

Digital Engagement Dashboards

The purpose of this package is to allow Digital Engagement customers to track the performance and usage of the Digital Channels.

TO INSTALL THIS DASHBOARD YOU MUST HAVE OMNI CHANNEL, CHAT AND MESSAGING ENABLED - THEREFORE YOU MUST OWN A DIGITAL ENGAGEMENT LICENSE. YOU CAN ENABLE BOTH OF THESE FROM THE SETUP SCREENS ('OMNI-CHANNEL SETTINGS', 'CHAT SETTINGS' AND 'MESSAGING SETTINGS'). THE PACKAGE WILL NOT INSTALL IF THESE ARE NOT ENABLED.

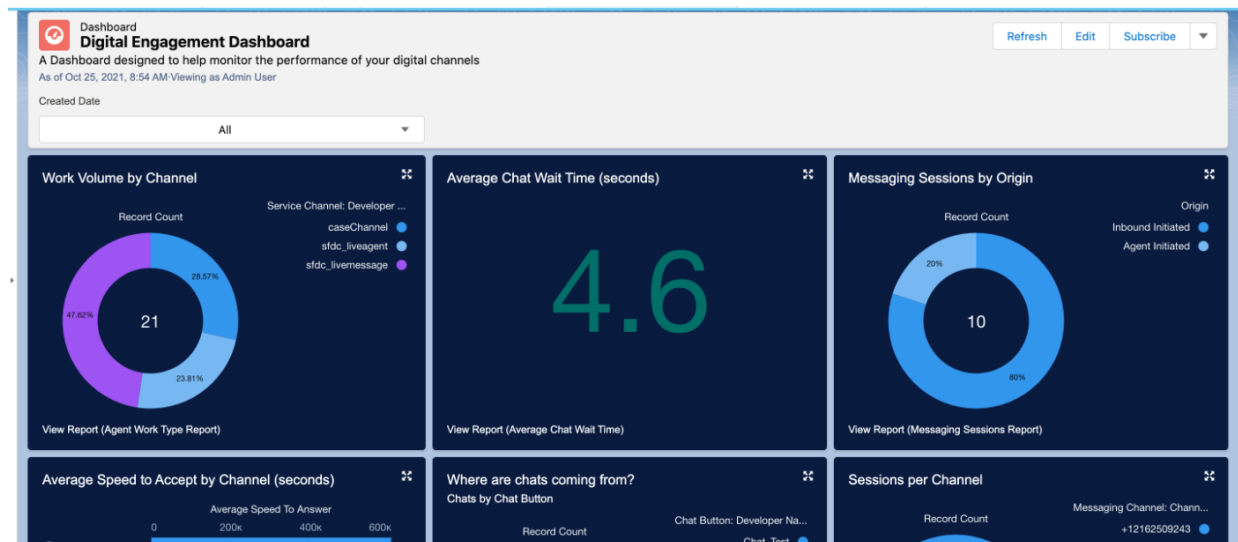
AppExchange Install Link

Check out the Outline/Contents to the right to jump to the relevant Dashboard or Report [→](#)

Disclaimer - these reports are not officially supported by Salesforce and may not match your actual recorded usage - they should be used as a guide only.

Digital Engagement Dashboard

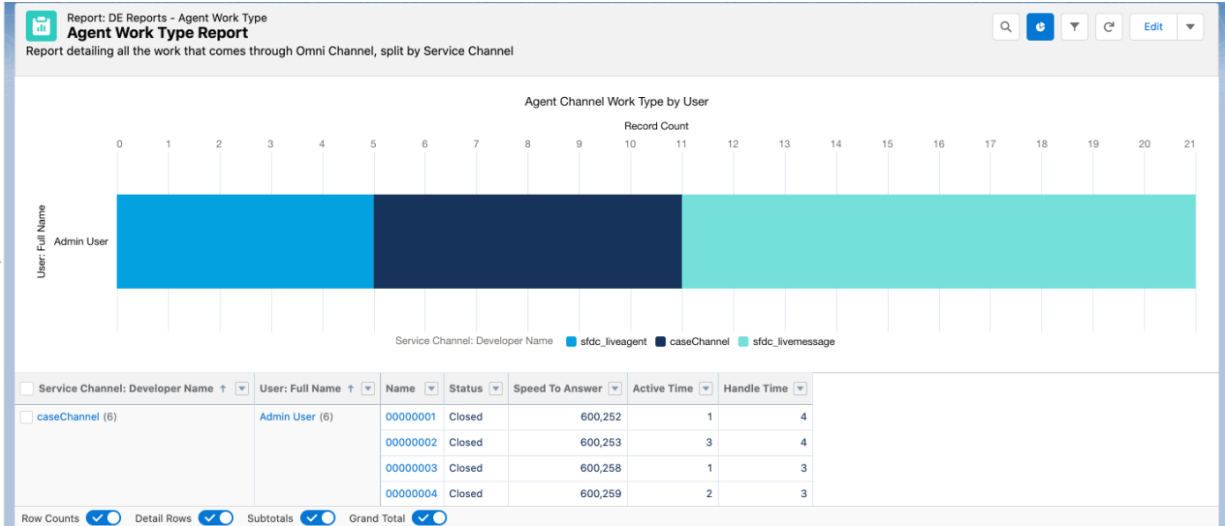
Here is a quick view of the dashboard, more details of each report are below



AGENT WORK TYPE REPORT

This report uses Omni-Channel data to pull in all the work that agents have accepted in Omni-Channel, and split it by Service Channel. This is used for 4 of the widgets on the Dashboard.

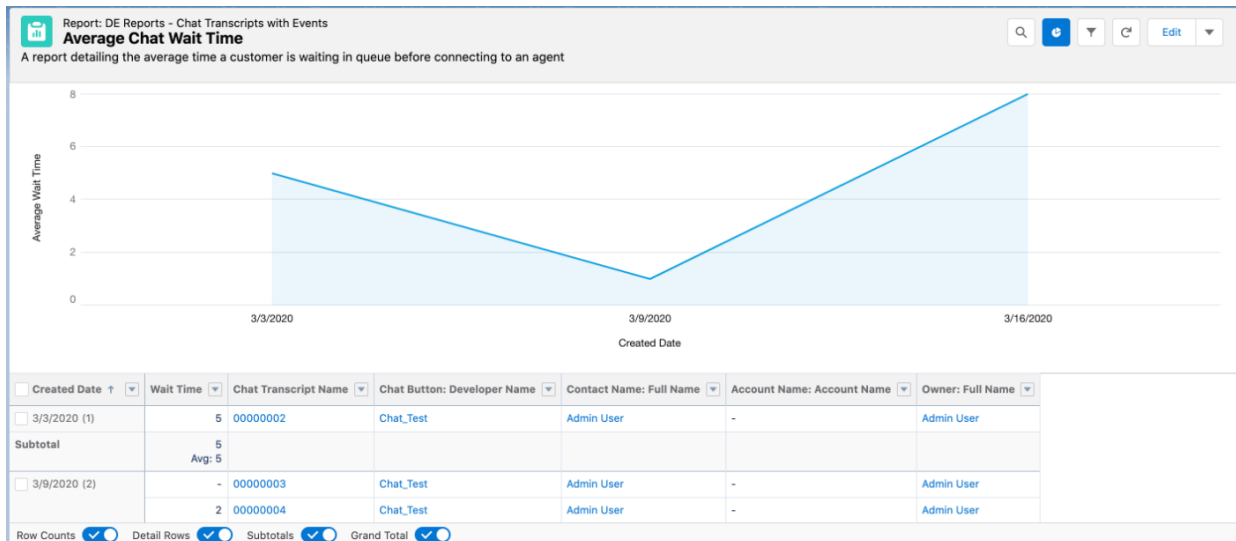
For details on the fields included in this report, check out this help article: https://help.salesforce.com/s/articleView?id=sf.omnichannel_agent_work_fields.htm&type=5



AVERAGE CHAT WAIT TIME

This report helps to identify how long customers are waiting in the queue to connect to an agent on the chat channel. Monitor this to work out peak periods or times of the day where you may need more agents covering this channel.

Note that if you are using Einstein Bots then this isn't relevant as it does not get updated for the wait time between Bot → Agent.

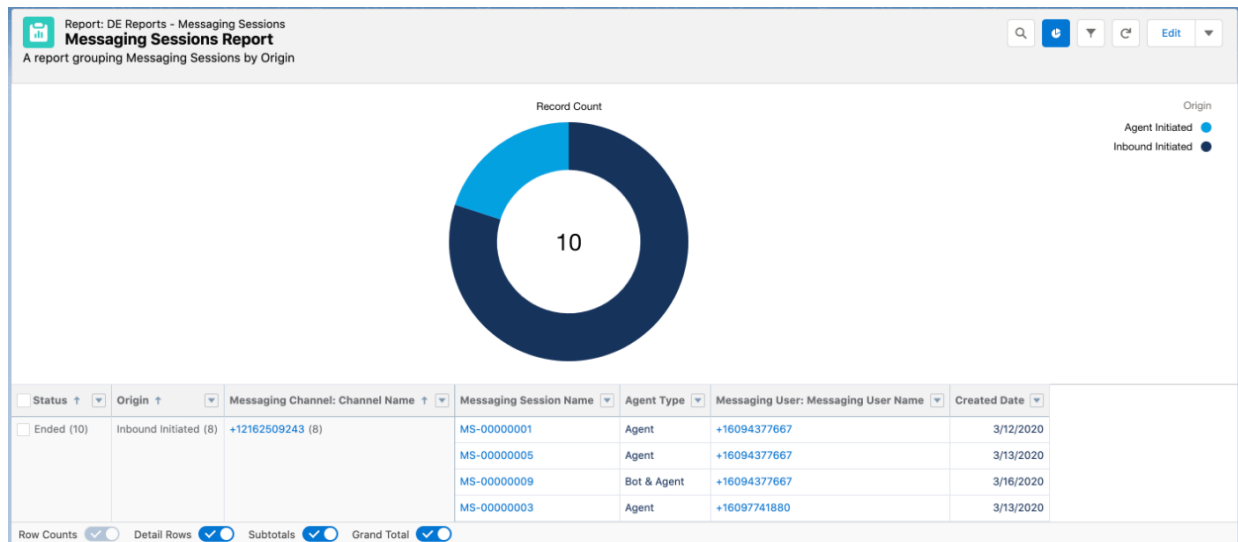


MESSAGING SESSIONS REPORT

This report is designed to split the Messaging Sessions by how they were initiated. The main 3 are:

- Inbound Initiated
- Triggered Outbound
- Agent Initiated

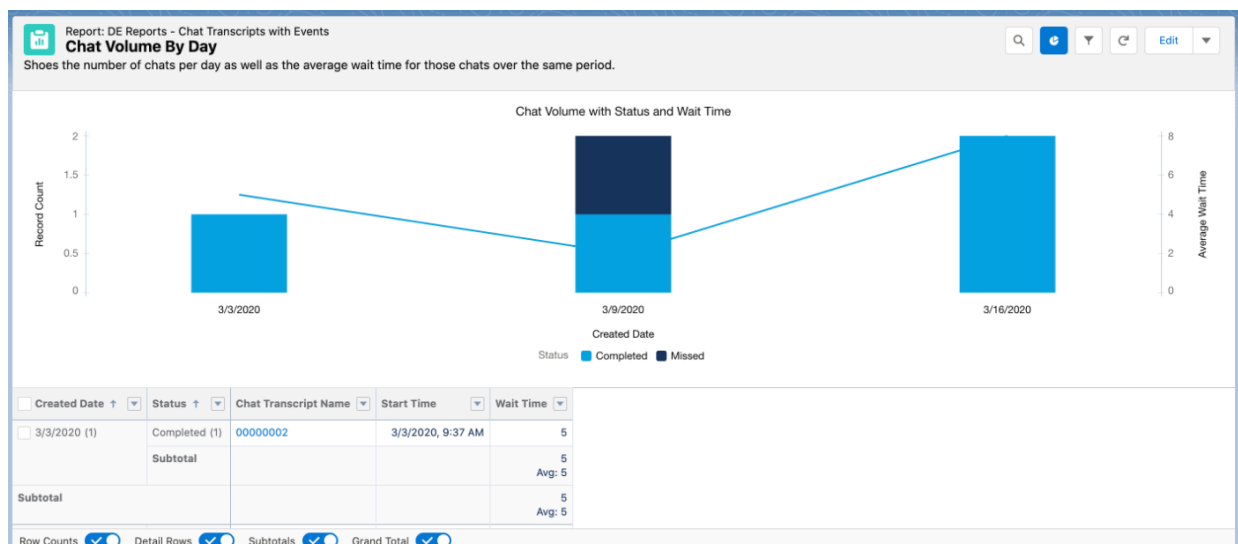
This can provide insight into your usage and how agents are using the system. For full usage reporting, check out the [Digital Engagement Usage Dashboard](#).



CHAT VOLUME BY DAY

This report is designed to help you track the number of chats you are getting per day, including those that you missed (i.e. the end customer queued, but abandoned before connecting to an agent). This will help you identify peaks and troughs of requests, and you will want to keep an eye on the abandonment rate.

This report is used for 2 of the components on the Dashboard.



CHAT NETWORK INFO

This report is designed to give you more detailed information about where your chats are coming from. It will allow you to break down your chats by browser and operating system, as well as by the Chat Button used, as setup in the admin screens.

Report: DE Reports - Chat Transcripts

Chat Network Info

A report detailing various network information about the chats that have happened, including Operating system, language and location

Total Records6

Total Abandoned After5

Chat Button: Developer Name	Created Date	Chat Transcript Name	Network	Platform	Browser	Browser Language	Location	Visitor IP Address	Abandoned
Chat_Test (6)	3/3/2020 (2)	00000001	Salesforce.com	MacOSX	Chrome 80.0.3987.106	en-US	San Francisco, CA, United States	204.14.239.17	
		00000002	Salesforce.com	MacOSX	Chrome 80.0.3987.106	en-US	San Francisco, CA, United States	204.14.239.17	
	Subtotal								
	3/9/2020 (2)	00000003	Salesforce.com	MacOSX	Chrome 80.0.3987.122	en-US	San Francisco, CA, United States	204.14.236.150	
		00000004	Salesforce.com	MacOSX	Chrome 80.0.3987.122	en-US	San Francisco, CA, United States	204.14.236.150	
	Subtotal								
3/16/2020 (2)	00000005	Salesforce.com	MacOSX	Chrome 80.0.3987.132	en-US	San Francisco, CA, United States	204.14.236.153		
	00000006	Salesforce.com	MacOSX	Chrome 80.0.3987.132	en-US	San Francisco, CA, United States	204.14.236.153		
Subtotal									
Subtotal									
Total (6)									

MESSAGING CHANNEL BREAKDOWN

This reports lets you identify the amount of traffic that each phone number, and/or Facebook page is getting in terms of messages (i.e. which is the busiest channel/number?).

Report: DE Reports - Users, Sessions and Conversations

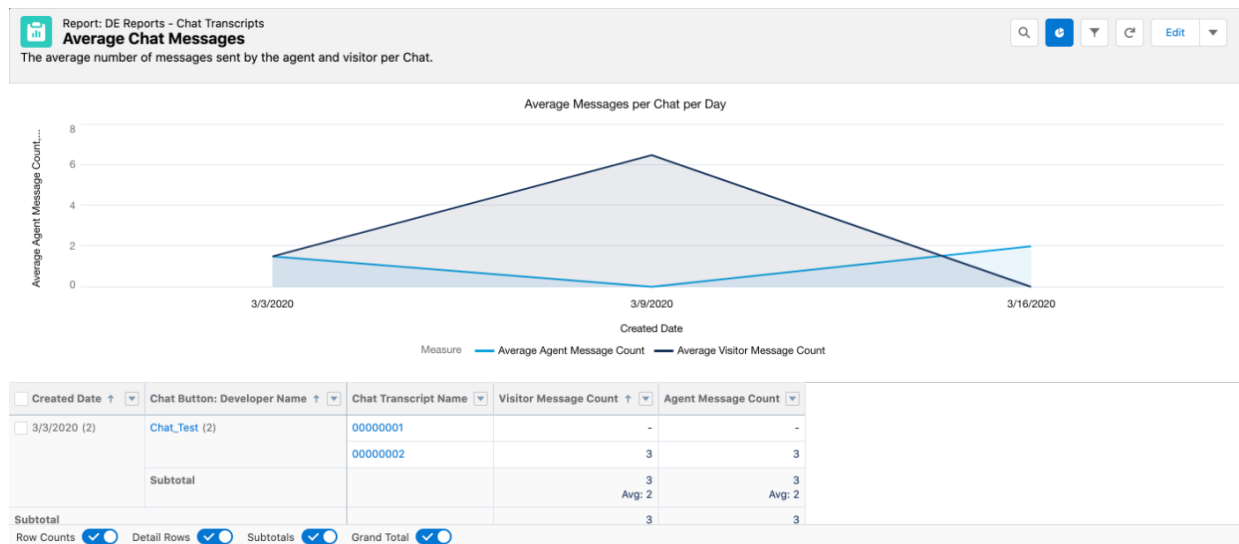
Messaging Channel Breakdown

A report breaking down the sessions by channel over time

Q

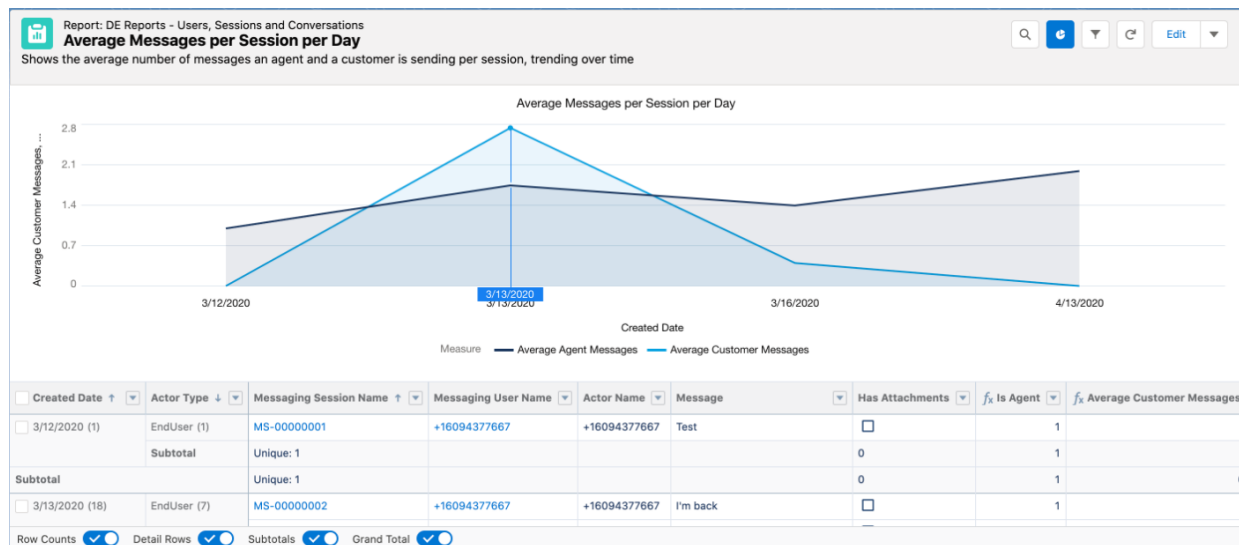
AVERAGE CHAT MESSAGES

This report shows the number of messages an agent is sending per chat, versus the number the visitor is sending in the conversation.



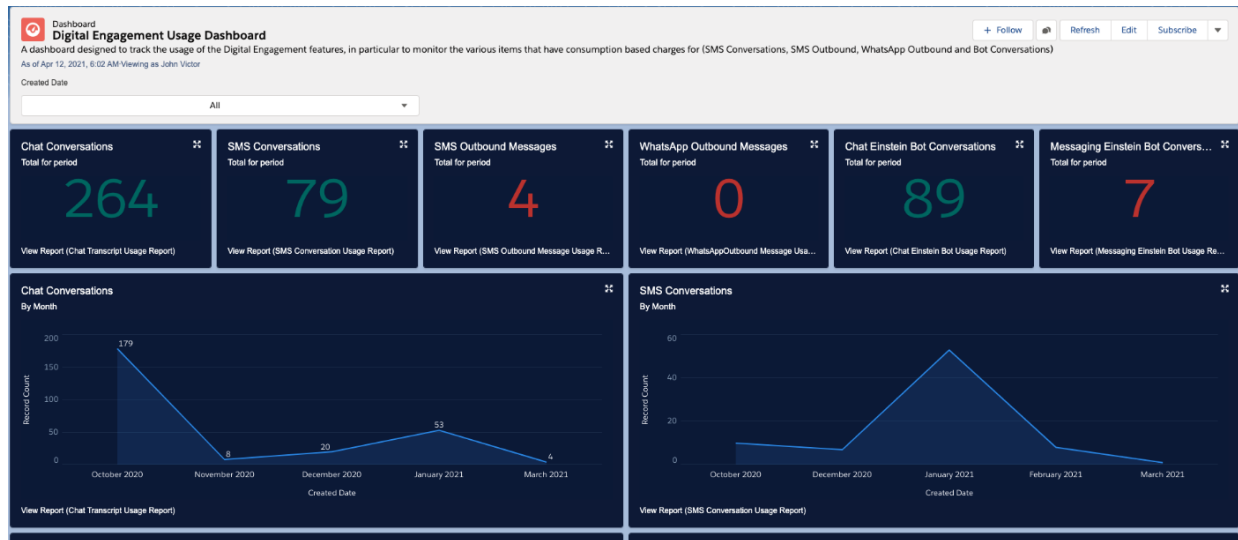
AVERAGE MESSAGES PER SESSION PER DAY

This report shows the number of messages an agent is sending per Messaging Session, versus the number the visitor is sending in the conversation.



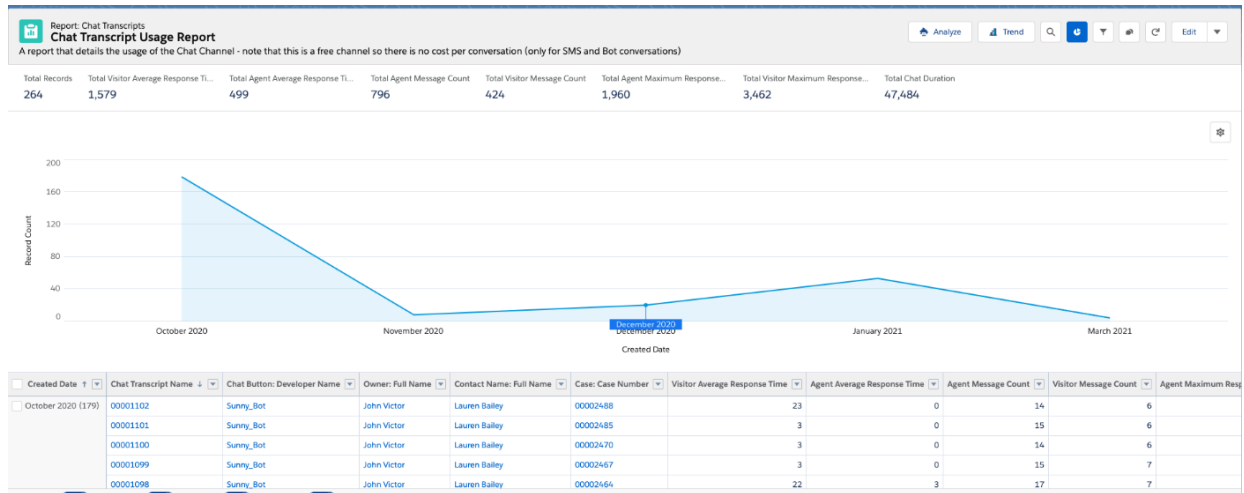
Digital Engagement Usage Dashboard

Here is a view of the dashboard - the details of each report are below



CHAT TRANSCRIPT USAGE REPORT

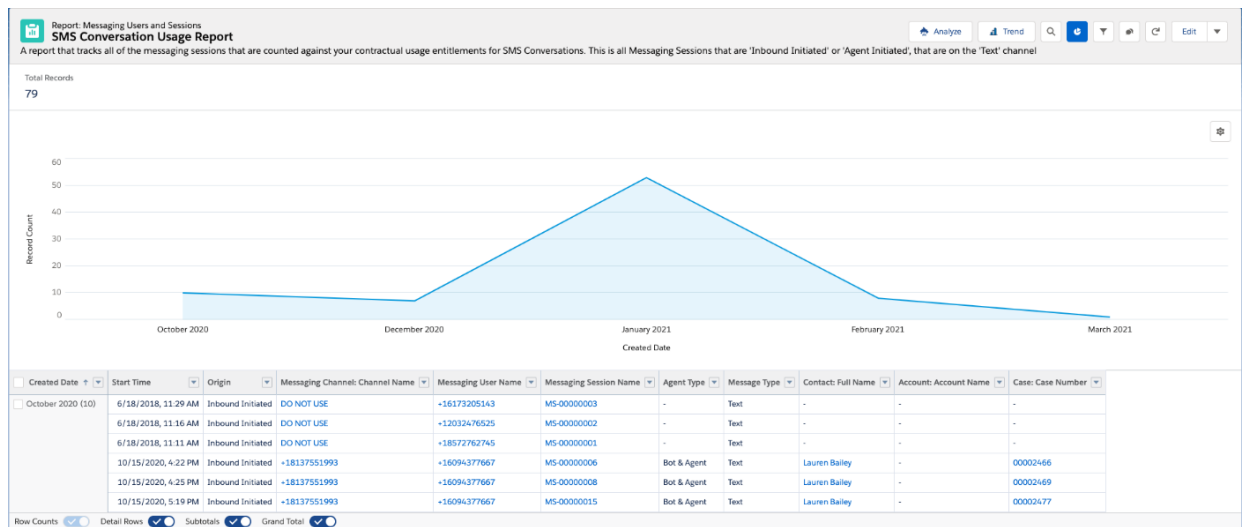
This is not a paid channel, so this report is purely here for informational purposes and completeness on the dashboard. It shows the total number of Chat conversations per month.



SMS CONVERSATION USAGE REPORT

This report is used to track the SMS Conversation usage over time, which relates to the 'Maximum Billed Agent Conversations for Messaging' Usage-based Entitlement. This shows how many 'Inbound Initiated' or 'Agent Initiated' Messaging Sessions have occurred in your Org - you have a monthly entitlement of these, which roll over month to month up until your contract anniversary. This essentially means you have a yearly allowance, so you should keep track of your monthly usage to see if you are trending towards your entitlement.

Note that due to the country multiplier, you may need to multiply the quantities found here by 2 or 3, depending on what country you are operating in to calculate your true billed usage.

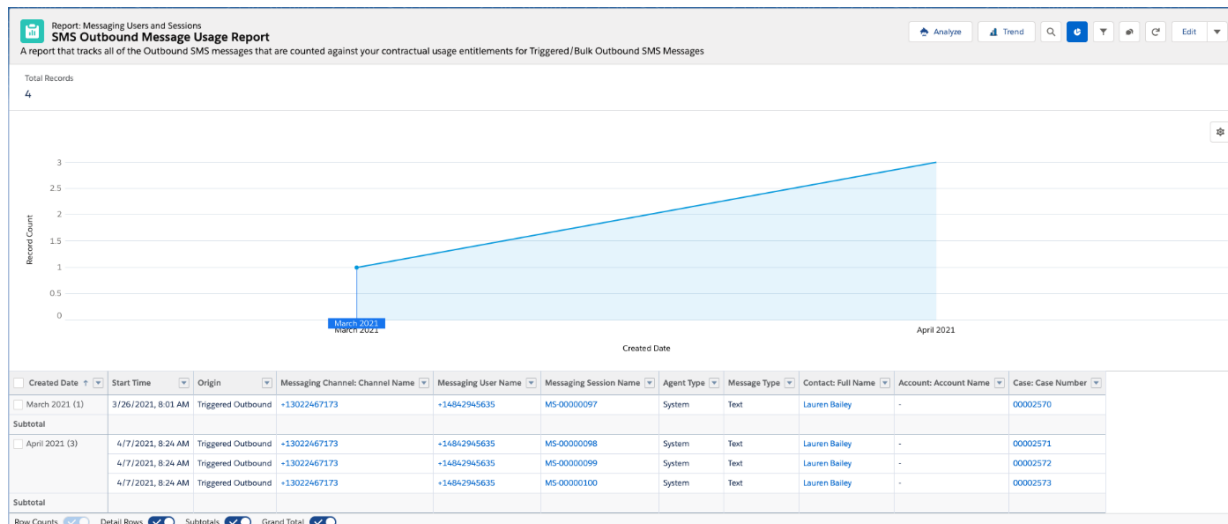


SMS OUTBOUND MESSAGE USAGE REPORT

This report details the number of Triggered Outbound (or known as 'bulk' or 'blast') SMS Messages that have been sent from the org.

These messages are a one time pool of messages that you are entitled to, so the total since the start of your contract is the important number you need to know, to ascertain as to whether you have reached (or are trending towards) your limit.

Note that due to the country multiplier, you may need to multiply the quantities found here by 2 or 3, depending on what country you are operating in to calculate your true billed usage.



WHATSAPP OUTBOUND MESSAGE USAGE REPORT

This report details the number of Triggered Outbound (or known as 'bulk' or 'blast') WhatsApp Messages that have been sent from the org.

These messages are a one time pool of messages that you are entitled to, so the total since the start of your contract is the important number you need to know, to ascertain as to whether you have reached (or are trending towards) your limit.

Note that due to the country multiplier, you may need to multiply the quantities found here by 2 or 3, depending on what country you are operating in to calculate your billed usage.

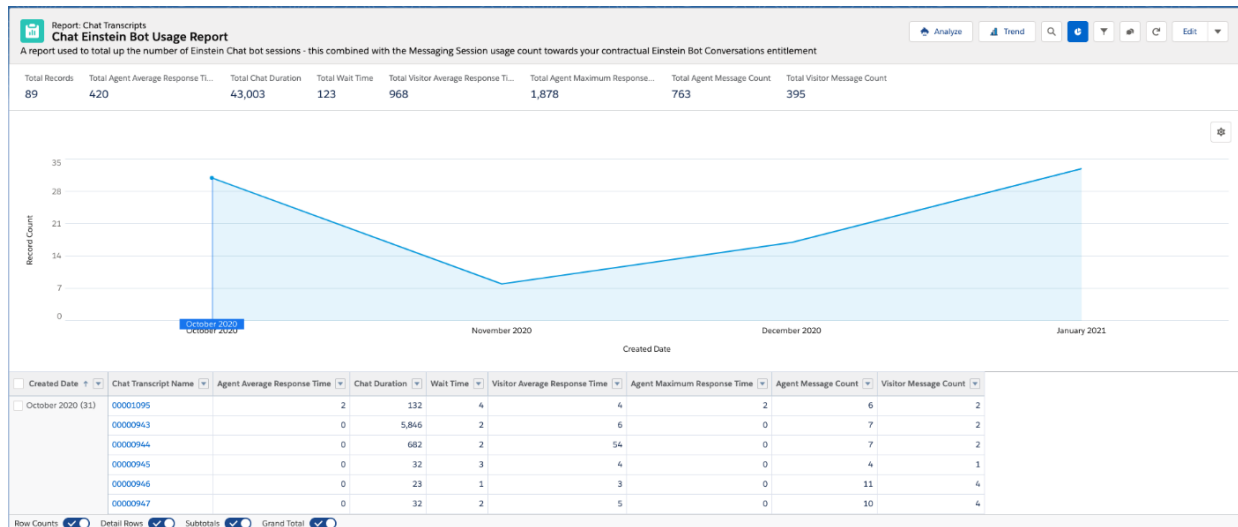
EINSTEIN BOT CONVERSATION USAGE REPORTS

Due to the quantity of data that is stored about a Bot, the session data is only retained for 180 days. Therefore to report over a longer time period, we can use Chat Transcript and Messaging Session data - the drawback of this is that we can't get the number of Einstein Bot Conversation in one report using Salesforce Reporting.

Therefore you need to add the totals of these 2 reports to find the total number of bot conversations you have consumed (if you are using your bot across multiple channels).

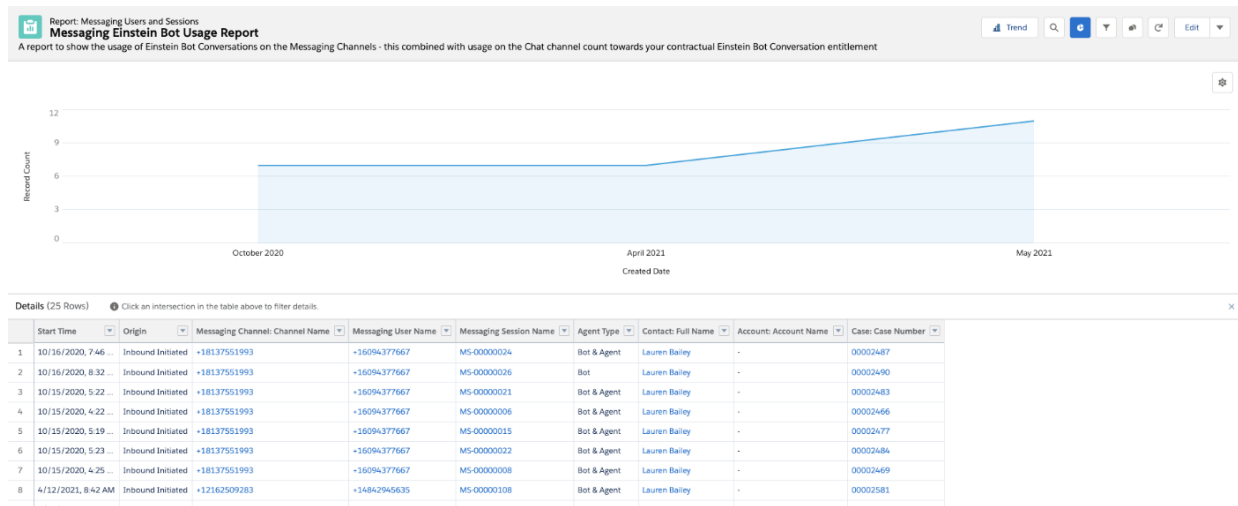
CHAT EINSTEIN BOT USAGE REPORT

This report shows all Chat conversations where the 'Is Chatbot Session' is true - this will include sessions that were only handled by a bot, as well as those where the chat was transferred/escalated from a bot to an agent.



MESSAGING EINSTEIN BOT USAGE REPORT

This report shows all Messaging Sessions/Conversations where 'Agent Type' is either 'Bot', or 'Bot & Agent' - therefore, it will include sessions that were only handled by a bot, as well as those where the chat was transferred/escalated from a bot to an agent.



Messaging Error Report

This report shows all of the Messages that were attempted to be sent, but failed. You can compare the value found in the 'Message Status Code' column with the codes on the help site: https://help.salesforce.com/s/articleView?id=sf.messaging_error_codes.htm

Report: DE - Users, Sessions, Conversations Messaging Error Report								
Analyze Trend Q Add Chart Edit								
Total Records								
3								
	Messaging Session Name	Messaging Channel: Channel Name	Entry Start Time	Contact: Full Name	Messaging User Name	Origin	Message Status Code	Message
1	MS-00000036	+12029648929	10/22/2021, 7:43 AM	Lauren Bailey	+14842945635	Agent Initiated	3004	https://suntuly-20211011-demo.lightning.force.com/lightning/CAA/view?channel=OMNI https://suntuly-20211011-demo.lightning.force.com/lightning/CAA/view?channel=OMNI https://suntuly-20211011-demo.lightning.force.com/lightning/CAA/view?channel=OMNI https://suntuly-20211011-demo.lightning.force.com/lightning/CAA/view?channel=OMNI https://suntuly-20211011-demo.lightning.force.com/lightning/CAA/view?channel=OMNI https://suntuly-20211011-demo.lightning.force.com/lightning/CAA/view?channel=OMNI https://suntuly-20211011-demo.lightning.force.com/lightning/CAA/view?channel=OMNI https://suntuly-20211011-demo.lightning.force.com/lightning/CAA/view?channel=OMNI https://suntuly-20211011-
2	MS-00000044	+12029648929	10/22/2021, 7:55 AM	Lauren Bailey	+14155551212	Triggered Outbound	2001	-
3	MS-00000046	+12029648929	10/22/2021, 7:58 AM	Lauren Bailey	+14155551212	Triggered Outbound	2001	Try sending another SMS with ar

FAQs

WHAT HAPPENS IF I EXCEED MY ALLOWED USAGE?

Your allowed usage is a soft limit - the functionality will continue to work as expected and you will not be sent a bill for exceeding them. Your account executive may contact you if you are regularly exceeding your contractual limits however.

WHERE DO I FIND MY ALLOWED USAGE?

Use the values noted in your Salesforce Contract as the official values, however you can find the various values in the 'Usage-based Entitlements' section of your 'Company Information' page within setup. The relevant values are

- **Maximum Chatbot Sessions Allowed (monthly)** - this is your number of Einstein Bot Conversations you are entitled to each month. Your total allowance rolls over month to month, until your contract anniversary.
- **Maximum Billed Agent Conversations for Messaging (monthly)** - this is your number of SMS conversations you are entitled to each month. Your total allowance rolls over month to month, until your contract anniversary
- **Maximum Billed Blast Conversations for Messaging (once)** - this is the total number of outbound/triggered SMS messages you are entitled to send. These are single use, so is the quantity you have until the end of your contract. Note that depending on your country multiplier, a single message may use up multiple of these
- **Maximum Billed Blast Conversations for WhatsApp (once)** - this is the total number of outbound/triggered WhatsApp messages you are entitled to send. These are single use, so is the quantity you have until the end of your contract. Note that depending on your country multiplier, a single message may use up multiple of these

HOW DO I INCREASE MY ALLOWED USAGE?

Please contact your Salesforce Account Executive - they will be able to help you increase your usage, by recommending the appropriate type and quantity of add-on packs.