VOICE FOR SALESFORCE

BY ENREACH

Configuration guide

Version 1.50

Contents

1 Salesforce tenant level configuration

The guide applies to Voice for Salesforce by Enreach (later Voice for Salesforce) version 1.50 onwards.

Benemen is now Enreach and BeneVoice for Salesforce product is now rebranded as **Voice for Salesforce by Enreach** starting from version 1.48 .

1.1 Installation Prerequisites

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

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

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

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

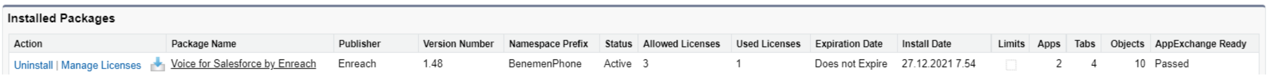
1.2 Install Voice for Salesforce package to Salesforce tenant

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

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

   (note: Product name Voice for Salesforce by Enreach is seen after rebranding completed on Enreach side)

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
(note: Product name Voice for Salesforce by Enreach is seen after rebranding completed on Enreach side)



Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall | Manage Licenses	Voice for Salesforce by Enreach	Enreach	1.48	BenemenPhone	Active	3	1	Does not Expire	27.12.2021 7.54		2	4	10	Passed

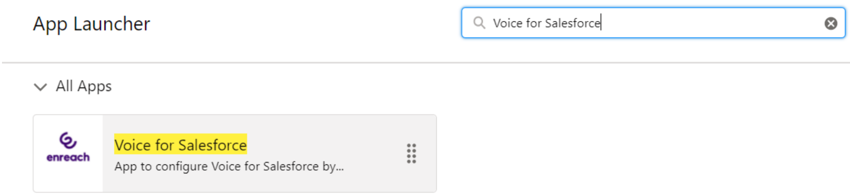
c. With **Site License** type all end users are automatically licensed.
If **User License** type is used, use Manage Licenses option to assign license to relevant admins and end users.
By default User License installation comes with 3 user licenses. Please consult Enreach for additional agreed licenses.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

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

Enabled Permission Sets
Voice for Salesforce Admin
Voice for Salesforce SoftPhone

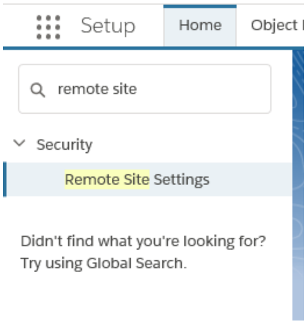
e. Admin user will now see and can open Voice for Salesforce app listed in App Launcher and continue to the next configuration step

Note: If you are upgrading from V.1.47 or earlier configurator app name continues to display as BeneVoice. For convenience, please manually update lightning app name and logo via Setup -> App Manager -> Edit BeneVoice app -> Rename as "Voice for Salesforce" and clear BeneVoice app branding image. You can leave branding image empty or please request Enreach logo image from Enreach support.



1.3 Configure Remote Site Settings for Discovery URL

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



b. In Remote Site Settings view -> New Remote Site
c. Add new site

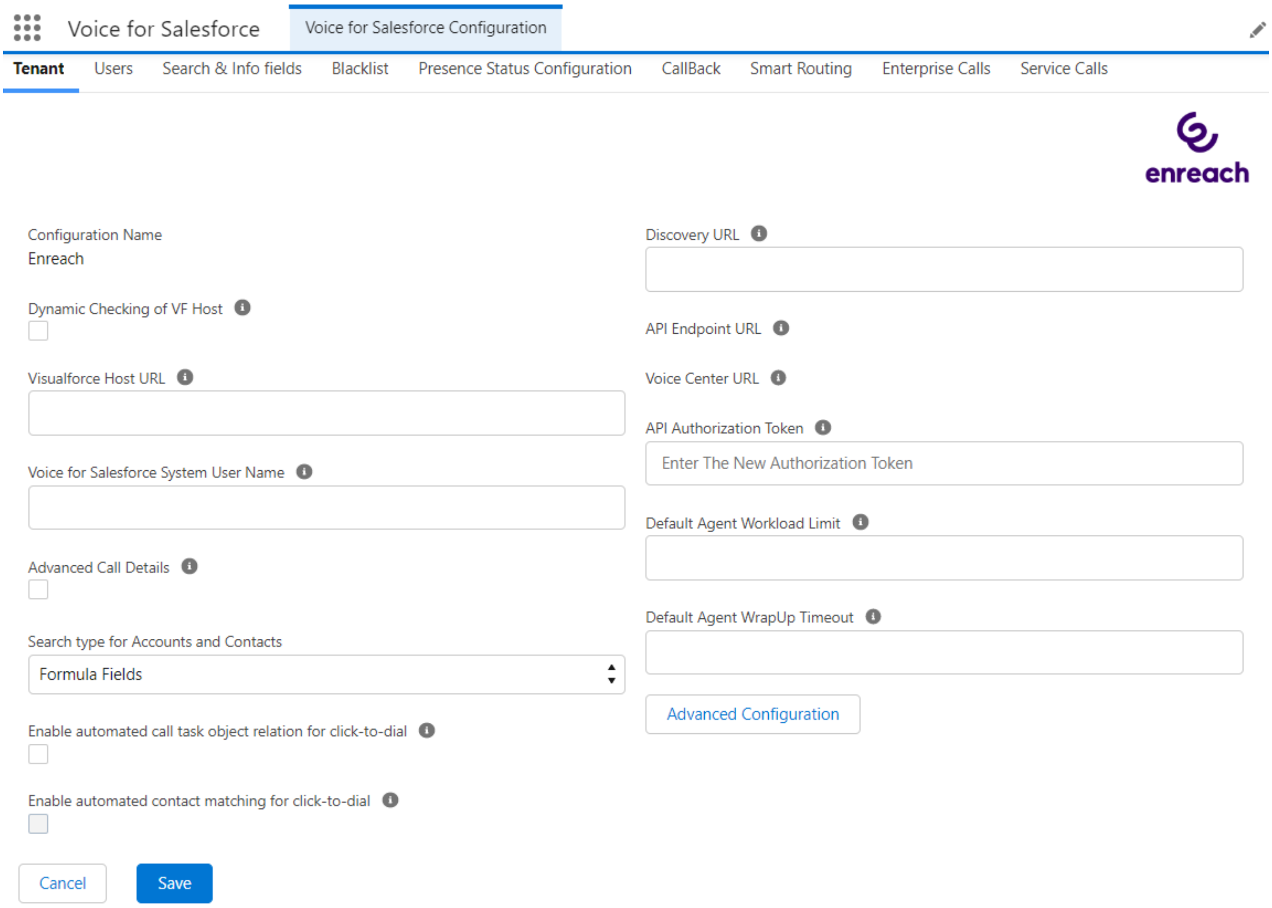
Name: Voice (this can be anything) *Remote Site URL:* < Discovery URL provided by Enreach> *Active checkbox: checked*

1.4 Voice for Salesforce Configurator

Note: If you have upgraded from V.1.47 or earlier configurator app name continues to display as BeneVoice. For convenience, please manually update lightning app name and logo via Setup -> App Manager -> Edit BeneVoice app -> Rename as "Voice for Salesforce" and clear BeneVoice app branding image. You can leave branding image empty or please request Enreach logo image from Enreach support.

1.4.1 Tenant Configuration

a. Go to Voice for Salesforce app -> Tenant
b. Click 'Create new configuration' -> Edit



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

Configuration name

Enreach (created automatically)

Dynamic Checking of VF Host

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

Visualforce Host URL

Obtain URL by going to Setup -> Visualforce Pages
Find and open 'Softphone2' and go to Preview
On Preview browser page copy URL ending force.com (do not copy the last part /apex/SoftPhone#/)

Example: https://customerorg--benemenphone.vf.force.com
Paste copied URL to Visualforce Host URL field

Voice for Salesforce System User Name

Enreach provides Voice for Salesforce API system account user name used in the configuration.

Advanced Call Details

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

Advanced Call Details Retrieval Interval (in seconds)

Call activity record is created when the phone call is ended. Advanced call details are added and saved to the record after configured time interval. 10 - 1800 seconds.

Discovery URL

The URL is provided by Enreach. Used to query API Endpoint and Voice Center URL's. This URL must be added in Remote Site Settings.

API Endpoint URL

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

Voice Center URL

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

API Authorization Token

API Authorization Token is provided by Enreach.

Default Agent Workload Limit

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

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

be allocated service calls until the workload value goes lower than the configured numeric value.

Default Agent Wrap-Up Timeout

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

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

Search type for Accounts and Contact

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

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

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

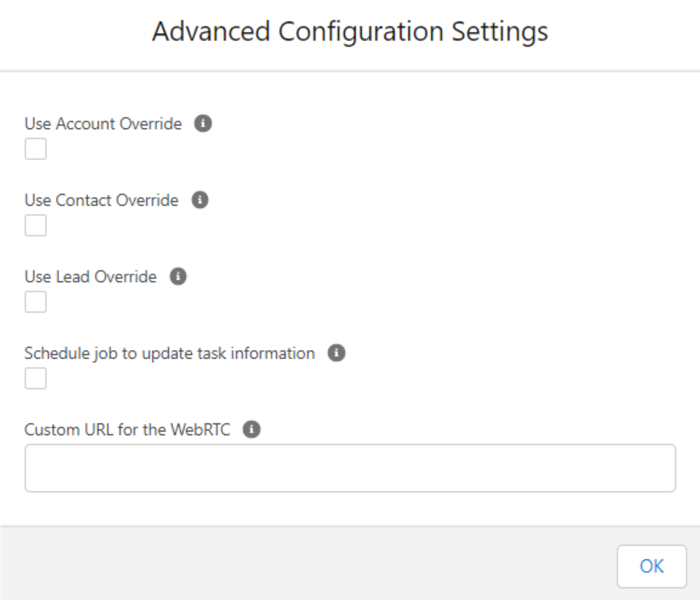
This is optional setting. By default outbound click-to-dial call task activities are not automatically related to the object where click-to-dial was initiated from. Also possible contact / account matching is done only by phone number.
When this setting is enabled, call task activity is automatically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

Enable automated contact matching for click-to-dial

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

Advanced Configuration

Includes non-standard configuration settings. Typically configured only if so adviced by Enreach support.



Use Account / Contact / Lead Override

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

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

Schedule job to update task information

Enable only if call task creation is set to happen at the start of phone call is Users settings AND if 'Advanced Call Details' is not enabled. This job will then add details like call duration and call end time to the call details.

Custom URL for the WebRTC

Can be used to override default version of used embedded webphone (webrtc). Please configure only when so adviced and consulted by Enreach support.
When activated, the url shall be provided in the below format where <version> is replaced by actual webphone version number.
https://phone.enreachvoice.com/<version>/webrtc-client-ui.min.js

1.4.2 Users Configuration

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

- Agent List fetches all the users added to **'Voice for Salesforce Softphone' permission set**
- **Voice for Salesforce webphone** single sign-on experience by default automatically uses user's Salesforce user account Email attribute for mapping user's Enreach user account. If User's Salesforce email attribute is different than Enreach user acoount Email (username), then you need to manually use and enter Enreach user email in the Voice for Salesforce user configuration
- Case and CaseDialog phone workflows require console navigation type of Lightning app for popping up chosen / new cases.
- Case and CaseDialog phone workflows involves automated Case creation. This may require additional configuration described below.
    - Please ensure via **Object Manager** that the used **Case layout** object allows automated case creation for Voice for Salesforce enabled end users e.g. Default values for possible required case fields.
    - Please ensure that the following **Case related Object Settings** are enabled for Voice for Salesforce enabled end users. This is usually done via **Setup -> Profiles -> <select user profile> -> Object Settings -> Cases** (please ensure first that Enhanced Profile User Interface is enabled via Setup -> Users -> User Management Settings)

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

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

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

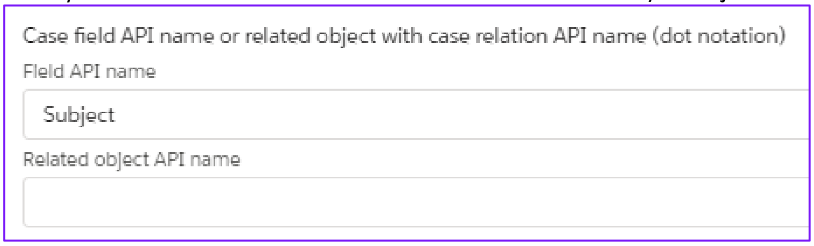
1.4.3 Search & Info fields

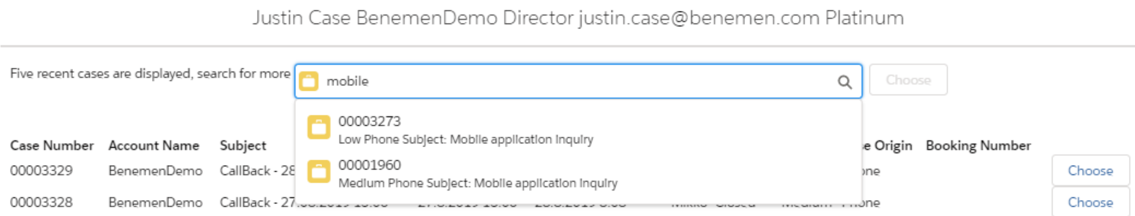
Optional configuration if default search options and info fields are not sufficient.

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

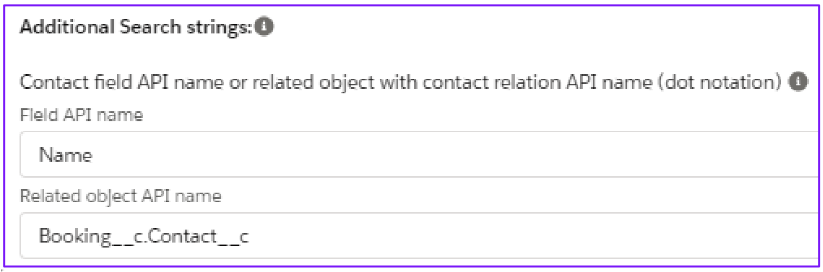
Examples:

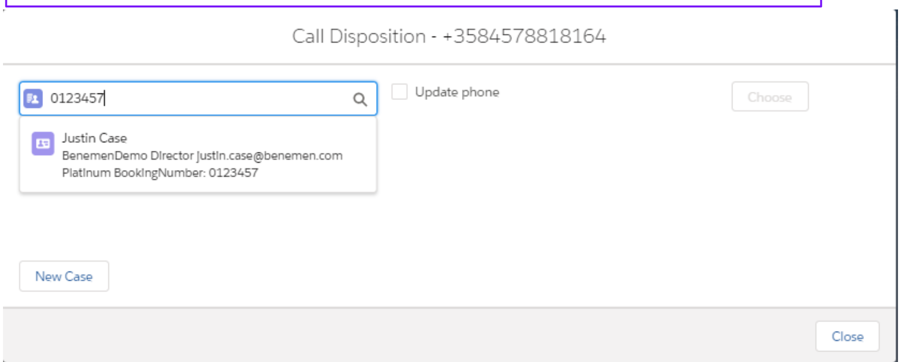
1) The below enables Case search also by Subject





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





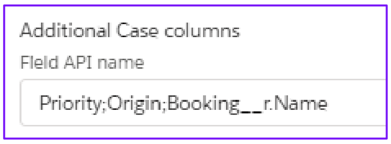
Additional Info fields:

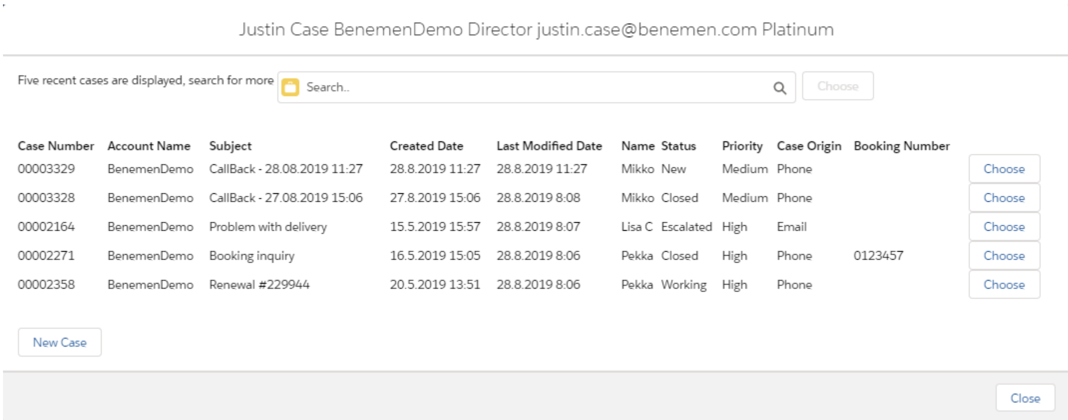
Add here additional Info fields to be shown on workflow dialog windows.

Multiple fields can be added using semi-colon ";" separator. Important: do not leave any white spaces.

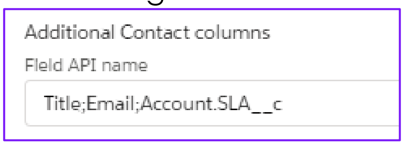
Examples:

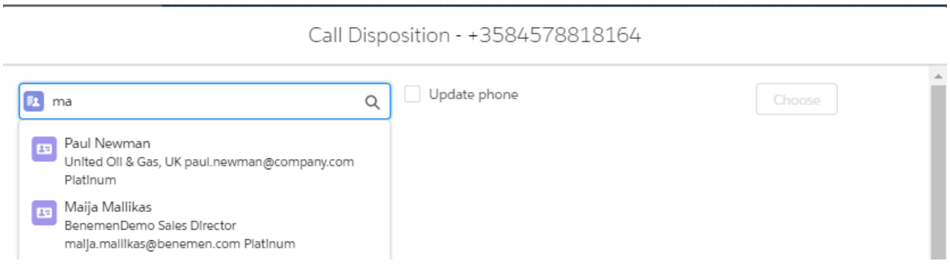
1) Case dialog displays also case priority, origin and custom case field Booking name value





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





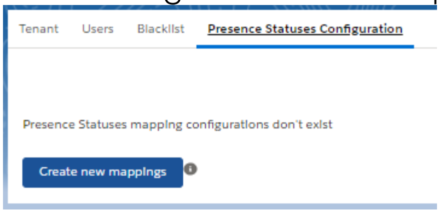
Note: Please ensure that end user profiles have at least Read access to all the fields and objects used in the configuration.

1.4.4 Presence Statuses Configuration

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

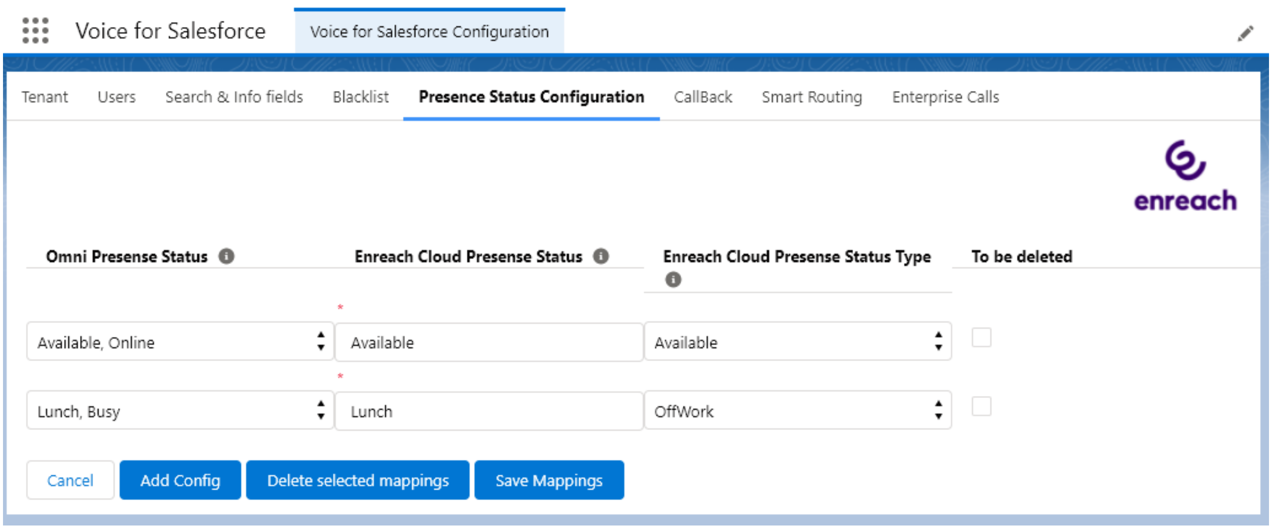
Here you will create mapping for configured Omni-Channel statuses on how they are affecting Enreach voice service availability.

a. Start clicking "Create new mappings"



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

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



d. Complete by "Save Mappings"

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

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

OmniChannel Fallback Status

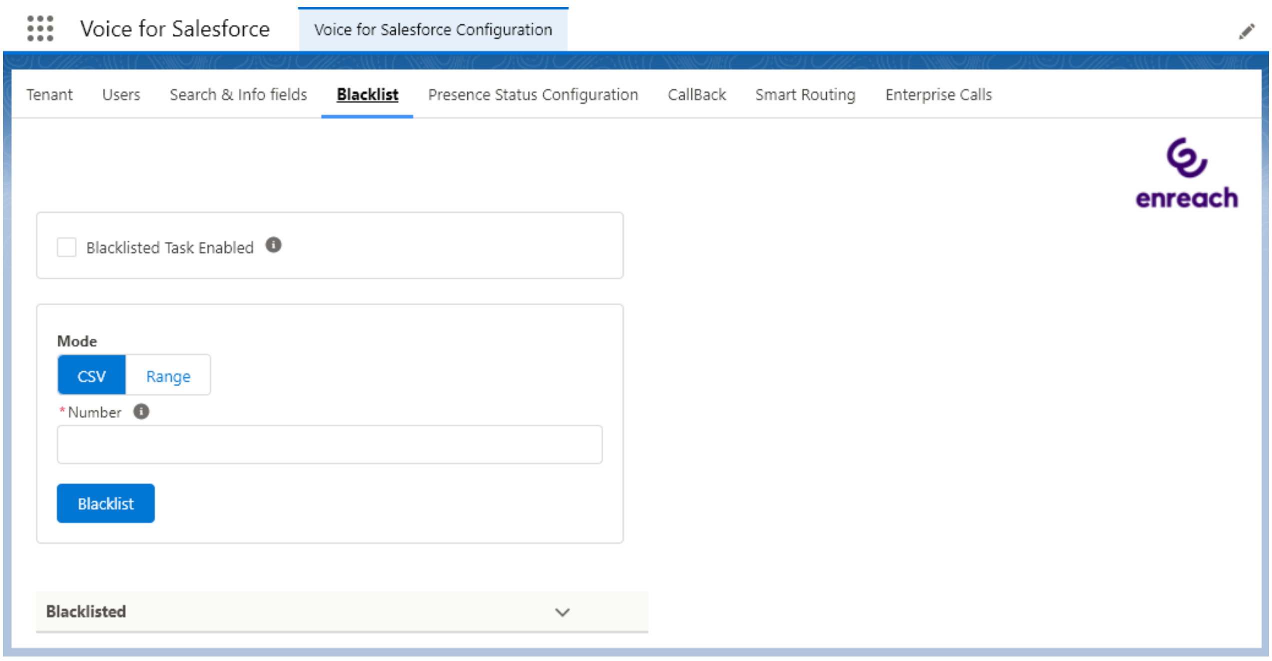
If the correct OmniChannel presence status can't be determined the presence status will be reverted to the Fallback Status. Fallback status can be set on the User Configuration page for each user in the selection "Fallback OmniStatus". If left empty "Offline" will be used.

1.4.5 Blacklist Configuration

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

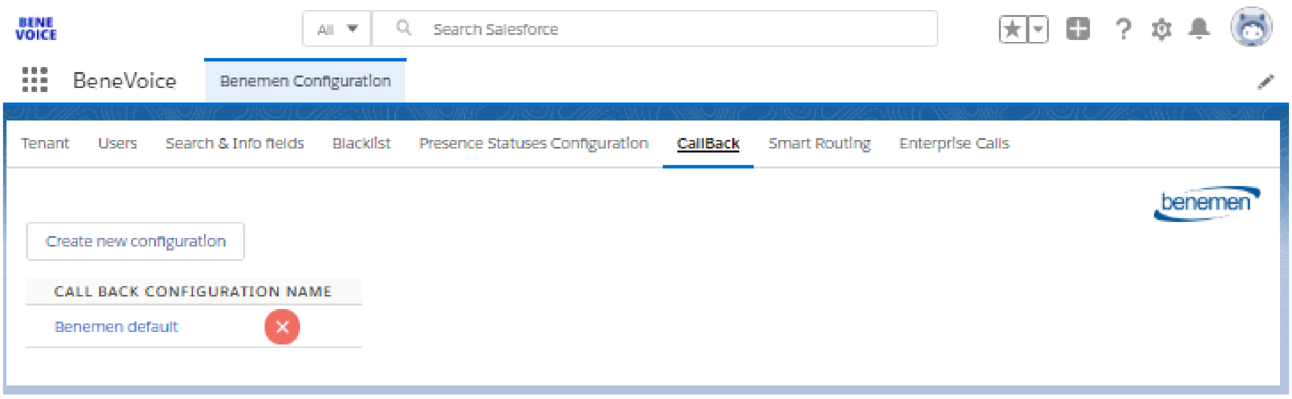
Blacklisted Task Enabled:

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



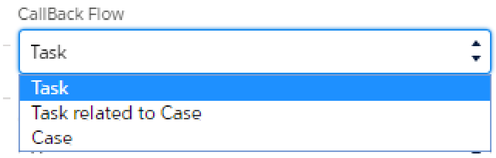
1.4.6 CallBack Configuration

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

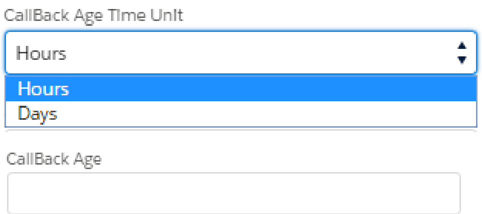


1. Click 'Create new configuration' button to start configuration
2. Give any name callback configuration name

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

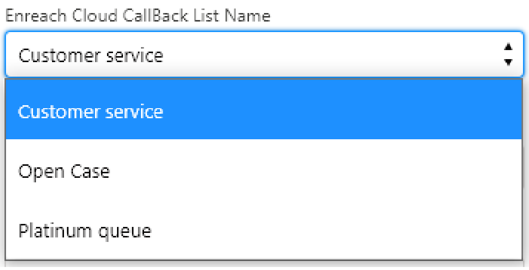


4. Select wanted CallBack Age Time Limit. Time unit for measuring CallBack age which should be retrieved from Enreach cloud.
   Type wanted CallBack Age. This is age of open callback what should be retrieved.

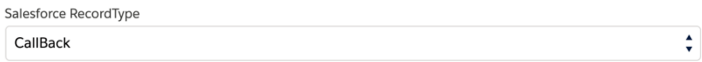


These are only valid when you start the job to retrieve callbacks from Enreach cloud side. When callback job is active, it will always retrieve and create new callback requests within 15 seconds.

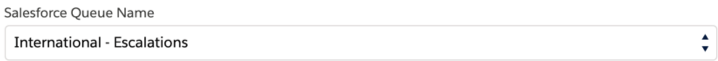
5. Enreach Cloud CallBack List Name dropdown list shows available callback lists configured on Enreach cloud side. Select here appropriate callback list name you would like to integrate and handle on Salesforce side.



6. Select Salesforce Record Type for Case or Task

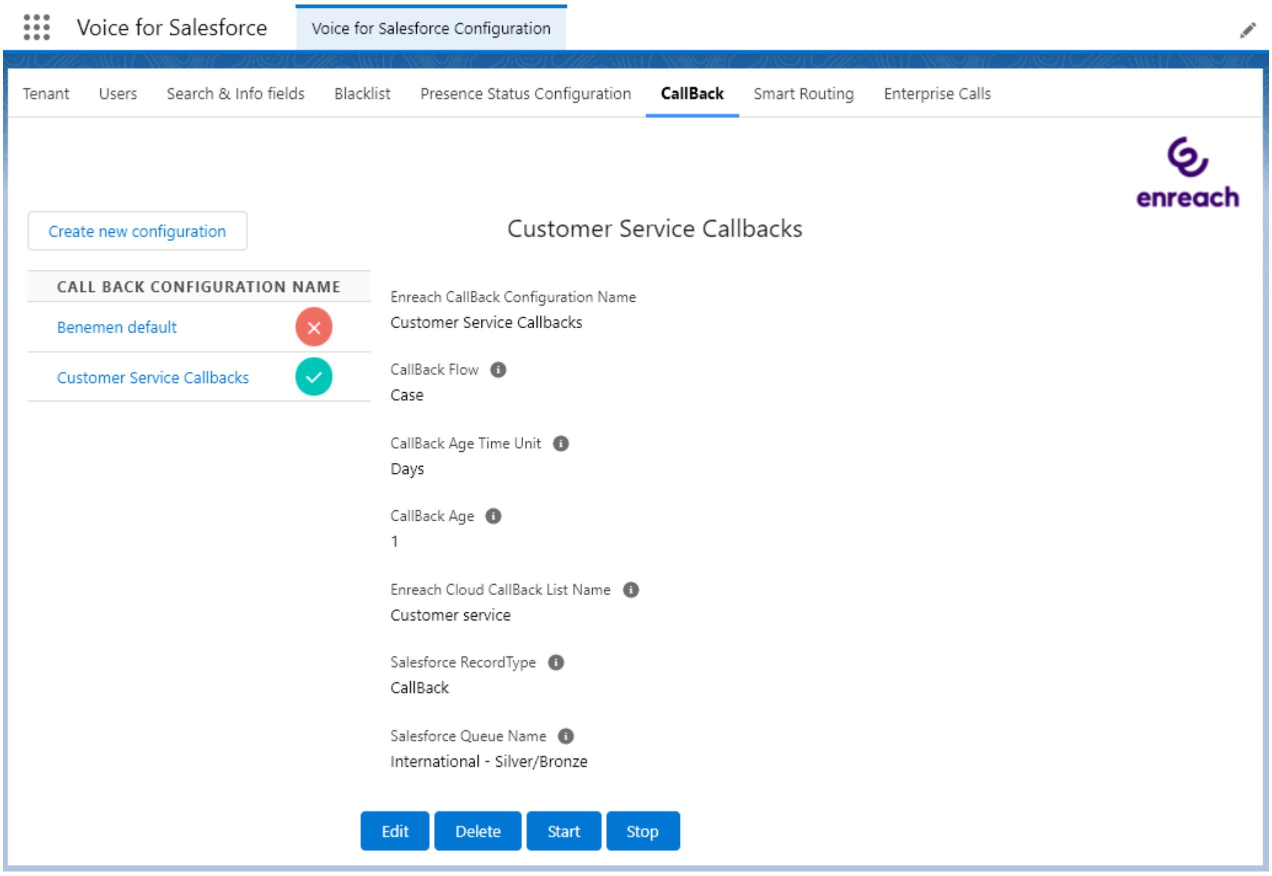


7. Salesforce Queue Name lists all the available Salesforce queues.
   Select here the Salesforce Queue you would like to assign callback Cases or Tasks.



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

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



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

- 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, can be used for hard coded text from Enreach cloud side. E.g. 'Dropped call callback' for such callbacks which has been created for abandoned (missed) service calls

1.4.7 Smart Routing

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

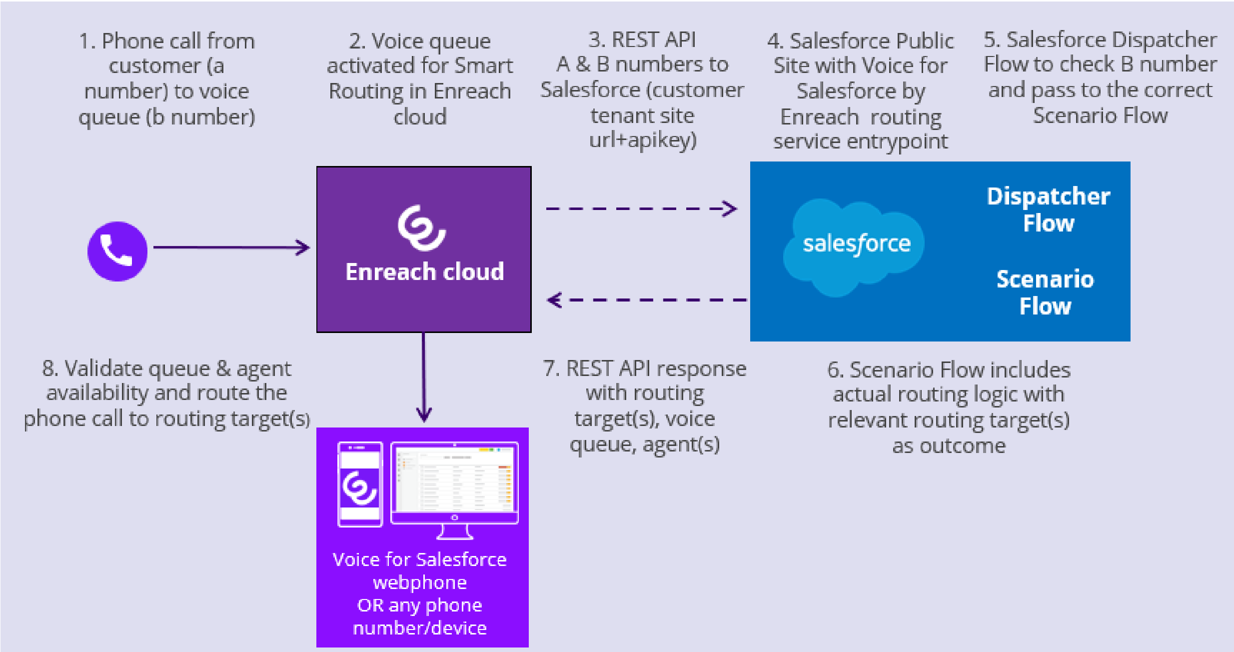
Native Salesforce Flows and Flow Builder is used to configure actual routing logic. Managed package includes two predefined Flow templates, which can be used and modified for specific customer scenario, when activating Smart Routing. Customer can freely create their own Scenario flows too.

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

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

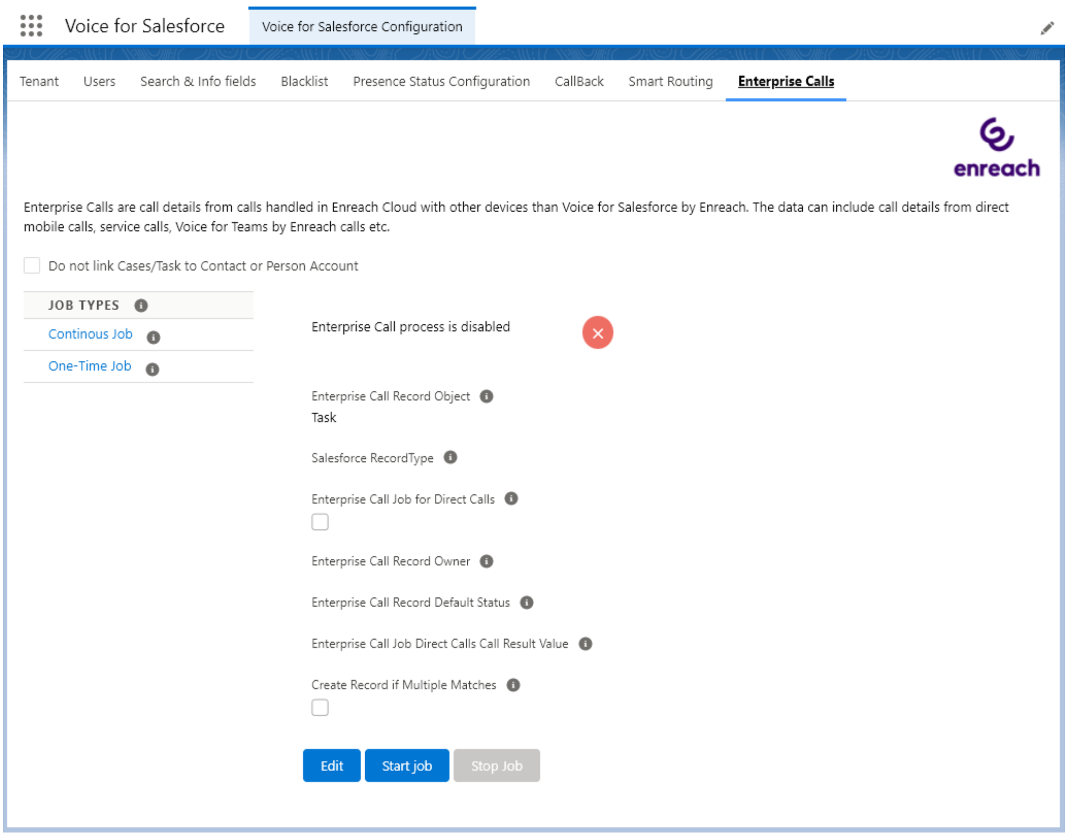
Admin can freely deactivate the templates although they are not themselves doing anything.

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



1.4.8 Enterprise Calls

Enterprise Calls configuration 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.



Call details creation has the following requirements:

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

The module provides two type of job types.

Continuous Job:

New call activities are fetched and created in Salesforce after phone call is ended/disconnected. Currently the phone call details are created 2 hours after the phone call has ended. (Enreach is working to decrease this timespan in a future version)

One-Time Job:

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

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

Do not link Cases/Task to Contact or Person Account

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

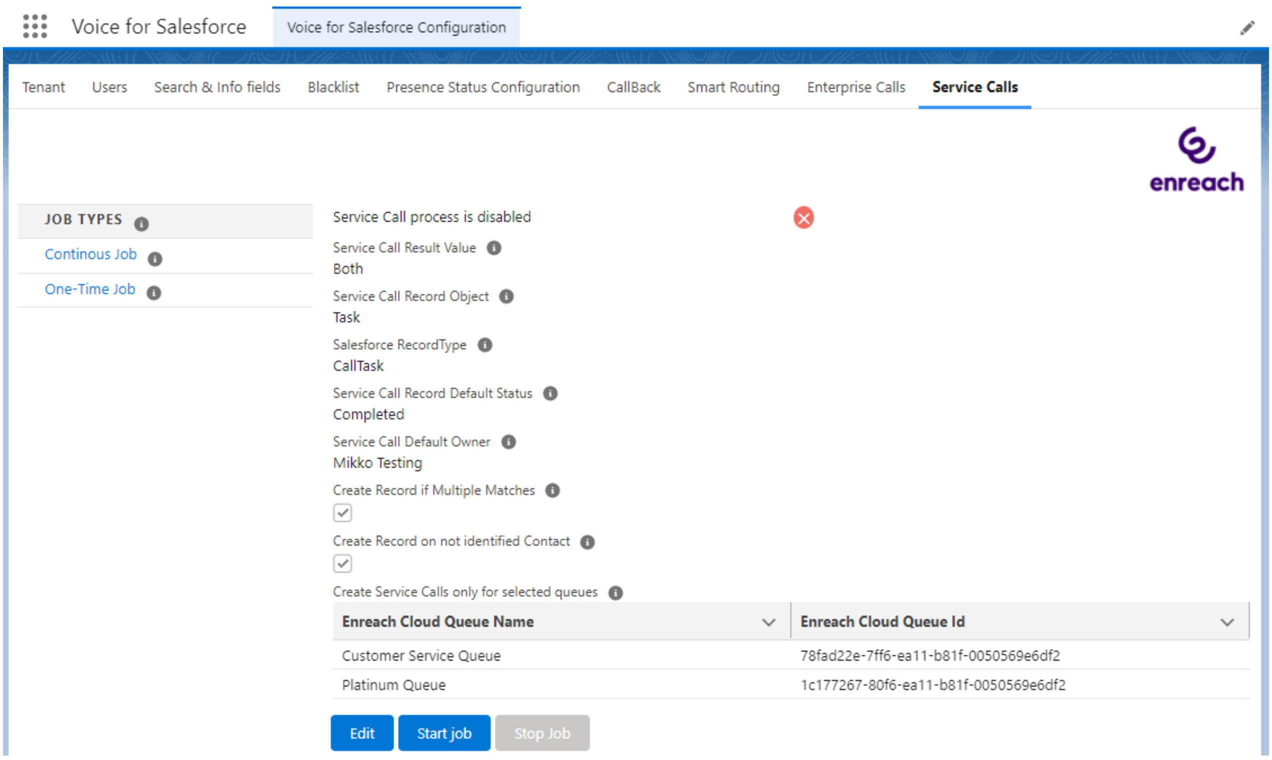
If Cases/Tasks created from Enterprise Calls are not wanted to be linked to Contacts/Person Accounts this can be chosen in the checkbox "Do not link Cases/Task to Contact or Person Account".

Additional info

Call details record 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 (Enterprise Call Record Owner) default Salesforce user account, which is used as the owner when the above method is not available.

1.4.9 Service Calls

Service Calls configuration 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. Currently with the phone call details are created 2 hours after the phone call has ended. (Enreach is working to decrease this timespan in a future version)

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.

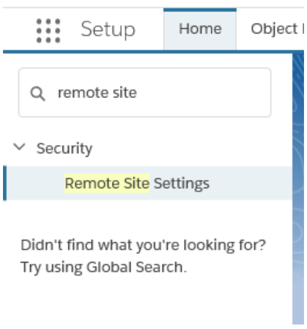
Additional info

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 (Enterprise 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.

1.5 Configure SF Remote site settings for API Endpoint URL

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



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

f. Add new site

Name: VoiceforSalesforce2 (this can be anything)
Remote Site URL: < API Endpoint URL visible in Tenant configuration>
Active checkbox: checked

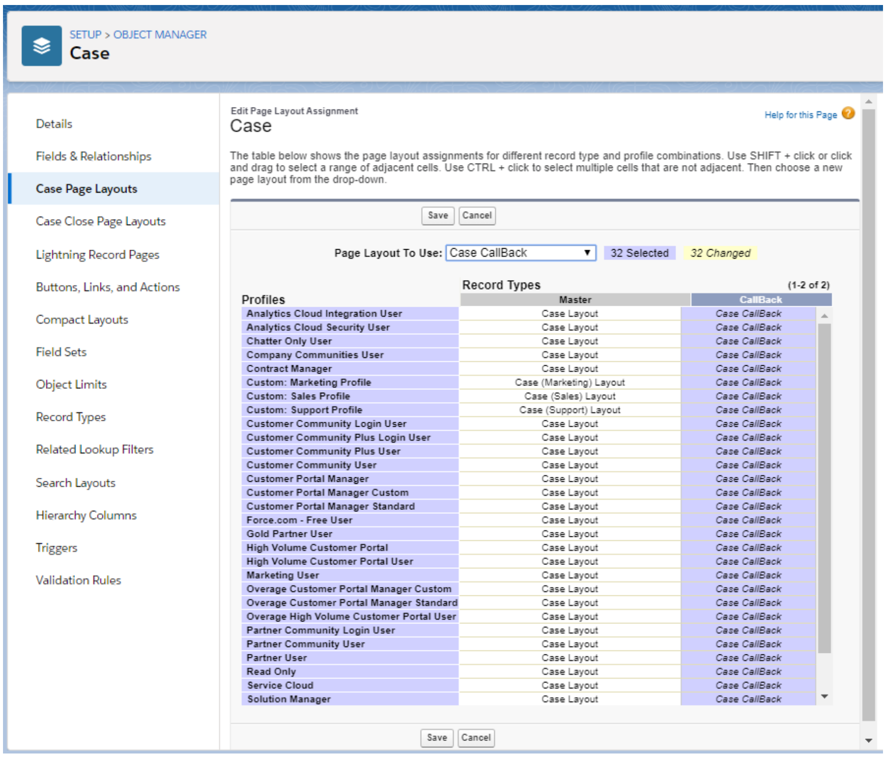
1.6 Configure integration Case and Task page layouts and assignments

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

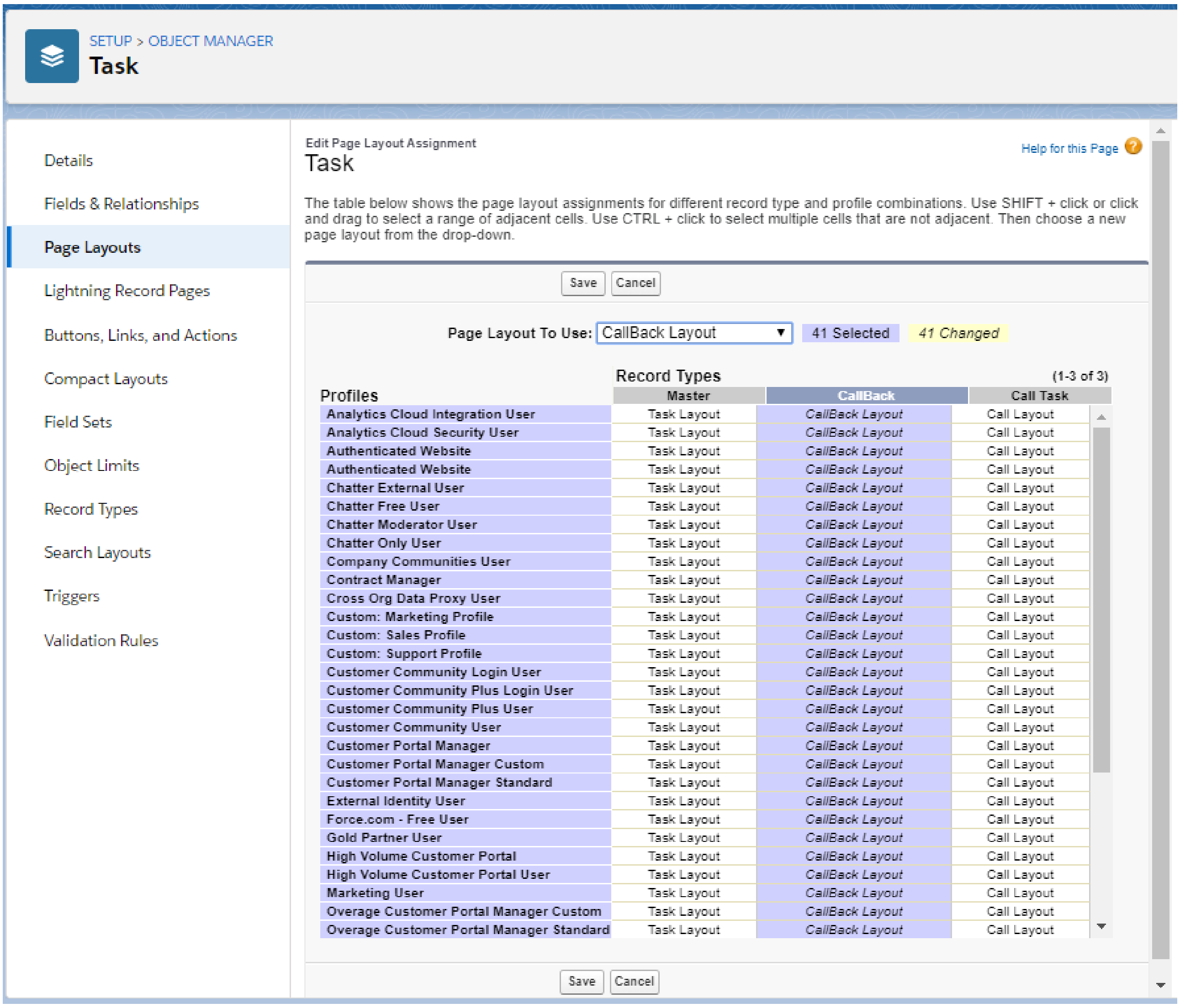
Please ensure page layout assignment(s) manually via Object Manager for the needed profiles.

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

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



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



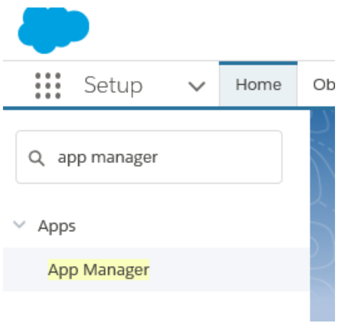
1.7 Activate Voice for Salesforce in Lightning App(s)

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

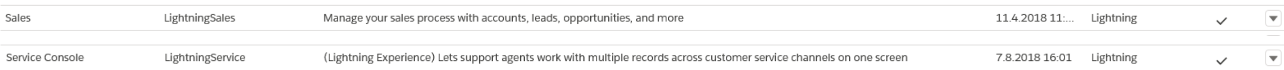
Note: If Omni-Channel is used in Lightning app where adding Voice for Salesforce, you must ensure that all Omni-Channel users using this Lightning app are fully configured for Voice for Salesforce.

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

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

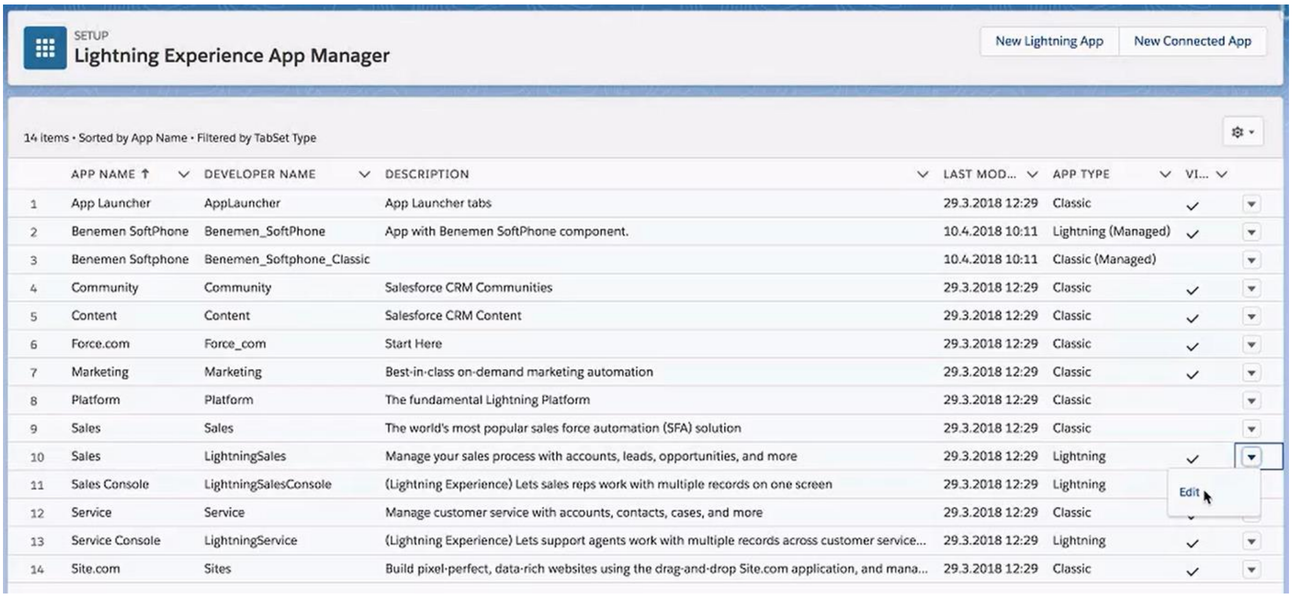


b. In App Manager you can add Voice for Salesforce utility item to wanted SF Lightning apps , typically "Sales - Lightning Sales" AND/OR "Service Console – LightningService"



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

c. Edit selected App



SETUP
Lightning Experience App Manager

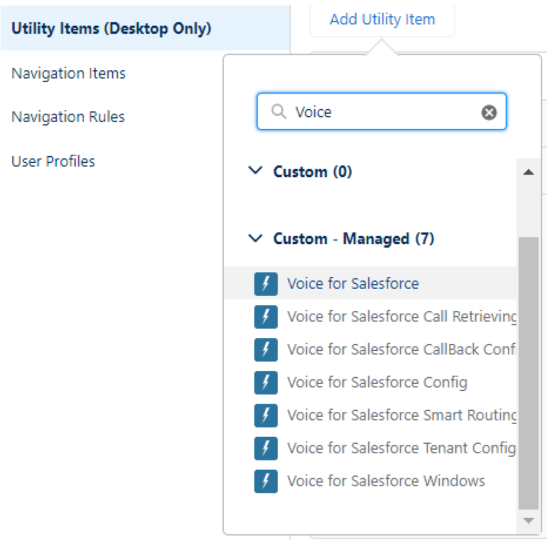
New Lightning App | New Connected App

14 items • Sorted by App Name • Filtered by TabSet Type

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

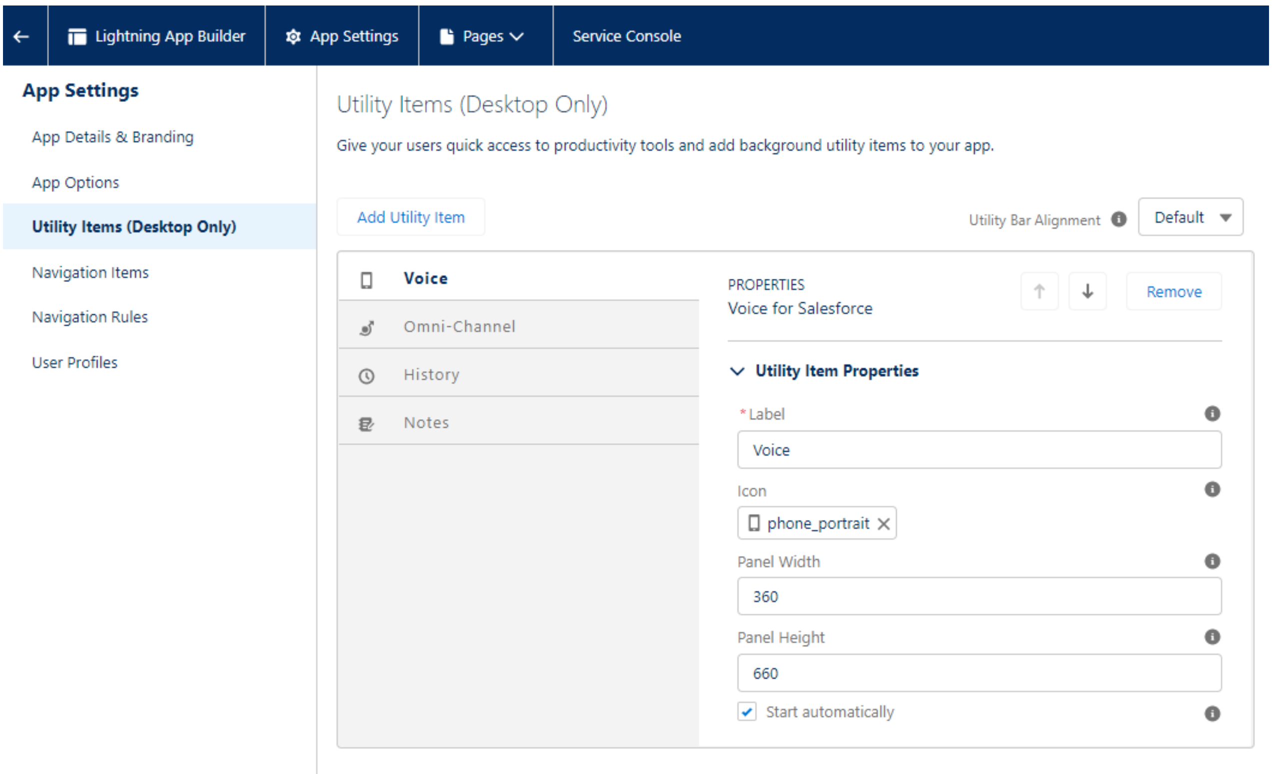
Edit

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

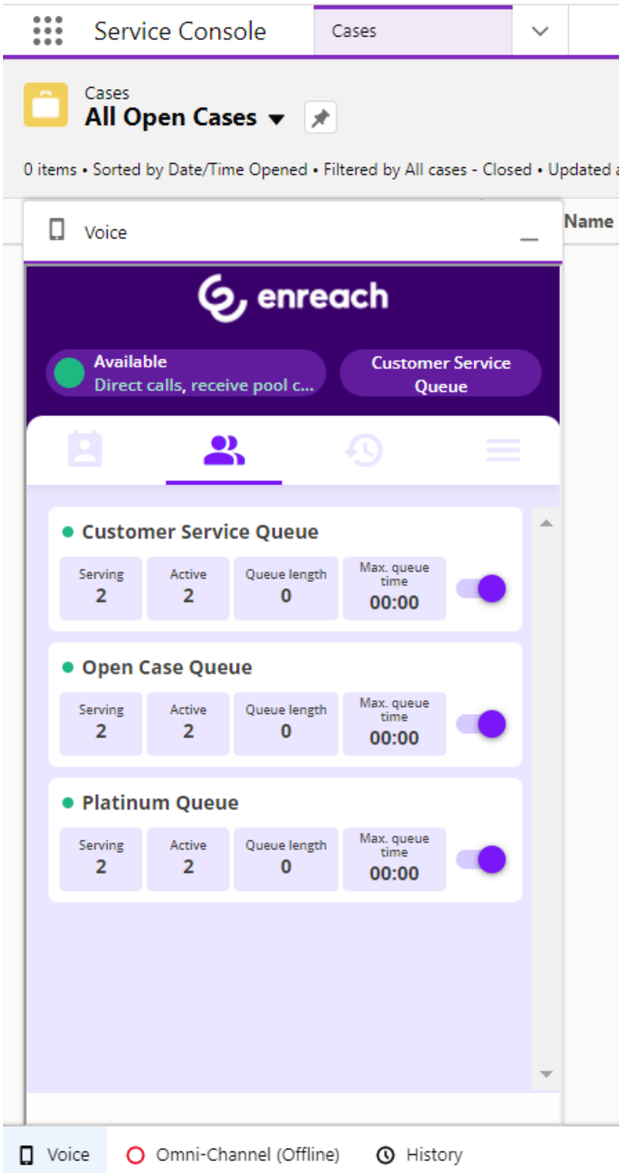


e. In Voice for Salesforce view

a. name it (label) Voice (can be anything you like) b. In Icon option, change it to 'phone_portrait' c. Panel Width 360 and Panel Height 660 d. Verify that 'Start automatically' is checked to enable automatic login to the webphone e. Save the settings



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



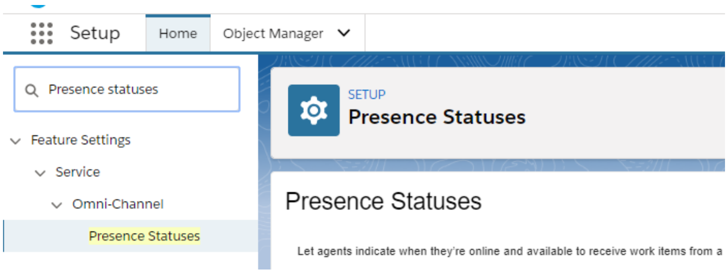
1.8 System Presence Statuses configuration

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

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

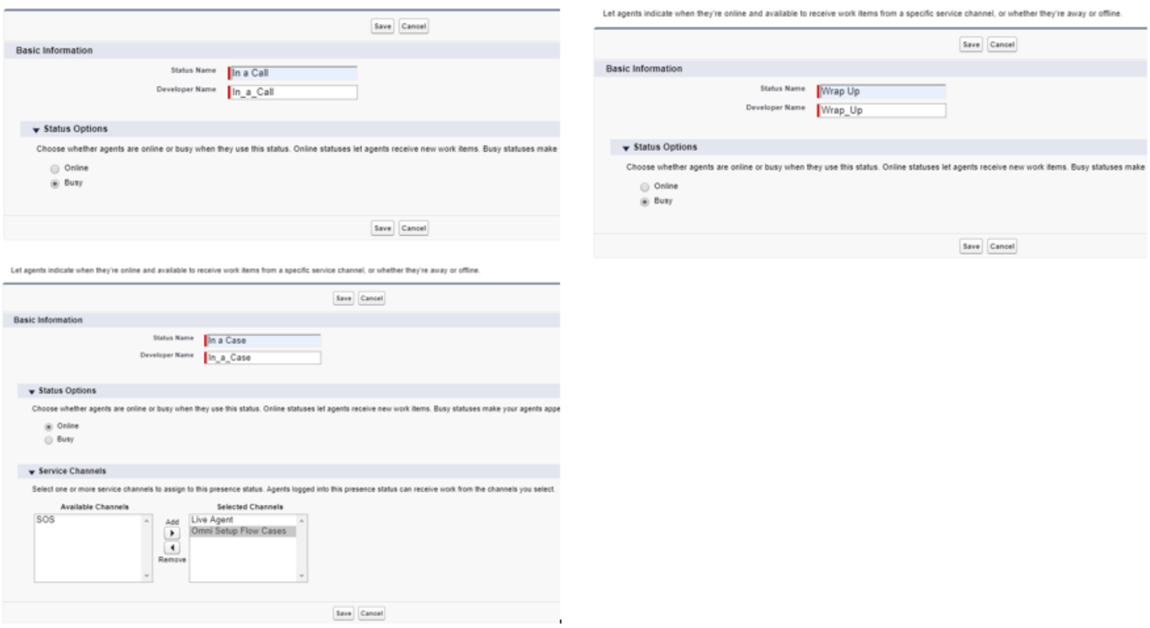
These will provide built-in “In a Call”, “Wrap Up” and “In a Case” availability handling.

a. Go to Presence Statuses

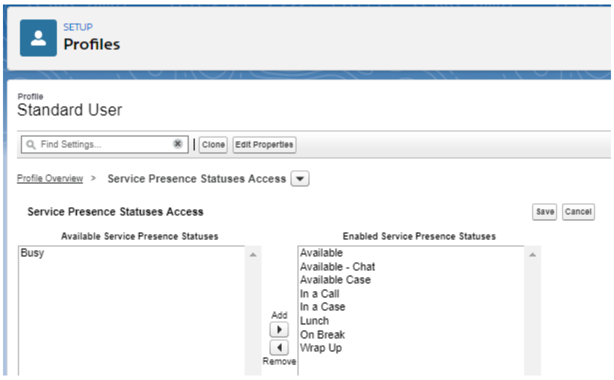


b. Add the following three system presence statuses as described below. Note: Developer name MUST be exactly as described below. Status Name can be different.

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



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



2 End user configuration

This configuration shall be applied for every Voice for Salesforce end user.

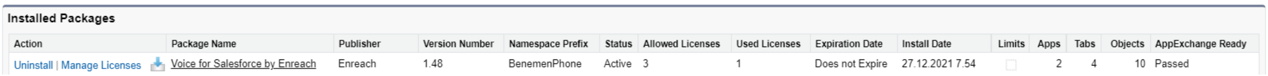
Please note that users need to have object level Read and Edit permissions for Case and Task objects granted by Profile or a separate permission set. The Voice for Salesforce permission set grants the permissions only on field level.

2.1 Voice for Salesforce license assignment

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

If **User License** is used, Voice for Salesforce end user license assignment is required via

- Installed Packages -> Voice for Salesforce by Enreach -> Manage licenses



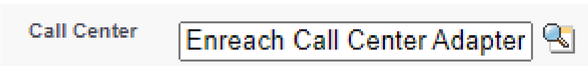
Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall | Manage Licenses	Voice for Salesforce by Enreach	Enreach	1.48	BenemenPhone	Active	3	1	Does not Expire	27.12.2021 7.54		2	4	10	Passed

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

2.2 Add Enreach Call Center Adapter to end users

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



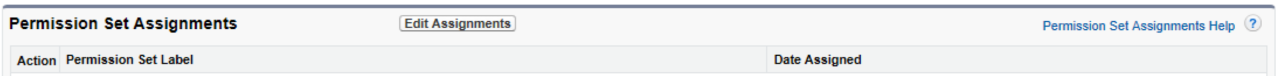
Call Center Adapter is used to activate click-to-dial functionality. If click-to-dial is not getting activated, please complete additional configuration described in Chapter 4.2 .

2.3 Permission set, add Voice for Salesforce Softphone to end users

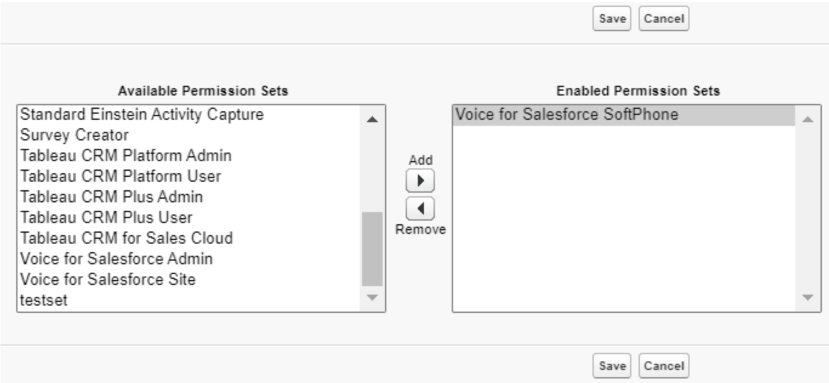
Add Voice for Salesforce SoftPhone permission set to end users.

Via specific end user settings

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



d. Add Voice for Salesforce SoftPhone and Save

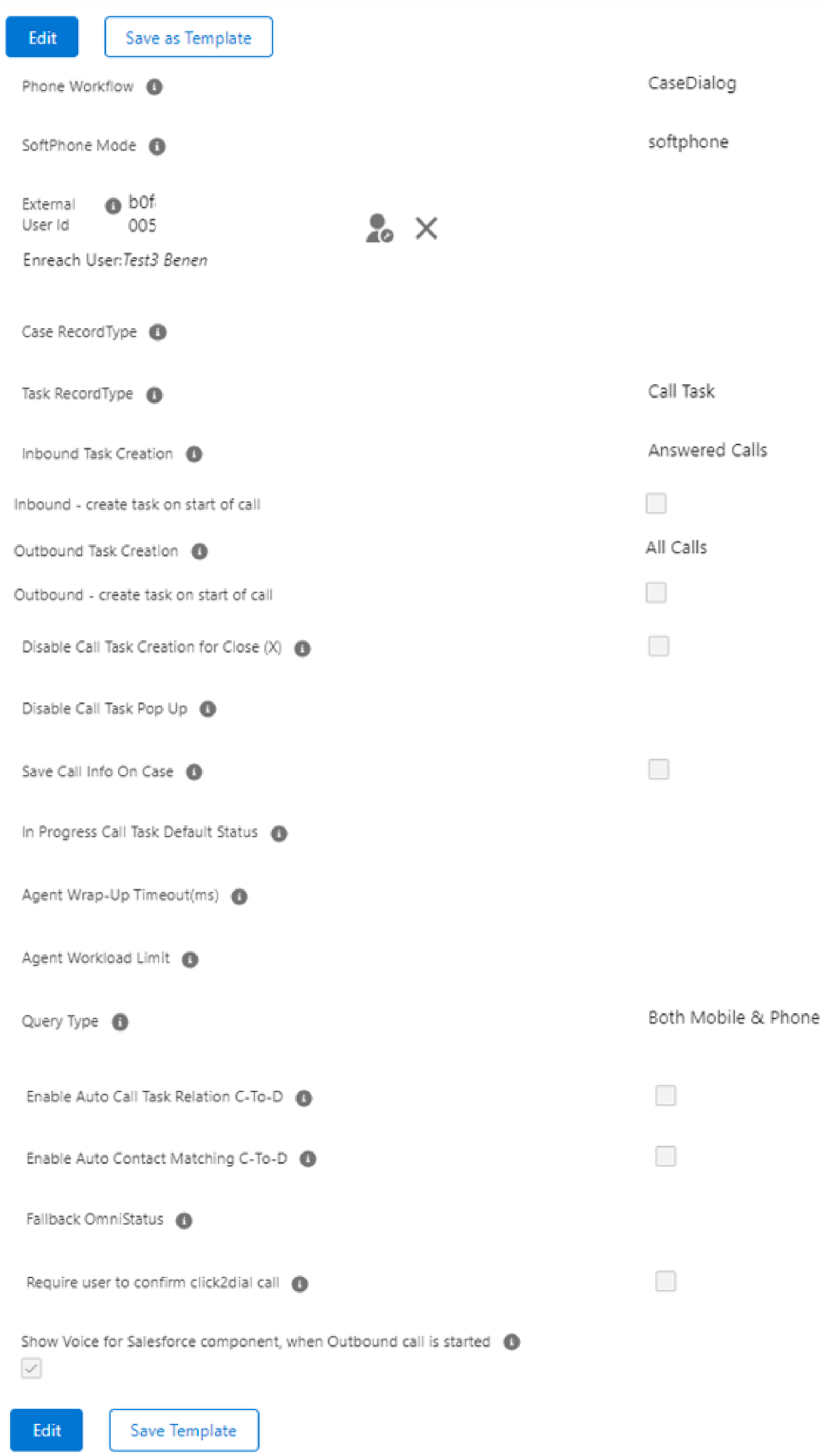


Bulk assignment via Permission Sets view

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

2.4 Voice for Salesforce – Users Configurator

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

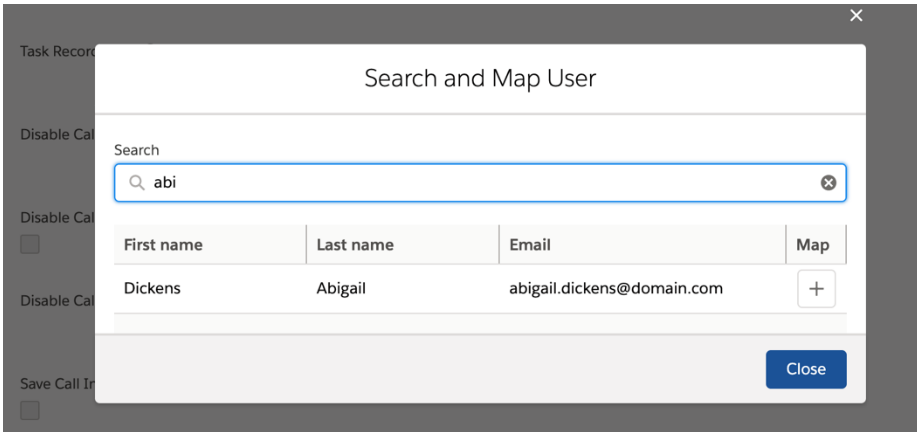

Edit
Save as Template
Phone Workflow
CaseDialog
SoftPhone Mode
softphone
External User Id
b0f
005
Enreach User: Test3 Benen
Case RecordType
Task RecordType
Call Task
Inbound Task Creation
Answered Calls
Inbound - create task on start of call
Outbound Task Creation
All Calls
Outbound - create task on start of call
Disable Call Task Creation for Close (X)
Disable Call Task Pop Up
Save Call Info On Case
In Progress Call Task Default Status
Agent Wrap-Up Timeout(ms)
Agent Workload Limit
Query Type
Both Mobile & Phone
Enable Auto Call Task Relation C-To-D
Enable Auto Contact Matching C-To-D
Fallback OmniStatus
Require user to confirm click2dial call
Show Voice for Salesforce component, when Outbound call is started
Edit
Save Template

2.4.1 Map Enreach cloud user account

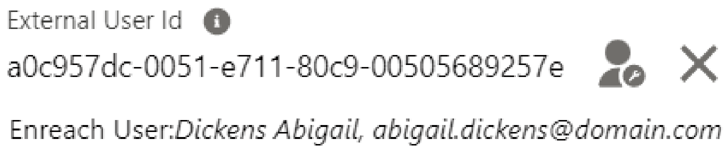
External User Id

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

If there is not Enreach User found with the Salesforce User email, then the mapping needs to be done manually by clicking the icon. Search and Map User window will pop-up. You can search for the Enreach Users with email or name.



Click the + icon to map the user.



2.4.2 Configure User settings

Click Edit and configure wanted user specific settings for each user. Please find descriptions of the different settings below.

Phone Workflow

Four different workflow options. One must be selected.

- Case: Automated case creation without contact dialog. Targeted for quick case creation. Requires console navigation type of Lightning app for popping up chosen / new cases.
- CaseDialog: New & Existing Case handling with contact dialog. Targeted for contact identification and case handling. Requires console navigation type of Lightning app for popping up chosen / new cases.
- Contact&Account: Contact & Account identification and screen pop-up.

- Contact&Lead: Contact identification. New Lead handling for not identified contacts.

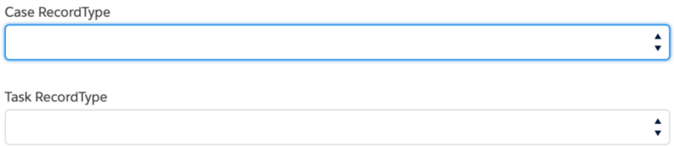
Important notes: Case and CaseDialog involves automated Case creation. Please see [additional tenant level configuration](#) .

Softphone Mode

lync: if Enreach integrated Lync / Skype for Business is used as softphone (legacy, for special use case)
softphone: if Voice for Salesforce web phone / Voice for Windows is used as softphone (default)

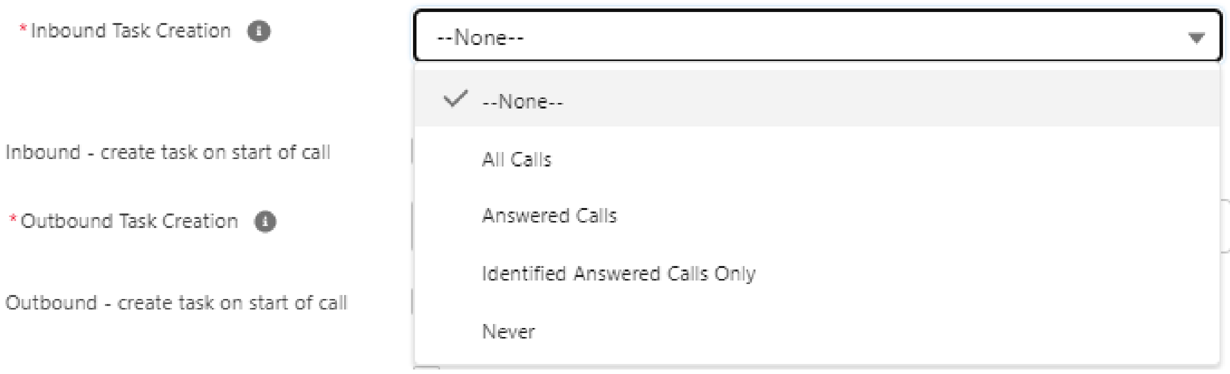
Case and Task RecordType

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



Inbound Task Creation

By default Call Task Activities are created for all type of incoming calls.
Use provided options to limit task creation only for described type of calls.

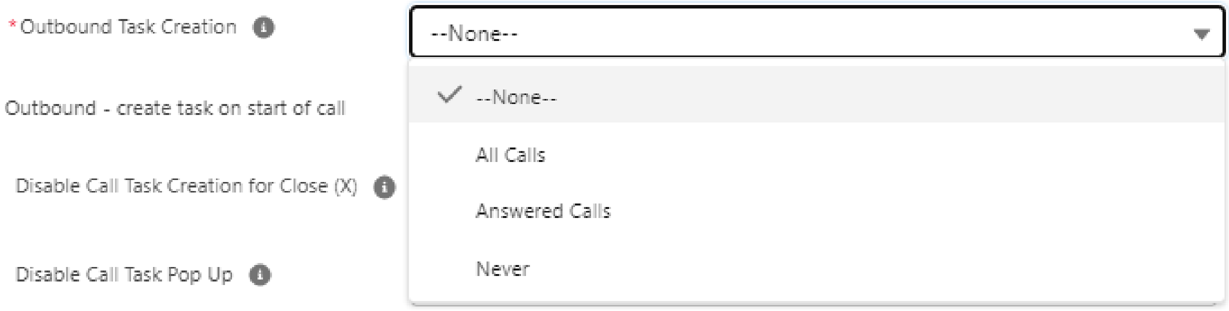


Inbound – create task on start of call

By default Call Task Actiity is created when call is ended. Enable this option if you would like that the task is created on start of the call when call is answered / phone workflow completed in the beginning of the call

Outbound Task Creation

By default Call Task Activities are created for all type of outbound calls.
Use provided options to limit task creation only for described type of calls.



Outbound – create task on start of call
By default Call Task Actiity is created when call is ended. Enable this option if you would like that the task is created on start of the call when call is answered by remote party.

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/focus will be displayed after each call for further editing (if and when call task is created)
Use provided options to disable call task activity pop-up/focus 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 Sec, Advanced Call Details and Phone From.
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 Enreach 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.

Require user to confirm click2dial call

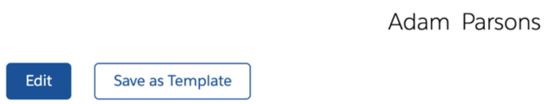
By default click-to-dial outbound call is started automatically when value in Phone data type of Salesforce field is clicked. By enabling this feature, user will get additional pop-up window to confirm or cancel outbound call.

Show Voice for Salesforce component, when Outbound call is started

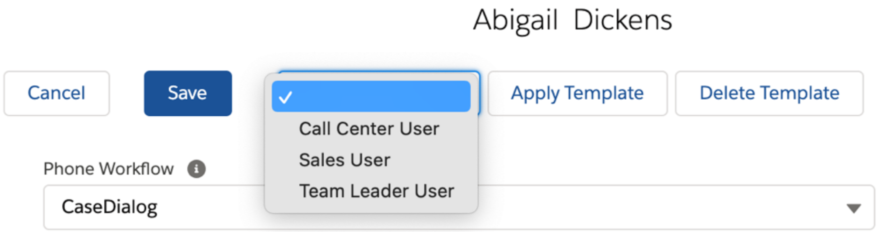
When enabled, embedded webphone utility item will automatically open up when click-to-dial outbound call is started.

2.4.3 Use configuration templates

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



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



2.5 Permission set, add Voice for Salesforce Admin for required admins and users

You may add 'Voice for Salesforce Admin' permission set for possible users who needs to be able to access Voice for Salesforce configurator app.

2.6 Permissions for Custom Fields on Activity Object

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

3 Additional information and configuration options

3.1 Optional: Modify Voice Task and Case layouts

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

3.2 Phone number matching logic

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

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

3.3 Error logs

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

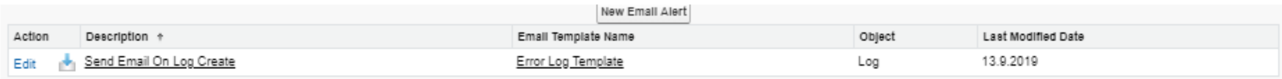
New Rule

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

Workflow Actions -> Email Alerts are used to control actual email sending process and recipients.

The following Email Alert is configured by the package and by default error messages are emailed to salesforcelogs@enreach.com email address.

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



New Email Alert

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

4 Known issues and workarounds

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

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

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

There are two workarounds:

- Disable the options
- Keep the options enabled and add the following to the Whitelisted Domains
  https://<my domain>.my.salesforce.com
  https://<my domain>.lightning.force.com

4.2 Click-to-Call is not working / disabled

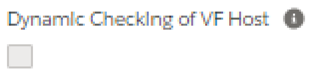
Complete the following steps to resolve the issue.

1. Go to to Setup -> Visualforce Pages
2. Find and click Softphone2 and go to Preview
3. On Preview browser page copy the URL without last two characters (#/) to clipboard (e.g. https://<customer org>.benemenphone.vf.force.com/apex/SoftPhone)
4. Go to Setup -> Call Centers –> Enreach Call Center Adapter -> Edit
5. Replace text in "CTI Adapter URL" by the copied URL (e.g. https://<customer org>.benemenphone.vf.force.com/apex/SoftPhone)
6. Save settings

7. Test again that click-to-call is now active and works

4.3 Failed – Voice for Salesforce notification keeps appearing for users

To fix the issue, Admin can safely disable "Dynamic Checking of VF Host" option via Voice for Salesforce app --> Tenant

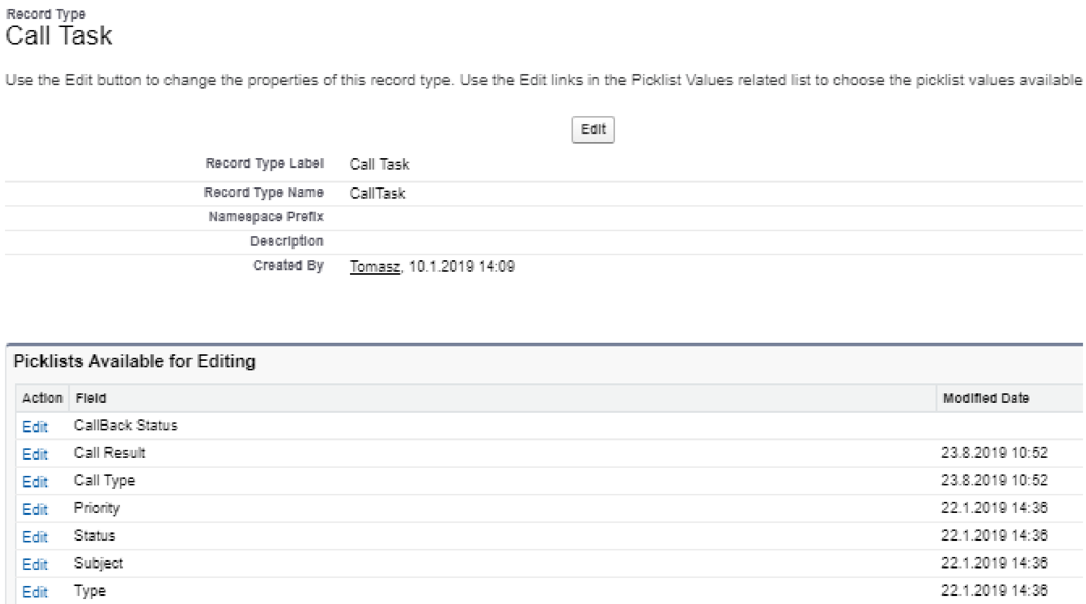


4.4 Workflow is not creating / opening Case or Task objects

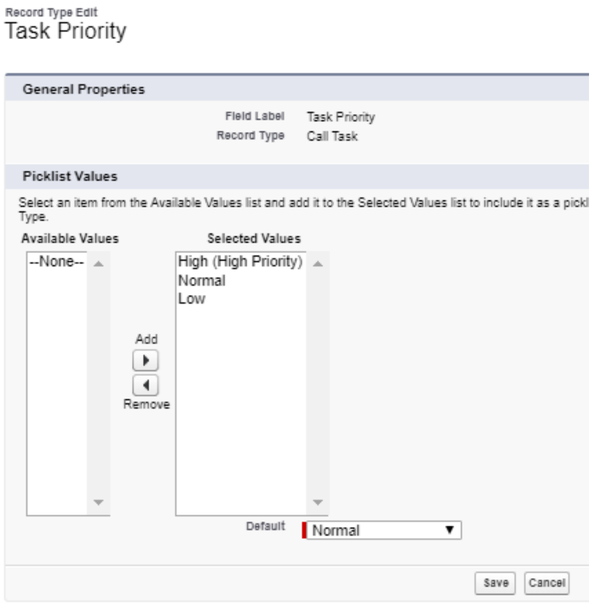
Customer may have some tenant level configuration for required Case / Task fields and default values. This may cause Voice for Salesforce created Case and Task objects not to have these required fields fully configured and default values set, so that automated creation could work on the background.

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

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



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



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

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

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

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

4.6 Embedded webphone is not loading

If this happens only to random users, then root cause is typically user configuration related. i.e. ensure that user is correctly activated for Voice for Salesforce and that External UserID mapping is accordinfly set. If the problem continues then continue with end user side of troubleshooting. i.e. that microphone is allowed in browser page and that end user computer have healthy internet connectivity.

If the issue happens system wide, then the first thing to check on Salesforce side is to check that Visualforce Host URL hasn't changed. Such change can happen e.g. is Salesforce instance has migrated to different location or some planned Salesforce platform update, e.g. Enhanced Domains.

Please see Tenant Configuration -> Visualforce Host URL for details how to check and modify this.