

ODIGO for SALESFORCE

Agent User Guide

Issuer(s): Odigo Product Team
Recipient(s): Customers

Date: 26/12/2024



VERSION HISTORY		
VERSION	DATE	REASONS FOR CHANGE
1.0	21/10/2013	Initial Version WINTER 2013
2.0	06/10/2014	Version SPRING 2014
3.0	06/07/2014	Version SUMMER 2014
4.0	21/03/2015	Version SPRING 2015
5.0	12/10/2015	Version FALLS 2015
6.0	29/02/2016	Version SPRING 2016
7.0	01/07/2016	Version SUMMER 2016
8.0	25/10/2016	Version WINTER 2017
9.0	19/01/2017	Version SPRING 2017
10.3	28/01/2019	Version SPRING 2019
10.4	15/02/2019	Version SPRING 2019
10.5	08/03/2019	Version SPRING 2019
10.8	23/04/2019	Version SUMMER 2019
10.10	04/06/2019	Version SUMMER 2019
10.15	29/07/2019	Version SUMMER 2019
10.16	22/08/2019	Version SUMMER 2019
10.18	13/09/2019	Version SUMMER 2019
10.19	04/10/2019	Version WINTER 2020
10.20	10/10/2019	Version WINTER 2020
10.21	08/11/2019	Version WINTER 2020
10.25	10/01/2020	Version WINTER 2020
10.27	20/01/2020	Version WINTER 2020
10.28	04/03/2020	Version SPRING 2020
10.29	04/05/2020	Version SPRING 2020
10.30	10/06/2020	Version SUMMER 2020
10.31	06/07/2020	Version SUMMER 2020
10.32	10/07/2020	Version SUMMER 2020
10.33	27/07/2020	Version SUMMER 2020
10.34b	23/09/2020	Version SUMMER 2020
10.37	28/09/2020	Version SUMMER 2020



VERSION HISTORY		
VERSION	DATE	REASONS FOR CHANGE
10.38	21/10/2020	Version WINTER 2021
10.39	10/11/2020	Version WINTER 2021
10.40	04/12/2020	Version WINTER 2021
10.42	19/02/2021	Version SPRING 2021
10.43	12/03/2021	Version SPRING 2021
10.44	05/04/2021	Version SPRING 2021
10.45	13/04/2021	Version SPRING 2021
10.47	17/05/2021	Version SUMMER 2021
10.49	02/07/2021	Version SUMMER 2021
10.51	06/08/2021	Version SUMMER 2021
10.52	13/09/2021	Version SUMMER 2021
10.56	01/12/2021	Version WINTER 2022
10.60	12/01/2022	Version WINTER 2022
10.62	01/03/2022	Version SPRING 2022
10.64	29/03/2022	Version SPRING 2022
10.65	06/04/2022	Version SPRING 2022
10.67	02/05/2022	Version SPRING 2022
10.69	31/05/2022	Version SPRING 2022
10.72	27/06/2022	Version SUMMER 2022
10.75	19/08/2022	Version SUMMER 2022
10.76	29/08/2022	Version SUMMER 2022
10.77	13/09/2022	Version SUMMER 2022
10.78	26/09/2022	Version SUMMER 2022
10.79	07/10/2022	Version SUMMER 2022
10.81	01/12/2022	Version WINTER 2023
10.83	14/12/2022	Version WINTER 2023
10.83.1	17/01/2023	Version WINTER 2023
10.85	28/02/2023	Version SPRING 2023
10.86	16/03/2023	Version SPRING 2023
10.87	29/03/2023	Version SPRING 2023
10.88	03/05/2023	Version SPRING 2023



VERSION HISTORY		
VERSION	DATE	REASONS FOR CHANGE
10.89	16/05/2023	Version SPRING 2023
10.90	12/06/2023	Version SPRING 2023
10.91	22/06/2023	Version SUMMER 2023
10.92	28/07/2023	Version SUMMER 2023
10.94	18/12/2023	Version SUMMER 2023
10.96	31/01/2024	Version WINTER 2024
11.0	13/03/2024	Version SPRING 2024
11.1	18/03/2024	Version SPRING 2024
11.2	26/03/2024	Version SPRING 2024
11.3	18/04/2024	Version SPRING 2024
11.4	19/07/2024	Version SUMMER 2024
11.5	11/10/2024	Version SUMMER 2024
12.1	26/12/2024	Version WINTER 2025

Check the Release notes provided at the end of the [Administration User Guide](#).



Table of Contents

1	Document Purpose	6
1.1	Introduction	6
1.2	List of features [Update 10.69]	6
2	User guide	10
2.1	Introduction [Update 10.3]	10
2.1.1	Lightning Mode [Update 10.3]	10
2.1.2	Classic Standard Mode [Update 10.3]	11
2.1.3	Classic Cloud Console Mode [Update 10.3]	12
2.2	Connect / Disconnect [Update 10.29]	13
2.2.1	Logging on	13
2.2.2	Disconnect	15
2.2.3	Free-seating and managing for skills / template at connection [Update 10.52]	16
2.2.4	Free-seating and WebRTC [Update 10.90]	17
2.3	Break	19
2.4	Outbound call [Update 10.28]	20
2.4.1	How to make outbound calls under ODIGO	20
2.4.2	Click to Call	20
2.4.3	Open Number call	23
2.4.4	Phone Book call	24
2.4.5	Agent call	25
2.4.6	Skill call	26
2.4.7	Personalize the phone number presented to customer [Update 10.94]	27
2.5	Receiving calls [Update 7.1]	29
2.6	Receiving calls in Preview mode [Update 11.4]	31
2.7	Actions during a call	33
2.7.1	Hang up	33
2.7.2	Put on hold	33
2.7.3	Agent Recording [Update 5.0]	35
2.7.4	Recording and listening by the supervisor [Update 10.94]	36
2.7.5	Send digits to an IVR [New 10.88]	38
2.8	Transfer [Update 9.8]	39
2.8.1	Transferring to a free number	39
2.8.2	Click to transfer [New 8.0]	40
2.8.3	Transferring to a Skill/Agent/Mini directory/Active Directory or UCaaS [Update 10.90] 40	
2.8.4	Transfer modes	42
2.8.5	Using the "Additional data" field	43
2.9	Displaying a contact, case, opportunity, page, based on phone number	44

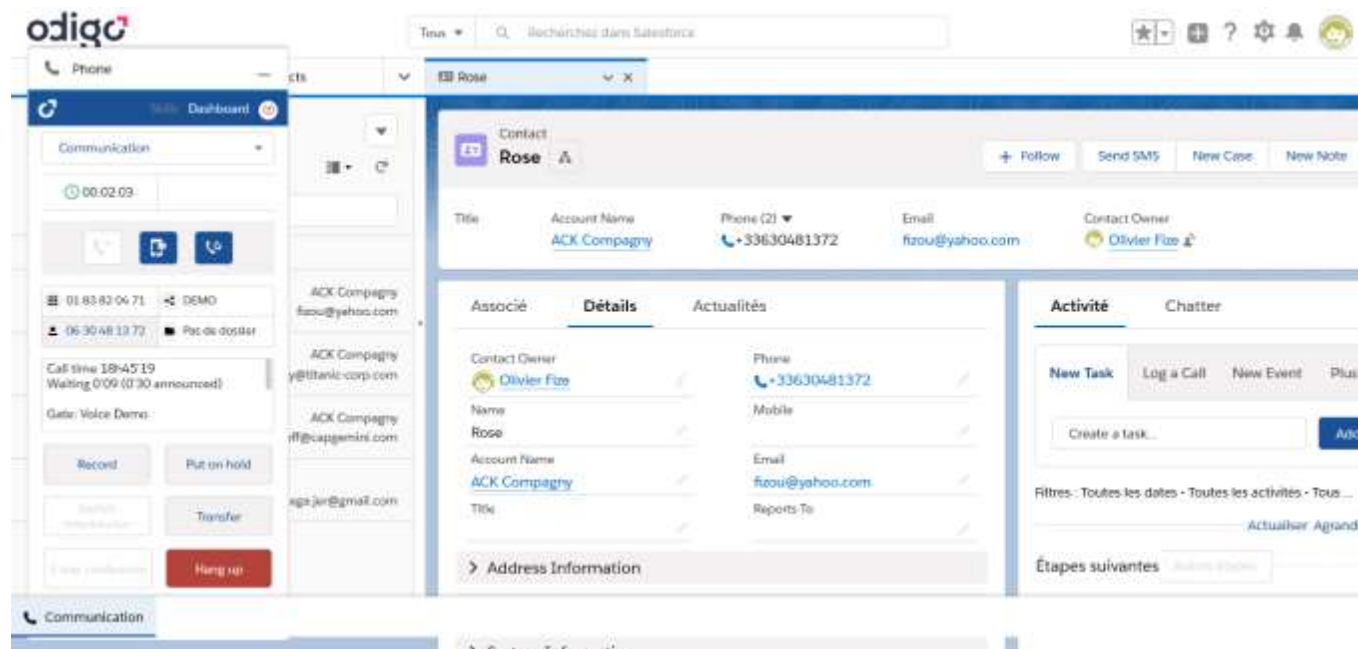


2.10	Creating an activity.....	45
2.11	Send Text Messages [Update 11.5].....	46
2.12	Schedule a callback	48
2.13	Changing skill/template or WebRTC sound options [Update 10.88]	49
2.13.1	Changing skill or template	49
2.13.2	Changing WebRTC sound options [New 10.88].....	49
2.14	Agent Supervision and Statistics.....	51
2.15	Callback in Preview mode [Update 11.4]	53
2.16	WebRTC Manual / Automatic Pick up [Update 10.83]	55
2.16.1	Auto pick up mode	55
2.16.2	Manual pick up mode [Update 12.1]	55
2.17	Callback qualification pop-up [Update 10.72]	57
2.18	Call Logs	59
2.19	Call Script.....	60
2.19.1	Automatic Mode	60
2.19.2	Manual Mode	60
2.20	Support and Version information	61
2.21	Activities List	62
2.22	Agent in mobility on SALESFORCE1.....	63
2.23	Call&Pay [Update 7.1]	65
2.24	Tag a record [New 6.5]	67
2.25	Callback Campaign [update 10.49]	69
2.25.1	Launch Callback Campaign with Odigo 3.6-5.3 [update 10.49].....	69
2.25.2	Launch Callback Campaign with Odigo 5.4+ [update 10.49]	70
2.25.3	Free-seating for campaign at connection [Update 10.31].....	72
2.25.4	Receiving a Callback Campaign call	73
2.25.5	Display Campaign Contact Information [New 10.72].....	74
2.26	Omni-Channel [Update 11.0]	76
2.26.1	Omni-Channel External Routing [Update 10.96]	76
2.26.2	Presence Synchronization [New 5.0].....	88
2.27	ODIGO Supervision and Statistics in SALESFORCE [Update 10.16].....	89
2.27.1	Real time Supervision	89
2.27.2	ODIGO Statistics in SALESFORCE [Update 10.21].....	94

1 Document Purpose

1.1 Introduction

This document describes the use of the Odigo for Salesforce connector.



Note: For the installation and configuration of the Odigo for Salesforce connector, referred to Odigo for Salesforce Admin Manual.

1.2 List of features [Update 10.69]

Odigo for Salesforce connector features are:

	Sales Cloud	Service Cloud Console	Lightning
Allow agent to manage his presence : log on, log off and put themselves on a break			
User can change his number, template or skills at login (Free Seating) or in real time.			
Agent receive qualified inbound calls via IVR with or without preview			

	Sales Cloud	Service Cloud Console	Lightning
Agent can do outbound calls: - Via Click to call, Entering a number, Phone Book, Agent or skill - Via campaign mode - Personalize the phone number presented to customer [Update 9.2]			
Callback - Automatic launch a callback at a specific date with or without agent Preview - Plan a Customer Rendezvous - Optionally create a Salesforce event (linked to the contact) in Salesforce calendar. - Upload Callback Campaign from Salesforce [update 10.25] - Callback qualification pop-up to reschedule or close a callback			
At each call, search a Salesforce record depending on the customer phone number, skill or an ID number:			
Automatic or manual search (magnifying glass) via Salesforce Open CTI Softphone Layout			
Display a search screen in the case of multiple occurrences			
Display a new contact screen with the number pre-entered in the case of a new customer			
Call/run a specific search script via Salesforce Open CTI Softphone Layout [Update 9.12]			
Activity creation - Automatic or manual, - Containing the information of the conversation (Duration, Type, etc.) - Agent Activities List Screen include - Can be pre-filled with note taking during the conversation (Call Log)			

	Sales Cloud	Service Cloud Console	Lightning
Call transfer: - To a Free number - To a mini directory - To a skill or agent with availability display - To Active Directory [New 10.69] - In supervised, semi-supervised or blind mode - While on a call with second agent, possibility to switch or to do 3-way Conference calls Click to transfer [New 8.0] while in conversation			
Call Recording Automatic or manual button to record conversation - Voice Record Tags [New 6.5] - Send it by an e-mail or store it on ODIGO Record in post-call phase. Listen Voice record from activity [Update 7.1]			
Send SMS			
Realtime Supervision and Statistics for the supervisor - Display agents and gates status and metrics - Supervisor can listen, record or change template/skills of his agents in real time [New 5.0] - Also available on SALESFORCE1 (MOBILE)			
Specific Statistics and supervision screen are also available for the agent			
Manage ODIGO User Access from SALESFORCE [New 5.0]			
External JavaScript to personalize CTI Behavior [New 5.0]			
Call Script [Update 10.30]			

	Sales Cloud	Service Cloud Console	Lightning
IVR Survey [New 5.9]			
Call&Pay [Update 7.1]			
Personalization of « Support & Version information »			
ODIGO Calls via SALESFORCE1	Not apply	Not apply	Not apply
Multiple Odigo Configuration [New 5.3]			
API Mode for SALESFORCE callback or campaign (WS99API).			
Insert ODIGO Unified Ticket in SALESFORCE (Missed call , ...) [New 5.0]			
Omni-Channel Presence synchronization [New 5.0]			
Omni-Channel External Routing [Update 10.38] - Case (Mail, Social Network) and Chat with Odigo V5.2+ - Lead with Odigo V5.3+ - Custom Object and Messaging (Digital engagement) with Odigo V5.7+			
WebRTC [Update 10.62] - Agent can do/receive calls from customer with its internet browser (Chrome + Odigo V5.3+)			
Softphone - Compatible with Softphone V6 only			
Language [Update 10.18] - Odigo Connector is available in English, French, and Spanish			

Check the release notes provided at the end of the [Administration User Guide](#).

2 User guide

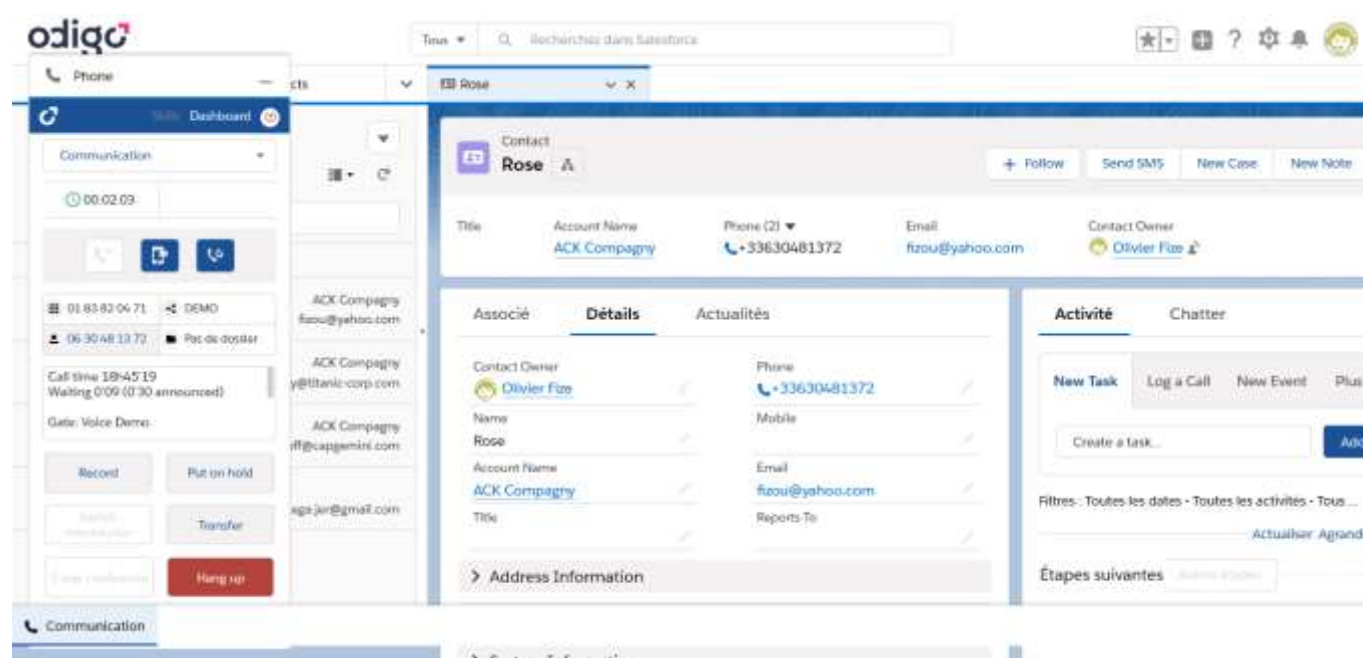
2.1 Introduction [Update 10.3]

The agent logs him on <http://login.salesforce.com> using his SALESFORCE identifier.

The display and use of the OPENCTI Odigo for Salesforce depend on what has been configured by your SALESFORCE administrator for your Salesforce user account.

2.1.1 Lightning Mode [Update 10.3]

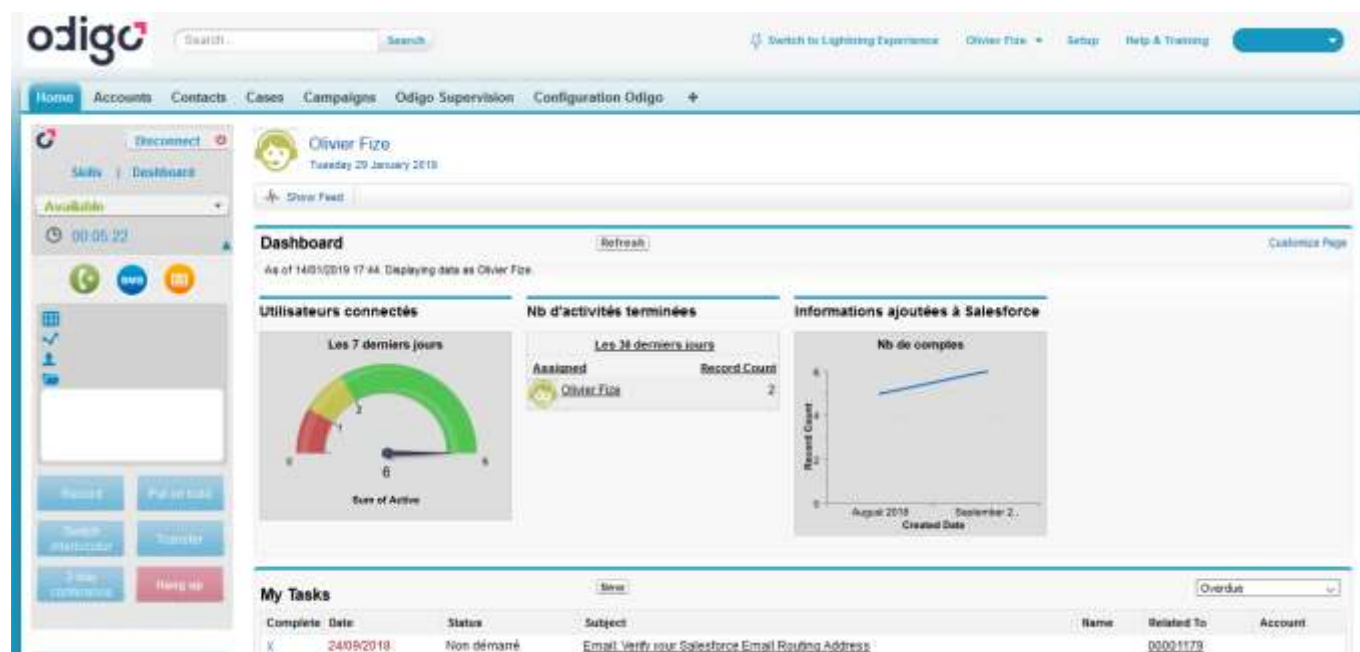
In « Lightning » mode, The OPENCTI Odigo for Salesforce connector is displayed at bottom left corner.



Update 10.3: New graphical Charter for CTI and pop up

2.1.2 Classic Standard Mode [Update 10.3]

In standard mode, the OPENCTI Odigo for Salesforce connector will display on the top left of your screen:



Update 10.3: New graphical Charter for pop up

You can change it from compact to extended mode by clicking on the small arrow.

In compact mode, the connector changes to extended mode automatically when a call is taken and closes again on wrap-up.

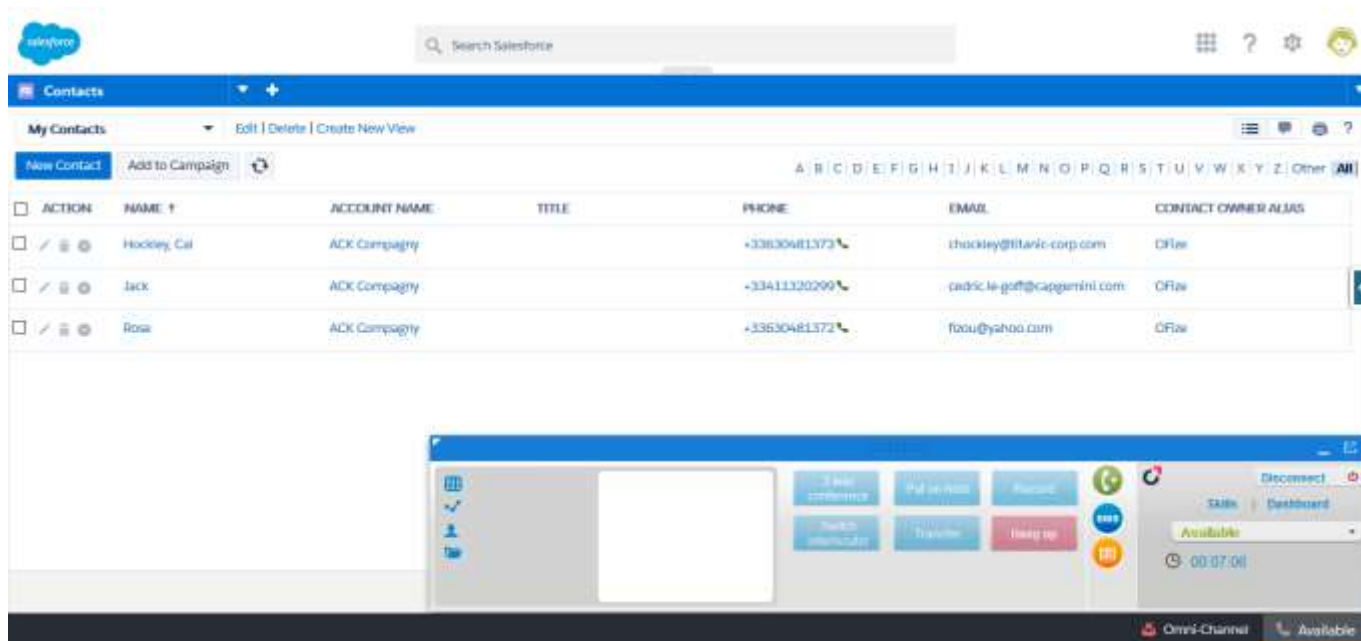
Extended Mode	Compact Mode

Note: If you are using multiple tabs in your browser in standard mode, the automatic display of the contact record and activity creation features must be disabled, otherwise everything will pop up several times. However, a manual way to display corresponding contact record from CTI is available.

2.1.3 Classic Cloud Console Mode [Update 10.3]

Console mode is highly recommended for Contact Center which chain numerous callbacks and are doing Omni-Channel works.

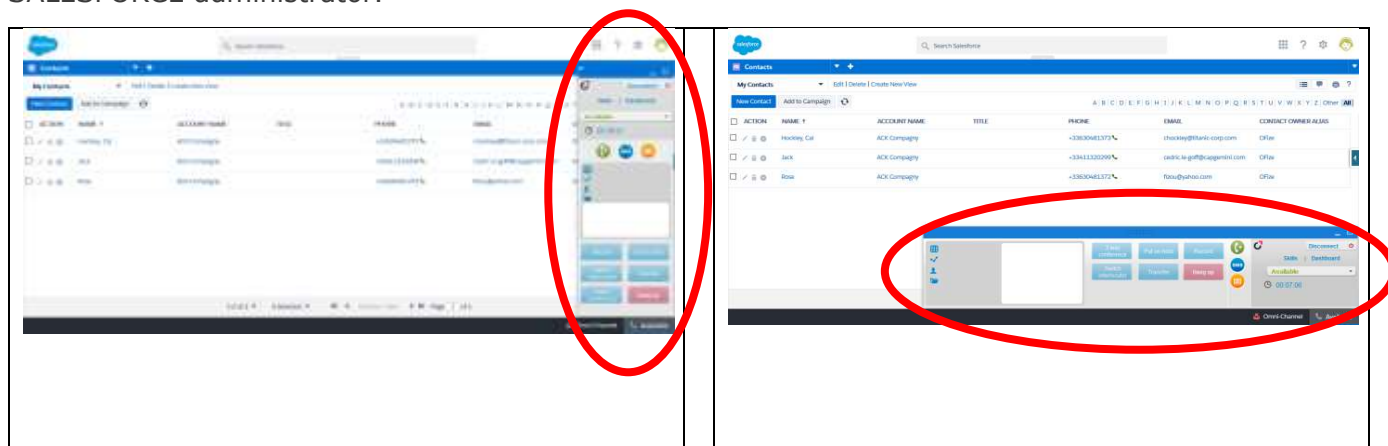
In this mode, the OPENCTI Odigo for Salesforce connector is displayed on the bottom right.



Update 10.3: New graphical Charter for pop up

Note:

- The connector can be displayed horizontally or vertically depending on the choice made by your SALESFORCE administrator.

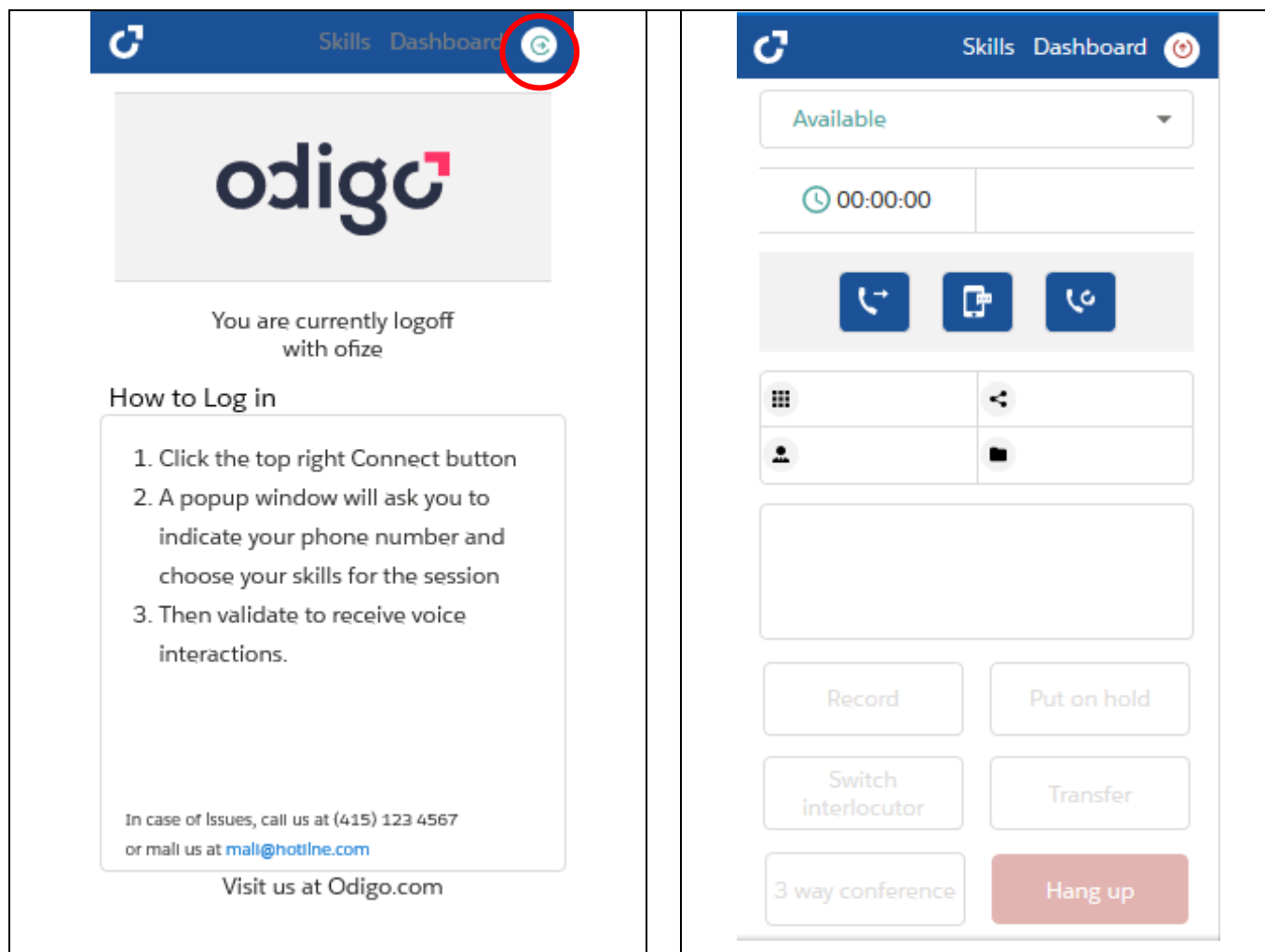


2.2 Connect / Disconnect [Update 10.29]

You must indicate your presence on the ODIGO telephony system to be able to receive or make outbound calls.

2.2.1 Logging on

To do this, click the "Connect" button on the top right of the connector

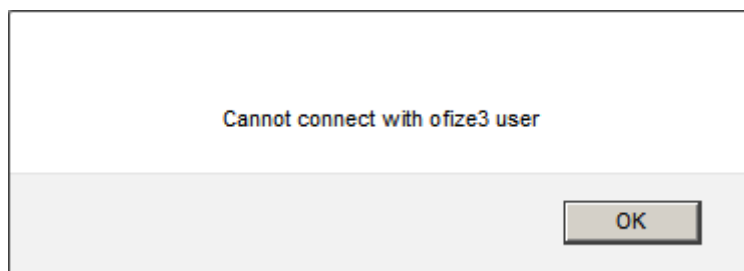


When "Available" status is displayed, inbound calls from your customers may be taken on the telephone number entered in the user's ODIGO profile.

You can use the SALESFORCE "Click to call" function straight away to make outbound calls.

Note:

- By default, the connector retrieves the last known state of a user. So, if you close your browser during a previous session without having disconnected, you will automatically return to your previous state (For example, "Available" or "Break") as you left it.
- The two counters are respectively the time you have been in the current state and the time remaining in this state (For example, for a break or wrap-up).
- During the session, if a message of the following type is displayed:

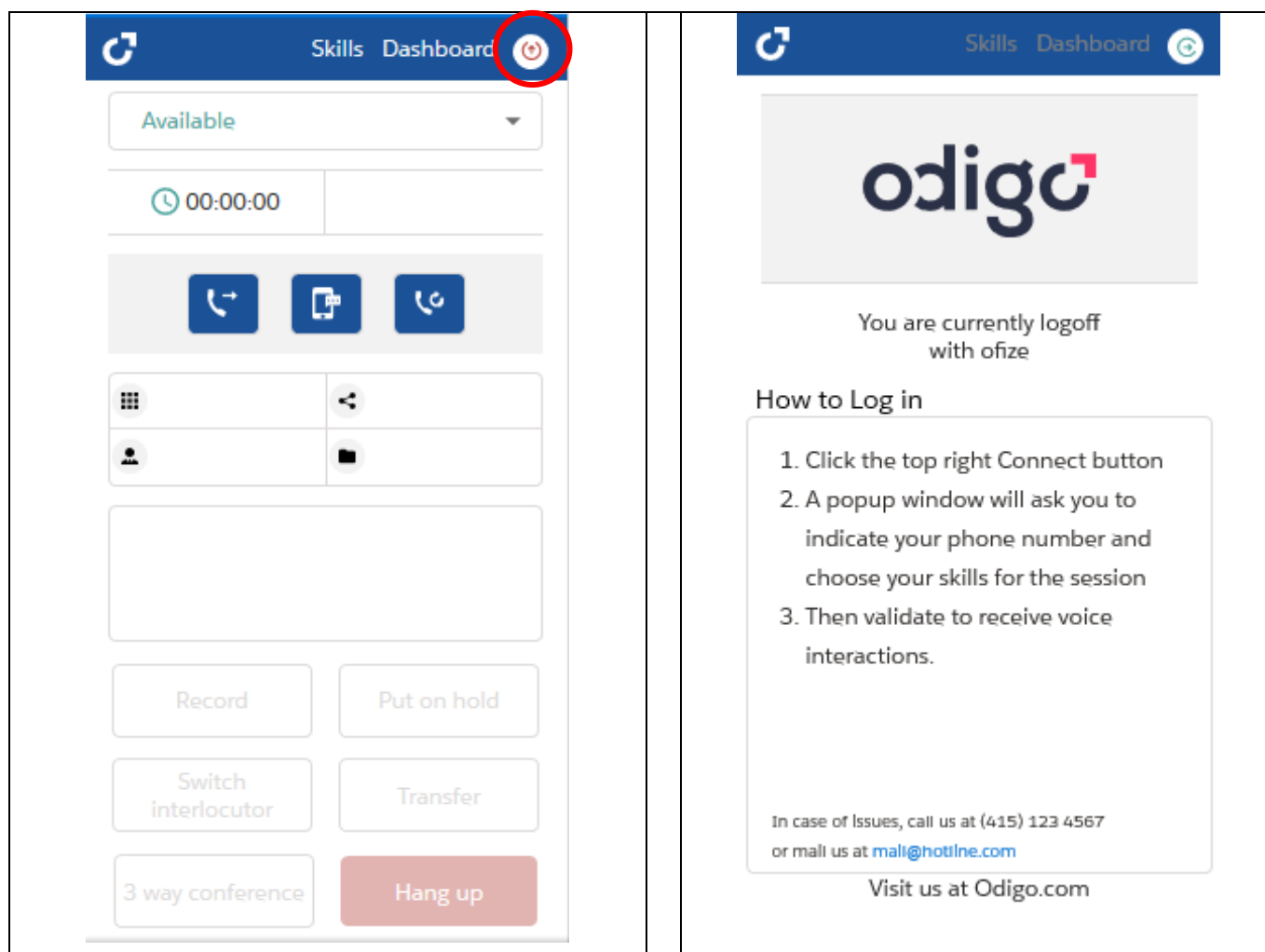


Carry out the following checks:

Message	Action
Log on error with user "xxxx"	Check the ODIGO username "xxxx" entered in the "SALESFORCE user" record is correct and exists in the ODIGO administration (don't forget the export!)
Telephone number being used by another agent. (WS108) Telephone number being used by dynamic routing. (WS111) No skill can be selected for this agent. (WS103)	Ask your ODIGO administrator to check the configuration of your user account

2.2.2 Disconnect

To do this, click the "Disconnect" button on the top right of the connector.



When "Logoff" status is established, no more inbound calls from your customers will be sent to you and you will no longer be able to use the SALESFORCE "Click to call" feature.

2.2.3 Free-seating and managing for skills / template at connection [Update 10.52]

This feature requires the agent to be authorized to change their type of phone, phone Number, skills template in ODIGO.

It allows the agent to change ODIGO default information when they connect:



You are currently logoff with morgane2

How to Log in

1. Click the top right Connect button
2. Indicate your phone type, your phone number if necessary, your template, your skills and your campaigns
3. Then validate to receive voice interactions.

In case of Issues, call us at +33 811 01 12 34 or mail us at hotline-client@prosodie.com

Visit us at odigo.com

Connection informations

Phone Type

Telephone

Fill in your phone number

0630481372

Select a model

Default Configuration

SKILLS

CAMPAIGN

SKILL LIST	ACTIVATED
Compétence Démo	☒
Salesforce Case	☒
Salesforce Chat	☒

Validate

Remarks for free setting:

- 1) Numbers are proposed in the following order:
 - The phone number in the SALESFORCE user record for the user (Phone Field)
 - The phone number in ODIGO

- 2) If the field is blank (displayed blank or entered blank), an error message appears, and the connection cannot take place.
- 3) [New 10.52] In Odigo 5.6+, Agent can test his phone before login by clicking on phone picto next Phone Number field: A test call is emitted to the Phone to make it ring.

2.2.4 Free-seating and WebRTC [Update 10.90]

This feature requires the agent have the WebRTC telephony configured and the "Allow agent to modify their WebRTC sound options" option activated in the package configuration.

It allows the agent to change their WebRTC sound options:

- Microphone input
- Speaker output
- Ringtone output if "Play ringtone on separate device" checked



You are currently logoff with morgane2

How to Log in

1. Click the top right Connect button
2. Indicate your phone type, your phone number if necessary, your template, your skills and your campaigns
3. Then validate to receive voice interactions.

In case of Issues, call us at +33 811 01 12 34 or mail us at hotline-client@prosodie.com

Visit us at odigo.com

Connection informations

Phone Type

WebRTC
▼

Fill in your phone number

📞

Select a model

Default Configuration
▼

SKILLS
CAMPAIGN
WEBRTC
Ⓢ

🎤

Par défaut - External Mic (Realte
▼

🔊

Par défaut - Realtek HD Audio 2i
▼

☒
Play ringtone on separate device

🔔

Par défaut - Realtek HD Audio 2i
▼

Validate

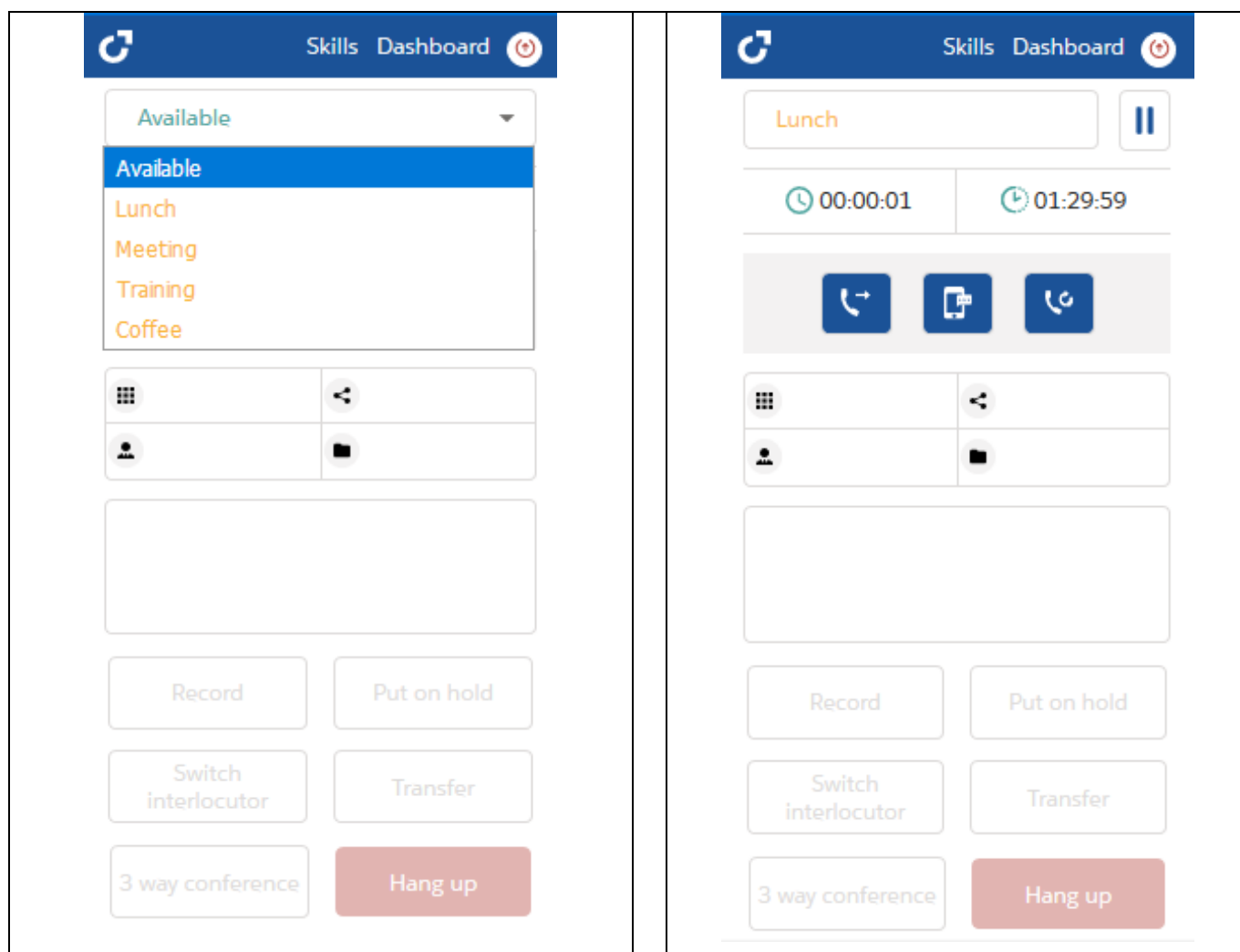


Remarks :

- The ringtone is played on the output device if the "Play ringtone on separate device" is not checked
- The WebRTC sound options can be changed during a communication
- The WebRTC sound options can be selected at logon without free-seating rights

2.3 Break

It is possible to temporarily stop receiving calls by selecting one of the break options from the list.



The break is exited automatically after a certain time (configurable in ODIGO). You can shorten this time by clicking on the "||" button or selecting the status "available" again.

2.4 Outbound call [Update 10.28]

2.4.1 How to make outbound calls under ODIGO

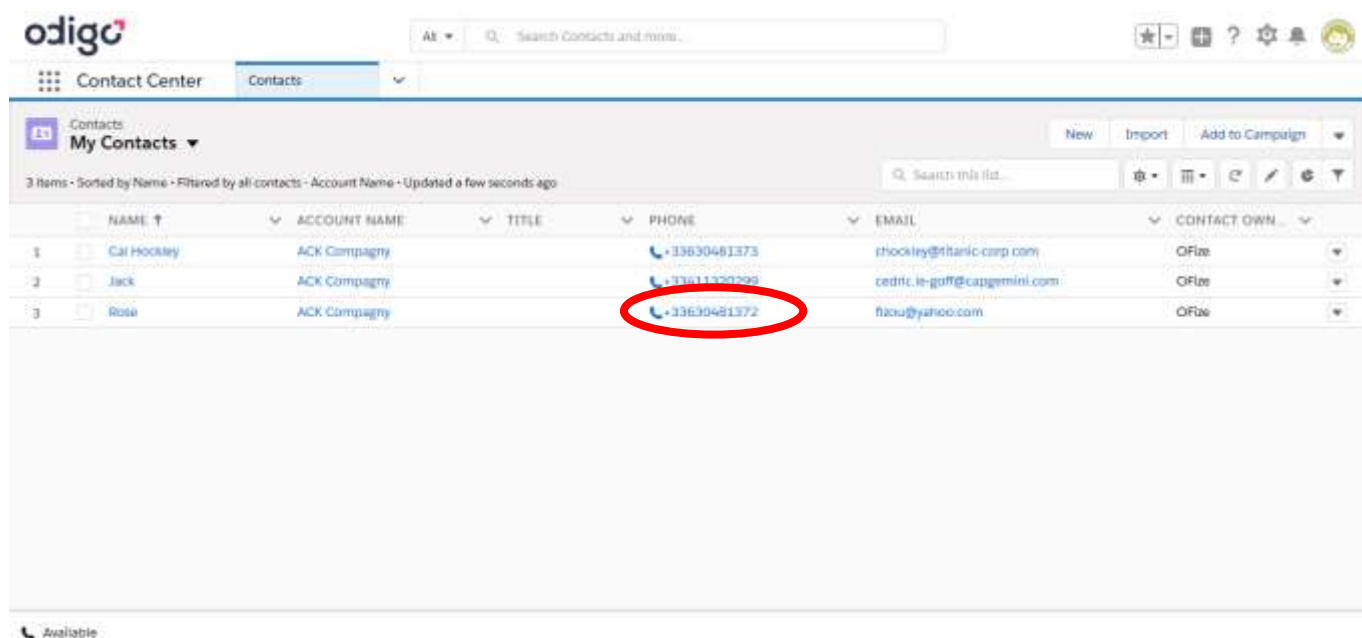
The agent must be authorized in ODIGO to make outbound calls and be in "Available" or Odigo Activity (Break, ...) status.

The agent is called first and then the customer is called and connected to agent.

At the end of the call, the agent returns in its original status.

2.4.2 Click to Call

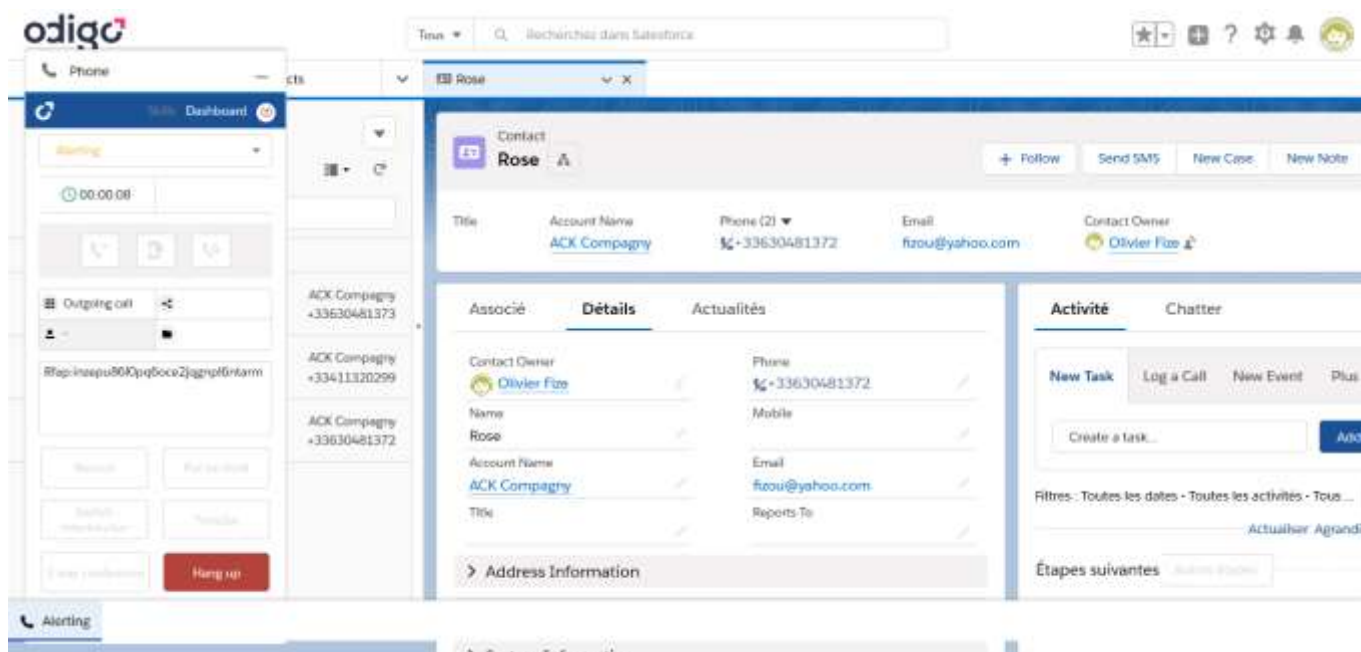
You can call any number displayed by SALESFORCE by clicking on it.



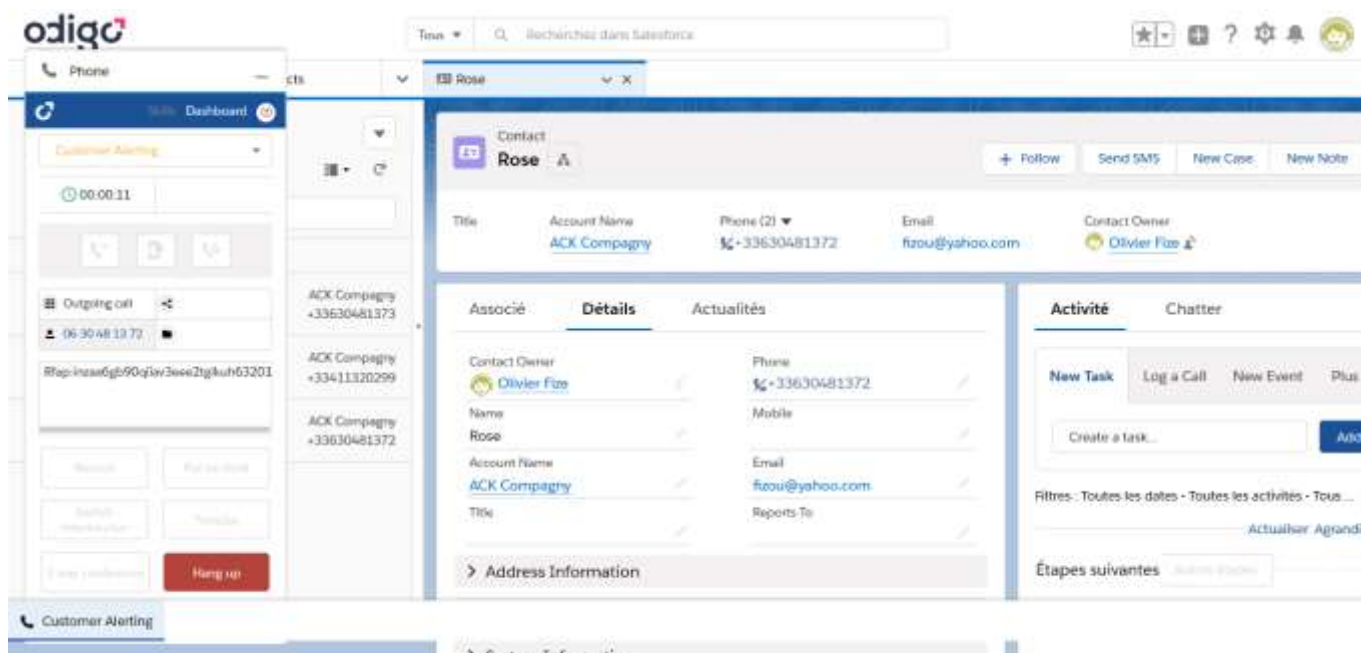
The screenshot shows the Odigo Contact Center interface. At the top, there is a search bar and a 'Contact Center' tab. Below the tab, there is a 'My Contacts' section with a list of 3 items. The list is sorted by Name and filtered by all contacts. The table has columns for NAME, ACCOUNT NAME, TITLE, PHONE, EMAIL, and CONTACT OWN. The phone number +33630481372 is circled in red in the third row.

	NAME	ACCOUNT NAME	TITLE	PHONE	EMAIL	CONTACT OWN
1	Cal Hookley	ACK Compagny		+33630481373	thookley@titanic-corp.com	OFize
2	Jack	ACK Compagny		+33611330299	cedric.le-guff@capgemini.com	OFize
3	Rose	ACK Compagny		+33630481372	fracku@yahoo.com	OFize

The dialed number is displayed in the connector and that changes the status into "Alerting". The SALESFORCE agent's phone starts ringing:



SALESFORCE agent picks up the phone and then, ODIGO dials the customer's number : Connector changes to status "Customer Alerting" and customer record is displayed :



When the customer picks up, connector switches to "Communication":



The screenshot displays the Odigo CRM interface. On the left is a 'Phone' sidebar with a 'Communication' section showing a timer at 00:00:00 and buttons for 'Record', 'Put on hold', 'Transfer', and 'Hang up'. The main area shows a contact record for 'Rose' with fields for Title, Account Name (ACK Compagny), Phone (2) (+33630481372), Email (fzou@yahoo.com), and Contact Owner (Olivier Fize). Below these are tabs for 'Associé', 'Détails', and 'Actualités'. The 'Associé' tab shows a message: 'We found no potential duplicates of this contact.' and a section for 'Social Personas (1)' with a table listing social media handles. On the right, there are tabs for 'Activité' and 'Chatter', with a 'New Task' button and a 'Log a Call' button.

SOCIAL NETWORK	SOCIAL HANDLE
Twitter	glnhub6801

To end up the call, agent can either hang up the phone or click on the "Hang up" button.

2.4.3 Open Number call

Click on "Outbound Calls" and enter a number to dial, then validate:

Skills Dashboard

Available

00:00:00

Record

Put on hold

Switch interlocutor

Transfer

3 way conference

Hang up

Outbound call

Call type

☒ Open number
 ☐ Phone book
 ☐ Skill
 ☐ Agent

Open number

Fill in the number

0630481372

Validate

The number dialed is displayed in the connector which changes to status "Alerting". The system then acts in the same way as for a "click-to-call" call as described above.

2.4.4 Phone Book call

Click on "Outbound Calls" and select a number on a directory, then validate.

Skills Dashboard

Available

00:00:00

Record

Put on hold

Switch interlocutor

Transfer

3 way conference

Hang up

Outbound call

Call type

☐ Open number
 ☒ Phone book
 ☐ Skill
 ☐ Agent

Phone book

Mini-Directory1

Entries

Filter

Contact 11 - 1111111111

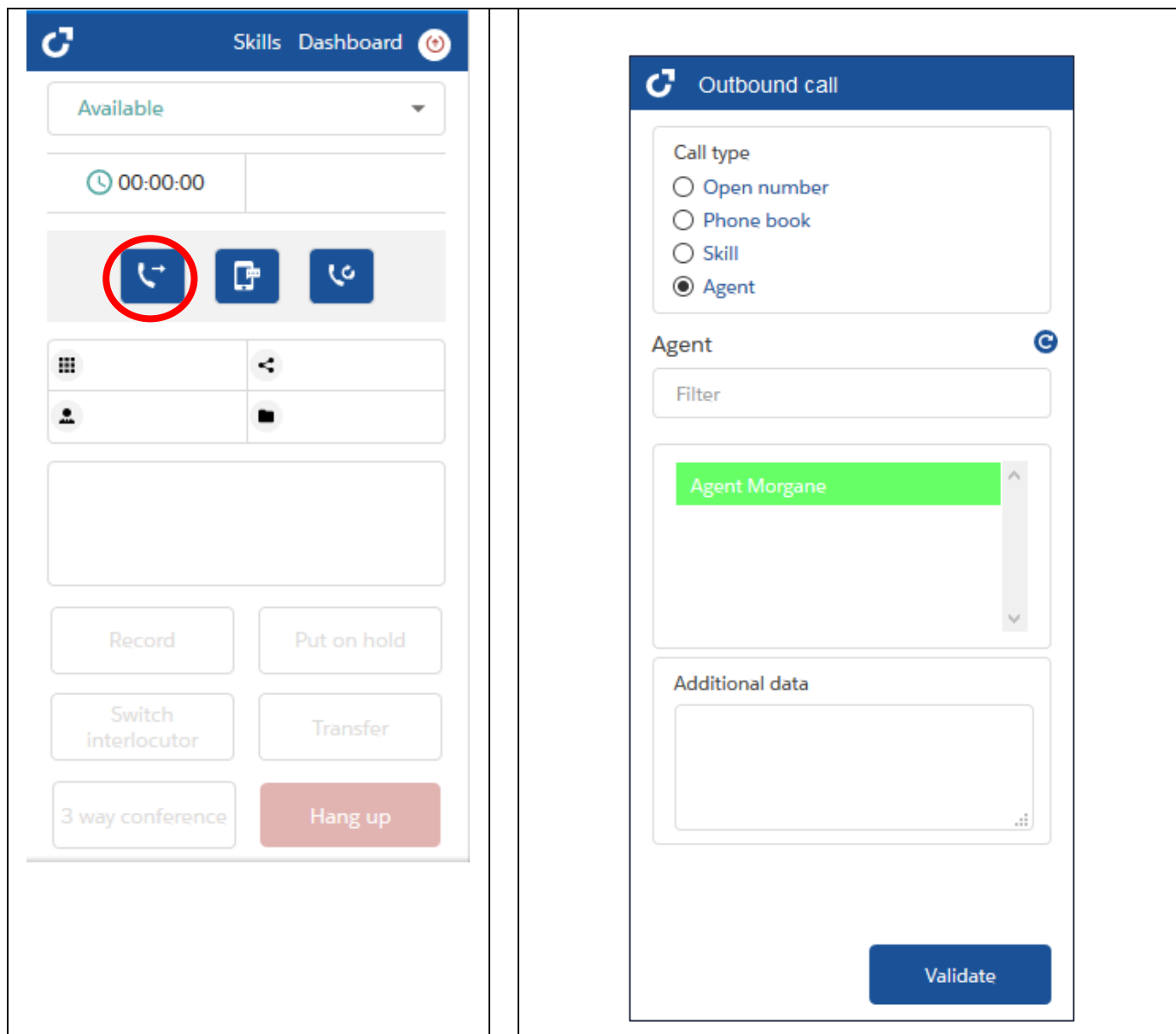
Contact 12 - 2222222222

Validate

The dialed number is displayed in the connector which changes to status "Alerting". The system then acts in the same way as for a "click-to-call" call, as described above.

2.4.5 Agent call

Click on "Outbound Calls" and select the option *Agent* in Call Type list: this will display the list of agents with background color based on their status. Select an available agent then click on *Validate*.

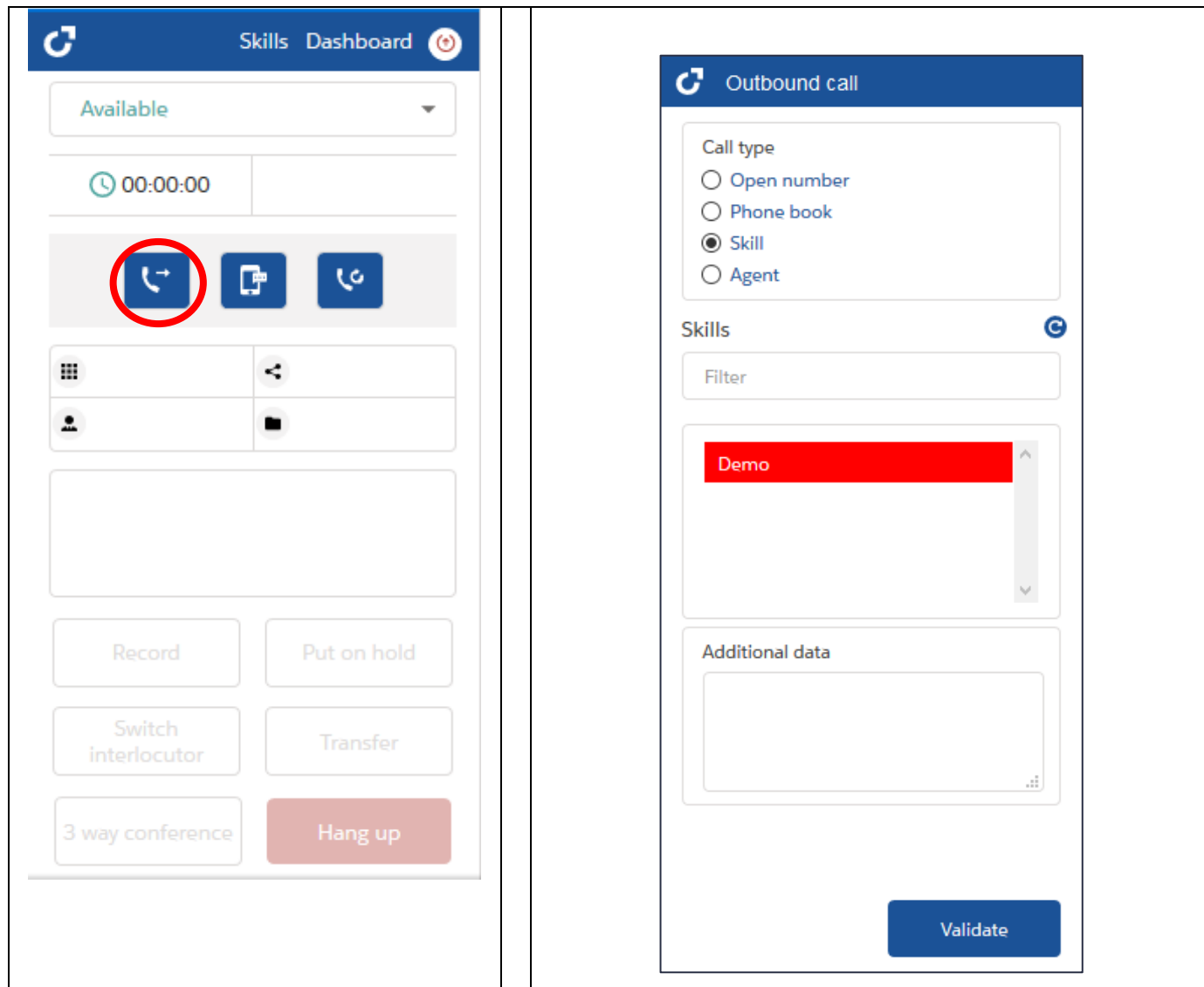


The image shows two side-by-side screenshots of a software interface. The left screenshot is the 'Skills Dashboard' with a blue header. It features a status dropdown set to 'Available', a timer at '00:00:00', and a row of three call-related icons. The first icon, representing an outbound call, is circled in red. Below this are several buttons: 'Record', 'Put on hold', 'Switch interlocutor', 'Transfer', '3 way conference', and 'Hang up'. The right screenshot is the 'Outbound call' window, also with a blue header. It contains a 'Call type' section with radio buttons for 'Open number', 'Phone book', 'Skill', and 'Agent' (which is selected). Below this is an 'Agent' section with a 'Filter' input and a list of agents. 'Agent Morgane' is highlighted in green. At the bottom right of this window is a blue 'Validate' button.

The Agent dialed, displayed in the connector, changes his status to "Alerting". The system then acts in the same way as for a "click-to-call" call described above.

2.4.6 Skill call

Click the "Outbound Calls" and select *Skill* option as CallType which will display the list of skills enabled for logged in agent. Green and Red background colors of skill if it's available to call or not, select an available Skill and click *validate*.

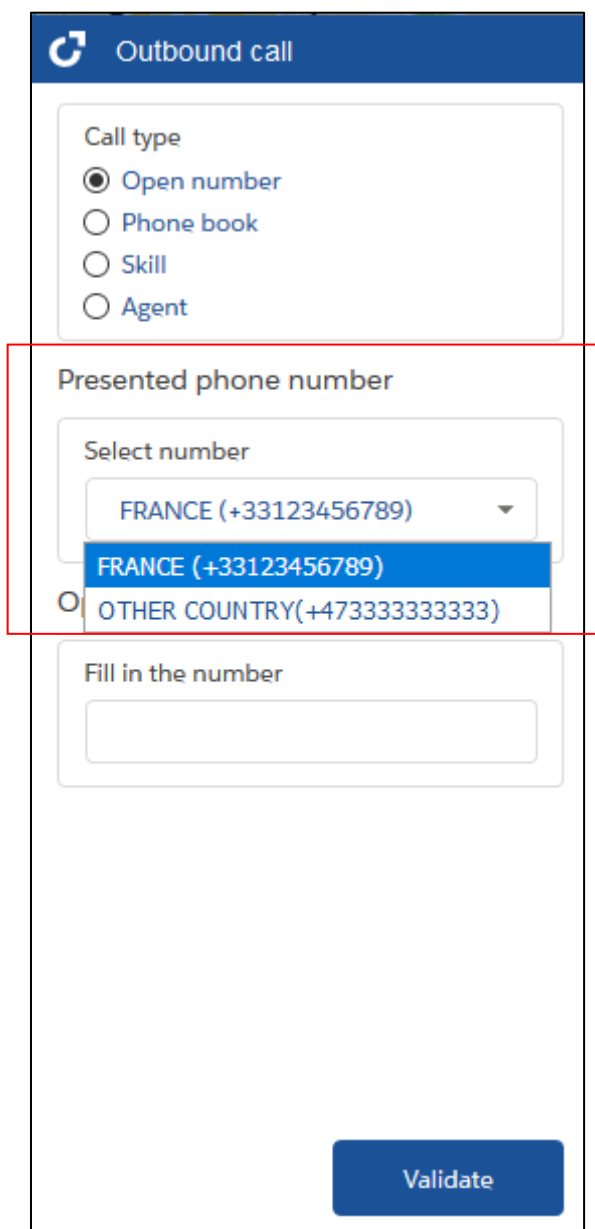


The image shows two side-by-side screenshots of a software interface. The left screenshot is titled "Skills Dashboard" and features a status dropdown set to "Available", a timer at "00:00:00", and a row of three call-related icons. The first icon, representing an outbound call, is circled in red. Below this are several functional buttons: "Record", "Put on hold", "Switch interlocutor", "Transfer", "3 way conference", and "Hang up". The right screenshot is titled "Outbound call" and displays a "Call type" section with radio buttons for "Open number", "Phone book", "Skill" (which is selected), and "Agent". Below this is a "Skills" section with a "Filter" input and a list of skills; the skill "Demo" is highlighted with a red background. At the bottom of the right panel is a blue "Validate" button.

The Skill dialed is displayed in the connector which changes to "Alerting" state. The system then acts in the same way as for a "click-to-call" call described above.

2.4.7 Personalize the phone number presented to customer [Update 10.94]

If one or several “presented phone numbers” have been indicated by your SALESFORCE or ODIGO administrator, a new “Presented phone number” section is now displayed in the “Outbound Call” Popup:



Then, on validate, the call is emitted with the presented phone number selected by the agent.

By Example, if agent selects “FRENCH IVR” item, the Customer will see an incoming call from +33171087348 or if he selects “OTHER IVR” the Customer will see an incoming call from +47333333333.

Important note about ClicktoCall behavior modification:

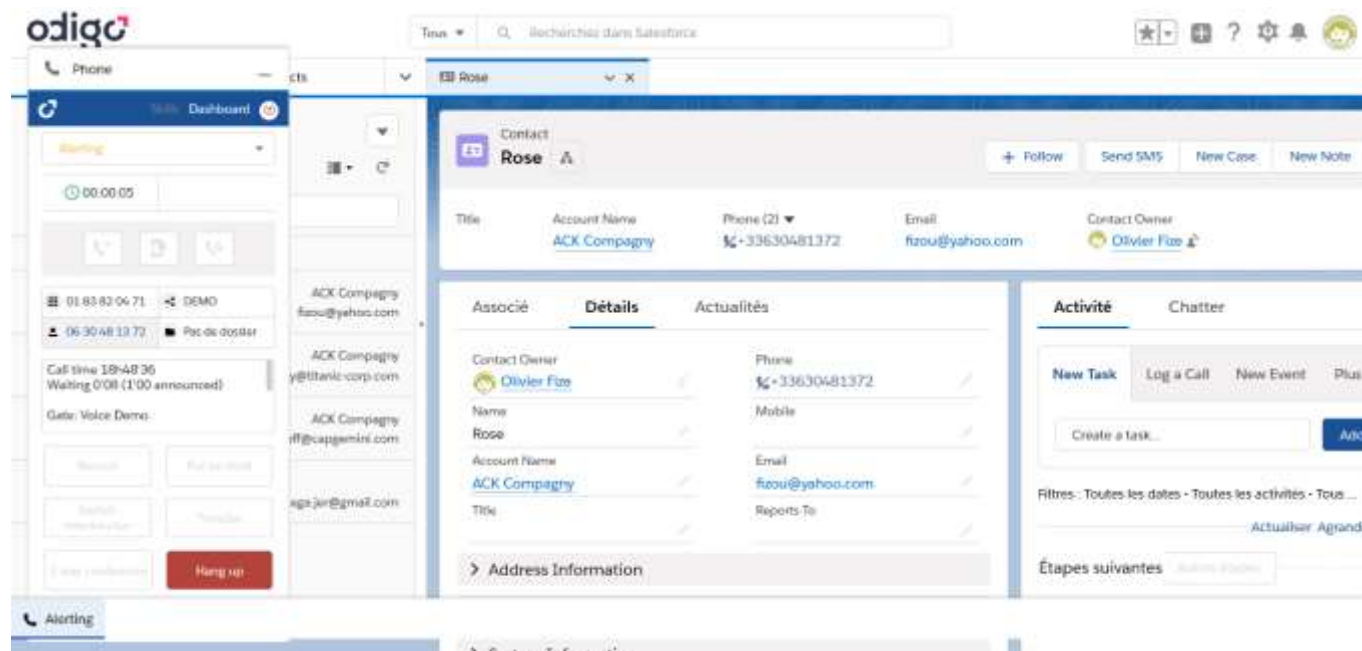


- If several “Presented phone numbers” are indicated in the configuration then the SALESFORCE “ClickToCall” feature will now display the “OutBound Call” pop-up to let the agent select one of the phone numbers to present before emitting the call.
- If there is no or only one “Presented phone number” indicated in the configuration then, the “ClicktoCall” will emit directly the call (without Popup) with this “Presented phone number”.
- The presented Phone number can also be dynamic, depending on the context of ClickToCall (sample: Presented Number depends of contact country). Ask your SALESFORCE administrator to know the exact configuration [Update 9.2]
- From Odigo version 5.12, if the STIR/SHAKEN feature is enabled in Odigo Admin, if a presented phone number is not added to the STIR/SHAKEN list, the default phone number set in STIR/SHAKEN will be displayed instead of the selected phone number. So we recommend to use only Outbound Caller ID in Odigo agent profile.

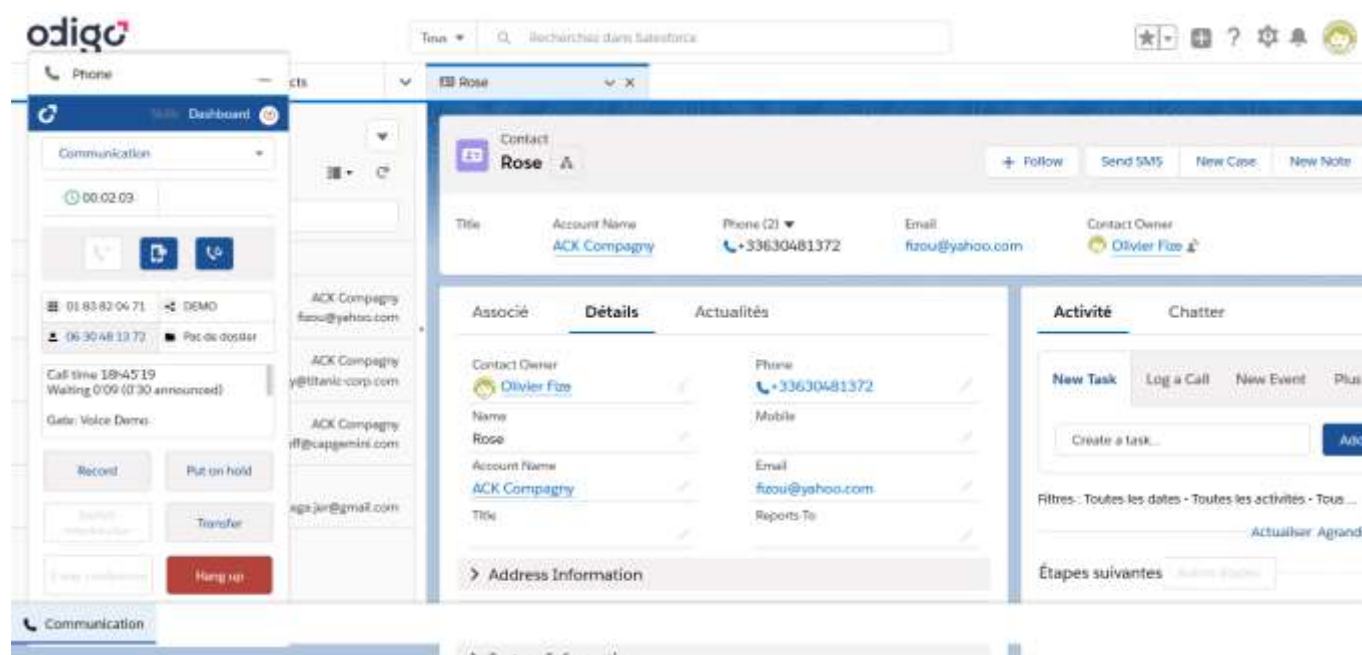
2.5 Receiving calls [Update 7.1]

The customer calls a voice server to be put through.

The caller's number and the skill selected on the IVR is displayed on the SALESFORCE user's connector until they pick up. The customer record for the number is displayed opposite the connector



When the SALESFORCE user picks up, they are in touch with the customer. Their connector appears as shown below.



To finish the call, the user can either hang up their phone or click on the "Hang up" button.

The connector then changes temporarily to "Wrap Up" state. Like break state, this state prevents further calls being received for a period configurable in ODIGO.

An activity is automatically saved when the phone is hang-up. This activity is displayed to the SALESFORCE user who can add qualification information to it.

Modifier Inbound call of the 2019/01/29 at 18:48

Task Information

* Assigned To: Olivier Fize

Related To: Recherche des Accounts...

* Subject: Inbound call of the 2019/01/29 at 18:48

Name: Rose

Due Date: 29/01/2019

Comments:

Save & New Cancel Save

At the end of the configured WRAP-UP time, the connector automatically changes back to available state.

Note: That the activity created automatically got all the Odigo call Information.

ODIGO Information

Call type	Inbound	Campaign	
Call start time	29/01/2019 16:02	Folder ID	
Call end time	29/01/2019 16:03	Pas de dossier	
Call duration	00:00:25	Call result	
Phone number	0630481372	Call fail reason	
Call ID	5c506b030eni0w00017b0201	Call fail cause	
IVR Number	0183820471	Survey name	
Sale	DEMO	Survey information	
Waiting time	00:00:11	Survey score	
		SMS ID	

Available

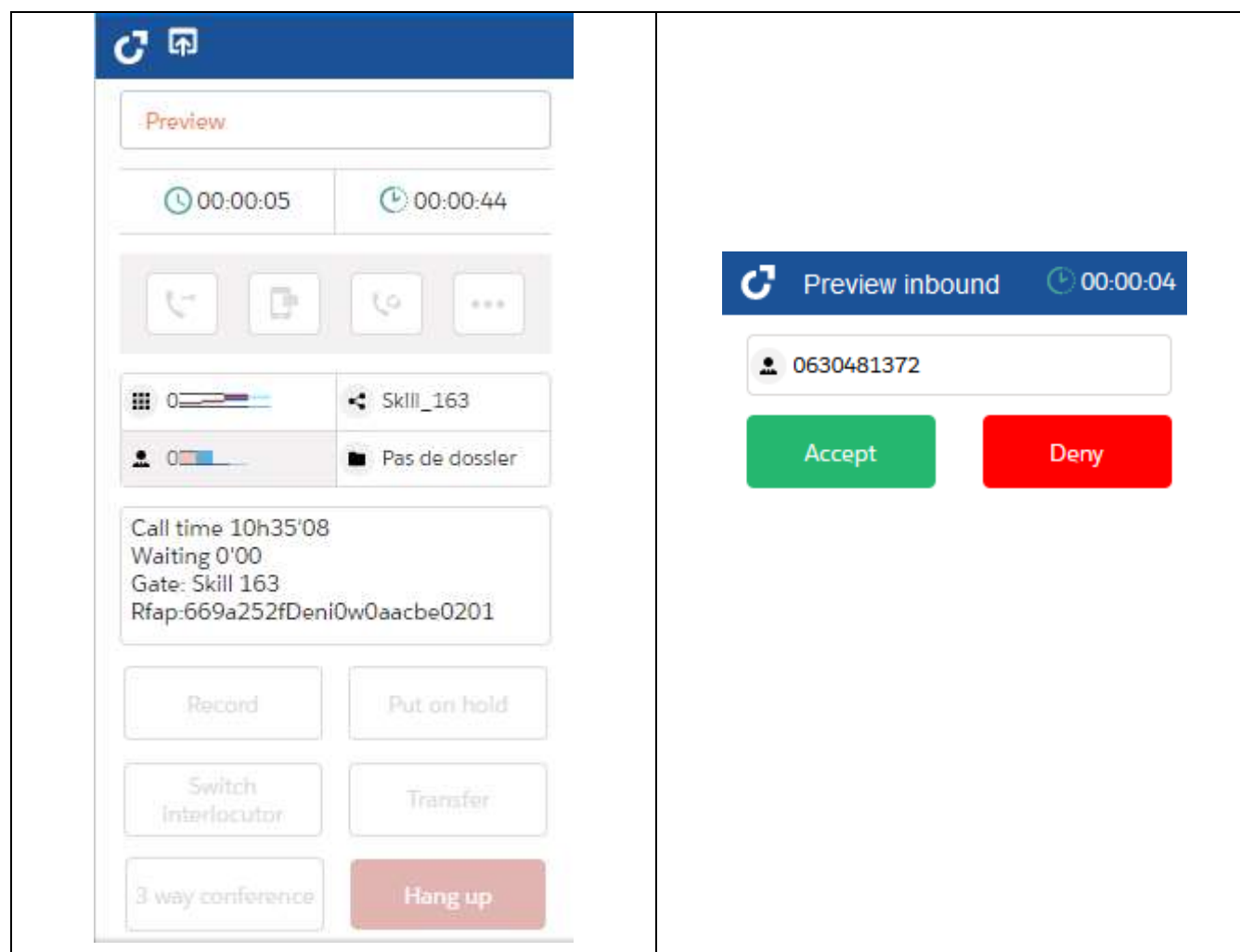
Note: You can listen the ODIGO record directly in the post-call activity, few minutes after the conversation had been ended.

2.6 Receiving calls in Preview mode [Update 11.4]

This feature requires the ODIGO gate to have been configured in Preview mode.

In this mode, the call is presented to the agent, who decides whether or not to take the call.

- If the agent accepts the call, the communication with the customer is established.
- If the agent rejects it, or does nothing for a configurable period, he returns to available state and the call is distributed to someone else

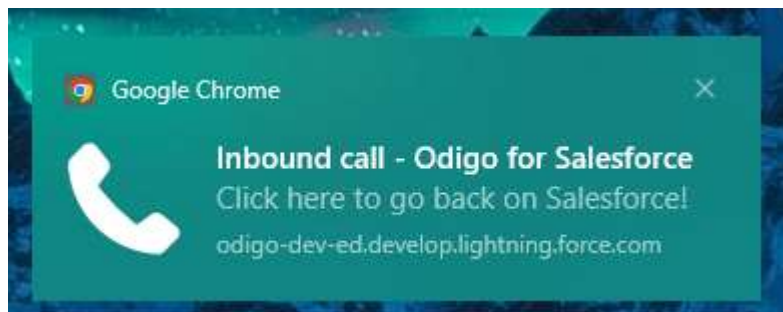


Note:

- It's possible to activate (or not) the contact information retrieval on preview.
- A countdown indicates the remaining time before the call is auto denied
- If the preview popup goes to the back, is closed or if the popup display is blocked by the browser, it's possible to display and to bring back it to the front by clicking on the button "Display preview popup"  at the top of the CTI.

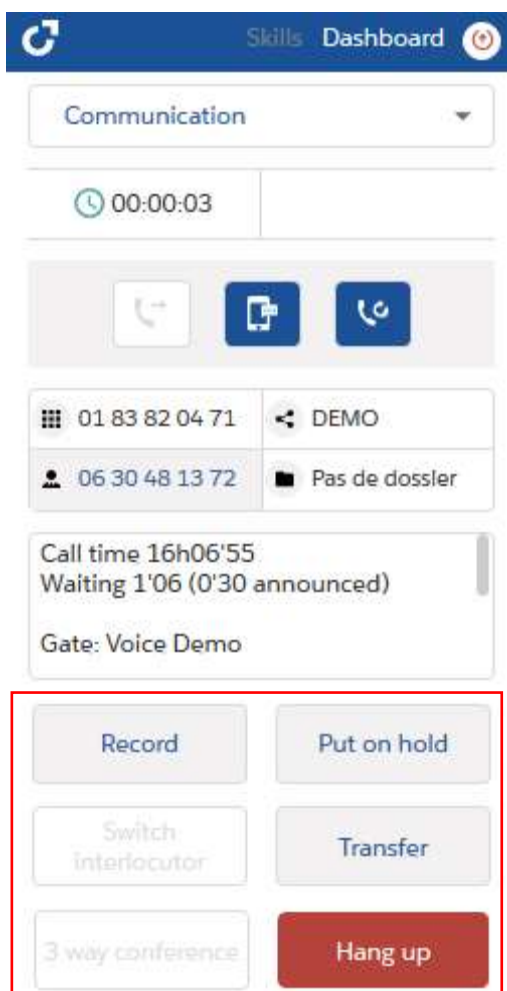


If the “Activate background activity notifications” option is activated in Odigo admin and the browser notification is authorized in the browser agent, when a call in preview mode is presented to an agent, a browser notification is displayed if the agent doesn’t have the Salesforce tab displayed on his screen. If he clicks on the notification, he comes back on the Salesforce tab.



2.7 Actions during a call

During an inbound or outbound call, the SALESFORCE user can do the following:

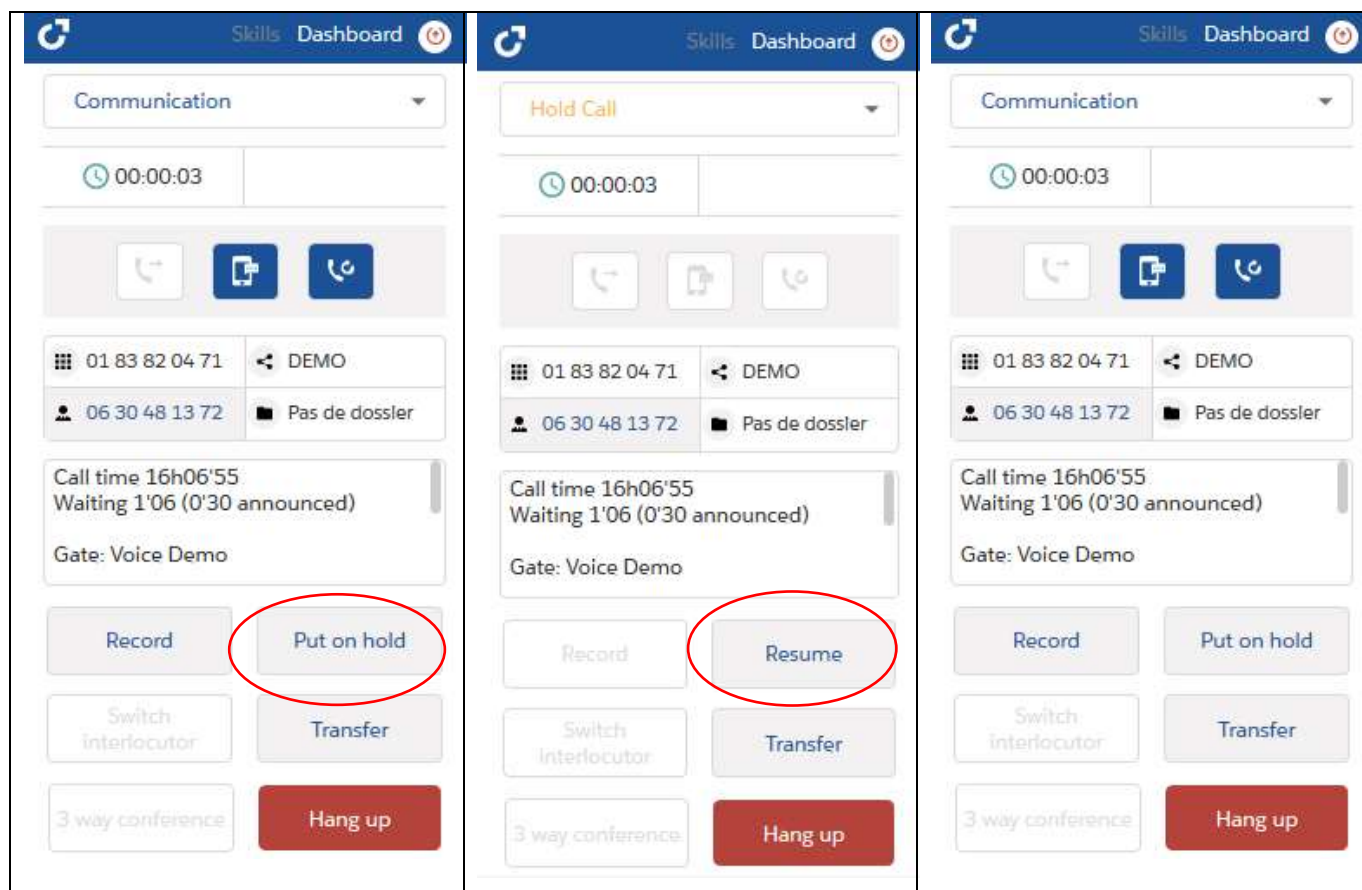


2.7.1 Hang up

To finish the call, the SALESFORCE user can either hang up their telephone or click on the "Hang up" button.

2.7.2 Put on hold

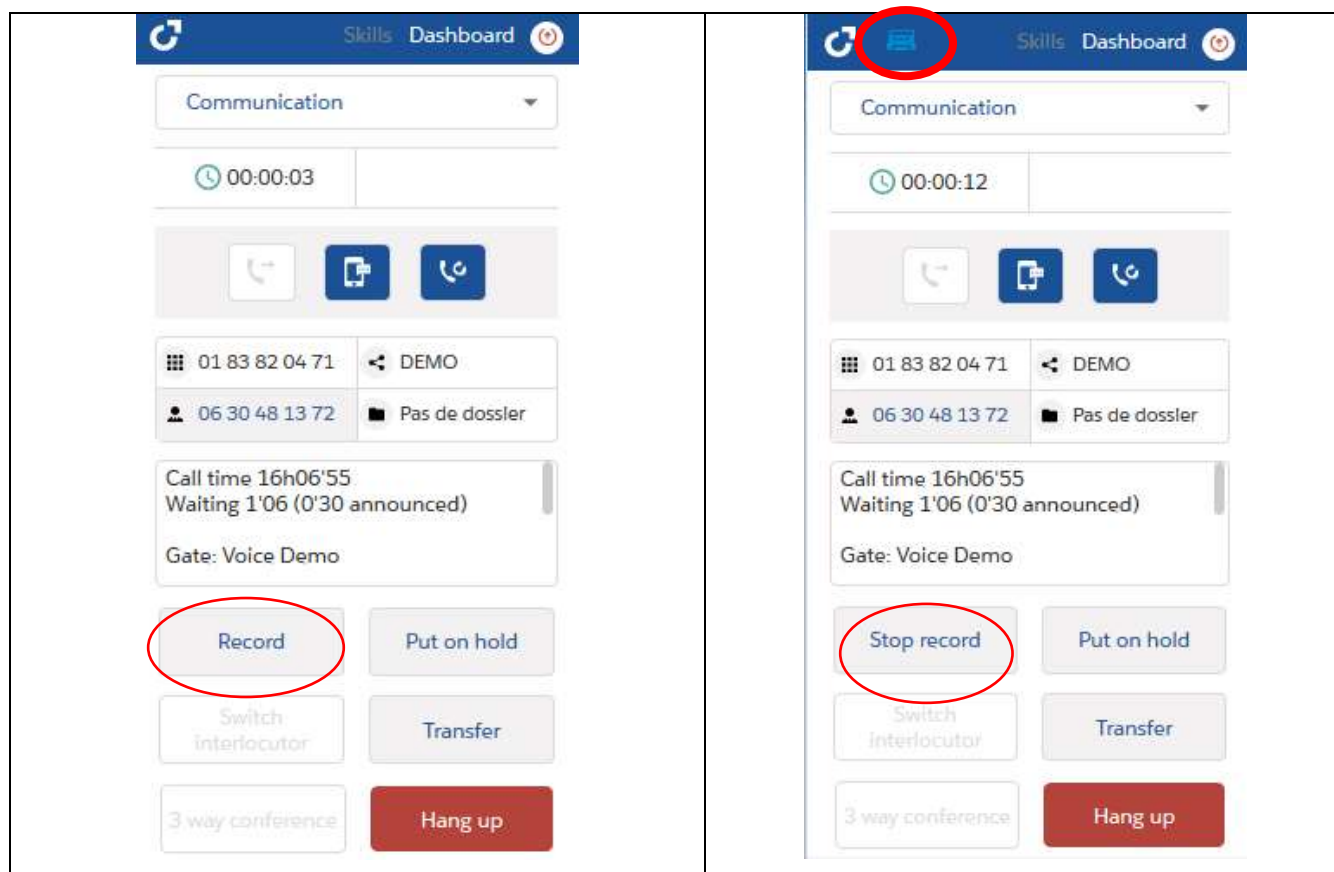
The SALESFORCE user can put the person they are talking to on hold by clicking the "Put on hold" button. The connector then appears as shown below.



While they're waiting, both customer and call center agent hear the music on hold.
Use the "Resume" button to continue their conversation with their customer.

2.7.3 Agent Recording [Update 5.0]

While talking to their customer, the agent can start recording the conversation by clicking the "Record" button:



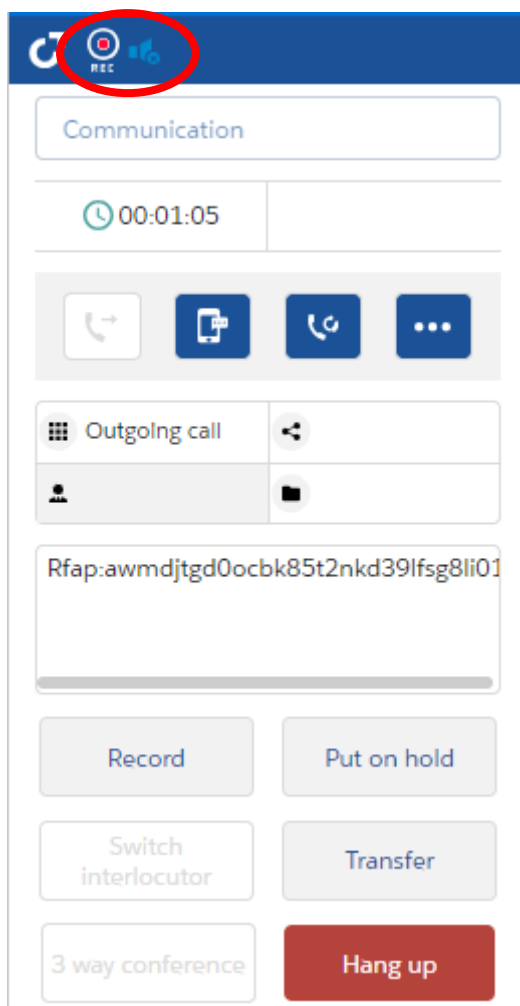
A Record icon is displayed at the top of the connector during the recording.

A "Stop Record" button is enabled to stop the recording if the option was checked in the ODIGO profile for the agent

The recording is sent by e-mail to the user (email address configured in Odigo) or sent to Odigo Record Servers depending on ODIGO configuration.

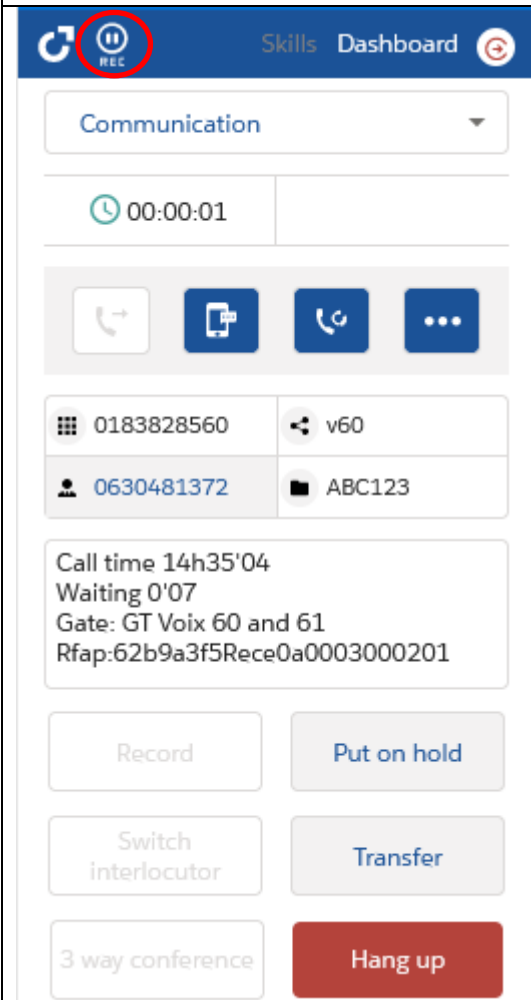
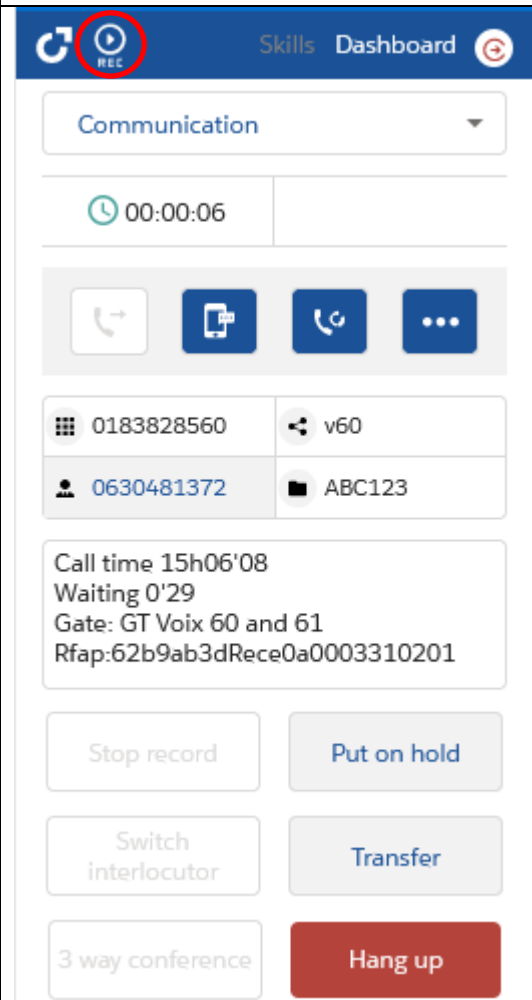
2.7.4 Recording and listening by the supervisor [Update 10.94]

During a recording and/or when a supervisor is listening to the agent, the following icons are displayed in the connector:



Notice: If your supervisor is recording you and you have the right to stop a recording, you can refuse this recording by clicking on "Customer doesn't want to be recorded" icon.

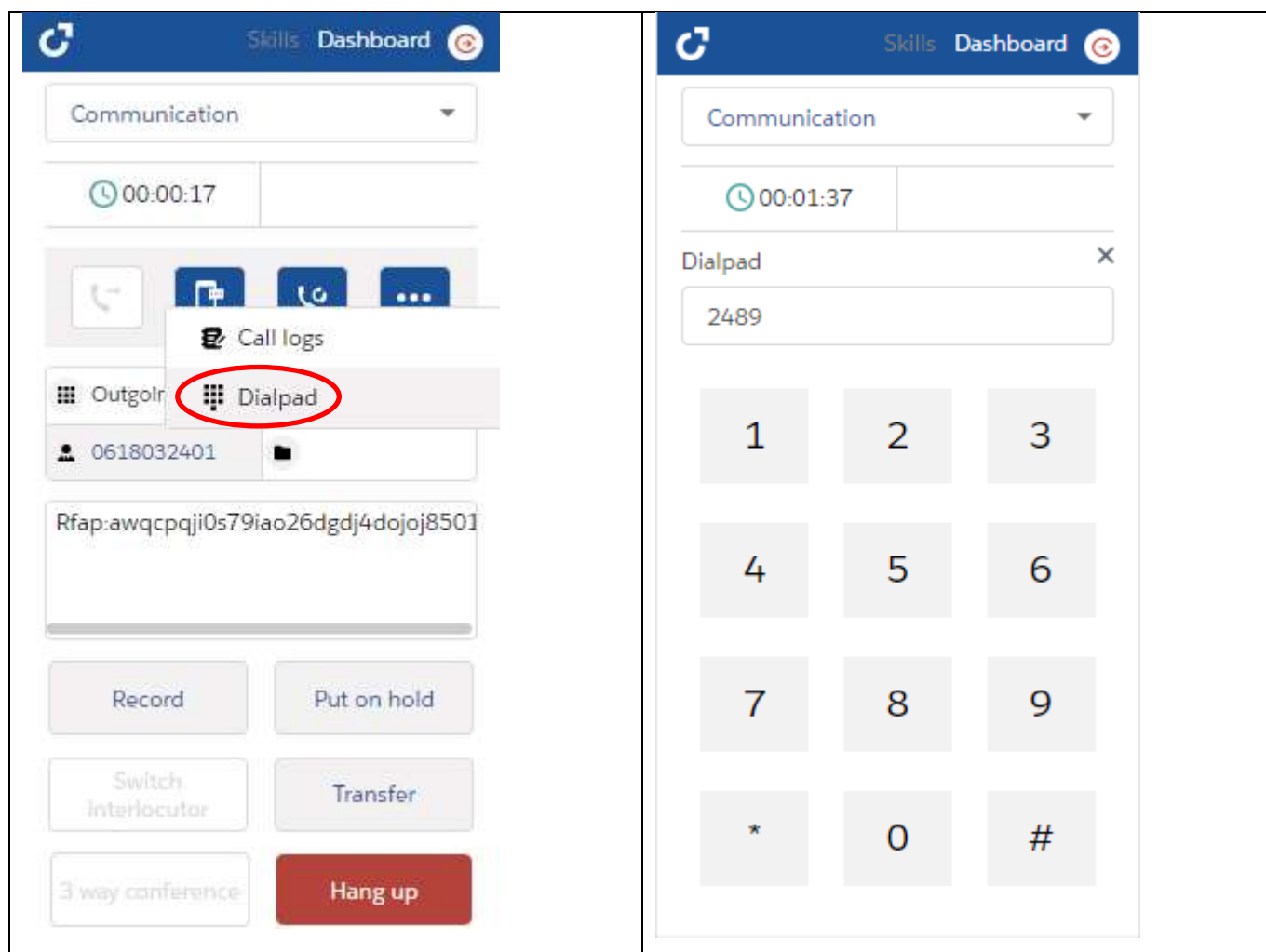
If you have Odigo 5.6 AND your Salesforce administrator has chosen the option “Replace Stop Supervisor Recording by Pause/Resume Supervisor Recording”, you can Pause and Resume the Supervisor Recording by clicking on the pictogram:

Supervisor Recording ON (Pause is Possible)	Supervisor Recording OFF (Resume is possible)
 The interface for Supervisor Recording ON shows a blue header bar with a 'REC' button circled in red. Below the header, there is a 'Communication' dropdown menu, a timer showing '00:00:01', and a row of four icons: a phone handset, a mobile phone, a speakerphone, and a three-dot menu. Below these icons are two rows of contact information: '0183828560 v60' and '0630481372 ABC123'. A call information box displays 'Call time 14h35'04', 'Waiting 0'07', 'Gate: GT Voix 60 and 61', and 'Rfap:62b9a3f5Rece0a0003000201'. At the bottom, there are three rows of buttons: 'Record' and 'Put on hold', 'Switch interlocutor' and 'Transfer', and '3 way conference' and 'Hang up'.	 The interface for Supervisor Recording OFF shows a blue header bar with a 'REC' button circled in red. Below the header, there is a 'Communication' dropdown menu, a timer showing '00:00:06', and a row of four icons: a phone handset, a mobile phone, a speakerphone, and a three-dot menu. Below these icons are two rows of contact information: '0183828560 v60' and '0630481372 ABC123'. A call information box displays 'Call time 15h06'08', 'Waiting 0'29', 'Gate: GT Voix 60 and 61', and 'Rfap:62b9ab3dRece0a0003310201'. At the bottom, there are three rows of buttons: 'Stop record' and 'Put on hold', 'Switch interlocutor' and 'Transfer', and '3 way conference' and 'Hang up'.

Note: You cannot start an Agent Record while the supervisor record is in Pause or Resume.

2.7.5 Send digits to an IVR [New 10.88]

If you are in a WebRTC call and need to send some digits to an IVR, you can use the dialpad available under the fourth button of the CTI.



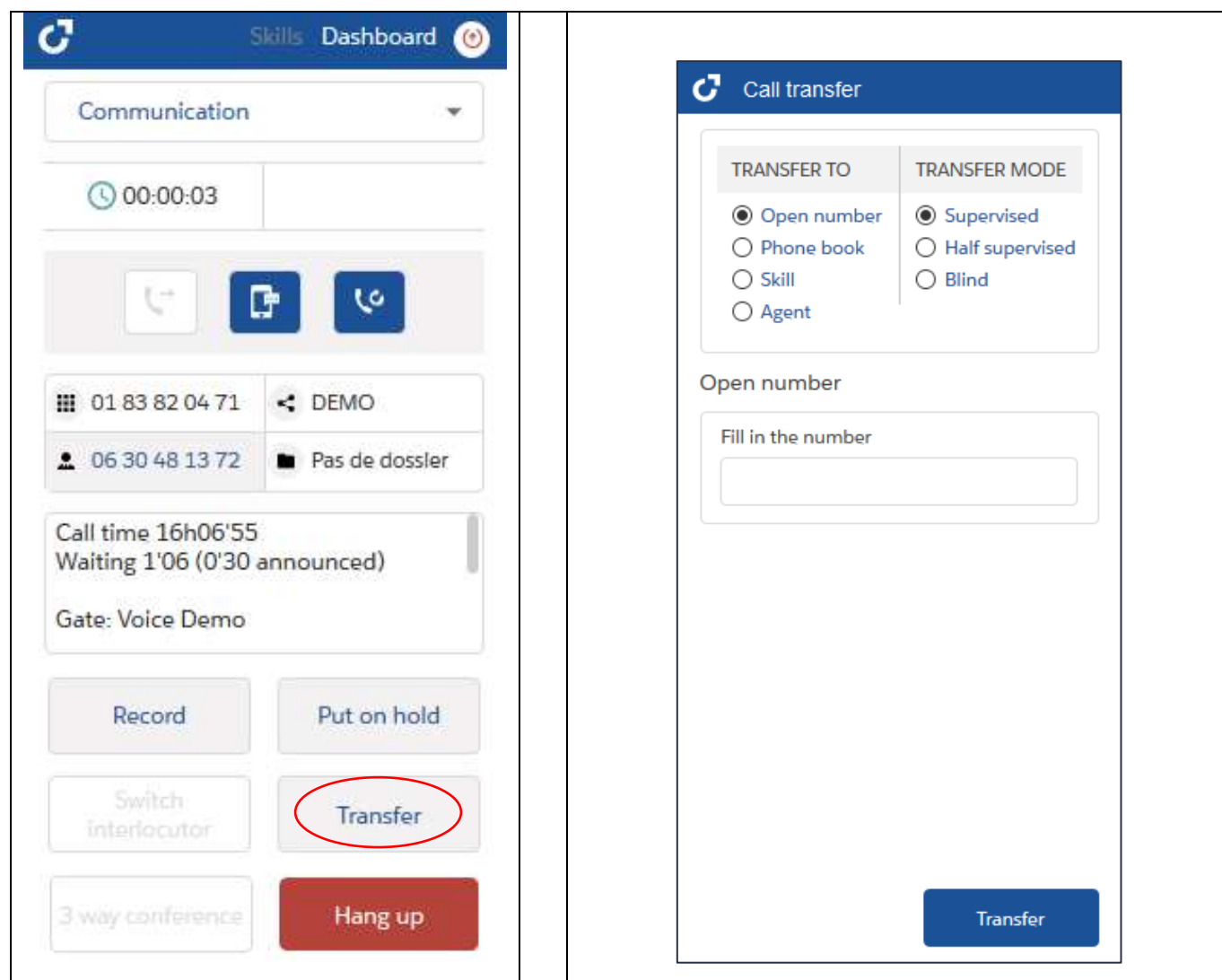
2.8 Transfer [Update 9.8]

For agents with transfer rights (rights configured in ODIGO), the "Transfer" button appears on their connector when they are in communication with a customer.

Note (Update 9.8): when the agent clicks on transfer button, the customer is automatically put on hold until the agent does the transfer or resume it.

2.8.1 Transferring to a free number

Whilst in communication with a customer, the user can transfer the call to a free number (no-one presents under ODIGO) by clicking the transfer button and entering the number:



Skills Dashboard

Communication

00:00:03

01 83 82 04 71

DEMO

06 30 48 13 72

Pas de dossier

Call time 16h06'55

Waiting 1'06 (0'30 announced)

Gate: Voice Demo

Record

Put on hold

Switch interlocutor

Transfer

3 way conference

Hang up

Call transfer

TRANSFER TO

☒ Open number
 ☐ Phone book
 ☐ Skill
 ☐ Agent

TRANSFER MODE

☒ Supervised
 ☐ Half supervised
 ☐ Blind

Open number

Fill in the number

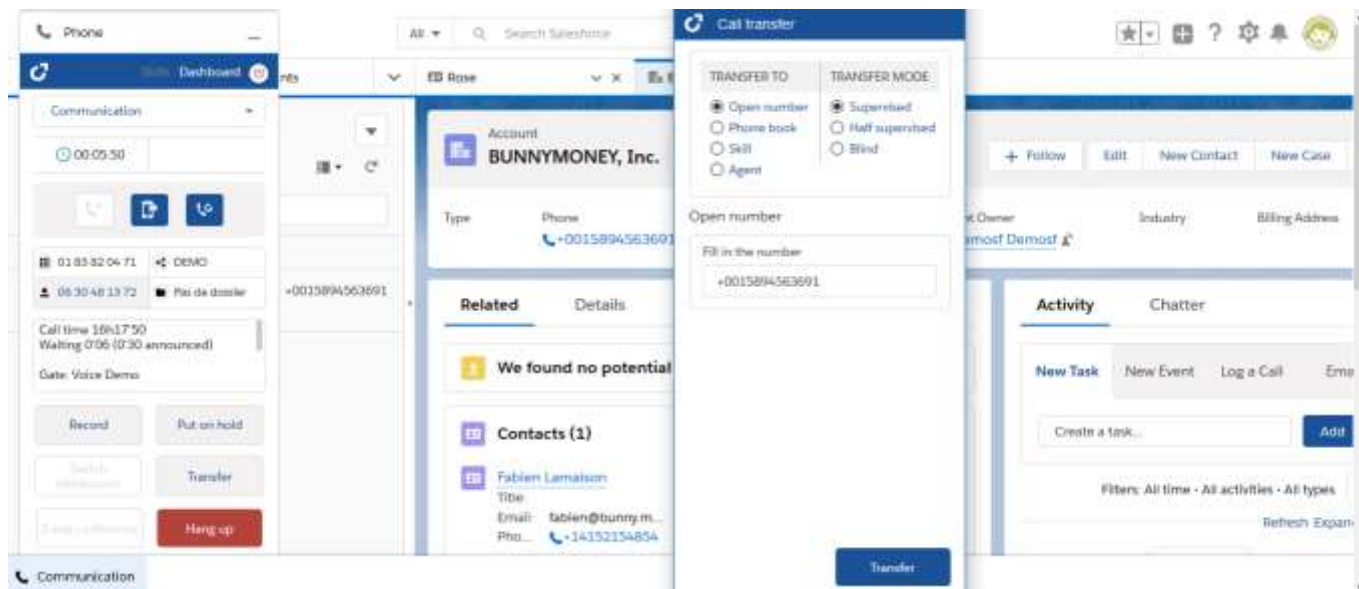
Transfer

The user who is transferring the call may at any time:

- Toggle between the customer and the number to which the call was transferred via one or more clicks on the "Switch interlocutor" button
- Initiate a 3-way conversation through the "3-way conference" button

2.8.2 Click to transfer [New 8.0]

If Click to transfer feature is activate in configuration, when you are in conversation with a customer you can click on a number and then the transfer windows will appear with external pre-filled number:

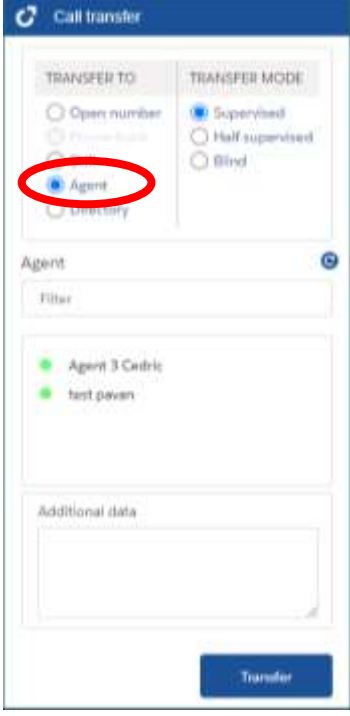
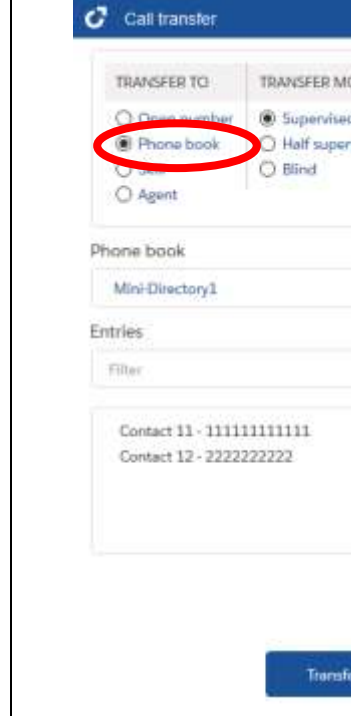
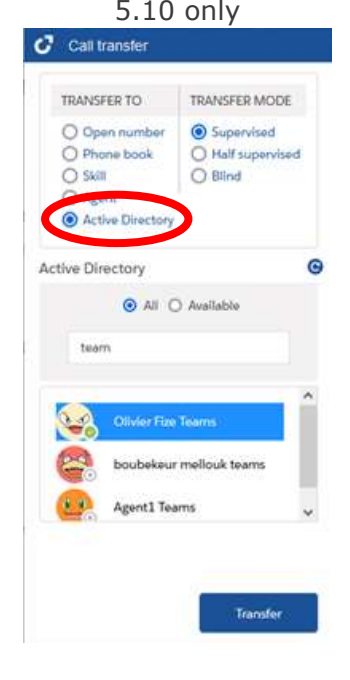
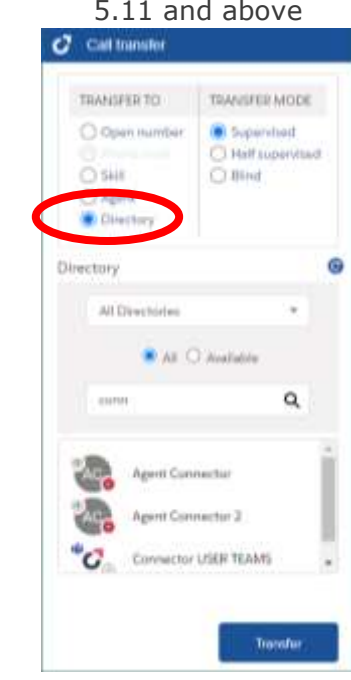


Then press transfer button to start it.

2.8.3 Transferring to a Skill/Agent/Mini directory/Active Directory or UCaaS [Update 10.90]

These modes are identical to the previous except that the agent is invited to select a skill, another agent last name and first name or a row in a directory, instead of entering a phone number.

Access to these transfer options complies with the transfer rights defined in the profile of the ODIGO user.

 Call transfer TRANSFER TO: ☐ Open number ☒ Agent ☐ Phone book ☐ Skill ☐ Directory TRANSFER MODE: ☒ Supervised ☐ Half supervised ☐ Blind Agent Filter Agent 3 Cedric test pavan Additional data Transfer	 Call transfer TRANSFER TO: ☐ Open number ☒ Skill ☐ Agent ☐ Directory TRANSFER MODE: ☒ Supervised ☐ Half supervised ☐ Blind Skills Filter Skill 163 (0 com / 0 wait) Additional data Transfer	 Call transfer TRANSFER TO: ☐ Open number ☒ Phone book ☐ Agent TRANSFER MODE: ☒ Supervised ☐ Half supervised ☐ Blind Phone book Mini-Directory1 Entries Filter Contact 11 - 111111111111 Contact 12 - 2222222222 Transfer
5.10 only  Call transfer TRANSFER TO: ☐ Open number ☐ Phone book ☐ Skill ☒ Active Directory TRANSFER MODE: ☒ Supervised ☐ Half supervised ☐ Blind Active Directory ☒ All ☐ Available team Olivier Fze Teams boubekur mellouk teams Agent1 Teams Transfer	5.11 and above  Call transfer TRANSFER TO: ☐ Open number ☐ Phone book ☐ Skill ☒ Directory TRANSFER MODE: ☒ Supervised ☐ Half supervised ☐ Blind Directory All Directories ☒ All ☐ Available Agent Connector Agent Connector 2 Connector USER TEAMS Transfer	

Notes:

1) Skills and agent's availability is displayed through colors.

- Dynamic routing not enabled for the gate
 - Green if at least one agent is available for this gate
 - Red otherwise, with the number of communications in progress between parentheses and the number of calls waiting on the gate



- Dynamic routing enabled for the gate
 - **Green** if no waiting call for this gate
 - **Red** otherwise, with the number of communications in progress between parentheses and the number of calls waiting on the gate

2) Agents can initiate a transfer call to an active directory or UcaaS user. Active Directory or UCaaS search results are Display Name, Photo and Presence (If known)

- This search is only Available with Odigo 5.10+ version
- Search on Azure Directory only in 5.10, on UCaaS (MS Teams, RingCentral) from 5.11+ version
- You need to enter almost 3 characters of the name to launch search
- Result is limited to 10 persons
- Transfer on MS Teams users can be done with the Direct Routing solution if the search filters are configured with the Direct Routing dialing mode from the 5.11+ version

2.8.4 Transfer modes

Three call-transfer modes are available.

2.8.4.1 Supervised transfer

During the call transfer, you connect to the second agent. The 2nd agent will take the customer's call, once you 1st agent, hang up. The second agent is then automatically connected to the customer. If the second agent hangs up, the customer is automatically returned to you.

When you are connected to the second agent, you may make the call consultative or switch to a 3-way conference with the customer.

Once you have switched to 3-way conference, it is no longer possible to make the call consultative or take it back.

2.8.4.2 Semi-supervised transfer

During a semi-supervised transfer, you cannot connect to the second agent, you have to wait until the customer is accepted (second agent picks up or queued in ODIGO). If a failure occurs, customer's call comes back to you.

2.8.4.3 Blind transfer

During a blind transfer, you are freed immediately. If a failure occurs, the customer will be deterred.

2.8.5 Using the "Additional data" field

When initiating the transfer, the first agent may enter data to be displayed on the second agent's connector:

Call transfer

TRANSFER TO

☐ Open number
 ☐ Phone book
 ☐ Skill
 ☒ Agent

TRANSFER MODE

☒ Supervised
 ☐ Half supervised
 ☐ Blind

Agent

Filter

Agent Morgane

Additional data

This is the context

Transfer

Skills Dashboard

Communication

00:00:44

→

↔

↶

01 83 82 04 71

DEMO

06 30 48 13 72

Pas de dossier

Call time 17h14'51

This is the context

Transfer1: Voice Demo (Agent Olivier)

Data: Voice Demo

Rfan:5c507b9dDemi0w0001910602

Record

Resume

Switch interlocutor

Transfer

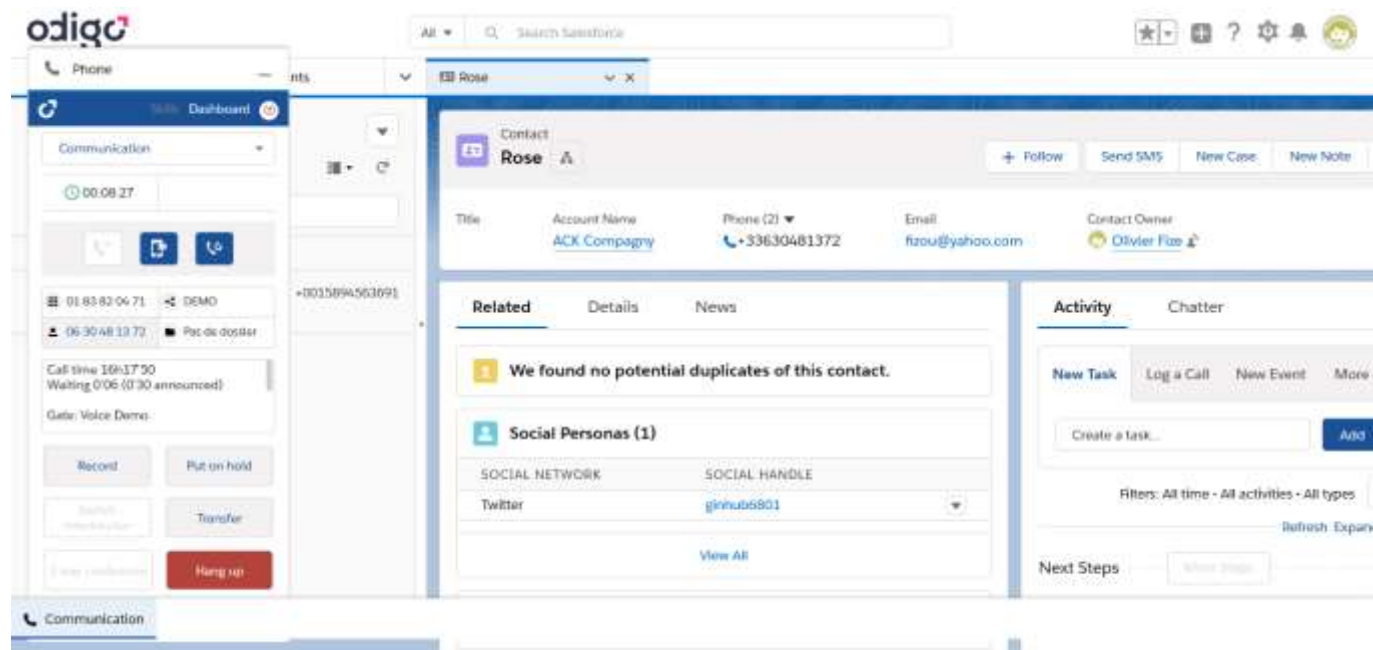
3 way conference

Hang up

Note: The additional data is also saved post-call in the activity of the agent who initiated the transfer.

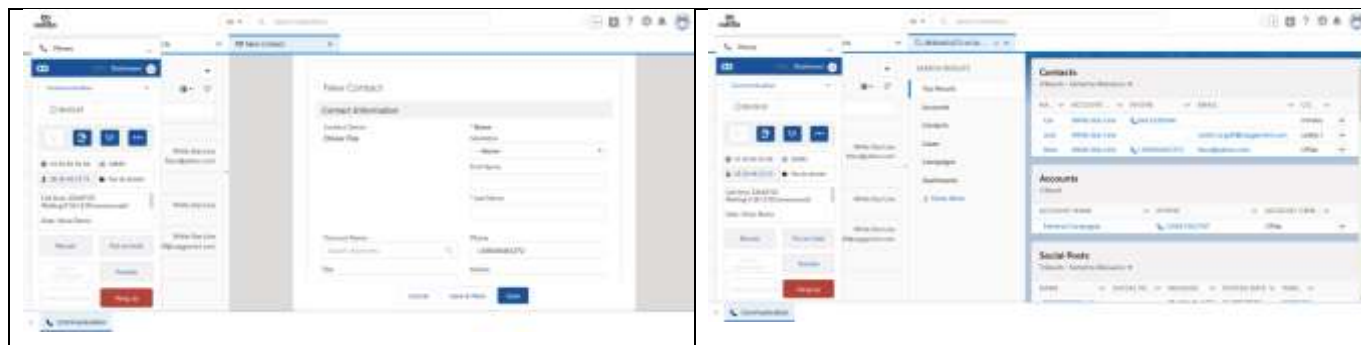
2.9 Displaying a contact, case, opportunity, page, based on phone number

A record (contact, case, opportunity etc.) related to a caller's number, appears on an inbound call or on a callback campaign during the "Alerting" event.



According to the configured rules for displaying records set by your Salesforce admin (see installation guide), the following information may also be displayed:

- New contact in the event of an unknown telephone number
- List of contacts if the number relates to more than one



2.10 Creating an activity

An activity is automatically created and attached to the last SALESFORCE object viewed once the call is over.

This activity is then made available to the agent who can change the data on it or attach it.

The screenshot displays the Odigo interface for a call activity. At the top, there's a navigation bar with 'Contact Center', 'Odigo Configuration', and 'Olivier Fize'. Below this, a task titled 'Call back of the 2020/07/28 at 12:03' is shown with buttons for 'Follow', 'Completed', 'Edit Comments', 'Change Date', and 'Create Follow-Up Task'. The main section is divided into 'Details', 'Related', and 'Chatter' tabs. The 'Details' tab is active, showing a form with various fields. The 'Subject' is 'Call back of the 2020/07/28 at 12:03'. The 'Name' field is 'Olivier Fize'. The 'Type' is 'Call' and 'Call Type' is 'Outbound'. The 'ODIGO Information' section includes 'Call type' (Call back), 'Call start time' (28/07/2020 12:03), 'Call end time' (28/07/2020 12:03), 'Call duration' (00:00:01), 'Call ID' (5486c18e1e0d3a0002000101), 'Phone number' (+33467161767), 'IVR Number', 'Skill' (comp13), and 'Waiting time'. The 'Campaign' is 'Folder III'. The 'Call result' is 'Survey name'. The 'Survey information' section includes 'Survey score'. The 'Odigo Record' section shows a play button and a duration of 0:12 / 7:20. At the bottom, there's a link to 'Other Informations'.

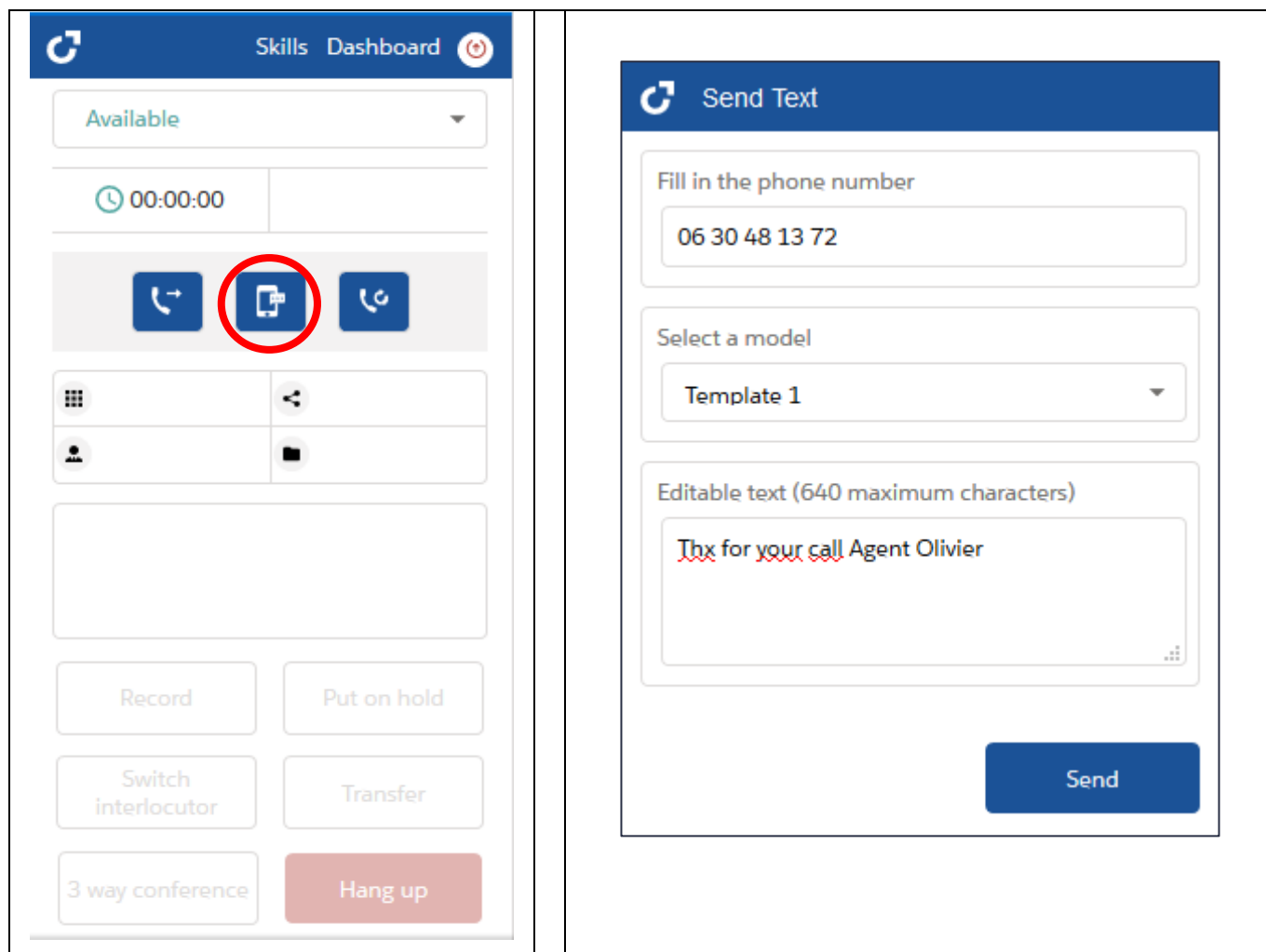
Note:

- The ODIGO fields for the activity are automatically pre-entered by the connector depending on the call context.
- The "Name" field can only be related to these objects: "Contact" or Lead
- The "Related to" field has been verified for these objects: "Account", "Campaign", "Case", "Opportunity", "Product"

2.11 Send Text Messages [Update 11.5]

This feature requires use of ODIGO 3.4. The agent must be authorized in ODIGO to send Text.

To do this, click on the "Send Text" icon, then enter the message to be sent and click "send" button:



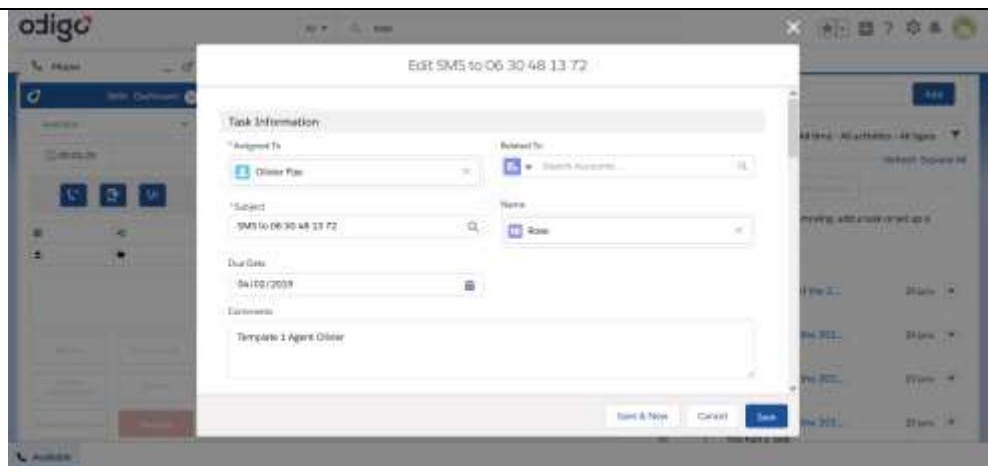
The screenshot displays the ODIGO interface for sending text messages. On the left, the 'Skills Dashboard' shows various call control buttons. The 'Send Text' icon, represented by a document with an arrow, is highlighted with a red circle. On the right, the 'Send Text' form is shown, featuring a header bar with the ODIGO logo and the title 'Send Text'. The form includes a 'Fill in the phone number' field with the pre-entered number '06 30 48 13 72', a 'Select a model' dropdown menu set to 'Template 1', and an 'Editable text (640 maximum characters)' area containing the text 'Thx for your call Agent Olivier'. A 'Send' button is located at the bottom right of the form.

The telephone number is pre-entered with the number of the last call or that in progress.

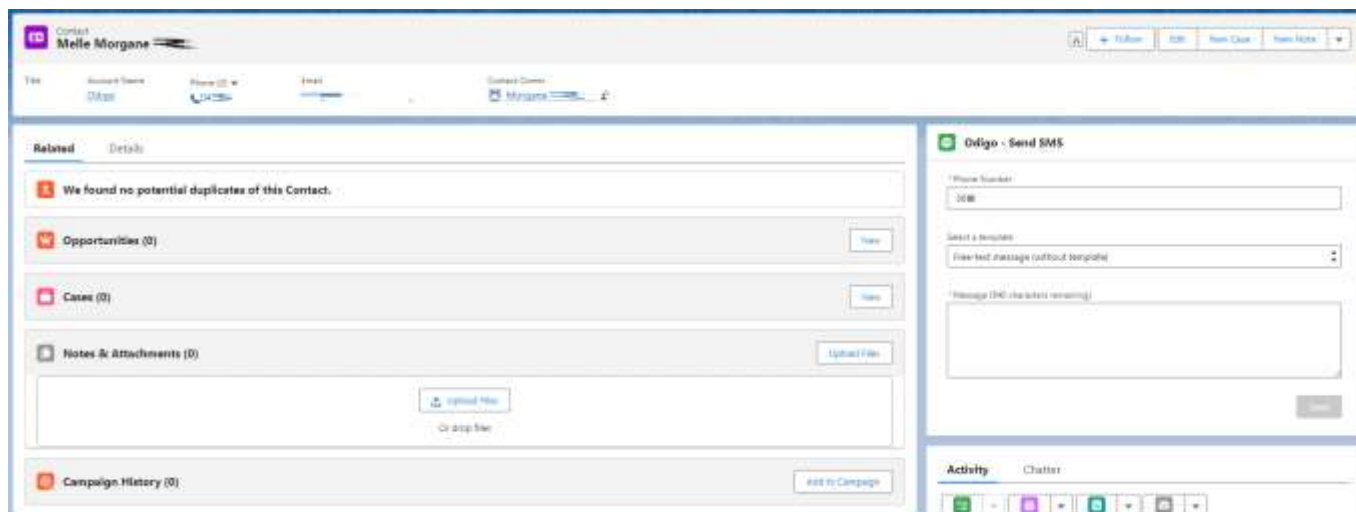
You can select a ODIGO Text Message template to pre-enter some text. The variables in these templates are replaced automatically by the following data from the last call or that in progress:

- Gate: #GATE_LABEL#
- The agent's name: #AGENT_NAME#
- The caller's number: CDDI #CALLER_DDI#
- File number #FILE_NUMBER#
- IVR number: SDDI #SERVICE_DDI#
- The agent's first name: #AGENT_FIRSTNAME#
- Rows from the connector: #OPTIONAL_DATA_1#, #OPTIONAL_DATA_2#, ...

Note: A SMS activity is automatically created with the text of Message as comment.
Like call activities, it is automatically associated to the record displayed behind at the time the Text Message was sent.



You also can send SMS by the “Odigo – Send SMS” component, if your Salesforce administrator added it in a record page like the Contact record page.



The phone number is automatically filled in by the phone numbers found in the Contact page, in this order of priority: mobile phone, phone, home phone, other phone and assistant phone.

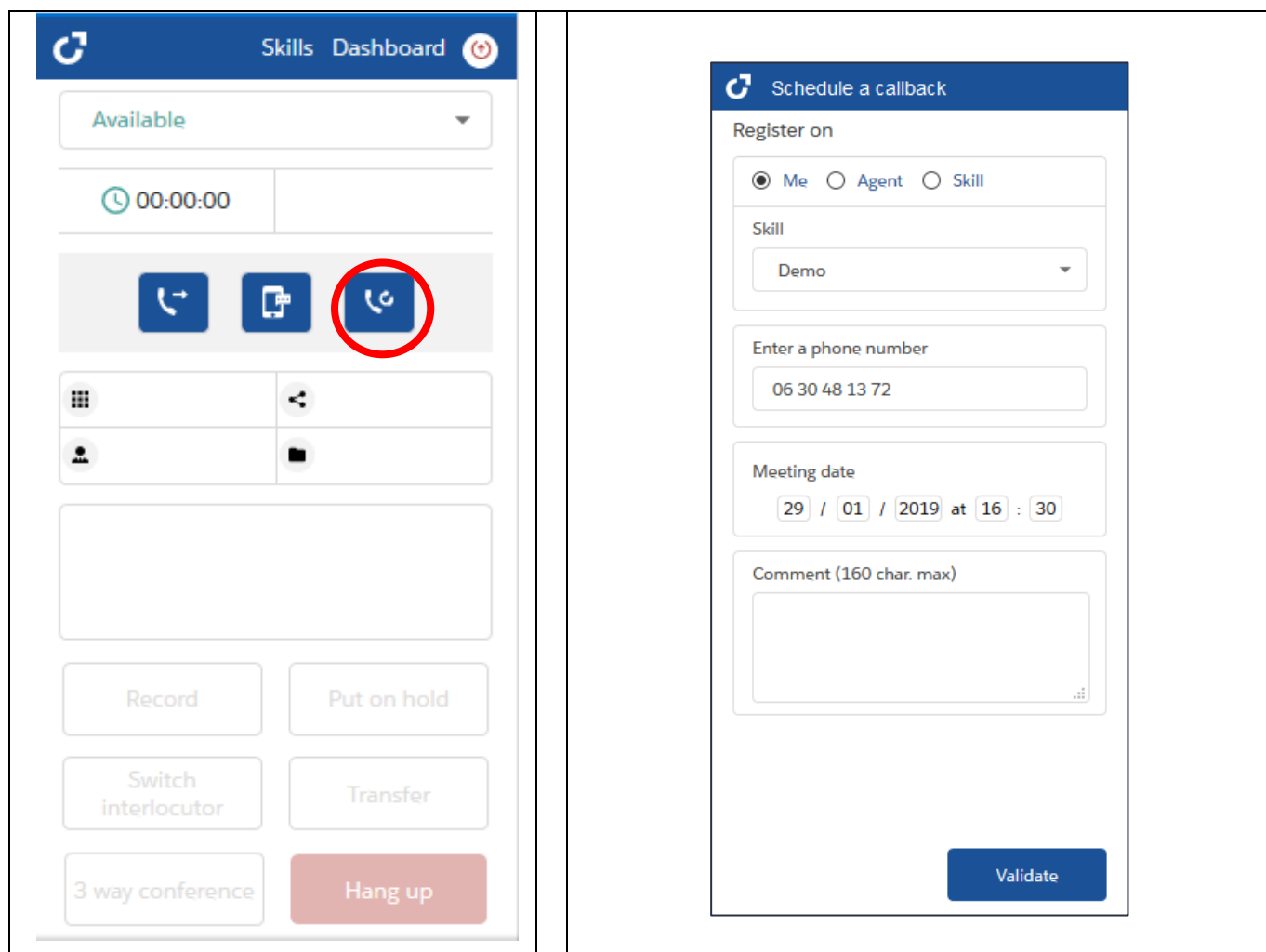
You can use templates to pre-enter some text, but it doesn't use the Odigo SMS templates, it is the Salesforce Classic Email Templates configured by your Salesforce Administrator (see Admin User Guide for more information).

2.12 Schedule a callback

This feature requires ODIGO 3.4 version. The agent must be allowed to schedule a callback in ODIGO.

To do this, click on the "Schedule a callback" icon, then select or enter:

- The agent who will make the call back: Me, another agent or an agent whose got a particular skill
- The telephone number is pre-entered with the number of the last call or that in progress.
- The schedule date of the start of call back
- A free text that will be display on agent CTI connector when he will do the call back



The image shows two side-by-side screenshots from the ODIGO interface. The left screenshot is the 'Skills Dashboard' with a status dropdown set to 'Available' and a timer at '00:00:00'. A row of three call-related icons is visible, with the third icon (a phone handset with a circular arrow) circled in red. Below this are icons for a grid, a share icon, a person, and a folder. At the bottom are buttons for 'Record', 'Put on hold', 'Switch interlocutor', 'Transfer', '3 way conference', and 'Hang up'. The right screenshot is the 'Schedule a callback' form. It has a header 'Register on' with radio buttons for 'Me' (selected), 'Agent', and 'Skill'. Below is a 'Skill' dropdown menu showing 'Demo'. Then is a field 'Enter a phone number' with the value '06 30 48 13 72'. Next is a 'Meeting date' field showing '29 / 01 / 2019 at 16 : 30'. Below that is a 'Comment (160 char. max)' text area. At the bottom right is a 'Validate' button.

The call-back is automatically executed by ODIGO at the date and time indicated. If no agent is available, the call-back is stored until an agent connects or the call-back expires (see ODIGO gate configuration for more information).

If the option is activated in the configuration, an event will be created in the SALESFORCE calendar. This event will be linked to the contact record.

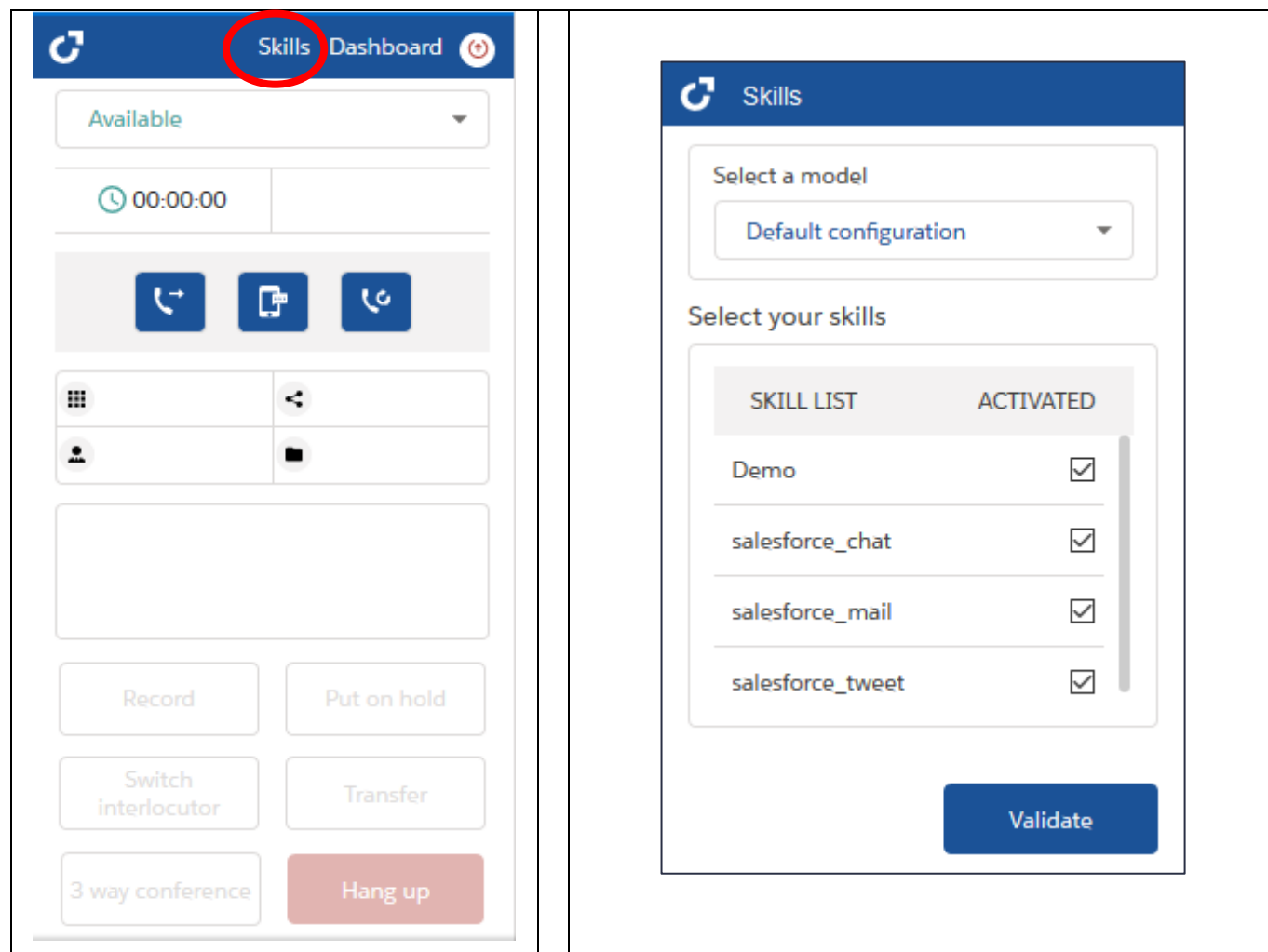
2.13 Changing skill/template or WebRTC sound options [Update 10.88]

2.13.1 Changing skill or template

This feature requires the use of ODIGO 3.4 and the agent must be authorized in ODIGO to change his skills or template.

Depending on the call center situation (detering, waiting time too long, etc.), the agent may need to change skill in order to join or leave a gate.

To do this, click the "Skill" link, select or deselect the skills/template in the pop-up displayed, then click on "validate":



The change is considered immediately. The agent will then receive calls related to his new skills /template.

Note: the skill level will be displayed only if previously configured in ODIGO.

2.13.2 Changing WebRTC sound options [New 10.88]

When the agent is in WebRTC telephony mode, and the "Allow agents to modify their WebRTC sound options" option in Salesforce package configuration is enabled, the agent can change his WebRTC sound options from the "Skills" popup.

The modifications are taken in account for the next call.

 Skills Dashboard 

Available ▾

00:00:00







Record

Put on hold

Switch interlocutor

Transfer

3 way conference

Hang up

 Skills

Select a model

Default Configuration ▾

SKILLS

CAMPAIGN

WEBRTC 

 Par défaut - External Mic (Realte ▾

 Par défaut - Realtek HD Audio 2t ▾

☐ Play ringtone on separate device

 Par défaut - Realtek HD Audio 2t ▾

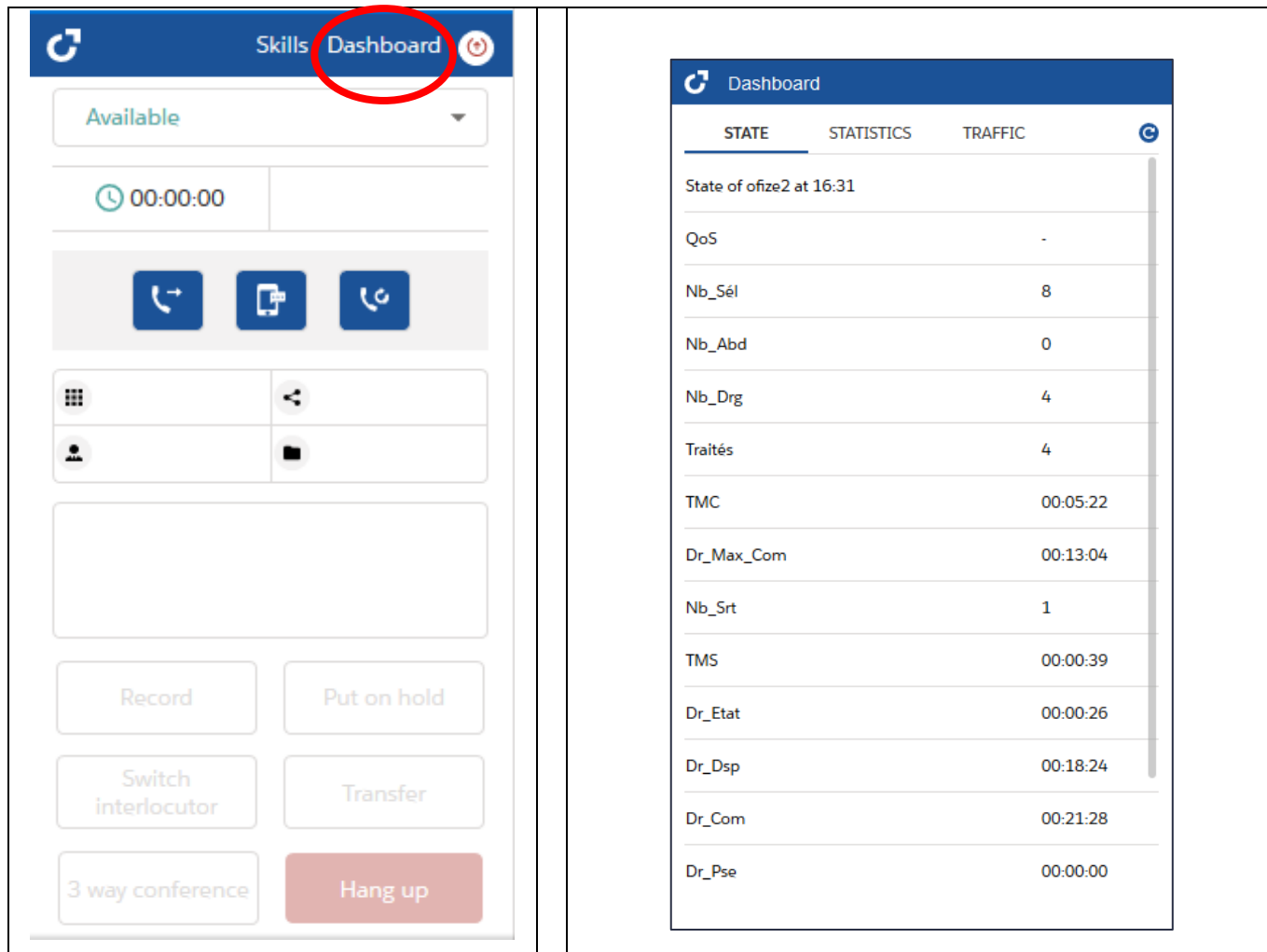
Validate

50

2.14 Agent Supervision and Statistics

This feature requires the use of ODIGO 3.4 and the agent must be authorized in ODIGO to display the supervision of his status, traffic or statistics.

To do this, click on the "supervision" link. A pop-up appears:



STATE	STATISTICS	TRAFFIC
State of ofize2 at 16:31		
QoS	-	
Nb_Sel	8	
Nb_Abd	0	
Nb_Drg	4	
Traités	4	
TMC		00:05:22
Dr_Max_Com		00:13:04
Nb_Srt	1	
TMS		00:00:39
Dr_Etat		00:00:26
Dr_Dsp		00:18:24
Dr_Com		00:21:28
Dr_Pse		00:00:00

The above screen displays the supervision measurements for the agent from the beginning of the day. You can also, depending on the agent rights in ODIGO, access the following tabs:

- Instantaneous supervision of the traffic according to the skill:

Dashboard																
STATE			STATISTICS			TRAFFIC										
Name	null	NbRcEnt	NbRcDéb	NbRcTrf	NbDéb	NbAbd	NbDis	NbTrait	TMC	NbDemTrf	NbAtt	CrAtt	CrLog	CrDsp	CrIntGrde	CrWrp
Voice Demo	0	5	0	0	0	0	0	5	00:04:18	0	1	0	2	2	0	0

- Statistical measurements by period (Year, Month, Week and Day)

Dashboard

STATE

STATISTICS

TRAFFIC

Select a day, a week

January 2019

Week	Su	Mo	Tu	We	Th	Fr	Sa
1	30	31	1	2	3	4	5
2	6	7	8	9	10	11	12
3	13	14	15	16	17	18	19
4	20	21	22	23	24	25	26
5	27	28	29	30	31	1	2
6	3	4	5	6	7	8	9

A month

January

A year

2019

Display statistics :

Global

Details

Include zero values

Validate

Dashboard

Agent stats of skill2 Agent 01/01/2018 to 31/12/2018

Previous year

Next year

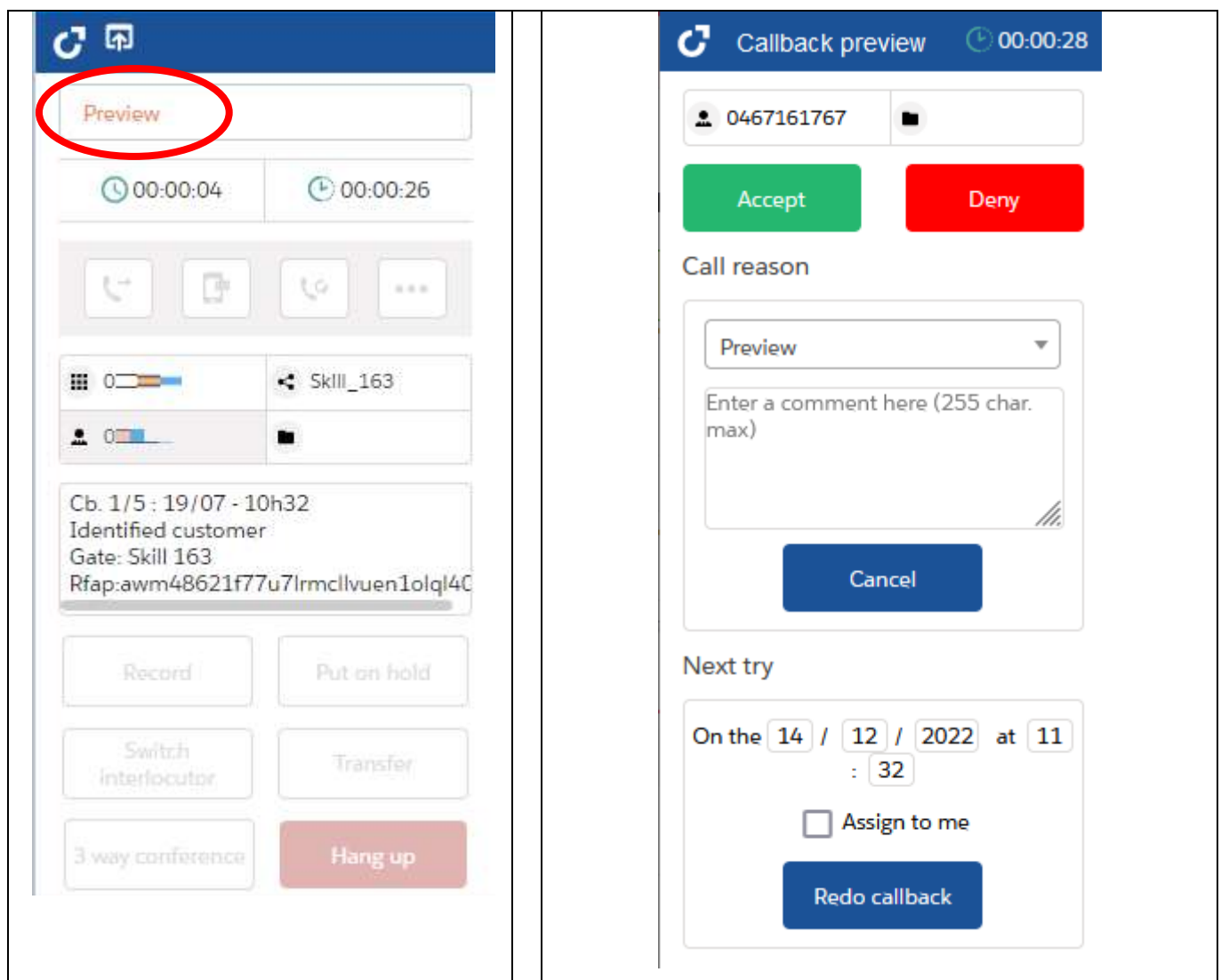
	January	February	March	April	May	June	July	August	September	October	November	December	Total
Selection agent	-	-	-	-	-	-	-	-	-	-	-	-	-
Abandon client	-	-	-	-	-	-	-	-	-	-	-	-	-
QoS	-	-	-	-	-	-	-	-	-	-	-	-	-
Dévolement/Refus apt	-	-	-	-	-	-	-	-	-	-	-	-	-
- Dévolement	-	-	-	-	-	-	-	-	-	-	-	-	-
- Refus	-	-	-	-	-	-	-	-	-	-	-	-	-
- Occupation agent	-	-	-	-	-	-	-	-	-	-	-	-	-
Course de dévolement	-	-	-	-	-	-	-	-	-	-	-	-	-
Décroché x Siles	-	-	-	-	-	-	-	8	3	-	-	5	34
Décroché x Siles	-	-	-	-	-	-	-	3	-	-	1	-	4
Course totale décroché	-	-	-	-	-	-	-	00:01:28	00:00:17	00:00:11	00:00:32	00:02:27	-
Totals	-	-	-	-	-	-	-	-	-	-	-	-	-

2.15 Callback in Preview mode [Update 11.4]

This feature requires the ODIGO gate or Odigo Campaign have been configured in *preview mode* and the agent is authorized to make callbacks.

In this mode, the callback is presented to the agent, who decides whether or not to take the call.

- If the agent accepts the callback or does nothing for a period of time, the customer's callback is triggered.
- If the agent rejects it, he returns to available status and the callback is distributed to someone else.
- If the agent cancels it, he returns to available status and the callback is removed from Odigo. Note: On New Odigo Campaign (Version 5.4) a qualification motif and a comment can be indicated.
- If the agent reschedules it, he returns to available status and the callback is rescheduled at the chosen time (Eventually on the same agent if it is indicated)



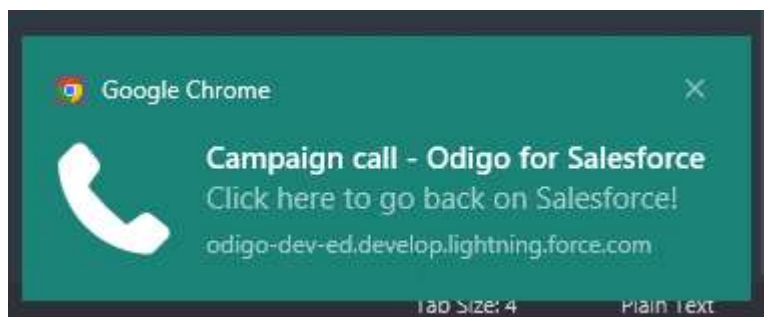
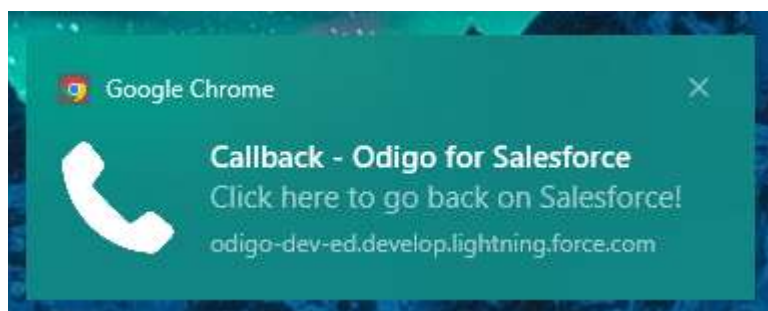
The image displays two screenshots of the Odigo interface. The left screenshot shows a sidebar menu with the 'Preview' button highlighted by a red circle. The right screenshot shows the 'Callback preview' screen. It includes a header with 'Callback preview' and a timer '00:00:28'. Below the header, there is a field for the phone number '0467161767'. There are two buttons: 'Accept' (green) and 'Deny' (red). Below these is a 'Call reason' section with a dropdown menu set to 'Preview' and a text area for a comment (255 characters max). A 'Cancel' button is below the comment area. The 'Next try' section shows a date picker set to 'On the 14 / 12 / 2022 at 11 : 32'. There is a checkbox for 'Assign to me' and a 'Redo callback' button.

Note:

- Cancel and Redo button can be hide depending on your profile parameter by your supervisor.

- A countdown indicates the remaining time before the callback will be auto launch
- No ringtone on the preview for Callback and Outbound Campaign calls
- If the preview popup goes to the back, is closed or if the popup display is blocked by the browser, it's possible to display and to bring back it to the front by clicking on the button "Display preview popup"  at the top of the CTI.

If the "Activate background activity notifications" option is activated in Odigo admin and the browser notification is authorized in the browser agent, when a call in preview mode is presented to an agent, a browser notification is displayed if the agent doesn't have the Salesforce tab displayed on his screen. If he clicks on the notification, he comes back on the Salesforce tab.



2.16 WebRTC Manuel / Automatic Pick up [Update 10.83]

This feature requires WEBRTC option to be activated by your Salesforce Administrator AND in your Odigo Profile.

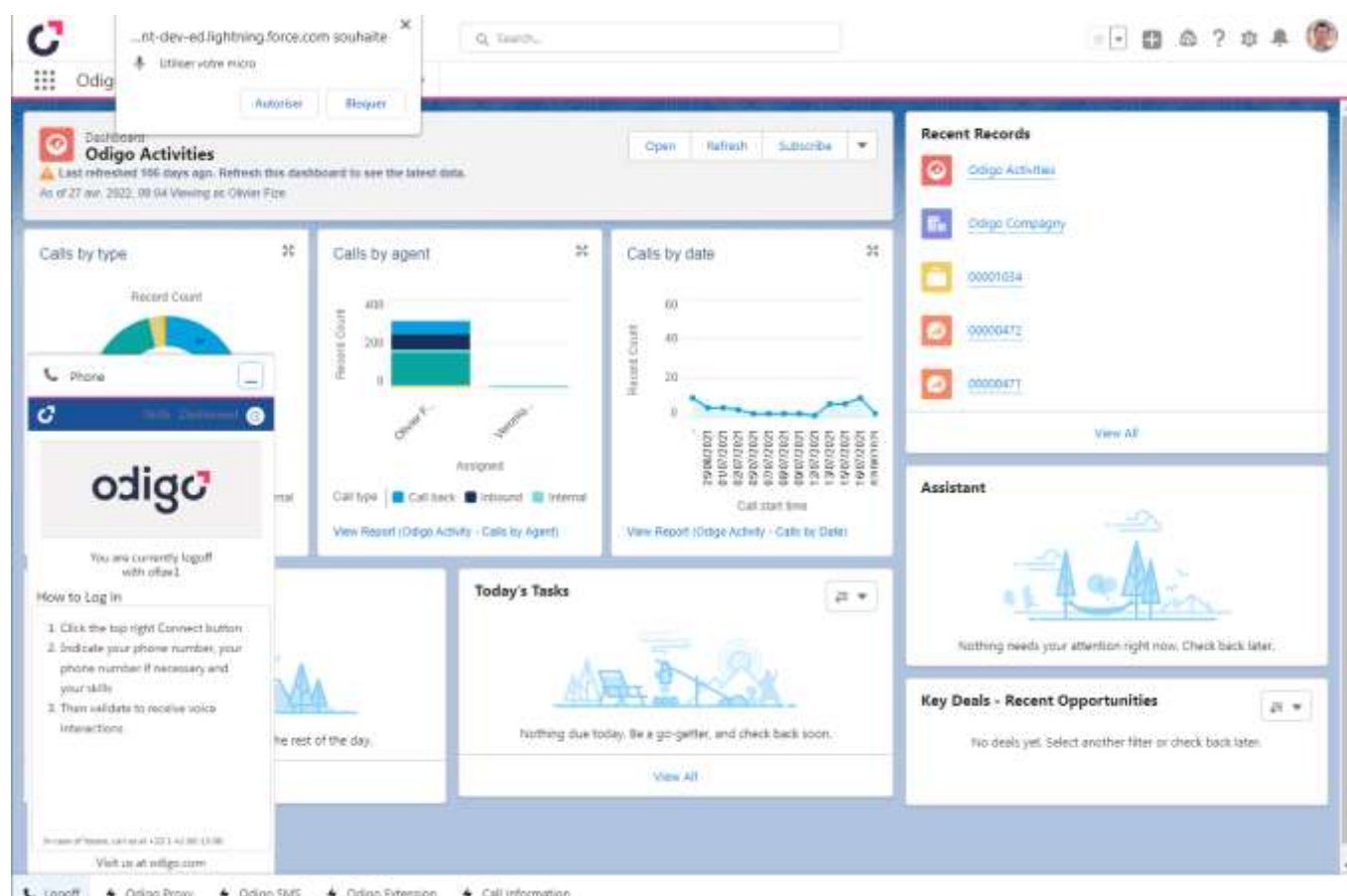
Important:

- WebRTC feature is only compatible with Chrome
- Never open two browsers or two browser tabs on Salesforce application
- Do not close browser or tab during communication

Two types of pick-up mode exist, depending on your Salesforce Administrator configuration:

2.16.1 Auto pick up mode

No action is required from agent to pick up a call.



However, he must authorize the use of his microphone to Salesforce site before login.

2.16.2 Manual pick up mode [Update 12.1]

A Ring tone is played. Agent must indicate if he accepts or refuses the call.



The screenshot displays the Odigo Console interface. On the left, there's a sidebar with 'Search Results' showing 'Contacts: 2', 'Tasks: 5+', and 'Cases: 0'. Below this is a 'Phone' section with a 'Preview' button and a 'Call' button. The main area shows 'Tasks' with a table of results. A 'Preview Inbound' pop-up is visible over the tasks table, showing a search bar with '0630481372' and 'Accept'/'Deny' buttons. The tasks table has columns: SUBJECT, NAME, RELATED TO, DUE DATE, and ASSIGNED ALIAS. Below the table is a message: 'Don't see your result? We searched the objects you use most, but we didn't search everything. Know which object you're looking for? Select it in the dropdown next to the search box, or in the sidebar.'

SUBJECT	NAME	RELATED TO	DUE DATE	ASSIGNED ALIAS
SMS to 0630481372			16/02/2022	OFire
SMS to 0630481372	Oliver Fire		16/02/2022	OFire
SMS to 0630481372			16/02/2022	OFire
SMS to 0630481372	Oliver Fire		14/02/2022	OFire
SMS to 0630481372			14/02/2022	OFire

Of course, he must authorize the use of his microphone to Salesforce site And Pop up

Note: In case of network issues, warning and error message are displayed in toaster. The reconnection is automatic to all available servers, except for when the CSTParamater "enableWebrtcConsoleMonoFreeswitch" is enabled. In this case, the agent needs to disconnect and refresh his tab to be able to connect to another freeswitch server. If you continue to have trouble, the agent can also switch to non-WebRTC connection in free-sitting screen.



2.17 Callback qualification pop-up [Update 10.72]

This feature requires the "Display callback qualification pop-up" option that should be install in the SALESFORCE connector configuration.

The feature allows the agent to qualify the callback presentation:

 Callback validation

Callback of :

 0630481372



Continue cycle

Call reason

PostCall Reason

Comment 1

Close

Next try

On the 27 / 06 / 2022 at 16 : 26

☐ Assign to me

Redo callback



– Continue Cycle:

- Callback will be rescheduled if the limit of try is not reached.
- If it is a Callback of a Campaign, the callback is reprogrammed to the current date + the delay indicated in "Time between the two attempts: No answer, Answering Machine" in campaign configuration.
- If it is a Unitary callback, the callback is reprogrammed to the current date + the delay indicated in "Time between the two attempts" in gate configuration associate to the Callback skill.

– Close:

- Callback will be NOT rescheduled and is marked as "done" in Odigo.
- If it is a Callback of a Campaign (from Odigo V5.4+)
 - a qualification motif can be indicated.
 - A comment can be added.

– Redo Callback:

- Call back will be always rescheduled.
- Callback will be presented at the date displayed even if the number of attempts has been reached.
- The Agent can also affect the next callback to me if he/she check the checkbox.

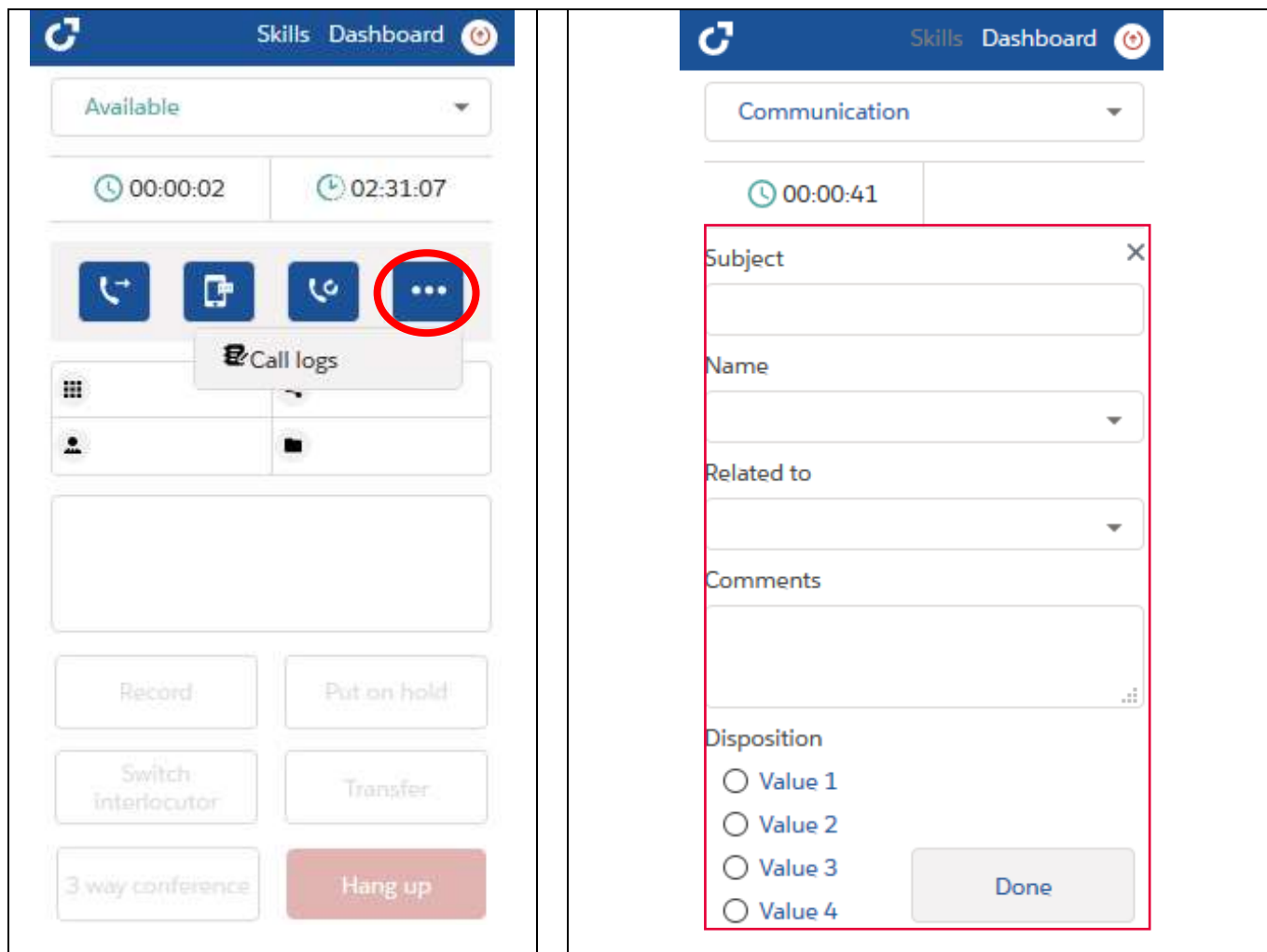
Remember: If the agent does not select any choice or close the windows, the call is marked as "Pending" in ODIGO and will be NOT rescheduled.

Important: You must have authorized pop-ups in your browser settings for the SALESFORCE site to display this window automatically.

2.18 Call Logs

This is a "Sales and Console Cloud" feature only that needs to be enabled by your administrator.

It allows the agent to start entering comments and the result of the call during the conversation and to store this data in the activity attached to a SALESFORCE object:



The image displays two side-by-side screenshots of the Salesforce Skills Dashboard interface.

Left Screenshot: The dashboard shows the status 'Available' with a dropdown arrow. Below it, a timer displays '00:00:02' and '02:31:07'. A row of icons includes a call icon, a document icon, a call icon, and a 'Call logs' icon (circled in red). Below these icons are buttons for 'Record', 'Put on hold', 'Switch interlocutor', 'Transfer', '3 way conference', and 'Hang up'.

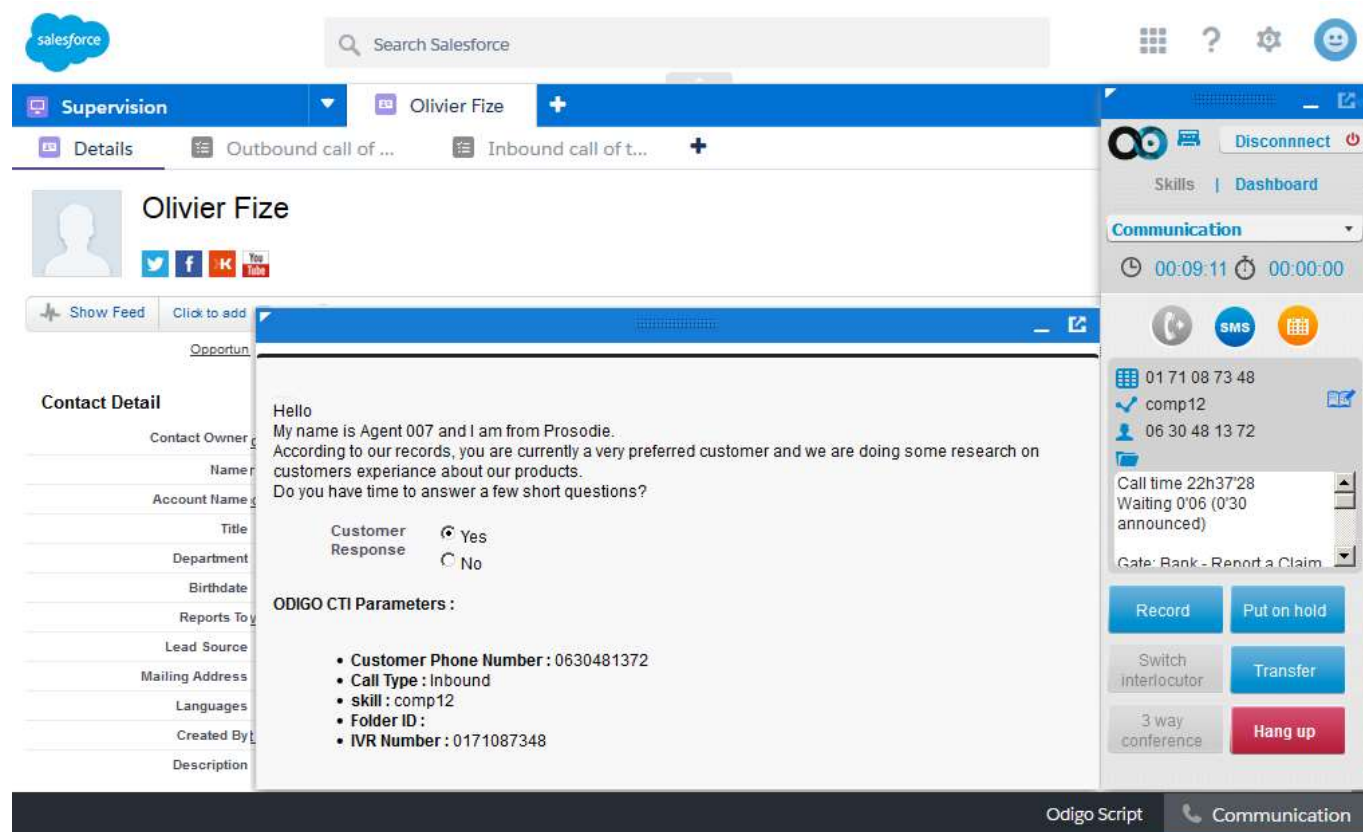
Right Screenshot: The dashboard shows the status 'Communication' with a dropdown arrow. Below it, a timer displays '00:00:41'. A form for creating a call log entry is shown, enclosed in a red border. The form includes fields for 'Subject', 'Name', 'Related to', and 'Comments'. Below these fields is a 'Disposition' section with four radio button options: 'Value 1', 'Value 2', 'Value 3', and 'Value 4'. A 'Done' button is located at the bottom right of the form.

Note:

- The "Name" and "Related to" drop-down lists are filled out as the agent browses contacts, accounts and opportunities. You can select the element to which you want to attach the activity.
- The call result values can be configured (see configuration).
- If you have not enabled automatic saving of the activity from the configuration, a "Save" button is displayed to allow the activity to be saved
- If you have enabled the "Automatic post-call break" and "Exit break when creating activity", the agent exits the break automatically when the activity is saved.

2.19 Call Script

This is a “Console Cloud” feature only that needs to be enabled by your administrator. An agent can read the script and perform different actions while he/she is in communication.

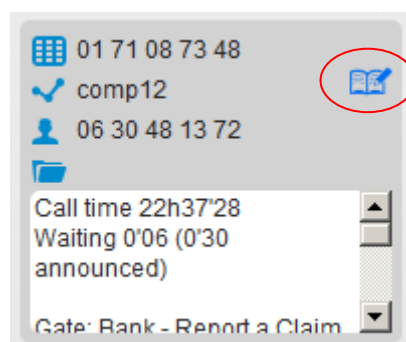


2.19.1 Automatic Mode

In automatic mode, call script will open automatically when communication starts.

2.19.2 Manual Mode

In manual mode, agent can open a call script by clicking on “call script” icon visible on CTI panel when communication is established.



Note: The result of the Sample Script delivered with CTI, is stored in the description of the post call activity at the end of the call.

2.20 Support and Version information

When a support request is made to the Odigo hotline, you may be asked for technical information from the "About window" accessible by clicking on the ODIGO logo in the connector.

 Skills Dashboard 

Available

00:00:00







Record

Put on hold

Switch interlocutor

Transfer

3 way conference

Hang up



Contact

+33 811 01 12 34

hotline-client@prosodie.com

Odigo configuration

<https://q-gateway-crm-in52.prosodie.com/gateway-crm>

<https://q-routing-in52.prosodie.com/in52>

ofize2

Odigo v10.3 - Copyright © 2019 Prosodie

2.21 Activities List

This feature shows the agent contact center's activities (according to the agent rights).

Action	Subject	Name	Related To	Due Date	Status	Priority	Assigned Alias	Last Modified Date/Time	Last Modified By
Inbound Call	Inbound call of the 2018/11/09 at 11:38	Jack		20/11/2018	Terminated	Normal	Office	20/11/2018 12:59	Office
Inbound Call	Inbound call of the 2018/11/09 at 11:37	Scott		20/11/2018	Terminated	Normal	Office	20/11/2018 12:58	Office
Inbound Call	Inbound call of the 2018/11/09 at 12:46	Scott		20/11/2018	Terminated	Normal	Office	20/11/2018 12:46	Office
Inbound Call	Inbound call of the 2018/11/09 at 12:42	Scott		20/11/2018	Terminated	Normal	Office	20/11/2018 12:43	Office
Inbound Call	Inbound call of the 2018/11/09 at 11:34	Scott		20/11/2018	Terminated	Normal	Office	20/11/2018 11:37	Office
Inbound Call	Inbound call of the 2018/11/09 at 11:38	Scott		20/11/2018	Terminated	Normal	Office	20/11/2018 11:33	Office
Inbound Call	Inbound call of the 2018/11/09 at 11:39	Scott		20/11/2018	Terminated	Normal	Office	20/11/2018 11:39	Office
Outbound Call	Outbound call of the 2018/11/09 at 10:39	Scott		20/11/2018	Terminated	Normal	Office	20/11/2018 10:39	Office
Support Request	Support request du 2018/11/07 à 15:37	Cal		27/11/2018	Terminated	Normal	Office	27/11/2018 15:07	Office
Support Request	Support request du 2018/11/07 à 12:31	Cal		27/11/2018	Terminated	Normal	Office	27/11/2018 12:02	Office

Communication

Notice:

- This tab must be added by the admin or the agent himself, by clicking on (+) menu button.
- Activities can be sorted by date (ascending or descending)
- Agent can personalize his view (All activities / My activities) and colon displayed.
- Always verify that the filter of all activities view is well configured.

Activities Edit View

Save | Save As | Delete | Cancel

Step 1. Enter View Name

View Name:

Unique Name:

Created By: Odigo Psa 20/09/2018 12:38 Modified By: Odigo Psa 20/11/2018 13:00

Step 2. Specify Filter Criteria

Filter By Owner:

☒ All Activities

☐ My Activities

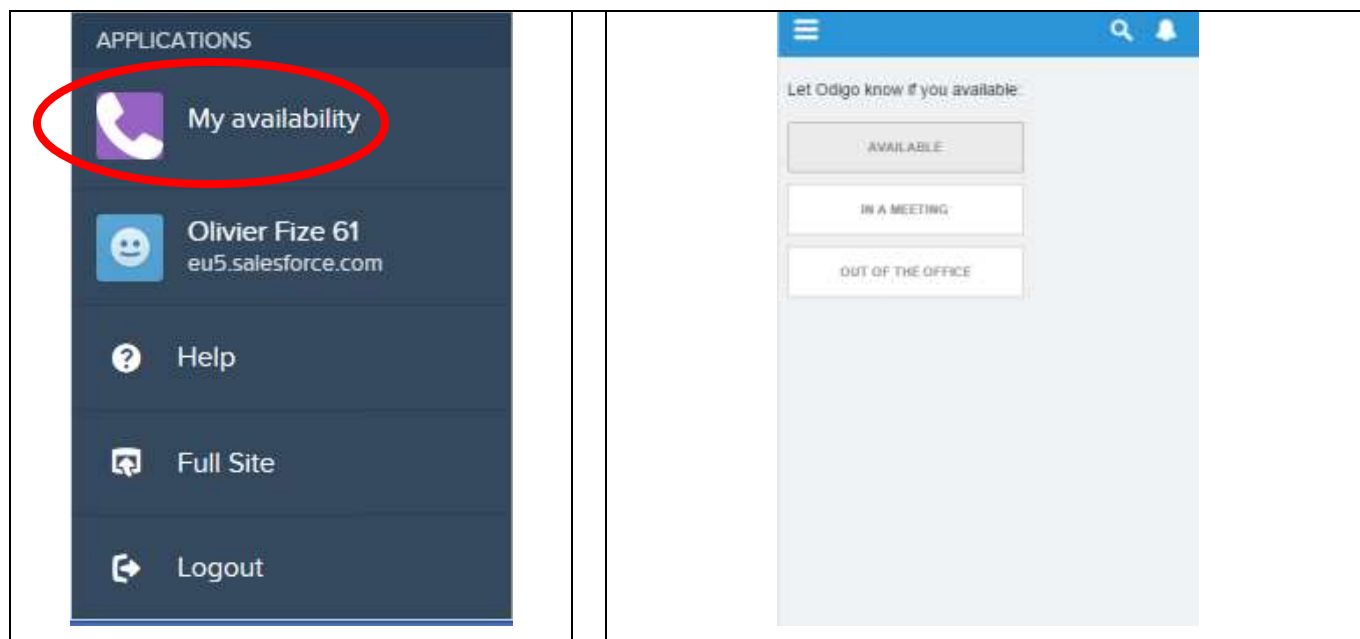
☐ My delegated activities

☐ My team's activities

2.22 Agent in mobility on SALESFORCE1

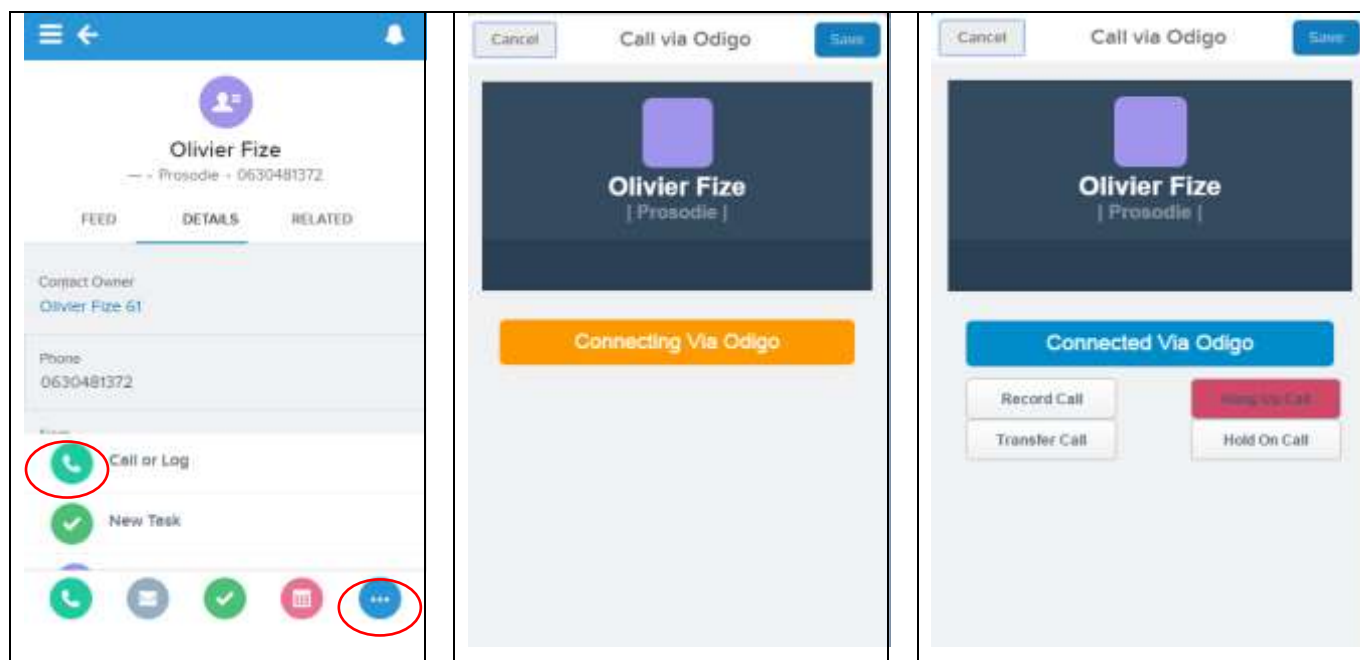
Authorized agent to do ODIGO calls with the SALESFORCE 1 Application

To receive *Incoming Call*, the agent must declare his availability in « My availability » Menu.



Note: Odigo connect Agent with the phone set in Odigo Profile only (Free seating is not possible)

To do outbound call for calling a contact, select « Call via ODIGO » action on a contact file.



During the conversation, agent can hold/retrieve, transfer, record and hang up call.

At the end of a conversation a task is automatically create.

Cancel

Edit Task

Save

TASK INFORMATION

Assigned To*

Olivier Fize 51

X

Status*

Completed

▼

Subject*

Outbound call of the 2015/03/25 at 10:50

Name

Olivier Fize

X

Due Date

25/03/2015

📅

Related To

-Select-

🔍

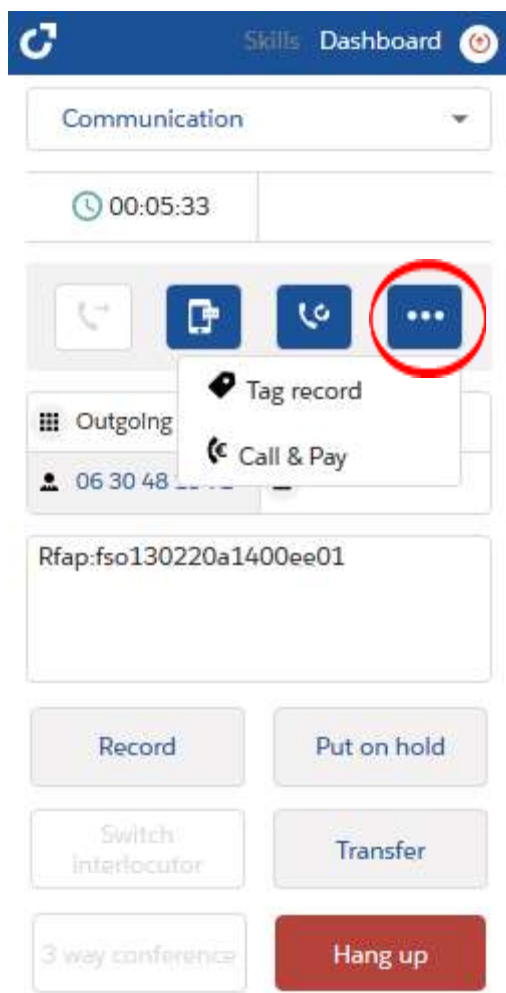
Remarks:

- If the agent is disconnected at the start of call, agent is automatically connected to ODIGO to do the call (No need to go to "My Availability" menu)

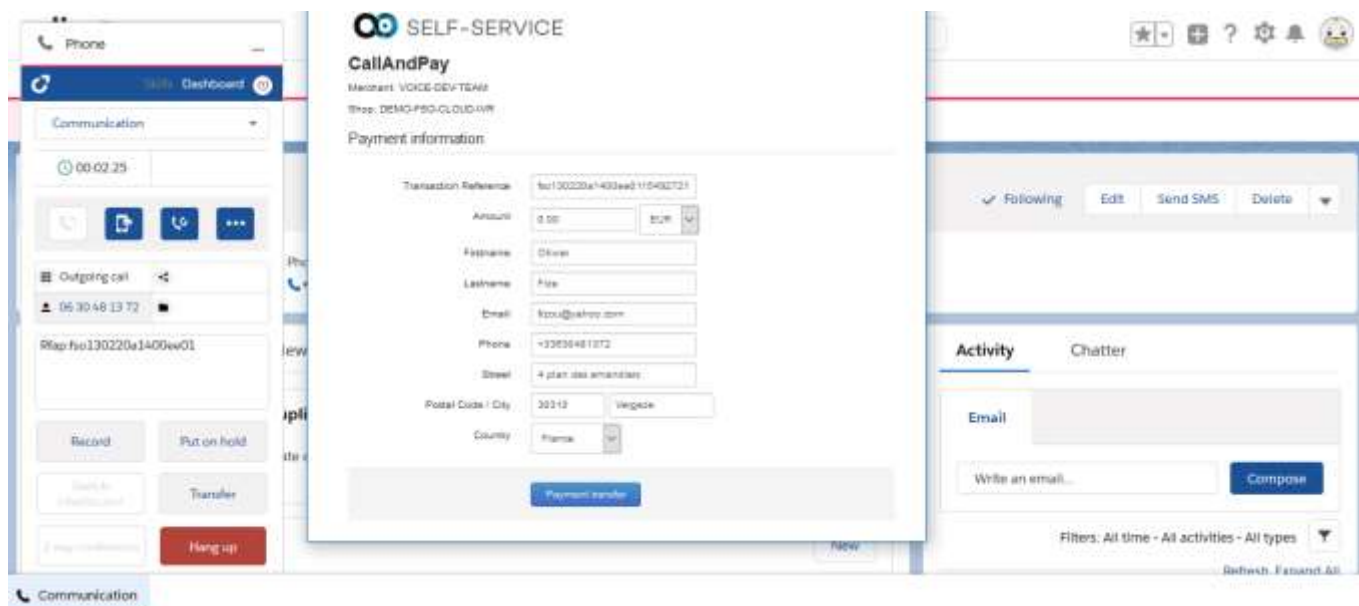
2.23 Call&Pay [Update 7.1]

Call&Pay feature allow your customer to pay directly via IVR service. This process is PCIDSS certified. While agent is in communication, he can use the Call&Pay link to launch the payment process.

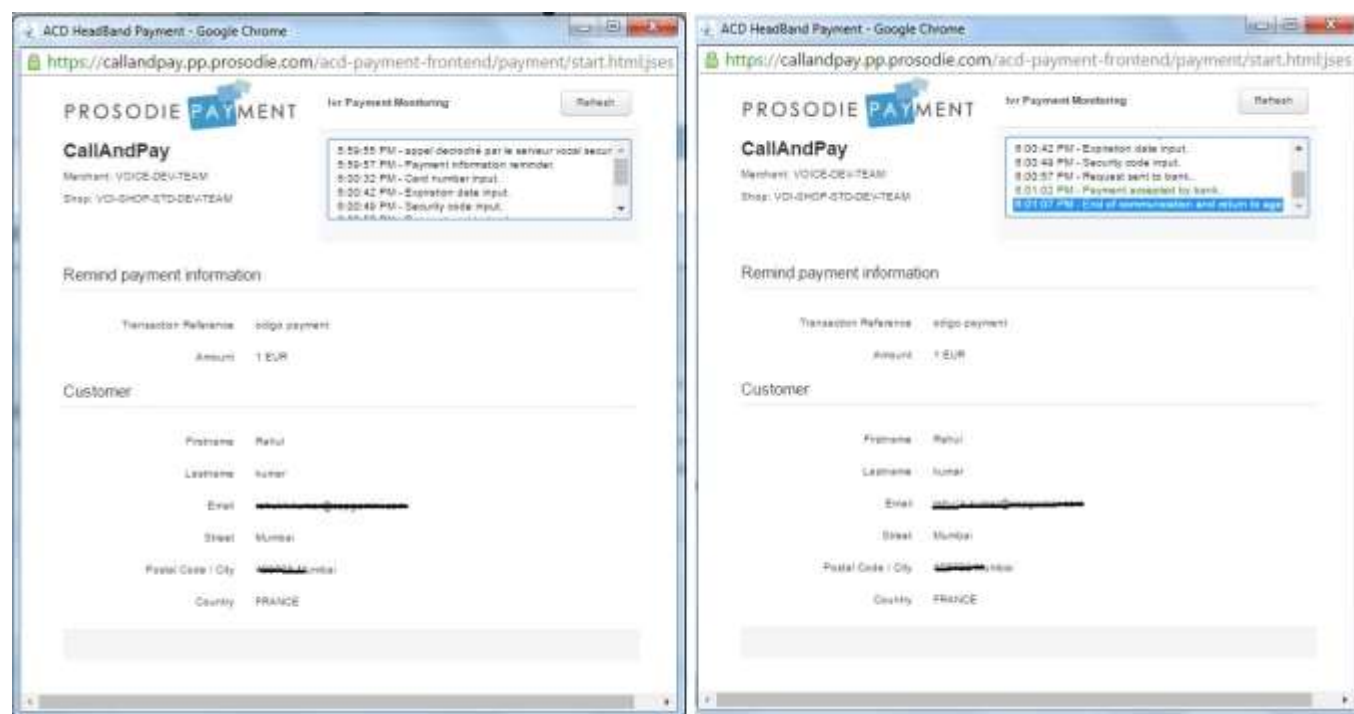
Step 1: Click on Call & Pay link under 4th Button menu while on communication.



Step 2: On click a popup will open (Allow popup in browser if asked). Agent will have payment page as mentioned below where they need to fill required detail of customer and later click on payment transfer (If you are on contact page or opportunity Field are fill automatically)



Step 3: The customer is transferred to Payment IVR. The agent can monitor the customer steps on IVR (Card entered, Date entered and the result of payment). The customer is re-put in relation with agent at the end of transaction (paid or refused).



Note:

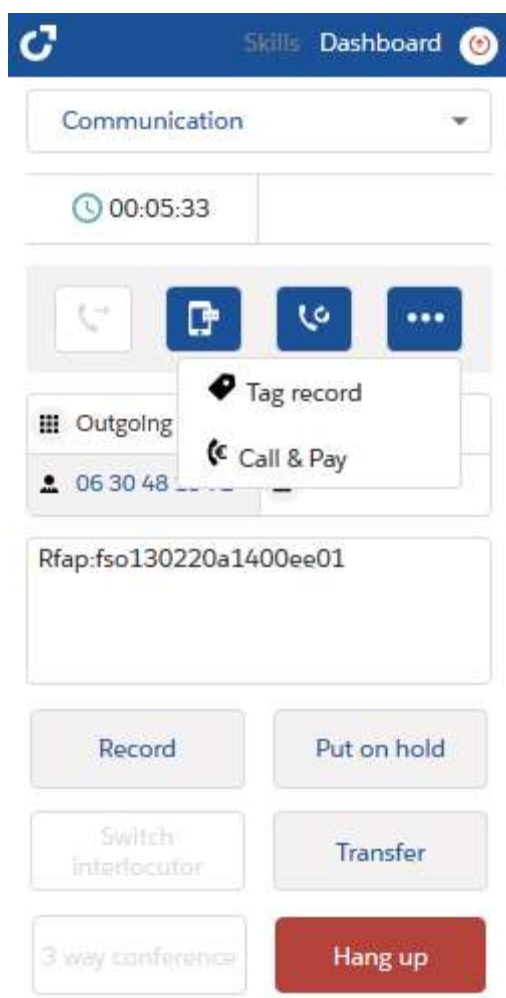
A Call & Pay activity, with payment result, is created and linked to contact or Opportunity showed on Hang Up.

2.24 Tag a record [New 6.5]

The tag record feature allows an agent to put a timestamp on the current conversation while this conversation is recorded. Prerequisite: having an OdigoRecord (>4.2) instance

Later on, the supervisor, while consulting the record inside OdigoRecord, will be able to directly go to the timestamp, skipping the rest of the conversation.

On Agent Side: Click on Tag record link under 4th Button menu while on communication (record running). This will mark a "tag" on voice record.



On Supervisor side: go to Odigo Record to consult the recording. The tag time is presented in record information and a button permits to directly go to the timestamp, skipping the rest of the conversation.

ECOUTE DU MESSAGE

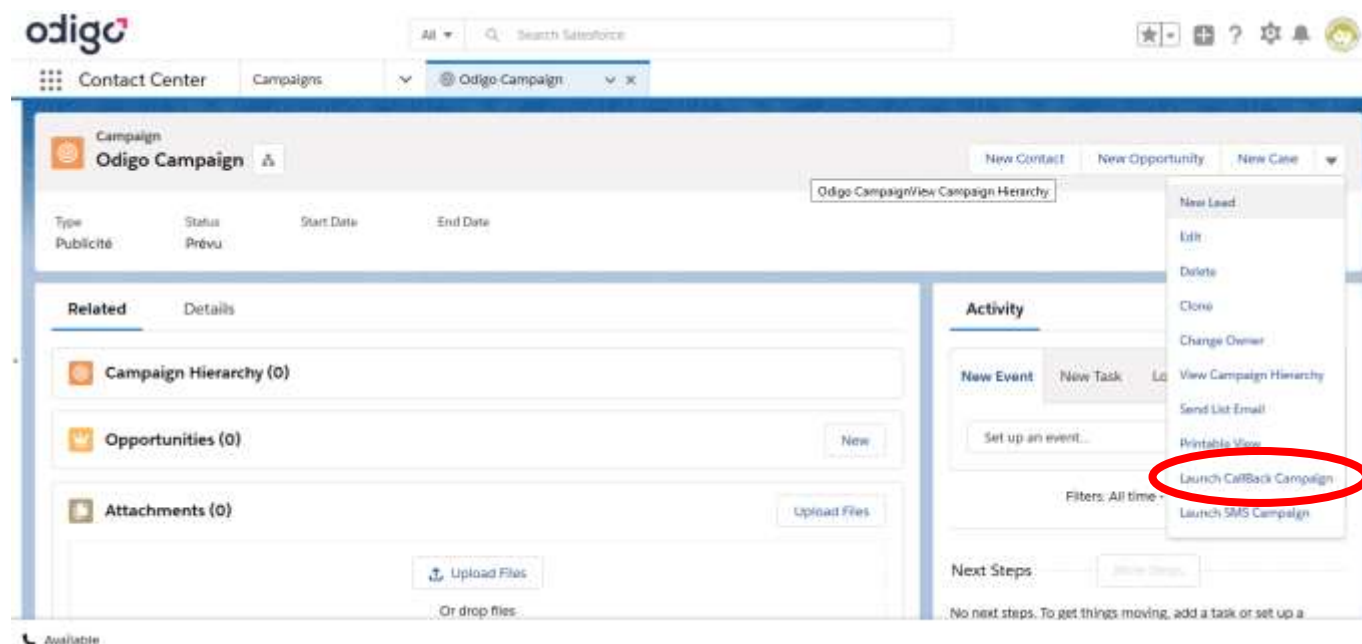


DURÉE

MESSAGE	
Référence	077a55TB9o0981
Réf. SVI	570779d6Bill9o0003d50201
Date Enr.	08/04/2016 11:31:01
N° service	0143752000
N° appelant	0143467500
Durée	01'45"
Type	
Statut	
Archivage	Archiver
MOTS CLÉS	
Mot_cle_1	accueil_com
TAG_HEURE	00:00:27

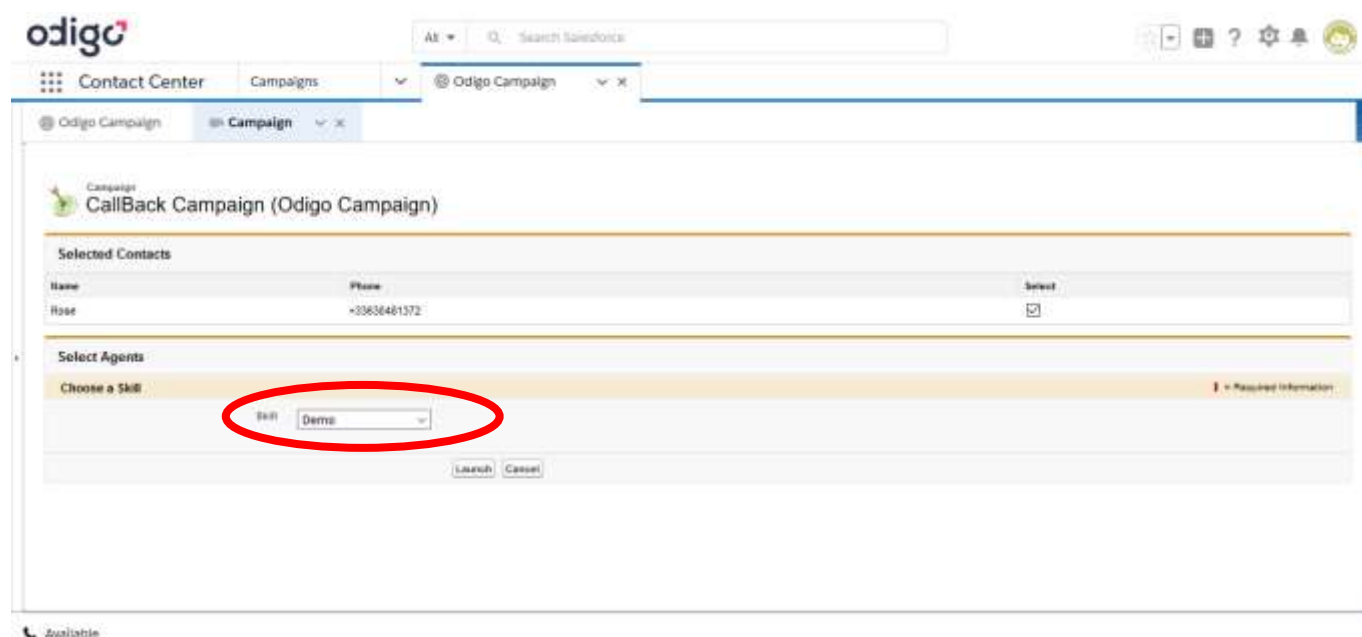
2.25 Callback Campaign [update 10.49]

Go to Salesforce campaign module, you can use the “Launch Callback Campaign” button to launch an Odigo callback campaign.



Note: this button needs to be activated in the campaign’s page layout

2.25.1 Launch Callback Campaign with Odigo 3.6-5.3 [update 10.49]



When launching the campaign, a resume of the campaign’s contacts to call is displayed and a skill list.

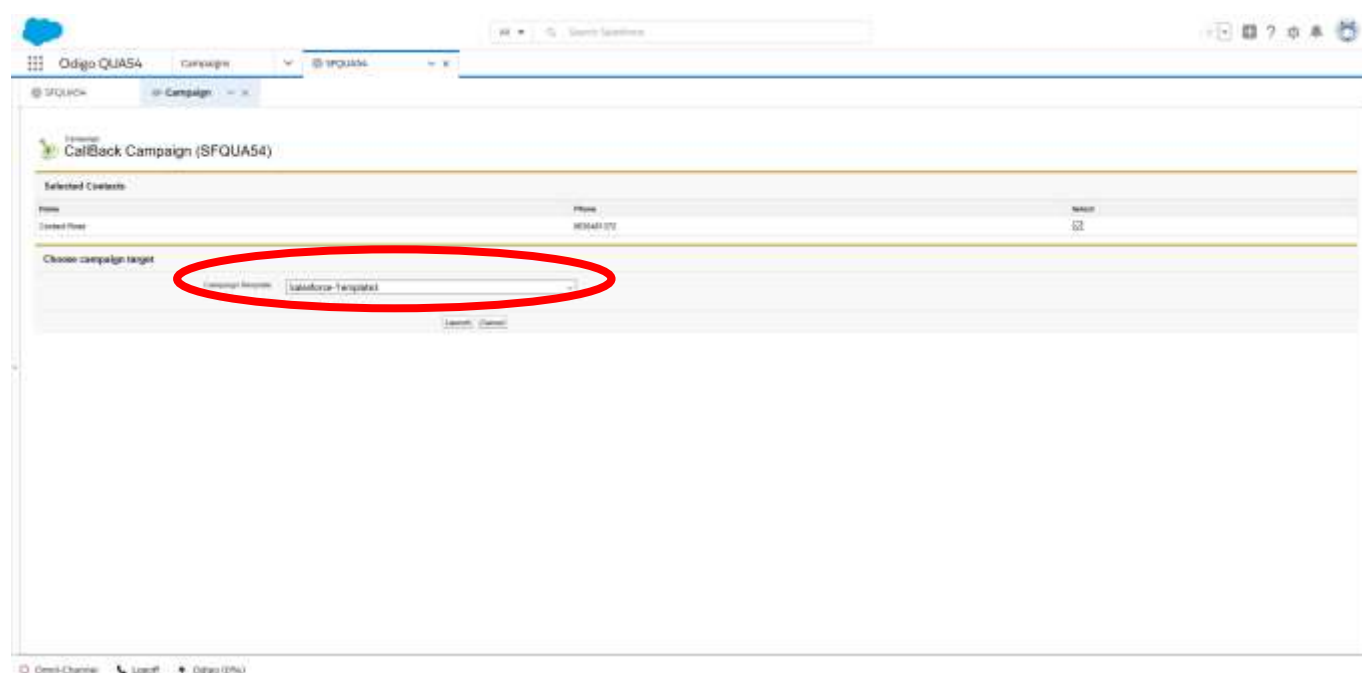
The list of skills proposed is the supervised skills list declared in Odigo (So the Salesforce user which launch campaign must be associated with an Odigo agent AND supervisor profile!)

Once done, click on the “Launch” button to automatically create and launch the callback campaign in Odigo.

Note:

- The new campaign will be created with its SF name (completed with timestamp to be unique), the start/end date of SF campaign and will contains every selected contact of the page.
- Odigo will distribute the calls to every agent connected on the chosen skill.
- The information transmit from Salesforce to Odigo campaign Module are:
 - Name of Salesforce campaign + Time Stamp (For unicity)
 - The phone of Salesforce Contact or Lead.
- Import is limited to 2000 members.

2.25.2 Launch Callback Campaign with Odigo 5.4+ [update 10.49]



When launching the campaign, a resume of the campaign’s contacts to call is displayed and an existing Odigo campaign template List

The list of campaign templates proposed are the active and closed campaigns already existing in Odigo and corresponding to the rights of the user declared in Odigo.

The ODIGO user associate to Salesforce user must be agent AND supervisor profile, Read right access on one or several campaign groups and write right access (To Load Campaign)



Once done, click on the "Launch" button to automatically create and launch the callback campaign in Odigo.

Note:

- The new campaign will be created with its SF name (completed with timestamp to be unique), the start/end date of SF campaign and will contains every selected contact of the page.
- Odigo will distribute calls with the programming policy to all agents which are declared in template campaign.

Important: if the campaign has been just activated, the agents must totally logoff from Odigo CTI and then reconnect. They will see in free-seating windows the name of the new campaign and can select it to get corresponding calls to do.

- The information transmit from Salesforce to Odigo campaign Module are:
 - Name of Salesforce campaign + Time Stamp (For unicity)
 - Start Date and end date of Salesforce Campaign (The start date is automatically adjusted to the current date if the Salesforce start date is < to the current date or not exist.
 - The phone (in this order Mobile, Phone, home, other, assistant), first Name, last name, Postal code, country of Salesforce Contact or Lead.
- Import is limited to 2000 members.

2.25.3 Free-seating for campaign at connection [Update 10.31]

This feature requires the agent to be authorized to change their skills or campaign in ODIGO.

- In Odigo 5.3 and < : Odigo will distribute calls to all agents which the selected skill.
- In Odigo 5.4 and > : Odigo will distribute calls to all agents which are selected campaign.



Skills Dashboard



Available

00:00:00











Record

Put on hold

Switch interlocutor

Transfer

3 way conference

Hang up



Connection informations

Phone Type

Telephone

Fill in your phone number

0411320246

Select a model

Default Configuration

SKILLS

CAMPAIGN

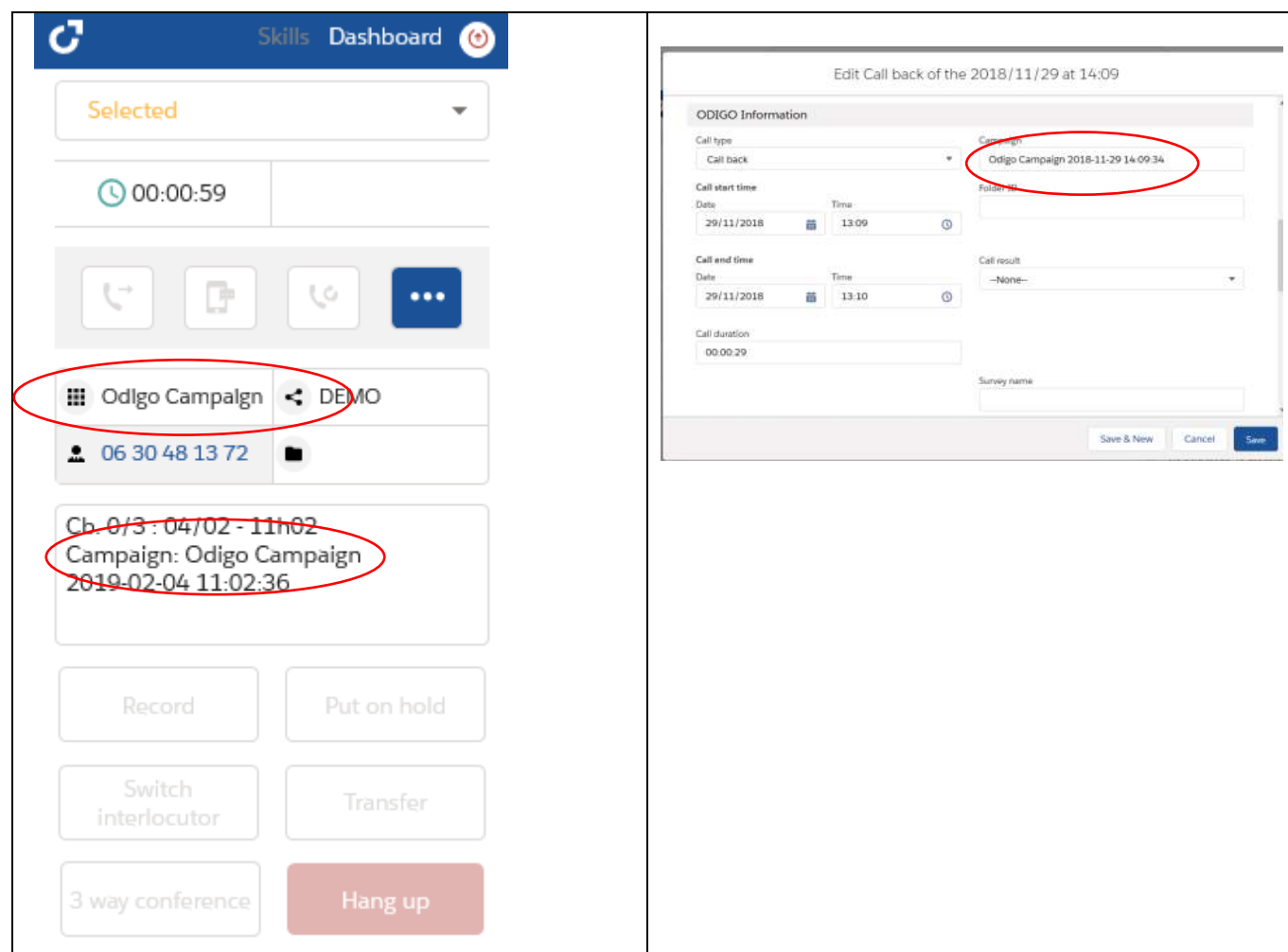


CAMPAIGN LIST	ACTIVATED
AA_Salesforce-Template	☐
test 2020-06-08 16:58:...	☐
test 2020-06-08 17:03:...	☐
test 2020-06-09 09:28:...	☐

Validate

2.25.4 Receiving a Callback Campaign call

The campaign name is displayed on CTI when callback arrives and is automatically stored in post-call activity.

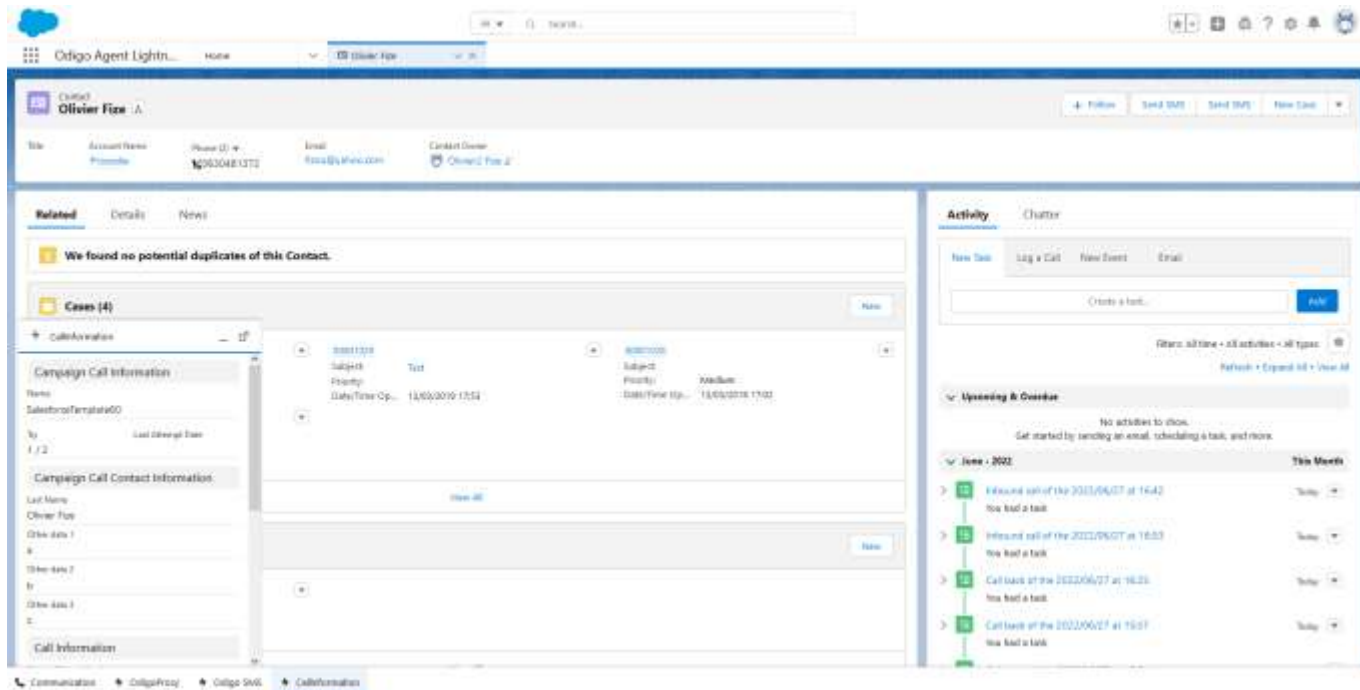


The image displays two screenshots from a CTI interface. The left screenshot shows a call card with the following details: 'Selected' status, a timer at 00:00:59, and a call card showing 'Odigo Campaign' and 'DEMO' circled in red. Below this, the call details 'Cb: 0/3 : 04/02 - 11h02' and 'Campaign: Odigo Campaign 2019-02-04 11:02:36' are also circled in red. The right screenshot shows the 'Edit Call back of the 2018/11/29 at 14:09' form. The 'Campaign' field is circled in red and contains the text 'Odigo Campaign 2018-11-29 14:09:34'.

Optionally it can be linked by your administrator to the campaign object by a trigger.

2.25.5 Display Campaign Contact Information [New 10.72]

A Widget can be added on Salesforce utility bar to display current campaign call information:



The information displayed are:

- Campaign Call Information: Name, Try, ...
- Contact Called Information injected on Odigo: Standard and Custom Fields
- Call information

⚡ CallInformation

-
↗

Campaign Call Information

Name

SalesforceTemplate60

Try
1 / 2

Last Attempt Date

Campaign Call Contact Information

Last Name

Olivier Fize

Other data 1

a

Other data 2

b

Other data 3

c

Call Information

⚡ CallInformation

-
↗

Call Information

Service Phone Number

-

Customer Phone Number

0630481372

Skill

Cpg_211_2147483436

Folder

Id

awe0u63shgmuqfk21ufi92rlk0gb201

Call Details

Line 1

Cb. 0/2 : 27/06 - 15h57

Line 4

Campaign: SalesforceTemplate60

Note :

- On a Campaign call, the widget is automatically open
- On non-campaign call, widget contains only call information.



2.26 Omni-Channel [Update 11.0]

2.26.1 Omni-Channel External Routing [Update 10.96]

Odigo can route Salesforce digital interaction and found an agent for it with the right skill and capacity. This feature is only available in lightning mode with the following channels:

- Case (mail, Social Network) and Chat with Odigo V5.2+
- Lead with Odigo V5.3+
- Custom Object / Messaging (Digital engagement) with Odigo V5.7+

Digital interactions are prioritized by their priority first and then by their ageing:

- the priority of an interaction is incremented by a transfer with the Odigo Transfer button or by a disturbance
- the ageing of an interaction is calculated when the interaction is routed. It is equal to the difference between the datetime of routing and the datetime of creation. If this difference is lower than 60 sec, the ageing of the interaction is set to 0. Indeed, the ageing is useful only for cases of reopened or reassigned interactions.

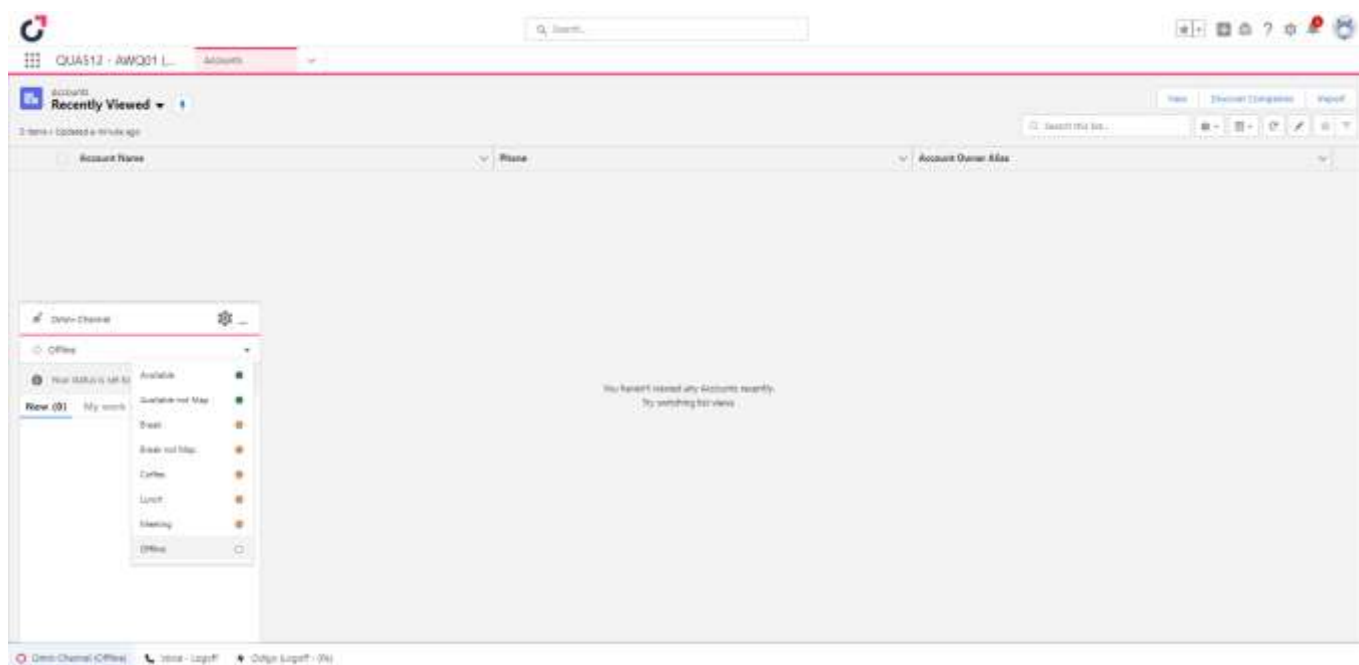
2.26.1.1 Agent side [Update 10.94]

Agent can pilot his/her presence on eligible Digital channels and Voice channel in SALESFORCE and receive the right interaction according the Odigo Media blending rules.

Note: Be careful to never open the Salesforce Interface on several Computer/Browser/Tabs. Salesforce has its own Console Interface with internal tabs to work on several context at same time.

2.26.1.1.1 Manage Presence [Update 10.96]

The Agent use Salesforce Omni Channel utility bar to manage its presence and select an Online or Break Status.



The agent sees his Salesforce status in Omnichannel, his Voice status in the Voice component and his Odigo Global Status* in the title of Odigo Component.

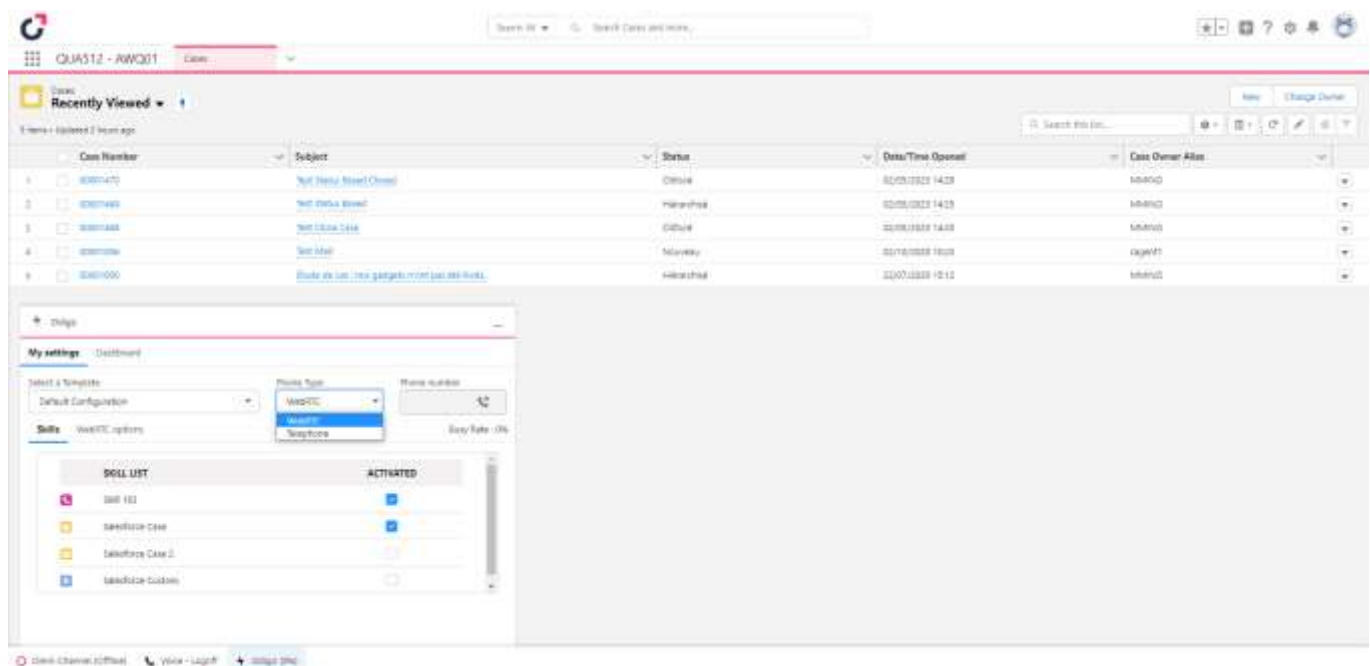
*The labels of the Odigo Global Status are defined in the "General Parameters", "Status" menu of Odigo Admin.

With digital interactions, when the agent changes his status for "Offline":

- In Tab based mode, all interactions are closed (Salesforce behavior) even if the tabs are not closed. Also, a toaster with the links of impacted interactions is displayed to inform the agent that all his interactions were automatically closed.
- In Status based mode, a toaster with the links of impacted interactions is displayed to inform the agent to manually close his interactions to be actually disconnected.

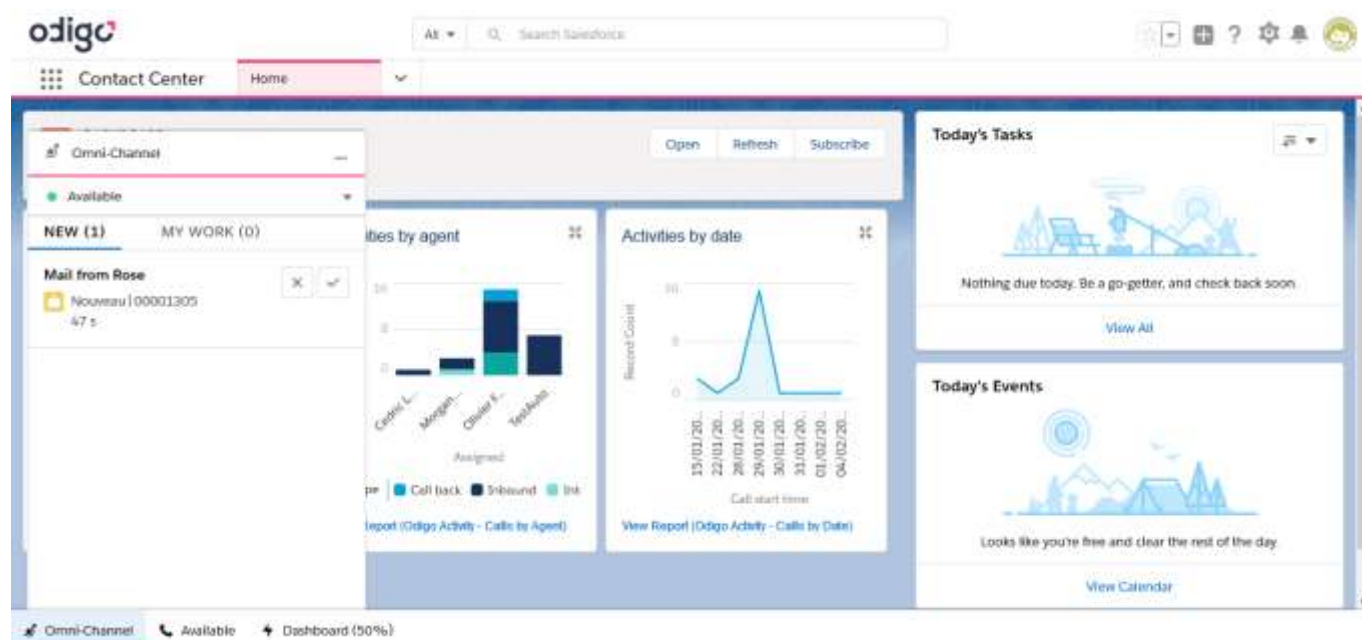
2.26.1.1.2 Manage Agent Settings [Update 10.88]

According to his rights set by supervisor, the Agent can use Odigo Component in utility bar to change his phone type, phone number, skills, campaigns and WebRTC sound options.



2.26.1.1.3 Digital Interaction [update 11.0]

The Agent can accept (or optionally refuse) an interaction presented to him/her in Salesforce Omni Channel utility bar:



Until the 10.96 package, the “selection” and “handled” metrics are incremented when an interaction is presented to the agent, no matter if he accepts or refuses the interaction. Also, there isn’t any distinction between a refused or dissuaded interaction, the “in fault” metrics are incremented in both situations.

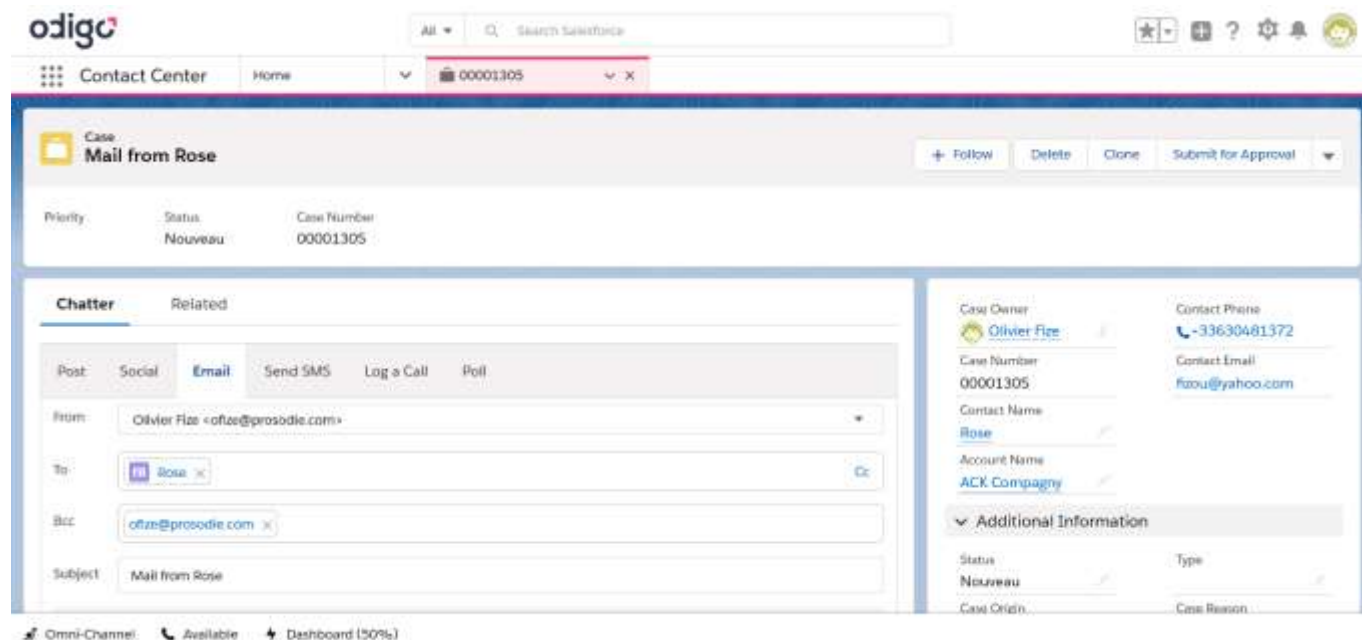
From the 11.0 package, when the “Selection state on digital interaction” is enabled (see the Admin documentation to know more about the configuration of this feature), the metrics better reflect the agent’s actions on the digital interactions:

- when an interaction is assigned to an agent, the agent is in “selected” state on the Odigo channel and the “selection” metrics are incremented
- when an interaction is accepted, the agent is in “processing” state on the Odigo channel and the “handled” metrics are incremented
- when an interaction is refused, the agent is in “available” state on the Odigo channel and the “refused” metrics are incremented
- when an interaction reaches the timeout, the agent is in “disturbance” state on the Odigo channel and the “in fault” metrics are incremented

Here a table of the supervision and statistics metrics impacted by this feature:

Type of metrics	Supervision metrics	Statistics metrics
Selection	Number of interactions presented (44)	Number of agent selections (10200)
Handled	Number of inbound interactions handled (6)	Number of interactions handled (10113)
Refused	Number of refused interactions (220)	Calls in Fault or Refused by Agent (10144) + Number of interactions refused by agent (10096)
In Fault	Interactions in faults (46)	Calls in Fault or Refused by Agent (10144) + Calls in Fault (10059)

The Interaction is displayed as a tab in Salesforce:



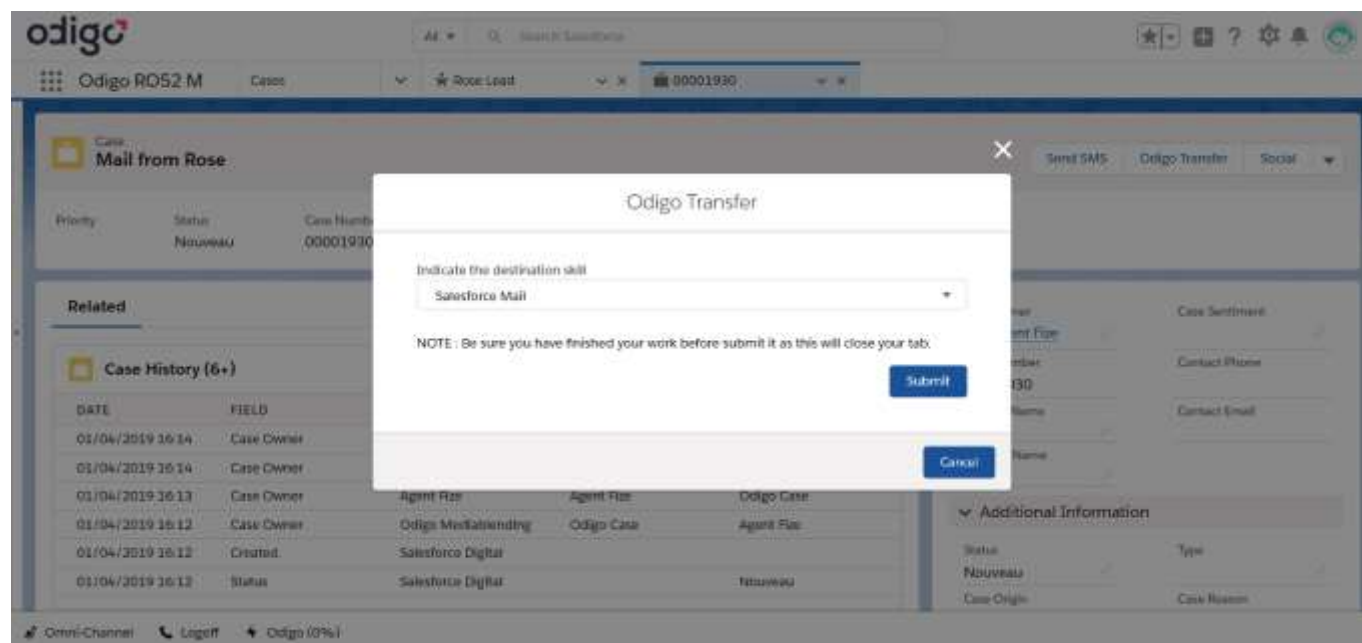
The agent is considered occupied by this interaction until he/she closes the tab. An indication of Agent Busy Rate is always indicated on Dashboard Utility Bar (Dashboard x%)

Note on specific behavior: During his work on a task, if an agent puts him "Offline" or closes his browser during more than ~5 minutes (Salesforce Omnichannel Timeout) :

- In tab-based mode : Salesforce and Odigo Busy rate pass to 0%
- In status-based mode : Salesforce task stays affected to agent on SF Omnichannel and Odigo Busy rate stays coherent with that (>0%)

2.26.1.1.4 Transfer Digital Interaction on skill via Odigo Transfer Button [update 10.75]

According to its rights, the agent can also transfer Digital interaction to another Odigo skill, by clicking on the 'Odigo Transfer' action button:



The Digital interaction will be automatically close on agent desktop and re-present to another agent with the right skill.

Note:

- The position of the transfer action button on screen depends of the routing object (case, lead, custom object or chat) and if you have Chatter enabled or not in Salesforce.
- To transfer a chat, use the standard "transfer to Chat button" Salesforce action to transfer it (Odigo mapping will to the rest...)
- Transfer a messaging interaction (Digital Engagement) is not possible.

2.26.1.1.5 Transfer Digital Interaction via « Change Owner » button on tab-based mode [New 10.83.1]

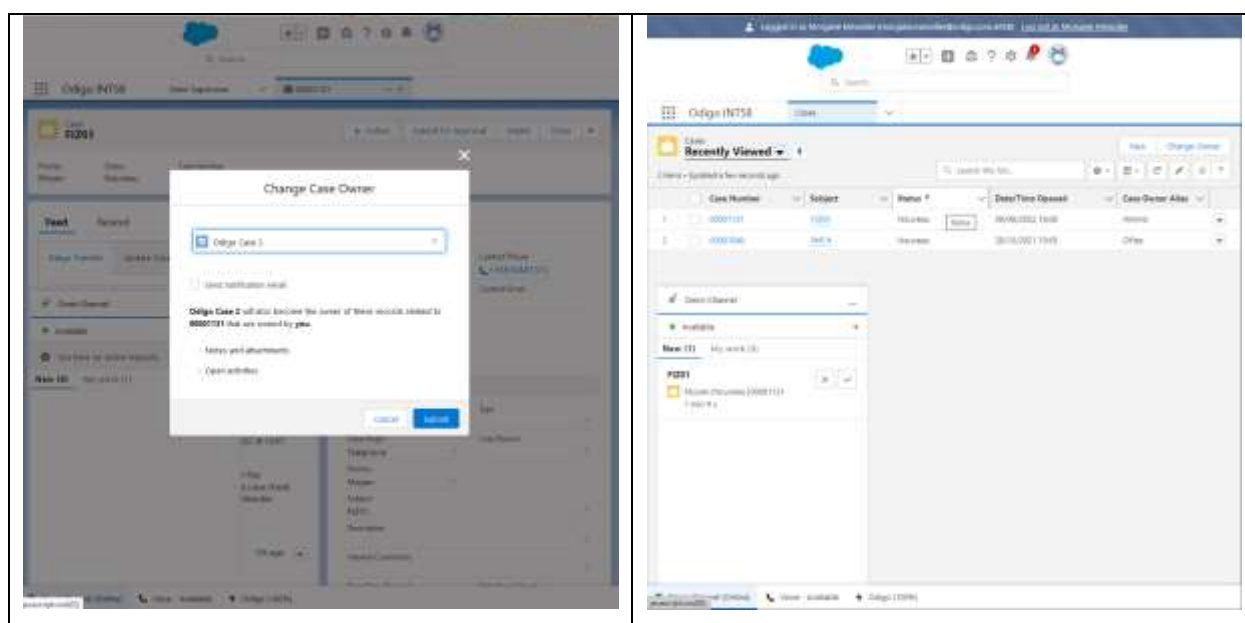
We recommend using the Odigo Transfer button in External Routing mode, however, you can also use the Salesforce "Change Owner" button while processing a digital interaction presented by Odigo.

Important:

- The Salesforce action "Change of owner" is not subject to the transfer rights declared in Odigo.
- The Salesforce administrator must have implemented the trigger provided in the administration manual

The behavior will then be as follows:

- 1) "Change owner" action on an Omni Channel hold file managed by Odigo:



The interaction is indeed assigned to the Salesforce managed queue by Odigo and presented by Odigo to a destination agent if available.

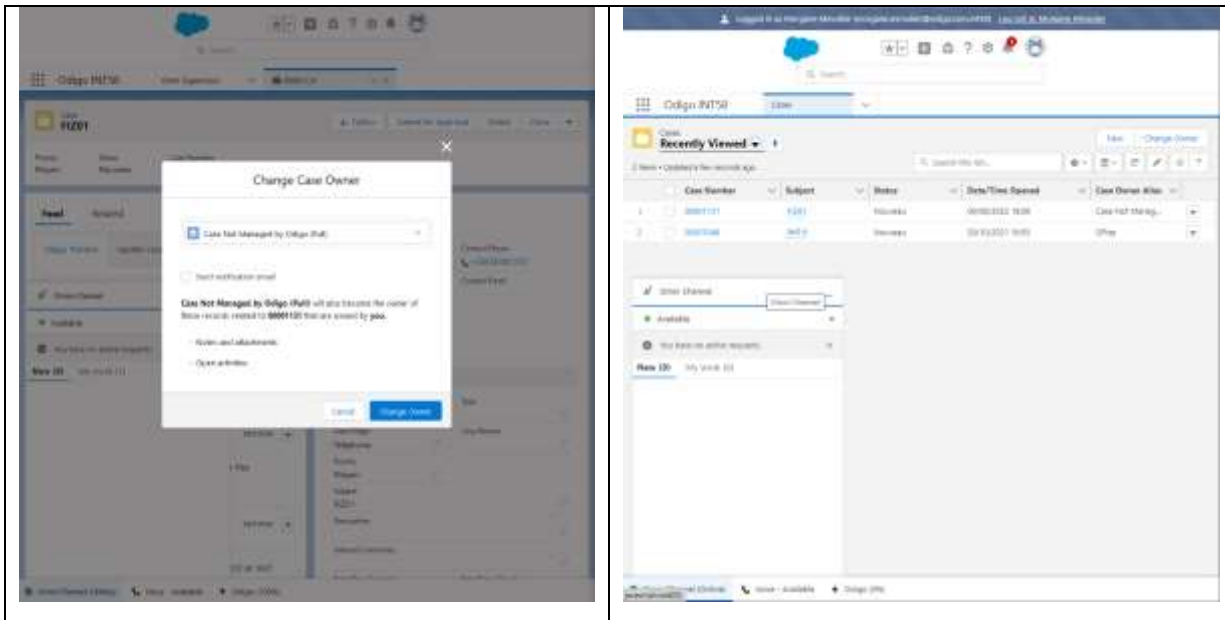
The Odigo occupancy rate of the sender of the transfer is IMMEDIATELY reduced by the weight of the interaction WITHOUT waiting for the interaction tab to be closed.

The Salesforce occupancy rate of the sender of the transfer is reduced by the weight of the interaction only when the interaction tab is closed by the agent *.

On Odigo Supervision side, "Change Owner" on Odigo managed queue is seen as a task reinsertion on a queue not as a task transfer on queue : Gate Metric 90 instead 86 incremented.

Consider the use of Odigo Transfer button if you need this data.

2) "Change owner" action on an Omni Channel queue not managed by Odigo:

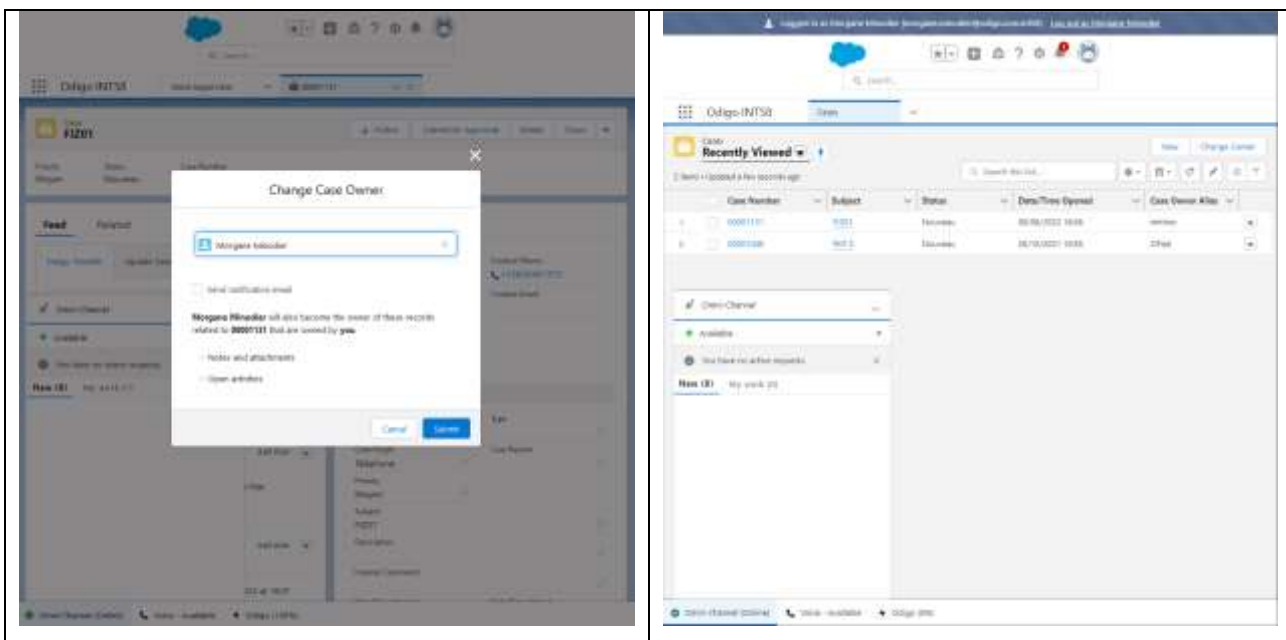


The interaction is assigned to the unmanaged queue. Its processing can then be manual or automated by a Salesforce mechanism (excluding Odigo).

The Odigo occupancy rate of the sender of the transfer is IMMEDIATELY reduced by the weight of the interaction WITHOUT waiting for the interaction tab to be closed.

The Salesforce occupancy rate of the sender of the transfer is reduced by the weight of the interaction only when the interaction tab is closed by the agent *.

3) "Change owner" action on another Salesforce user:



The interaction is assigned to the Destination Agent in Salesforce BUT is not automatically presented in the Omni Channel to the Destination Agent by Salesforce (Salesforce Standard Behavior*)

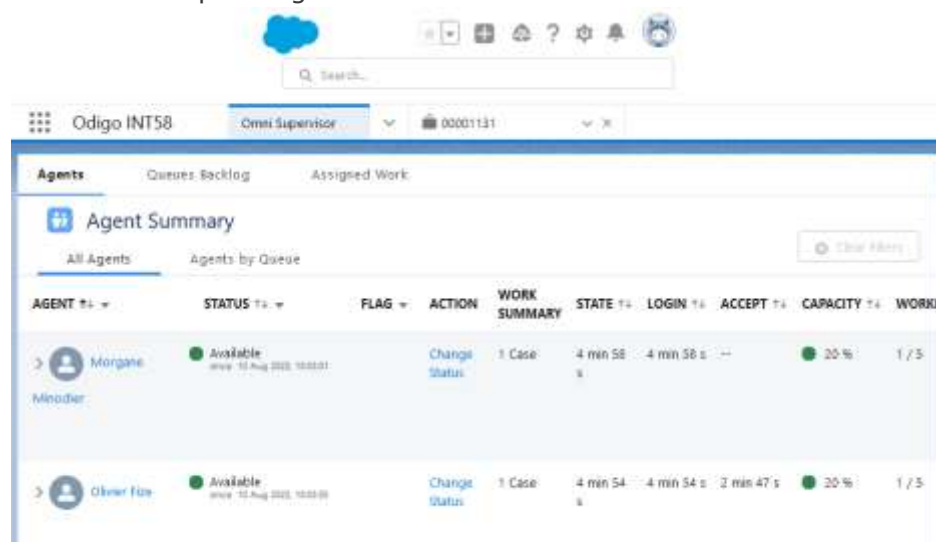
The Odigo occupancy rate of the sender of the transfer is IMMEDIATELY reduced by the weight of the interaction WITHOUT waiting for the interaction tab to be closed.

The Salesforce occupancy rate of the sender of the transfer is reduced by the weight of the interaction only when the interaction tab is closed by the agent *.

The transfer recipient's Odigo occupancy rate is not increased by the weight of the interaction (The routing is done internally by Salesforce, not by Odigo!).

*: This is standard Salesforce behavior in Tab mode with or without External routing

This is not a problem for the operation of Odigo external routing but the interaction is still referenced as open in Salesforce supervision on the sender of the transfer as long as this agent does not close the interaction tab. It can therefore appear affected several times in Salesforce Supervision if it reaches a recipient agent before the sender has closed his tab...



As a reminder, the Odigo transfer button on skill addresses this point by automatically closing the sender's tab which the salesforce change owner button cannot do.

2.26.1.1.6 Transfer Digital Interaction via « Change Owner » button on Status-based Mode [New 10.75]

If you enable Omni-Channel status-based mode *, task closure will occur on interaction status change instead of tab closure.

The behavior described in the previous chapter is then changed as follows:

- 1) "Change owner" action on an Omni Channel queue managed by Odigo:



The Odigo and Salesforce occupancy rate of the sender of the transfer is IMMEDIATELY reduced by the weight of the interaction WITHOUT waiting for the interaction tab to be closed.

2) "Change owner" action on an Omni Channel queue not managed by Odigo:

The Odigo and Salesforce occupancy rate of the sender of the transfer is IMMEDIATELY reduced by the weight of the interaction WITHOUT waiting for the interaction tab to be closed.

3) "Change owner" action on another Salesforce user*:

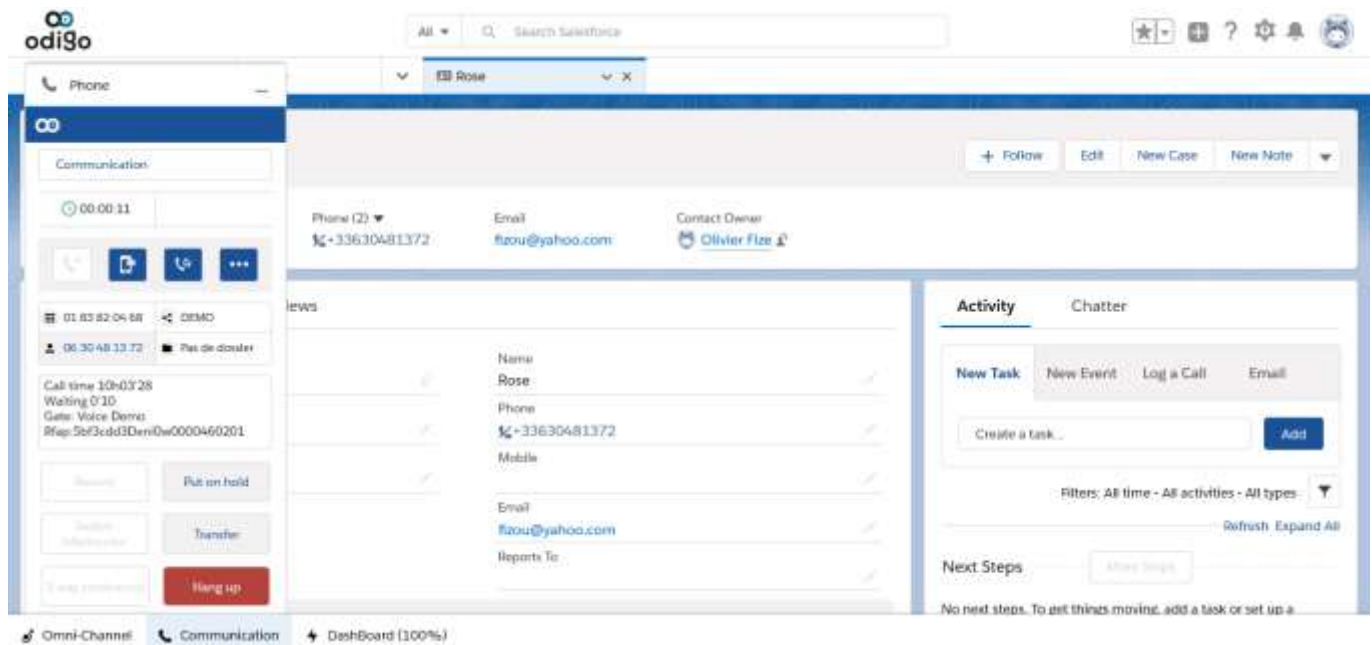
The Odigo and Salesforce occupancy rate of the sender of the transfer is IMMEDIATELY reduced by the weight of the interaction WITHOUT waiting for the interaction tab to be closed.

The interaction is assigned to the destination agent in Salesforce and is automatically presented in the Omni Channel to the destination agent by Salesforce (Not by Odigo) if it is available or on its next connection if it is not (Salesforce standard behavior)

Important: As indicated in the administration manual, the 2 check boxes "Check agent capacity on reopened work items and Check agent capacity on reassigned work items" must be stayed unchecked in the Service Channel configuration in status-based mode. (If they are checked and the destination agent is not online at the time of the assignment, Salesforce puts the interaction back in the previous queue. This is not supported by Odigo)

2.26.1.1.7 Voice Interaction [10.94]

The voice interaction is presented to agent by the CTI and pop customer tab according to the phone number.



Once in communication, with the customer the CTI permits to agent to pilot communication (hold, transfer...) as indicated in the previous chapter of this documentation.

Note:

- The presence manager is no more on CTI but in Omni Channel windows (Global Presence on all channel).
- Access to skills and metrics is now hosted in Odigo Utility bar.
- If a maximum number of interruptions by the voice is set up on a digital channel, when the counter is reached, a toaster is displayed to inform the agent about his unavailability on Voice channel until he finishes the interactions that have reached his maximum number of interruptions. The toaster is displayed at the beginning of the call that has triggered the maximum number of interruptions, and the Voice channel changes to Unavailable at the end of the call (after the wrap-up if applicable). Another toaster is displayed when the concerned interactions are finished, and the Voice channel returns to Available.

Note: In 10.65+, The Odigo CTI Status indicate in Utility bar is prefix by "Voice -" to focus that the status display is the status of Voice channel Only.

2.26.1.1.8 Access to agent Metrics and Statistics [Update 10.18]

According his rights set by its supervisor and Odigo 5.4+, the Agent can consult his own metrics and statistics in Odigo Utility bar:



odigo

Search Agents and more...



Odigo RO52 M Account

Odigo

Skills Analytics **Statistics** Gates

Select a year: 2019

A month: June

A day a week

Week: 22

22 23 24 25 26 27 28 29 30 31

23 24 25 26 27 28 29 30 31

24 25 26 27 28 29 30 31

25 26 27 28 29 30 31

26 27 28 29 30 31

27 28 29 30 31

Options: Global Details

Include zero values

Validate

2019 JANU FEB MAR APRIL MAY JUNE TOTAL

Selection agent 34 48 1344 1425

Abandon client 30 48 1344 1425

Traffic 30 48 1344 1425

Selection agent 34 48 1344 1425

Dérangement/Refus 5 4 1315 1324

Dérangement 3 4 1315 1324

Refus 3 4 1315 1324

Occupation agent 3 4 1315 1324

Durée de dérangement 3 4 1315 1324

Déconnecté > 10sec 3 4 1315 1324

Déconnecté > 10sec 3 4 1315 1324

Durée totale déconnecté 00:00:10 00:00:03 00:00:03 00:00:16

Traffic 30 48 1344 1425

Durée totale com 02:59:17 05:12:45 00:29:32 10:11:25

Durée totale com 02:59:17 05:12:45 00:29:32 10:11:25

Traffic 30 48 1344 1425

Paramètres de trafic 16 11 6 66

New Import

Search: DFO 100

ACCOUNT OWNER ALIAS

DFO

DFO

DFO

Omni-Channel Available Odigo (10%)

Skills	Statistics	Metrics	Gates
00:00:48 AvailTim			
00:00:03 BreakTim			
Total			
Availability Duration			00:00:48
Break Duration			00:00:03
Handled Interaction			1
Number Of Break			1
Transfer Request			0

Omni-Channel Available Odigo (0%)

Odigo

Skills

Statistics

Metrics

Gates

	Int.Received	Int.Handled	Int.Waiting	Agd Logged	Agd Available	Agd In Break
Salesforce Case	0	0	0	1	1	0
Salesforce Chat	0	0	0	1	1	0
Voice Wides	0	0	0	1	1	0
Voice Demo	1	1	0	1	1	0
Voice Ski	0	0	0	2	2	0

Omni-Channel

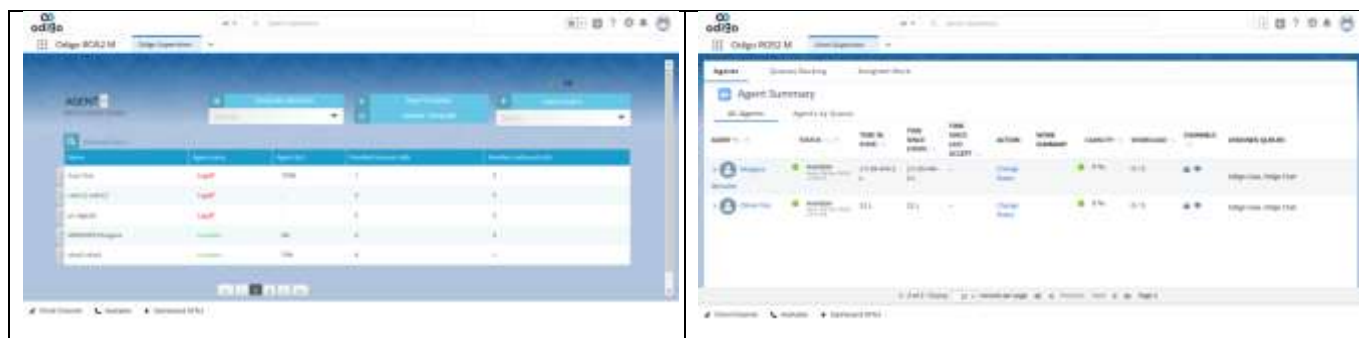
Availability

Odigo (0%)

Omni-Channel Available Odigo (0%)

2.26.1.2 Supervisor Side

Supervisor can use ODIGO Supervision or SALESFORCE Omni-Channel Supervision to modify the state of his agent to right channel:



Of course all Odigo supervisor tools, wallboard, etc... are also available in Odigo back office :

AGENTS

RESULTS 4

Page 1 of 1

02:55

Results per page

Agent	Status	QoS	APPELS							SORTANT	
		GoS	Nb_Sél	Nb_Abd	Nb_Org	Traités	TMC	Dr_Max_Coem	Nb_Srt	TMS	
 ofize2 ofize2 	 Processing	-	7	0	0	7	0:00:57	0:02:29	0	0:00:00	
	 Available	-	1	0	0	1	0:00:25	0:00:25	0	0:00:00	
	 Processing	-	6	0	3	6	0:01:05	0:02:29	-	-	
	 Available	-	0	0	0	0	0:00:00	-	-	-	

2.26.2 Presence Synchronization [New 5.0]

This feature is only available in console and lightning mode.

Agent can pilot his/her presence on Voice, Chat and Case channel in SALESFORCE and receive the right interaction according the Odigo rule for voice and Salesforce Omnichannel for digital interaction.

2.26.2.1 Agent side

Agent can use the ODIGO CTI or Omni Channel Interface to manage its presence on the right channel and receive the right customer interaction:

Whatever the choice agent made, the two-presence engine (Odigo and Omnichannel) are synchronized.

2.26.2.2 Supervisor Side

Supervisor can use ODIGO Supervision tab OR SALESFORCE Chat/Omni-Channel User tab to modify the agent status for the right channel:

2.27 ODIGO Supervision and Statistics in SALESFORCE [Update 10.16]

2.27.1 Real time Supervision

This feature requires that user has supervision rights in ODIGO.

It displays in real time the status of your call center (Agent or Traffic). It is available on Salesforce web and SALESFORCE1 Mobile interface.

2.27.1.1 Supervision Agent

The feature allows to supervise agent status, change it, record, listen and change the agent skills.

The screenshot shows the Odigo Supervision interface. At the top, there's a search bar and navigation tabs for 'Contact Center' and 'Odigo Supervision'. Below the navigation, there's a 'Template selection' dropdown set to 'Default', and buttons for 'New Template' and 'Update Template'. The main area displays a table of agent status with columns: Name, Agent status, Agent QoS, Inbound handled, and Outbound handled. The table shows two agents: 'office1 office1' with status 'Logoff' and 'Oliver Agent' with status 'Processing'. A sidebar on the right allows adding metrics, with options like 'Agent status', 'Agent QoS', 'Inbound handled', and 'Outbound handled'.

[Update 9.16] You can filter the list on agent name or some status. You can also exclude 'never logged' user.

You can add metrics to display and save them into a personal template that you can reuse another time.

Name	Agent status	Agent QoS	Agent status duration	Agent availability duration	Break duration	Break average duration	Inbound handled	Inbound total duration	Inbound average duration	Inbound processed	Inbound in fault	Inbound abandoned	Inbound longest duration	Outbound handled	Outbound average duration
Auto Test	Logoff	-	01:41:35	00:09:37	0	00:00:00	0	15:19:49	00:00:00	0	0	0	-	0	00:00:00
cedric2 cedric2	Logoff	100%	00:47:10	00:39:48	0	00:00:00	5	00:01:14	00:00:14	5	0	0	00:00:28	0	00:00:00
jor digital3	Logoff	-	01:36:44	00:58:38	1	00:08:19	0	00:00:00	00:00:00	0	0	0	-	0	00:00:00
office2 office2	Available	100%	00:47:36	18:00:20	0	00:00:00	9	00:00:06	00:00:06	9	0	0	00:00:03	1	00:00:04

Agent Supervision metrics available are:

- **Agent name:** Agent Odigo login
- **Agent QoS **:** Agent QoS (Odigo <=4.3: 66 or Odigo 5.X > 6/44-48)
- **Agent status:** Current Status (7)

- **Agent status duration:** Last current status duration (65)
- **Agent availability duration:** Maximum of availability time (51)
- **Inbound presented:** Number of inbound interactions presented (44)
- **Inbound handled:** Number of Handled inbound interactions (6)
- **Inbound abandoned:** Number of abandoned interactions (48)
- **Inbound in fault:** Number of interactions in fault (46)
- **Inbound total duration:** Inbound interactions duration (5)
- **Inbound average duration:** Average of inbound interactions duration (14)
- **Inbound longest duration:** Maximum of inbound interactions duration (57)
- **Break:** Number of Break (3)
- **Break duration:** Break Time duration (32)
- **Break average duration:** Average Break time duration (54)
- **Outbound handled:** Number of Handled outbound calls (63)
- **Outbound average duration:** Average of outbound calls duration (59)
- **Transfer requests:** Number of requests for transfer (62)

Optional Metrics are (Ask your project manager to activate them on ODIGO routing Engine):

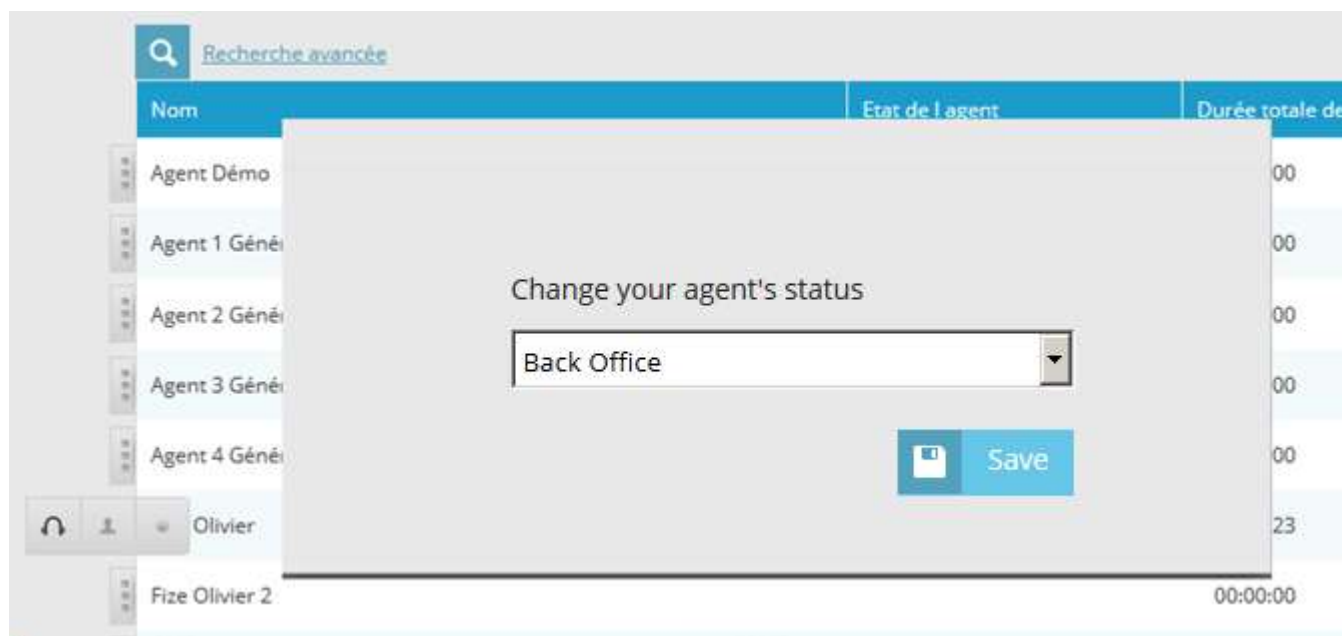
- **Agent log-ons:** Number of log-ons (2*)
- **Agent log-in duration:** Log-in time (4*)
- **Agent wrap-up duration:** Wrap-up time (13*)
- **Inbound alerting duration:** alerting time (8*)
- **Outbound calls duration:** Duration of outbound calls (224*)
- **Callback:** Number of callbacks made (64*)
- **Callback duration:** Duration of callback made (236*)
- **Transfer received and picked up:** Number of transfers received and picked up (367*)
- **Agent On-hold:** Number of On-hold (350*)
- **Agent On-hold duration:** On-hold duration (222*)

With the following buttons  you can:

- Change an agent status
- Record an agent conversation
- Listen to an agent
- Change agent's skills or template

Note: Listen and record actions are indicated by  on the agent line.

Agent status will display as follows:



Supervision is also available on SALESFORCE1 mobile application by selecting "supervision » item on menu and proposed the same functionality as above:



** Since Odigo > 5.x, you cannot add QOS metrics (66) in Odigo Supervision Table anymore: Salesforce is calculated QOS based on 6/44-48 Metrics.

2.27.1.2 Gate Supervision

Through this feature you can supervise the IVR gate, filtering the list by name or status.

You can also add metrics to Display and save them into a personal template that you can reuse another time.

Name	Gate QoS	Agents log in	Inbound in queue	Inbound handled	Inbound dissuaded	Inbound average duration	Inbound put in queue	Agents Available	Agents in break	Agents in wrap-up	Inbound in progress	Inbound received	Inbound abandoned	Inbound received direct	Agents in outbound calls	Transfer received	Transfer done
gr_salesforce_testauto	-	0	0	0	0	00:00:00	0	0	0	0	2	0	0	0	0	0	0
Salesforce Case	100%	1	0	7	0	00:00:02	5	1	0	0	0	7	0	7	0	0	0
Salesforce Case Priority One	-	1	0	0	0	00:00:00	0	1	0	0	0	0	0	0	0	0	0
Salesforce Chat	100%	1	0	6	0	00:00:09	0	1	0	0	0	6	0	6	0	0	0
Voice Demo	100%	1	0	1	0	00:00:03	0	1	0	0	0	1	0	1	0	0	0
Voice Golf	-	1	0	0	0	00:00:00	0	1	0	0	0	0	0	0	0	0	0
Voice Ski	-	1	0	0	0	00:00:00	0	1	0	0	0	0	0	0	0	0	0

Gate Supervision metrics available are:

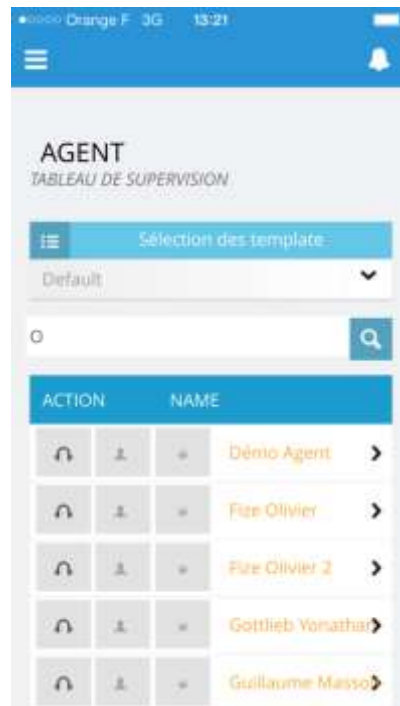
- **Gate name:** Name of Odigo Gate
- **Gate status:** Gate Status (1)
- **Gate QoS **:** Gate QoS (Odigo <=4.3: 93 or Odigo 5.X > 91/20)
- **Inbound received:** Total of inbound interactions received (91)
- **Inbound abandoned:** Total of inbound abandoned interactions (76)
- **Inbound dissuaded:** Total of inbound interactions in fault interactions (21)
- **Inbound put in queue:** Total of inbound interactions with waiting (34)
- **Inbound average duration:** Average inbound duration (24)
- **Inbound received direct:** Number of inbound interactions received directly (90)
- **Inbound handled:** Total of interaction handled (20)
- **Inbound duration:** Inbound interactions time duration (22)

- **Inbound in progress:** Number of current inbound Interactions (37)
- **Inbound in queue:** Number of current waiting Interactions (18)
- **Agent log-in:** Number of agents currently logged (17)
- **Agent available:** Number of agents currently available (35)
- **Agent in break:** Number of agents currently in break (36)
- **Agent in outbound calls:** Number of agents currently doing outbound calls (77)
- **Agent in wrap-up:** Number of agents currently in wrap up (43)
- **Transfer done:** Number of requests for transfer (75)

Optional Metrics are (*Ask your project manager to activate them on ODIGO routing Engine):

- **Inbound estimated waiting duration:** Estimated waiting duration (385*)
- **Inbound average waiting duration:** Average waiting duration (30*)
- **Inbound disturbances:** Number of disturbances (226*)
- **Agent in callback calls:** Number of agents currently doing callback (78*)
- **Callbacks validated:** Number of callbacks validated (141*)
- **Callbacks awaiting:** Number of callbacks awaiting handling (152*)
- **Transfer received:** Number of transfer interactions received. (86)
- **Transfer successful:** Number of successful transfers (144*)

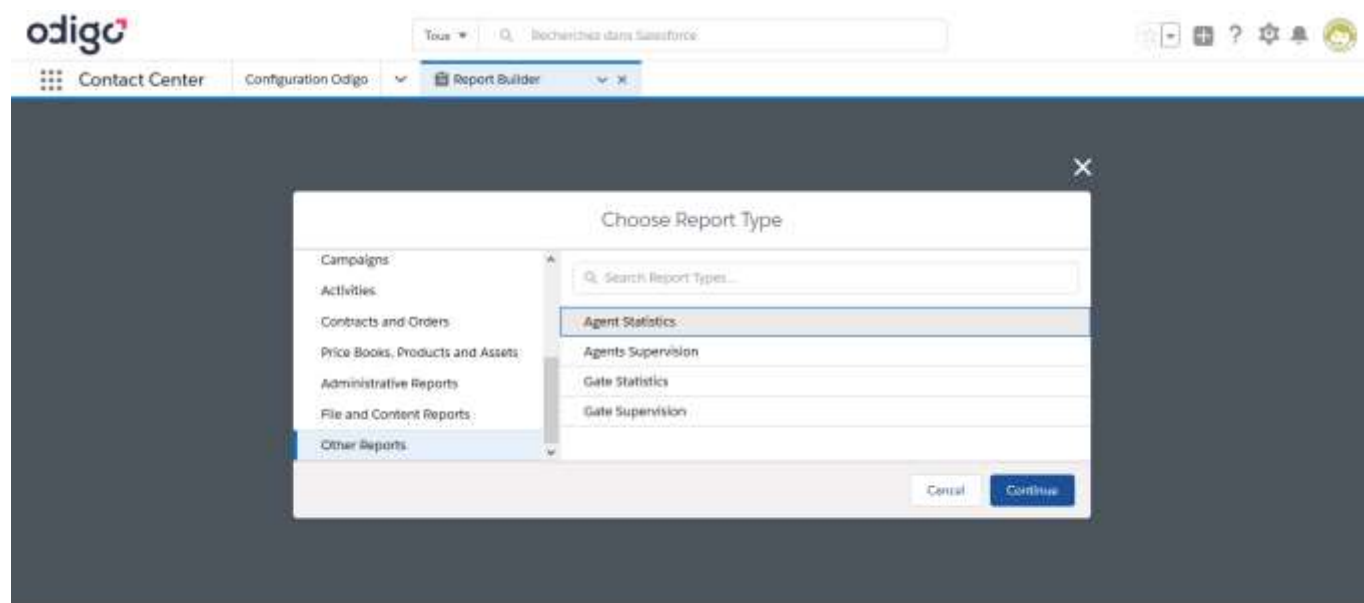
Note: Supervision is also available on SALESFORCE1 mobile application by selecting "supervision » Item in Menu and proposed the same functionality as above:



** Since Odigo > 5.x, you cannot add QOS metrics (93) in Odigo Supervision Table anymore: Salesforce is calculated QOS based on 91/20 Metrics.

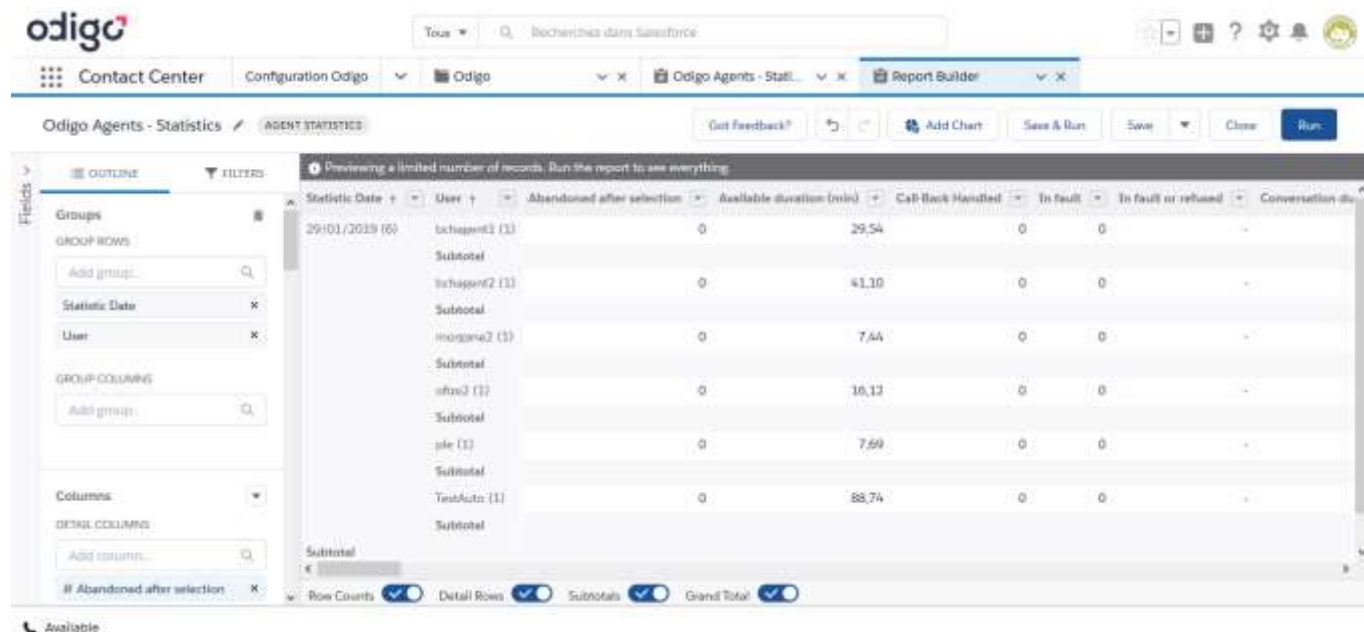
2.27.2 ODIGO Statistics in SALESFORCE [Update 10.21]

4 ODIGO report types are available in SALESFORCE report Type (Agent or Traffic).



- 1) With the 2 statistic objects « Agent » and « Gate » you can create a report day by day.
- 2) With the 2 supervision objects « Agent » and « Gate » you can create report on the current day

You can use the drag and drop interface to compose your own report:





Agent Statistics metrics available are:

For the Current Day « Agent Supervision » Object	For Each Day « Agent Statistics » Object
• Date/Time • Agent Odigo Login • Agent QOS (6/44-48) • Number of Inbound interactions (6) • Number of inbound interactions selections (44) • Number of inbound interactions abandoned (48) • Number of inbound interactions in fault (46) • Inbound total duration (5) • Inbound average time (14) • Inbound longest duration (57) • Number of outgoing calls (63) • Outbound average conversation duration (59) • Agent availability duration (51) • Agent number of breaks (3) • Agent total break duration (32) • Agent average break duration (54) • Agent Last Status (7) • Agent Last Status Duration (65)	• Date • Agent ODIGO Login • QOS Agent (113/200) • Number of selection (200 or 10200) • Number of handled interactions (113 or 10113) • Number of abandon interactions after selection (107-10107) • Number of interactions in fault or refused (144 or 10144) • Number of interactions in fault (59 or 10059) • Number of interactions Refused (96 or 10096) • Number of Rigging calls < 10s (187) • Number of Rigging calls > 10s (191) • Rigging calls duration (52) • Number of transfer request (206 or 10206) • interactions duration (47 or 10047) • Number of wrap up (100) • Wrap up Duration (43) • Number of outgoing calls (197) • Outbound call duration (56) • Number of Callback calls (182) • Available Time (7) • Logoff Hour (1) • First logon Hour (2 - Mandatory!) • Logon Time (10) • Number of logons (63) • Number of breaks (66) • Maximum Break duration (3) • Break Duration (40) • Number of breaks 1 to 30 (69..., 672) • Break duration 1 to 30 (13...,642)



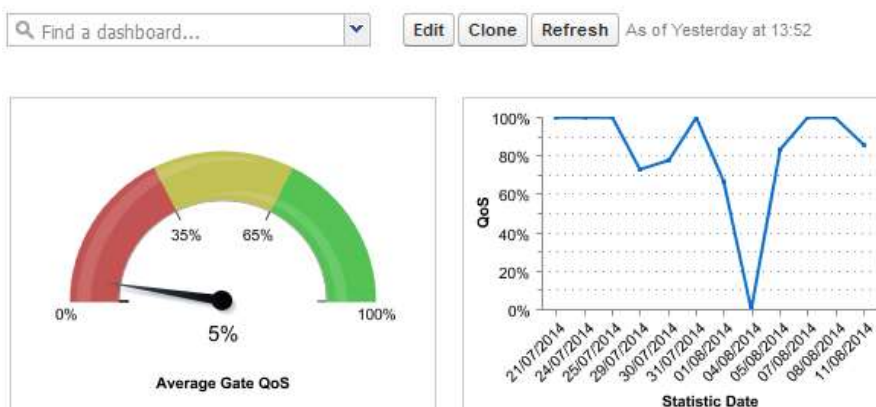
Gate Statistics metrics available are:

For the Current Day Object « Gate Supervision »	For Each Day Object « Gate Statistics »
• Date/Time • Gate Name • QOS (91/20) • Number of inbound interactions (91) • Number of inbound handled interactions (20) • Number of inbound waiting interactions (18) • Number of inbound currently waiting interactions (34) • Number of inbound abandoned interactions (76) • Number of inbound dissuaded interactions (21) • Number of inbound current interactions in progress (37) • Average Inbound interactions Duration (24) • Number of agents in wrap up (43) • Number of agents connected (17) • Number of agents available (35) • Number of agents in outgoing call (77) • Number of agents in callback call (78) • Number of agents in break (36)	• Date • Gate Name • Number of Incoming interactions (104) • Number of Incoming interactions Direct (143) • Number of Incoming interactions Overflow (133) • Number of Incoming interactions transfer (105) • Number of Incoming interactions handled (116) • Incoming interactions duration (48) • Average Incoming interactions duration (48/104) • Maximum Waiting time (6) • Average Waiting Time (46/112) • Number of abandoned interactions (106) • Number of abandoned interactions < 1 mn (141) • Number of abandoned interactions entre 1 et 3 mn (140) • Number of abandoned interactions > 3mn (142) • Duration of abandon (277) • Number of dissuaded interactions (134) • Number of dissuaded on agent not login in (135) • Number of dissuaded on closed Day (136) • Number of dissuaded on closed Hour (103) • Number of dissuaded on day off (138) • Number of dissuaded on special day (139) • Number of dissuaded on waiting queue (137) • Number of dissuaded on closing queue (211) • Number of waiting interactions (112) • Duration of waiting time (46) • Number of refused (98) • Number of transfers (209) • Number of Overflow to... (132) • Number of interactions in fault (61) • Number of interactions in fault refused by agent (147) • Number of callbacks store (186) • Number of callbacks already store (180) • Number of callbacks done (184) • Number of callbacks canceled (179) • Number of callbacks to go/retry (196) • Number of callbacks refused (195) • Duration of Handling Time (378) * • Handled Total duration • Abandon Total duration • Waiting Total duration

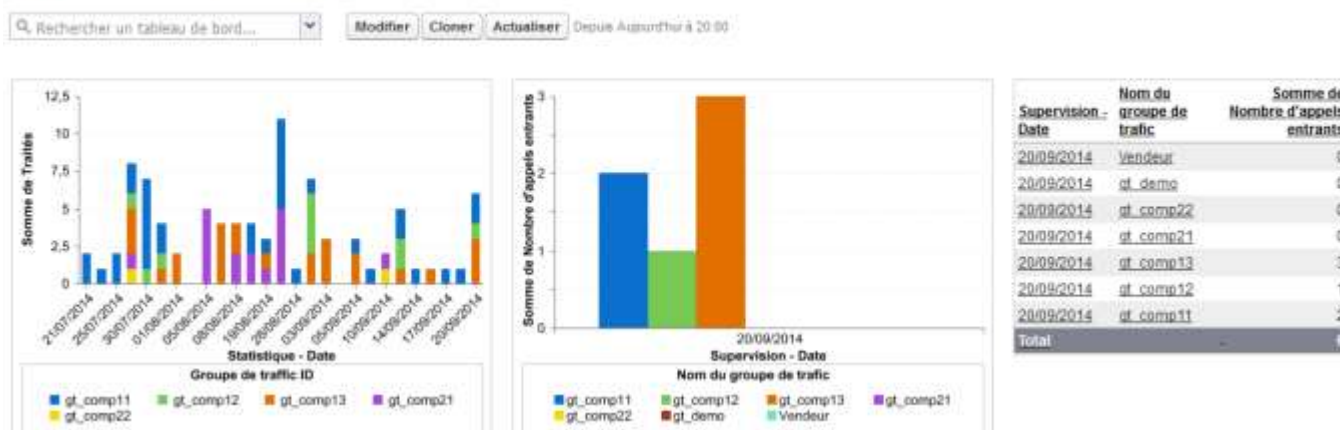
*Optional Metrics are (Ask your project manager to activate them on ODIGO routing Engine)

You will find several report and dashboard examples in the connector package:

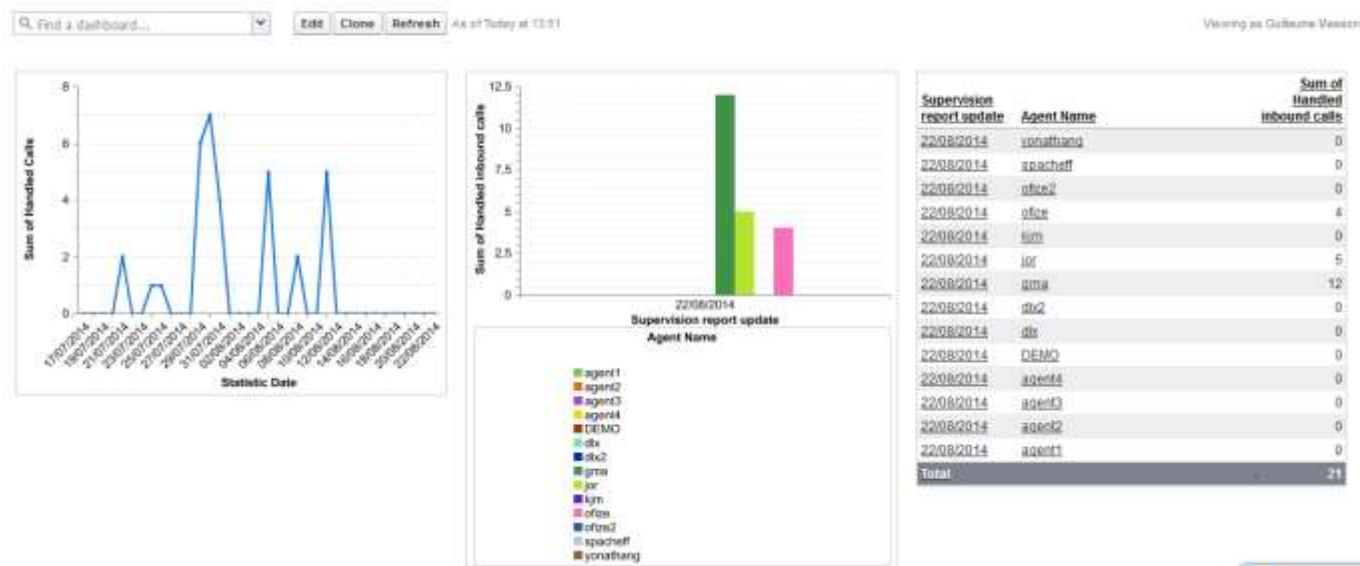
Gate QoS Sup/Stat



Gates IncomingCalls Dashboard



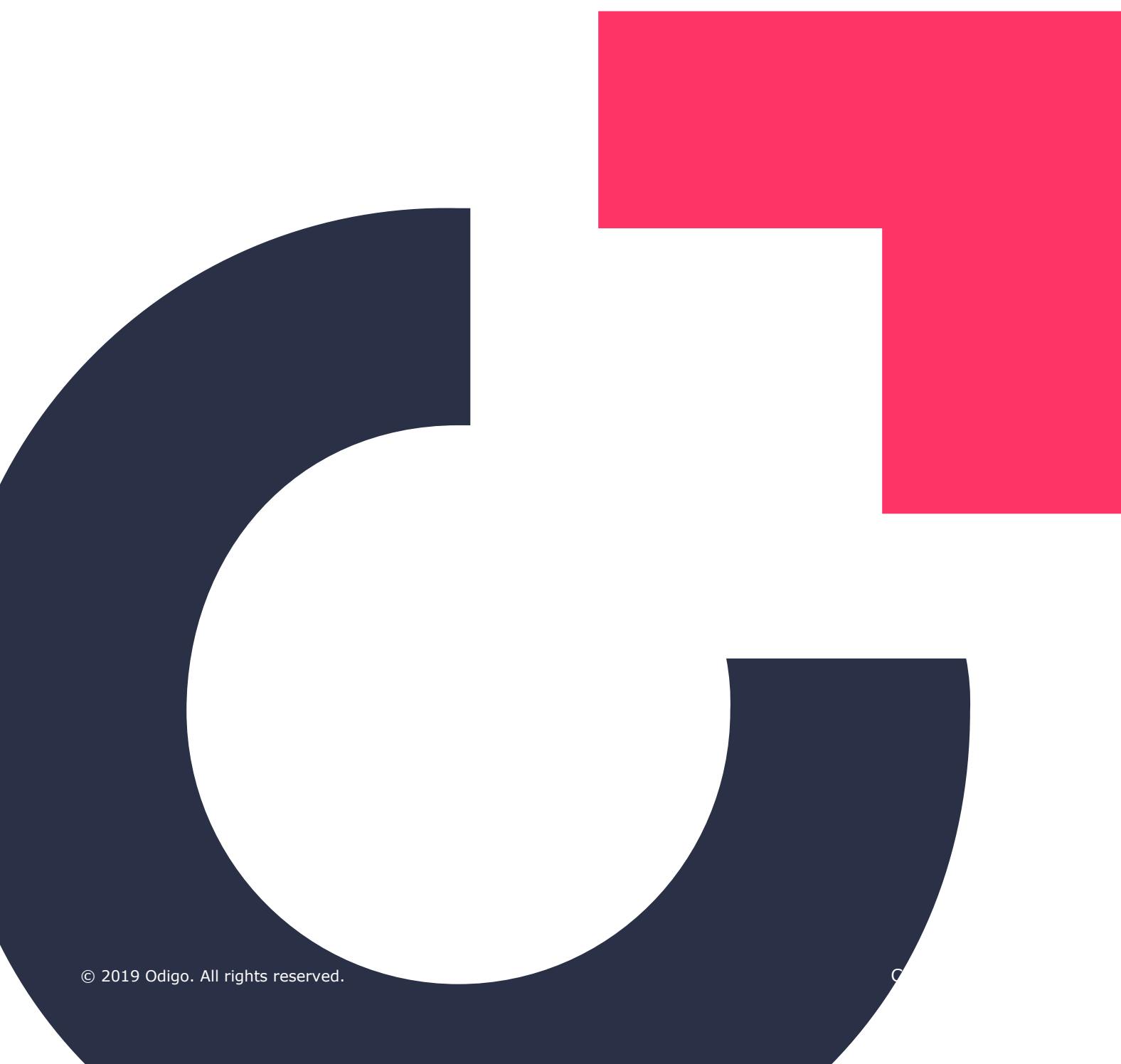
Agents HandledCalls DashBoard



Note: Data are refreshed at regular interval, depending on your Salesforce Administrator Configuration (1 hour or more)

Of course, all these dashboards are visible in SALESFORCE 1 mobile application:





A large, solid pink L-shaped graphic that extends from the top right towards the center of the page.

About Odigo

Odigo helps big organizations connect with individuals through world-class, cloud-based contact center solutions. Our cutting-edge, proprietary technologies enable a seamless, efficient, omnichannel experience for your customers and a satisfying, engaging experience for your service agents.

Odigo serves more than 400,000 agents and business users globally. With a 25-year history of industry firsts, Odigo has more than 350 clients around the world.

Odigo is a Capgemini brand, which means we benefit from the scale and expertise of one of the world's foremost providers of consulting, technology services and digital transformation.

Visit us at:

www.odigo.com