Workforce Management for Salesforce

User Guide Release Versions 1.5 +

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1. Introduction

Welcome to Dialed, the world's only native workforce management solution for the Salesforce platform, available on the Salesforce AppExchange.

The following document will guide you through the installation process of the app and how to configure it to your needs.

At Dialed, we aim to take the complexity out of managing your contact center workloads even if your Salesforce org is heavily customized.

1.1 Grant Licenses & Permissions

Get started with configuring Dialed by assigning a license to all users and agents. Planners, forecasters, and dialed administrators will also require a permission set.

To add users to Dialed:

- Navigate **Setup > … Installed Packages**
- Locate the **Dialed** managed package, and open the package by clicking on the name **Dialed**.
- Click on **Add Users**.
- Add all the Salesforce users that you want to have access to Dialed, as well as the agents you want to include in handle time tracking (see FocusTracker below)

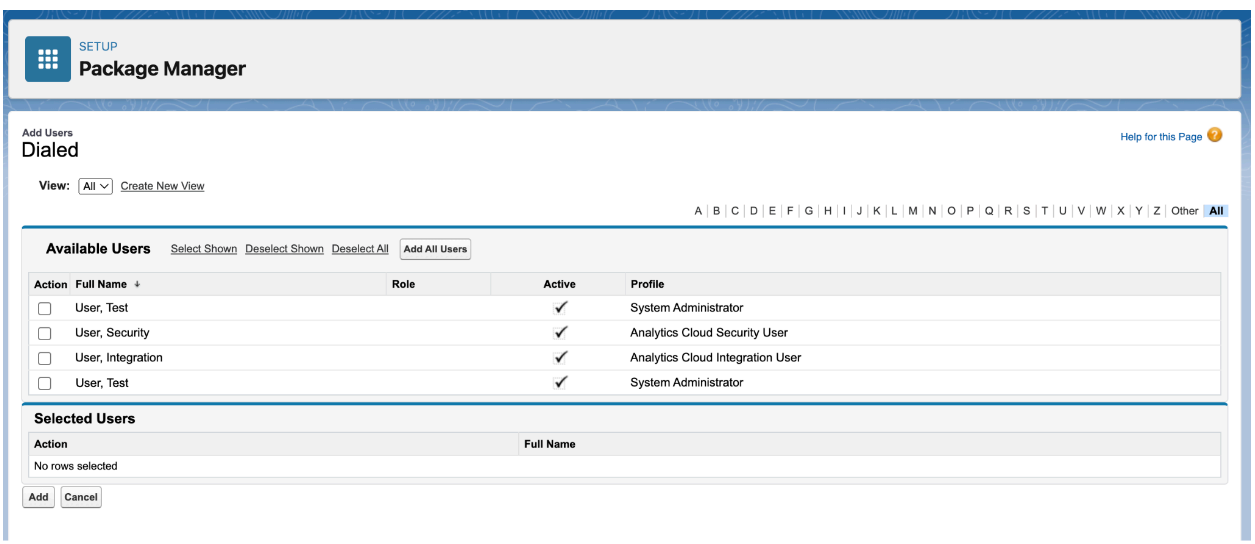


Figure 0 - Adding Users to Dialed.

1.1.2 Permission Sets

Dialed allows you to control access to features using the following two permission sets:

Dialed Admin
- Access the Dialed Setup menu
- Create and modify workloads
- Enables all functionality of Dialed Planner (below)

Dialed Planner
- Create and modify forecasts
- Create and modify Workplaces
- Create and modify Shift Templates
- Create, modify and publish Shift Schedules

2. Manage Workloads

2.1 Introduction to Workloads

A Workload in Dialed is an abstraction for any type of work that your internal teams work on, such as Cases, Voice Calls & Messaging Sessions, which tells Dialed how to track your workforce's effort. Some of the most popular types of work performed in Salesforce are included in the table 2.1.1 below.

Work Type or Channel	Salesforce Objects
Email Work	Case + EmailMessage
Web-to-Case, Email-to-Case, API-to-Case	Case
Inbound or Outbound Telephony	VoiceCall
Chat	ChatTranscript or Messaging Session
Messaging (WhatsApp, Facebook, etc)	Messaging Session
Custom Object	Any custom object

Table 2.1.1

2.2 Create Workloads

Navigate to the **Dialed** App from the Salesforce App Launcher and go to the **Workloads** tab. You can also navigate to the **Workloads** tab within **Dialed Setup** to quick create workloads using pre-built templates.

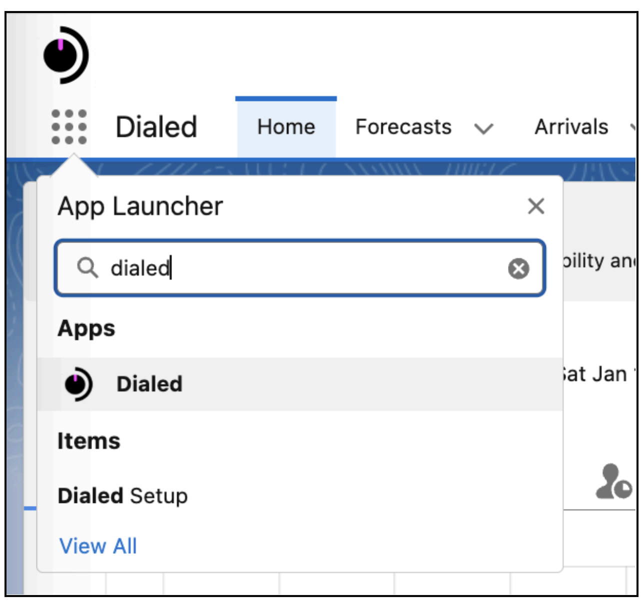


Figure 1: Dialed App and Dialed Setup from App Launcher

To create a workload:

- Click on the **Workloads** tab and click **New**.
- Enter a Name for the Workload
- Enter a Description
- Select the Salesforce object associated with the workload: Case; ChatTranscript; MessagingSession; VoiceCall; Custom Object (see below for Custom Object details)
- Select a staffing type: Erlang or Standard. This helps Dialed to calculate the staffing for this type of work. For asynchronous types of work like case, email, web this is typically Standard. For voice based channels this is typically Erlang.
- Select a concurrency rate: typically how many work items can be managed concurrently. This value will be 1 for phone calls, but may be 3 for chats.

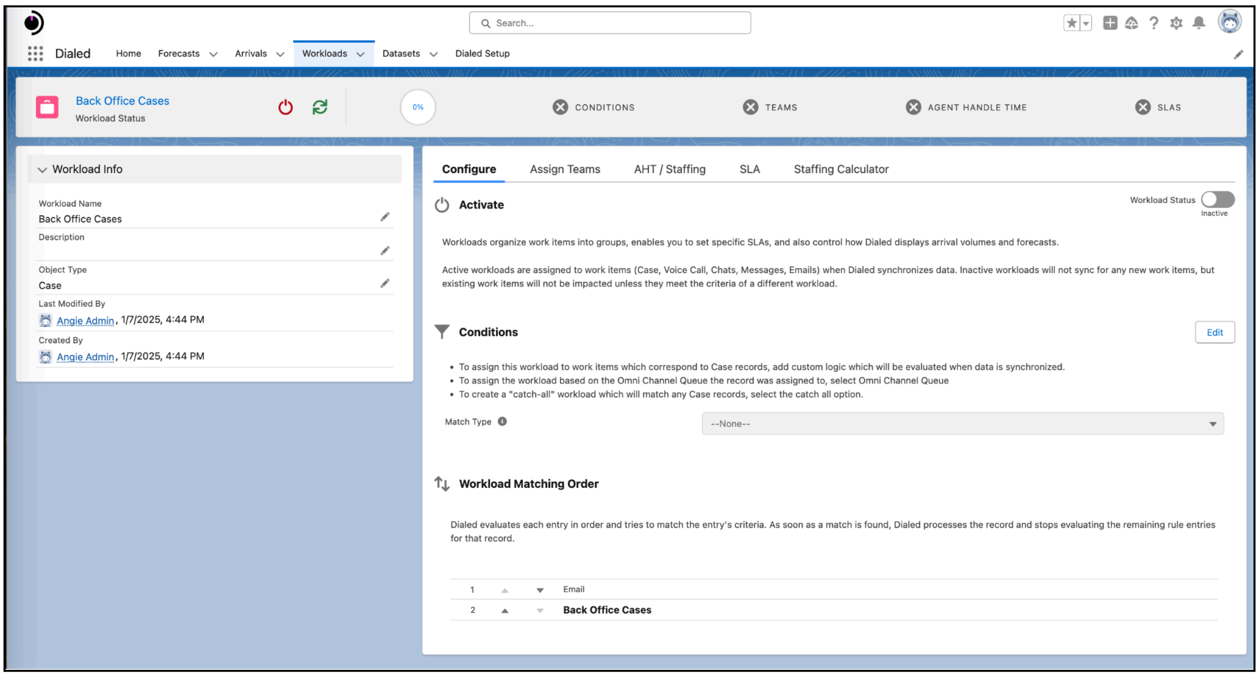
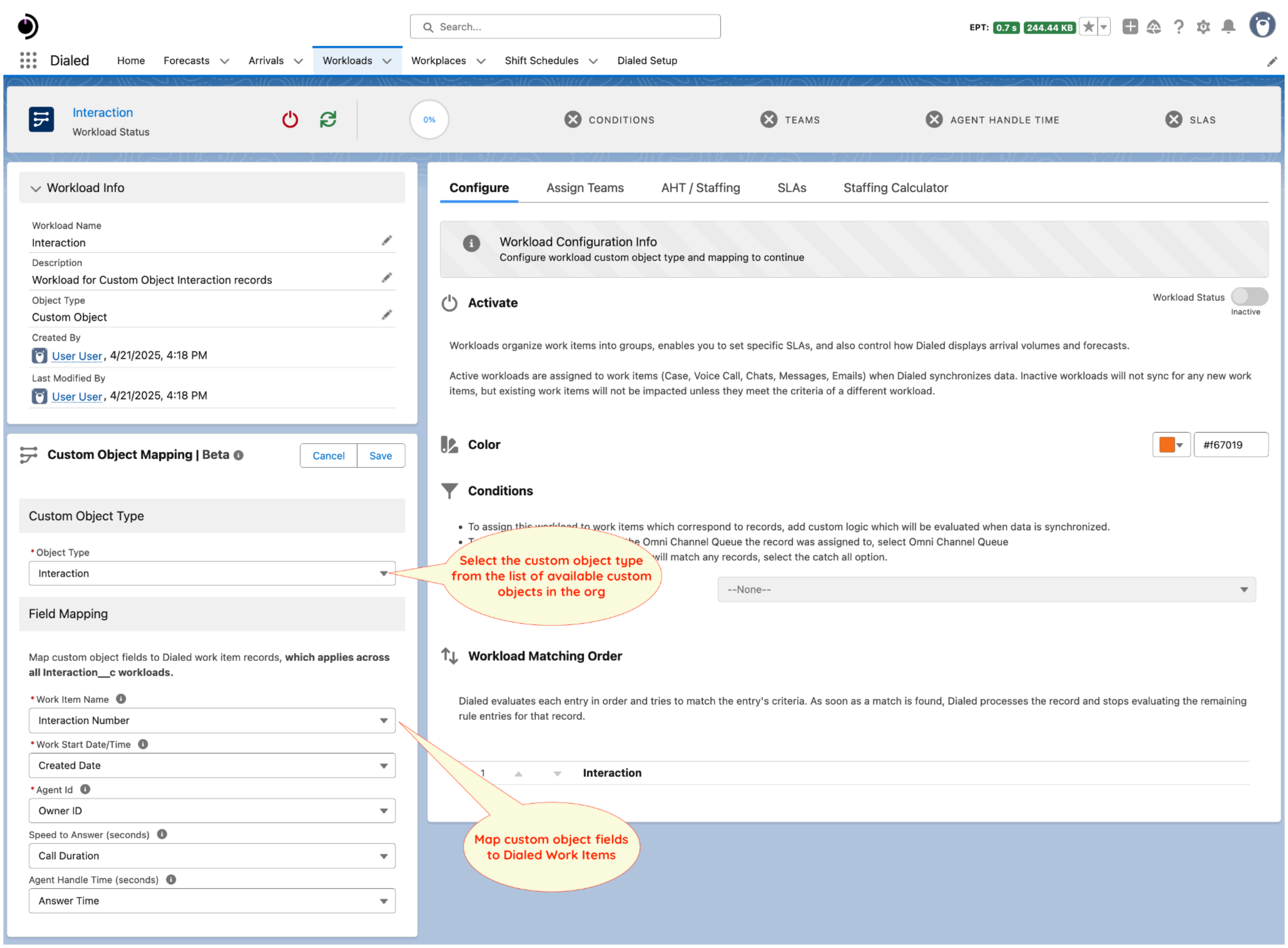


Figure 2 - Workforce Configurations

2.2.1 Custom Object Workloads

To create and configure a workload for a custom object, select “Custom Object” in the Object Type dropdown. After saving the new workload:

- Select the custom object type from the Object Type dropdown menu
- Map the Custom Object’s fields to Dialed Work Item fields
- The custom object mapping will apply to all workloads created for this object, and will be pre-populated for any new workloads created for the same object type



2.3 Configure a Workload

For a given object like Case, you might want to filter what types of Cases make up a particular Workload. Once you have created your Workload, navigate to the Workload record and open the **Configure** tab. Under **Conditions**, click **Edit**. This will allow you to create logic by which to determine what constitutes your Workload. Add a filter condition using one of the following types of match types:

a) **Custom Logic:** this will allow you to filter the object records by standard or custom fields on the Case record.
b) **Omni Channel Queue**: this will allow you to filter the object records by the queue in which this work arrived from. (Note: this only applies to records routed via Omni-Channel queue routing configurations)
c) **Catch All**: a catch all filter for any records that did not match any other filter criteria.

Dialed will show you Workload matching order from other configured Workloads configured for that Object so that you have an easy way to see other workloads that might conflict with the one you are configuring.

Dialed evaluates each workload in the order specified and tries to match the criteria. As soon as a match is found, Dialed processes the record and stops evaluating the remaining workflows for that record.

2.4 Assign Teams

Next up, you will need to add your team that will be working on this Workload. Navigate to the **Assign Teams** tab in the Workload record and click **Edit**. Dialed will help you organize the teams that will be assigned to work on this workload by selecting a Queue, a Public Group, Role, or Role and Subordinates. Select the grouping of users that works best for you and click **Save.**

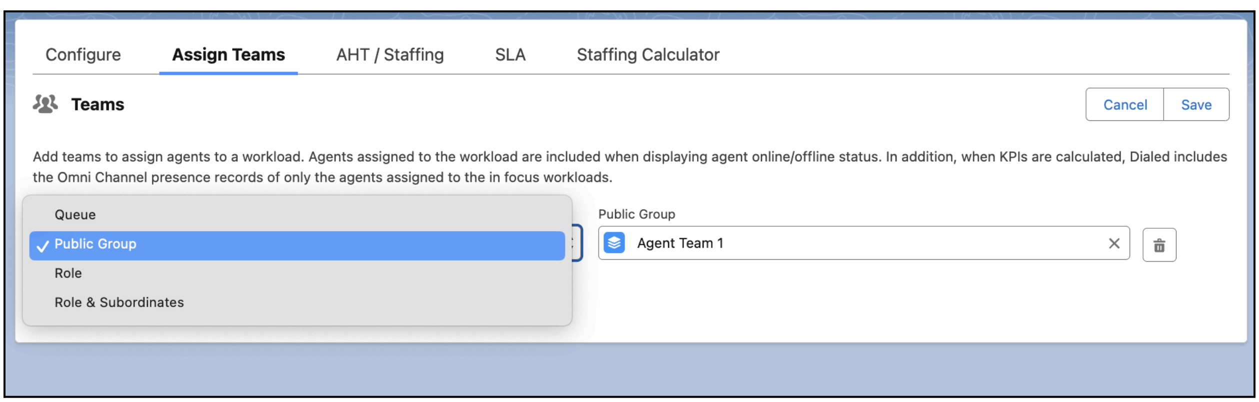


Figure 3: Assign Teams to a Workload

2.5 AHT/Staffing

An important part of understanding how to staff or forecast Workloads is understanding the effort it takes to handle an individual work item. Dialed will help you set a default Average Handle Time (AHT) value for a given Workload in seconds, but the real power comes from letting Dialed calculate AHT dynamically as your team uses Dialed. Dialed offers three approaches for dynamically calculating AHT.

a) **Omni Average Handle Time:** if the channel is routed through Salesforce Omni Channel, you can use Omni's calculation of handle time to track the agent handle time for that channel.

   Handle Time: *The amount of time an agent had the work item open, calculated by CloseDateTime – AcceptedDateTime. Handle time stops when the agent closes the work item or the after conversation work time ends, whichever happens first.*

b) **Omni Average Active Time:** if the channel is routed through Salesforce Omni Channel, you can use Omni's calculator of active time to track the agent active time for that channel.

   Active Time: *The amount of time an agent is actively working on a work item in their console. Active time is tracked only for tasks routed using the tab-based capacity model. It's tracked only when the work tab is open and in focus. If the agent switches tabs, the time spent on the other tabs isn't counted. Active time stops when the agent closes the work item or the after conversation work time ends, whichever happens first.*

c) **Dialed Average Focus Time:** Dialed also offers a proprietary way of capturing handle time. This feature tracks the duration of time a console app tab is open and in focus for any record, which can be especially useful for long running case-based work like back office or email based work, or work which is not routed via omni channel. Additional details can be found in the subsequent section titled "Manage Dialed Focus Tracker"

1. If your handle time is predictable and does not require any automatic calculation, specify a default value for AHT in Seconds.
2. If you would like Dialed to calculate handle time for you dynamically, toggle **Auto Recalc and update handle time** under **Automatic Recalibration Settings**.
3. Select a **AHT Type** to calculate handle time dynamically, outlined above.
4. Select the number of days to use from the past to calculate the AHT value.

Once data has been synchronized, Dialed will display the current AHT values when the AHT tab is loaded. Prior to synchronizing data, it will not display a value.

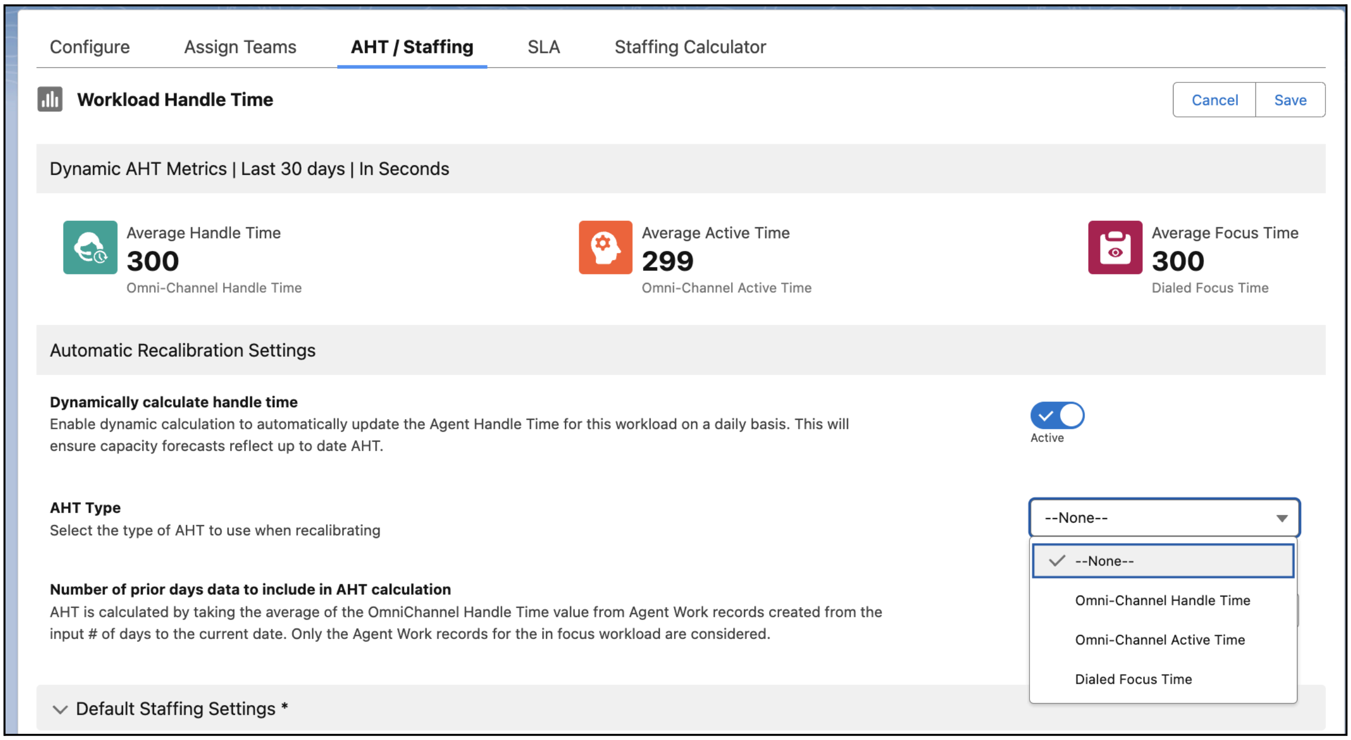


Figure 4: Configure Workload AHT/Staffing

2.6 Service Level Agreement (SLA) Configuration

Without goals, it will be difficult to measure performance. Use the SLA tab under your Workload record to configure key performance indicators (KPIs). Dialed helps you configure some common goals to help get you started.

Under the SLA tab, choose one or more of the common KPIs that Dialed offers that you would like to track for a given Workload, and input the SLA details.

2.7 Activating Workloads

Once you have configured the Workload, you can select the **Activate** toggle on the Workload record page “Configure” tab. Once all your workloads have been configured and activated, you can initiate the data synchronization process which will aggregate historical data. Continue to the “Data Synchronization” section below for details.

2.8 Data Synchronization

Once you have workloads configured, the next step is to activate Data Synchronization under the Dialed Setup tab. To optimize long term storage of large amounts of data, standard Service Cloud objects (Case, VoiceCall, ChatTranscript) are synchronized to a Big Object. This reduces the overall cost of standard data, and enables Dialed to leverage long term data independent of any archival/deletion implemented in standard objects.

Dialed only synchronizes objects which have an active workload.

Dialed setup allows you to control when its batch jobs run to aggregate your data.

Hourly Sync Job Preferred Start Time

Dialed will run a job hourly to capture any new or updated data which will be reflected in arrival data. This setting allows you to set a preference for when during the hour the job should run. It's recommended to run the job at or near the top of the hour, in order to view updated arrivals for the prior hour as soon as possible.

Daily Sync Job Preferred Start Time

Dialed will run a job daily to reevaluate historical arrival data to synchronize work items agents update throughout the day, which were created in the past. Work items will be re-evaluated against workload settings, so they can be re-aggregated as needed. This setting will allow you to pick an hour in the day to run this job. It's recommended to run this job during off peak hours.

Replicate From Date

Replicate from date is the historical date Dialed will start at when retrieving records for a full data sync, which is performed the first time data is synchronized, and when a workload is modified or created. It is recommended to leverage at least a couple years of data, but Dialed functions with a limited data set as well if you do not have data available. To avoid unnecessary data storage consumption, do not select a date older than when you began to use Service Cloud.

Log Level

Log level allows you to control the logging granularity. The recommended level is error which will create Dialed Log records when errors occur.

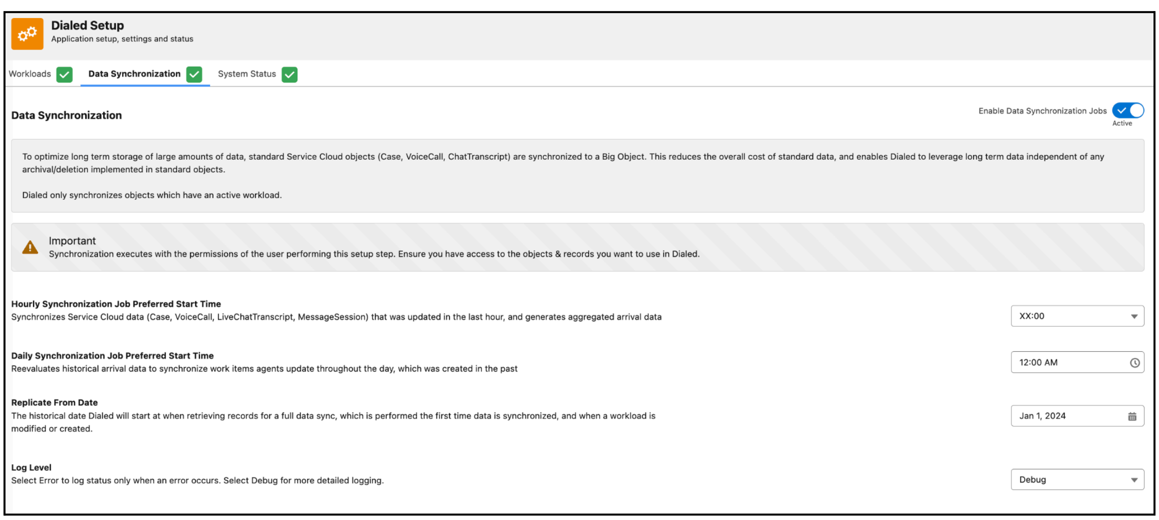


Figure 5: Data Synchronization Settings.

3. Monitor Workloads

3.1 Introduction to Monitoring Workloads

Once Workloads are created, you can monitor arrival rates of the configured workloads by navigating to the **Home** tab of the **Dialed App**. From there, you can track the arrival rates of Workloads at your preferred interval, track the performance in relation to your Workloads, or monitor the team online and their key metrics like shrink & occupancy, and track the staff required to meet any forecasts created (ref).

Let's take a look through the Dialed **Home** tab.

3.2 Monitor Arrivals

From the **Home** tab, you will be able to track the arrival rates of your Workloads over time, by day, by week or by month. You can track this work visually using the Dialed histogram, or via the arrivals by internal table right below it. By default, all activated Workloads are shown, however you can hide workloads by clicking on the chart legend.

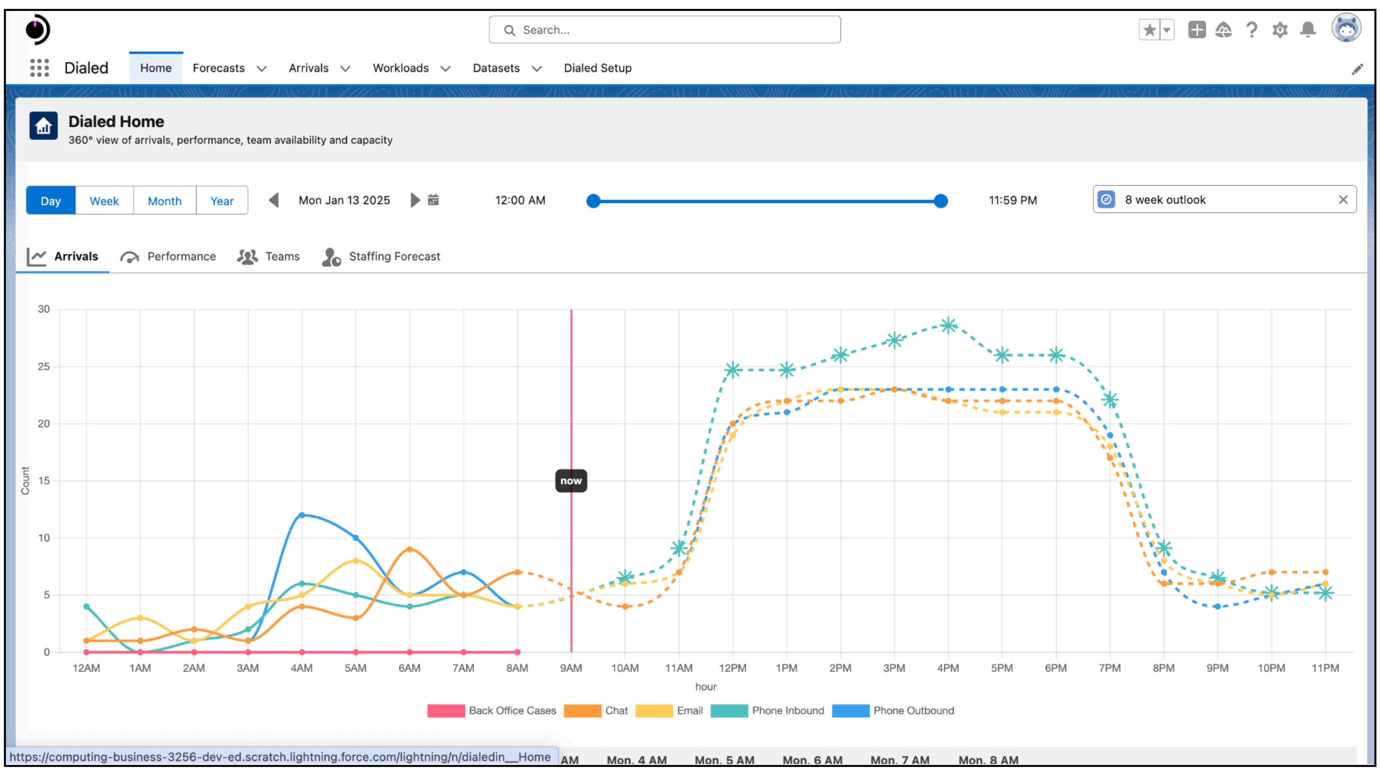


Figure 6: Dialed Home

3.3 Monitor Agentic Workforce

If your organization is leveraging Salesforce Conversational AI bots or Agentforce Agents, Dialed enables users to monitor the productivity of your agentic workforce. From the **Dialed Home**, you can track KPIs such as containment rate of virtual agents, the total number of conversations involving virtual agents, as well as the total and average handle time of conversations with virtual agents.

Dialed automatically excludes work items that were fully handled by bots from standard arrivals data. When creating forecasts, only work items which require effort from a human agent are considered.

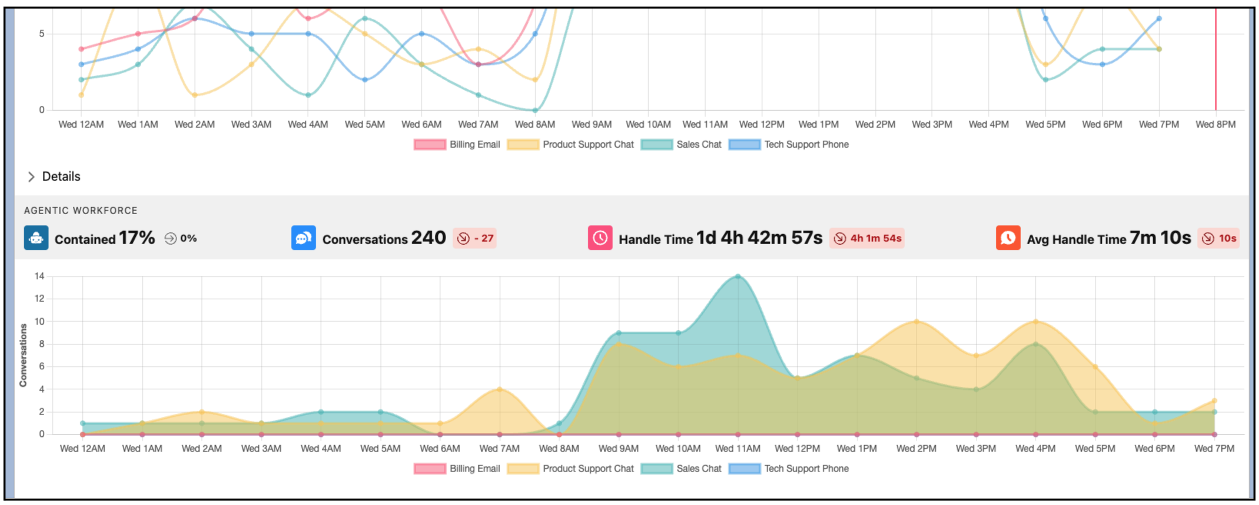


Figure 7: Monitoring Agentic Workforce

3.4 Monitor Performance

The **Performance** tab will help you track your real-time performance towards the SLAs configured by Workload. Select the Workload you would like to track and you can view the overall performance of the SLA as well as detailed violations of interactions that did not meet the SLA.

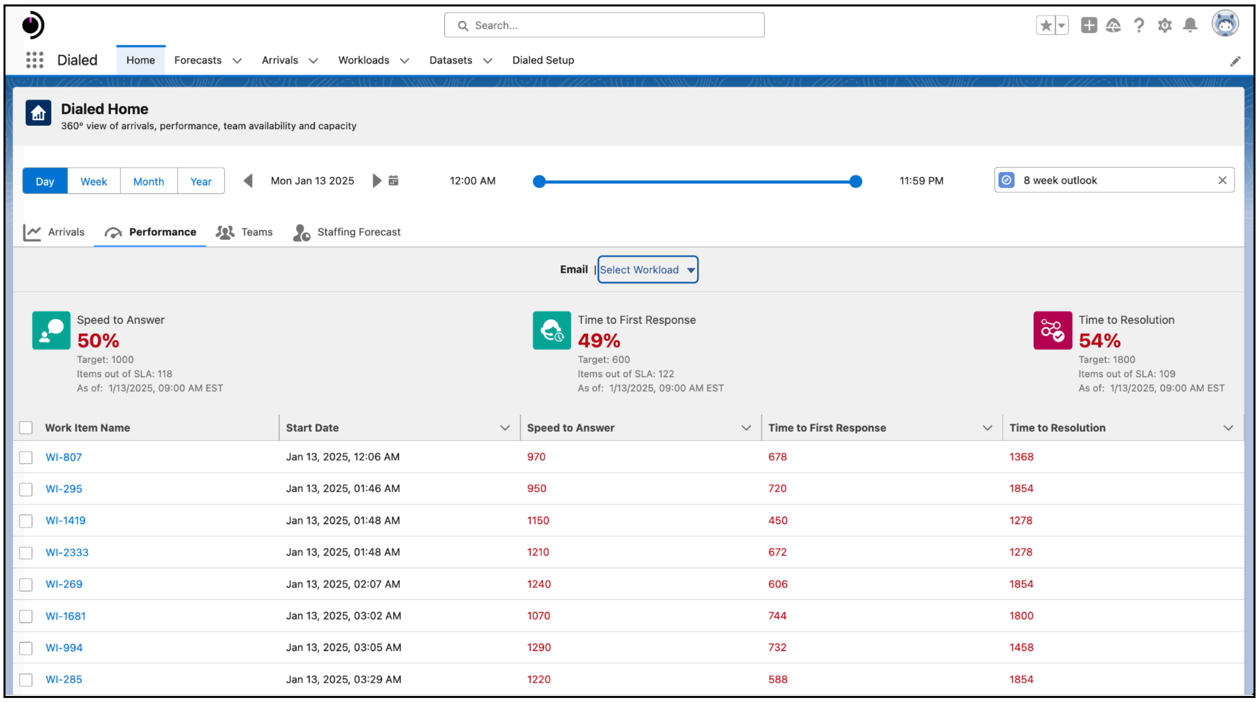


Figure 8: Dialed Performan

3.6 Monitor Staffing Forecast

The **Staffing Forecast** tab only appears if a forecast has been selected in the Dialed **Home** tab.

The **Staffing Forecast** tab will show the required staffing that is needed for a given period by Workload by interval. This can serve as a useful way to plan ahead for the FTE capacity that is required for the applied forecasted demand.

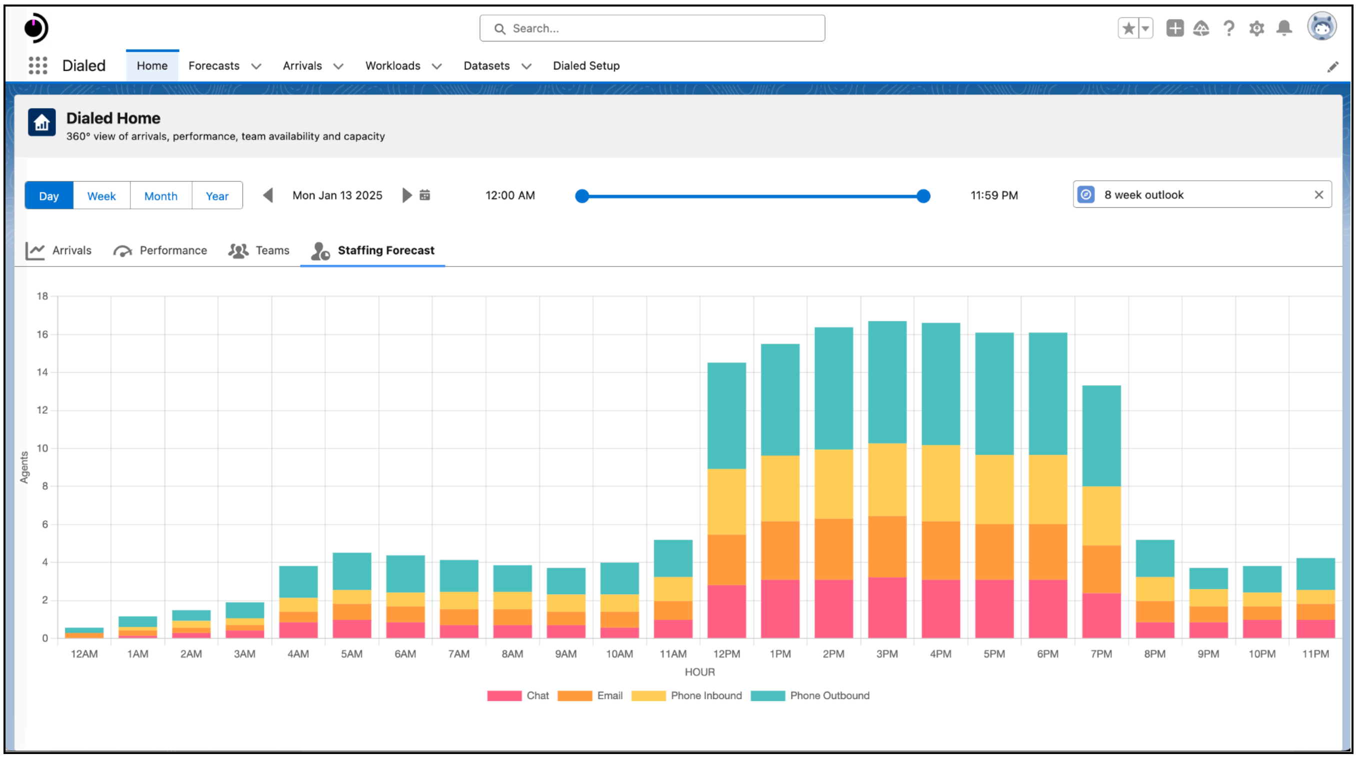


Figure 10: Dialed Staffing Forecast

4. Manage Forecasts

4.1 Introduction

One of the more powerful features of Dialed is the ability to take one or more of your Workloads and create a forecast for what future demand might look like.

4.2 Configure a Forecast

Navigate to the **Forecast** tab in the Dialed and click on **New**. From there, you can configure the Forecast that best meets your needs. Configure the basic parameters of your forecast outlined below and click **Create Forecast**.

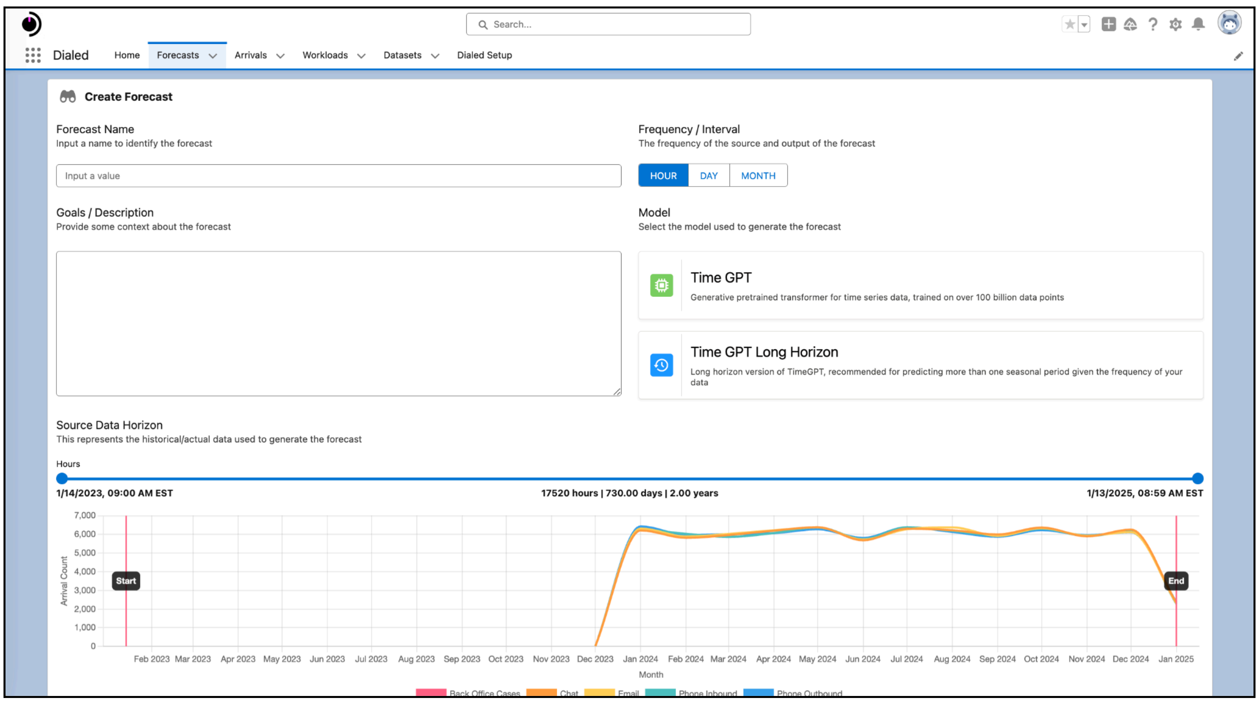


Figure 11: Configure a Forecast

Name

The name of the Forecast. It is important to give the forecast a memorable name that will make sense to you and others you might be collaborating with when drafting a Forecast.

Forecast Interval

Choose an interval with which to create this Forecast: Hour, Day or Month.

Description

The description of the Forecast. It's also important to provide as much detail on this forecast for others that might be reviewing or giving input into the Forecast.

Model

The model to use when generating the forecast.

Source Data

The lookback of data to base the forecast off of. A chart of historical workload data is provided for reference.

Forecast Horizon

The length of the forecast into the future.

Workloads

The active Workloads to configure in the Forecast.

4.3 Adjust a Forecast

Once created, you will have the opportunity to adjust your forecast to account for anticipated changes to your demand. To add adjustments to a given Forecast, open up the Forecast record and view the histogram of future arrival rates. Right below the graph, you will notice a table of data that makes up the Forecast. To amend any of the data points, you can single select or mass select rows of data points and adjust each row by an absolute value or by a percentage +/-.

Once you are happy with your amendments, add a required annotation so that others have context on what your change relates to.

4.4 Apply a Forecast

Once you are satisfied with the forecast that has been drafted, navigate back to the Dialed **Home** tab, select the **Arrivals** tab and apply a forecast by using the Forecast look up on the top right hand corner. Once complete, you will now see both historical arrivals of your workloads as well as forecasted future demand side by side.

5. Configure Dialed Focus Tracker

5.1 Introduction

Measuring the handle time of offline or async work, such as email-2-case or web-2-case using the out-of-box Omni Channel Agent Work data may not capture the total effort, because it only captures handle time when the record is pushed to an agent. If an agent closes a work item, and returns to it later, the effort is not captured with Omni.

Dialed offers a console component that comprehensively tracks the time agents have record tabs (i.e. cases) open and in focus, to provide a more accurate measurement of the time it takes to resolve a work item. Let's walk through the setup and the output you can expect when using Dialed Focus Tracker.

Focus Tracker is a managed Aura component called **FocusTracker** that requires admins to add the component to Lightning Console Apps as Utility Items.

Focus Tracker runs in the background and records activity to a Big Object called **Work Focus**. Dialed uses this object to track and aggregate values captured, but you can also query and export data from this big object for your own data analysis.

Only activity for users who have been assigned the Dialed license will be considered by **Focus Tracker**.

5.2 Add **Focus Tracker** to your Lightning Apps

- **Navigate to Salesforce Setup > Apps > App Manager**.
- Locate the console lightning app used by Agents,
  i.e. Service Cloud Console and click **Edit**.
- Under **Utility Items (Desktop Only)**, click **Add Utility Item**.
- Add the Custom component called **FocusTracker.**
- Click **Save**.

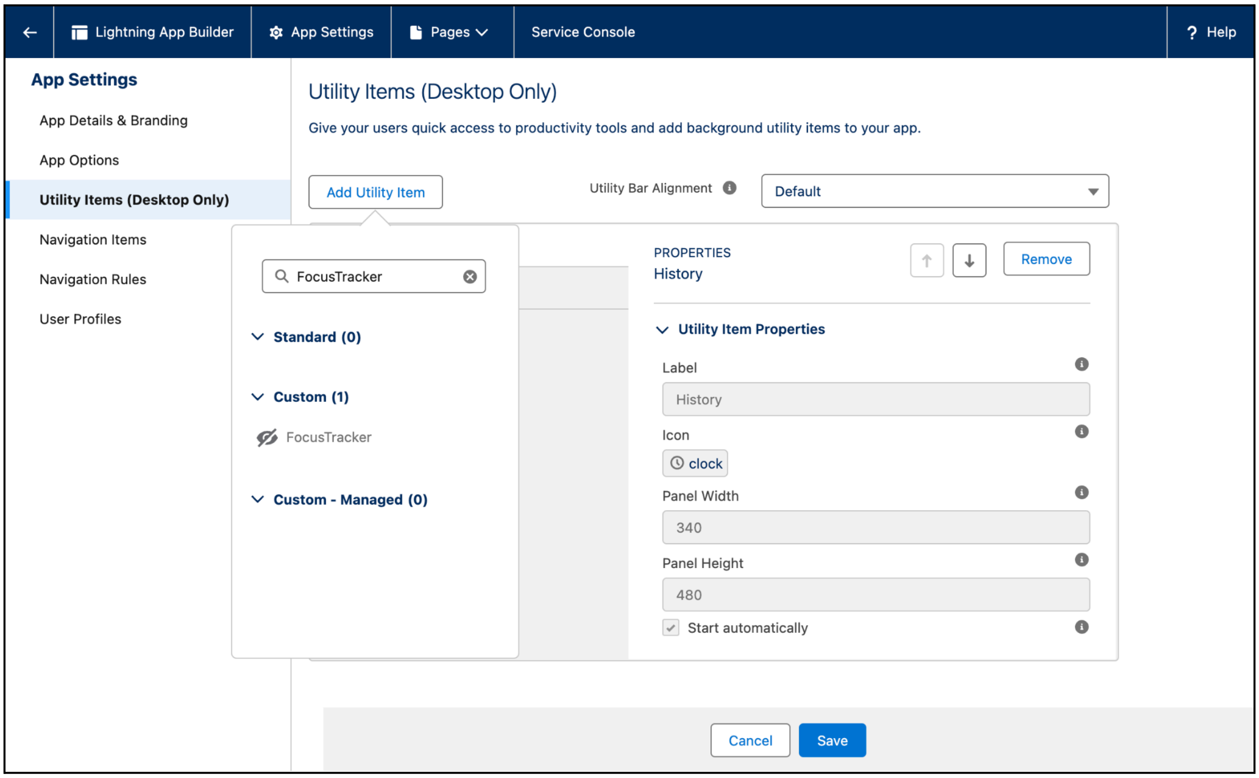


Figure 12 - Add FocusTracker Console Utility Item

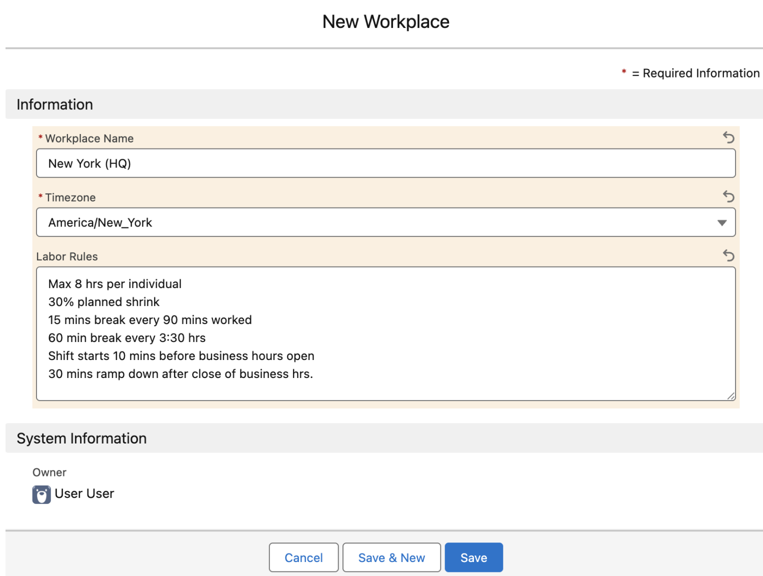
6. Shift Scheduling

Dialed can generate agent shift schedules using configurable templates which set working hours, breaks & workload priority. Schedules can then be edited using a drag & drop UI for on the fly updates. Dialed can also synchronize schedules with Google and Outlook calendars via Einstein Activity Capture (included in Performance & Unlimited edition)

This section will help you get started creating shift schedules.

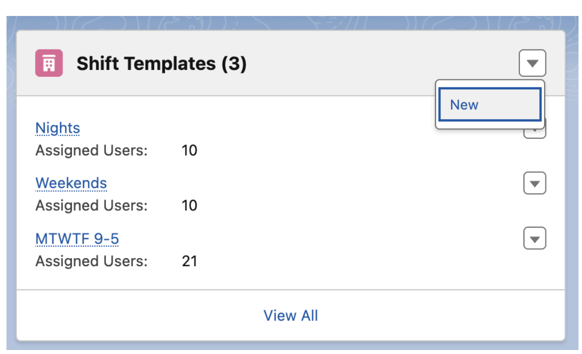
6.1 Workplaces

Start by creating a workplace, which will be used to associate shift templates and assign agents. Input the name, time zone where the workplace is located, any any labor rules that might be useful to understand when later creating shift templates:



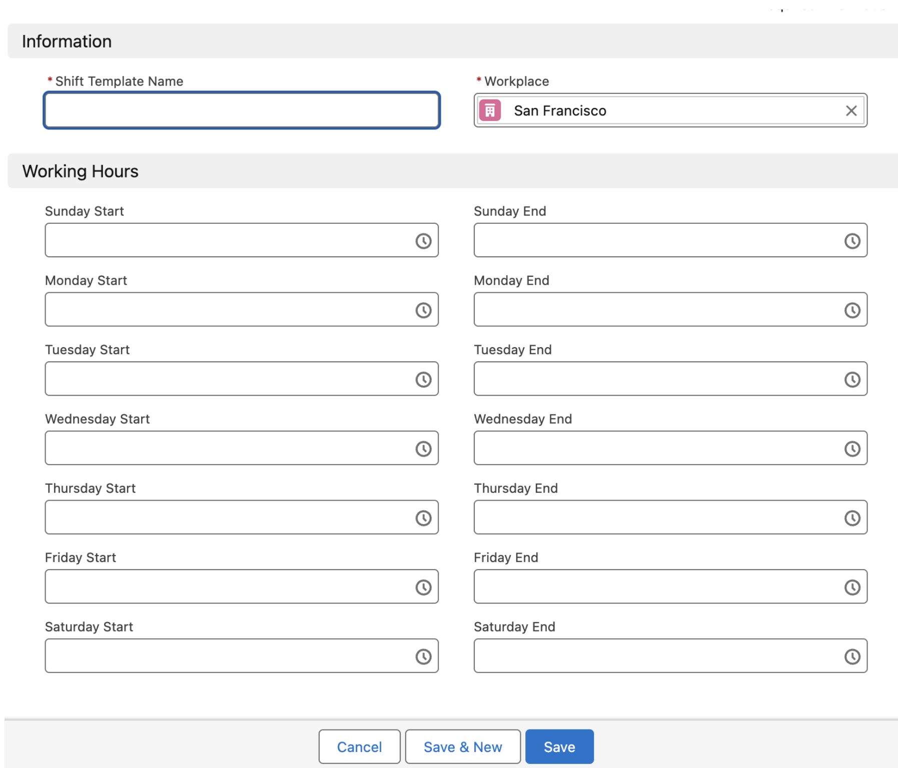
6.2 Shift Templates

Shift templates control when agents at a workplace can be scheduled to work, when they can take breaks, and what kind of work should be prioritized. To get started, navigate to a workplace, and click new from the dropdown menu within the “Shift Templates” list.



Working Hours

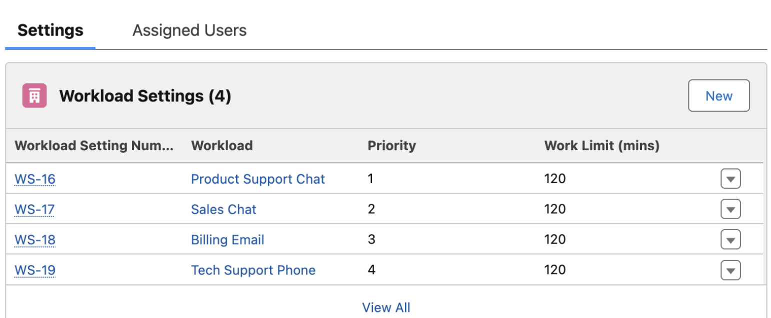
Configure working hours, which will be based on the time zone configured on the parent workplace, and tell the schedule when a shift can start and end on each day of the week. To schedule an “overnight shift”, set the end time to a value that is earlier than the start time, i.e. 9:00 PM to 4:00 AM.



Workload Settings

Workload settings enable you to define the maximum amount of time an agent should work on a single workload in a shift, as well as prioritize what workloads should be staffed in the event of understaffing at any given time. For example, if the forecast at 1PM requires 5 agents for “Billing” calls and 5 agents for “Tech Support”, but only 8 are available to be staffed, the workload with the higher priority will be full staffed at 5 agents, and the lower priority will be under-staffed with 3 agents

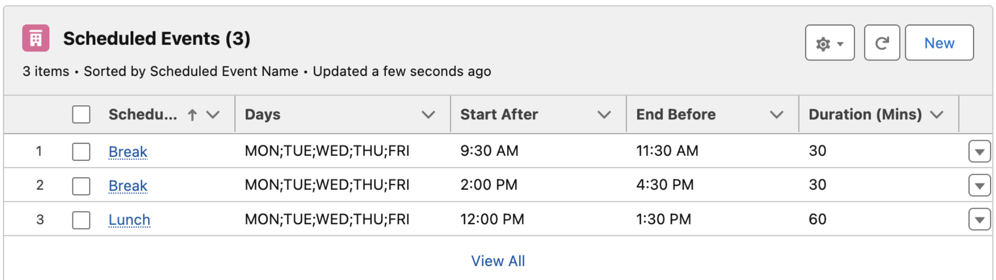
Click “New” on the workload settings list to configure settings:



Scheduled Events

Scheduled events structure the shift so you can define windows of time that breaks can be taken, and when any required workload time should be scheduled, regardless of the forecast. For example, if there is a backlog of cases and agents should be scheduled to work on them for an hour each day, define it in a scheduled event.

Click “New” on the scheduled events list to create an event. The scheduler will automatically schedule the event within the configured window (Start and End dates), for the defined amount of time, at an optimal time based on workload demand and coverage:



Scheduled Events (3)

3 items • Sorted by Scheduled Event Name • Updated a few seconds ago

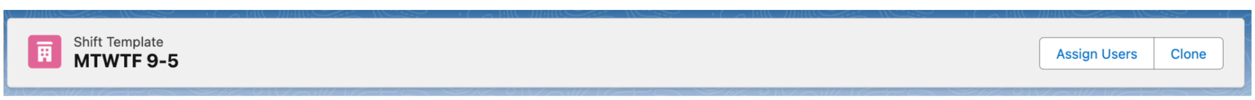
New

	Schedu...	Days	Start After	End Before	Duration (Mins)
1	Break	MON;TUE;WED;THU;FRI	9:30 AM	11:30 AM	30
2	Break	MON;TUE;WED;THU;FRI	2:00 PM	4:30 PM	30
3	Lunch	MON;TUE;WED;THU;FRI	12:00 PM	1:30 PM	60

View All

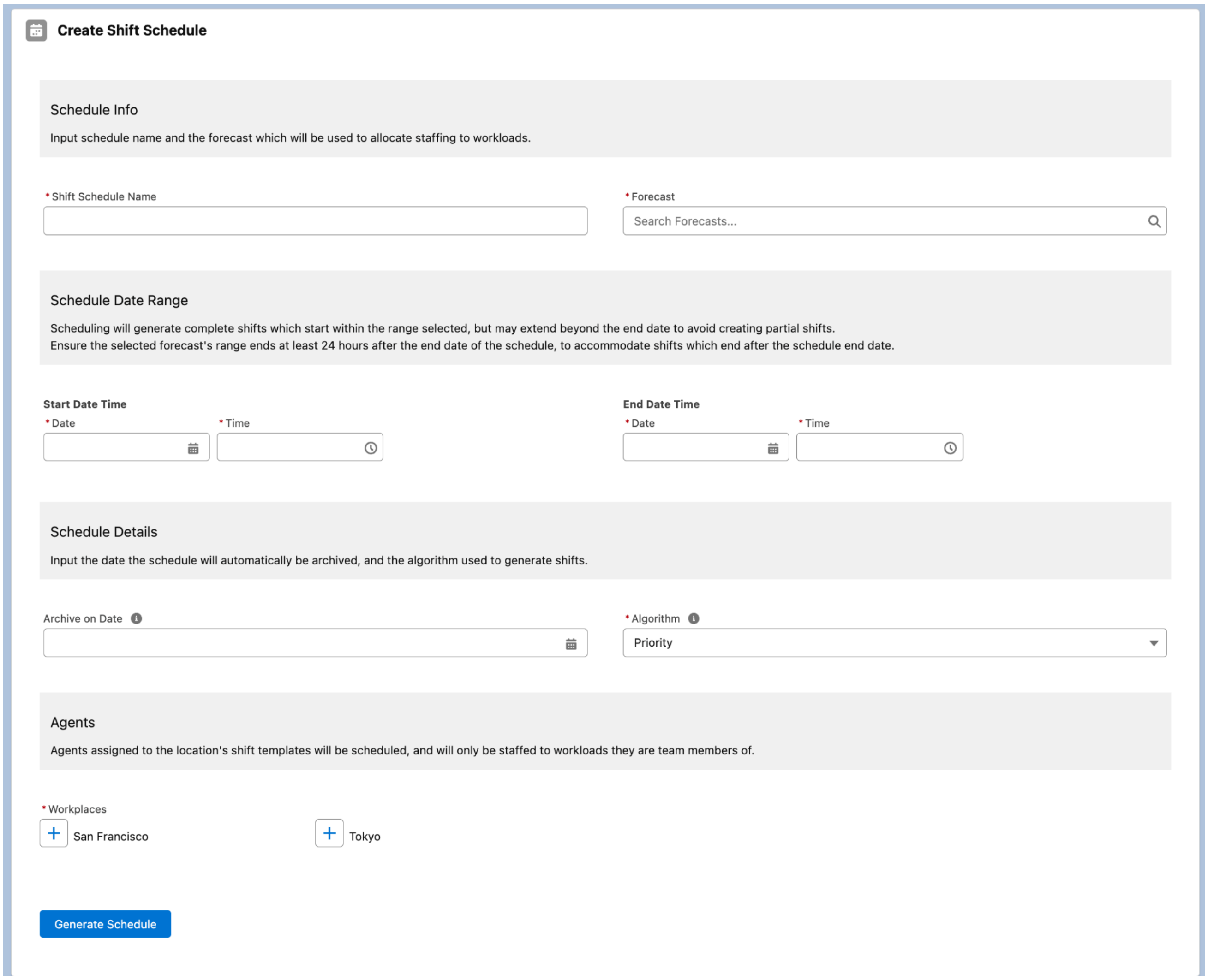
Assign Agents

Assign agents to Shift Templates by clicking “Assign Users” in the template header:



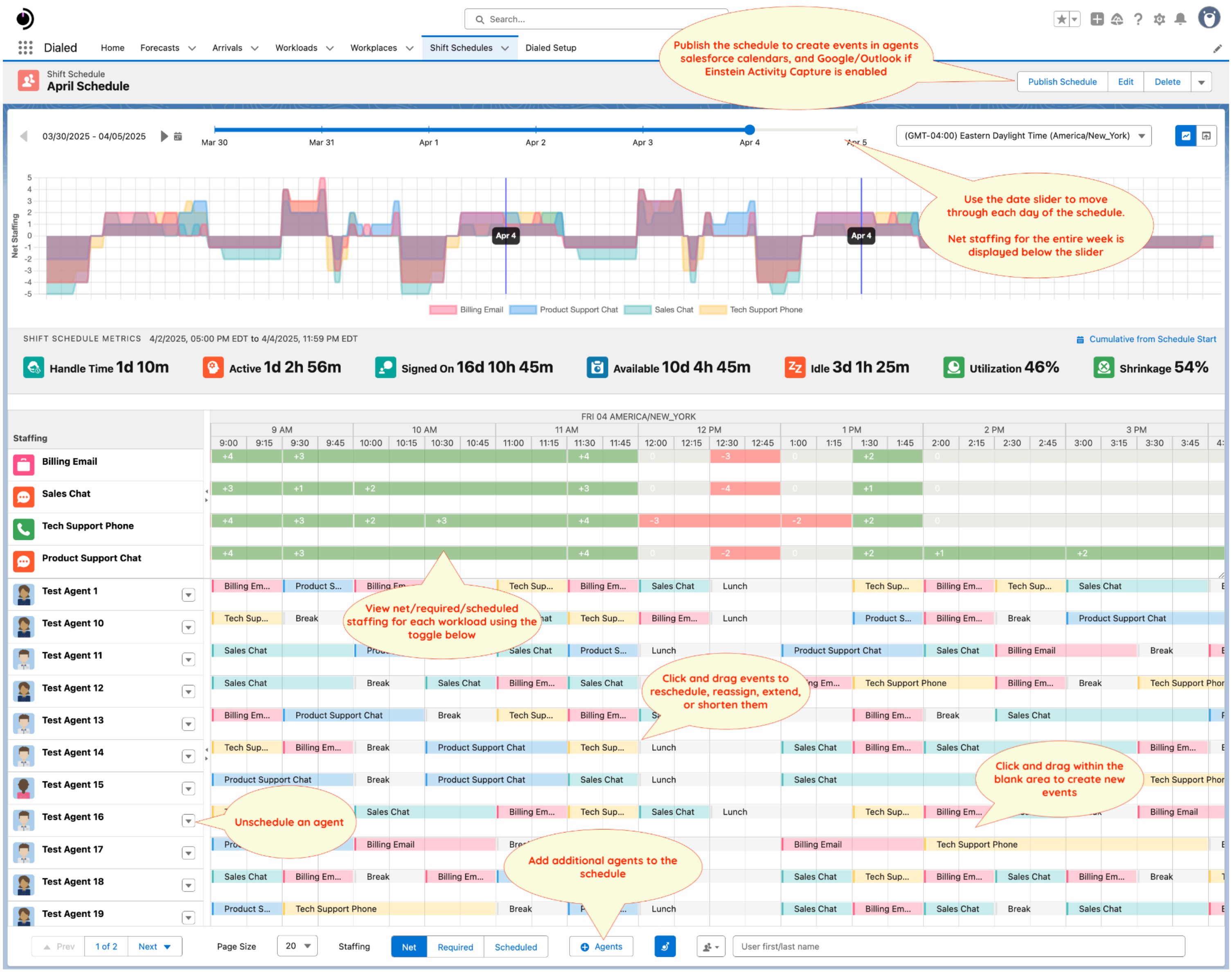
6.3 Generate & Publish Schedules

After configuring Workplaces, Shift Templates and assigning agents, you can generate a shift schedule from a Forecast. Start by clicking “New” from the “Shift Schedules” tab in Dialed, which will open the following page:



The schedule will be generated automatically based on the staffing demand in the selected forecast, and will create a draft shift schedule for agents assigned to Shift Templates associated with the selected locations. Agents will only be scheduled to work on Workloads they are assigned to. (see Assign Teams)

At this point you can make any manual updates and agent additions/removals, prior to publishing the schedule. Agents will not have visibility to the shift events until published.



When ready, click "Publish" to schedule standard Salesforce Event records within the Salesforce calendar for agents. See below section [Google/Outlook Calendar Sync] to synchronize events.

6.4 Shift Schedule Metrics

KPIs are displayed within **published schedules only**, and are calculated as follow:

KPI	Requires	Description
Handle Time	Omni Channel Routing	Total handle time for all Omni Channel Agent Work records, which tracks the time the work item was open, CloseDateTime - AcceptedDateTime, and stops when the agent closes the work item or the after conversation work time ends. Includes total duration of all Agent Work records accepted within the selected date range.
Active Time	Omni Channel Routing	Total active time for Agent Work records, tracked for items routed with tab-based capacity model when actively working a work item tab. Includes total duration of all Agent Work records accepted within the selected date range.
Sign On Time	Omni Channel Presence	Total time agents are signed on (Omni UserServicePresence StatusDuration). Includes total duration of all records which start within the selected date range.
Available Time	Omni Channel User Presence	Total duration agents are signed on and available (Omni UserServicePresence status not 'IsAway'). Includes total duration of all records which start within the selected date range.
Idle Time	Omni Channel User Presence	Total time agents are in an available state but waiting for work to arrive (Omni UserServicePresence IdleDuration). Includes total duration of all records which start within the selected date range.
Utilization	Omni Channel User Presence	Percentage of shift time agents spend logged-in, handling and expecting contacts. (Available Time / Total Shift Time) Shift time includes the total duration of all shift events which start within the selected date range.
Shrinkage	Omni Channel User Presence	Percentage of time agents spend signed on but not in a state helping customers (100% - Utilization)

6.5 Google/Outlook Calendar Sync

To synchronize Dialed with agents Google or Outlook calendars, setup Einstein Activity Capture, which is a Salesforce feature included with some editions of Salesforce, or available with an add-on license.

Calendars can be synchronized bi-directionally, so when scheduling agents, schedulers have visibility to any already scheduled events on agents calendars, and agents will have visibility to the shift schedules on their own calendars once a schedule is published.

To setup Einstein Activity Capture, follow the steps in the Salesforce user guide:
Einstein Activity Capture Setup

Dialed only needs the “Events” feature of activity capture. Email & Contacts sync is not required.

7. Data Footprint

7.1 Big Object Storage

Only aggregate data is stored in standard objects. Raw data is stored in Big Objects, which provide scalable, cost efficient storage for huge data volumes. 1 Work Item record is created for each corresponding Case, Voice Call, Chat which is matched to a workload, and 1 Work Focus record is created each time a Dialed licensed agent interacts/views a record. (No sensitive data is synchronized to Big Objects, such as case description or subject)

Enterprise, Performance, Unlimited, and Developer editions are allocated storage for 1 million Big Object records. Contact Salesforce to increase the limit.

7.2 Standard Object Storage

Workload Arrivals Data

17.5 MB per workload per year of data

For each workload configured, data is aggregated into hours. 1 year equates to 8,760 hours, stored as Datapoint records. Each record consumes 2KB of standard data storage allocation, equivalent to 17,520KB, or 17.5 MB. Configure how many years of data are used with the **Replicate From Date** setting in Dialed Setup.

Shift Schedules

Storage usage for a schedule varies based on the number of agents scheduled, and the number of active workloads included in the forecast. For example, a 14 day schedule for 100 agents and 10 workloads uses about 50 MB of storage allocation, assuming about 8 shift events per day.

To manage the data footprint Dialed schedules consume, **automatic shift schedule archiving takes place after the schedule end date has passed**. The exact archive date is configured when generating the schedule.

SFDC Storage Allocation

In general, SFDC allocates 10GB per org + 200MB per user license. Please see additional details in the Salesforce.com “Data and Storage Resources” documentation.