



User Manual

Customer Interaction Express 3.4

Salesforce Connector

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Overview

Introduction

IPOCC Salesforce App (ISA) integrates Salesforce CRM Application with IPOCC or CIE. In CIE it can be used with PBX Type IP Office as well as Avaya Aura (CM).

Using ISA contact center agents can use Salesforce CRM application as their primary user interface as agent desktop. Using ISA an agent can handle voice calls even if there is no CIE User Interface installed on the agent's desktop.

ISA will be installed and configured on Salesforce, while CRM Connector is installed and configured on CIE Server. The agent will access the Salesforce CRM application via web browser. Some features like screen pop are not supported in Standard Mode. Additionally Standard app has limitations. Hence deploy ISA in console mode only.

Term	Description
CRM	Customer Relationship Management
CIE	Customer Interaction Express
IPOCC	IP Office Contact Center
CTI	Computer-Telephony Integration
ISA	IPOCC Salesforce Application
WSC	Web Services Collection

Prerequisites

- CIE Server (with working Web Service Collection and CRM Connector).
- A Salesforce login account is needed to access Salesforce. All Salesforce activities described in this document can be done only after login to Salesforce. Supported editions are Enterprise Edition, Unlimited Edition, Performance Edition and Developer Edition. "Service cloud" capability needs to be available for agents.
- "Checking Salesforce Service Cloud License" Check Under Administer -> Company Profile -> Company Information. Under section "Feature Licenses", there is "Service Cloud User" field. This shows how many service cloud licenses are available and consumed.

- Whether Agents/Users have been granted that capability can be checked under Administer -> Users. Click on any User. Check the "Service Cloud User" checkbox.

Supported Browsers

Firefox 32+ and Chrome 39+

Supported Features

Following agent functionality (telephony call control) is provided in ISA

- Login, Logout
- Changing Agent State to Available/Not Available.
- Sign-In/Sign-Out to Agent Groups
- Answer Call
- Release(Drop)
- Hold/UnHold
- Make Outbound Call
- Consult
- Transfer
- Conference
- Job Codes
- Wrap-Up

Following Salesforce functionality is provided in ISA

- Call Log
- Screen Pop
- Click-To-Dial

Installing CRM Connector on CIE Server

Overview

The following section describes the three main steps required to deploy the CRM Connector:

- Install WebService Collection and Tomcat_WWW
- Install the CRM Salesforce application onto the CIE Server
- Restart the IP Office Contact Center Watchdog

Installation step by step

1. Stop the watchdog.
2. Make sure that WebService Collection is installed. In case not installed, start SetupWizard and install in Expert Modus the WebService Collection and Tomcat_WWW.
3. CRM Connector is not included in the SetupWizard. On CIE-DVD the setup CRMConnector x64.msi is located in folder CRM. Double click CRMConnector x64.msi, accept End-User License Agreement, choose Setup Type Complete and click on install button. The CRM connector gets installed under C:\Program Files (x86)\Avaya\Customer Interaction Express\Tomcat WWW\webapps\CRMConnector.
4. Check watchdog configuration: Tomcat_WSC and Tomcat_WWW must be included.
5. Restart the watchdog.

Installing ISA

Ensure you are logged in to Salesforce. And you have the requisite package link.
The ISA package link is provided in the Release notes, shipped with CIE
For CIE3.4 the link is:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t10000000kfOd>

1. Once you access the package URL, click on “Continue”
2. Approve Package API Access
3. Click on Next.
4. Click Security Level. Select Grant access to all users. All internal custom profiles get full access or select the option according to your organization’s security policy.
5. Install Package
6. Click on Install. The package will get installed, and you will see below screen

Anwendungsname	Publisher	Versionsname	Versionsnummer
IPOCC_SFConnector	Avaya	IPOCC 10.0.0.0	1.49

Configuring ISA

Below steps are needed in the configuration of ISA

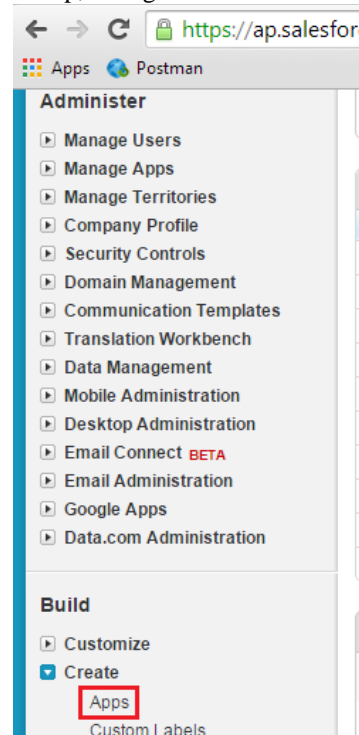
- configure a console app.
- "Call Center" configuration and assigning it to Agents
- Directory Numbers (optional)
- Configure Softphone layouts for screen pop

Custom Console Component

Salesforce Console is geared more towards a contact center agent. It provides a dashboard like interface, and eliminates the multiple tabs. Instead a navigation tab is provided. Switching between navigation tabs doesn't reloads the app, due to which context is preserved. ISA window can be minimized and resized in this case. Clicking on the "Phone" icon, minimizes/restores the app. Step by Step information, on how to enable service console is given in the following link https://help.salesforce.com/apex/HTViewHelpDoc?id=console2_define_app.htm&language=en

Creating Console App

Under Setup, Navigate to Build -> Create -> Apps, as shown below



After clicking on "Apps", you will get below screen. Click on "New"

Search All Setup... ?

Expand All | Collapse All

Salesforce1 Setup New!

Force.com Home

Administer

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates

Apps

An app is a group of tabs that work as a unit to provide functionality. Users can switch between apps using the Force.com app drop-down menu on every page.

You can customize existing apps to match the way you work, or build new apps by grouping standard and custom tabs.

Custom apps work in conjunction with User Profile Tab Visibility settings. [View User Profiles now.](#)

Quick Start **New** Reorder

Action	App Label	Console	Custom	Description
Edit	App Launcher	<input type="checkbox"/>	<input type="checkbox"/>	App Launcher tabs
Edit	Call Center	<input type="checkbox"/>	<input type="checkbox"/>	State-of-the-Art On-Demand Customer Service
Edit	Community	<input type="checkbox"/>	<input type="checkbox"/>	Salesforce CRM Communities
Edit	Content	<input type="checkbox"/>	<input type="checkbox"/>	Salesforce CRM Content

You will need to select “Console”, and click “Next”

Search All Setup... ?

Expand All | Collapse All

Salesforce1 Setup New!

Force.com Home

Administer

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile

New Custom App

Help for this Page ?

Step 1. Select Type Step

Select the type of app to create.

☐ Custom app

☒ Console

Next

Enter an **App Label** and **App Name** for the Console App as per the conventions of your organization

New Console

Help for this Page ?

Step 2. Enter the Details Step 2 of 6

Fill in the fields below to define the console.

Console Information I = Required Information

App Label Example: HRforce, Financeforce, Bugforce

App Name ?


Description

Previous Next Cancel


If you want, you can provide a logo for the app. This is not mandatory. Once done, click on “Next”

Step 3. Choose the Image Source for the Console Logo Step 3 of 6

Optionally, specify a logo for this console. To do so, choose an image file from the document library.

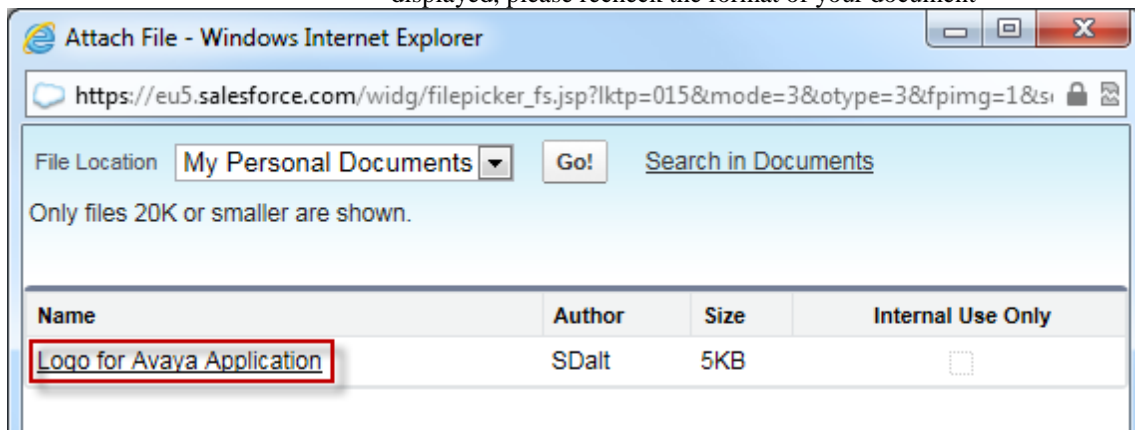
 The file size of a console logo must be smaller than 20 KB. (For comparison, the salesforce.com logo is about 3 KB). To upload an image file, add a new document to the Documents tab. Image dimensions should be a maximum of 275 pixels wide by 35 pixels high for best results. Larger images will be resized and may appear distorted.

Insert an Image



Previous Next Cancel

Select the **uploaded document** for your logo. If the logo document is not displayed, please recheck the format of your document



The logo is displayed. Click the **Next** button.

New Console Help for this Page ?

Step 3. Choose the Image Source for the Console Logo Step 3 of 6

Optionally, specify a logo for this console. To do so, choose an image file from the document library.

 The file size of a console logo must be smaller than 20 KB. (For comparison, the salesforce.com logo is about 3 KB). To upload an image file, add a new document to the Documents tab. Image dimensions should be a maximum of 275 pixels wide by 35 pixels high for best results. Larger images will be resized and may appear distorted.

Insert an Image | Reset to Default



Previous Next Cancel

Click the **Navigation Tab** items to be displayed in console mode. Then select the **Next** button.

Step 4. Choose Navigation Tab Items

Step 4 of 6

Select the objects to include in this console's navigation tab. The navigation tab:

- Lets users go to objects' home pages from one tab
- Saves screen space by combining standard tabs into a small component

Choosing items for the navigation tab is like choosing which tabs display for standard Salesforce.com apps.

Accounts

Accounts

Contacts

Cases

Opportunities

+

Edit | Delete | Create New View

Billi

NY

Items marked with an asterisk (*) haven't been fully adapted for the console. See the [Salesforce Console Limitations](#) for more information.

Available Items

Price Books

Contracts*

Dashboards*

Documents*

Orders*

Products

Reports*

Solutions

Libraries*

Content*

Subscriptions*

Profile*

People*

Groups*

Add

Remove

Selected Items

Cases

Home

Accounts

Contacts

Leads

Opportunities

Campaigns

Ideas

Top

Up

Down

Bottom

Previous

Next

Cancel

Chat

Choose how records are displayed.

Step 5. Choose How Records Display

Step 5 of 6

The Console displays all records as tabs so that users can quickly find, update, and create records on one screen.

- Primary tabs display the main record to work on, like an account
- Subtabs display related records, like cases or contacts on an account

All items selected on a primary tab display as subtabs. This lets you work with related items in the context of their records.

On this page, choose how records display when they're selected from *outside* of primary tabs or subtabs. For example, when users select cases from list views, search results, or screen pops, you can select cases to display as primary tabs or as subtabs on parent records, such as accounts.

Additional Resources

Watch a Demo (2 minutes)

Choose how the following display:

Case	records open	<input checked="" type="radio"/> As a primary tab <input type="radio"/> As a subtab of: <div></div>
Home	tab opens	<input checked="" type="radio"/> As a primary tab <input type="radio"/> As a subtab of: <div></div>
Account	records open	<input checked="" type="radio"/> As a primary tab <input type="radio"/> As a subtab of: <div></div>
Contact	records open	<input checked="" type="radio"/> As a primary tab <input type="radio"/> As a subtab of: <div></div>
Lead	records open	<input checked="" type="radio"/> As a primary tab <input type="radio"/> As a subtab of: <div></div>
Opportunity	records open	<input checked="" type="radio"/> As a primary tab <input type="radio"/> As a subtab of: <div></div>
Campaign	records open	<input checked="" type="radio"/> As a primary tab <input type="radio"/> As a subtab of: <div></div>
Idea	records open	<input checked="" type="radio"/> As a primary tab <input type="radio"/> As a subtab of: <div></div>

Next section to profile 12

Step 6. Assign to Profiles Step 6 of 6

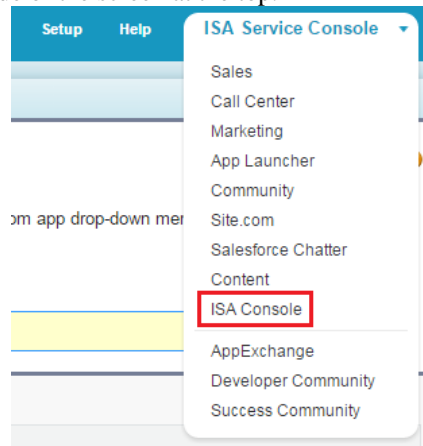
Choose which user profiles can access this console. Users access console apps from the Force.com app menu. You can select this console as the default app for a profile. This means that users with the profile see this console when they log in for the first time.

1 If an app is set as the default for a profile, you can't make it invisible for that profile. Both the Visible and Default checkboxes will be read-only.

Profile	Visible	Default
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Click on “Save”. The App will get saved.

The app can be selected by clicking on the Salesforce menu in the right hand side of the screen at the top.



Once the console app (ISA Console in this case) is selected, your screen layout will change. The layout might change, if additional configurations are done. Observe the area at the bottom of right hand side.

State	Phone Number	Customer - Channel	Sanlap
TX	(512) 757-6000	Customer - Direct	sanlap
OR	(503) 421-7800	Customer - Channel	sanlap
CA	(650) 867-3450	Customer - Channel	sanlap
IL	(312) 596-1000	Customer - Direct	sanlap
	(014) 427-4427	Customer - Channel	sanlap
CA	(415) 901-7000		sanlap
NY	(212) 842-5500	Customer - Direct	sanlap
Singapore	(650) 450-8810	Customer - Direct	sanlap
UK	+44 191 4956203	Customer - Direct	sanlap
AZ	(520) 773-9050	Customer - Direct	sanlap

1-17 of 17 0 Selected << Previous Next >> Page 1 of 1

Phone

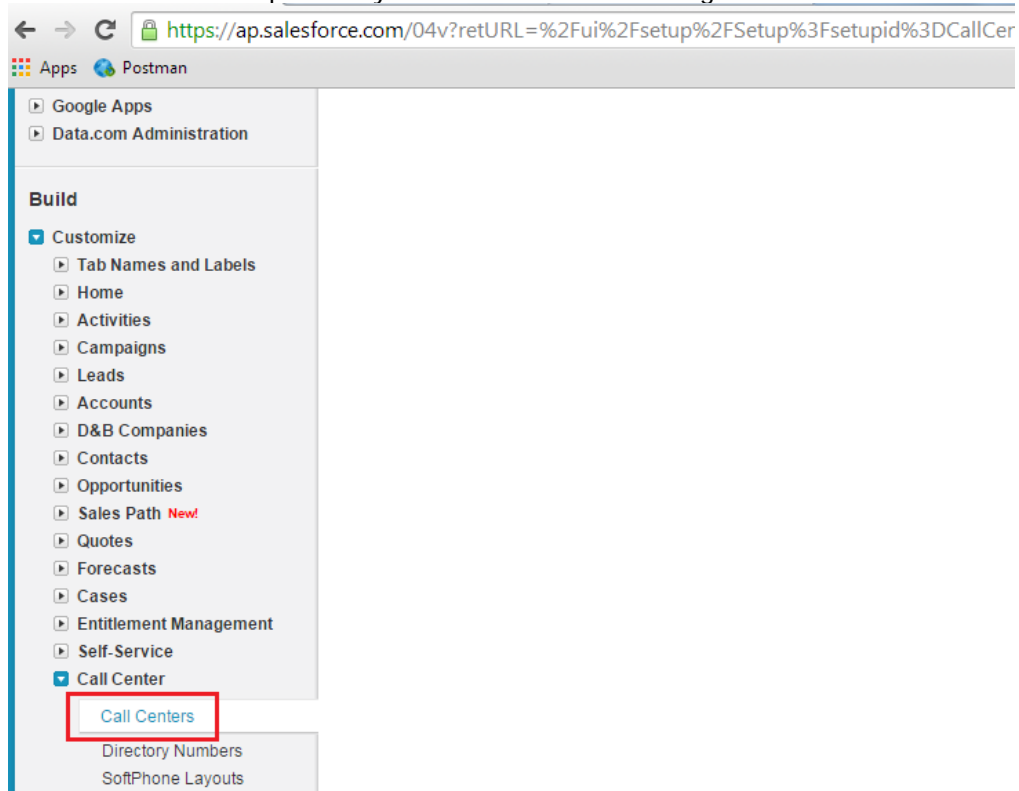
Click on “Phone”, the softphone will pop. If contact center is configured, the login screen will be seen as shown below

Configuring Contact Centre

Once ISA is installed, you will need to provide IP address and port of CIE Server.

Click on Salesforce, under setup -> Build -> Call Center -> Call Centers

You might get a getting Started.. screen. If you get it, you may need to click on "Continue" to get to the actual section unless you have previously selected don't show this again.



The installed Call Center Application will be displayed. Click on Edit

All Call Centers

A call center corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce.com users must be center before they can use any Call Center features.

Import				
Action	Name ↑	Version	Created Date	Last Modified Date
Edit Del	IPOCC Call Center Adapter		2/5/2015 6:52 PM	3/5/2015 7:50 PM

In the first field **Salesforce Application Name** enter CIE.

In field Display Name you can adjust the name optional.

In the lower part "Server configuration" you have to enter the IP Address to that of your CIE Server. Edit the port number, as provided in CRM Connector. Default value is 28443. Refer below screen for fields.

Callcenter – Bearbeiten		Speichern	Abbrechen
Salesforce Application Name			
Salesforce Application Name, Enter either CIE or IPOCC	<input type="text" value="CIE"/>		
General Information			
Internal Name	<input type="text" value="isaCallCenterDefinition"/>		
Display Name	<input type="text" value="Call Center Adapter"/>		
CTI Adapter URL	<input type="text" value="/apex/avaya_ipocc_sfc_icc/"/>		
Use CTI API	<input type="text" value="true"/>		
Softphone Height	<input type="text" value="450"/>		
Softphone Width	<input type="text" value="400"/>		
Server Configuration			
IPOCC Server Address	<input type="text" value="135.124.109.215"/>		
IPOCC Server Port	<input type="text" value="28443"/>		
Refresh Timeout (seconds)	<input type="text" value="60"/>		
On Call Keepalive (seconds)	<input type="text" value="30"/>		
Use Directory for Contact Details ?	<input type="text" value="true"/>		
Access code for external OutCC	<input type="text" value="0"/>		
Digits to Trim for external Incoming	<input type="text" value="1"/>		

Refresh Timeout (seconds) is the time in seconds, which defines for how long during a page refresh, the connection with the server will be maintained. If the page refresh takes longer than this timeout, Agent will be logged out. By Default it will have a value of 60 seconds.

On Call Keepalive (seconds) is the interval time in seconds after which, ISA will send a periodic keepalive message to CIE Server. This is intended to keep the Agent session alive. By Default it will have a value of 30 seconds.

Be very careful while changing these default timeout values. Change these values only if you understand the implications.

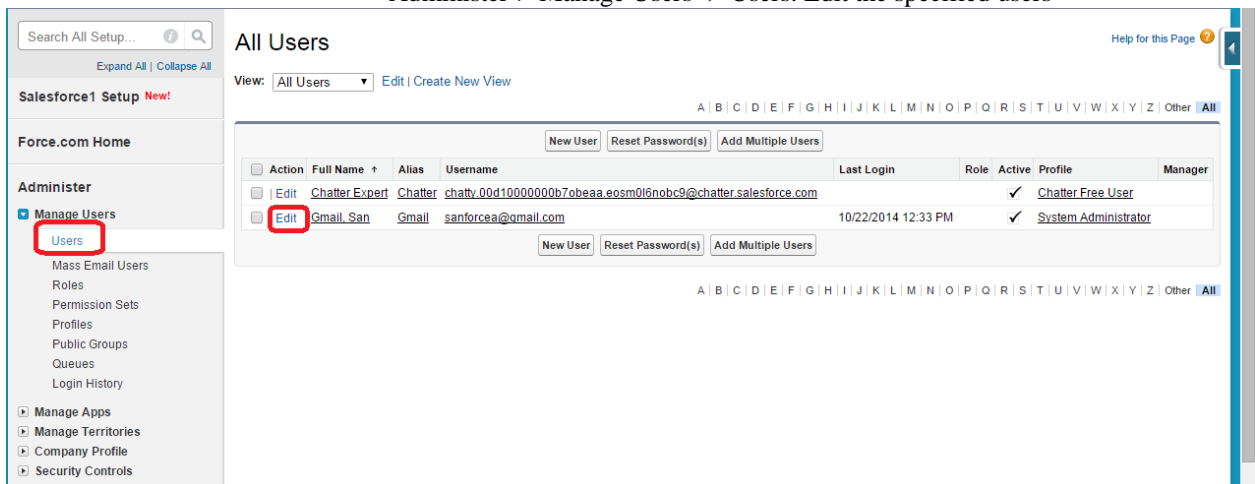
Use Directory for Contact Details If enabled, for internal calls, ISA will display contact info, by searching the SF Directory. Directory Numbers need to be populated for this to work.

Access code for external OutCC this code will be used for outbound dialing.

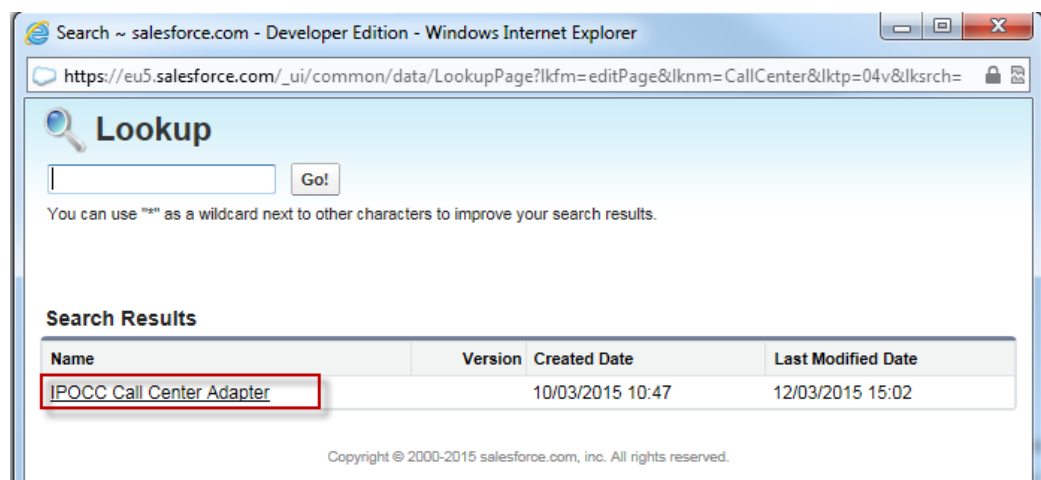
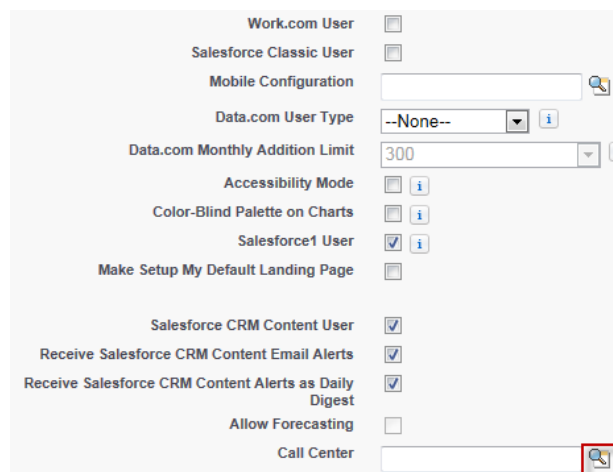
Digits to Trim for external incoming: This number is used to trim digits from incoming external call. The trimmed number will be used for lookup in salesforce database. For e.g. If this number is configured to be 1, and an external incoming number is 9123456. ISA will do a lookup for "123456". i.e it will trim the 1 digit from the beginning of the incoming number. If this number is configured to be 2, and an external incoming number is say 77123456. ISA will do a lookup for "123456" i.e. it will trim 2 digits from the beginning of the incoming number. Note: this function is only available for new installation. In

case of upgrade from ISA version <1.46, this field is not visible. You have to uninstall and install the actual ISA version.

The application needs to be made available to the agents that you want. Under Administer-> Manage Users -> Users. Edit the specified users



To make the application available to that user. In the user configuration interface, edit the **Call Center** field, and select the **Call Center look up** button.



The Adaptor is now added, click the **Save** button.

Configuring Softphone Layout

The Softphone Layout determines how screen pop functionality works. You can configure what SF objects you want, what should be searched. Refer https://help.salesforce.com/htviewhelpdoc?id=cti_admin_phonelayoutscr eate.htm&siteLang=en_US Navigate to **Setup -> Build -> Call Center -> Softphone Layouts**. By default, there will be no layout configured. Click on New. You will see the below fields.

Check the “Is Default Layout” checkbox.

The Call Type is “Inbound”

You will need to edit these sections. The layout is of three sections. The first section, “Display these call-related fields”, controls what items will be displayed for a call, when the information is available. The next section contains what Salesforce database objects will be displayed on a successful screen pop, what fields in those objects will be displayed. The third section is to configure the screen pop settings.

The basic call detail fields that are to always be displayed for a call are configured in the first section, “Display these call-related fields”. Click the options to be displayed for a call from **Caller ID, Dialed Number**

Display these call-related fields:

▼ Caller ID, Dialed Number

Available		Selections
Queue Segment	Add <input type="button" value="▶"/> <input type="button" value="◀"/> Remove	Caller ID Dialed Number Up <input type="button" value="▲"/> <input type="button" value="▼"/> Down

Select which Salesforce database objects will be displayed on a successful screen pop, along with the fields contained within the object to be displayed. Go to Add/Remove objects to display Salesforce data objects

Display these salesforce.com objects:

▼ Account, Contact, Lead

Available		Selections
Campaign Case Event Opportunity Task User	Add <input type="button" value="▶"/> <input type="button" value="◀"/> Remove	Account Contact Lead Up <input type="button" value="▲"/> <input type="button" value="▼"/> Down

An Account look up only displays one account. If multiple matches are found only the Account name is displayed. Account look up search parameters can be added from the **Available** field to the **Selections** field.

▼ If single Account found, display: Account Name

Available		Selections
Type Billing Street Billing City Billing State/Province Billing Zip/Postal Code Billing Country Billing Latitude Billing Longitude Shipping Street Shipping City Shipping State/Province Shipping Zip/Postal Code Shipping Country Shipping Latitude	Add <input type="button" value="▶"/> <input type="button" value="◀"/> Remove	Account Name Up <input type="button" value="▲"/> <input type="button" value="▼"/> Down

If multiple matches found, only Account Name is displayed.

A Contact look up only displays one contact. If multiple matches are found only the contact Name is displayed. Contact look up search parameters can be added from the **Available** field to the **Selections** field.

▼ If single Contact found, display: Name

Available		Selections
Salutation	Add Remove	Name
First Name		
Last Name		
Other Street		
Other City		
Other State/Province		
Other Zip/Postal Code		
Other Country		
Other Latitude		
Other Longitude		
Mailing Street		
Mailing City		
Mailing State/Province		
Mailing Zip/Postal Code		

Up
Down

If multiple matches found, only Name is displayed.

In this case, if a contact object is found, the Name will be displayed.

Screen Pop Settings

The Screen Pop Settings allow more definition in how screen pops are shown.

CTI 2.0 or Higher Settings [Help about this section](#)

Screen Pop Settings:

▼ Screen pops open within: New browser window or tab [Collapse](#)

☐ Existing browser window
☒ New browser window or tab

▼ No matching records: Pop to new Contact [Collapse](#)

☐ Don't pop any screen
☒ Pop to new
☐ Pop to Visualforce page

▼ Single-matching record: Pop detail page [Collapse](#)

☐ Don't pop any screen
☒ Pop detail page
☐ Pop to Visualforce page

▼ Multiple-matching records: Pop to search page [Collapse](#)

☐ Don't pop any screen
☒ Pop to search page
☐ Pop to Visualforce page

The first option determines where the screen pop will occur. It can pop within the existing browser window, or it can pop into a new browser tab. (If the browser being used does not support tabs, it can pop into a new browser window instead.)

The second option determines what will be done if no matches are found. The choices are to have no pop at all, to pop to a new Salesforce object (e.g. a new Contact)

The third option determines what to do with a unique match. The choices are to not pop at all, pop into the detail page.

The last option determines what to do when multiple matches have been found. The choices are to not pop at all, pop to a search page.

Please do not use the pop to a VisualForce page, unless you know, what you are doing, and are very familiar with VisualForce pages.

Click on “Save” once you are done.

With the configuration changes done, ISA is now available to those agents.

Using ISA

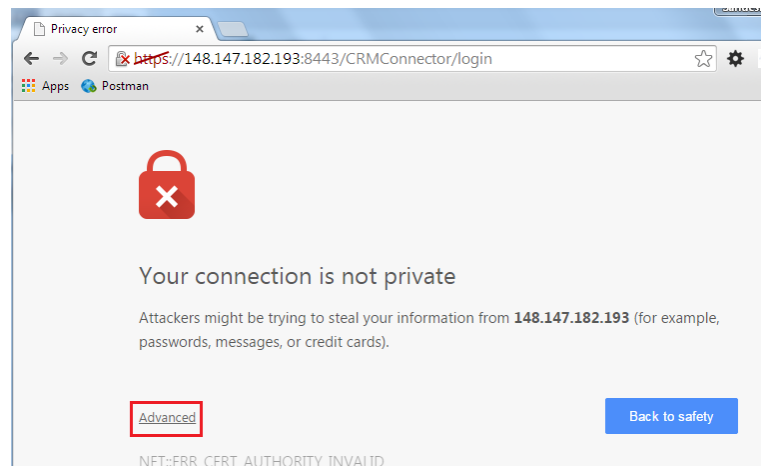
Accepting the CRM Connector Certificate prior to Logging into ISA

Before agent can login to IPOCC Salesforce App (ISA), the certificate of the CIE Server needs to be accepted.

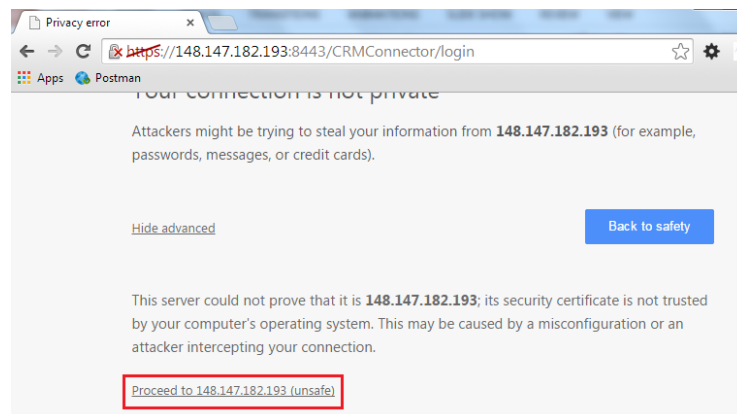
In your browser, enter the URL at **Fehler! Hyperlink-Referenz ungültig.**

Ensure the port number is same as given in CRMConnector Installation section.

For e.g., in case of Chrome, if you access the URL, you will get the below screen.



Click on “Advanced”. You will get below screen



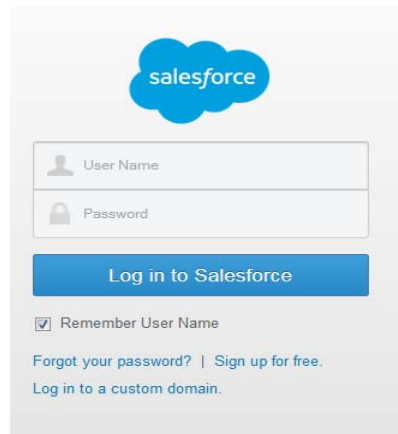
Click on “Proceed to”. The certificate will be accepted.

Note: If the internet connection is via a proxy. An exception needs to be added in the browser for IP Office Contact Center Server. Unexpected Connection failures can occur over a proxy connection.

Login

Login to Salesforce using the Salesforce URL.

Agent needs to login to Salesforce



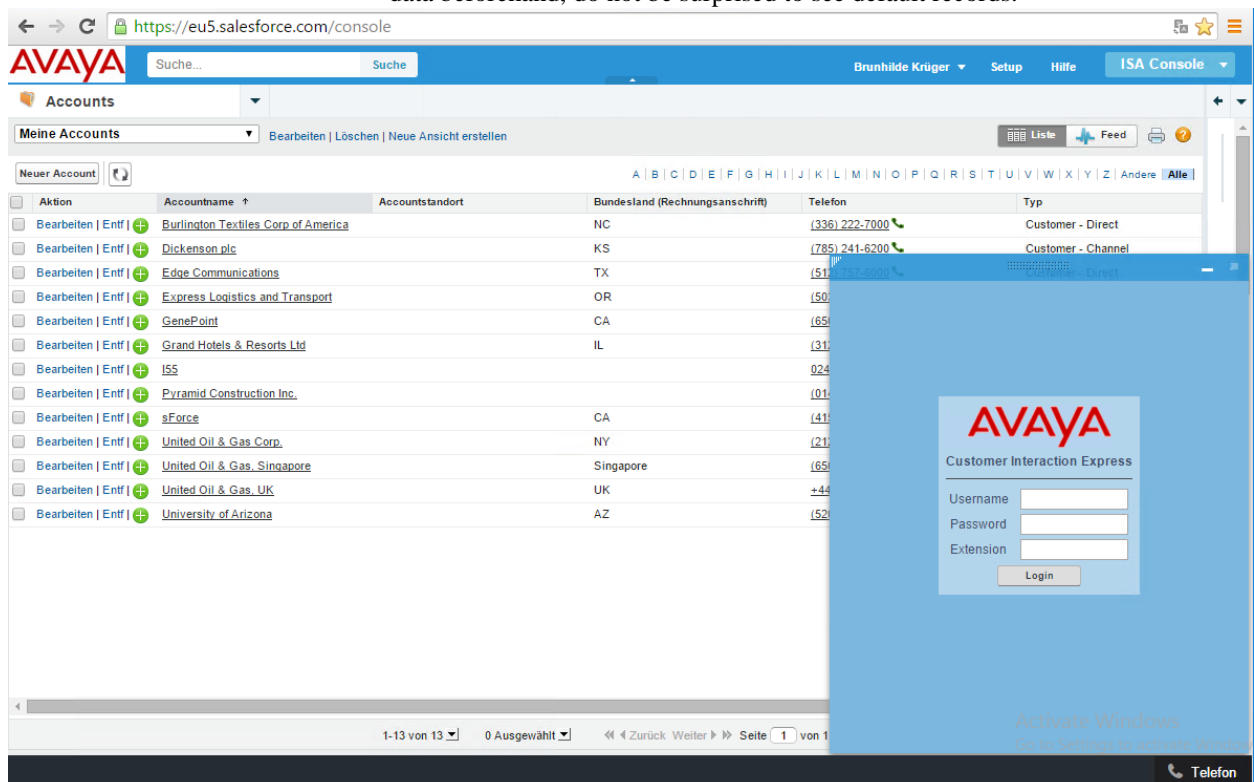
The image shows the Salesforce login page. At the top is the Salesforce logo. Below it are two input fields: 'User Name' and 'Password'. A blue button labeled 'Log in to Salesforce' is positioned below the password field. Underneath the button is a checkbox labeled 'Remember User Name'. At the bottom, there are two links: 'Forgot your password?' and 'Sign up for free.', followed by a link 'Log in to a custom domain.'

Login to ISA

Once the agent has logged into Salesforce, the IP Office Contact Center Salesforce App (ISA) will be loaded in the bottom right side of browser, as illustrated below.

The agent must click on the **Phone** button to pop ISA.

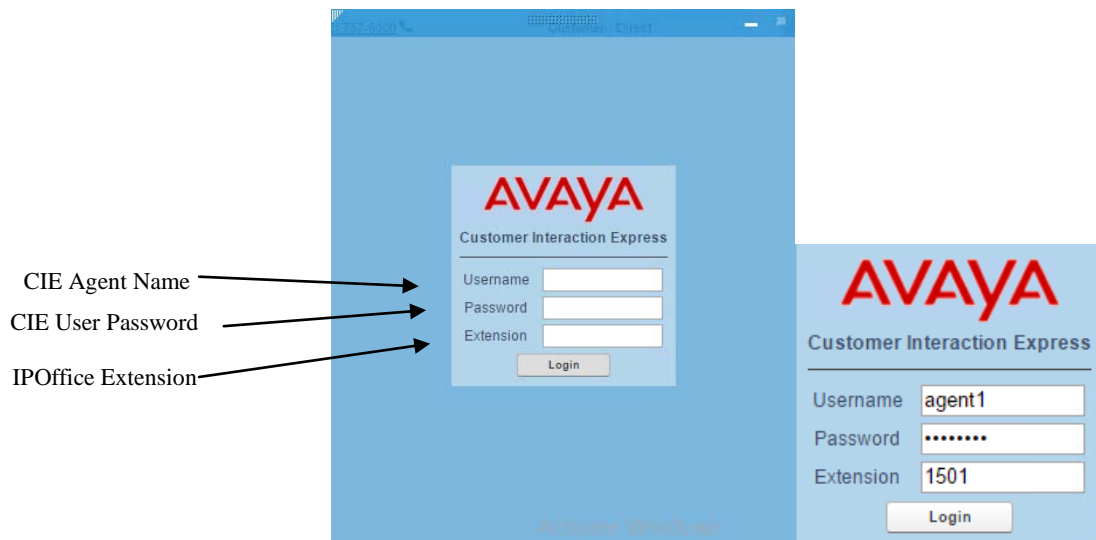
Note: Salesforce provides some default dummy data. So if you don't have any data beforehand, do not be surprised to see default records.



The screenshot shows the Salesforce console interface. The top navigation bar includes the AVAYA logo, a search bar, and user information for Brunhilde Krüger. The main content area displays a list of accounts under the 'Accounts' tab. The list has columns for 'Aktion', 'Accountname', 'Accountsstandort', 'Bundesland (Rechnungsanschrift)', 'Telefon', and 'Typ'. A modal window for 'AVAYA Customer Interaction Express' is overlaid on the bottom right, containing fields for 'Username', 'Password', and 'Extension', along with a 'Login' button. The bottom status bar shows '1-13 von 13', '0 Ausgewählt', and navigation controls.

Aktion	Accountname	Accountsstandort	Bundesland (Rechnungsanschrift)	Telefon	Typ
Bearbeiten Entf	Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct
Bearbeiten Entf	Dickenson plc		KS	(785) 241-6200	Customer - Channel
Bearbeiten Entf	Edge Communications		TX	(512) 757-8500	
Bearbeiten Entf	Express Logistics and Transport		OR	(503) 251-1000	
Bearbeiten Entf	GenePoint		CA	(650) 251-1000	
Bearbeiten Entf	Grand Hotels & Resorts Ltd		IL	(312) 251-1000	
Bearbeiten Entf	I55			024	
Bearbeiten Entf	Pyramid Construction Inc.			(01) 251-1000	
Bearbeiten Entf	sForce		CA	(415) 251-1000	
Bearbeiten Entf	United Oil & Gas Corp.		NY	(212) 251-1000	
Bearbeiten Entf	United Oil & Gas Singapore		Singapore	(65) 251-1000	
Bearbeiten Entf	United Oil & Gas UK		UK	+44 251-1000	
Bearbeiten Entf	University of Arizona		AZ	(520) 251-1000	

Initially ISA login screen will be displayed. Agent needs to enter his username, password and extension.

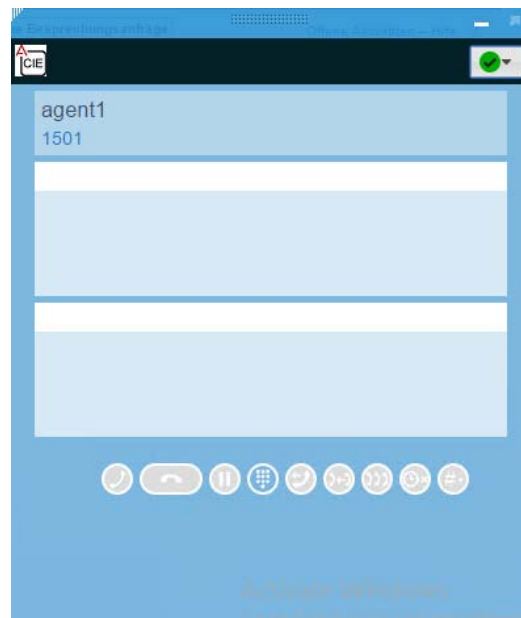


The agent then enters his credentials, as shown (The actual values will differ)

If the credentials are valid, the login is successful, and the agent will get the display of Telephony controls as shown below.

Note: Unsupported UI controls will not be displayed

Note: Click-to-dial is enabled on Salesforce.com once an Agent successfully logs into the Application. Click-2-dial will be disabled on Agent log off.



Note: If an agent provides invalid credentials, an error message will be displayed stating Invalid agent credentials. To login into the CRM App User Interface, the user has to either click on the Login button or tab to the Login button and press the Enter key or Space Bar to activate the login process. Pressing the Enter key on any of the fields (Username, Password, Extension) is not supported, as each field requires validation.

Note: If a user is logged into ISA and the network connection with CIE server is broken and the user then performs an operation in the User Interface (for example, dials a number), the user is automatically logged out of the User Interface. After a period of time and the following message is displayed *Connection to Call Center Server was closed or lost unexpectedly*.

Users will not be allowed to logout or change agent state from "Available" to "Breaktime", when a call is in progress.

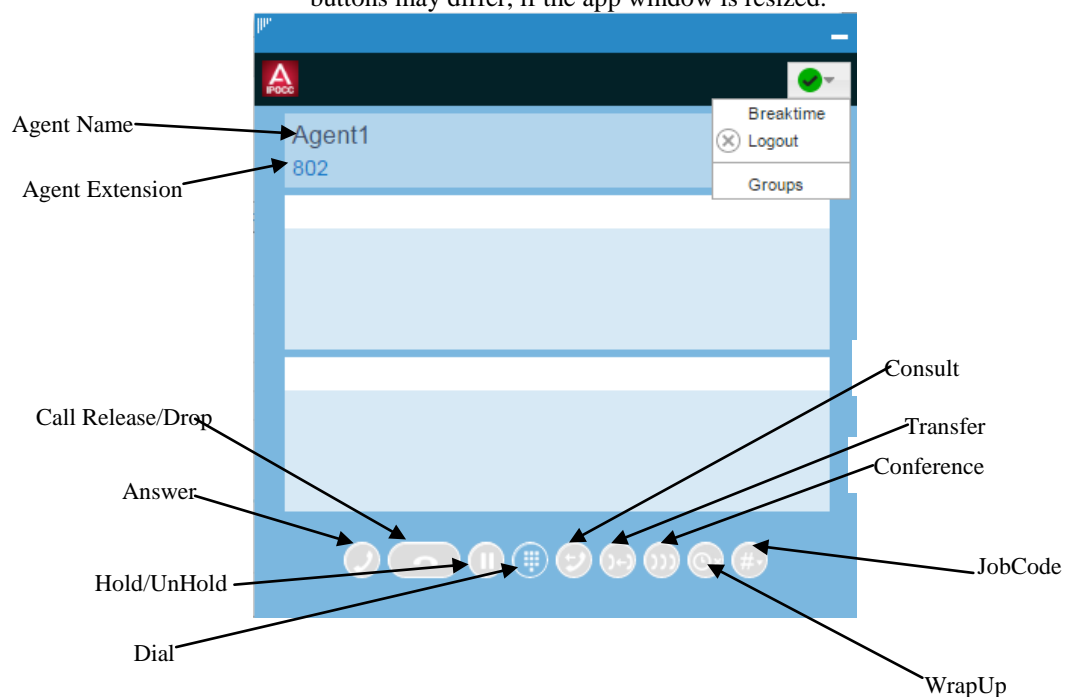
If user is logged into ISA and is logged off from the Telephony via Supervisor console or Agent console of the IP Office Contact Center thick User Interface, the user is automatically logged off from ISA. The following message is displayed Agent was logged off via Supervisor console or via external endpoint.

Vice-versa of above point is also true, i.e. if a user is logged off from the ISA App User Interface, then user is also logged off from the Telephony in the CC UI.

ISA UI Controls

Overview

The telephony UI buttons of ISA are shown below. The alignment of these buttons may differ, if the app window is resized.

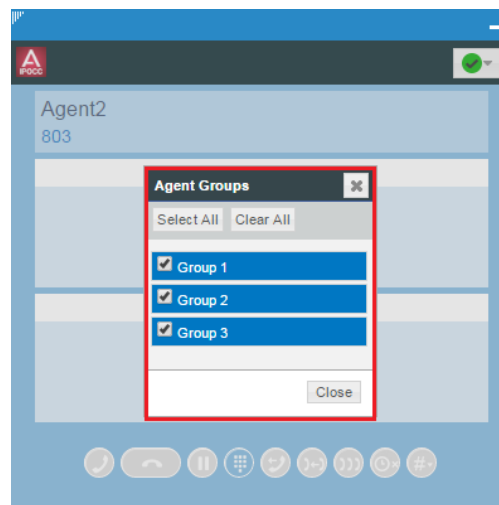


Note: The Agent State is visible on the top right, as a select option widget. The green icon indicates that the agent is available. The red icon indicates that the agent is on breaktime. The state of the agent can also be updated by the Supervisor or the Agent them from CIE User Interface. The changes are reflected in ISA.

Operation

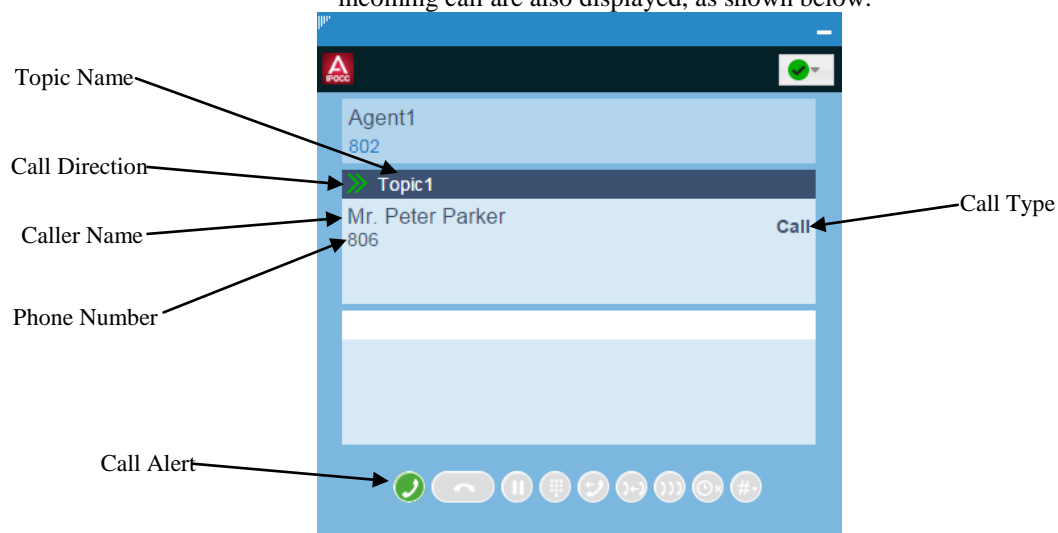
Agent Group Sign-On/Off

Click on Groups, a window will pop-up, showing the list of groups as shown below. Agent can check, or uncheck the groups to sign-in/off.



Receiving Calls

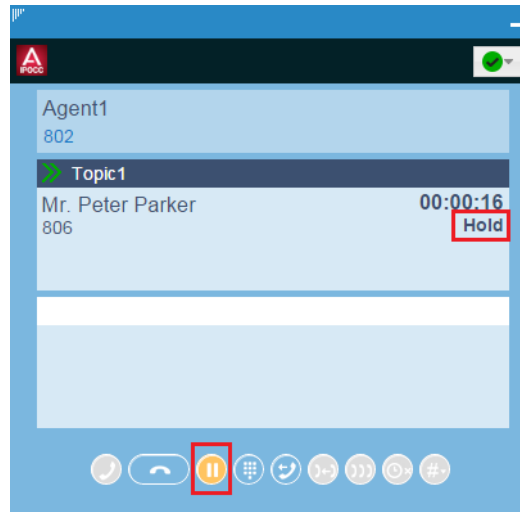
After successful login, Agent can receive incoming calls. When an incoming call arrives, the “Call Pickup” button becomes green, and blinks. Details about the incoming call are also displayed, as shown below.



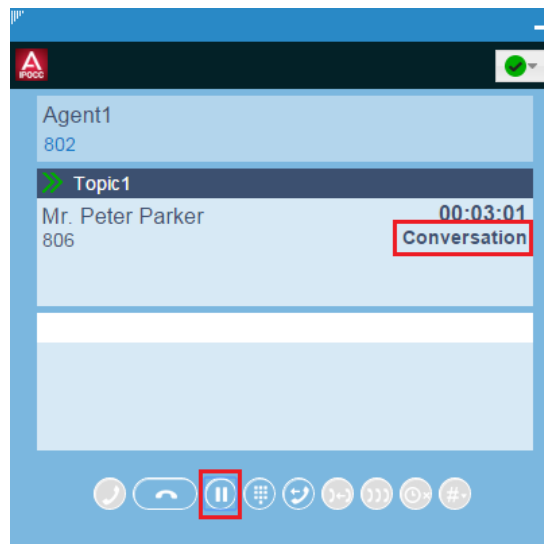
Agent accepts the call, by clicking on the “Call Pickup” button. Once the call is answered, the conversation starts, and the screen changes as below. The duration of the call, direction of the call is shown along with incoming contact details. The incoming Contact must be pre-configured in Salesforce, else the contact will be shown as **Unknown**.

Hold/UnHold

Call can be put on hold, by the agent, or the other party. Agent can put the call on hold, by clicking on the “Hold” Button. Once the call goes on hold, the “Hold” button is illuminated.. The call status will also be modified to reflect the status.

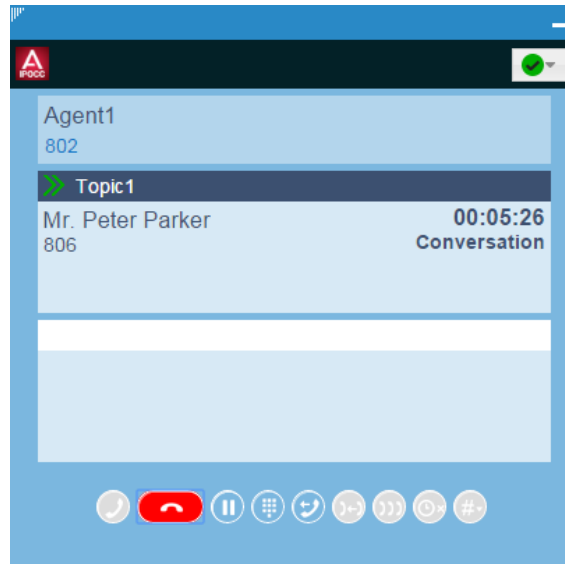


The call can be taken off hold by once again clicking on the **Hold**. The status of the call will change accordingly.



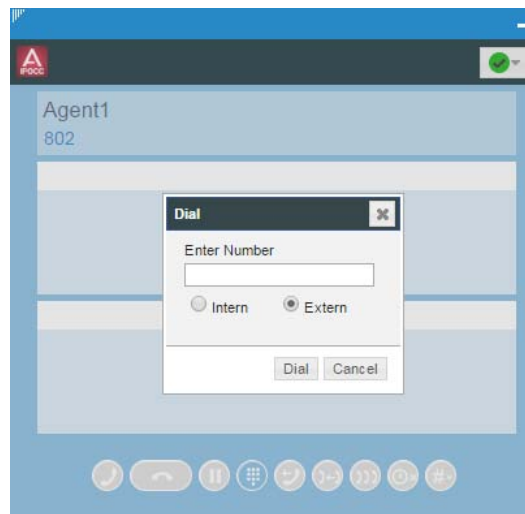
Drop Call

To drop/release a call, click on the “Call Release” button. The button’s color will change to Red, when it is clicked.



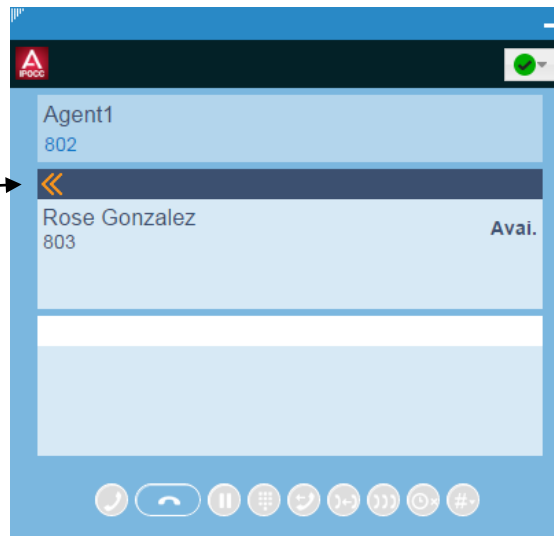
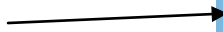
Outbound Call

To make an outbound call, click on the “Dial Pad” button. A dialog pops up. Select whether an internal or external number is to be dialed. In the Dial dialog, enter the number to be dialed, and then click on “Dial”.

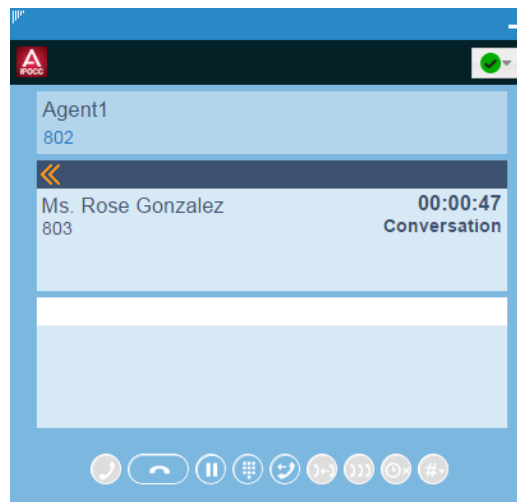


Once the “Dial” button is hit, the dialog disappears, and the status of the call, and the other party is shown.

Call Direction

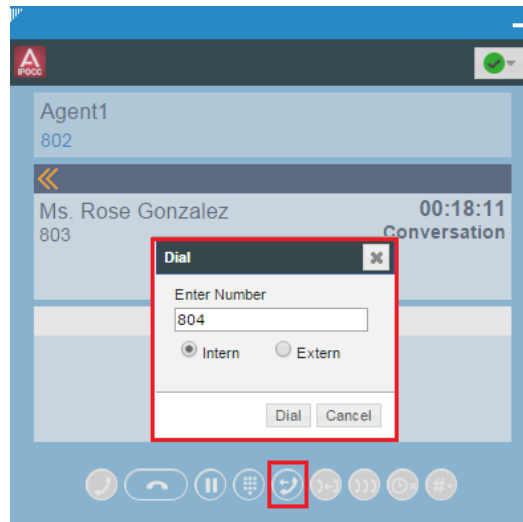


Once the other party accepts the call, the call is connected, and the status is updated to Conversation, as shown below

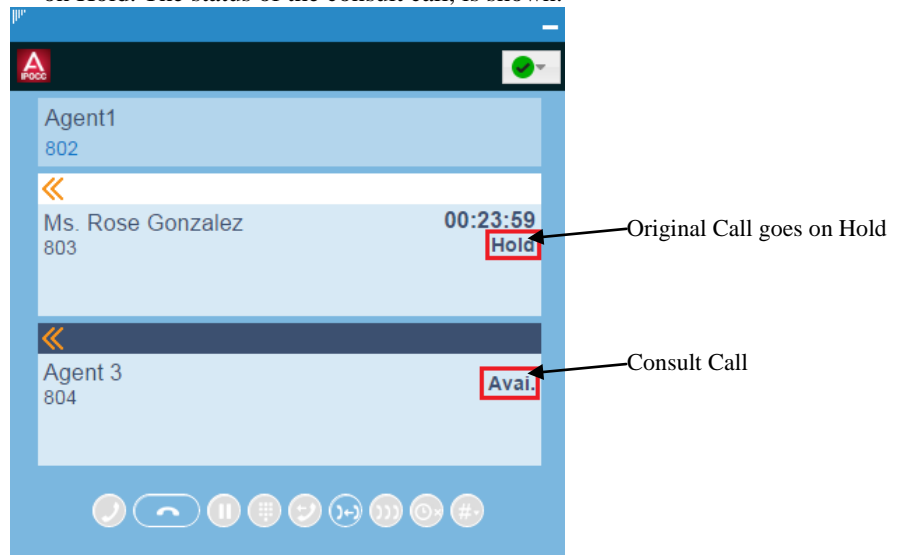


Consult

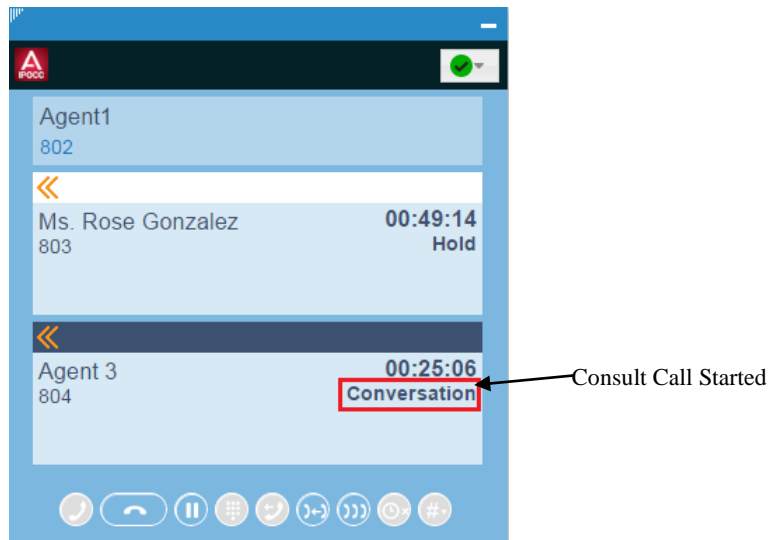
In case of an ongoing call, if the agent wants to dial a consult call. The agent needs to click on “Consult” button. On clicking the consult button, a dialog box opens up.



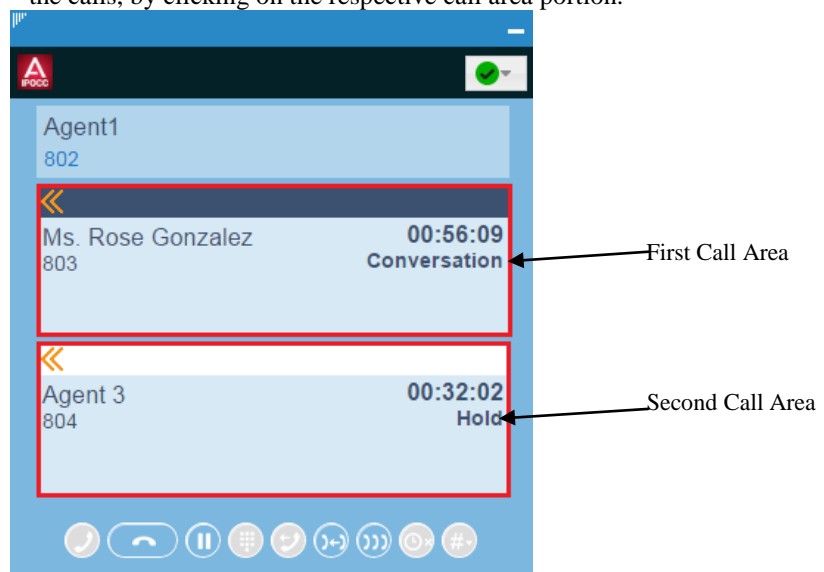
The agent enters the number for consult, and clicks “Dial”. The current call goes on Hold. The status of the consult call, is shown.



Once the other agent accepts the call, the conversation starts, as shown below



During the consult call (or between any two calls), the agent can switch between the calls, by clicking on the respective call area portion.



After the 'consult' call is completed, the agent clicks on the **Call Release** button. The 'consult' call is ended.

Note: Ensure that the consult call is the active call.

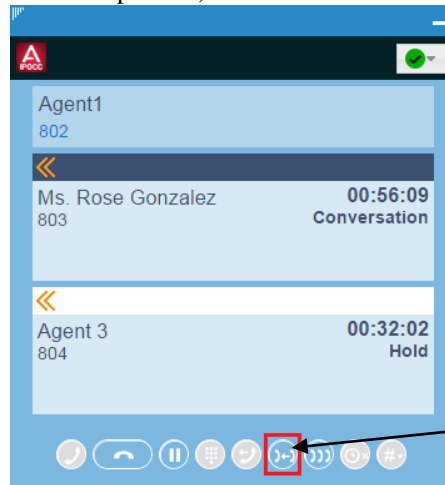
When the 'consult call' ends, the original call is still in a Hold state. Therefore to "unhold" the call the agent must once again click the Hold button.

To end the call, click the **Call Release** button.

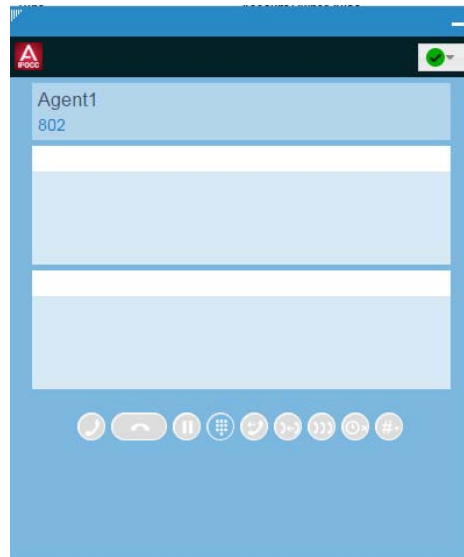
Transfer

To Transfer an existing call, the agent clicks the **Dial Pad** button, enters the number to which the call is to be transferred. The original call is automatically placed on hold.

Once the other party has picked up the call, the call is connected. To complete the transfer process, click the **Transfer** button.



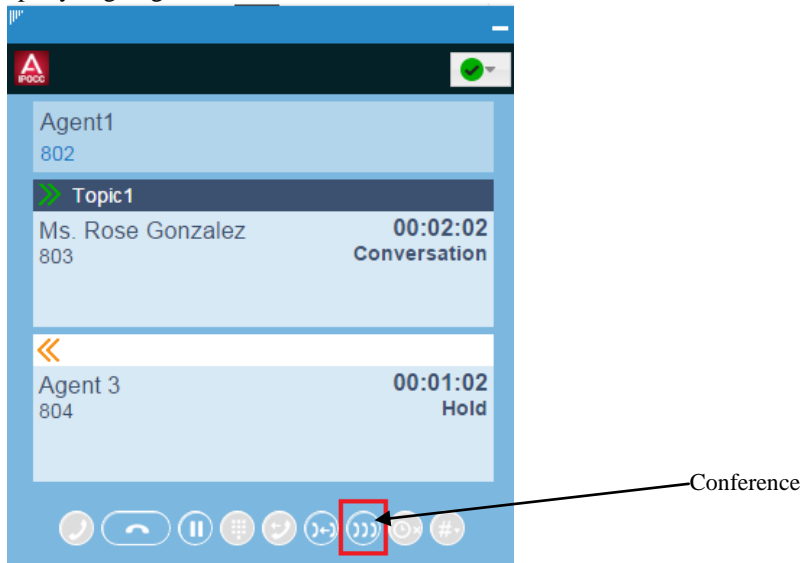
Once the transfer button is clicked, the call is transferred from the agent.



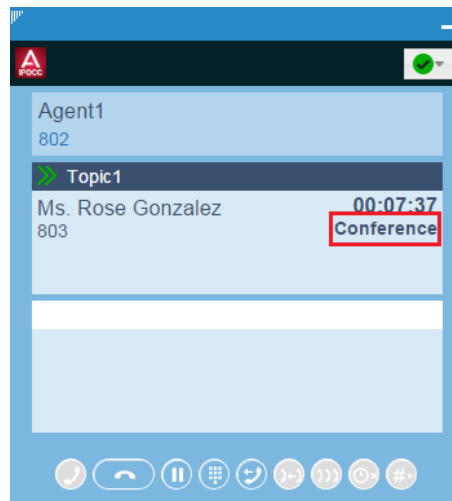
Conference

In an ongoing call, if the agent wants to Conference in someone else. The agent needs to click on the “Dial Pad” and dial the party, whom the agent wants to conference-in. The original call goes on Hold.

Then the other party accepts the call, and the call between agent and the other party is going on.



To join these two calls in a conference, the agent clicks on “Conference” button. Once the conference is started, the two calls are merged into the conference.

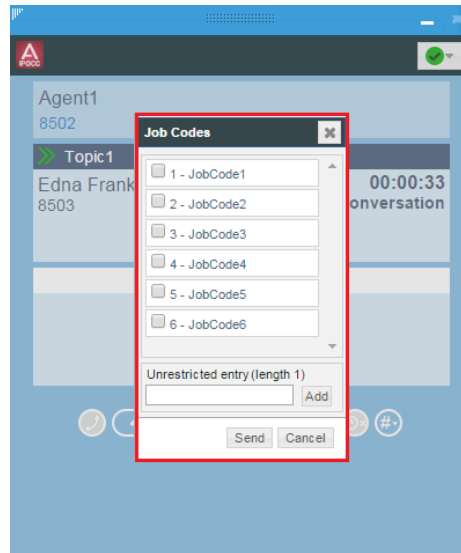


If the agent wants to add another party into the conference. The agents needs to follow the same process. i.e. dial the number, connect the call, and then click on conference button.

To drop out of the conference, the agent needs to click on “Call Release”.

Job Codes

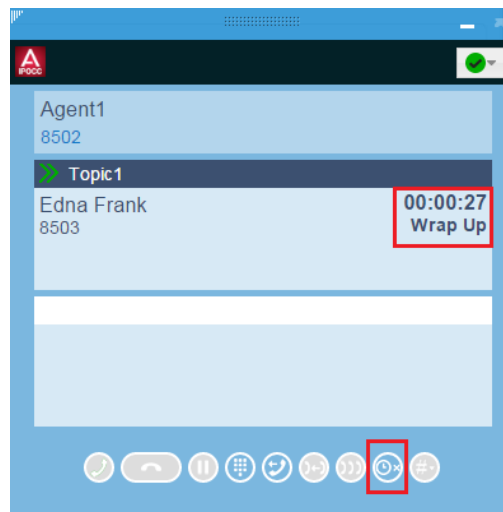
Agent can send Job Codes, by clicking on the Job Code button. After clicking on the button, the agent will see a pop-up as shown below.



The agent selects the Job Code, or can enter in the entry box below.

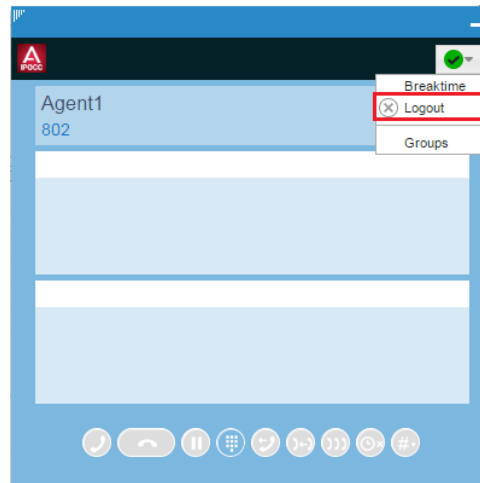
Wrap-Up

If wrap up is configured. Agent enters the wrap-up stage, after call ends. By clicking on the wrap-up button, agent can end the Wrapup. When the agent is in wrap-up, the timer shows the time left for wrap-up, as shown below.



Logout

To logout agent needs to click on “Logout” button.



Service

Call Log

By default, completed calls are logged and saved in Salesforce, when the corresponding contact object is available. If the incoming contact number is present in multiple objects of same or different type, the call log will not be saved. Calls logs for incomplete/abandoned calls will not be saved. Call logs are saved to Salesforce “Task” object of the Contact.

The following fields are saved by ISA in Call logs.

- Contact id
- Subject (default value "CALL" will be stored)
- Status- will always be stored as “completed” state
- Phone and email id will automatically updated from contact
- Duration (in seconds)
- Call Type

Call Log will always be displayed in the activity history of the contact.

Note: Call Logs are not a replacement for IP Office Contact Center call related reports. The two are independent of each other. Salesforce Call logs, saves or updates the Task object in Salesforce. Salesforce will only have information related to the current User/Agent.

Topic Call: An inbound topic call initiated from customer will be saved in call log. The topic call will be visible in comments field and will be saved in following format “Topic call - <topicnumber>”

Screen Pop

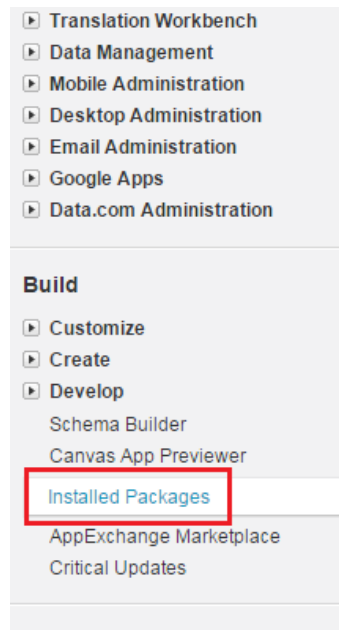
Configure the softphone layout option as given under the “Configuring Softphone Layout” section. Once the configuration is in place, you will get a screen pop on calls.

Note: Screen pop will occur on Inbound, and Outbound calls. The Phone Number (Dialed or Incoming) will be used as the key to search for Salesforce objects.

Note: Screen Pop is not supported in Standard mode.

Uninstalling the ISA Application

To uninstall, click on “Setup”, and navigate to Build -> Installed Packages. Click on “Installed Packages”



After clicking on “Installed Packages”, you will get a list of installed packages. Identify the package that you want to delete. And click on “Uninstall”

Installed Packages

[Help for this Page](#)

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as “In Development” and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.



Installed Packages					
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date
Uninstall	IPOCC_SFConnector	Avaya	1.6	avaya_ipocc_sfc	2/24/2015 2:44 PM
Description IPOCC SFConnector integrates Salesforce CRM Application with IPOCC. Using IPOCC SFConnector app contact center agents can use Salesforce CRM applicati...					
Uninstalled Packages					
No uninstalled package data archives					

You will get a confirmation screen, and options to save the data associated with the package. Click on the checkbox, if you want to delete the package.

Uninstalling a Package

[Help for this Page](#)



Uninstalling this package will:

- Permanently delete all components in this package (listed below)
- Permanently delete all customizations you have made to these components

When you uninstall a package, by default, all its data as well as related notes and attachments are automatically saved as an export file. This file is available for 48 hours in case you need to recover the data. To reload the data, import the export file manually and recreate any relationships between objects. Some components can't be recreated and others require special treatment. You can also prevent the package data from being exported by selecting the appropriate radio button below. [Tell me more](#)

Package Components

Action	Name	Parent Object	Type
	icc_consult_call		Static Resource
	icc_dial_pad		Static Resource
	iccSessionManager		Static Resource
	icc_end_wrap_up		Static Resource
	iccUIController		Static Resource

	iccAppUI		Visualforce Page
	IPOCC_Call_Center_Definition		Call Center
	iccContactSearchController		Apex Class
	iccContactSearchControllerTest		Apex Class

☒ Save a copy of this package's data for 48 hours after uninstall

☐ Do not save a copy of this package's data after uninstall

☒ Yes, I want to uninstall this package and permanently delete all associated components

After clicking on “Uninstall” the package would be uninstalled. You will get the below progress screen.

Installed Packages

[Help for this Page](#)

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Installed Packages

Package Name	Publisher	Version Number	Namespace Prefix	Install Date
SanManagedBeta1	abc	1.2 (Beta 2)	sanTest	12/29/2014 6:22 PM
Description Base ISA Managed package				

Uninstalled Packages

Action	Package Name	Namespace	Expiration Date	Uninstall Status	Uninstall Date
	SanManagedBeta1 (Version Name New Year Eve 0.1)	sanTest	12/31/2014 7:51 PM	In Progress	12/29/2014 7:51 PM

The uninstall process can take a number of minutes to complete. The status of the package is displayed in the **Uninstalled Packages** panel

Installed Packages

[Help for this Page](#)

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Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.



Installed Packages					
No packages installed					

Uninstalled Packages					
Action	Package Name	Namespace	Expiration Date	Uninstall Status	Uninstall Date
Del	ISA_Pkg (Version Name 20150129)	ISA_ManagedBeta	2/5/2015 1:02 PM	Uninstall Complete	2/3/2015 1:02 PM

To completely remove the package, click the **Del** button. The package is deleted from the SFDC a/c.

Troubleshooting the CRM Connector

In case of unexpected behavior in the Salesforce Application, please supply the log files listed below to Avaya support:

- CRM Connector logs in CIE TTrace
- Browser Console: This is a debugging display that is part of the user's browser.

To obtain the log from the Browser Console, the browser's debugging tools will have to be invoked. (This can be achieved in both Firefox and Chrome by pressing "F12".)

Once the debugging tools are displayed, use the tools to select the **Console** display. Recreate the issue while the Console is displayed. When you have finished recreating the issue, highlight the entire contents of the Console display and send the log entries to Avaya Application Support.

Other Troubleshooting Considerations

- A User cannot logout or change their agent state from Available to Break time, when a call is in progress.
- If a user is logged into the ISA App User Interface and is logged off from the Telephony via Supervisor console or Agent console of the Contact Center User Interface, the user will automatically be logged off from ISA App User Interface. The following message is displayed:
"Agent was logged off via Supervisor console or via external endpoint."
- If a user is logged off from the ISA App User Interface, the user is also logged off from the Telephony in the Contact Center User Interface.