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 Comlete 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

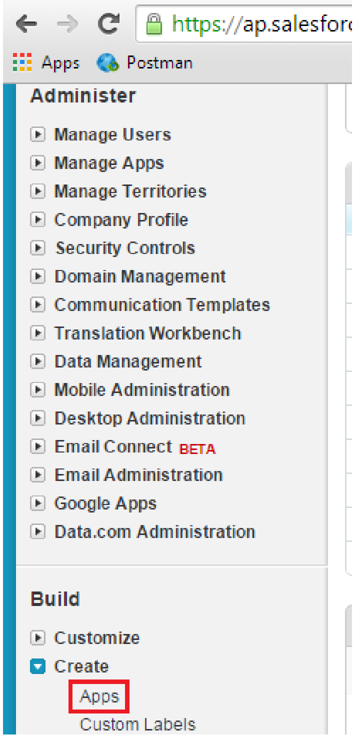
- configure a console app.
- "Call Center" configuration and assigning it to Agents
- Directory Numbers (optional)
- Configure Softphone layouts for screen pop

Custom Console Component

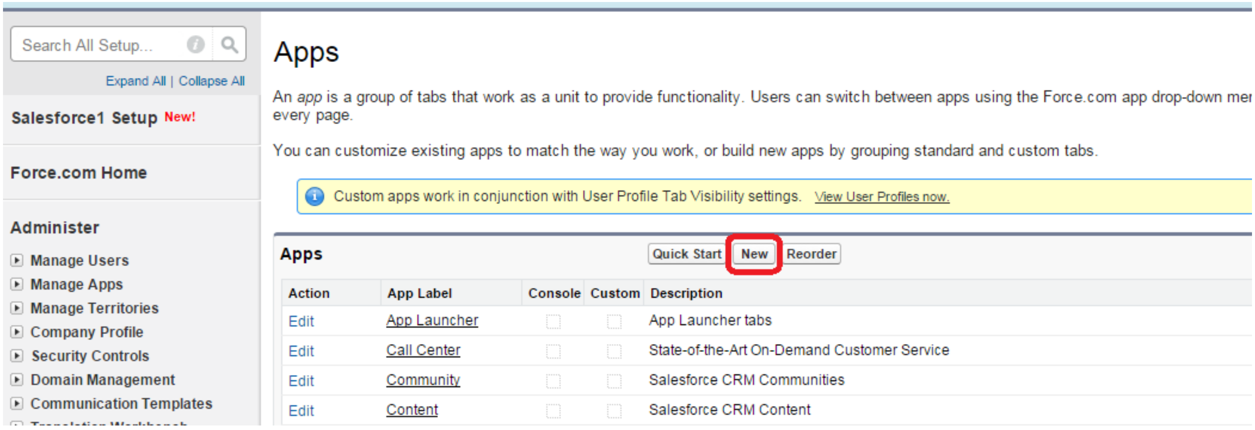
Salesforce Console is geared more towards a contact center agent. It provides a dashboard like interface, and eliminates the multiple tabs. Instead a navigation tab is provided. Switching between navigation tabs doesn't reloads the app, due to which context is preserved. ISA window can be minimized and 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

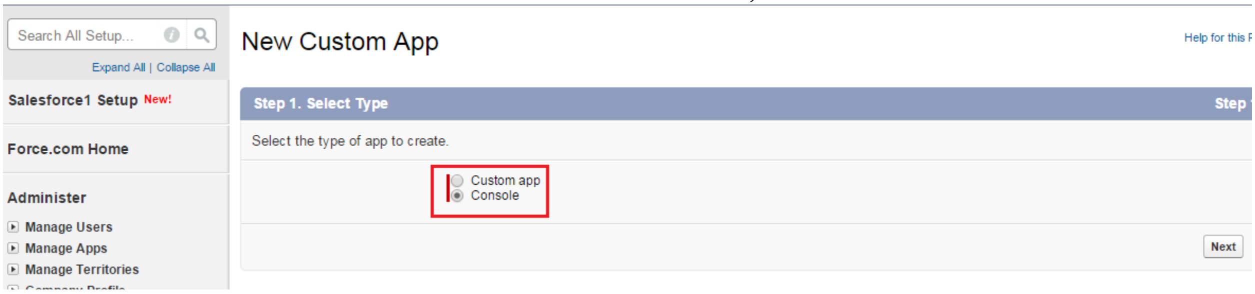
Under Setup, Navigate to Build -> Create -> Apps, as shown below



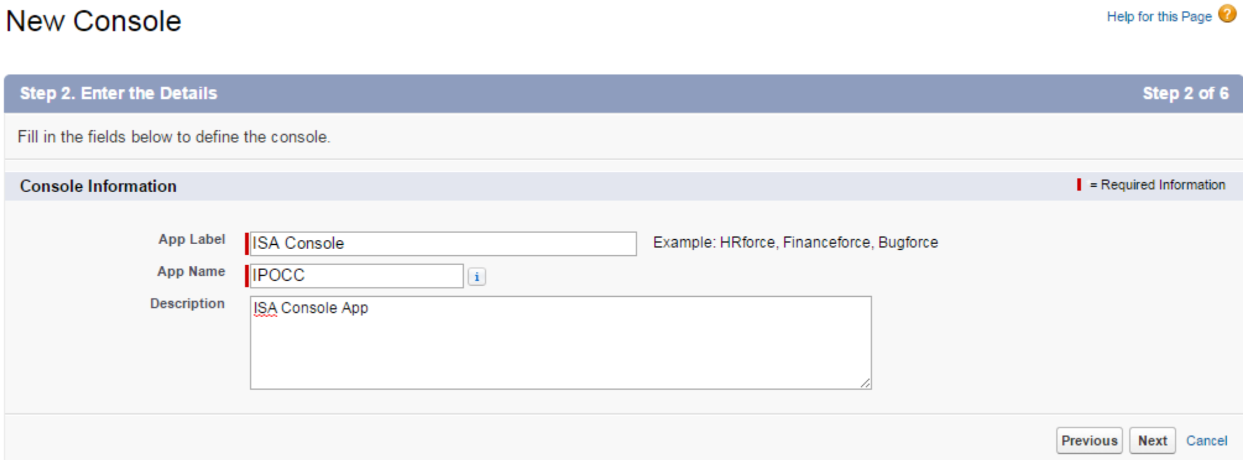
After clicking on "Apps", you will get below screen. Click on "New"



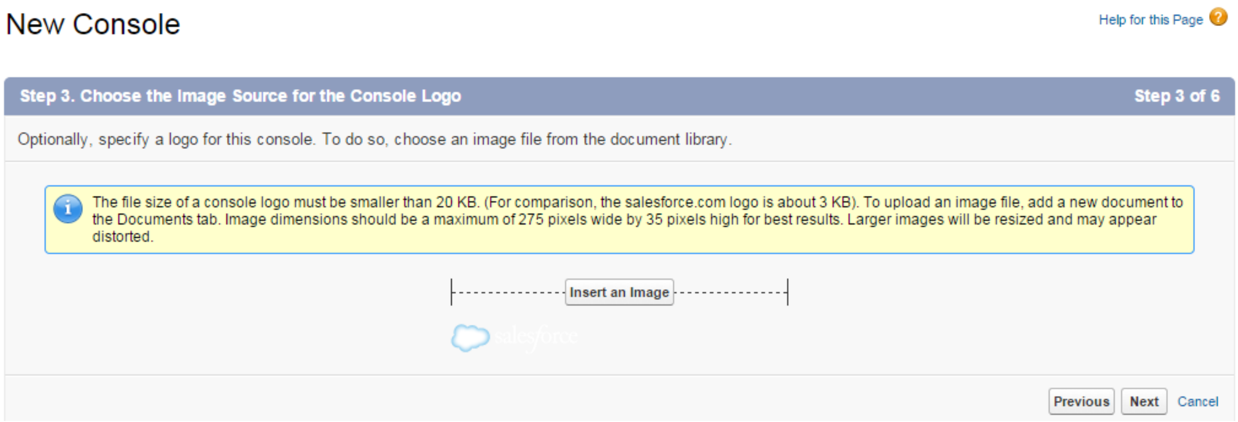
You will need to select "Console", and click "Next"



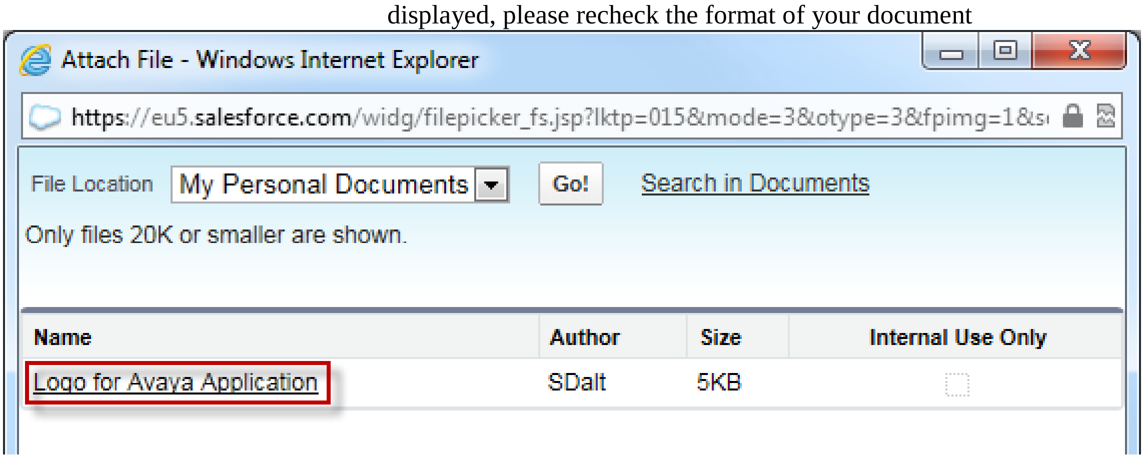
Enter an **App Label** and **App Name** for the Console App as per the conventions of your organization



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

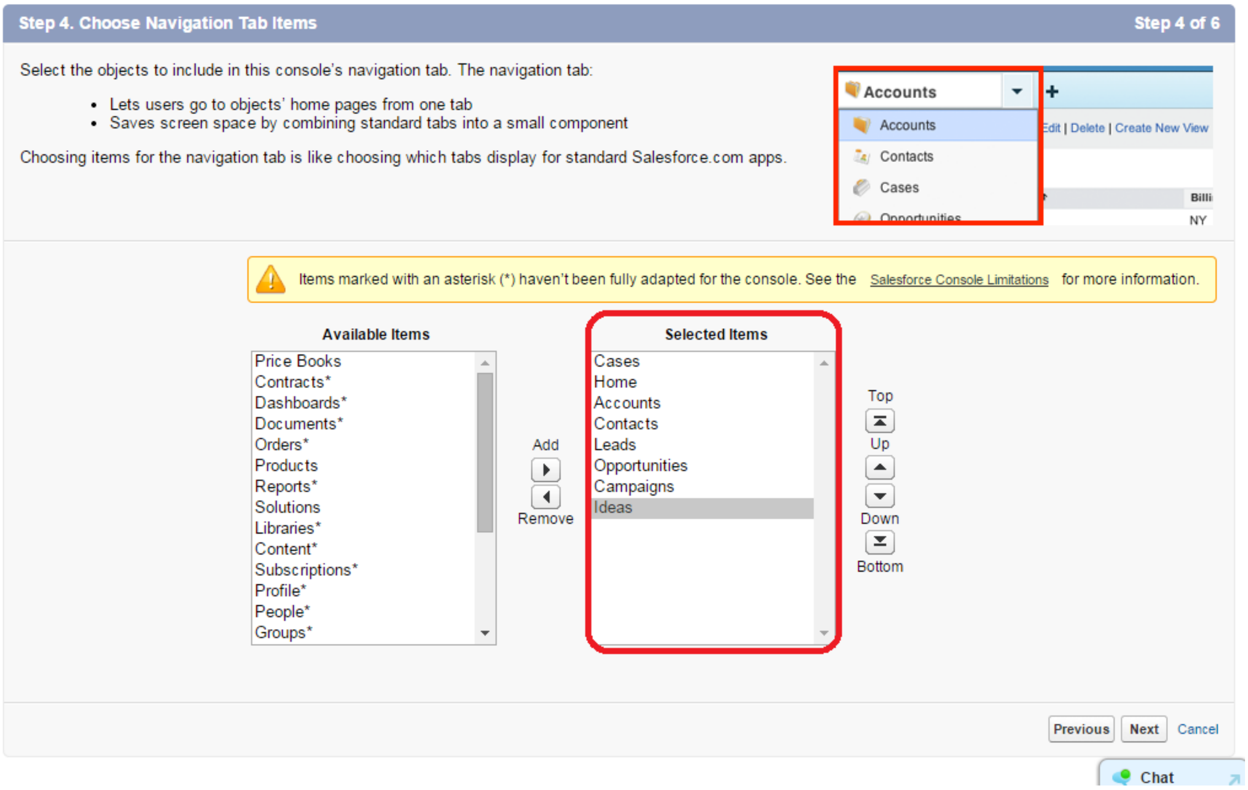


Select the **uploaded document** for your logo. If the logo document is not displayed, please recheck the format of your document

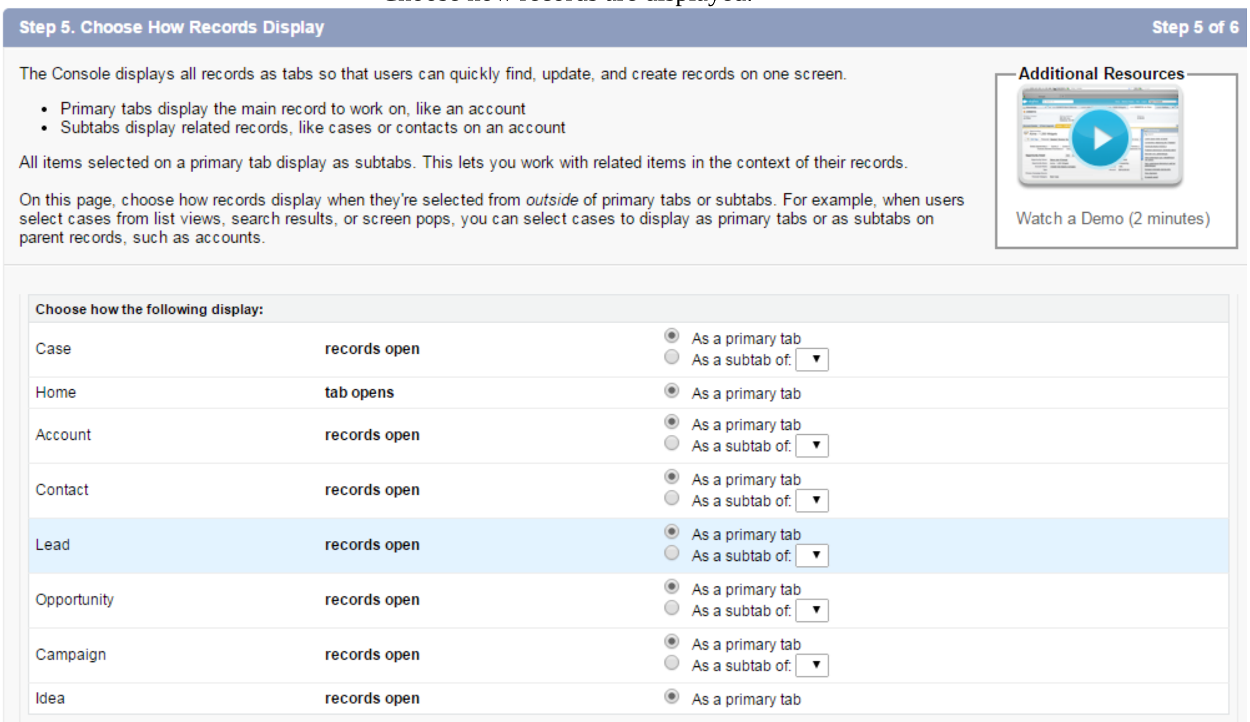


The logo is displayed. Click the **Next** button.

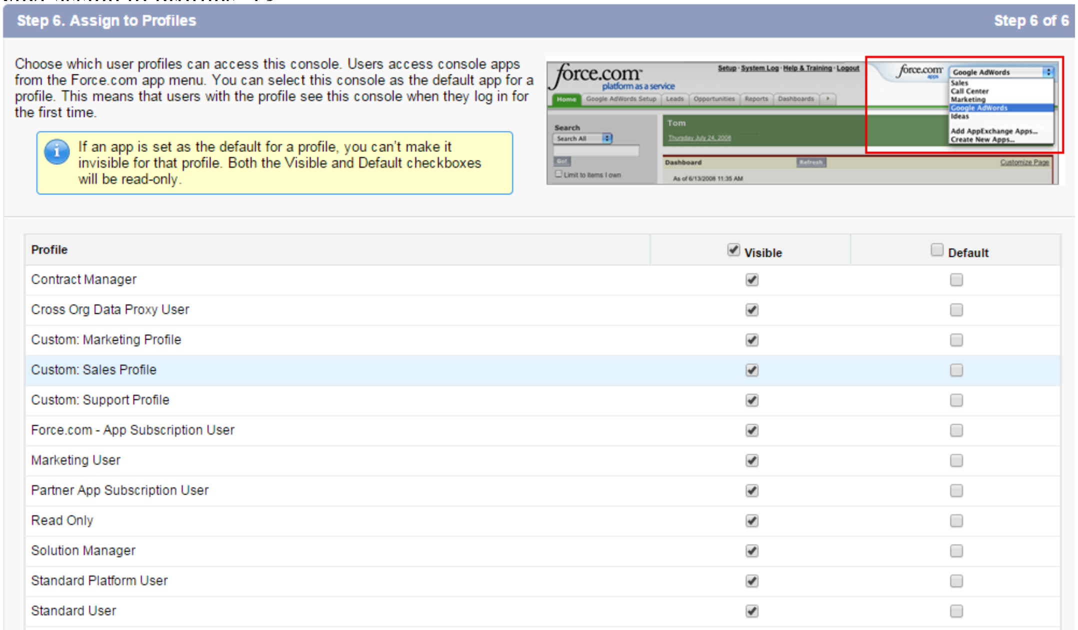
Click the **Navigation Tab** items to be displayed in console mode. Then select the **Next** button.



Choose how records are displayed.

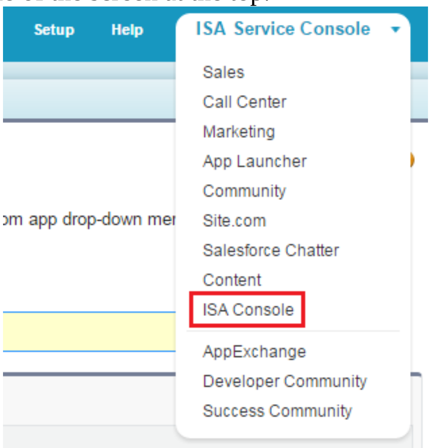


Next assign to profiles. 13

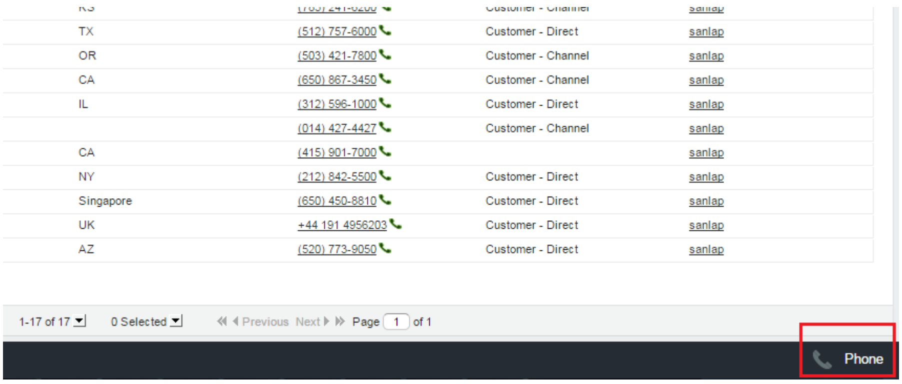


Click on "Save". The App will get saved.

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.



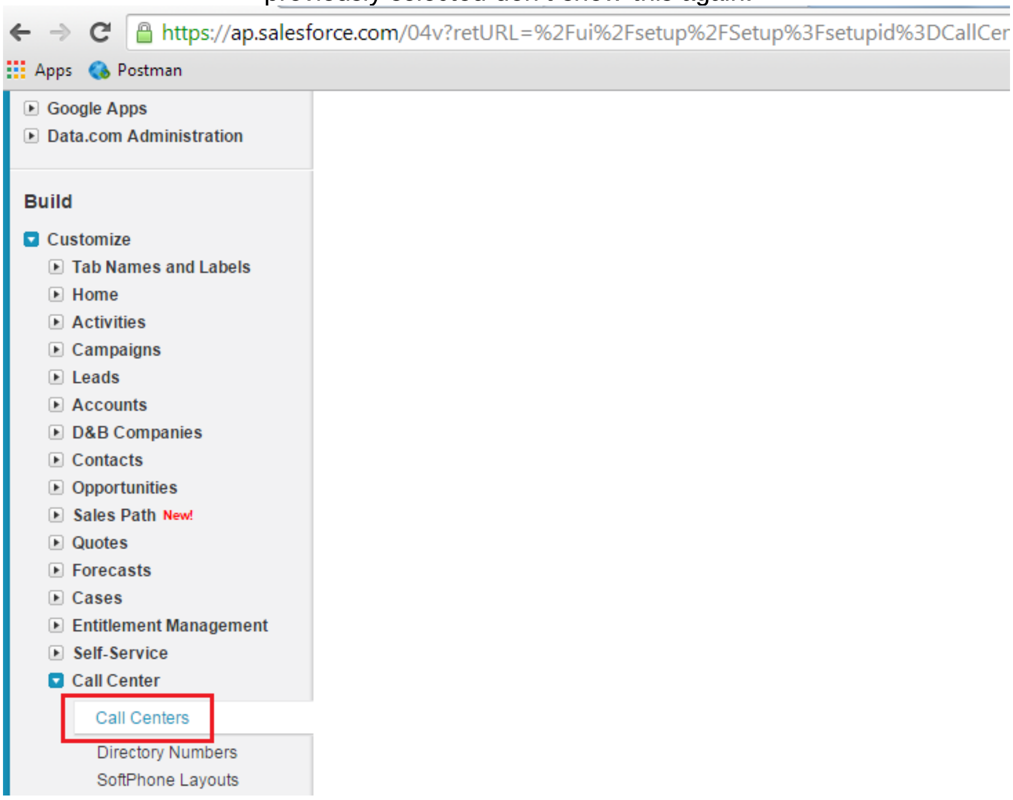
Click on "Phone", the softphone will pop. If contact center is configured, the login screen will be seen as shown below

Configuring Contact Centre

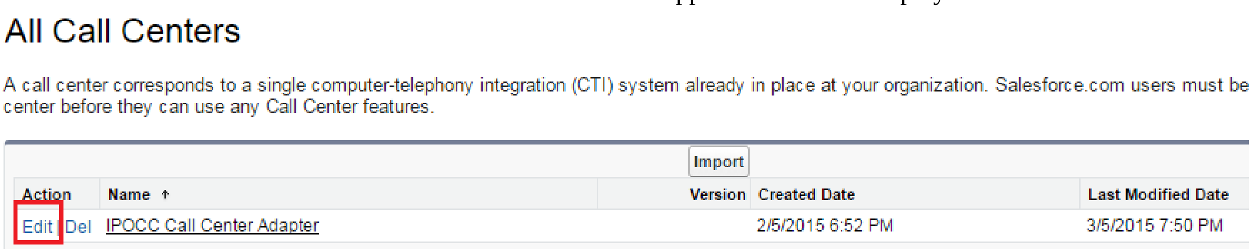
Once ISA is installed, you will need to provide IP address and port of CIE Server.

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.



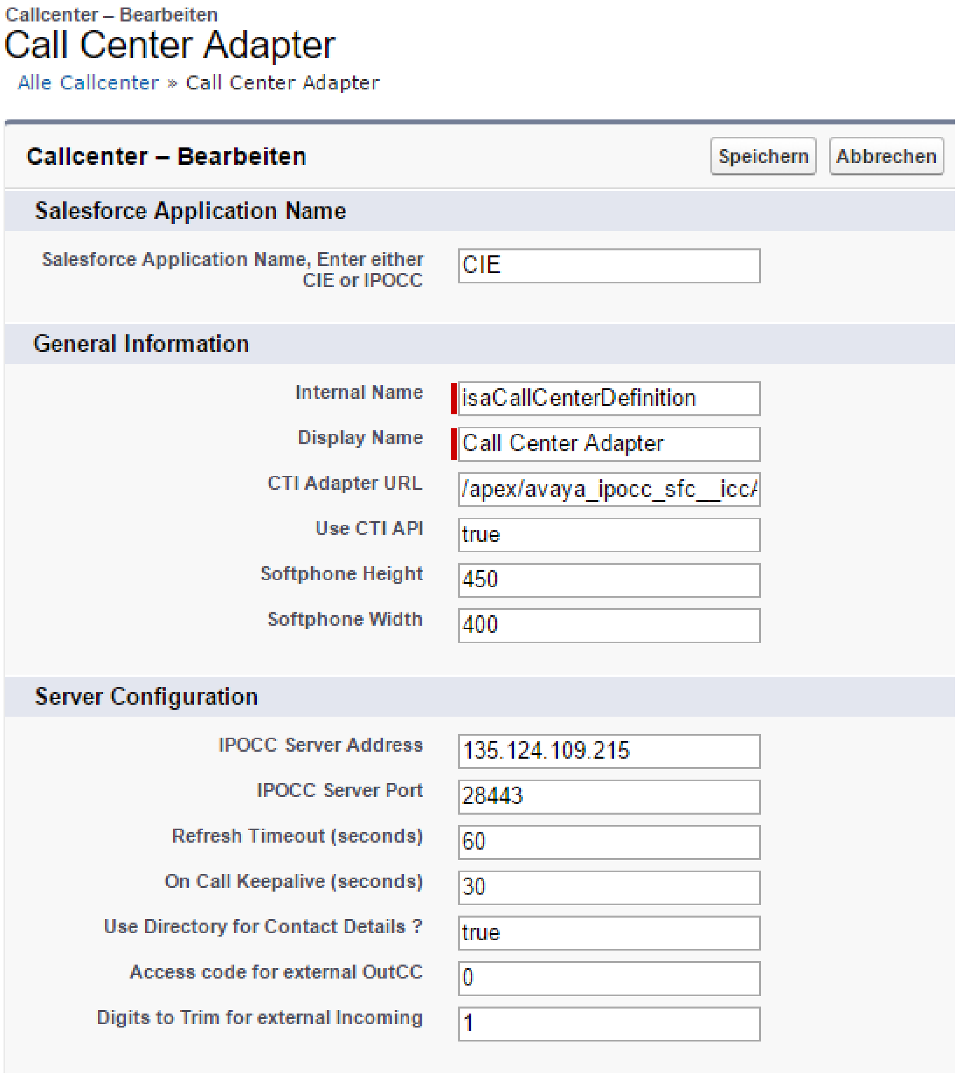
The installed Call Center Application will be displayed. Click on Edit



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.



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.

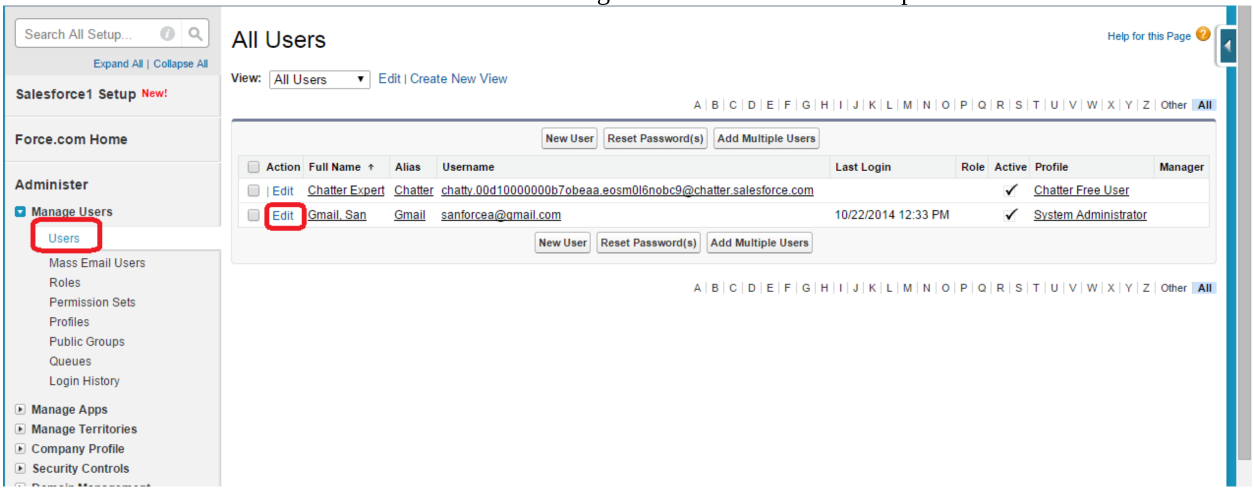
Be very careful while changing these default timeout values. Change these values only if you understand the implications.

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.

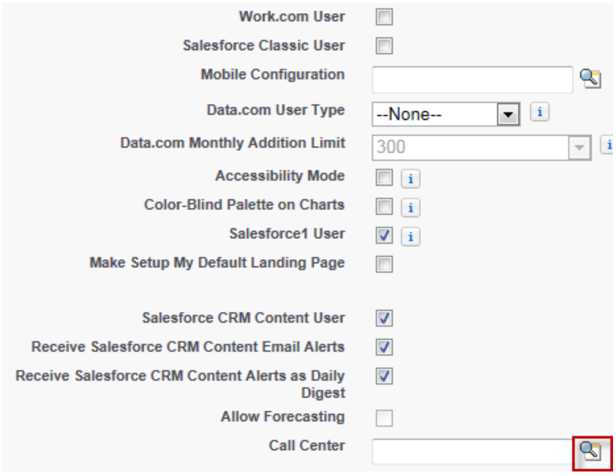
Access code for external OutCC this code will be used for outbound dialing.

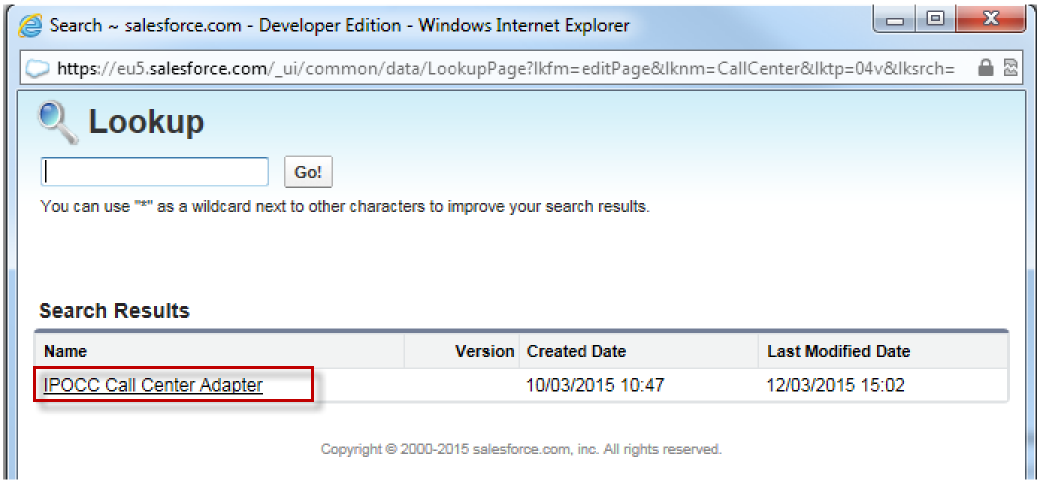
Digits to Trim for external incoming: This number is used to trim digits from incoming external call. The trimmed number will be used for lookup in salesforce database. For e.g. If this number is configured to be 1, and an external incoming number is 9123456. ISA will do a lookup for "123456". i.e it 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.

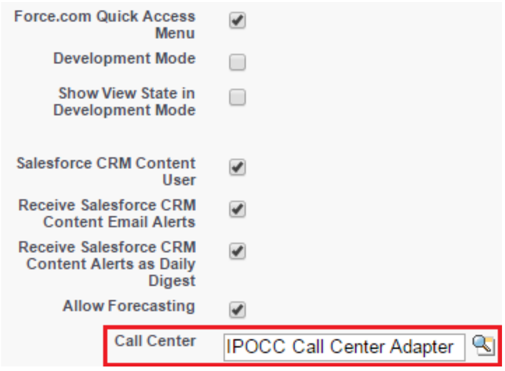
The application needs to be made available to the agents that you want. Under Administer-> Manage Users -> Users. Edit the specified users



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.



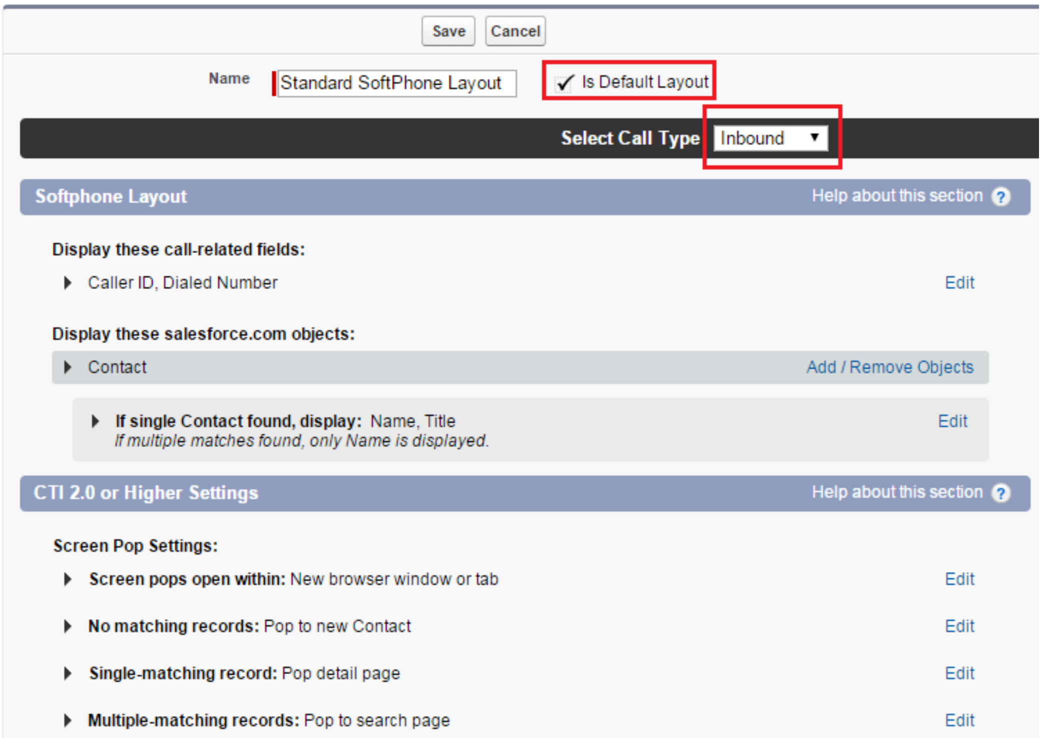




The Adaptor is now added, click the **Save** button.

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_phonelayoutscreate.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.

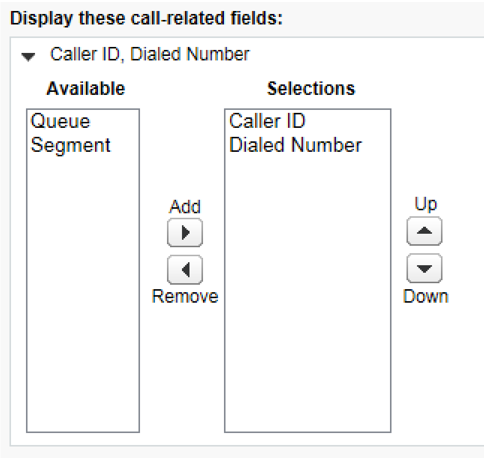


Check the “Is Default Layout” checkbox.

The Call Type is “Inbound”

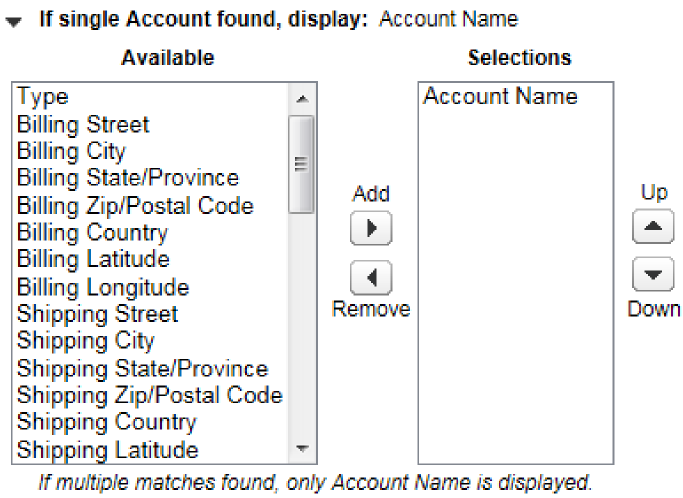
You will need to edit these sections. The layout is of three sections. The first section, “Display these call-related fields”, controls what items will be displayed for a call, when the information is available. The next section contains what Salesforce database objects will be displayed on a successful 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 configure d in the first section, “Display these call-related fields”. Click the options to be displayed for a call from **Caller ID, Dialed Number**

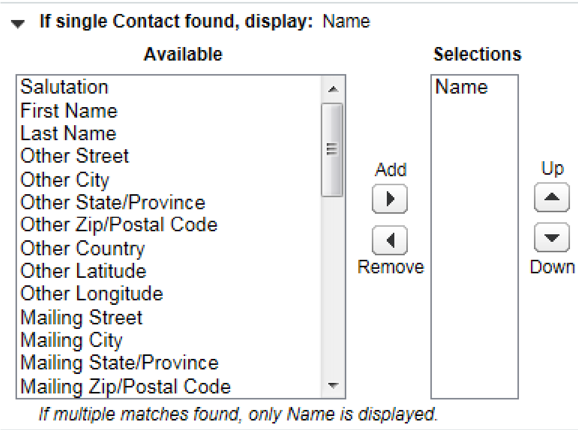


Select which Salesforce database objects will be displayed on a successful screen pop, along with the fields contained within the object to be displayed. Go to Add/Remove objects to display Salesforce data objects

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.



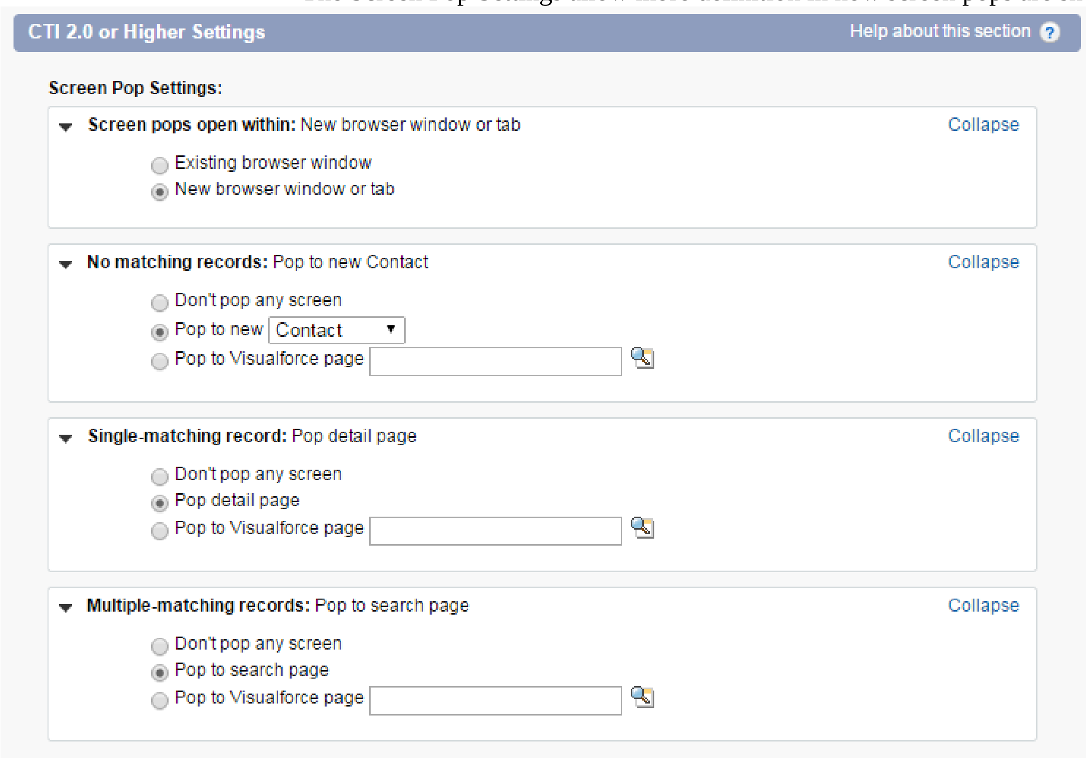
A Contact look up only displays one contact. If multiple matches are found only the contact Name is displayed. Contact look up search parameters can be added from the **Available** field to the **Selections** field.



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.



The first option determines where the screen pop will occur. It can pop within th e 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 ch oices are to have no pop at all, to pop to a new Salesforce object (e.g. a new Cont act)

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

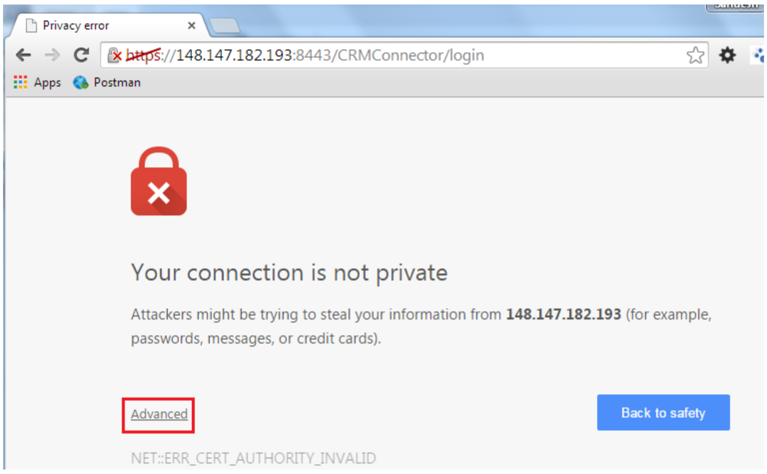
Accepting the CRM Connector Certificate prior to Logging into ISA

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

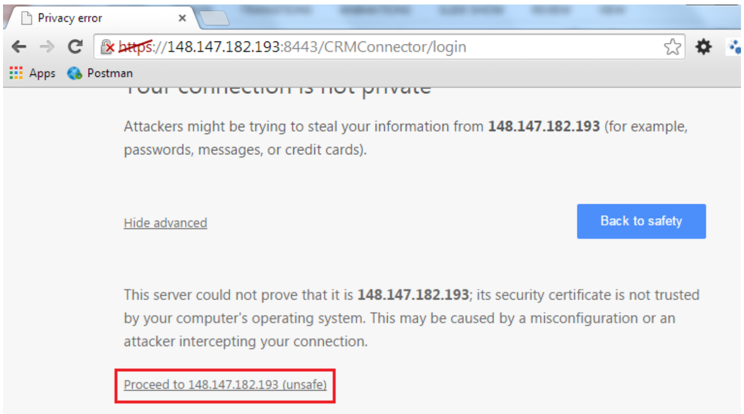
In your browser, enter the URL at **Fehler! Hyperlink-Referenz ungültig.**

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



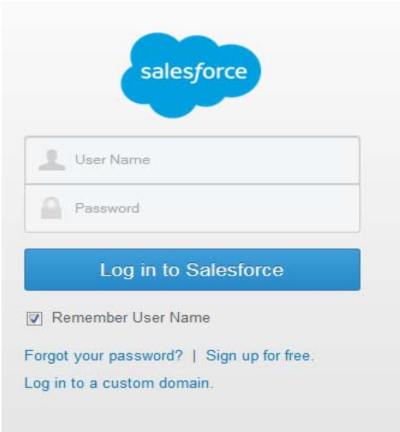
Click on “Proceed to ….”. The certificate will be accepted.

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

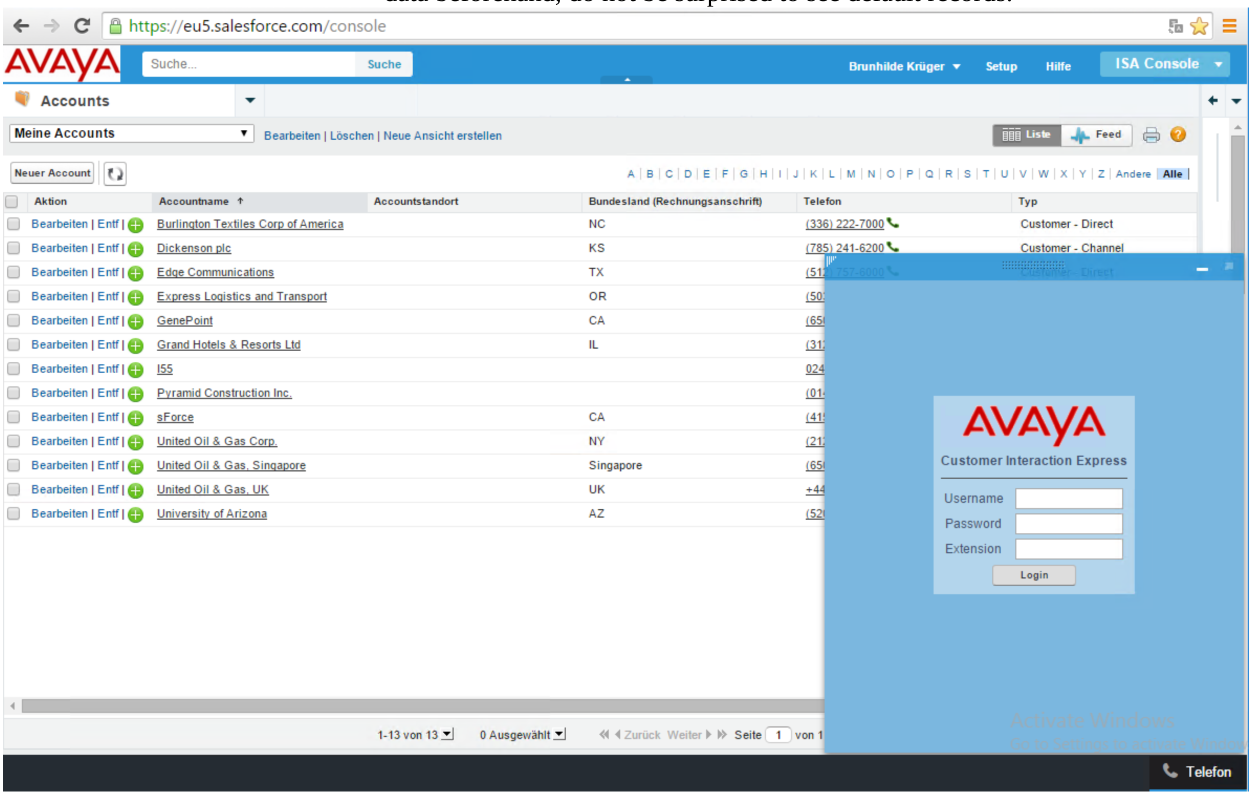


Login to ISA

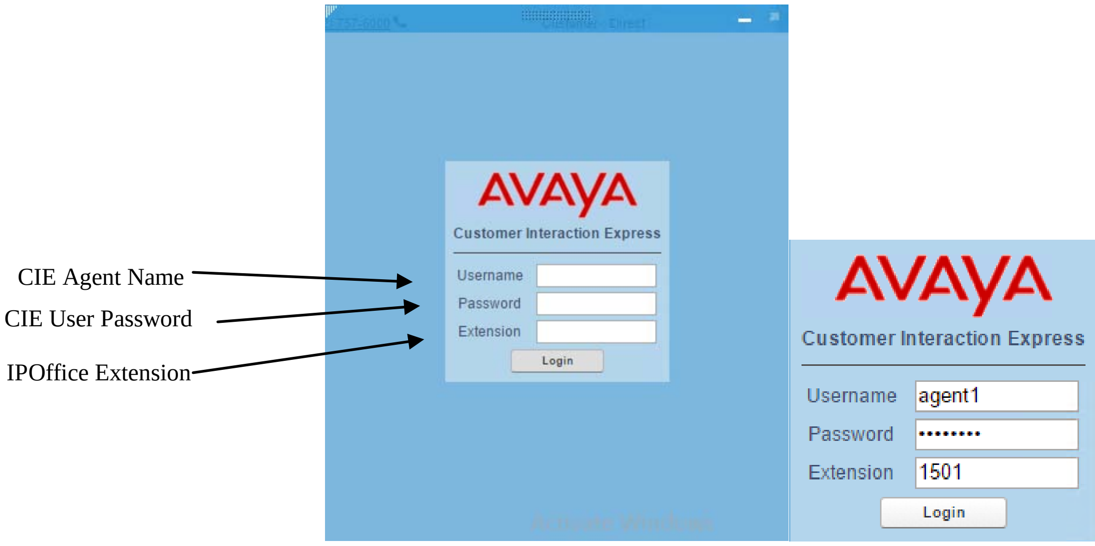
Once the agent has logged into Salesforce, the IP Office Contact Center Salesforce App(ISA) will be loaded in the bottom right side of browser, as illustrated below.

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.



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

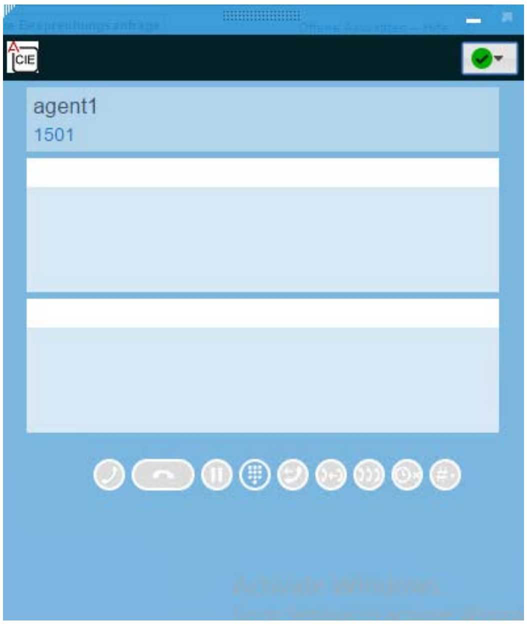


The agent then enters his credentials, as shown (The actual values will differ)

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.

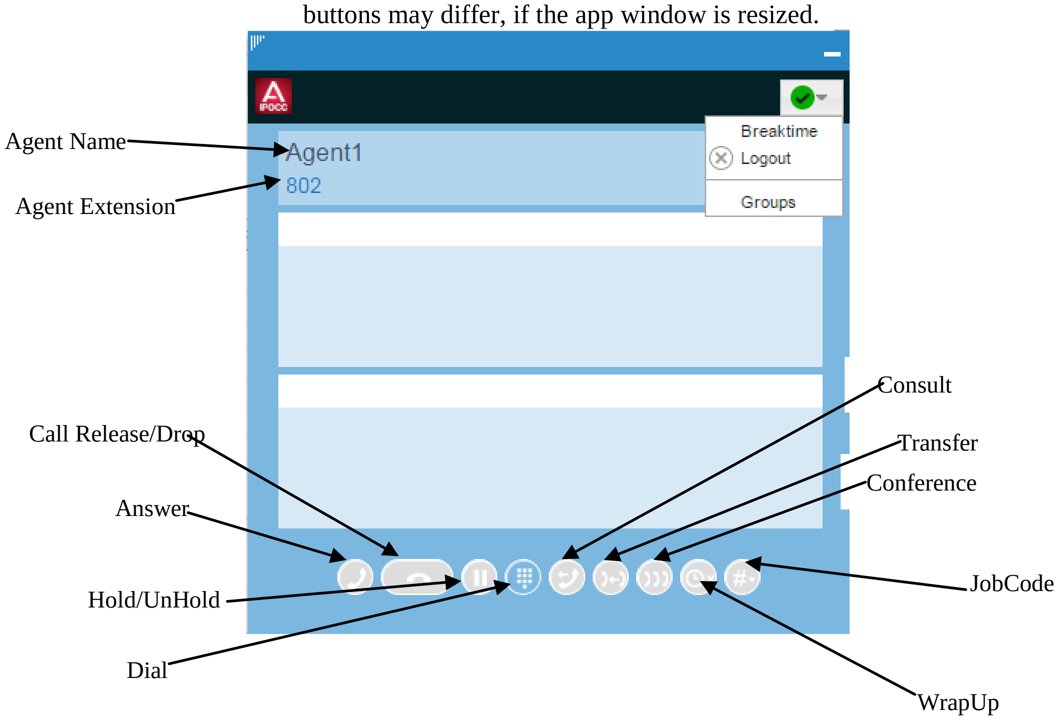
If user is logged into ISA and is logged off from the Telephony via Supervisor console or Agent console of the IP Office Contact Center thick User Interface, the user is automatically logged off from ISA. The following message is displayed Agent was logged off via Supervisor console or via external endpoint.

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.

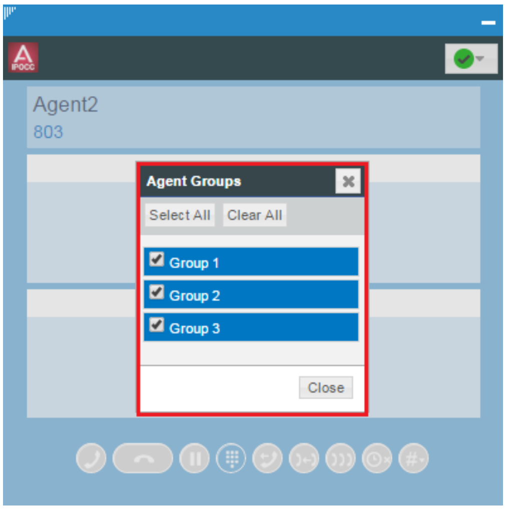


Note: The Agent State is visible on the top right, as a select option widget. The green icon indicates that the agent is available. The red icon indicates that the agent is on breaktime. The state of the agent can also be updated by the Supervisor or the Agent them from CIE User Interface. The changes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

Operation

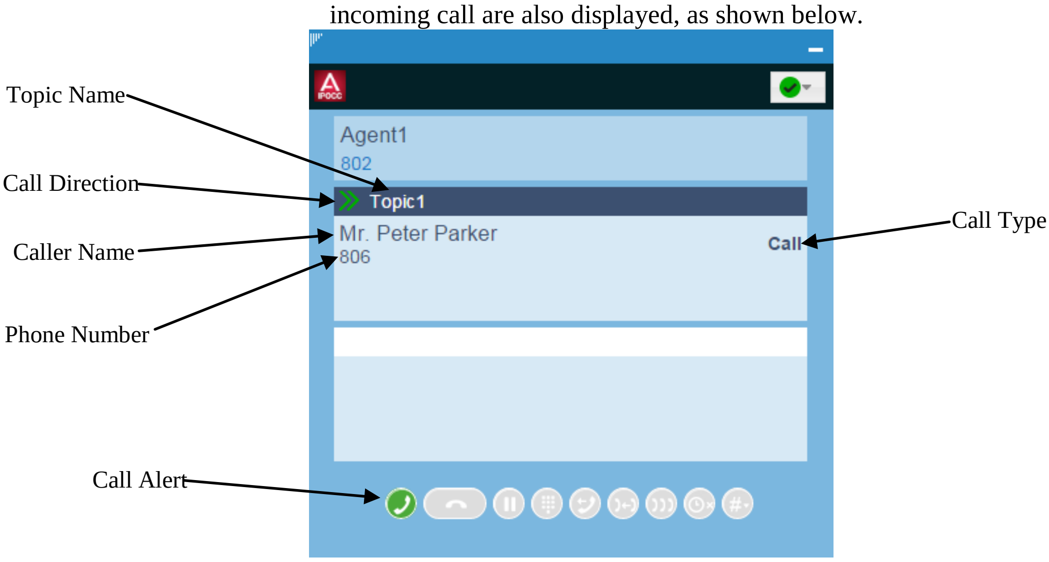
Agent Group Sign-On/Off

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



Receiving Calls

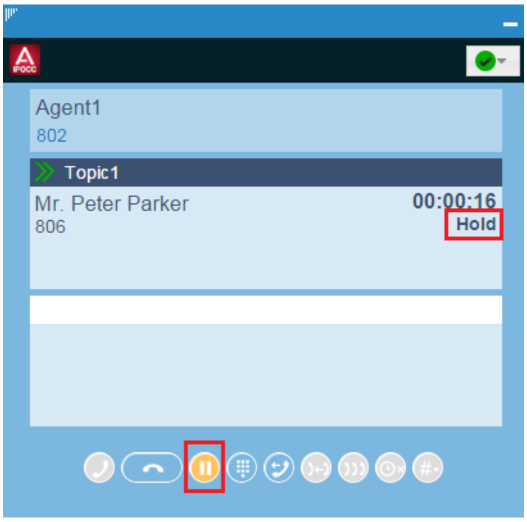
After successful login, Agent can receive incoming calls. When an incoming call arrives, the "Call Pickup" button becomes green, and blinks. Details about the incoming call are also displayed, as shown below.



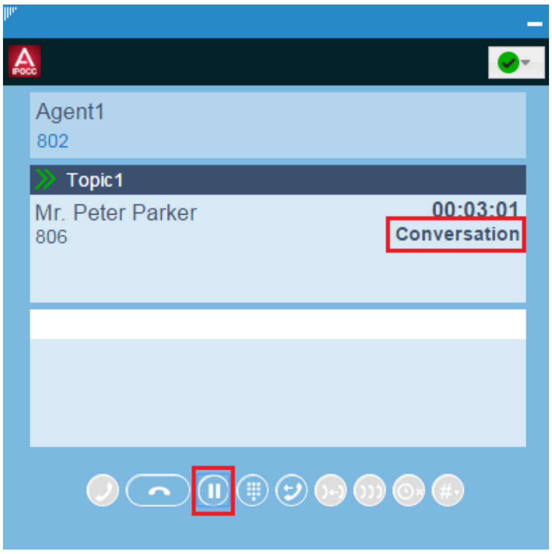
Agent accepts the call, by clicking on the "Call Pickup" button. Once the call is answered, the conversation starts, and the screen changes as below. The duration of the call, direction of the call is shown along with incoming contact details. The incoming Contact must be pre-configured in Salesforce,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

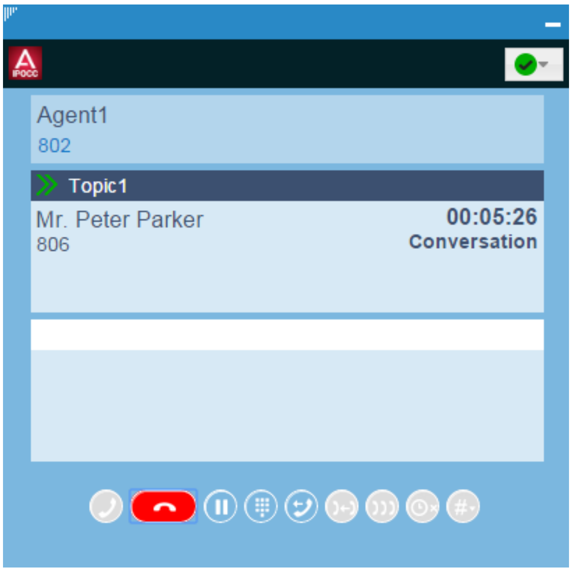


The call can be taken off hold by once again clicking on the **Hold**. The status of the call will change accordingly.



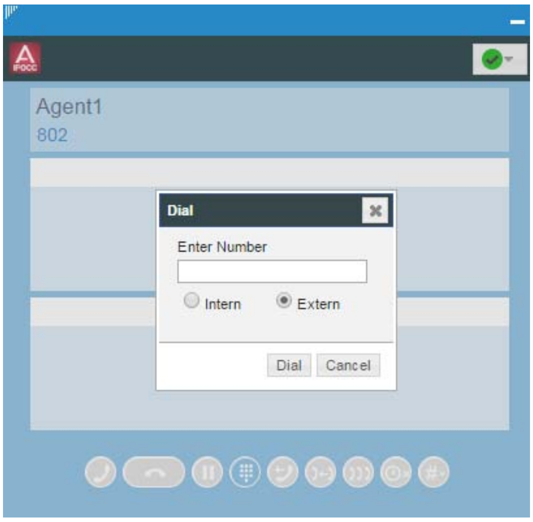
Drop Call

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



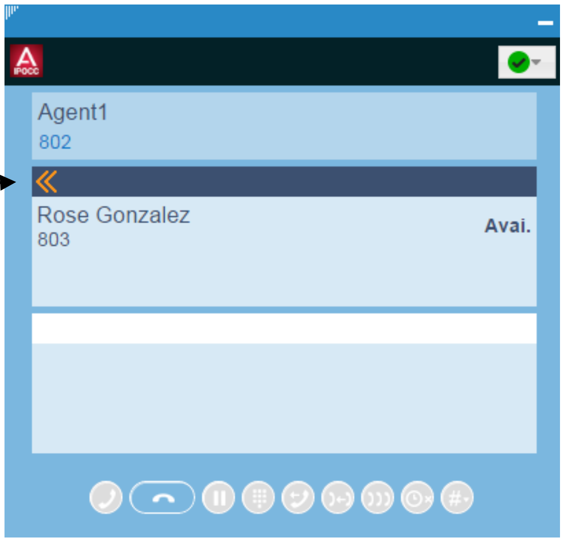
Outbound Call

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”.

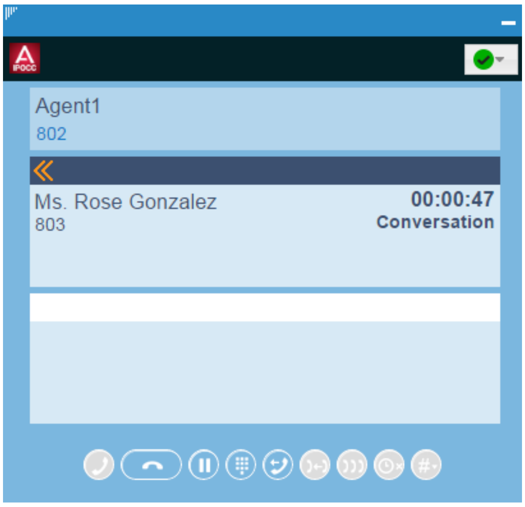


Once the “Dial” button is hit, the dialog disappears, and the status of the call, and the other party is shown.

Call Direction

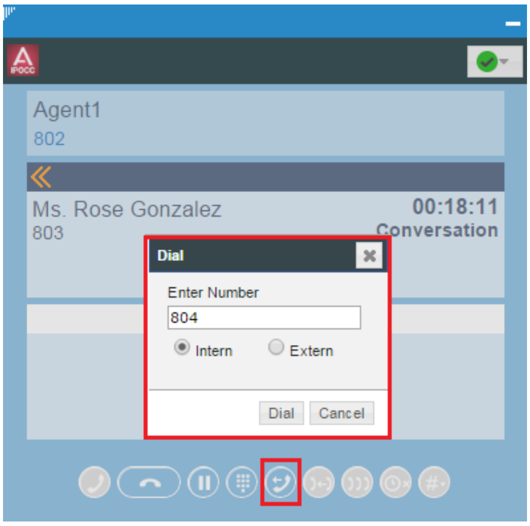


Once the other party accepts the call, the call is connected, and the status is updated to Conversation, as shown below

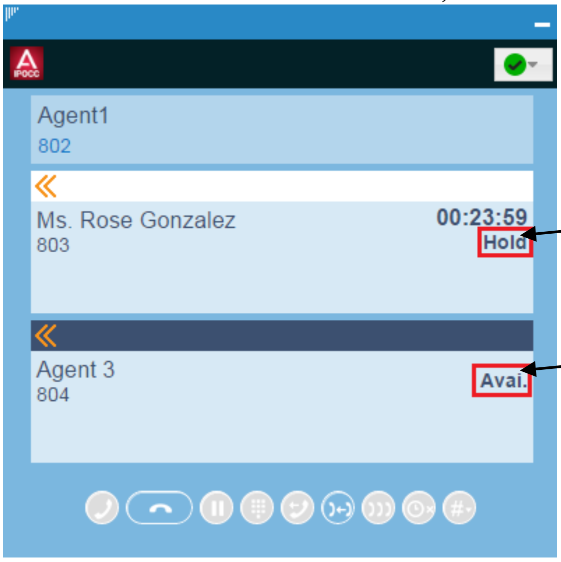


Consult

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.



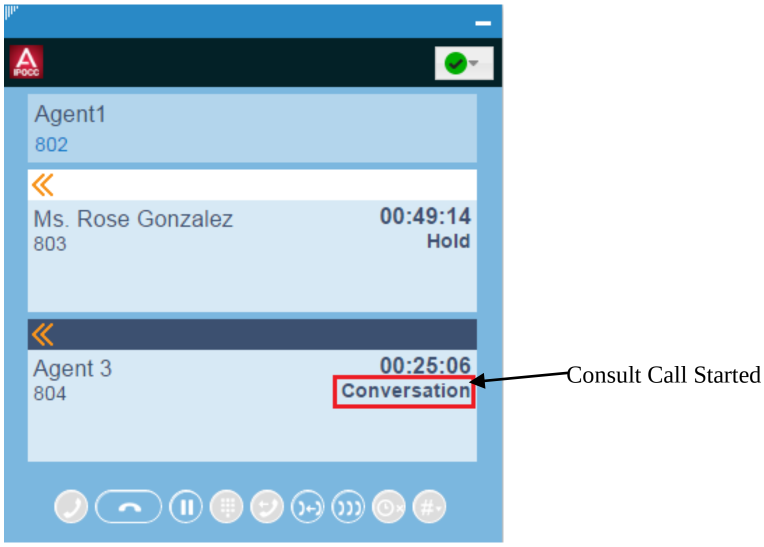
The agent enters the number for consult, and clicks "Dial". The current call goes on Hold. The status of the consult call, is shown.



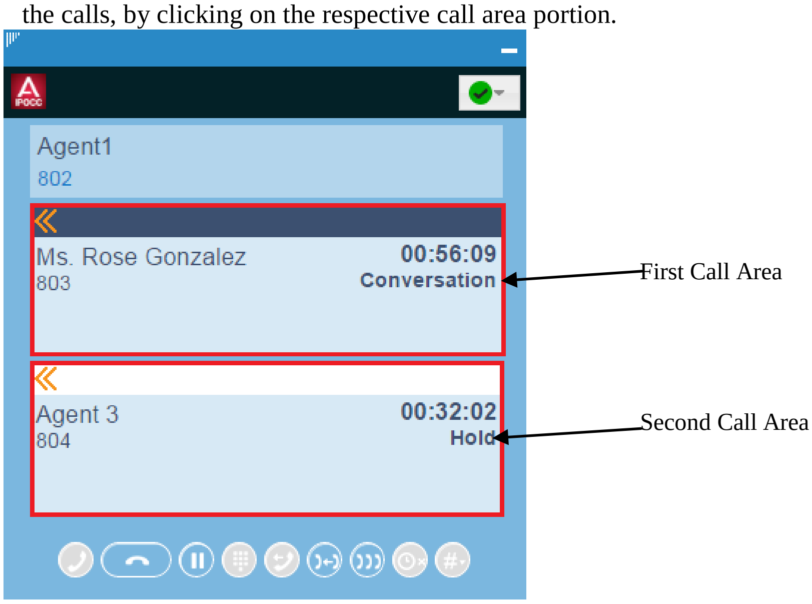
Original Call goes on Hold

Consult Call

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.

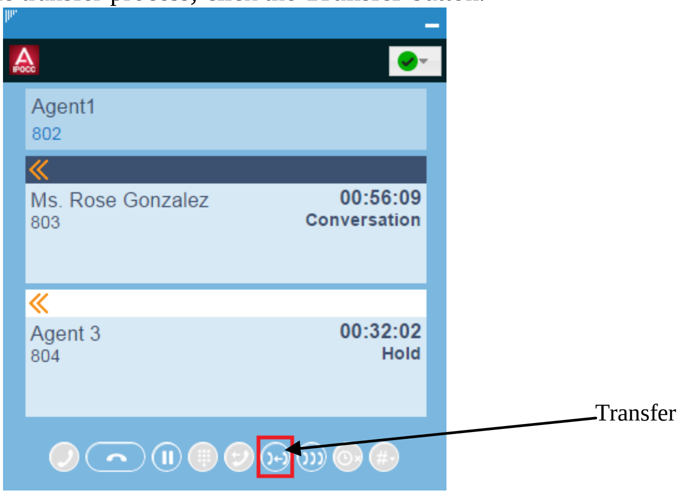
When the ‘consult call’ ends, the original call is still in a Hold state. Therefore to “unhold” the call the agent must once again click the Hold button.

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

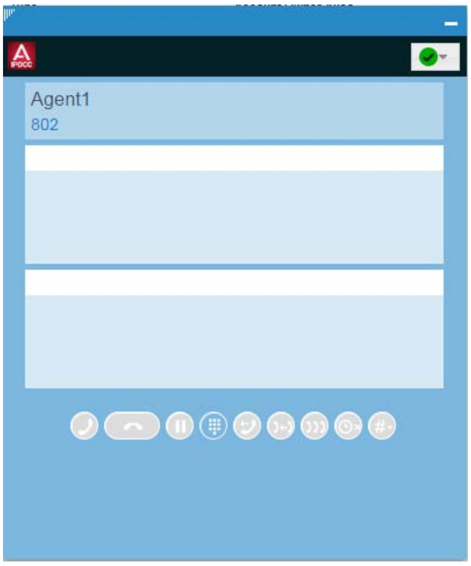
Transfer

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.



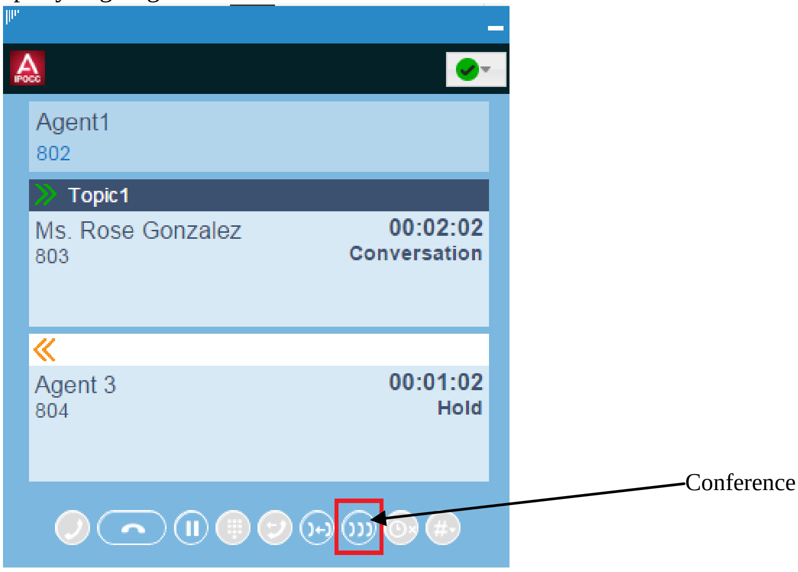
Once the transfer button is clicked, the call is transferred from the agent.



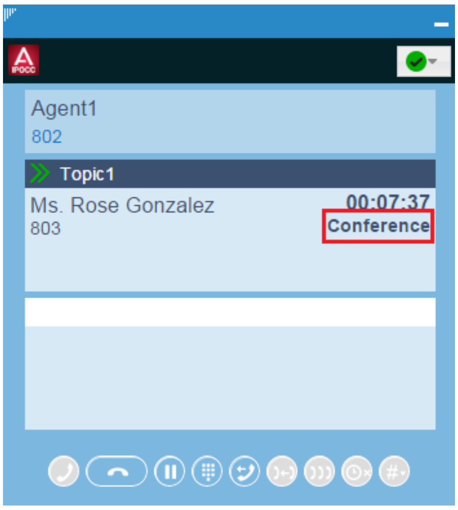
Conference

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.

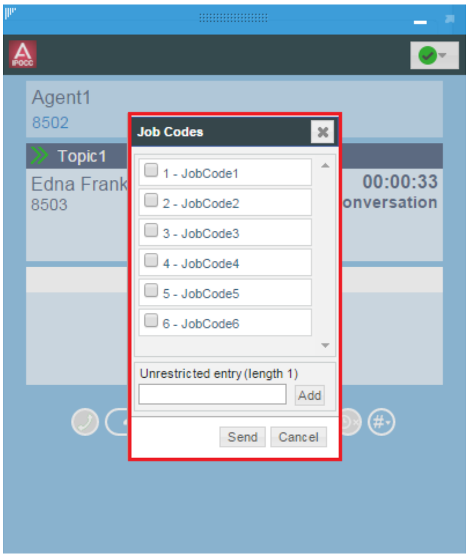


If the agent wants to add another party into the conference. The agents needs to follow the same process. i.e. dial the number, connect the call, and then click on conference button.

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

Job Codes

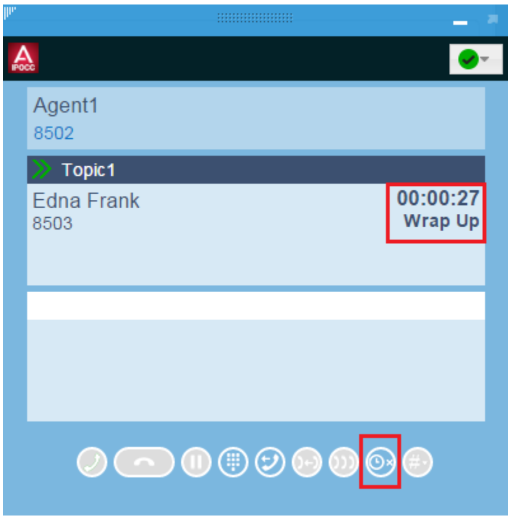
Agent can send Job Codes, by clicking on the Job Code button. After clicking on the button, the agent will see a pop-up as shown below.



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

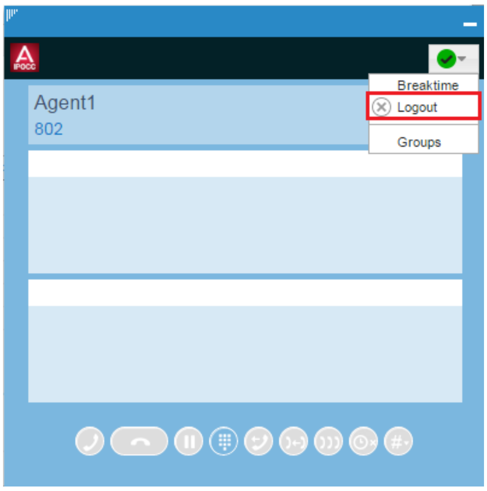
Wrap-Up

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

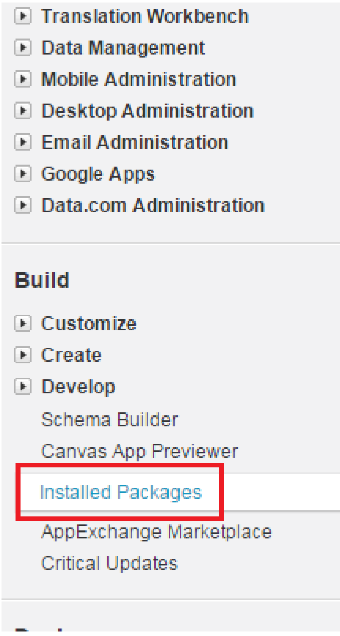
Configure the softphone layout option as given under the “Configuring Softphone Layout” section. Once the configuration is in place, you will get a screen pop on calls.

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.

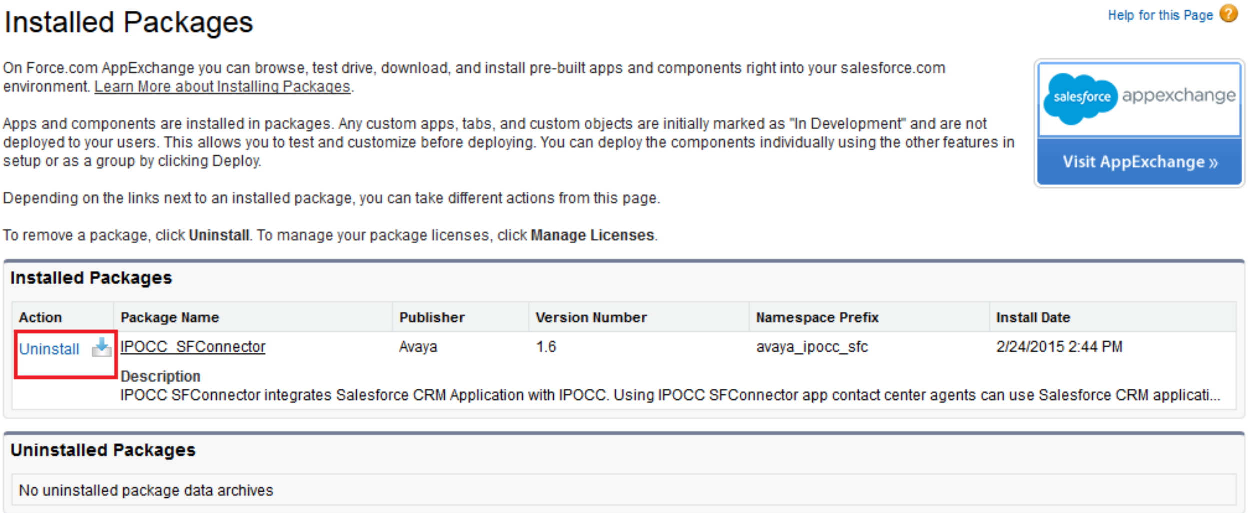
Note: Screen Pop is not supported in Standard mode.

Uninstalling the ISA Application

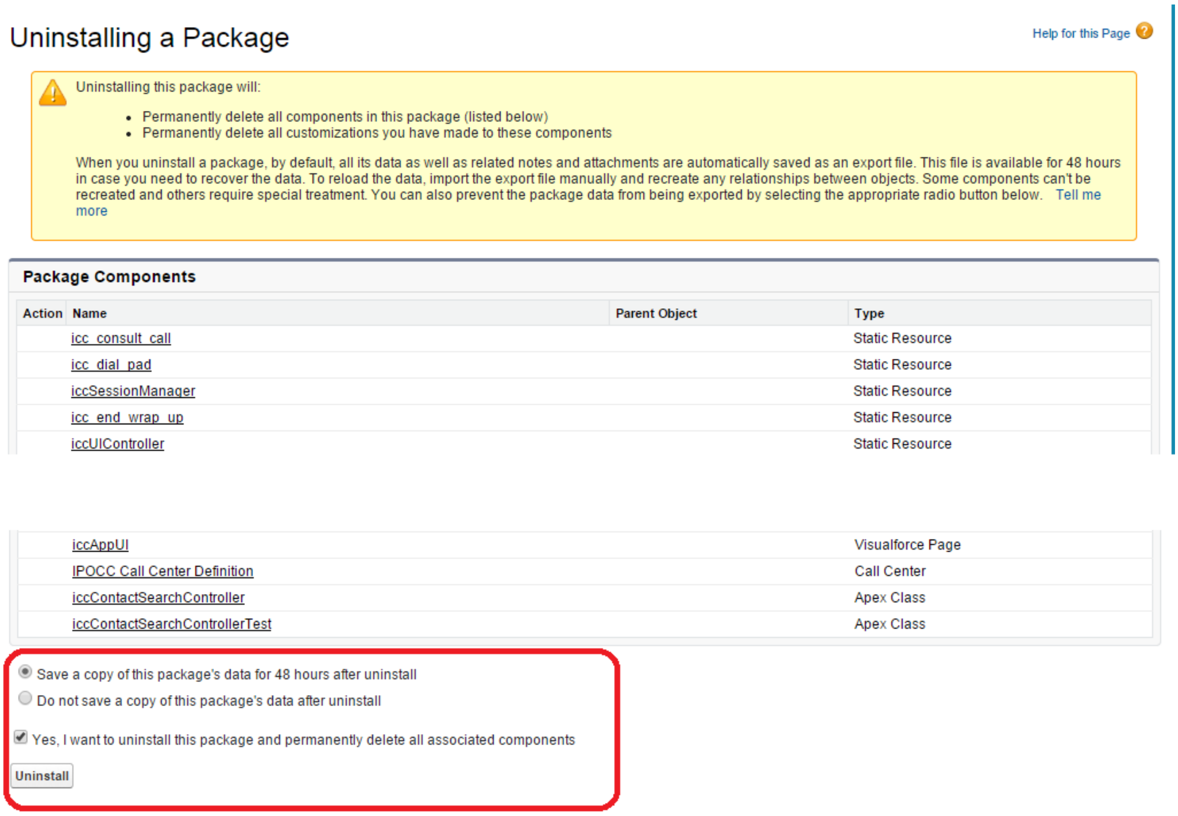
To uninstall, click on “Setup”, and navigate to Build -> Installed Packages. Click on “Installed Packages”



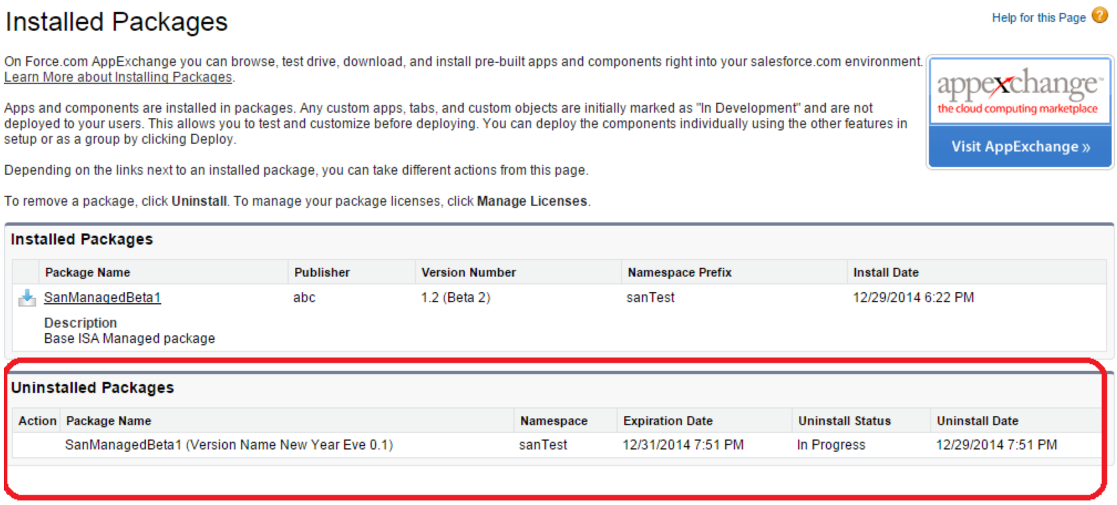
After clicking on “Installed Packages”, you will get a list of installed packages. Identify the package that you want to delete. And click on “Uninstall”



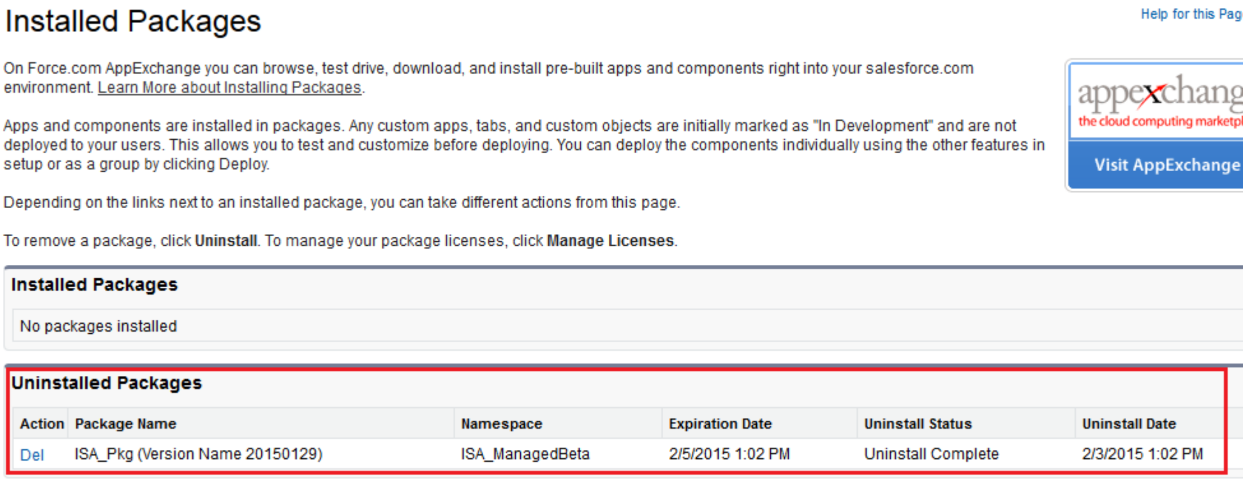
You will get a confirmation screen, and options to save the data associated with the package. Click on the checkbox, if you want to delete the package.



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



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



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.