AES Open CTI Adapter for Salesforce User Document

Version 1.0

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About the Document

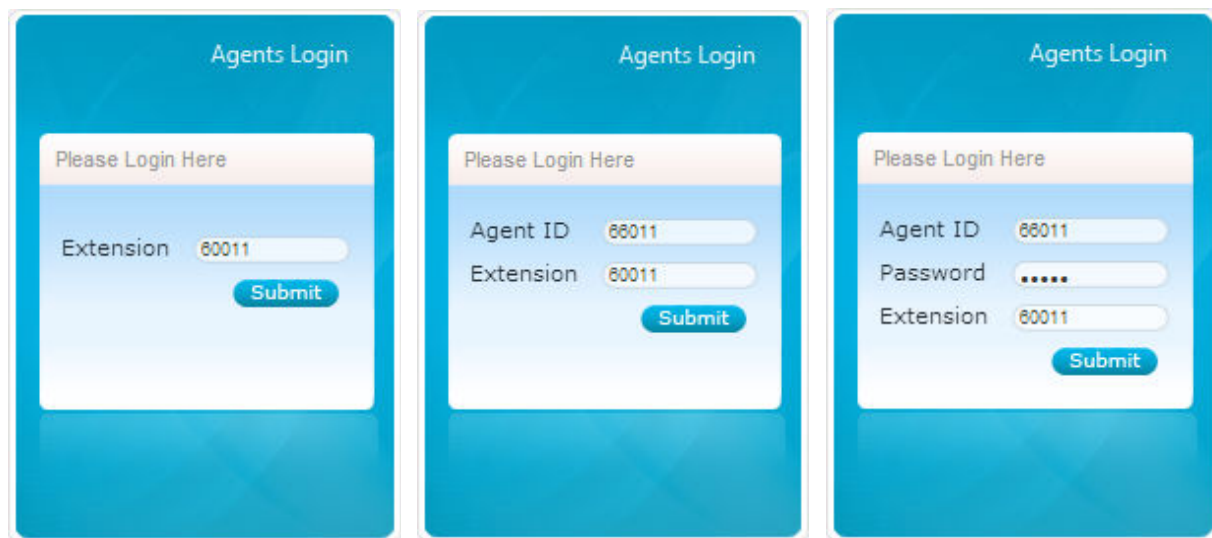This document details the use of the AES Open CTI Adapter for Salesforce.com.

Prerequisites

It is assumed that the Open CTI Adapter has already been installed and configured. Furthermore, it is assumed that the appropriate Salesforce user has already been assigned to the Call Center definition so that they may use the Open CTI Adapter in Salesforce.

Logging into the Open CTI Adapter

This chapter details the AES Open CTI Adapter installation procedure.

The first time the Open CTI Adapter is started for a user, after logging into Salesforce.com, it will display a completely empty Login dialog. The login dialog can have three forms: showing only "Extension", showing "Extension" and "Agent ID", or showing "Extension", "Agent ID", and "Password". If only "Extension" is shown, then the user will not be logged into the ACD and will only operate based on their phone number. They will not have any agent state, and will only get calls that are placed directly to their extension number. If "Agent ID" is shown, then the user is logged into the ACD and can get calls that are placed directly to their phone number or Agent ID, but also ACD calls that are queued to the skill in which the agent is assigned. "Password" can be either shown or suppressed depending on whether it is used or not.

Once a user has logged in once, the login credentials are saved in a browser cookie. The next time the user accesses the Open CTI Adapter by logging into Salesforce.com, those saved credentials will be used and the softphone will be logged into automatically. So, as long as a user continues to use the same workstation, they will only have to log into the Open CTI Adapter softphone once.

Do note that, because the credentials are stored in a browser cookie, if a browser's cookie information is deleted, the stored credentials will also be deleted, and the user will have to provide their login information again.

Change the Agent State

This chapter details the handling of the user's agent state in the Open CTI Adapter softphone. Do note that if the user is just a "phone user", then there is no agent state to manage, and this chapter will not be used. In place of the Agent State control, there is simply a logout button.

At the top of the Open CTI Adapter softphone is a pull-down list that both shows the user's current agent state, and allows the user to choose a new agent state. The full list of possible options is: Ready, Not Ready, New Reason, Wrapup, and Logout. Ready and Logout will always be present. The other three can be suppressed depending on how your administrator configures the Call Center Definition.
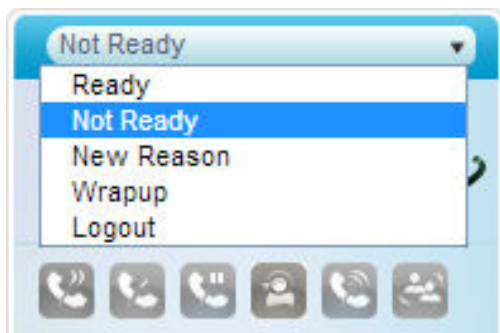

The Ready state represents either "Auto-In" or "Manual-In". Which it represents is also set in the Call Center Configuration. If Ready is shown in the pull-down list, it means the user is ready to take calls. If Ready is configured for Auto-In, it means that at the end of an ACD call, the user will be either immediately returned to the Ready state, or they will be temporarily placed into Wrapup for a pre-configured period of time. If Ready is configured for Manual-In, it means that at the end of an ACD call, the user will be placed into Wrapup. The user will then remain in Wrapup until they manually select Ready again.
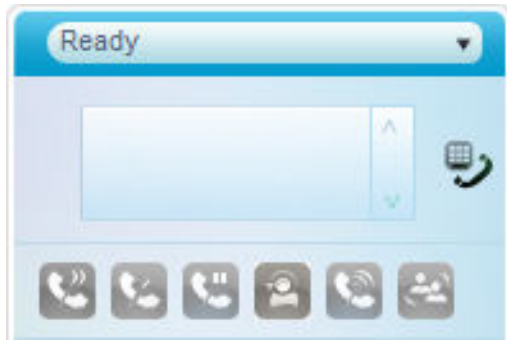
Not Ready state represents "Auxiliary Work" (or "AUX"). This means the user is doing something unrelated to taking calls that requires them to not receive calls. It is possible to also collect a reason code that signifies what that activity happens to be. If configured to collect a reason code, the Not Ready entry in the list will also show the reason for being not ready (if a reason has been selected). It can also be invoked during a call so that the call will end in not ready, instead of whatever the default state would be. It is possible that this option will not show because it has been suppressed in the Call Center Definition.

New Reason isn't really a state. When using reason codes with Not Ready, this option allows a new Not Ready reason code to be selected without leaving the overall not ready state. When the reason code is selected, the display of the Not Ready state will include the newly selected reason. This option will only be shown if Not Ready is enabled and reason codes are enabled in the Call Center Definition.
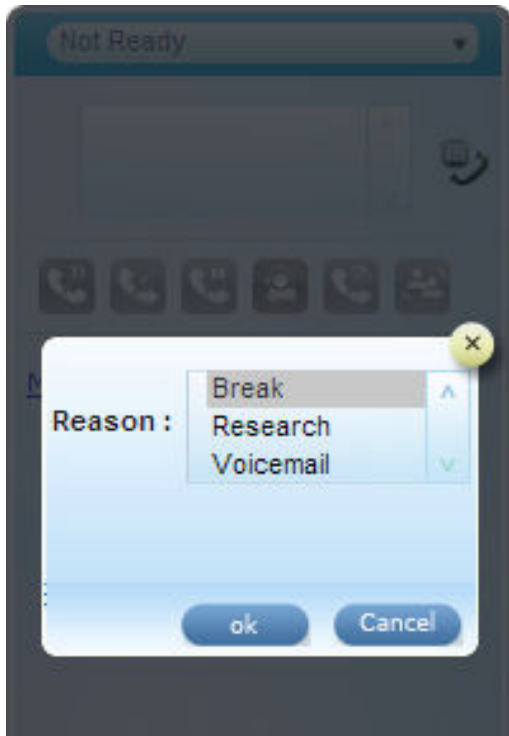
Wrapup state represents "After Call Work" (or "ACW"). This means the user is working on a call that is no longer active, but they are not yet ready to take a new call. This is generally used at the end of a call to allow for a user to continue working on a call that has ended. It is generally only invoked automatically based on the type of Ready configured. It can also be invoked during a call so that the call will end in wrapup, instead of whatever the default state would be. If Wrapup reason codes are enabled, the user will be prompted for a reason code when the call ends in the wrapup state. It is possible that this option will not show because it has been suppressed in the Call Center Definition.
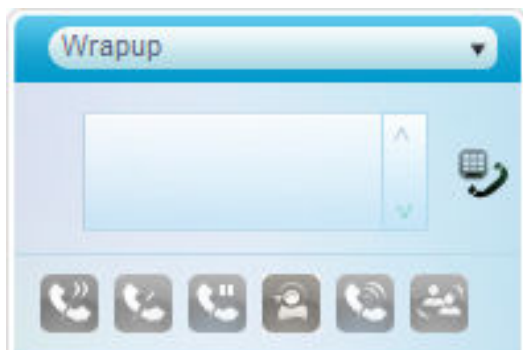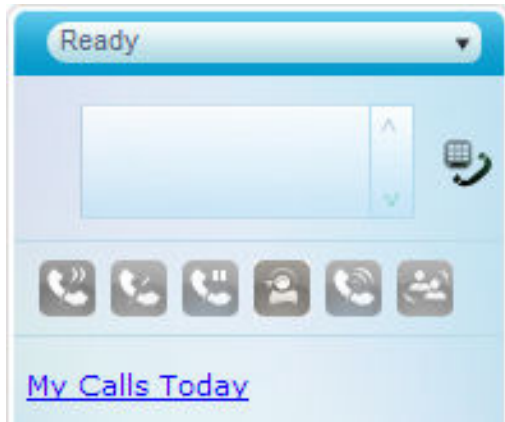

Logout Is used to log the user out of both the ACD and the softphone.

Handling a Call

This chapter details how to manage a call through the Open CTI Adapter softphone.

When the phone is idle, with no calls, the all of the call control buttons are disabled, and the call list box is empty. The one active button is the Make Call button.


When the agent receives a call, the Answer button is enabled and turned green. The user then answers the call by clicking the Answer button. When the call is answered, the Answer button will again be disabled, and the rest of the call control buttons will be enabled. Call information is displayed below the call control buttons and consists of the Caller ID and Dialed Number. If the call is an ACD call, the Queue value is also shown. If auto-answer is enabled (either in the Softphone or in the Communication Manager) then the first step above is skipped through extremely quickly, and the call is left in the answered state.
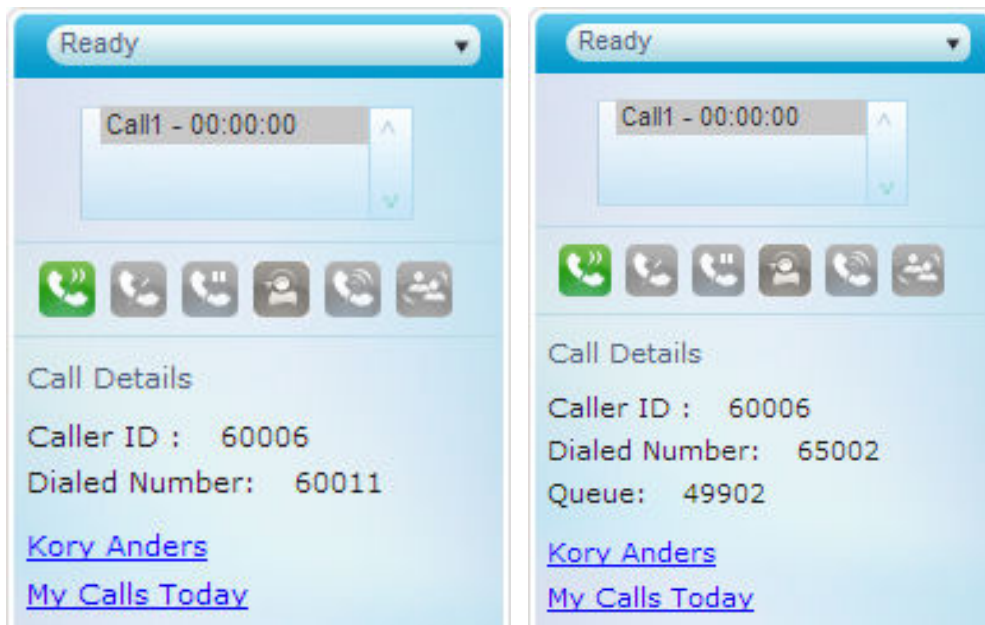

To place a call, the user can use either the Make Call button or Click-to-Dial. When the Make Call button is clicked, the user enters the destination number and clicks the OK button to place the call. To use Click-to-Dial, simply click any link-enabled phone number in the Salesforce application. When the user places a call, whether through the Make Call button or through Click-to-Dial, the Hang Up button is enabled

and turned red. Using the Hang Up button at this point will abandon the call and cancel the call attempt. When the other party answers the call, all of the buttons except for the Answer button will be enabled.
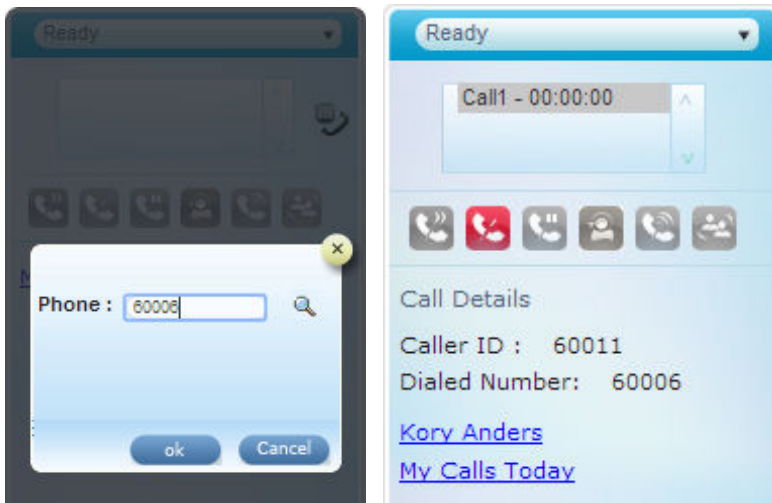

Once the call is answered (whether inbound or outbound), the call operates in the same way. Al of the call control buttons are enabled (except the Answer button). Plus, the Make Call button is transformed into a DTMF button. The DTMF button is used to send DTMF tones out the voice connection while the call is active. The other buttons are described below.
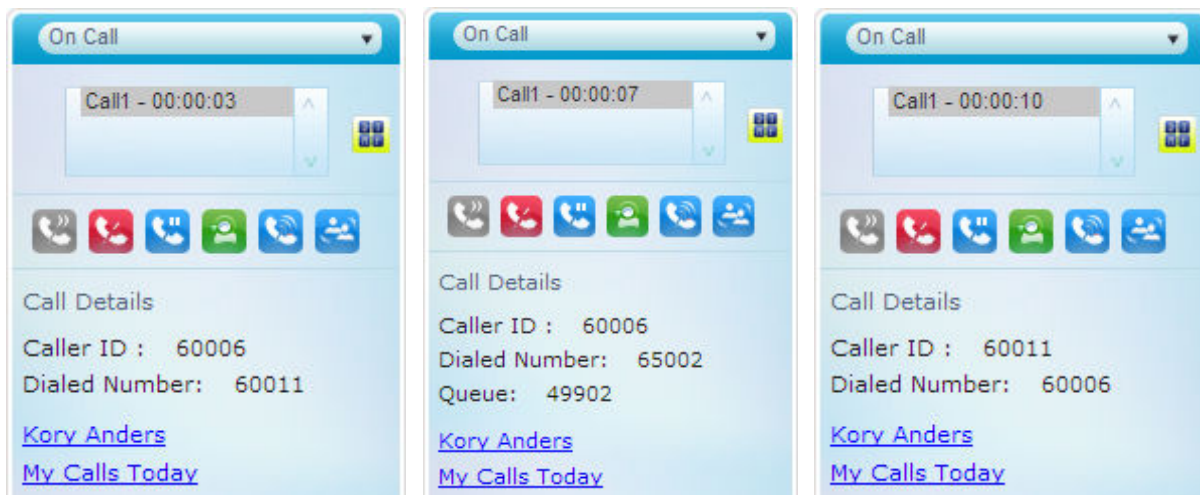

The Hang Up button is active anytime there is a ringing outbound call, or an answered call. Clicking the Hang Up button will end the call.

The Hold button is active on any answered call. Clicking the Hold button places the call on hold. After placing the call on hold, the other Call Control buttons will be disabled, except for the new Retrieve button that replaces the Consult button. Use the Retrieve button to bring the call back from hold. When retrieved from hold, the Call Control buttons again show they are on an answered call.
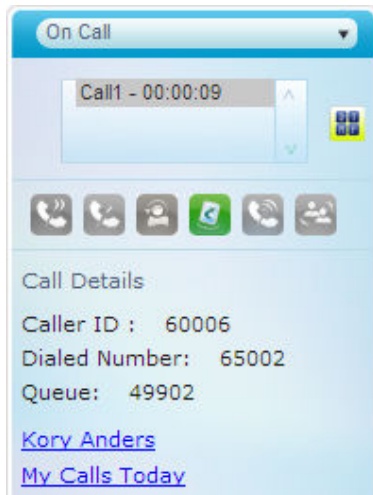
The Consult button is active on any answered call. Clicking the Consult button will prompt the user for a destination phone number. When selected, the current call will be placed on hold, and a new call will be placed to the destination phone number. The call make be converted into either a transfer or conference, or the user may hang up the new call and retrieve the old call from hold.
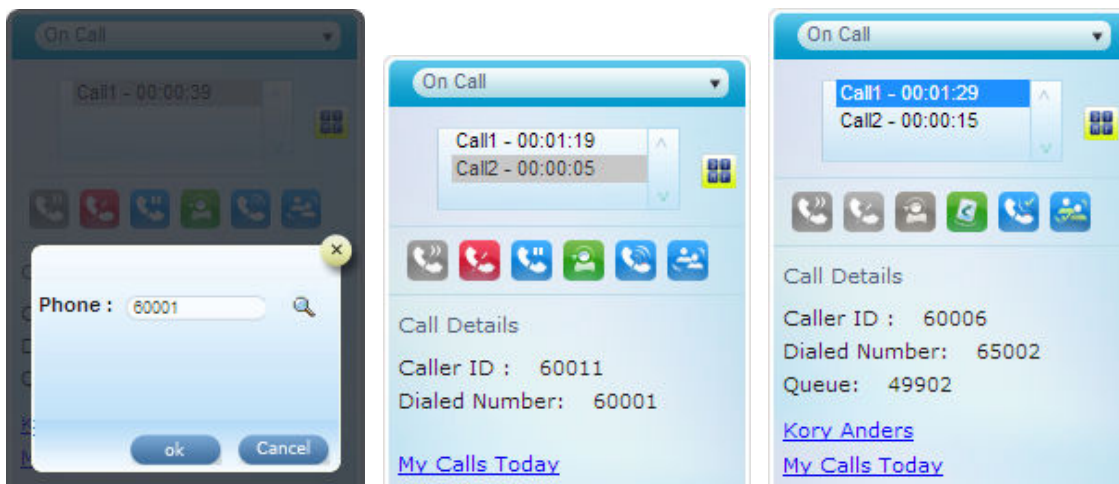

The Transfer and Conference buttons are active on any answered call. Clicking either button will prompt the user for a destination phone number, and whether the operation is to be "blink" or "consultative". If blind, the transfer or conference will be immediately after the new call is placed. If consultative, first line will be left on hold, and the new line will be active. (Doing a consultative transfer or conference is effectively the same as doing a consult, and then completing the transfer or conference.)
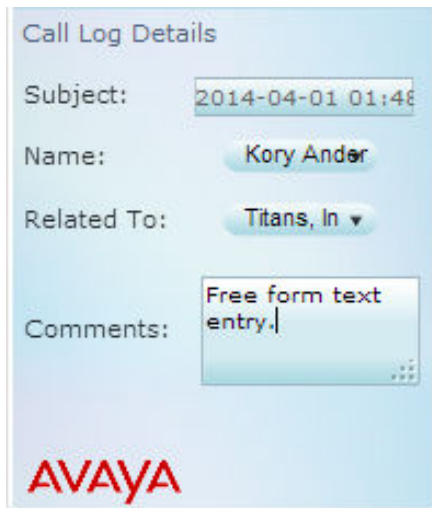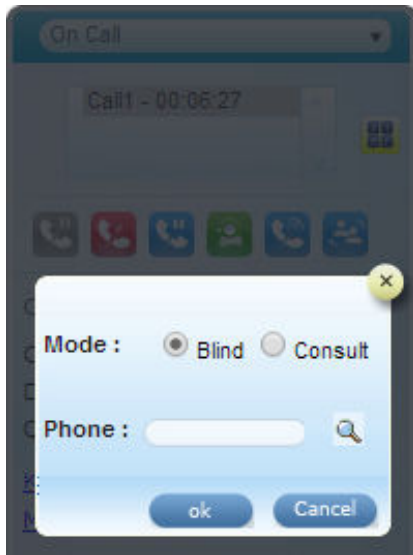
Using the Call Log

This chapter details how to handle the call log for a given call.

The Call Log may be either disabled or hidden. In either case, the user will see nothing about the Call Log and will not know it exists. There will be nothing shown on the Open CTI Adapter softphone. If the Call Log is enabled and visible, then the Call Log will be accessible on the softphone during the call.
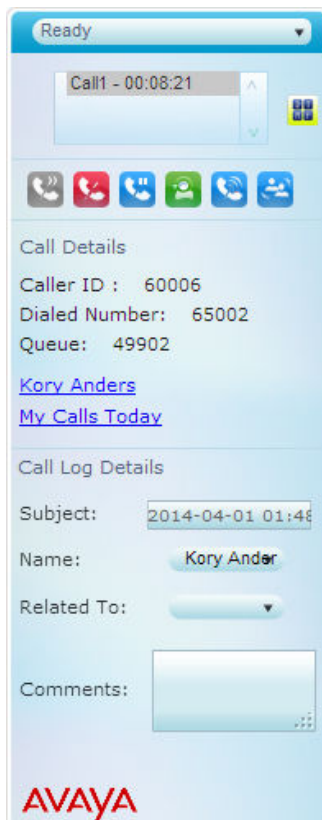
The Call Log will be displayed in the softphone once the call is answered (by the destination number on an outbound call, or by the agent on an inbound call). There are found pieces of information shown about the call log: The date/time stored in the Subject field, the Name of the associated Contact or Lead (if one exists), the Related To name of the associated Object that is not a Contact or Lead, and a region where a free form text comment can be recorded.
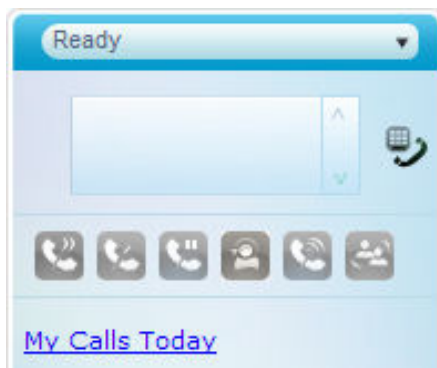

At the end of the call, the Call Log will be written to the Activity table as a pre-completed Activity. You can later access the Call Log using the My Calls Today link, or by looking at the Activity History link of the related object once it is updated.