

VOICE FOR SALESFORCE BY ENREACH Configuration guide

Version 1.50



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

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

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

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

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)



Insta By Enre	all Voice fo	r Salesforce by En	reach
Install for	R Admins Only	Install for All Users	Install for Specific Profiles Install Cancel
App Name	Publisher	Version Name	Version Number
Voice for Salesforce b	by Enreach Enreach	1.48	1.48
Additional Details	View Components		

 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

 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.



App Lau	incher		Q Voice for Salesforce	0
✓ All App	25			
énreach	Voice for Salesforce App to configure Voice for Salesforce by	00 00 00 00		

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



•••• V	/oice fo	r Salesforce	Voice for Sale	sforce Configuration					, de
Tenant	Users	Search & Info fields	Blacklist	Presence Status Configuration	CallBack	Smart Routing	Enterprise Calls	Service Calls	
									6
									enreach
Configu	uration Nan	ne			Discovery UR	0			
Enreac	h								
Dynami	ic Checking	of VF Host 🚯			API Endpoint	URL 🕕			
Visualfo	orce Host U	IRL 🕚			Voice Center	URL			
					API Authoriza	tion Token 🕚			
Voice fo	or Salesford	e System User Name	D		Enter The	New Authorization	Token		
					Default Agen	t Workload Limit 🔳			
Advanc	ed Call Det	ails 🕚							
					Default Agen	t WrapUp Timeout	0		
Search	type for Ac	counts and Contacts							
Form	ula Fields			•					
Enable	automated	call task object relation	for click-to-dia	0	Advanced	Configuration			
Enable	automated	contact matching for c	ick-to-dial 🚺						
Cance	el	Save							

- 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: <u>https://customerorg--benemenphone.vf.force.com</u> 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.



Advanced Configuration Settings

Use Account Override 🔹	
Use Contact Override 🚺	
Use Lead Override 0	
Schedule job to update task information 0	
Custom URL for the WebRTC 0	
	ОК

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 account 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	2	2
Contact Name	V	V

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

• Call Task Activities are recommended method saving call details.

However with Case and CaseDialog phone workflows, call details can also be saved directly in the worked Case object. **If selecting 'Save Call Info On Case' option**, please remember to add wanted call detail fields to the used **Case layout via Object Manager**. Relevant call info fields: CallEndTime, Call Duration, Call Result, Phone Number 2, Call Type, Service Pool Queue, Queue Wait Time 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
Case field API name or related object with case relation API name (dot notation)
Fleid API name
Subject
Related object API name

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

Five recent case	es are displayed, se	arch for more	nobile Q	Choose	
Case Number	Account Name	Subject	O0003273 Low Phone Subject: Mobile application Inquiry	e Origin Booking Number	
00003329	BenemenDemo	CallBack - 28	00001960 Medium Phone Subject: Mobile application inquiry	ne	Choose
00003328	BenemenDemo	CallBack - 27		Jne	Choose

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

Additional Search strings: 🚺		
Contact field API name or related object Fleid API name	t with contact relation API name (dot notation	ı) 🚯
Name		
Related object API name		
Bookingc.Contactc		
Call Dispo	osition - +3584578818164	
O123457 Q Justin Case BenemenDemo Director Justin.case@benemen.com Platinum BookingNumber: 0123457 New Case	Cho	
		Close

Additional Info fields:

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



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

Examples:

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

Addition Fleld API	al Case colu name	imns							
Priority	y;Origin;Boo	kingr.Name							
		Justin Case Bene	- menDemo Di	rector justin.cas	e@benemen	.com P	Platinum		
ive recent cas	es are displayed, se	arch for more C Search					Q Choo		
ase Number	Account Name	Subject	Created Date	Last Modified Date	Name Status	Priority	Case Origin	Booking Number	
0003329	BenemenDemo	CallBack - 28.08.2019 11:27	28.8.2019 11:27	28.8.2019 11:27	Mikko New	Medium	Phone		Choose
0003328	BenemenDemo	CallBack - 27.08.2019 15:06	27.8.2019 15:06	28.8.2019 8:08	Mikko Closed	Medium	Phone		Choose
0002164	BenemenDemo	Problem with delivery	15.5.2019 15:57	28.8.2019 8:07	Lisa C Escalated	High	Email		Choose
0002271	BenemenDemo	Booking inquiry	16.5.2019 15:05	28.8.2019 8:06	Pekka Closed	High	Phone	0123457	Choose
002358	BenemenDemo	Renewal #229944	20.5.2019 13:51	28.8.2019 8:06	Pekka Working	High	Phone		Choose
New Case									
									Close

 Additional Contact columns

 Fleld API name

 Title;Email;Account.SLA__c

 Call Disposition - +3584578818164

 Image: mage: mage:

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.

level for



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

Voice f	or Salesforce	Voice for Sale	sforce Configuration						
Tenant Users	Search & Info fields	5 Blacklist	Presence Status Cor	nfiguration	CallBack	Smart Routing	Enterpris	e Calls	
									6 enreach
Omni Presen	se Status 🕚	Enread	h Cloud Presense Stat	tus	Enreach Clo	oud Presense Stat	us Type	To be deleted	
		*			•				
Available, Onlir	ie	+ Availab	e		Available		\$		
		*							
Lunch, Busy		t Lunch			OffWork		\$		
Cancel	Add Config Dele	te selected ma	ppings Save Map	pings					

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 <u>System Presence Statuses configuration</u> for additional required system presence statuses configuration.

OmniChannel Fallback Status

If the correct OmniChannel presence status can't be determined the presence status will be reverted to the Fallback Status. Fallback status can be set on the User Configuration



page for each user in the selection "Fallback OmniStatus". If left empty "Offline" will be used.

1.4.5 Blacklist Configuration

This is optional configuration, where Admin can add phone numbers excluded from possible workflow actions and call task activity creation. E.g. not creating Case / not opening contact, etc. Note: phone numbers must be created in E.164 format e.g. +358401234567.

Number can by added by Range or CSV option. CSV with comma or semi-colon separator if adding multiple numbers at once.

Blacklisted Task Enabled:

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

Voice for Salesforce	Voice for Sale	sforce Configuration		17 - 1111 - 2212 -	- 411-17 XXVXXX JB077	8 1995-2111 - 2222 - 1111 1 1 November 1997
nant Users Search & Info field	s <u>Blacklist</u>	Presence Status Con	figuration CallBack	Smart Routing	Enterprise Calls	n Ci Chiezawa i Animerika I
Blacklisted Task Enabled Mode CSV Range						enreach
*Number Blacklist						

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.



BeneVoice	All 💌 🤇	A Search Salesforce			* 🖬	? \$ # 🐻
Tenant Users Searce Create new configurat CALL BACK CONFIG Benemen default	th & Info fields Blackilst tion SURATION NAME	Presence Statuses Configuration	CallBack	Smart Routing	Enterprise Calls	benemen

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

* Enreach	n CallBack	Configura	tion Name	

3. Select wanted CallBack Flow

Do you want to create callback request in Salesforce as Task, Task related to Case OR Case?

	CallBack Flow	_
-	Task	;]
	Task	
	Task related to Case	٦
	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.

allBack Age Time Unit		
Hours		÷
Hours		
Days		
allBack Age		

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.



Enreach Cloud CallBack List Name



6. Select Salesforce Record Type for Case or Task

Salesforce RecordType	
CallBack	\$

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

Salesforce Queue Name		
International - Escalations	1	

- 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>"

Subject CallBack - 28.08.2019 11:27

- Callback Case / Task specific fields are
 - CallBack Channelln , name of voice queue customer left callback request
 - o 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 ∨	PackageState 🗸 🗸	Package Name 🗸 🗸	Last Modifi 🗸	Last Modifie 🗸	
SmartRouting_Dispatcher_Templ	Autolaunched Flow	1	1	Managed-Installed	Benemen Cloud CTI	Mikko Silonsaari	27.11.2019 14:50	•
SmartRouting_Scenario_Template	Autolaunched Flow	~	~	Managed-Installed	Benemen Cloud CTI	Mikko Silonsaari	27.11.2019 14:49	-

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

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.



Voice for Salesforce	Voice for Salesforce Configuration
Tenant Users Search & Info field	s Blacklist Presence Status Configuration CallBack Smart Routing Enterprise Calls
	6 enreach
Enterprise Calls are call details from cal mobile calls, service calls, Voice for Tea	Is handled in Enreach Cloud with other devices than Voice for Salesforce by Enreach. The data can include call details from direct ms by Enreach calls etc.
Do not link Cases/Task to Contact	or Person Account
JOB TYPES	Enterprise Call process is disabled
One-Time Job	
	Enterprise Call Record Object 🕐 Task
	Salesforce RecordType
	Enterprise Call Job for Direct Calls
	Enterprise Call Record Owner 🕚
	Enterprise Call Record Default Status 🕚
	Enterprise Call Job Direct Calls Call Result Value 🚯
	Create Record if Multiple Matches 0
	Edit Start job Stop Job

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.

Voice for Salesforce	Voice for Salesforce Configuration			1
Tenant Users Search & Info fields	Blacklist Presence Status Configuration C	allBack Smart Routing Enterp	orise Calls Service Calls	11723 W. L. ANNO MALE
				6 enreach
JOB TYPES ()	Service Call process is disabled	8		
Continous Job 👔	Service Call Result Value			
One-Time Job 👔	Service Call Record Object 🕚 Task			
	Salesforce RecordType 🚯 CallTask			
	Service Call Record Default Status 🕦 Completed			
	Service Call Default Owner 🕕 Mikko Testing			
	Create Record if Multiple Matches 🕚			
	Create Record on not identified Contact 🚯			
	Create Service Calls only for selected queues			
	Enreach Cloud Queue Name	✓ Enreac	h Cloud Queue Id	~
	Customer Service Queue	78fad2	2e-7ff6-ea11-b81f-0050569e6df2	
	Platinum Queue	1c1772	:67-80f6-ea11-b81f-0050569e6df2	
	Edit Start job Stop Job			

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.

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

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

111.1167555 - 2116 9 V	AWA (6255) 2016 9 YAWA (621	$1 \rightarrow 2 / 6 9 $		2016 9 Y ~ M/2 (22
Details	Edit Page Layout Assignment			Help for	his Page
Fields & Relationships	The table below shows the page layout assignm and drag to select a range of adjacent cells. Us	nents for different record type e CTRL + click to select multij	and profile comi ble cells that are	nations. Use SHIFT + c not adjacent. Then choo	ick or cli se a new
Case Page Layouts	page layout from the drop-down.				
Case Close Page Layouts	Save	Cancel			
Lightning Record Pages	Page Layout To Use: C	ase CallBack 🔻	32 Selected	32 Changed	
Buttons Links and Actions		Record Types		(1-	2 of 2)
	Profiles	Master		CallBack	
Community I according	Analytics Cloud Integration User	Case Layout		Case CallBack	
compact Layouts	Analytics Cloud Security User	Case Layout		Case CallBack	
	Chatter Only User	Case Layout		Case CallBack	
Field Sets	Company Communities User	Case Layout		Case CallBack	
	Contract Manager	Case Layout		Case CallBack	
Object Limits	Custom: Marketing Profile	Case (Marketing) L	ayout	Case CallBack	
	Custom: Sales Profile	Case (Sales) Lay	out	Case CallBack	
Deserd Turnes	Custom: Support Profile	Case (Support) La	yout	Case CallBack	
Record Types	Customer Community Login User	Case Layout		Case CallBack	
	Customer Community Plus Login User	Case Layout Case Layout		Case CallBack	
Related Lookup Filters	Customer Community Plus User			Case CallBack	
	Customer Community User	Case Layout		Case CallBack	
Search Layouts	Customer Portal Manager	Case Layout		Case CallBack	
	Customer Portal Manager Custom	Case Layout		Case CallBack	
Hiorarshy Columns	Customer Portal Manager Standard	Case Layout		Case CallBack	
Hierarchy Columns	Force.com - Free User	Case Layout		Case CallBack	
	Gold Partner User	Case Layout		Case CallBack	
Triggers	High Volume Customer Portal	Case Layout		Case CallBack	
	High Volume Customer Portal User	Case Layout		Case CallBack	
Validation Rules	Marketing User	Case Layout		Case CallBack	
	Overage Customer Portal Manager Custom	Case Layout		Case CallBack	
	Overage Customer Portal Manager Standard	Case Layout		Case CallBack	
	Overage High Volume Customer Portal User	Case Layout		Case CallBack	
	Partner Community Login User	Case Layout		Case CallBack	
	Partner Community User	Case Layout		Case CallBack	
	Partner User	Case Layout		Case CallBack	
	Read Only Service Claud	Case Layout		Case CallBack	
	Service Cloud	Case Layout		Case CallBack	-
	Solution Manager	Case Lavout		Case CallBack	



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

	OMARTES XIG 9 YOMART	157 <u>M</u> K 91		
letails	Edit Page Layout Assignment Task			Help for this Page
ields & Relationships	The table below shows the page layout assignment of adjacent cells. Us	nents for different rec	ord type and profile comb	inations. Use SHIFT + click or c
age Layouts	page layout from the drop-down.	e o i rel + click to sel	continuitiple cells that are i	not aujacent. Then choose a ne
ghtning Record Pages	Save	Cancel		
uttons, Links, and Actions	Page Layout To Use: C	allBack Layout	▼ 41 Selected	41 Changed
ampact Lavouts		Record Types		(1-3 of 3)
Shipact Layouts	Profiles	Master	CallBack	Call Task
	Analytics Cloud Integration User	Task Lavout	CallBack Lavout	Call Layout
eld Sets	Analytics Cloud Security User	Task Layout	CaliBack Layout	Call Layout
	Authenticated Website	Task Layout	CallBack Layout	Call Layout
bject Limits	Authenticated Website	Task Layout	CallBack Layout	Call Layout
1	Chatter External User	Task Layout	CallBack Layout	Call Layout
acord Turner	Chatter Free User	Task Layout	CallBack Layout	Call Layout
ecord Types	Chatter Moderator User	Task Layout	CaliBack Layout	Call Layout
	Chatter Only User	Task Layout	CaliBack Layout	Call Layout
earch Layouts	Company Communities User	Task Layout	CallBack Layout	Call Layout
	Contract Manager	Task Layout	CaliBack Layout	Call Layout
iggers	Cross Org Data Proxy User	Task Layout	CeliBeck Levout	Call Layout
	Custom: Marketing Profile	Task Layout	CaliBack Layout	Call Layout
NUM BI	Custom: Sales Profile	Task Layout	CaliBack Layout	Call Layout
alidation Rules	Custom: Support Profile	Task Layout	CallBack Layout	Call Layout
	Customer Community Login User	Task Lavout	CallBack Lavout	Call Layout
	Customer Community Plus Login User	Task Lavout	CallBack Lavout	Call Layout
	Customer Community Plus User	Task Lavout	CallBack Layout	Call Layout
	Customer Community User	Task Layout	CallBack Layout	Call Layout
	Customer Portal Manager	Task Layout	CallBack Layout	Call Layout
	Customer Portal Manager Custom	Task Lavout	CallBack Lavout	Call Layout
	Customer Portal Manager Standard	Task Lavout	CallBack Lavout	Call Layout
	External Identity User	Task Layout	CallBack Layout	Call Layout
	Force.com - Free User	Task Layout	CallBack Layout	Call Layout
	Gold Partner User	Task Lavout	CallBack Layout	Call Layout
	High Volume Customer Portal	Task Lavout	CallBack Layout	Call Layout
	High Volume Customer Portal User	Task Lavout	CallBack Lavout	Call Layout
	Marketing User	Task Lavout	CallBack Lavout	Call Lavout
	Overage Customer Portal Manager Custom	Task Layout	CallBack Lavout	Call Layout
	and a second s		0.00	

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 Exp	Ne	w Lightning App	New Connected		Арр		
14 item	ns • Sorted by App Name •	Filtered by TabSet Type						\$ •
	APP NAME 🕇 🗸 🗸	DEVELOPER NAME	DESCRIPTION	LAST MOD.	. V APP TYPE	~	vi ~	
1	App Launcher	AppLauncher	App Launcher tabs	29.3.2018 1	2:29 Classic		~	¥
2	Benemen SoftPhone	Benemen_SoftPhone	App with Benemen SoftPhone component.	10.4.2018 1	0:11 Lightning (M	anaged)	~	•
3	Benemen Softphone	Benemen_Softphone_Classic		10.4.2018 1	0:11 Classic (Man	aged)		¥
4	Community	Community	Salesforce CRM Communities	29.3.2018 1	2:29 Classic		~	¥
5	Content	Content	Salesforce CRM Content	29.3.2018 1	2:29 Classic		~	•
6	Force.com	Force_com	Start Here	29.3.2018 1	2:29 Classic		~	•
7	Marketing	Marketing	Best-in-class on-demand marketing automation	29.3.2018 1	2:29 Classic		~	•
8	Platform	Platform	The fundamental Lightning Platform	29.3.2018 1	2:29 Classic			
9	Sales	Sales	The world's most popular sales force automation (SFA) solution	29.3.2018 1	2:29 Classic			•
10	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	29.3.2018 1	2:29 Lightning		~	•
11	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	29.3.2018 1	2:29 Lightning		Edit	
12	Service	Service	Manage customer service with accounts, contacts, cases, and more	29.3.2018 1	2:29 Classic		Ĵ	
13	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service.	29.3.2018 1	2:29 Lightning		~	•
14	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and mana	29.3.2018 1	2:29 Classic		~	•

 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)



Utility Items (Desktop Only)	Add Utility Item
Navigation Items	
Navigation Rules	Q Voice 😢
User Profiles	✓ Custom (0)
	✓ Custom - Managed (7)
	Voice for Salesforce
	Voice for Salesforce Call Retrieving
	✓ Voice for Salesforce CallBack Conf
	✔ Voice for Salesforce Config
	✔ Voice for Salesforce Smart Routinc
	Voice for Salesforce Tenant Config
	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

← 🖬 Lightning App Builder	🕸 App Settings 🕒 Pages 🗸 Ser	vice Console
App Settings	Utility Items (Desktop Only	· · · · · · · · · · · · · · · · · · ·
App Details & Branding	Give your users quick access to produ	, ctivity tools and add background utility items to your app.
App Options		
Utility Items (Desktop Only)	Add Utility Item	Utility Bar Alignment 🕚 Default 🔻
Navigation Items	U Voice	PROPERTIES T
Navigation Rules	🕑 Omni-Channel	Voice for Salesforce
User Profiles	O History	✓ Utility Item Properties
	😰 Notes	*Label
		Voice
		Icon
		phone_portrait ×
		Panel Width
		360
		Panel Height 0
		660
		✓ Start automatically (1



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.

per Name: Wrap_Up
per Name: In_a_Case

Save Cancel			receive work mania noni a apacine auto	ce channel, or minimum and re array or o
Basic Information				Save Cancel
Status Name In a Call	Basic	Information		
Developer Name		Status Name	Wran Un	
11_0_001		Developer Name	Wrap Up	
Status Options				
Choose whether agents are online or busy when they use this status. Online statuses let agents receive new	vork items. Busy statuses make	Status Options		
Online		Choose whether agents are online or busy when	they use this status. Online statuses let	agents receive new work items. Busy sta
Busy		Online		
		· Busy		
Sava Connal				
				Save Cannal
I agents indicate when they're online and available to receive work items from a specific service channel, or whether they're av	ay or offline.			
Real Associ				
lasic Information				
Status Name In a Case				
In_a_Case				
- Status Ontions				
Choose whether anerth are reline or how when they use this status. Online statuses let anerth section new work items. B	av statuses make your asents appe			
Online	.,			
Busy				
Select one or more service channels to assign to this presence status. Agents logged into this presence status can receive	work from the channels you select.			
Available Channels Selected Channels				
SOS Age Live Agent				
Save				

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)



	_				
Profiles					
Profile Standard User	dit Pr	operties			
<u>Profile Overview</u> > Service Presence Statuses Service Presence Statuses Access	s Ac	cess	Tartha Carlo Davan Ata	s	ave Cancel
Busy	•	Add Remove	Available Available - Chat Available - Chat Available Case In a Case Lunch On Break Wrap Up	•	

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 Enreach Call Center Adapter
```

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 <u>Chapter 4.2</u>.

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

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

d. Add Voice for Salesforce SoftPhone and Save

	Save
Available Permission Sets Standard Finstein Activity Capture	Enabled Permission Sets
Survey Creator Tableau CRM Platform Admin Tableau CRM Platform User Tableau CRM Plus Admin Tableau CRM flus User Tableau CRM for Sales Cloud Voice for Salesforce Admin Voice for Salesforce Site estset	Add Add Remove

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 0 b0f. User Id 005 2 X	
Enreach Oser /ests 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 $\frac{1}{2}$ icon. Search and Map User window will pop-up. You can search for the Enreach Users with email or name.

Tack Docore				×
lask Record		Search a	and Map User	
isable Cal	Search			
	Q abi			⊗
Disable Cal	First name	Last name	Email	Мар
isable Cal	Dickens	Abigail	abigail.dickens@domain.com	+
avo Call Ir				Close
	_			

Click the + icon to map the user.

External User Id (1) a0c957dc-0051-e711-80c9-00505689257e

Enreach User:Dickens Abigail, abigail.dickens@domain.com

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

	\$
Task RecordType	
	\$

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 Task Creation 🚯	None	-
	✓None	
Inbound - create task on start of call	All Calls	
*Outbound Task Creation 🚯	Answered Calls	
Outbound - create task on start of call	Identified Answered Calls Only	
outboaria - create task on start of can	Never	

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

Inbound - create task on start of 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 Task Creation 🕚	None 💌
Outbound - create task on start of call	✓None
	All Calls
Disable Call Task Creation for Close (X)	Answered Calls
Disable Call Task Pop Up 🚯	Never

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.

Gatboaria - create task on start of car	Outbound -	create	task on	start	of	call
---	------------	--------	---------	-------	----	------

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 clickto-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.

	Adam Parsons			Adam Parsons
Edit Save as Template		Edit	Template Name	Save Template

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

Abigail Dickens

 Cancel
 Save
 Apply Template
 Delete Template

 Phone Workflow
 Image: CaseDialog
 Team Leader User
 Image: CaseDialog



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.

V 1.50



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

Clickjack Protection	
Enable clickjack protection for Setup pages [Enable clickjack protection for non-Setup Salesforce pages [Enable clickjack protection for customer Vsualforce pages with standard hea Enable clickjack protection for customer Vsualforce pages with headers disa	ders 👔
Milli Malada di Danamatan Kana Manan Jawa Sanana	
whitelisted Domains for Visualforce Inline Frames	
Allow iframes of Visualforce pages with clickjack protection on external domains. Protection.	To enable this feature, whitelist external domains where you allow framing. Then, turn on one of the "Enable clickjack protection for customer Visualforce pages" preferences under Clickjack
Enabling this feature is optional and doesn't change existing clickjack protection	
Whitelisted Domains	(Add Domain
No records to display	

There are two workarounds:

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

4.2 Click-to-Call is not working / disabled

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

Dynamic Checking of VF Host	0

Workflow is not creating / opening Case or Task objects 4.4

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 Record Type Call Task

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

Edit

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

Picklists Available for Editing			
Action	Field	Modified Date	
Edit	CallBack Status		
Edit	Call Result	23.8.2019 10:52	
Edit	Call Type	23.8.2019 10:52	
Edit	Priority	22.1.2019 14:38	
Edit	Status	22.1.2019 14:38	
Edit	Subject	22.1.2019 14:36	
Edit	Туре	22.1.2019 14:36	

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



Record Type Edit Task Priority

General Properties				
	Field Label	Task Priority		
	Record Type	Call Task		
Picklist Values				
Select an item from the Available Values list and add it to the Selected Values list to include it as a pickl Type.				
Available Values	Selected Values	5		
None Add	High (High Priority Normal Low			
Ŧ	Default	▼ Normal ▼		
		Save Cancel		

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

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

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

Additional info:

Chrome browser Developer Tools (F12) -> Console can help with initial troubleshooting to finding problematic fields.

Reproduce the issue in Chrome while Developer Tools -> Console is visible.

You should see possible error messages on red indicating field names with

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 <u>Tenant Configuration -> Visualforce Host URL</u> for details how to check and modify this.



