User Manual

CTI Plugin

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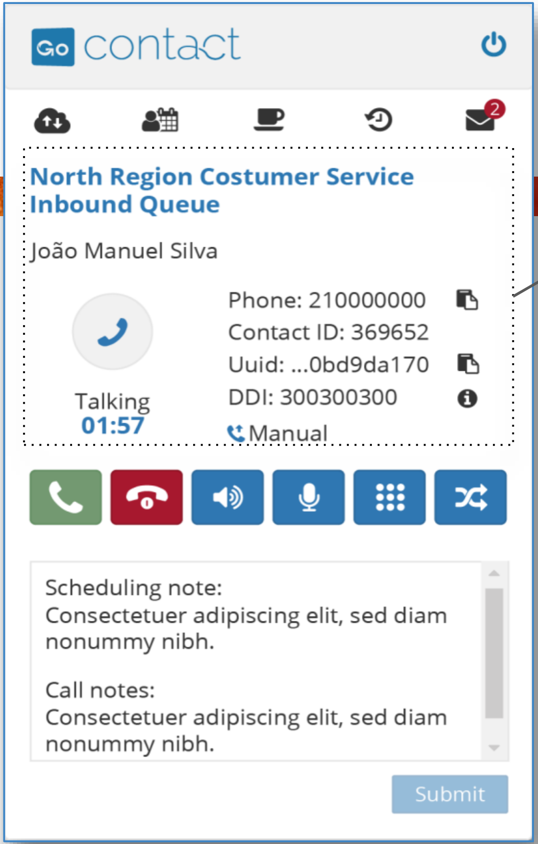
GoContact CTI Plugin for Salesforce

The Plugin has been completely designed from scratch in order to enhance the small layout and maximize its functionality in the agent's view.

Integration with the Salesforce platform provides automations to daily business and agent processes, contextualizing interactions with their Salesforce customers, keeping them as customer cases.

It can also reflect the status of the agent in Salesforce (busy, free, etc.), and depending on its status, it also allows the agent to initiate calls (Click2Dial) directly from Salesforce to the GoContact Plugin.

Functionalities



Agent Call Context

Context information available to the agent such as Work Queue, Customer Name, Phone Number, DDI Used, Call Type, and more.

Work Queue Management

The agent can change Outbound Campaigns and Inbound Queues at any time.

Personal Callback Management

List of the agent personal callbacks, where the agent can initiate the call or cancel the callback.

Breaks Management

Display of all available breaks. If necessary, sending requests to supervision for their autorization.

Manual Calls

Ability to make manual calls and load calls in Preview and only then call to the customer.

Call Transfers

Call transfer manager for other work queues, internal IVRs and external numbers.

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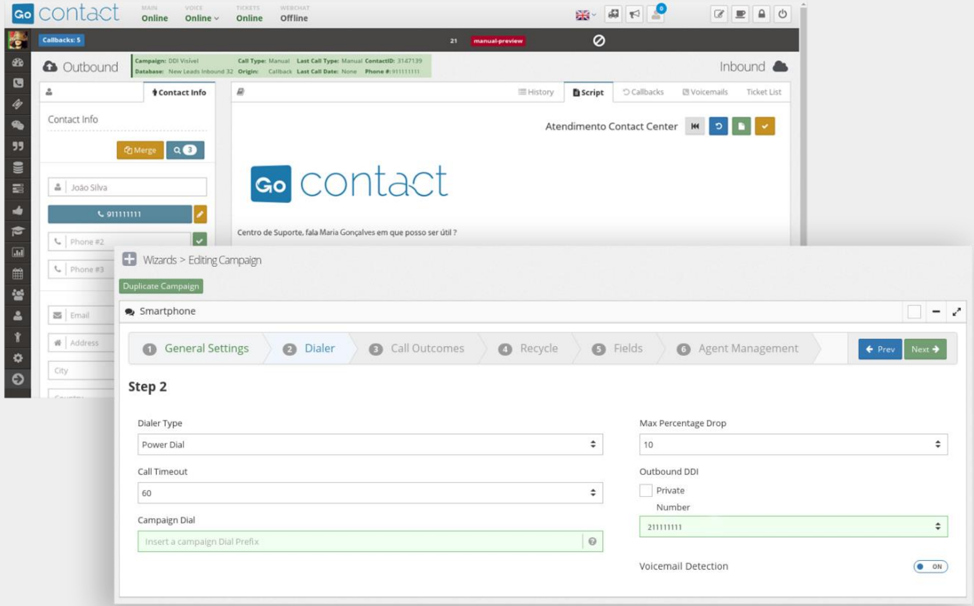
Prerequisites and Configuration

Work Queue Configuration

GoContact Platform

The CTI Plugin is a new way to work on the GoContact Voice Channel. The agent will need to configure both Inbound and Outbound work queues on the platform so that Agents logging in can register with those queues.

The entire operation management is performed on the GoContact platform: work queues operating hours, available breaks, Database management, etc.



Voice Channel Login

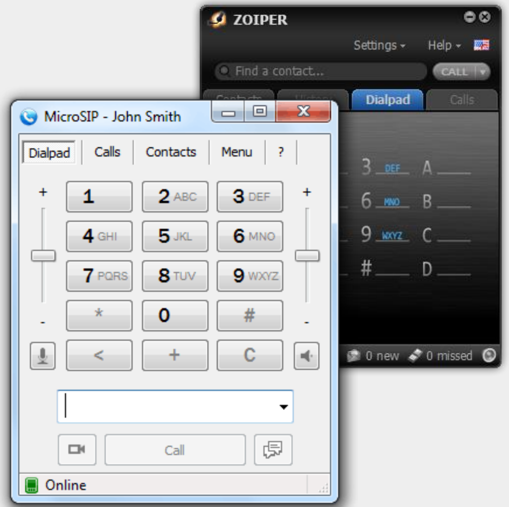
Phone Extension Registration

In order to login on the GoContact CTI Plugin for Salesforce it is necessary to have a phone extension set up and registered with a Physical Console or Softphone on your computer.

This configuration data is domain specific and should have been provided by the GoContact Operations Team.

There are currently several Softphone providers on the market and any of them can be used as long as they meet GoContact functional requirements.

From the experience gained in passed projects, GoContact recommends the use of Softphone MicroSip for its quality and stability, but there are others that can be better adapted to your operation.



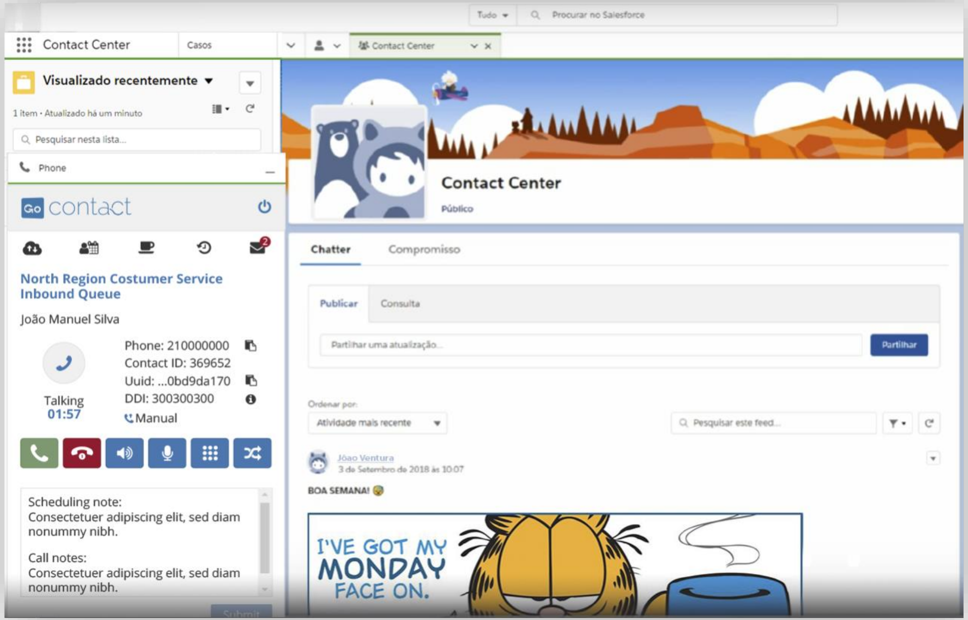
Agent Login

Access to the Plugin

Utility Bar

The plugin was developed for the Lightning version of Salesforce and is contained within the platform in the utility bar at the bottom left corner.

Whenever desired, it is possible to minimize or maximize the CTI Plugin as it remains active while logged in.



Voice Login

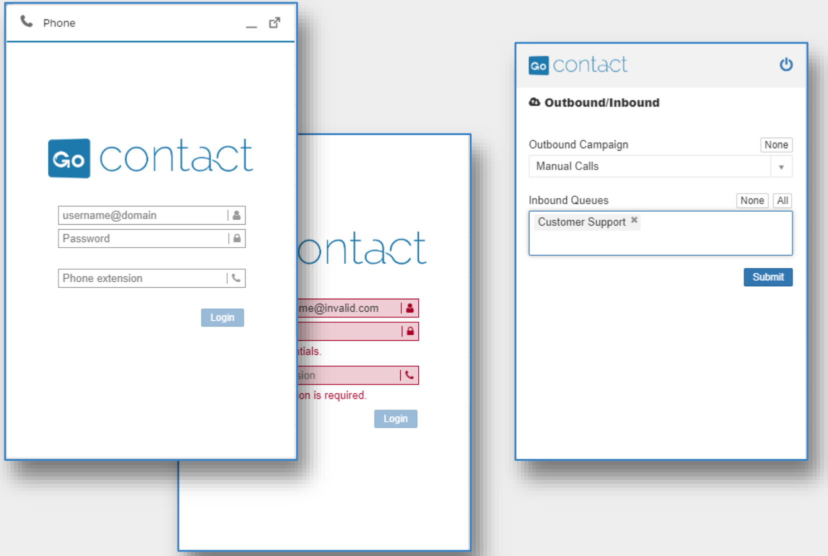
Login Process

Since the CTI Plugin only manages the GoContact voice channel, the agent will need to login indicating the telephone extension for immediate agent registration.

Any error with user data or extension registration is indicated here.

After login, the work queue management panel is displayed, where the Agent must indicate at least one in order to register and be able to start working.

The Agent completes the login process only after successfully registering in the work queues.



Main Panel

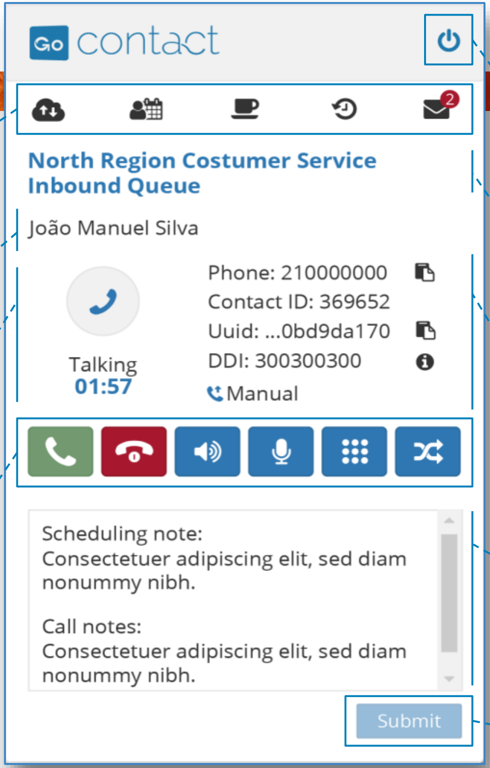
Panel Navigation and Details

Access to Agent Management Menus

Calling Customer Name

Agent Status and its duration

Call Action Buttons



CTI Plugin Logout

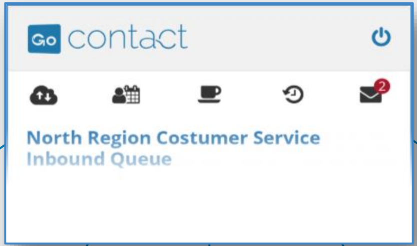
Call Context Work Queue

Call Details

Call Notes Field

End call and submit data

Agent Management Menus



Access to Work Queue Management Panel where the Agent chooses which queues he is currently working on

Platform Notifications Panel with system warnings, break requests and user messages

Agent Personal Callback Management Panel, where it is possible to cancel a scheduled call

Agent call history listing panel with call date and context detail

Agent Break Management Panel, where you can view and activate those available

Call Action Buttons

Answer or initiate a call
Here the agent must answer incoming calls or initiate a manual call.

End call or CSAT
Here the agent is able to disconnect the call. If the CSAT transfer action is active, it will be transferred instead of disconnected.

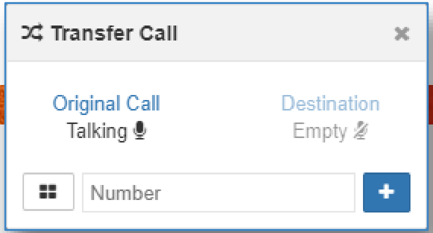
Call Volume Control
The agent can control the call volume to improve audio conditions.

Place customer *On Hold*
By pressing this button the agent places the customer *on hold* and the preset audio is played.

DTMF Sound Panel
If the Agent makes a call and comes across an IVR, it is possible to navigate using the number panel.

Call Transfer
Ability to transfer calls to other work queues, IVRs or external numbers.

Call Transfer



Destination Type

In the transfer panel we have the destination type where the agent must indicate the desired option. Only after indicating the destination type, the agent must indicate the number, the Work Queue or the internal IVR of the GoContact Platform.

- **For Remote Number:** When you want to make a call to an external number.
- **For Work Queue:** Tracking the customer to the desired Inbound Queue.
- **For Internal IVR:** Transferring the customer to the satisfaction survey (CSAT), for example.

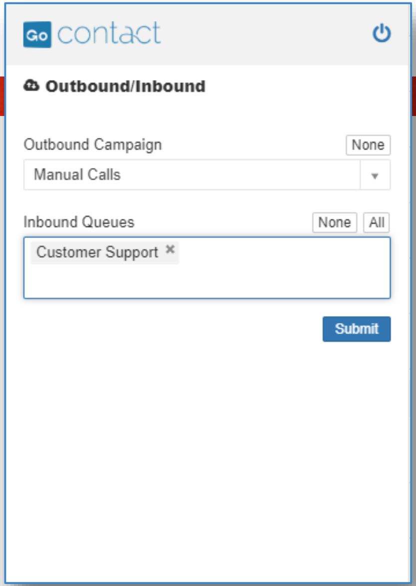
Call Options

Different transfer options are allowed depending on the destination type and call status, for example to put a call on hold and to switch between the two you must click on the call status .

- Assisted call to second line.
- Immediate transfer to second line.
- End call for second line.
- Initiate a conference call between the customer and second line.

Work Queue Management

Outbound and Inbound Registration



Agent Work Management

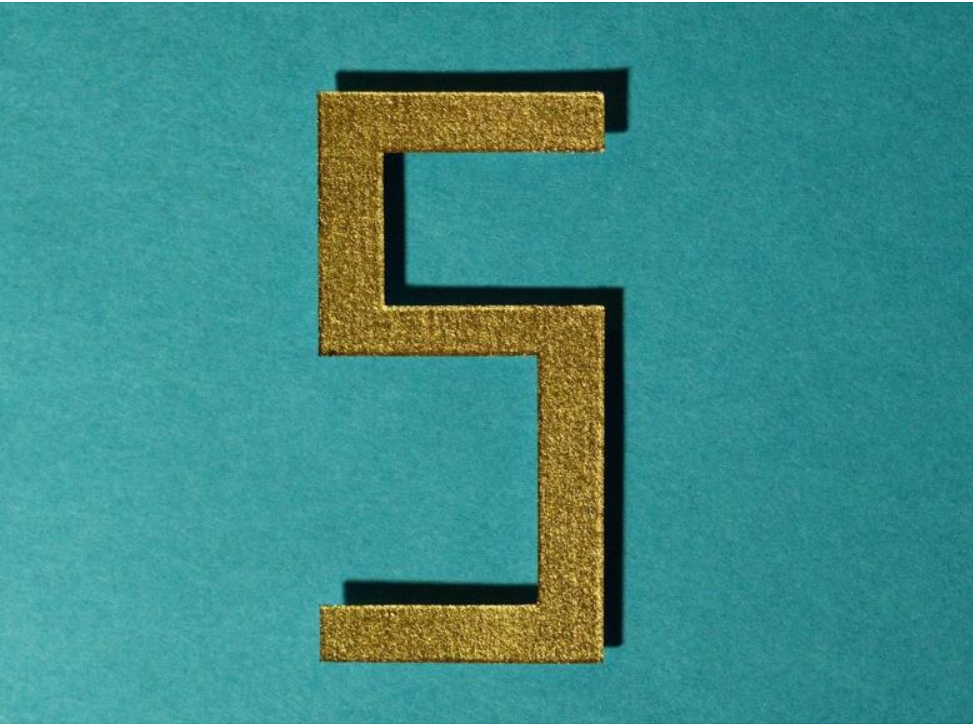
To be logged into the Voice channel, the agent must be registered in at least one Inbound or Outbound work queue.

Whenever it is necessary to change work queues, the agent can do so on this panel, and these changes will take effect as soon as the agent is ready.

For Outbound, the agent can only be registered in one Campaign whether it is manual or automatic.

For Inbound, the agent can select any queues that are available, and if the agent wants to add more queues, he must do so through the GoContact platform.

For Inbound, the agent may have fixed work queues so they cannot be changed. If necessary, the supervisor can disable the Force Inbound Queues feature in the agent profile.

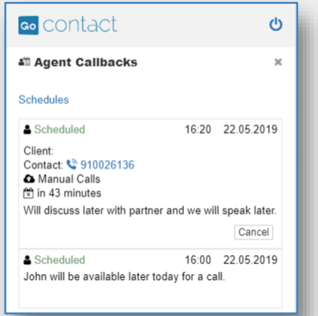


Personal Callback Management

Make a Customer Callback

Scheduling Context

The callback management panel displays a temporal listing of all callbacks scheduled exclusively for the agent.



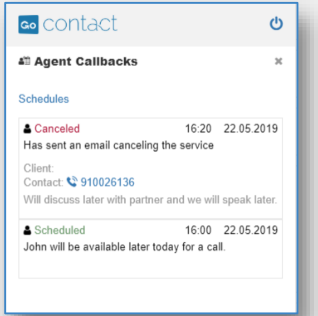
You can select and expand a callback to see its context in more detail, and by hovering over the agent icon, it indicates who created the callback schedule and at what time and date.

Cancel or Make a Callback

From this interface you can click on the customer's phone number which is displayed in blue and initiate a manual call in preview mode to the customer.

It also allows the agent to cancel the selected callback; however, you will need to indicate the reason for its cancellation.

This cancellation message will be visible in the list.



Agent Break Management

Break Types

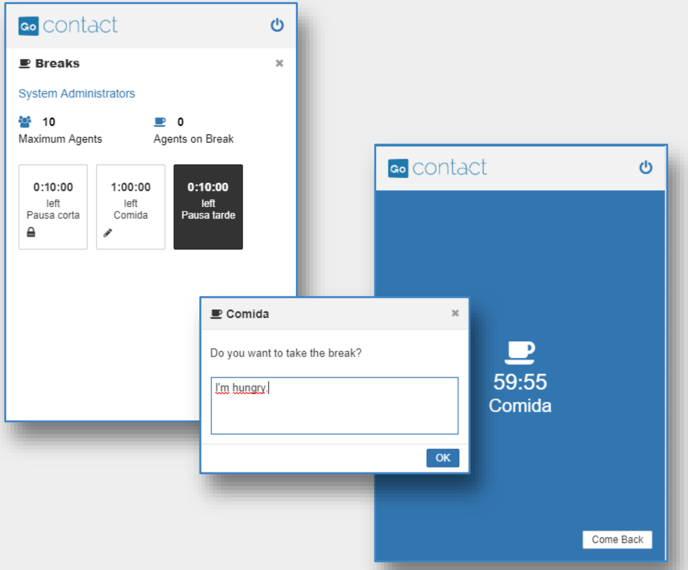
Break Availability

All breaks configured for the group are displayed here, as well as the number of agents within the group currently in a break and the maximum number of agents in a break at the same time.

Light-marked breaks are available for selection, and the dark-marked indicate that they are out of permitted hours.

In each one the agent can check the remaining time available, its description and also its attributes with the following indication:

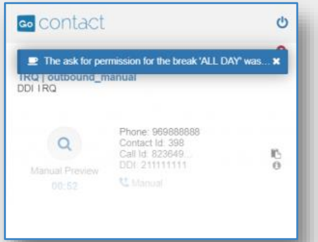
- Requires authorization from Supervisor
- Forces to leave a comment
- The break is counted on working hours



Manage Agent Breaks

On Call Break Request

When there is a call increase, the time between closing one call and initiating another is greatly reduced. If the agent wants a break, it can be activated or requested while on call.

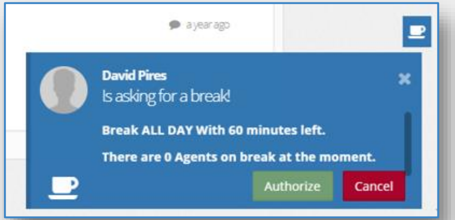


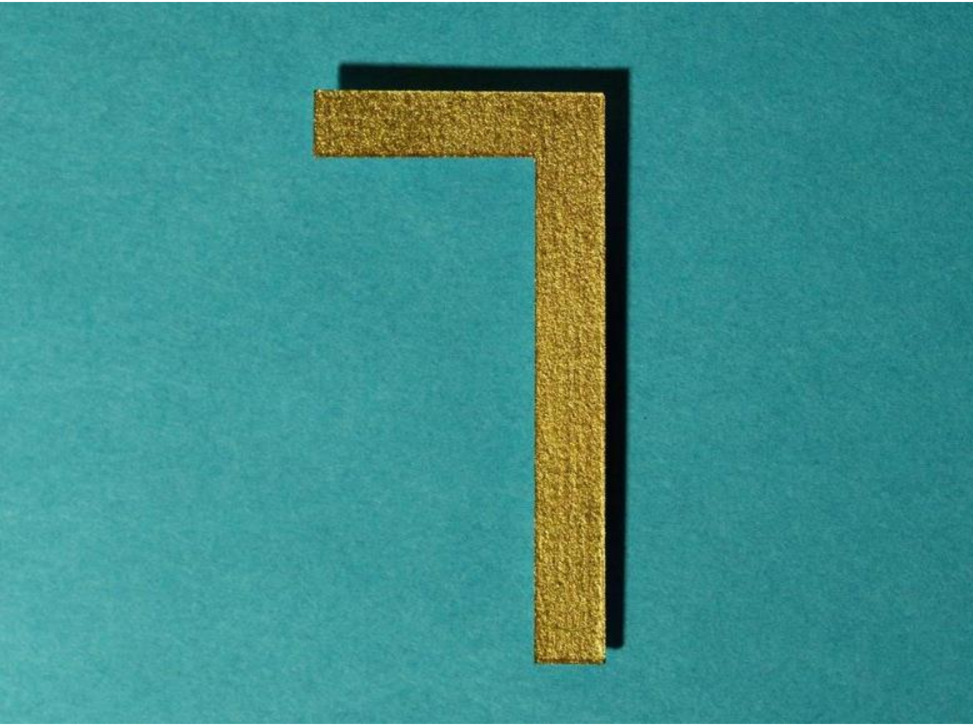
At that point, the agent will receive a notification indicating that the break will start as soon as the call ends, thus preventing from starting a new call.

Supervision Authorization

Breaks that require Supervision permission may also be requested at any time. When the request is made, the breaks are pending until they are processed. The break is only enabled after authorization.

These break request interactions are displayed to the agent in the notification panel, both the request indication and the supervisory response.





Call History and Notifications

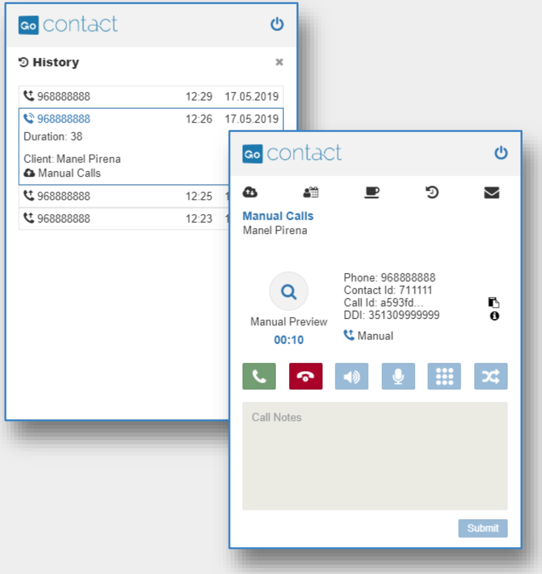
Agent Call History

Call History Details

The call history panel allows agents to check their latest calls where it is possible to see the call details, like customer name, context/campaign in which the call was made, the date, time and call duration.

The agent, as in the callback manager, can start a manual call directly from the listing by clicking on the customer's phone number displayed in blue.

Calls initiated from these panels are always launched in Manual Preview mode, allowing the agent to check customer data before starting the call.



Notifications and Messages

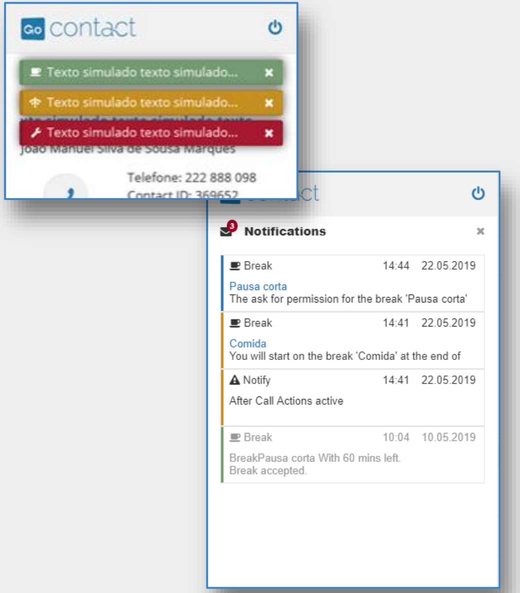
Notifications Types

Notifications are displayed to the agent with a banner on the call panel for 3 seconds and disappear automatically, however they can always be viewed in more detail in this menu.

Notifications are classified into 5 groups and 4 colours:

- Breaks
- Personal Message
- General Message (*Broadcast*)
- Connectivity
- System

- **Blue** - Informative
- **Green** - Success and Messages
- **Yellow** - Warning
- **Red** - Error



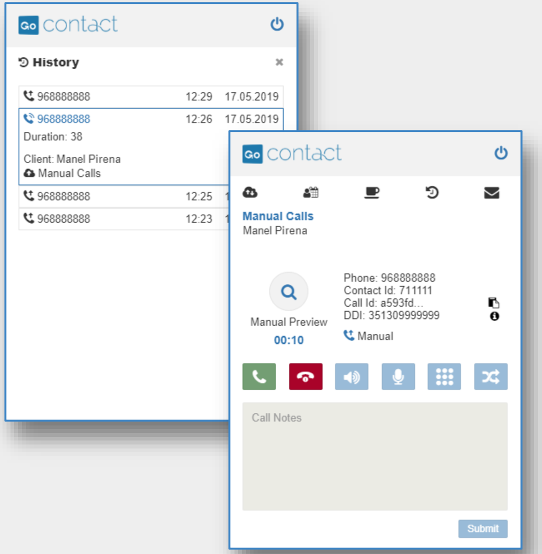
Click2Dial and Multitab Session

Agent Interactions with Salesforce

Click2Dial in Salesforce

Just as a contact is loaded to start a call from the call history or from the callback manager in the CTI Plugin, it can also be started from Salesforce.

Depending on the agent status in GoContact, which should be “Ready”, in Salesforce, whenever a contact field is identified, it is displayed in blue with a Phone icon beside it. By clicking on the number it will load directly into the CTI Plugin to start the call.



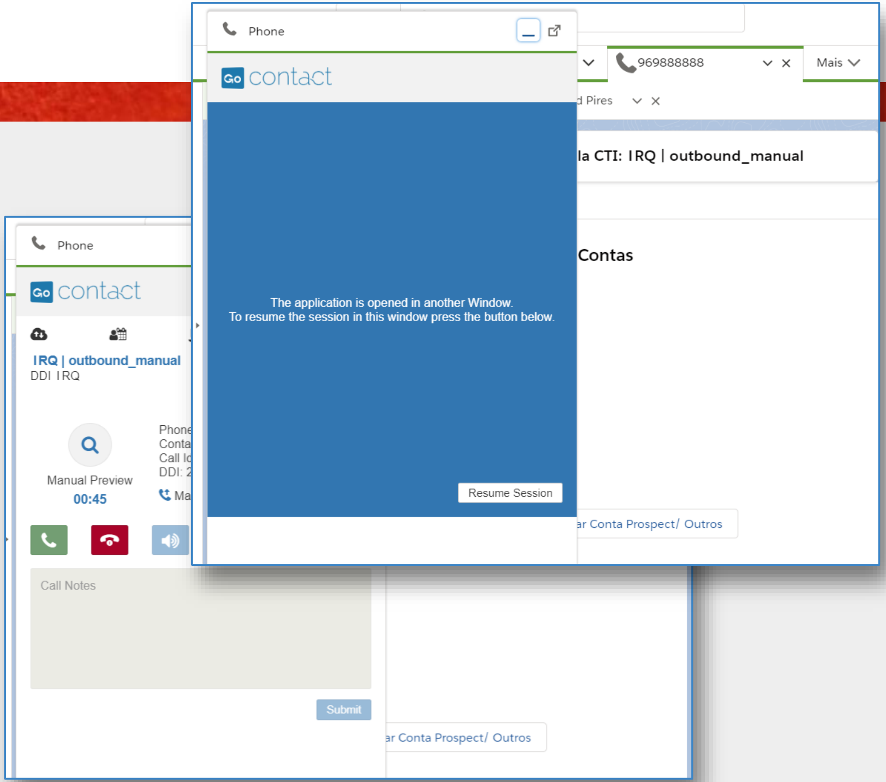
CTI Plugin Session Management

Multiple Tabs and GoContact Session

There is sometimes a need to have multiple tabs open in Salesforce, and as such it is necessary to maintain CTI Plugin agent and interface status.

GoContact allows the agent to do this management, taking into account, for example, when a window is accidentally closed or a new one needs to be opened from Salesforce, the agent will only need to open the plugin in the new window and it will show that the session is opened in another window.

In this scenario the agent may reload the session in the new window and close the previous one or simply return to the original window.



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