

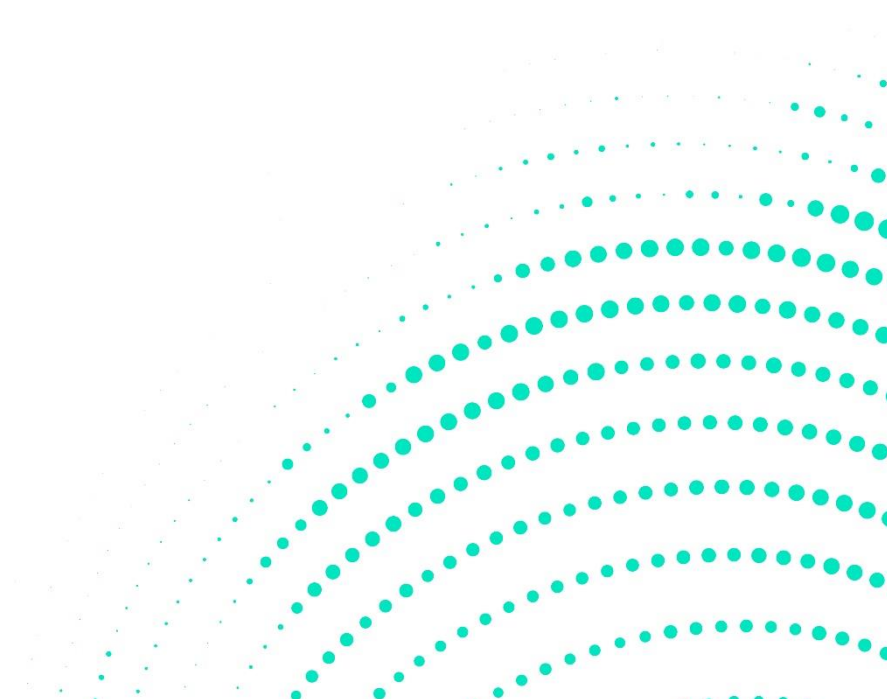


Cloud Contact Center



Salesforce integration - basic manual

29/06/2020





ÍNDICE

1.	Introduction	3
2.	Assigning users to the masvoz call center entity	3
3.	Integrating masvoz Cloud Contact Center in your apps	3
4.	Using masvoz Cloud Contact Center	3



1. Introduction

This document contains the basic instructions for configuring masvoz Cloud Contact Center integration with Salesforce.

Please note that, a valid masvoz Cloud Contact Center subscription is required in order to use the product. A service contract needs to be signed by the client and there is a monthly fee per masvoz Cloud Contact Center agent in addition to the fee paid for the integration with Salesforce. For details please contact: crm@masvoz.es or call +34931220705.

2. Assigning users to the masvoz call center entity

After installing from AppExchange a call center is created and users can be assigned to it. Steps to follow:

1. Open Setup
2. In the left side menu go to:
PLATFORM TOOLS > Feature Settings > Service > Call Centers
3. Select the Call Center clicking over its name: "Masvoz Call Center"
4. Select "Manage Call Center Users"
5. Add or remove users from the list

3. Integrating masvoz Cloud Contact Center in your apps

Follow the steps below in case of not having an "Open CTI Softphone" already integrated in the utilities bar:

1. Open Setup
2. In the left side menu go to: PLATFORM TOOLS > Apps > App Manager
3. Select a Lightning App. Search for an arrow-shaped button on the right and press it.



4. In the dropdown, press "Edit" and Lightning App Builder will open with the selected app pre-loaded.

5. In the left side menú open the "Utility Bar" option.

6. Add an item and select "Open CTI Softphone"

7. Dentro de la App, en la barra de utilidades inferior, verá el acceso que

permite desplegar Masvoz Webphone. Inside the App, the bottom utility bar will allow displaying masvoz Cloud Contact Center.

4. Using masvoz Cloud Contact Center

It is possible to make and receive calls from Lightning apps that have masvoz Cloud Contact Center integrated in their utilities bar.

Access credentials will be requested for every new session. Those credentials will be provided by masvoz after signing a Cloud Contact Center contract.

When there is an incoming or outgoing call if there is an existing case associated to the number, it will be opened.

If there is no registered case for the phone number, a form will automatically open to fill out the details of a new case. The new case will be associated to an existing contact and/or account if they exist and the number is linked to them.

It is possible to make outgoing calls to phone numbers displayed on Salesforce by clicking on them.