VOICE FOR SALESFORCE

BY ENREACH

Use Cases & Functionality

Version 1.54

Contents

1   Introduction

The purpose of the document is to describe use cases and functionalities of the Voice for Salesforce by Enreach (later Voice for Salesforce) solution starting from version 1.54. Please note that version 1.53 and higher requires use of Enreach Identity authentication for all the Voice for Salesforce end users.

1.1   Pre-requisities

- Enreach cloud user accounts must use Enreach Identity for user authentication. Please find Enreach Identity description here and check with Enreach team in advance if needed;
  https://benemen.atlassian.net/wiki/spaces/PD/pages/2425520243/Description+of+Enreach+Identity
  (If your Enreach user accounts are not using Enreach Identity then you must install Voice for Salesforce version 1.50.x and follow that guidance)
- Customer's Salesforce org and needed Lightning apps are activated for Voice for Salesforce usage
- End user is activated for both Salesforce org and Enreach cloud
- End user's Enreach cloud user role must include Voice for Salesforce web phone usage in order to use workstation based phone use cases
- Embedded Voice for Salesforce web phone in Salesforce is supported using Google Chrome web browser

1.2 User login to embedded web phone

1.2.1 Login

1) User logins as normal to Salesforce web user interface
2) User opens Salesforce lightning app, where also Voice for Salesforce utility item is activated.
3) Voice for Salesforce embedded webphone pops-up automatically when page is loaded.
4) If user haven't yet logged into webphone, user will see and must click "Login" button
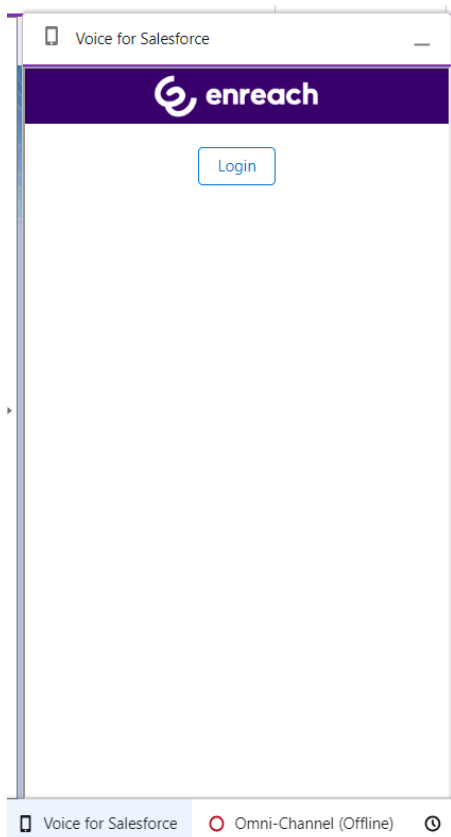
5) Typically user authentication is based on user's Microsoft work AzureAD credentials and dialog window will open asking user to authenticate by them. If user has already logged in the web browser session then phone will automatically login after clicking "Login" button. Example below:
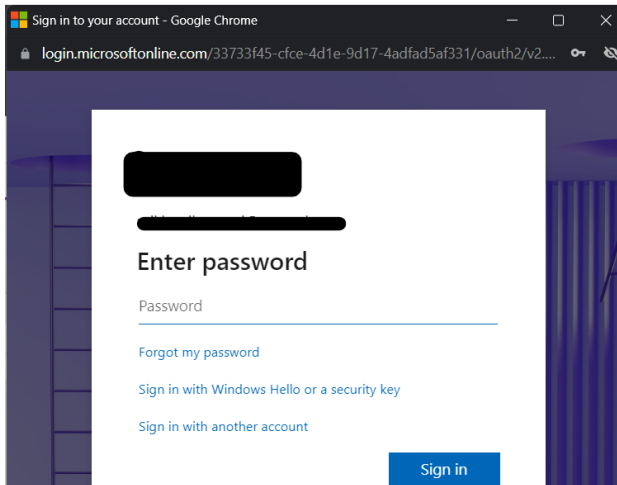
In some cases user organization may use separate login credentials provided by Enreach. In that case 'Identity by Enreach' login flow will pop-up asking user to login. Example below:
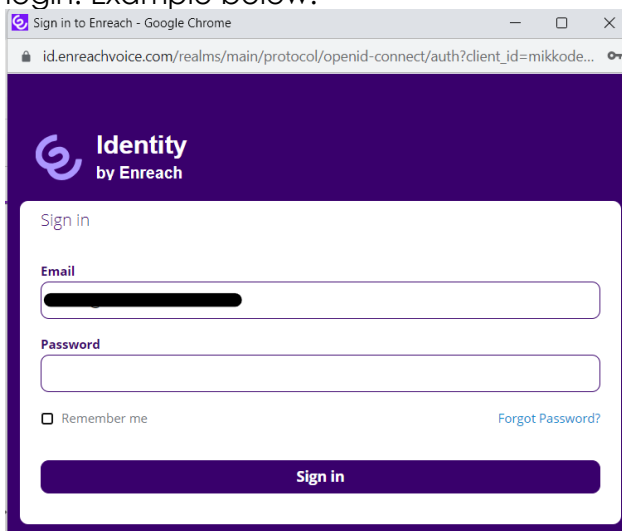
6) Please Please note that webphone will not activate unless microphone is allowed for the browser page. Typically this needs to be done once when logging for the first time with give web browser.

1.Web phone view asks user to enable microphone.
Click 'Enable microphone' link

2.Browser's notification pop-up opens up. Click ' Allow on every visit'

3.Click 'Continue' button and phone view will activate
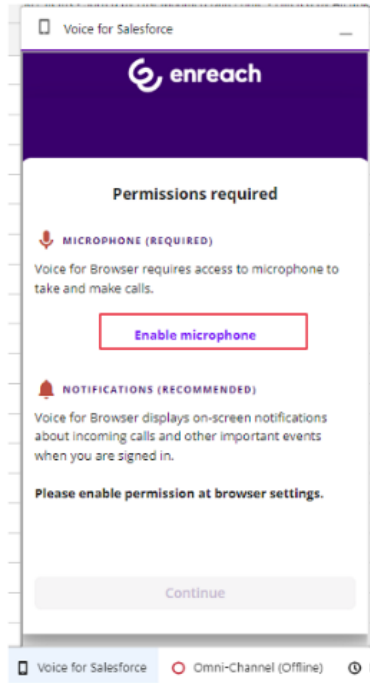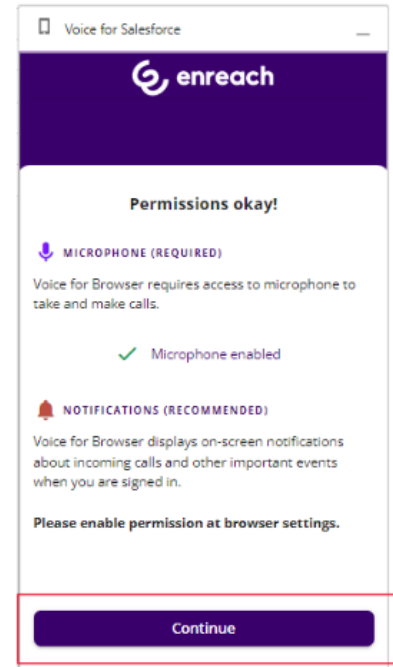

7) Voice for Salesforce web phone is used for controlling phone calls, managing voice channel availability status and caller phone numbers

1.2.2 Additional details
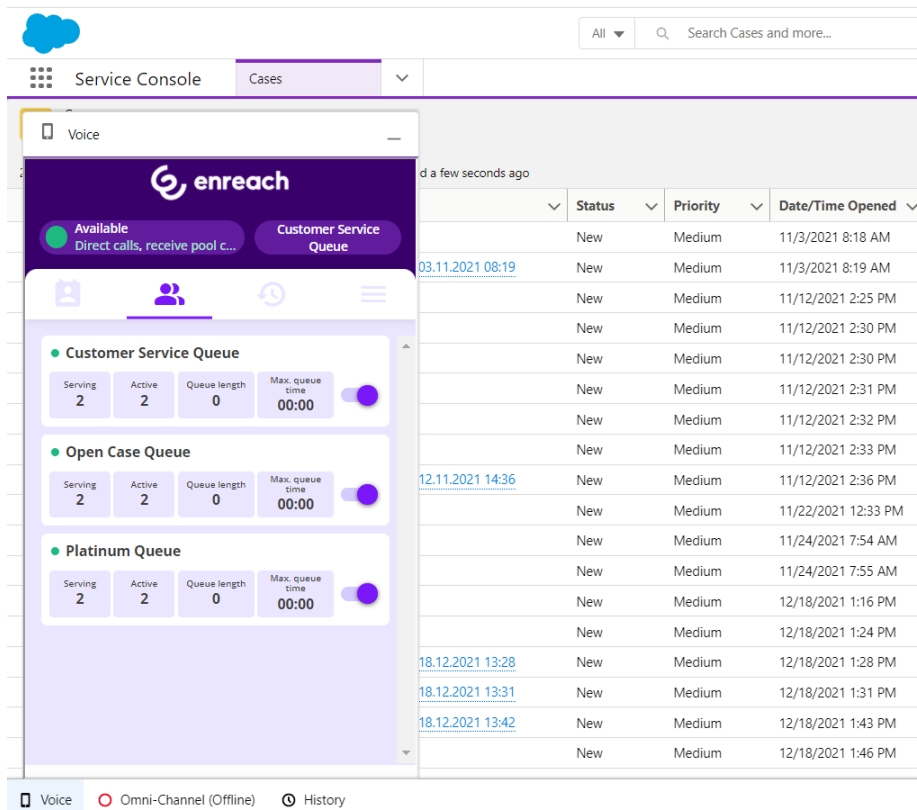
User login session stays active depending how company has configured their AzureAD authentication. If user during active session reloads browser page, phone is automatically logged in. If authentication has session has timed out / expired, then user will see 'Login' button in the web phone view. Clicking that will initiate login process as described in the previous chapter.

Please note that if user truly log out from their AzureAD authenticated session somewhere on that web browser session, then user is log out also from web phone.

Embedded webphone Menu tab includes option where user can log out from web phone. Mainly for above reasons this is disabled for Salesforce embedded web phone when using AzureAD authentication (will just show error page and user needs to reload browser page to load web phone again). If customer is authenticating using Enreach provided login credentials, then log out from web phone is available.

Important notes:

- Voice for Salesforce web phone shall be used in a single Salesforce browser view / tab, where new views and pages are opened within the same single browser view / tab. Console app is recommended for the best user experience.
- Avoid refreshing the whole browser view / tab. Instead, if you need refresh information on the active page, use built in Salesforce options doing so. This ensures that Voice for Salesforce web phone continues functioning as normal.
- If you refresh the whole browser view / tab during an active phone call, the call is disconnected.
- In case your webphone is not functioning or activating, then it's always good first reload the whole browser page
- Webphone will not login in Incognito/Private browsing state unless user has explicitly disabled "Block third-party cookies" setting.

1.2.2 Availability management

Enreach cloud voice service typically includes customer specific availability statuses, but they always follow the status types described in this chapter. User controls available statutes via Voice for Salesforce web phone. Depending on Enreach cloud user role, user may additionally be able to control availability on different voice channel service pools.

- Offwork
    - Not available to receive voice channel service pool calls
    - Available to receive direct calls (depending on user's call forwarding settings)
    - Able to make outbound phone calls
- Available
    - Available to receive voice channel service pool calls
    - Available to receive direct calls (depending on user's call forwarding settings)
    - Able to make outbound phone calls
- DND
    - Not available to receive voice channel service pool calls
    - Not available to receive direct calls (depending on user's call forwarding settings)
    - Able to make outbound phone calls
- Busy
    - Available to receive voice channel service pool calls

- o Available to receive direct calls (depending on user's call forwarding settings)
- o Able to make outbound phone calls

Note: If user is using Salesforce Omni-Channel and availability integration with Voice for Salesforce, then availability status is centrally managed via Salesforce Omni-Channel utility item. Please see 1.3 Omni-Channel Availability integration

1.3 Omni-Channel Availability integration

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. Note: User must also be active in Voice for Salesforce web phone in the same lightning app as Omni-Channel widget.

User logins to Salesforce omni-channel and voice queues via Salesforce Omni-Channel widget.
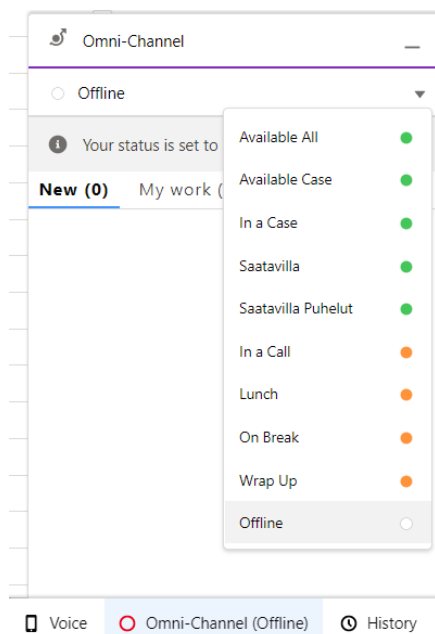
1.3.1 Omni-Channel login

- When user changes status from Offline to any other status, this activates user in the configured voice Enreach cloud voice queues and sets user Enreach cloud 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 Enreach cloud status to OffWork.
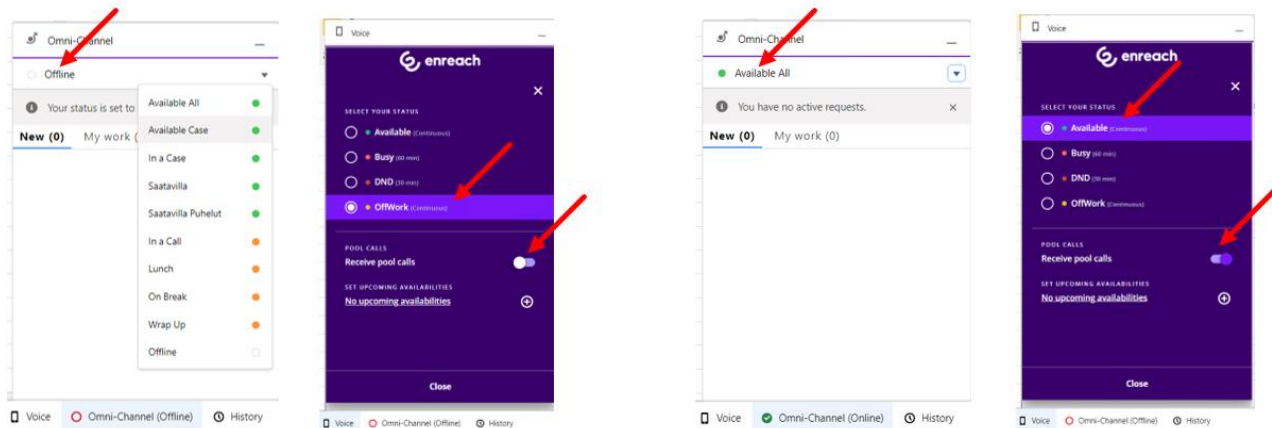
> - Going Offline from Enreach cloud voice queues works when user initiates this via Omni-channel widget
> - If user goes Offline in Omni-channel by any other reason e.g. closing browser, losing network connection, etc., this will not deactivate user in Enreach cloud voice queues.
> - In such a situation 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 Enreach UI's (Voice for Salesforce web phone, Voice for iOS/Android mobile app, Voice Center web ui)
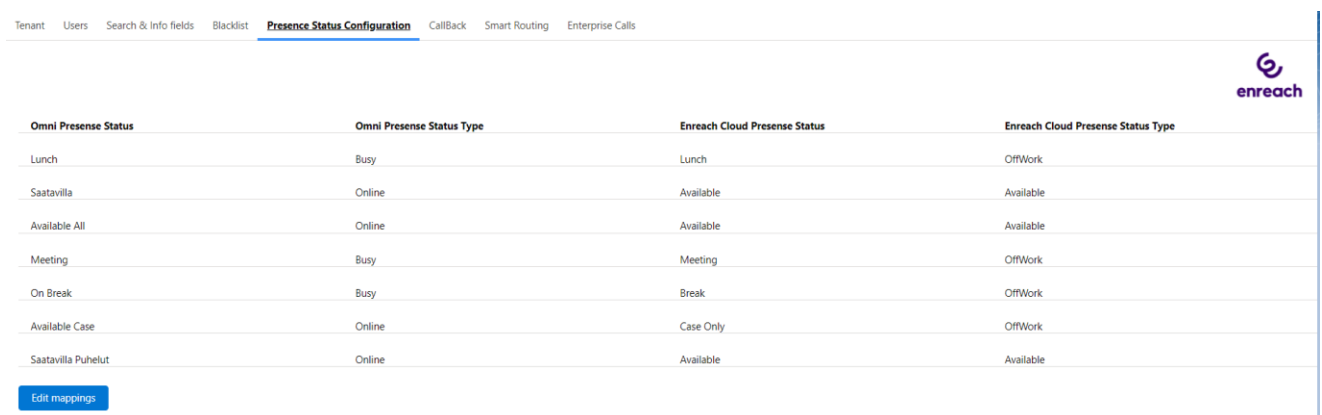
1.3.2   Omni-Channel Availability management

- 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 Enreach cloud voice channel.
- Examples:
  - If user goes Lunch status in Omni-channel, this will update Lunch offwork status also to Enreach cloud 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 Enreach cloud 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 web phone or user initiates outbound call, Omni-channel status is automatically changed to "In a Call" and user is busy in omni-channel
  - 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 Enreach cloud side.
- Below screenshot provides example how admin has mapped Salesforce Omni-Channel statuses towards Enreach cloud

Omni Presense Status	Omni Presense Status Type	Enreach Cloud Presense Status	Enreach Cloud Presense Status Type
Lunch	Busy	Lunch	OffWork
Saatavilla	Online	Available	Available
Available All	Online	Available	Available
Meeting	Busy	Meeting	OffWork
On Break	Busy	Break	OffWork
Available Case	Online	Case Only	OffWork
Saatavilla Puhelut	Online	Available	Available

Tenant   Users   Search & Info fields   Blacklist   **Presence Status Configuration**   CallBack   Smart Routing   Enterprise Calls

Edit mappings

## 1.4   Voice for Salesforce web phone

Web browser based softphone supported in Chrome browser.

General functionality:

- Voice for Salesforce web phone is based on WebRTC technology
- Make phone calls via web phone contact directory, keypad or call history
- Make phone calls via Salesforce view (click-to-dial)
- System level (outside of browser window) incoming call notification (requires that user has enabled browser page notifications)
- Answer, end and decline phone calls
- Selecting caller number for outbound phone calls
- Mute / Unmute microphone
- Hold / Unhold phone call
- Call transfer (direct transfer and consulted transfer)
- DTMF by keypad
- Caller identification from web phone contact directory and voice channel service pool queue name with receiving phone calls
- Availability status management
- Managing availability in voice channel service pool queues
- Voice channel service pool queue details dashboard

- Call history with in app call recording listening
- Call recording pause / resume (if activated by admin)
- Additional user settings are managed via Voice Center web UI and Voice for iOS and Android mobile apps

More detailed instructions via separate *Voice for Browser user guide* .
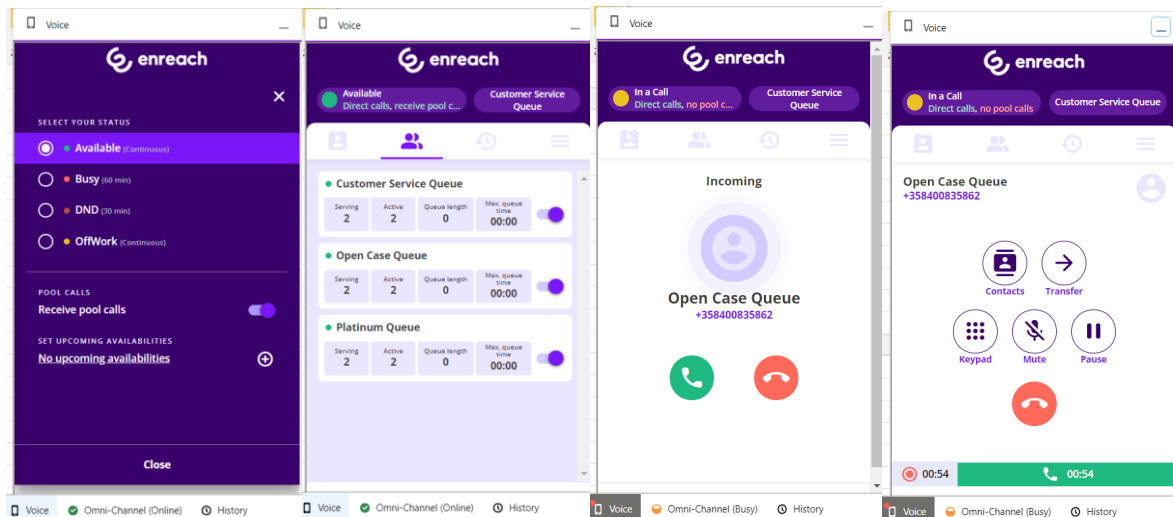
2 Phone workflows

Choice of 4 different phone workflows, which determine the action with inbound and outbound phone calls. Phone workflow is assigned by admin and can be done on a user basis.

- **Case**: Automated case creation without contact dialog. Creates automatically a new case when phone call is answered (both inbound & outbound calls) 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.

Phone workflow selection doesn't affect how actual phone call details are created into Salesforce. There are versatile additional user settings to handle which type of calls call activity (Task object) is created, is this done beginning of the call or when call is ended and should call activity be opened visible for user or not.

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 Voice for Salesforce configuration app as part of other user specific configuration items.

2.1 Case - phone workflow

2.1.1 Inbound call – Single identified customer

1. Phone call rings on web phone. Single identified customer 360-view is opened
   a. Wephone ui is automatically opened and if service pool queue call, then queue name is visible
   b. User answers / decline the call
2. When user answers the call, new Case is automatically created and opened. If user declined the call, then a case is not created
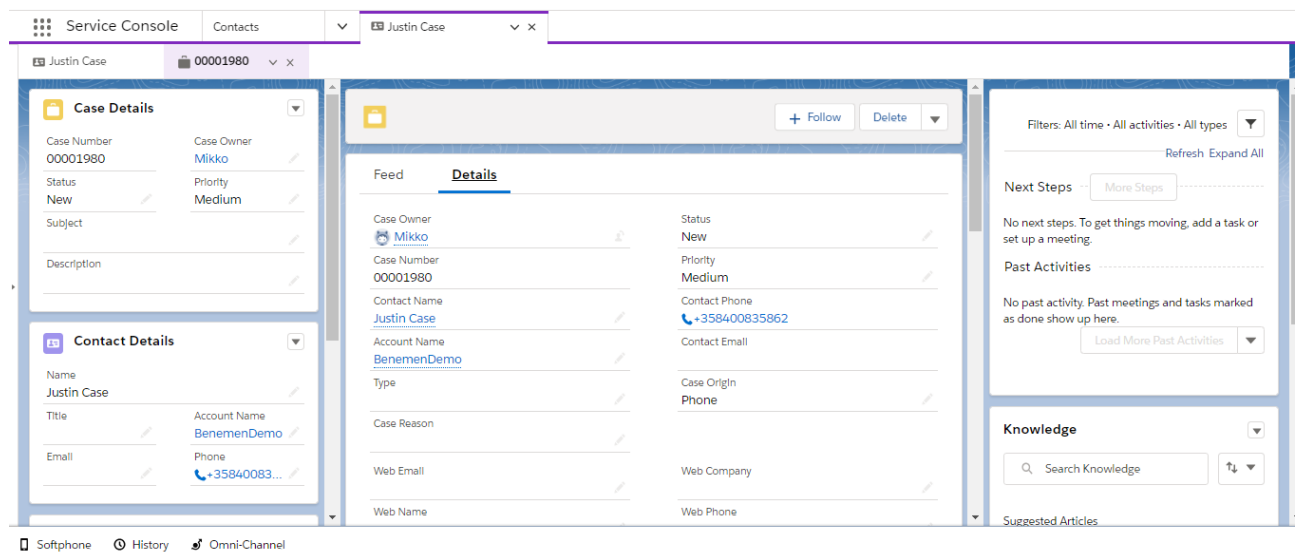
3. Call task activity can be automatically created in the background and also related to the case and the contact. This can be done beginning of the call or when call is answered. Additional setting enables to open call activity to user or not. Note: User configuration includes versatile options when and how call task activities are created and pop-up.
4. Advanced call details (queue wait time and link to possible call recording) are automatically added to the created call task activity within 10 – 1800 seconds after phone call is ended (based Advanced Call Details Interval setting).

Task
Call - Inbound

Name
Justin Case

Related To
00002164

Details   Related

Subject	Call - Inbound	
Task Record Type	Call Task	
Assigned To	Mikko	
Due Date	27.8.2019	
Status	Completed	
Priority	Normal	
CallEndTime	27.8.2019 15:24	
Call Duration	226	
Call Type	Incoming	
Call Result	Answered	
Last Modified By	Mikko, 27.8.2019 15:29	
Created By	Mikko, 27.8.2019 15:24	

Name	Justin Case
Related To	00002164
Comments	
Phone Number 2	+358400835862
Service Pool Queue	Customer Service EN
Queue Wait Time	5 seconds
Advanced Call Details	Link

2.1.2   Inbound Call – Not identified / Multiple identified customers

1.   Web phone rings, no other action is taken
2.   When user answers the call, new Case is automatically created and opened but without any customer details. If user declined the call, then a case is not created
3.   Otherwise the same as the previous use case.

### 2.1.3   Outbound call – Single identified customer

1.   Click to dial from Salesforce. Ringing tone for called and also visual indicator in a web phone.
2.   Customer 360-view is opened if the call was initiated from some other view.
3.   When the customer answers the call, new Case is automatically created and opened. If the customer declined the call, then a case is not created
4.   Otherwise the same as the previous use case.

2.1.4   Outbound call – Not identified / Multiple identified customers

1.   The same as with 2.1.2 .

2.2   CaseDialog - phone workflow

With inbound phone call, web phone is automatically opened for answer / decline. Additionally service pool queue name is visible if phone call is received by one. Phone call management is done via web phone interface.
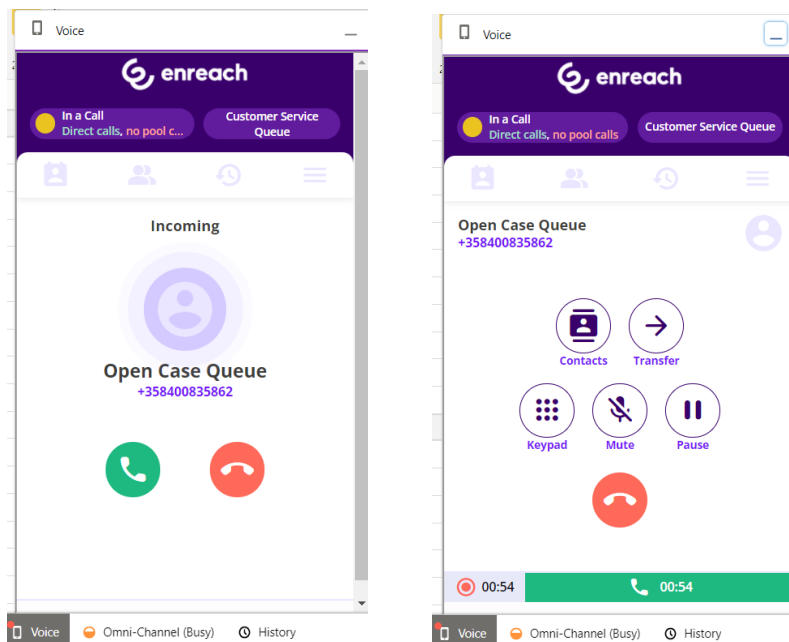
Recommended usage model is that call task activities are created in the background automatically and also related to the identified customer and the case without any pop up and manual user activity. Additionally User configuration includes versatile options when and how call task activities are created and pop-up if wanted.

2.2.1 Inbound call – Not identified customer

A phone call rings in a web phone and it's opened for answer / decline. At the same time separate dialog window is opened to help user to take next actions with the customer.

Dialog window inclde the following:

- Customer phone number and service pool queue name / direct call info
- 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
    - Choosing existing contact will take to Single identified customer contact dialog
- Button to create "New Case" without caller identification at this point.
- Close (X) buttons to close dialog without any action.
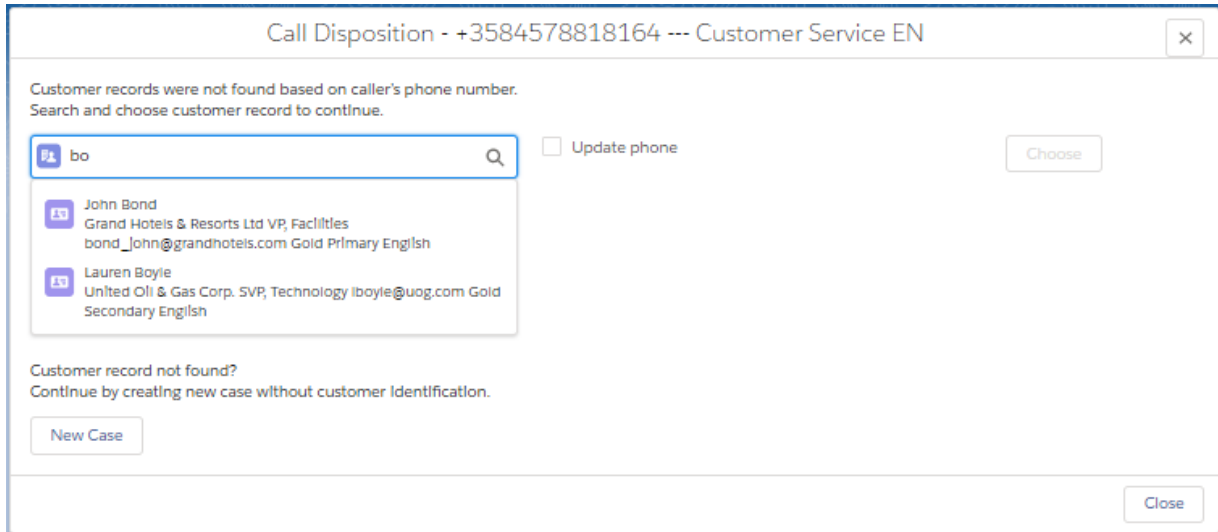
2.2.2 Inbound call – Single identified customer

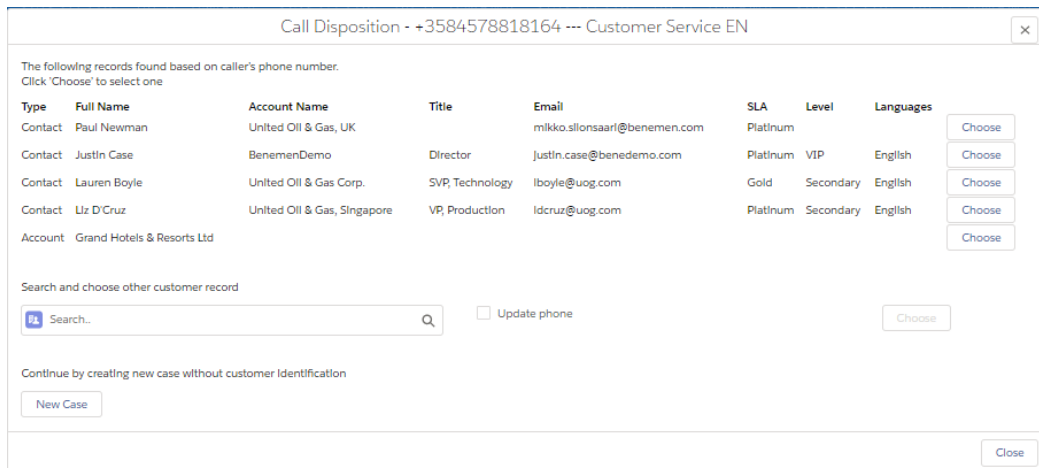As soon as call rings on the web phone, the below dialog is opened in Salesforce

- 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.
- Option to create "New Case" for the contact
- Option to create "New Case – Not identified" if you don't want to use identified user
- Close (X) buttons to close dialog without any action.
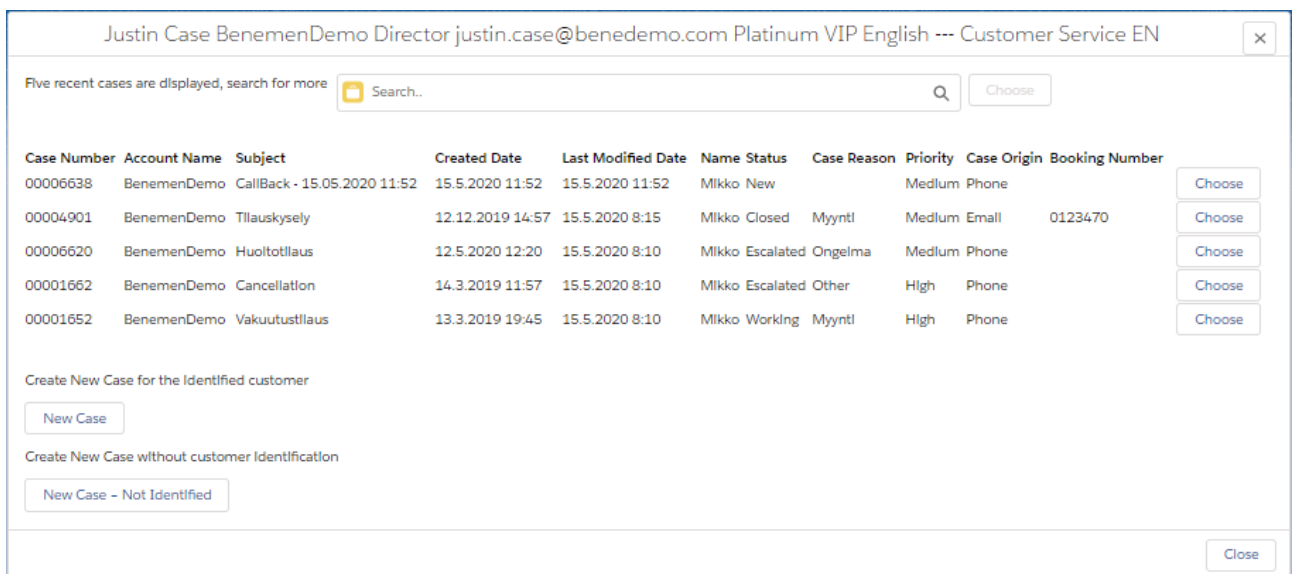
2.2.3 Inbound call – Multiple identified customers

As soon as call rings on the web phone, 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, Business phone, Account Name and Mobile Phone 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 Enreach if click-to-dial should be available in other data type fields than phone number)
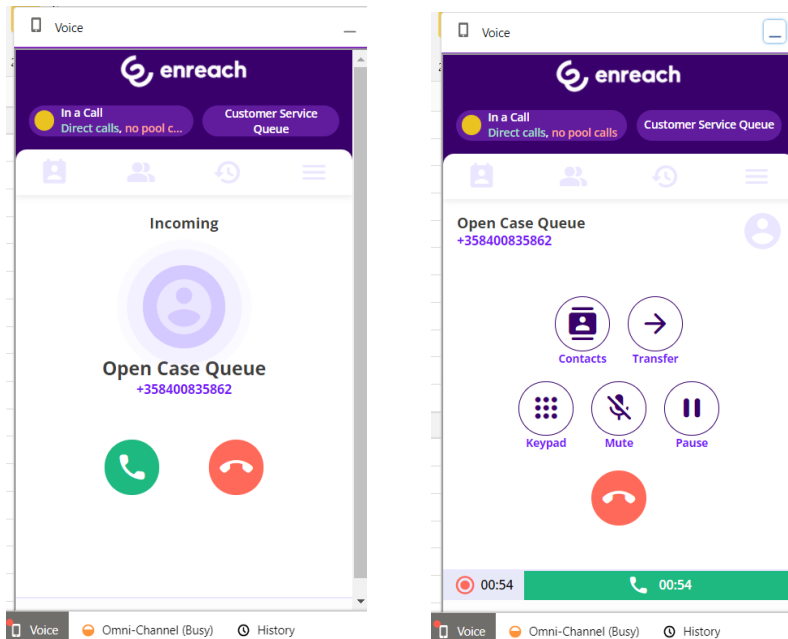
By default Call task activities are created on the background for each outbound call. Call task creation and pop-up can be controlled via user configuration.

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

The solution includes automated relation also if outbound click-to-dial was initiated from some other object as long as object has enabled for 'Related to' functionality. E.g. Case, Opportunity – Related Contacts, Related Accounts, etc.

2.3   Contact&Account – phone workflow

With inbound phone call, web phone is automatically opened for answer / decline. Additionally service pool queue name is visible if phone call is received by one. Phone call management is done via web phone interface.
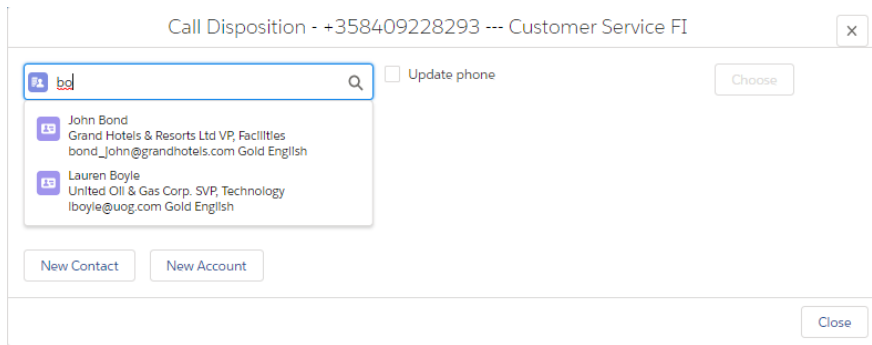

Recommended usage model is that call task activities are created in the background automatically and also related to the identified customer without any pop up and user action. Depending on the use case it might be useful to pop-up activity so that user can add some additional details on it. User configuration includes versatile options when and how call task activities are created and pop-up if wanted.

2.3.1   Inbound call – Not identified customer

As soon as call rings on the web phone , 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.
   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 customer 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 can be automatically created in the beginning of the call or when call is ended, and whether is opened to end user or kept on the background.

2.3.2 Inbound call – Single identified caller

A phone call rings in the web phone and at the same time customer's 360-view is opened.

Call Task Activity can be automatically created in the beginning of the call or when call is ended, and whether is opened to end user or kept on the background.

2.3.3 Inbound call – Multiple identified customers

As soon as call rings on the web phone, 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 open given Contact / Account card
- Search some other contact / account. The same as with Not Identified flow.
- 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 can be automatically created in the beginning of the call or when call is ended, and whether is opened to end user or kept on the background.

2.3.4   Outbound calls

Currently Contact&Account 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 Enreach 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.

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

The solution includes automated relation also if outbound click-to-dial was initiated from some other object as long as object has enabled for 'Related to' functionality. E.g. Case, Opportunity – Related Contacts, Related Accounts, etc.

2.4   Contact&Lead – phone workflow

Works the same as with Contact&Account phone workflow, but instead of Accounts it identifies and creates 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 web phone integration. This occurs when the phone call ends.

Depending on the workflow and caller identification, call task activities are automatically assigned to identified customer 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 versatile configuration options 'when and how' call task activities are created and pop-up. For example call details can be created as a task in the beginning of the phone call.

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

Voice for Salesforce provides also an option to automate call task activity creation for 'any' Enreach cloud phone call i.e. phone calls which are handled elsewhere than Salesforce embedded webphone or not answered at all . Please see Enreach Calls and Service Calls chapters for more details.

3.1 Call details

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, populated for incoming service pool calls)
- Queue Wait Time Sec. (Added 10 – 1800 seconds after activity creation)
- Advanced Call Details (URL to access possible call recording and call details in Enreach cloud side. Added 10 – seconds after activity creation)
- Service Call Details (specific for incoming service pool calls. URL to access service call details in Enreach cloud side, including service pool based call recording)
- Call Type (Incoming / Outbound)
- Call Result (Answered / Not Answered)
- Phone From (Caller number in outbound calls)
- Phone to (used with Enterprise Calls functionality only. Includes Enreach cloud user phone number in the customer phone call)
- Call Date (used with Enterprise Calls functionality only. Timestamp when the customer phone call occured)

With Case and CaseDialog phone workflows, if new case is created during incoming call handling then Service Pool Queue and Phone Number 2 are populated in the case record as well.

Option: Case phone workflow - call details saved within case object

Recommendation is to save call details as Call Task Activity with automated relation to the case. However this admin configuration option can be used for saving call details within worked case object.

Note: All call task activity related configuration options are disabled and not used, when 'Save Call Info on Case' option is checked.
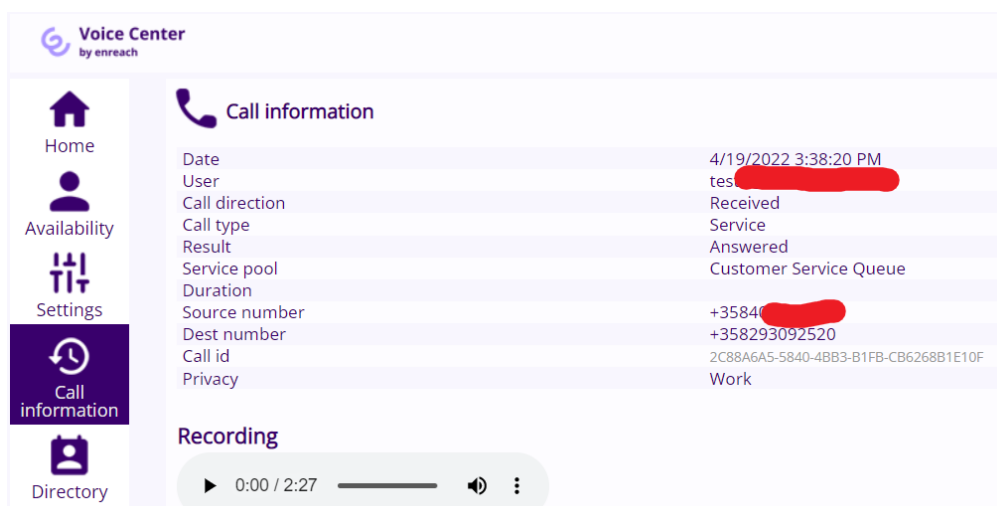
3.2 Enreach side call details & recording access

Starting from version 1.49 Salesforce call details can include two different links (url) to access Enreach Voice Center side call details and recording.

Example of Salesforce side call details with both two call details links visible:

Until this version the solution has included single link in answered call call details which is providing access to user based call details & recording. On Salesforce side the custom field for this is: *Advanced Call Details , BenemenPhone__Recording__c*

Example of user call details in Voice Center view:
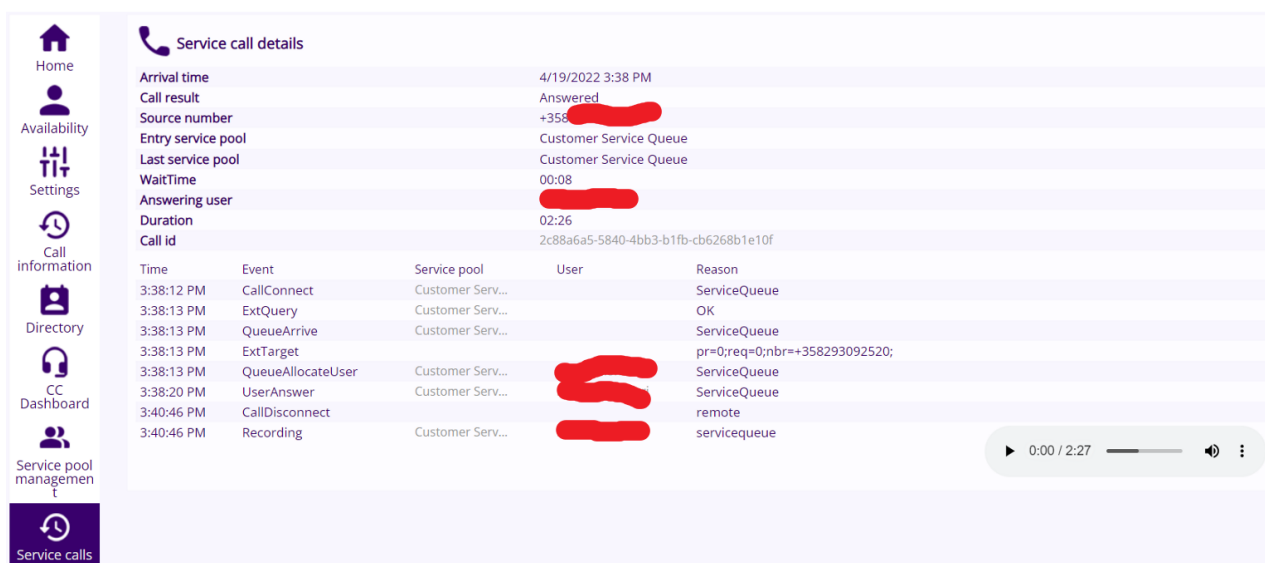
When it comes to incoming service pool phone calls, Enreach voice solution includes option that call recording for such phone calls are done based on service pool

configuration and it's not necessary to generate call recording on user level call details at all (the above model). Please note that call recording can still be generated also on user level call details if so wanted.

Starting from version 1.49 we have added second custom field on Salesforce side call details to access service pool based call details and recording. This is populated for all the answered service pool call details. On Salesforce side the custom field for this is: *Service Call Details , BenemenPhone__ServiceCallDetails__c*

Example of service call details in Voice Center view:

3.3 Additional information

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

- Primary tool / attribute to provide information of the caller, purpose, etc.
- Enreach 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 Voice for Salesforce 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
- Note: If Enreach cloud side on wrap up functionality is used, then this management and reporting happens via Enreach tools and UI's

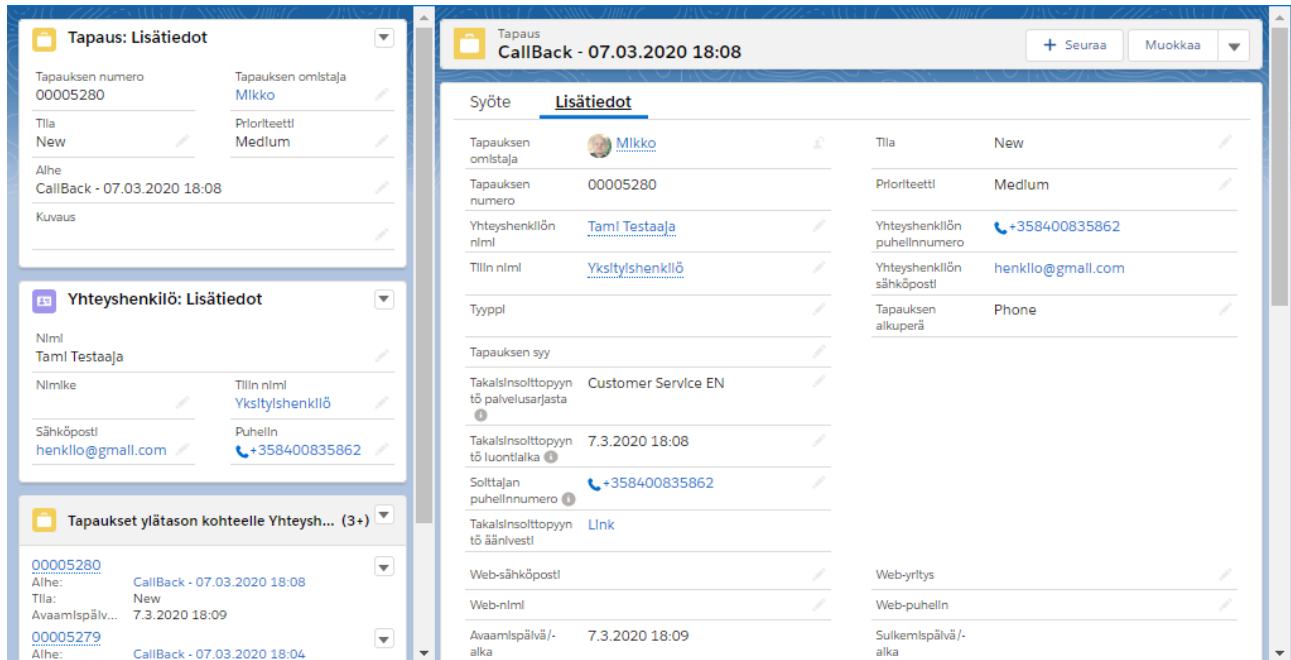# 4 CallBack integration and handling in Salesforce

Voice for Salesforce includes 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. Configuration is described in separate *Voice for Salesforce - Configuration guide* for admins.
- 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:

Example of CallBack Task from not identified contact:

5 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.
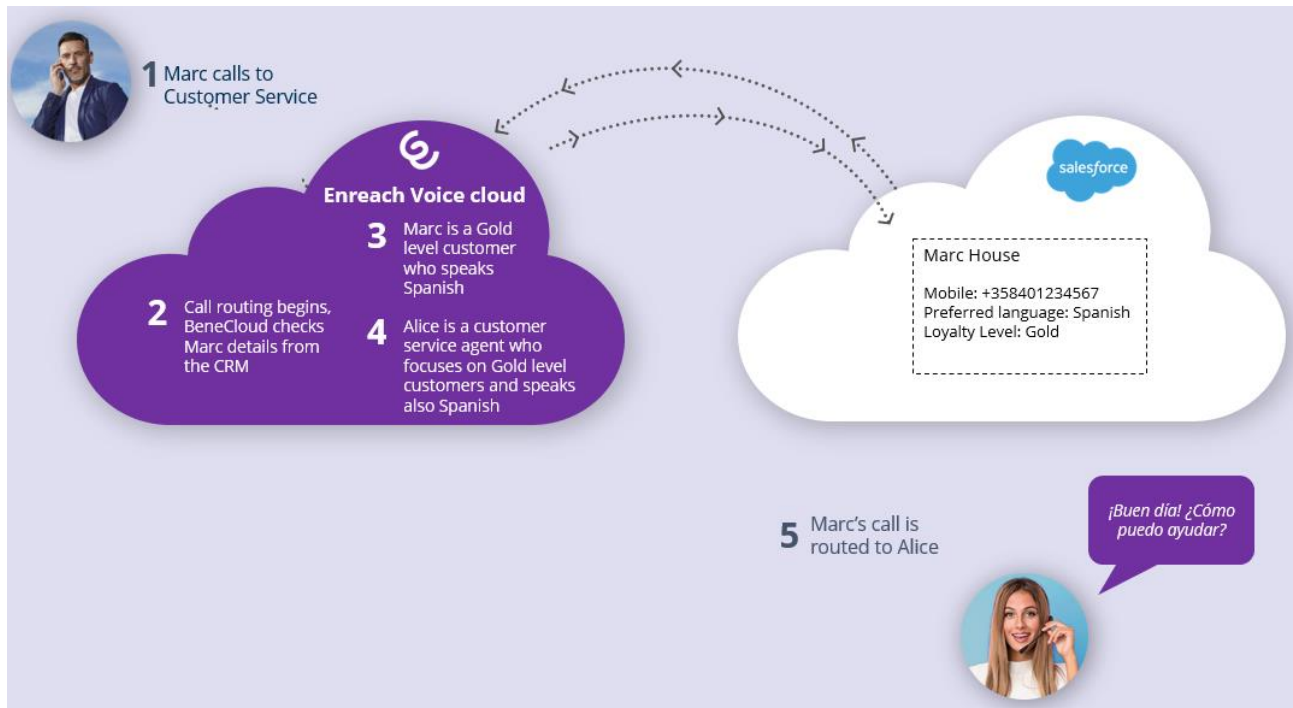

Smart Routing is typically activated on voice queues level and requires activation also at Enreach cloud configuration side. Enreach provides detailed implementation steps in a separate Smart Routing for Salesforce configuration document.

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.

Please consult Enreach for more details on the dynamic smart routing.

6 Enterprise Calls

Enterprise Calls module enables call details creation for phone calls which are not handled in Voice for Salesforce embedded webphone. The data can include call details from direct mobile calls, Voice for Teams calls, not answered calls etc. Please note that Enterprise Calls module handles 'Direct call' data type phone calls. Direct call definition is incoming calls to user's personal phone numbers and all the outbound calls what user makes. 'Service call' data type phone calls are handled via separate Service Calls configuration module.
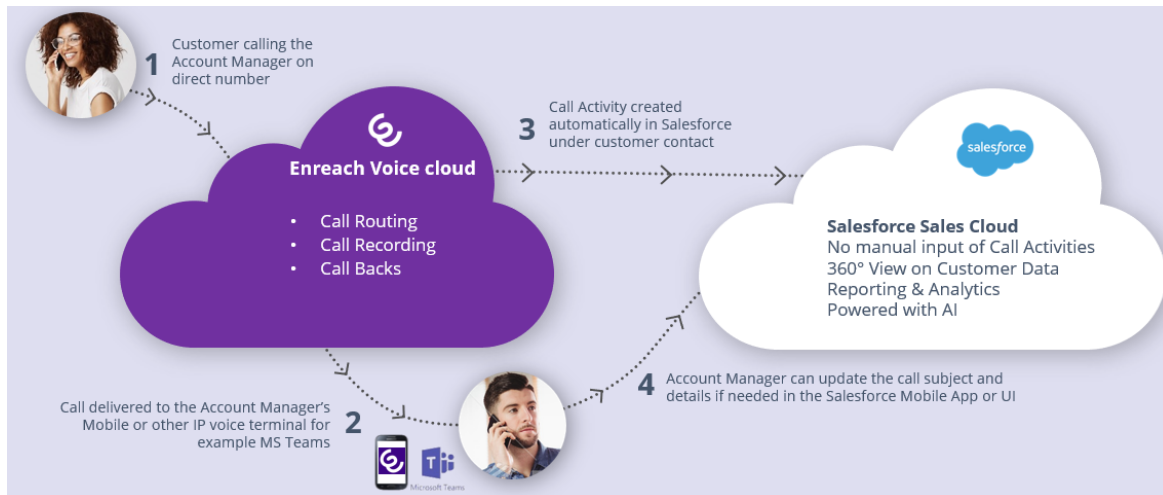
Enterprise Calls task activity creation happens automatically and doesn't require any actions from end users and is not activated on end user basis.

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 Enreach cloud side
- Customer phone number must have at least a one contact record match in Salesforce
- By default all the users phone calls with the above requirements are created. If there is a need to limit creation only to the certain Enreach tenant user accounts, please contact Enreach support

Admin can activate the functionality using continuous lookup mode, when call task activities are automatically created soon 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 Enreach cloud user id. Requirement for this is that the user is also activated for Voice for Salesforce including External User ID mapping in the user configuration. Admin can configure default Salesforce user account, which is used as the owner when the above method is not available.

7   Service Calls

Service Calls module enables call details creation for incoming service calls which are not handled in Voice for Salesforce embedded webphone. The data can include call details from not answered service calls and/or service calls which are answered in some other phone terminal than Voice for Salesforce embedded webphone.
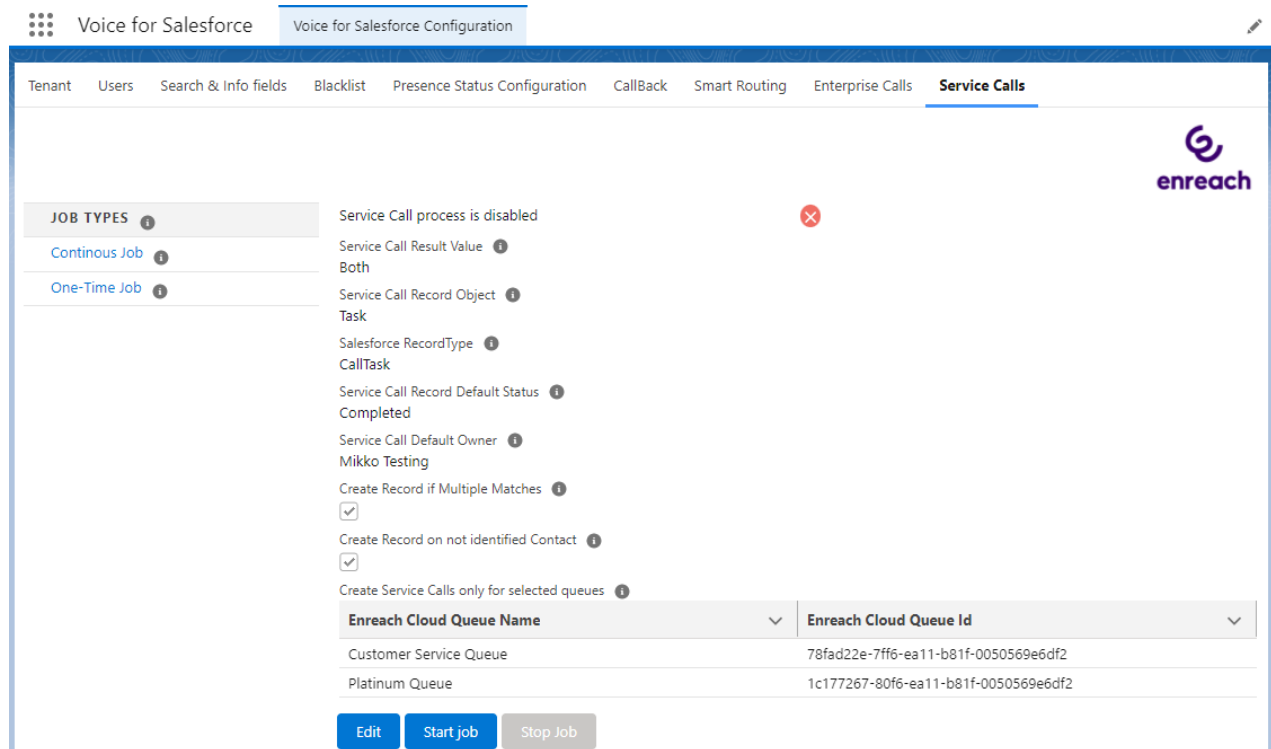
Service call details creation doesn't have any specific requirements outside of the configuration module.

The module provides two type of job types.

Continuous Job:

New service call activities are fetched and created in Salesforce after phone call is ended/disconnected. The phone call details are created to Salesforce *1 to 2 minutes + Advanced Call Details Interval in Tenant configuration* after the call is ended.

Please note that queues listing requires that queues are retrieved via Smart routing -> Retrieve Queues button

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

One-Time Job:

One-time Job which can be used to fetch Enreach cloud service 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.

Additional info

Service call details record owner is automatically identified for answered service calls based on Enreach cloud user id. Requirement for this is that the user is also activated for Voice for Salesforce including External User ID mapping in the user configuration. Admin can configure (Service Call Record Owner) default Salesforce user account, which is used as the owner when the above method is not available and for not answered service call details.

Please note that 'Create service calls only for selected queues' is the main control to limit service call details creation only for certain voice queues. If none is selected, then service call details are created for all the voice queues in the Enreach system.

Voice queue details has 'Entry voice queue' and 'Last voice queue' stored. E.g. if service call first arrives to IVR menu, this gets stored as 'Entry voice queue'. A caller may then select e.g. 1 to English customer service queue, which will route the call for agent allocation in that queue, and English customer service would be stored as 'Last voice queue'. Service Call details are created based on Last voice queue value to Salesforce. Only exception is not answered service call details, when also Entry voice queue is look at if Last voice queue value is empty.

If agent does direct transfer for the service call this can result multiple separate call events and the service call is considered ended only when original A caller call is disconnected. Answered service call events are created after this to Salesforce so that originally answered service agent1 call event is created as well as separate transferred service call event for agent2 who handled the transferred call. Such transferred service call events will have the following format in *Service Pool Queue* custom field: *'Transferred Service Call: <Original service pool name/Personal worknumber>'*

8   Enreach cloud management – general use cases

8.1   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
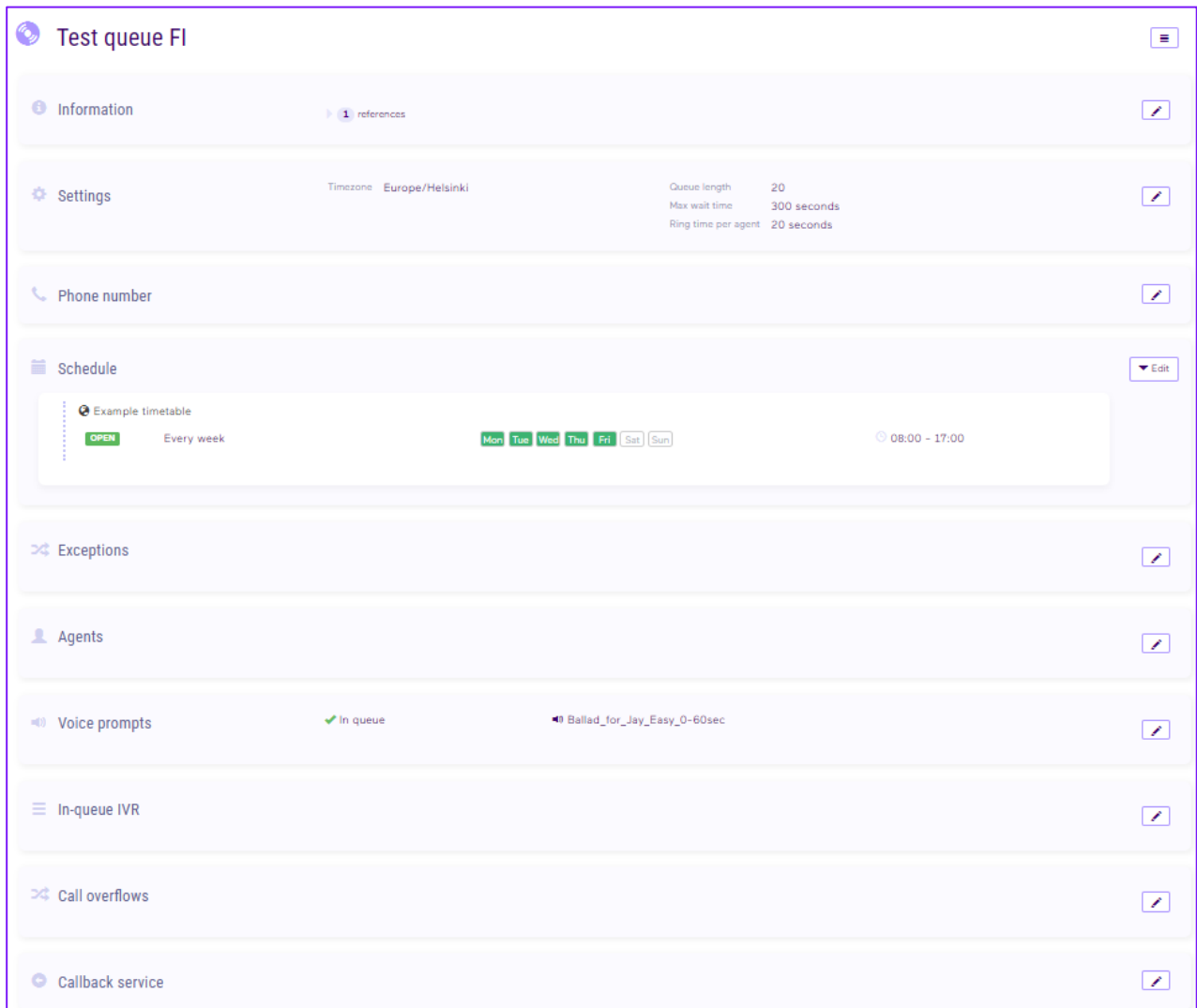
8.1.1 Voice Hub Web UI

1. Login to https://voicehub.enreachvoice.com -> Queues view gives realtime
   snapshot of voice queues available for given agents and admins.
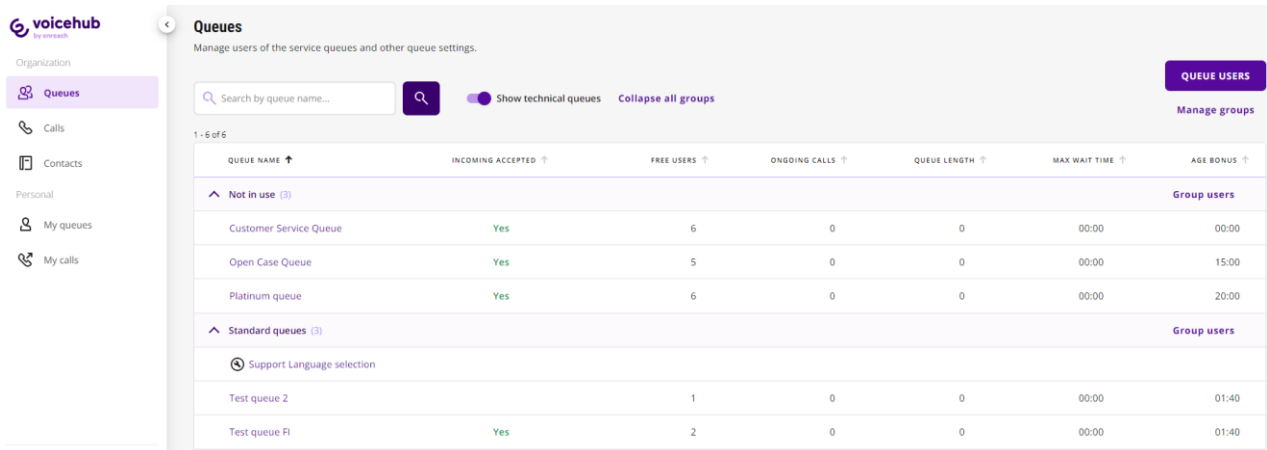
2. Click any queue you would like to see in more detail and do changes in real time.
   a. Modify directly on this screen existing Agent details. Like activate in the
      queue, change skill level.
   b. Use "Add Users" option to remove & add users in the queue
   c. Use "Settings" to modify voice queue workflow.
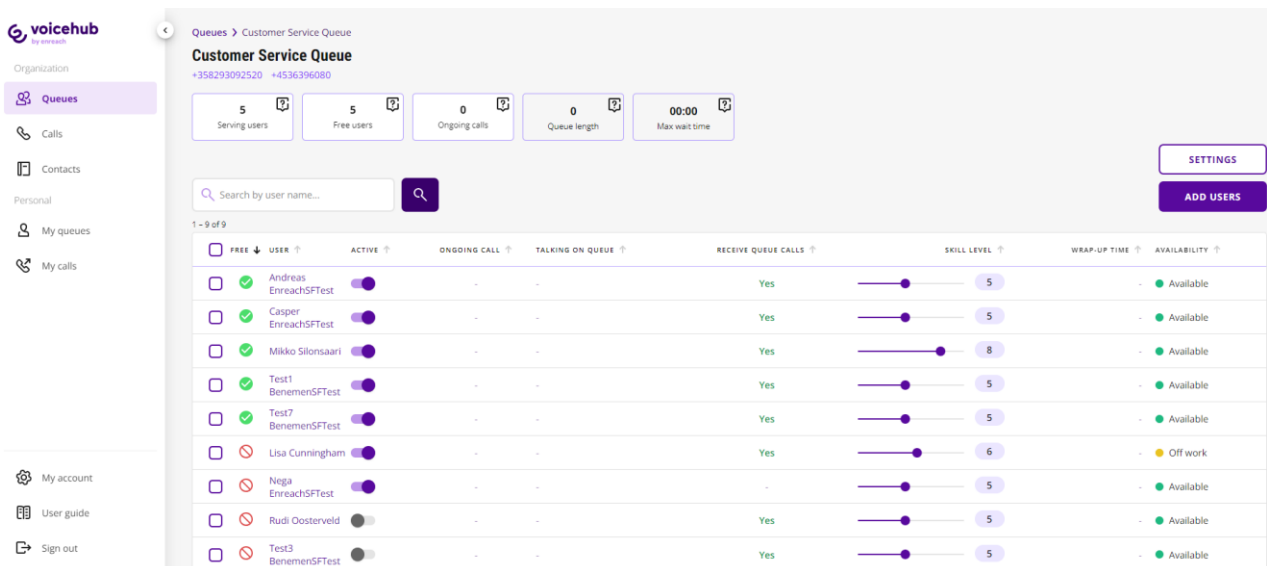
8.1.2   Voice for iOS and Android mobile app

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.
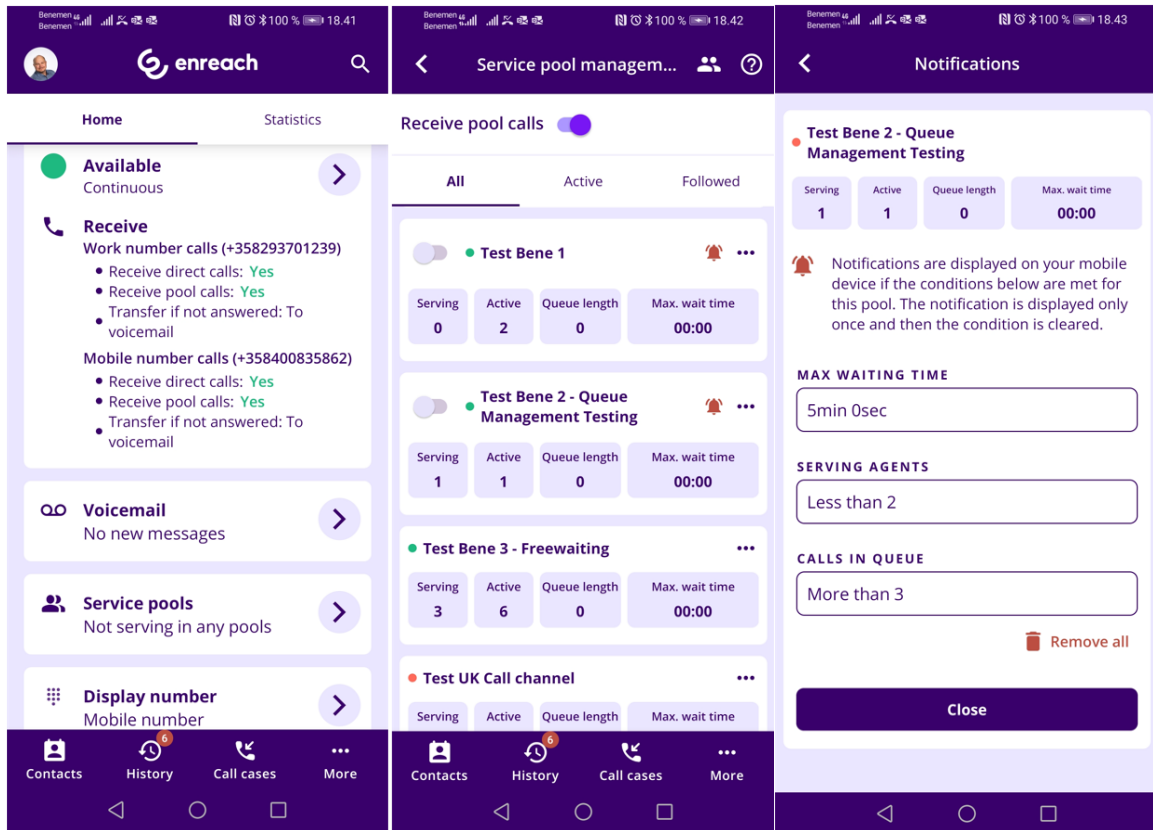
8.2   Dashboards and Reporting

8.2.1   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.

- Additonally 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.

8.2.2 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.