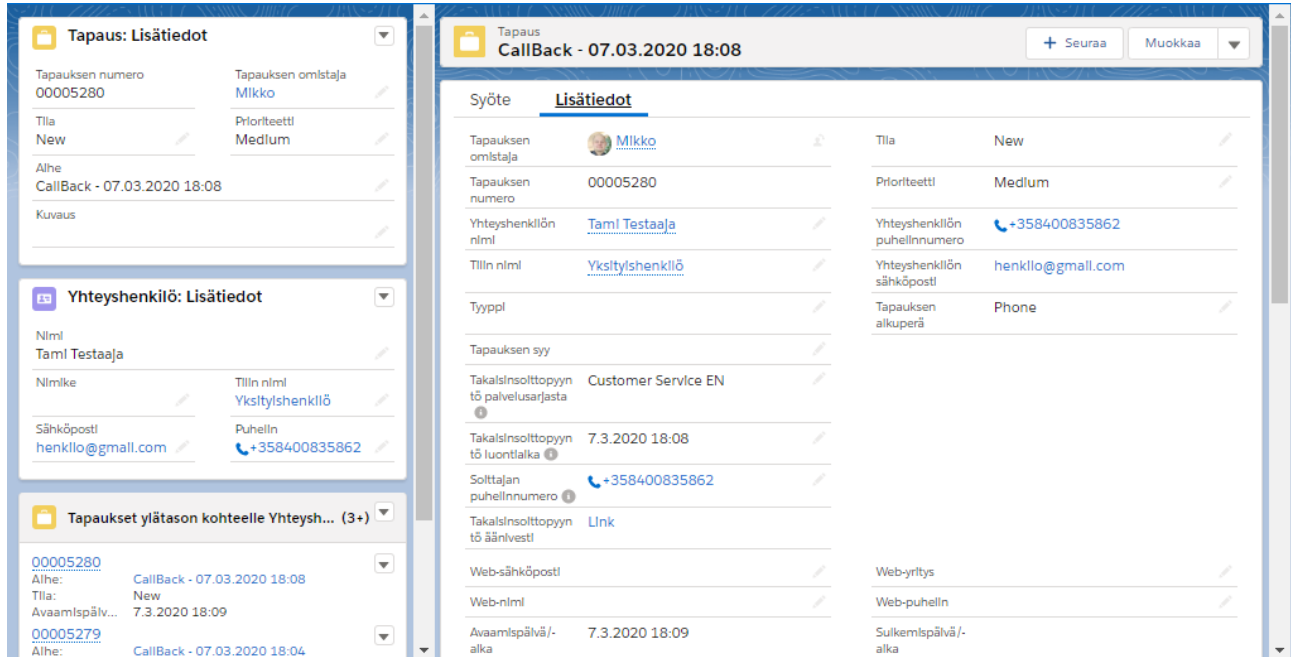
With this integration callback logic and service are implemented as standard service module at Enreach cloud side, but callback requests are fully handled in Salesforce.

- Integration can be activated on Enreach cloud callback list basis. Requires separate Voice for Salesforce managed package installation and configuration. Please see separate *Voice for Salesforce - Configuration guide* for details, requires manage package installation, Tenant configuration and Callback integration configuration
- Enreach callback service provides several different options how the callback option is offered to the caller. The most typical use model is that caller is informed about option to leave callback while queueing, but callback routine can be automated in many different ways i.e. as overflow option or if caller simply ends the call while queueing.
- As soon as customer leaves callback on Enreach cloud 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 Enreach cloud 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 Voice for Salesforce availability integration could be used here for realtime queueing and routing of callback cases.
- Voice for Salesforce 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
  - Callback Contact message , this can be used for hard coded system message on Enreach cloud side. E.g. if callback cases are created also for missed (abandoned) service calls, this field can include specific hard

coded message (i.e. 'Missed Call') to separate these from other type of callback cases.

- Standard Voice for Salesforce 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:

Smart Routing – Routing incoming service calls based on 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

Route calls to the right target based on customer information using Enreach Smart Routing engine

- Utilization of existing customer data in smart contact routing
  - Right service pools
  - Straight to the right person or department
- All existing data can be used
- Minimization of worthless contacts
- IVR passing
- Right resources – better quality
- Lower delay – better customer experience
- Accurate reporting
- Amount of handled contacts within shorter time
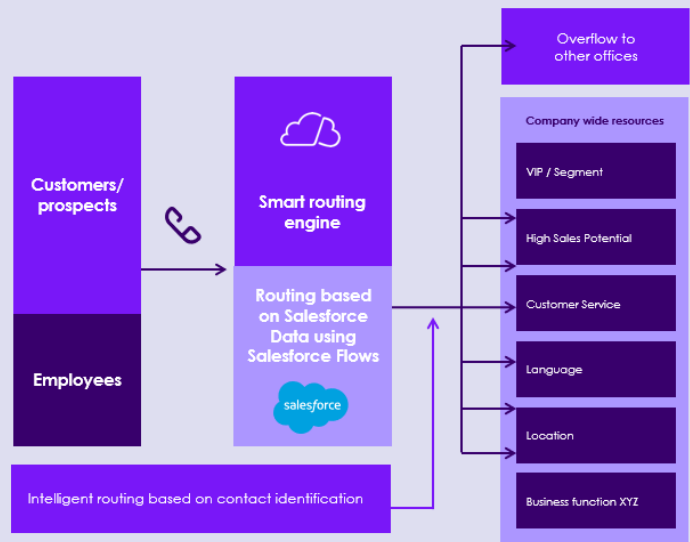
Smart Routing is typically activated on voice queues level and requires activation also at Enreach cloud configuration side. Requires separate Voice for Salesforce managed package installation and configuration. Enreach provides detailed implementation steps in a separate *Voice for Salesforce – Smart 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. Please consult Enreach for more details on the dynamic smart routing.

4 Enreach cloud management – general use cases

4.1   Voice service pool management
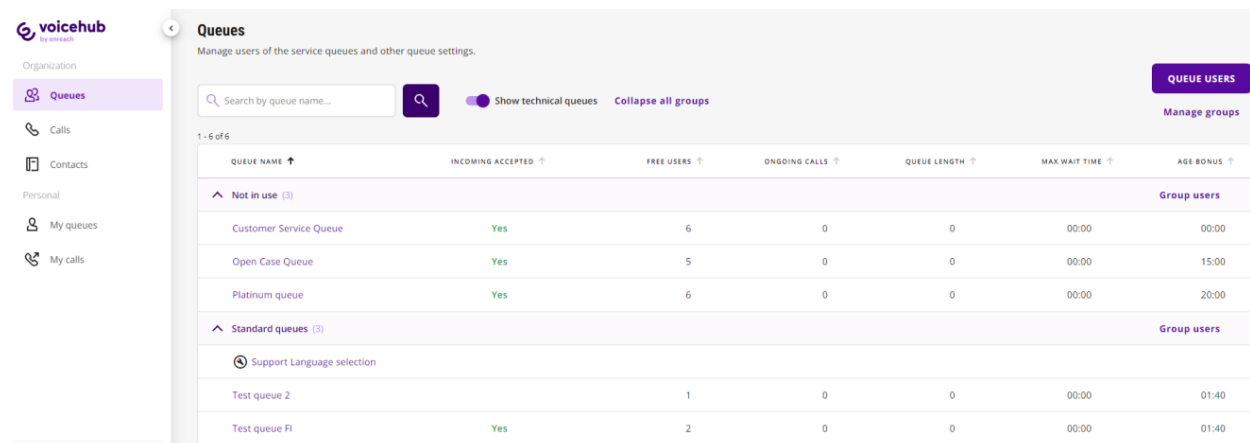
Voice queue management can be handled flexible from different endpoints.

Management capabilities require Enreach cloud Group Manager / Supervisor rights.

- Voice Hub web UI
  https://voicehub.enreachvoice.com
- Voice for iOS ja Android mobile app
  https://play.google.com/store/apps/details?id=com.benemen.beneapp&hl=en
  https://apps.apple.com/fi/app/beneapp/id989797121?l=en

4.1.1   Voice Hub Web UI

1. Login to https://voicehub.enreachvoice.com -> Queues 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 "Add Users" option to remove & add users in the queue
    c. Use "Settings" to modify voice queue workflow.

Online management view enables customer to manage all the new IVR and Voice queue workflows creation, including prompts (text-to-speech and audio file), timetables and callback services.

4.1.2 Voice for iOS and Android mobile app

Voice for iOS and Android provides easy to use and feature rich Enreach cloud 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.

Voice for iOS and Android 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.
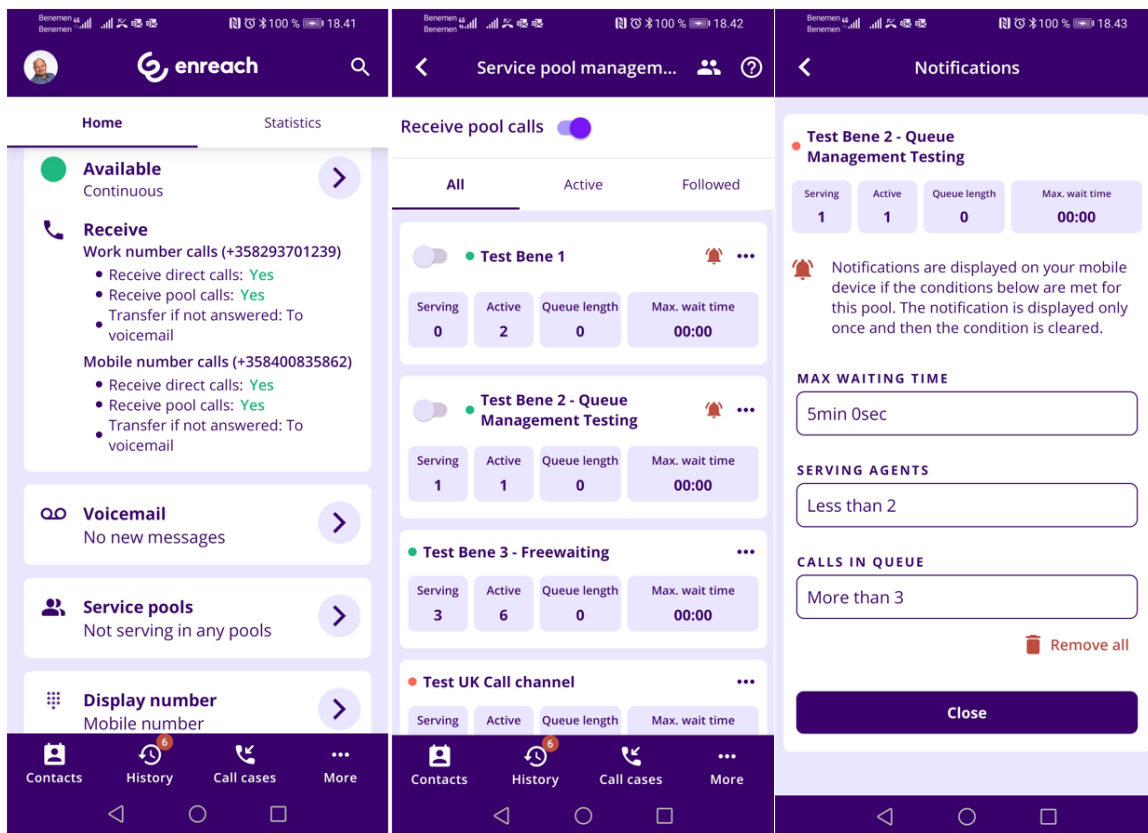
4.2 Dashboards and Reporting

4.2.1 Real-time monitoring dashboard

- Service pool voice queue real-time monitoring dashboard is available via Voice Hub web UI https://voicehub.enreachvoice.com -> Queues.
  Selecting any queue will open more detailed view of the queue.

- Additionally Calls tab can be used to see in more detail ongoing and recent service calls.

- More advanced real-time dashboards & info monitor views can be provided via Voice Analytics and/or Voice Monitor web reporting services and tools, if given service modules are purchased and configured for the customer. When configured, these online tools can be accessed via Voice Center web ui.
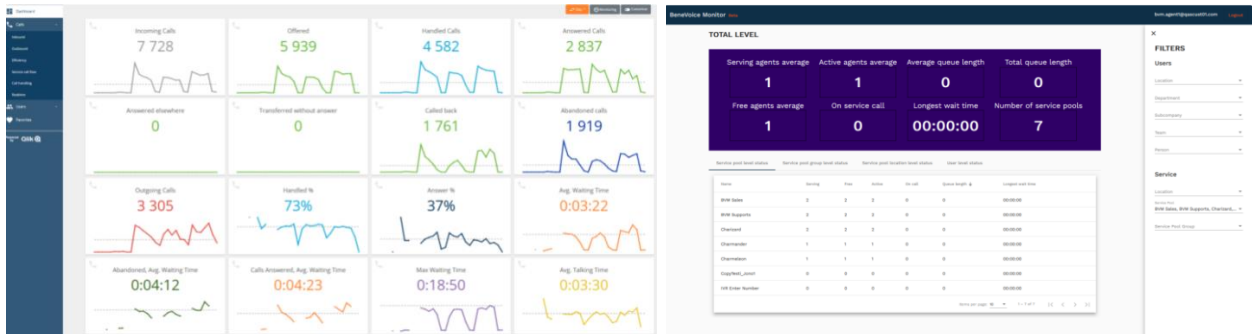
Saleforce Omni Supervisor

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.
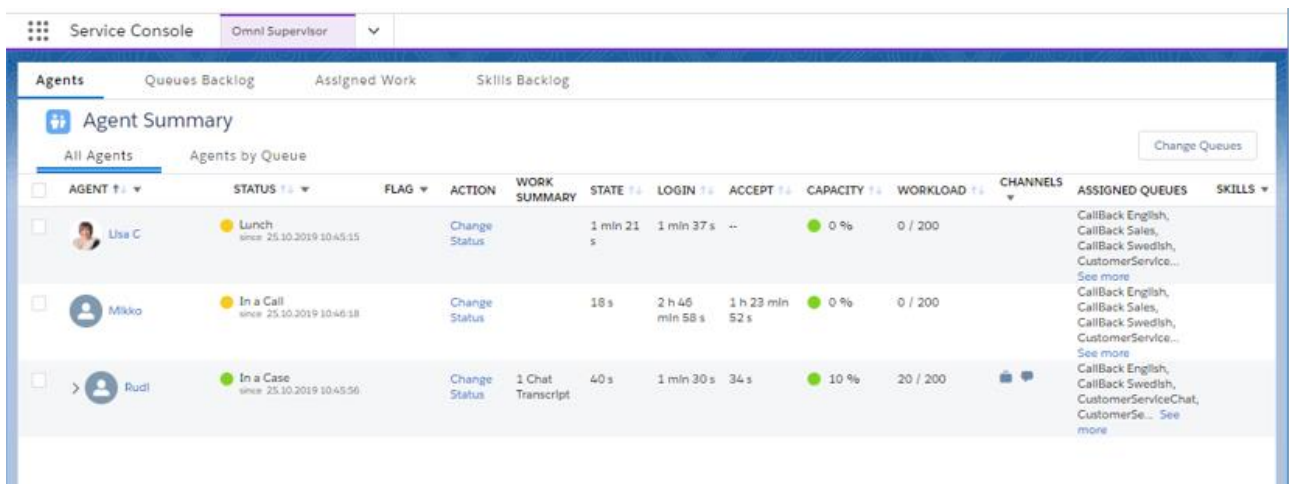

4.2.2   Reporting

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

Voice Analytics 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 Voice Center web UI by users / admins with reporting manager rights.
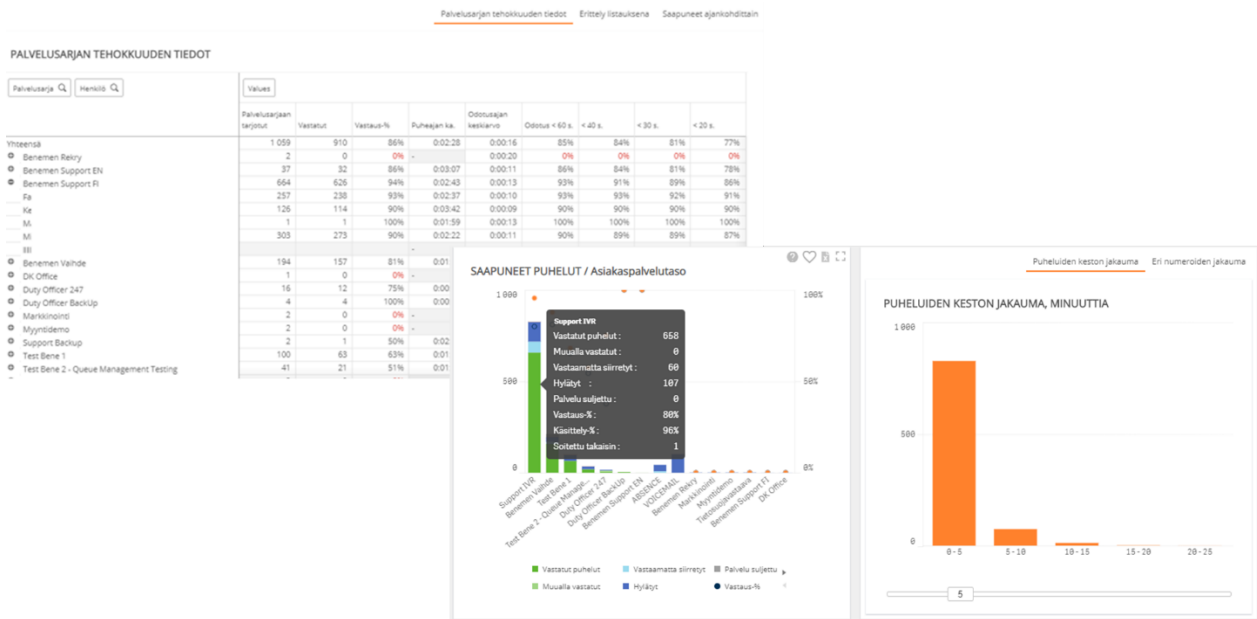
Salesforce Reports & Dashboards

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.