PhoneIQ

PhoneIQ Salesforce Guide

Index

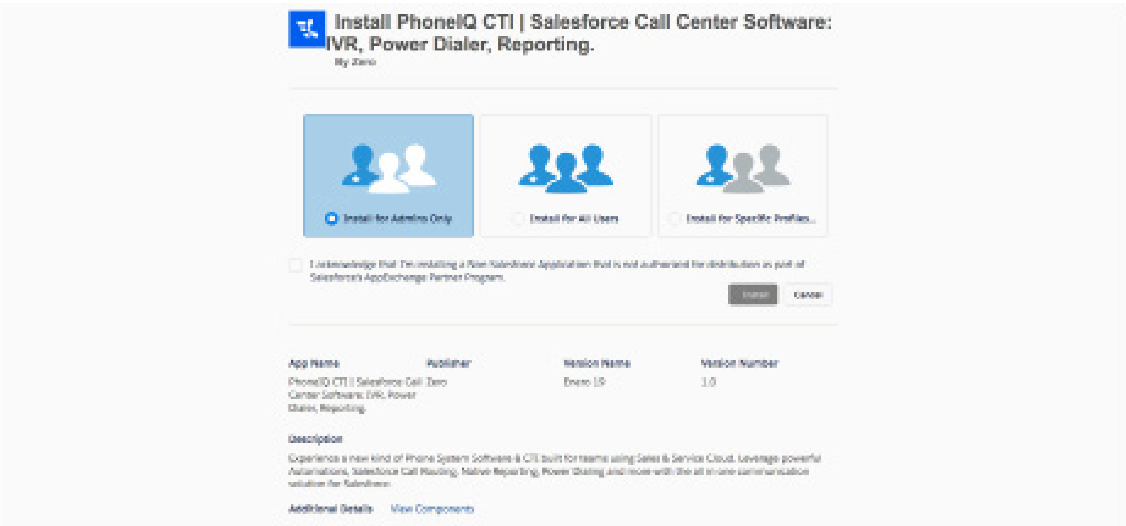
1. Installing PhoneIQ for Salesforce

1.1 Download PhoneIQ for Salesforce

Locate the PhoneIQ for Salesforce package on the Salesforce AppExchange and install it by clicking “Get It Now”.

1.2 Select Salesforce profiles

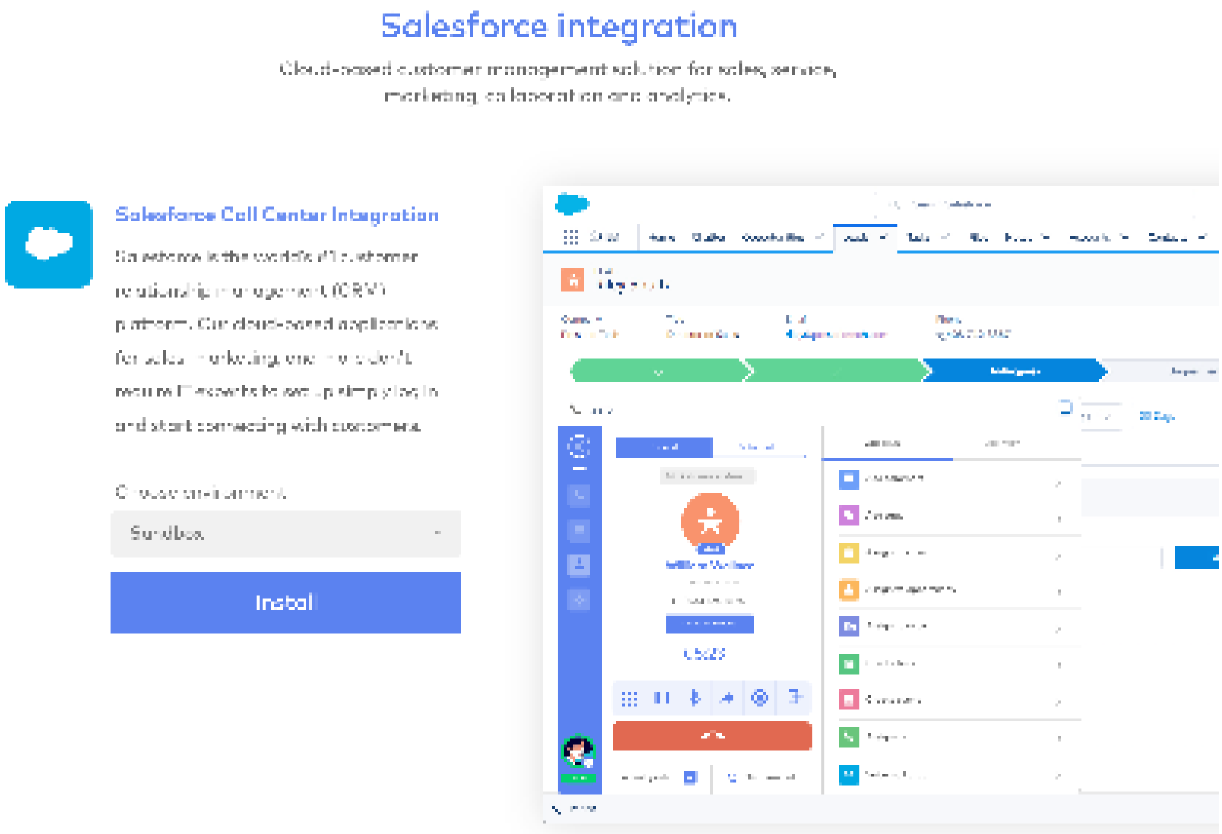
Select to which Salesforce profiles you would like to install PhoneIQ for Salesforce and click “Install”. We recommend installing PhoneIQ for System Administrators only, since you’ll be able to grant access to users at a later step in the configuration process.



2. Connecting PhoneIQ and Salesforce

Once the PhoneIQ for Salesforce package is installed in your Salesforce Org., the next step is to visit the PhoneIQ administrator portal and navigate to the “Integrations” view within the Integrations App and select “New Integration”. This is required to ensure PhoneIQ has the necessary permissions to perform remote operations via the API. Choose the Salesforce environment where you want to install PhoneIQ and click “Install”. A new browser tab will open, requesting your Salesforce login credentials. If you have already authenticated with Salesforce in the same browser session, credentials won’t be required.

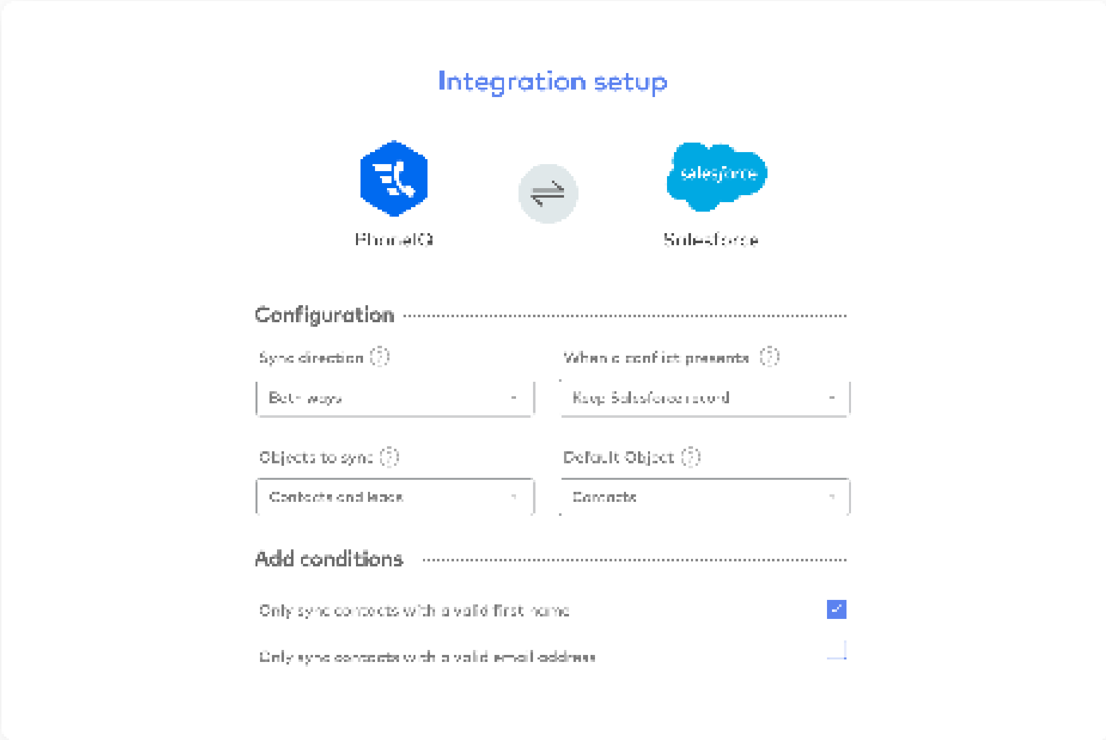
IMPORTANT:
Make sure your Salesforce account has it's API enabled. API access is provided with the Enterprise and Unlimited license by default. If you have the Professional license please contact your Salesforce Account Executive and request to have the API enabled (take into consideration that the API is a paid feature with the Professional License).



3. Contact Sync

3.1 Initial Sync

Within the Integrations App, navigate to the Contact Sync view and select "Start Sync". Choose Salesforce as the platform to sync contacts and proceed to the setup. Here you'll be presented with a variety of options:



Sync Direction:

Both Ways: Enables Bidirectional Contact Sync

PhoneIQ to Salesforce: Pushes contact updates from PhoneIQ to Salesforce

Salesforce to PhoneIQ: Pushes contact updates from Salesforce to PhoneIQ

When a conflict presents:

Keep Salesforce Record: If different contacts are found to share the same phone number, the Salesforce record will be preserved and updated in PhoneIQ.

Keep PhoneIQ Record: If different contacts are found to share the same phone number, the PhoneIQ record will be preserved and updated in Salesforce.

Objects to sync:

Contacts and Leads: Will sync both contact and lead records with PhoneIQ.

Contacts: Will sync only contact records with PhoneIQ.

Leads: Will sync only lead records with PhoneIQ.

Default Objects:

Contacts: Create a contact object in Salesforce when a PhoneIQ contact is synced and the Salesforce object type is not specified.

Leads: Create a lead object in Salesforce when a PhoneIQ contact is synced and the Salesforce object type is not specified.

Only sync contact with a valid email address:
Will only sync objects between platforms that have a valid email address.

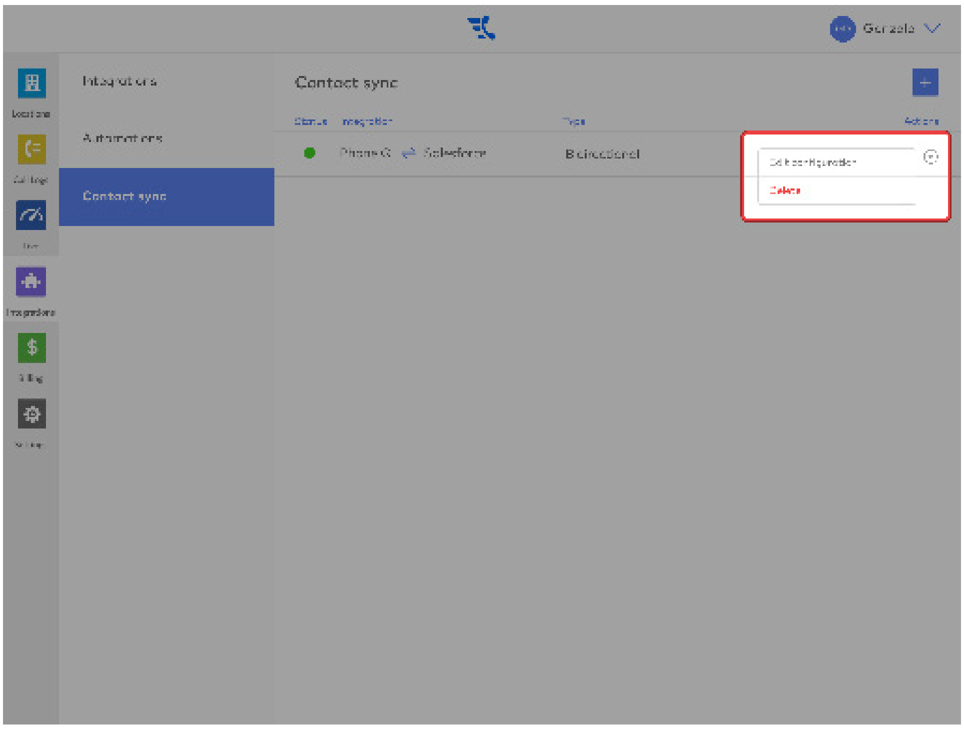
Only sync contact with a valid first name:
Will only sync objects between platforms that have a valid first name.

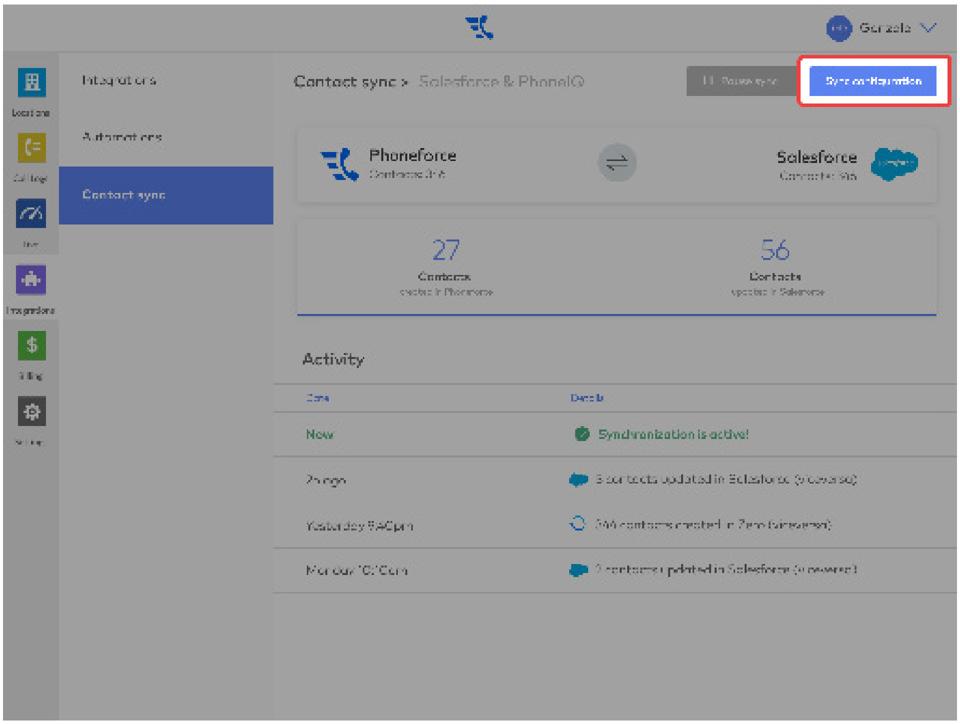
After all contact sync options are selected, click “Sync”. The Initial Sync will start and once finished, access to the contact sync dashboard will be granted. The Initial Sync status is displayed on the Contact Sync view and has different states represented in colors:

Orange: Initial Sync in Progress
Green: Active Sync
Grey: Paused Sync
Red: Sync with Errors

3.2 Edit Contact Sync

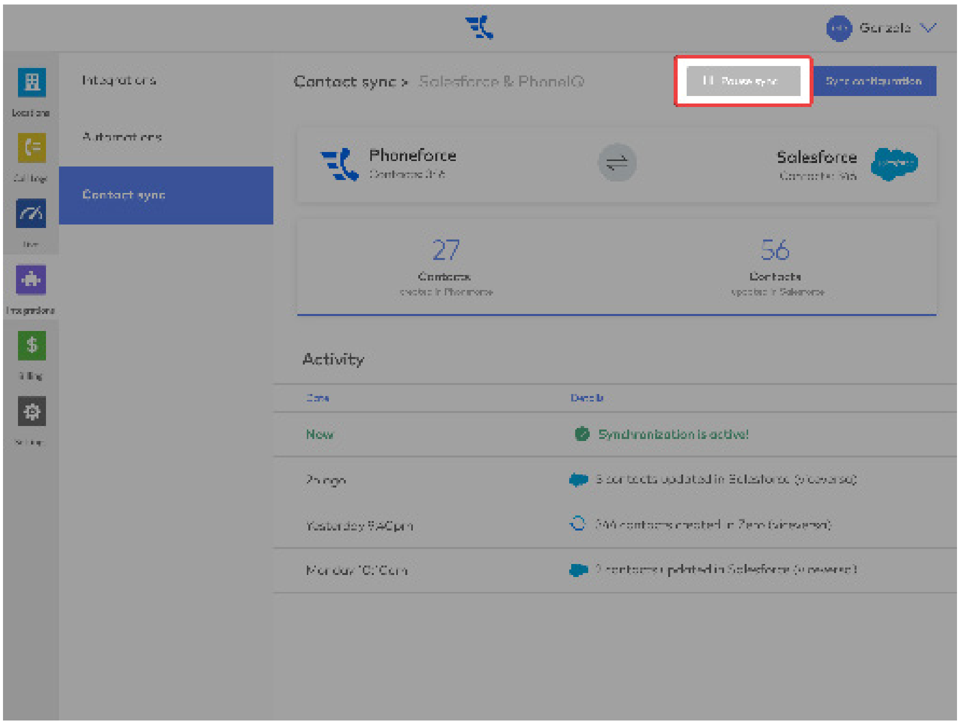
Within the Contact Sync view, hover over the listing and select the “Edit Configuration” option in the dropdown menu on the right hand side. Make the desired configuration changes and click save.





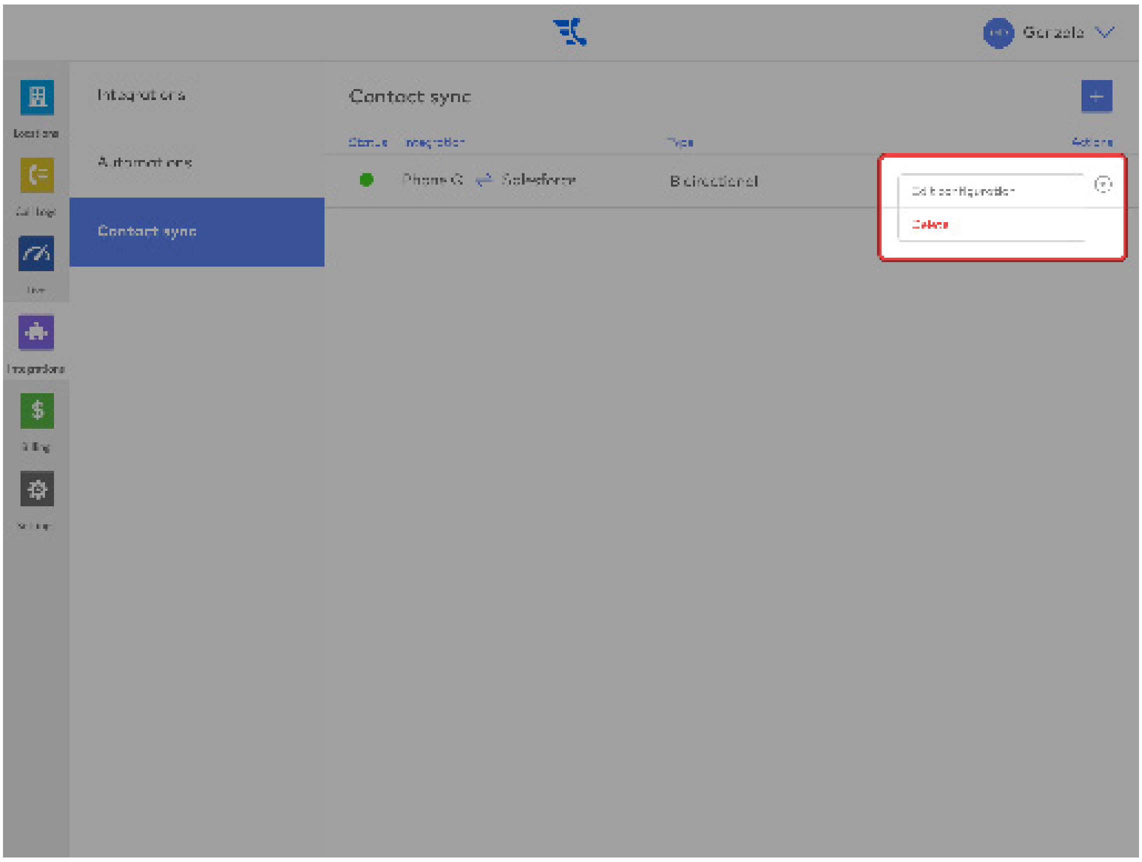
3.3 Pause Contact Sync

Within the Contact Sync view, access the Contact Sync Dashboard by clicking on the desired listing. Click "Pause Sync". To reactivate the Contact Sync, follow the same procedure and click "Resume Sync".



3.4 Delete Contact Sync

Within the Contact Sync view, hover over the listing and select the "Delete" option in the dropdown menu on the right hand side. Objects that have already been synced will be kept on both platforms and won't be deleted.



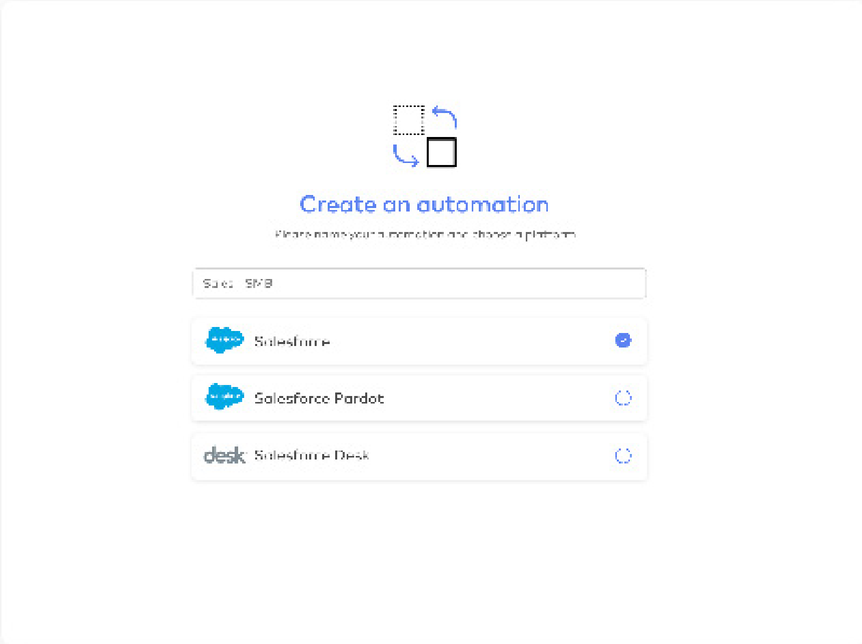
4. Automations

PhoneIQ automation capabilities allow managers to streamline processes and eliminate manual data entry by triggering events in Salesforce based on PhoneIQ events like: Outbound calls, inbound calls, missed calls, voicemails, etc. Automations can perform a wide range of operations with Salesforce like automatic call logging, automatic case creation, automatic task creation and more.

4.1 Setup Workflow Automations

Step 1- Naming

Name your automation and select Salesforce.



Step 2- Criteria

Select the criteria upon which you want to automate workflows. Each automation can only support one type of automation criteria, but can include multiple rules. Administrators can choose between:

Department: Will automate workflows based on events performed by all users of the departments chosen.

Queue: Will automate workflows based on events related to the chosen queues.

Ring Group: Will automate workflows based on events related to the chosen ring groups.

Phone Number: Will automate workflows based on events related to the chosen phone numbers.

User: Will automate workflows based on events related to the chosen users.

NOTE: An event will only trigger one automation at a time. If an event qualifies for multiple automations, the following criteria of automation selection will be applied based on the automation criteria weight (the criteria with highest weight will be selected).

Automation Criteria Weight:

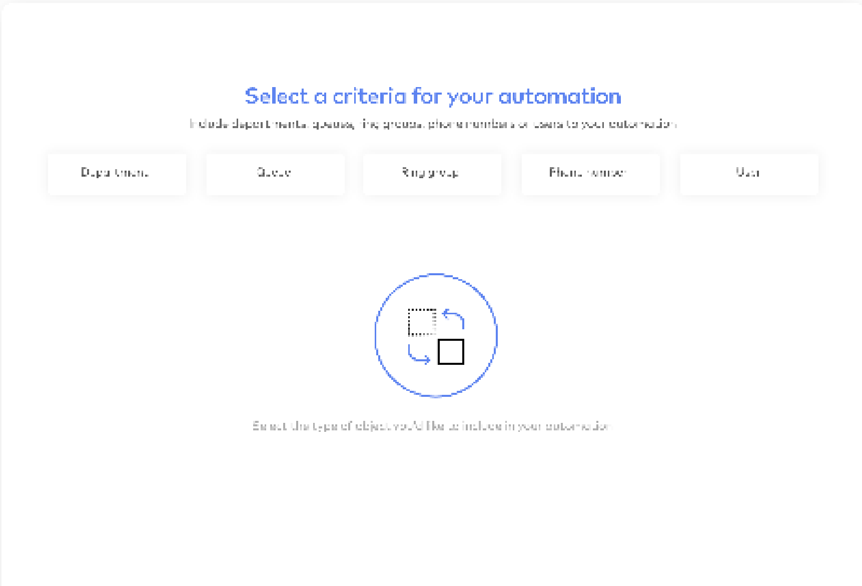
User Level - 5

Department - 4

Queue - 3

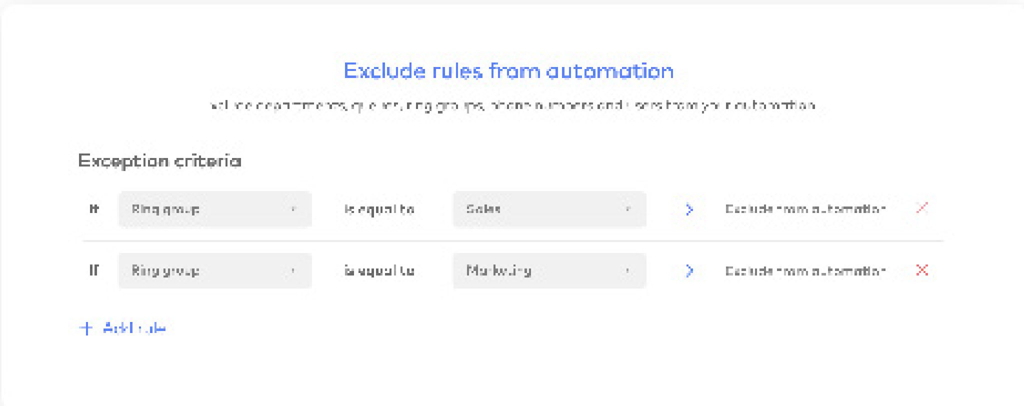
Ring Group - 2

Phone Number - 1



Step 3- Exceptions

Exceptions allow administrators to exclude certain departments, users, phone numbers, queues and ring groups from the automation settings. Multiple exception criteria can be selected for one automation, and events that fall within the chosen categories won’t trigger workflow automations.



Step 4- Automations

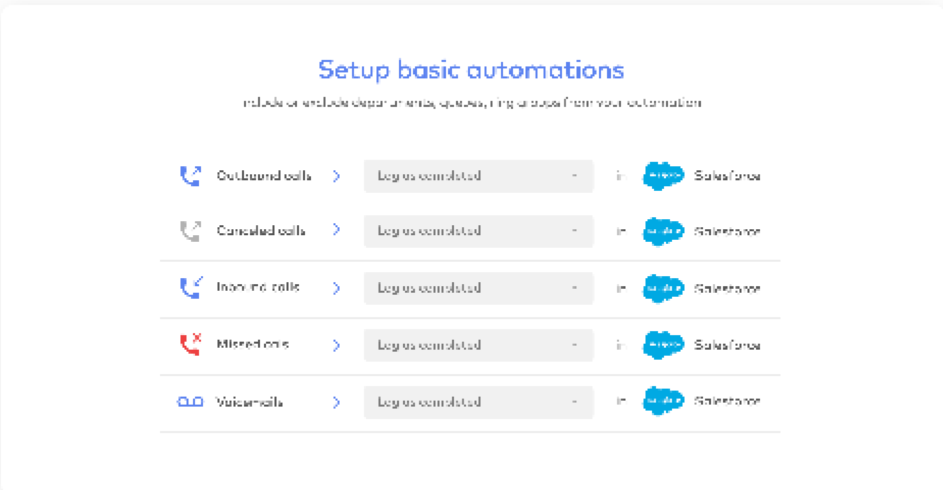
Choose what type of workflow automations you want to trigger based on the different events.

Event type:

Outbound Call: Outbound calls to the PSTN that establish a connection with the other party.
Canceled Call: Outbound calls to the PSTN that are canceled before establishing a connection with the other party.
Inbound Call: Inbound calls from the PSTN to a PhoneIQ number that are answered by a user or IVR.
Missed Call: Inbound calls from the PSTN to a PhoneIQ number that are are routed to a user but not answered.
Voicemail: Inbound calls from the PSTN to a PhoneIQ number that are sent to a Voicemail box.
Call Enqueued: Inbound calls from the PSTN that are enqueued and waiting to be handled by an agent.

Workflow automations:
Log as completed: Logs the event in Salesforce as a Task and marks it as completed.
Log as in progress: Logs the event in Salesforce as a Task and marks it as in progress.
Create & Assign to New Case as completed: Creates a New Case in Salesforce with Status New and logs the event in Salesforce as a Task related to the case and marks it as completed.
Create & Assign to New Case as in progress: Creates a New Case in Salesforce with Status New and logs the event in Salesforce as a Task related to the case and marks it as in progress.
Do Nothing: No workflow automations are triggered in Salesforce.

Step 5- Automation Settings



The default object used to log the call: If multiple records share the same phone numbers, select against which object should the call be logged (Contact or Lead).

Send recording url to 3rd party apps: When enabled, the call recording URL will be shared and displayed using the Call Recording custom field within Salesforce tasks.

If caller is not a contact, lead or account then create a: If the caller is not identified by caller ID, PhoneIQ can create a new contact or lead object with the caller ID as first name in order to preserve information.

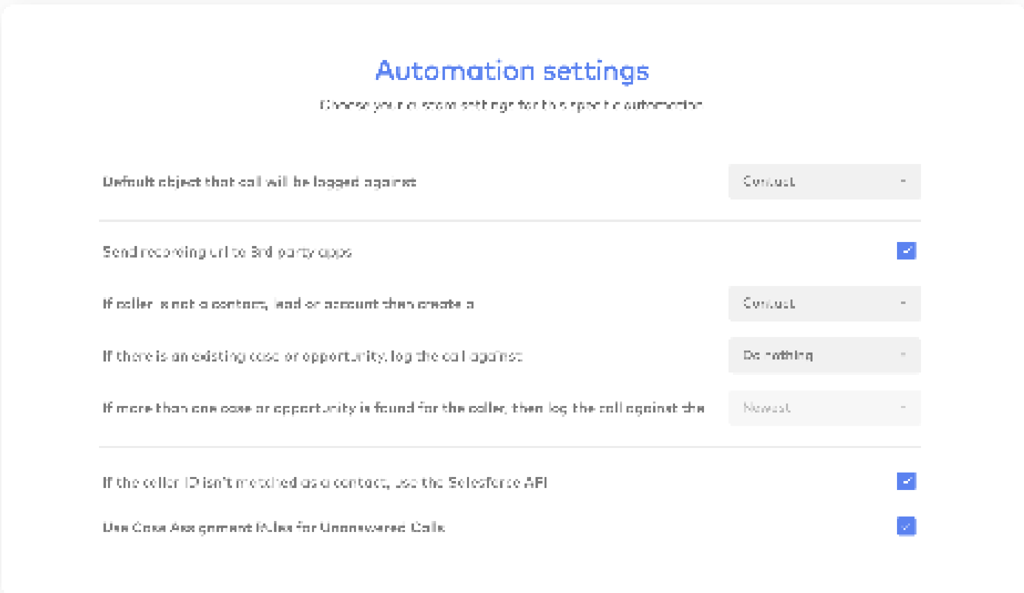
If there is an existing case or opportunity, log the call against: When enabled, if an existing open case or opportunity are found, the call will be logged as a Salesforce Task related to the object in question.

If more than one case or opportunity is found for the caller, then log the call against the: If multiple open cases or opportunities are found for the caller, PhoneIQ can log the call against the Newest or Oldest record.

If contact sync is not active, or if the caller isn't matched as a contact in PhoneIQ then search the Phone Number using the Salesforce API: When enabled, if no match is found in PhoneIQ, we will query Salesforce and search objects based on the phone number in order to log events. This will consume at least an extra API call.

4.2 Pause Automation

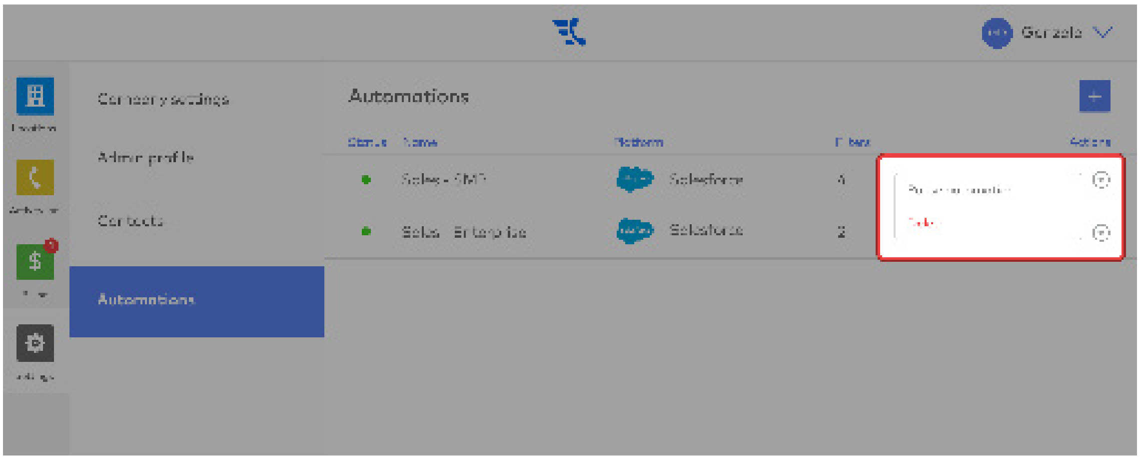
Within the Automations view, hover over the listing and select the "Pause" option in the



dropdown menu on the right hand side. To reactivate the Automation, follow the same procedure and click “Resume”.

4.3 Delete Automation

Within the Automations view, hover over the listing and select the “Delete” option in the dropdown menu on the right hand side.

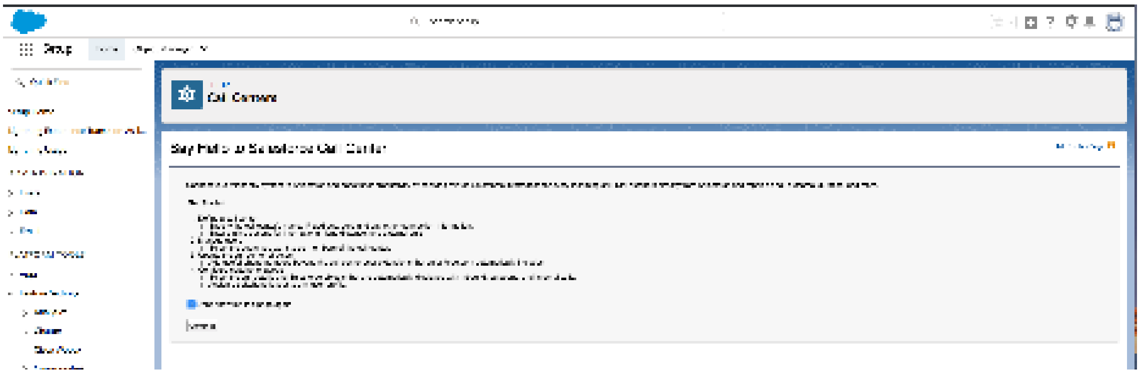


5. Softphone Setup

5.1 Salesforce Call Center Setup

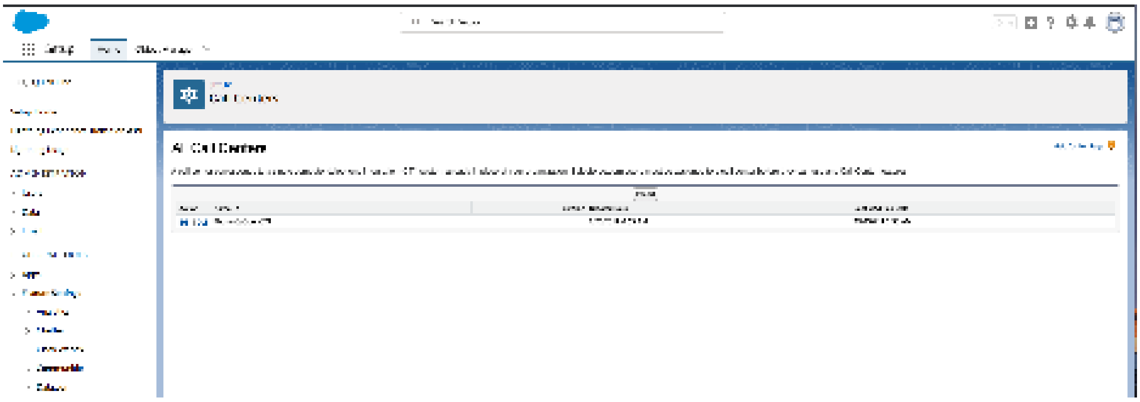
Step 1-

Navigate to the Setup Page in Salesforce.



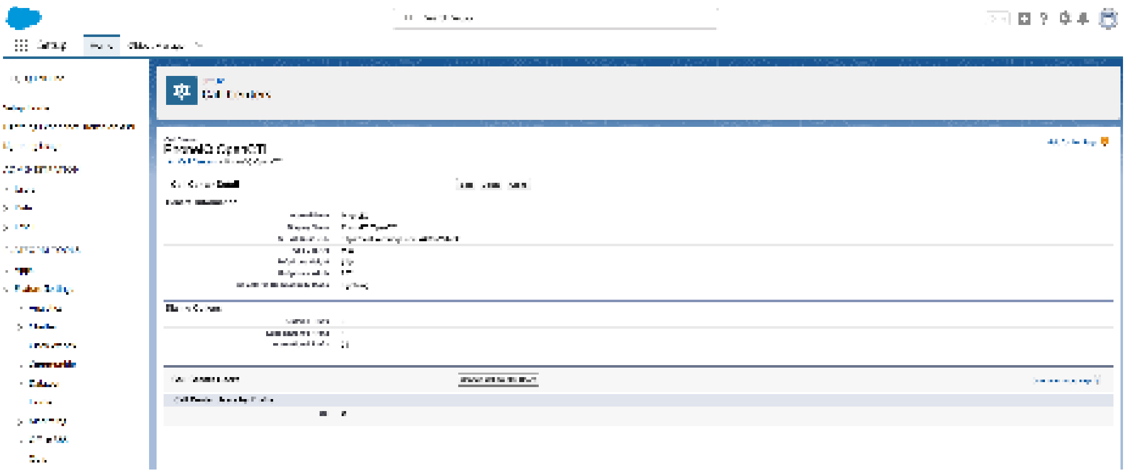
Step 2 -

Type “Call Centers” in the Quick Find Box and select the “Call Centers” Option.



Step 3 -

Select edit on the “PhoneIQ Open CTI” option.



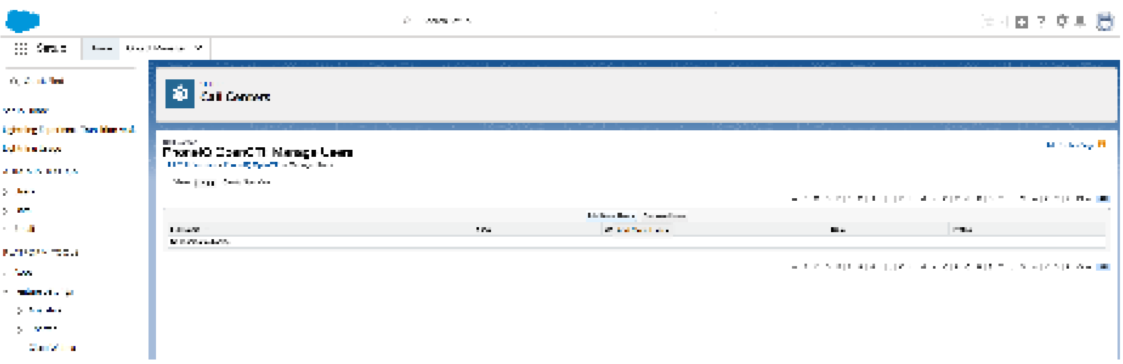
Step 4 -

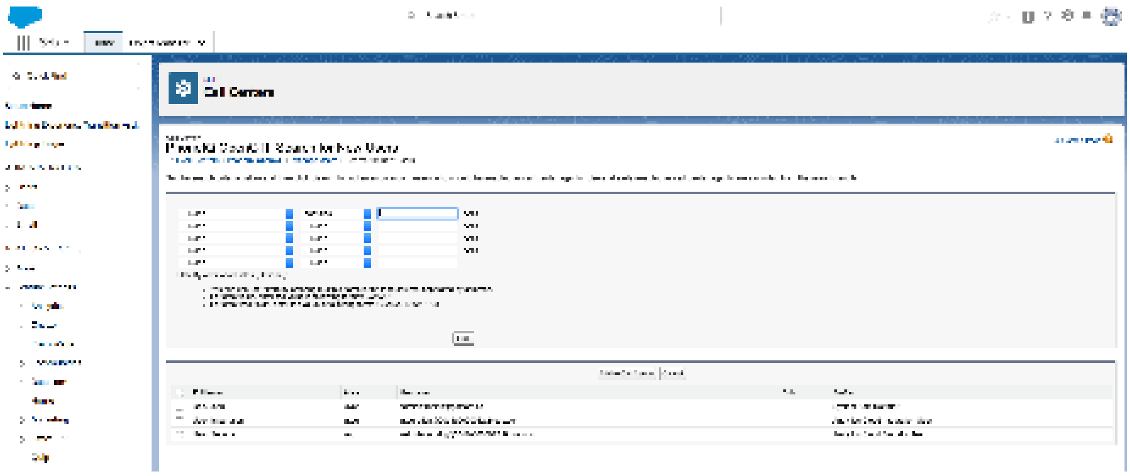
1) Click “Manage Call Center Users”

2) Select the option “Add More Users”

3) Select the search criteria and click “Find”

4) Check the desired users and click “Add to Call Center”



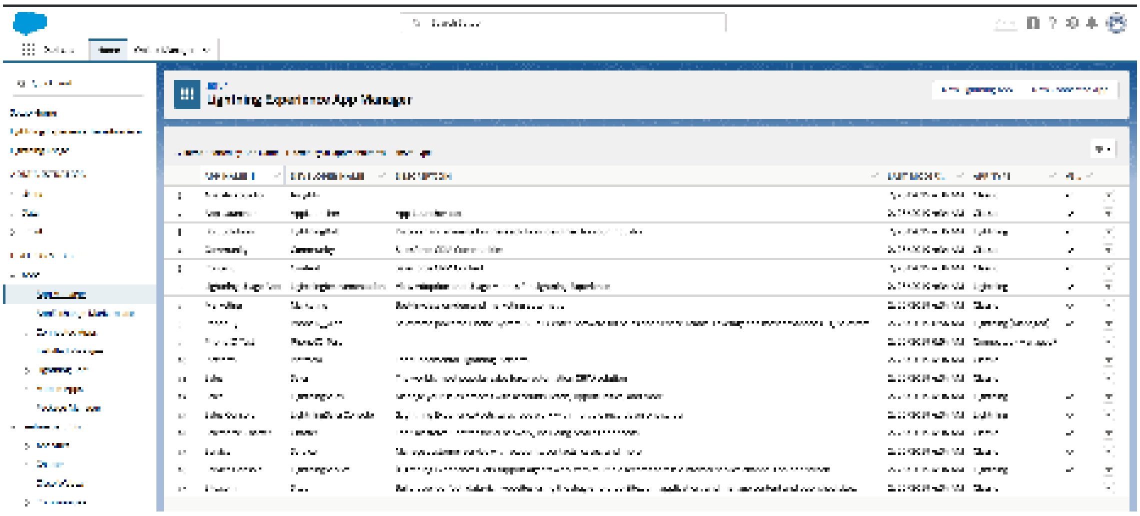


5.2 Enable the Softphone to Salesforce Users:

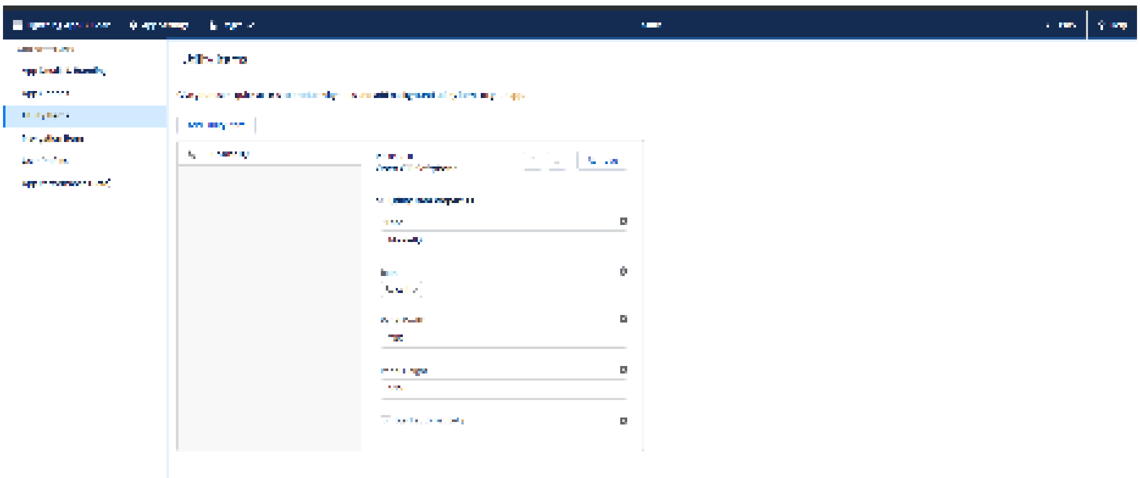
Step 1 -

Navigate to the Setup Page in Salesforce.

Step 2 -



Type “App Manager” in the Quick Find Box and select the “App Manager” option.



Step 3 -

Select one of the apps in which you want the softphone enabled for your users, click on the right hand side drop down menu and select "Edit".

Step 4 -

1) Navigate to the "Utility Bar" view
2) Click "Add Utility Item"
3) Complete the fields in the Utility Items properties form as shown in the following image and click Save.

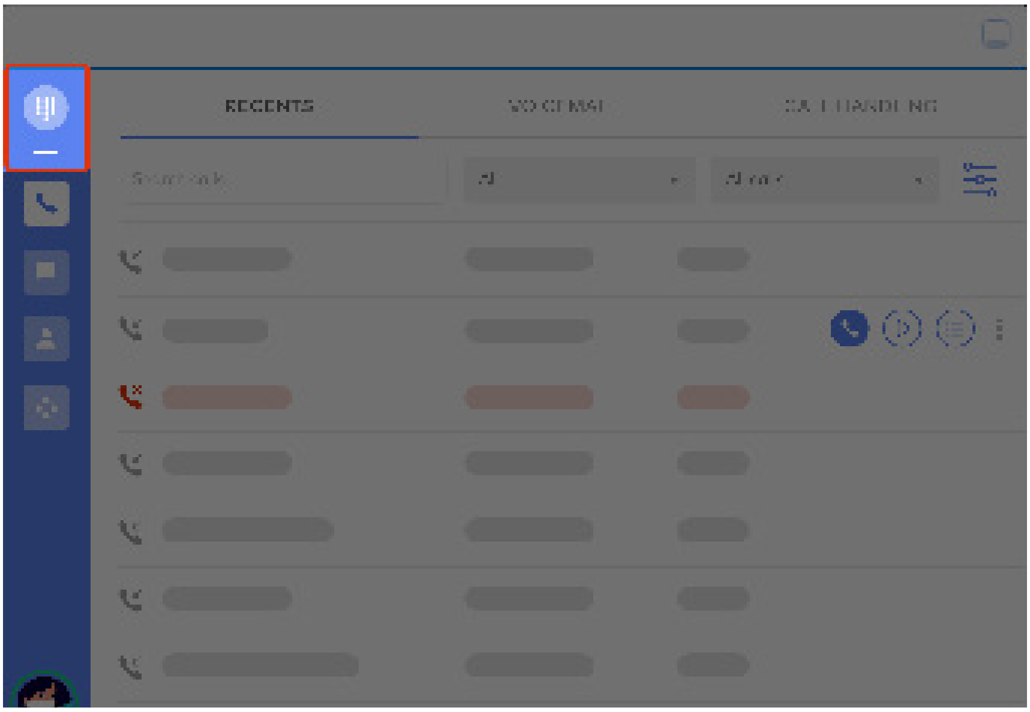
NOTE: Only users that have been assigned to the "PhoneIQ OpenCTI" Salesforce Call Center, will be able to view the PhoneIQ Softphone on their Utility Bar (only on the apps where the softphone has been enabled following the procedure in 5.2).

6. Softphone Features

6.1 Dialer

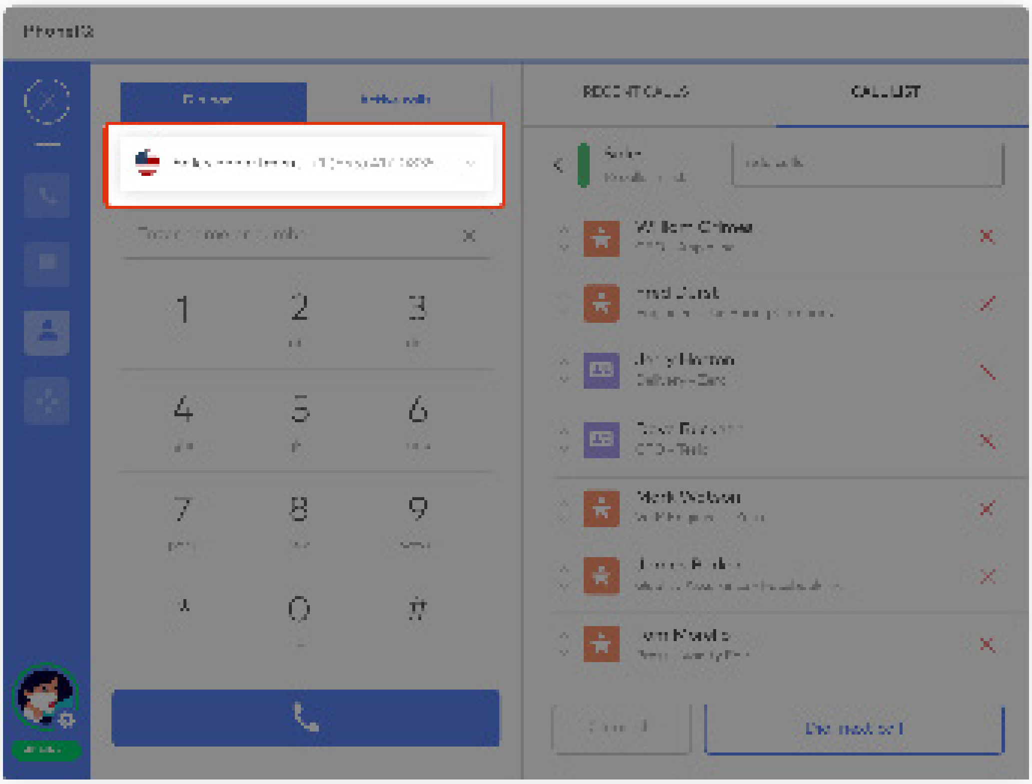
6.1.1 Dialer

Once the Softphone is correctly setup, users will be able to view it in the Salesforce Utility Bar. To access the dialer, open the softphone and click on the "Dialpad" icon on the top left corner.



6.1.2 Caller ID

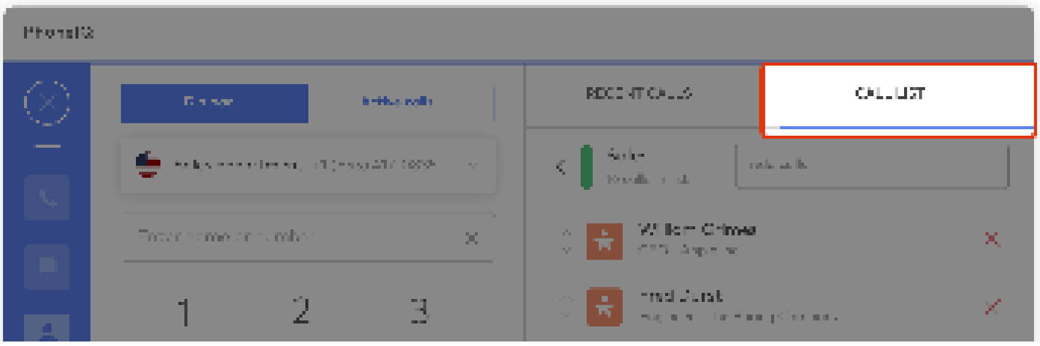
Agents can manually change their caller ID using the Caller ID drop down menu. If local presence is enabled for the agent, then the system will automatically choose the best number to present to the callee based on the available phone numbers in the account.



6.1.3 Call Lists

Agents can create call lists to automate the outbound dialing process. From within the Dialer and "Call Lists" view select "Add new call list". Once selected proceed to add a name and select a color. Once done, contacts/leads/accounts can be added either manually by typing their name or automatically into the call list using the "import from Salesforce View" option.

6.1.4 Click to dial

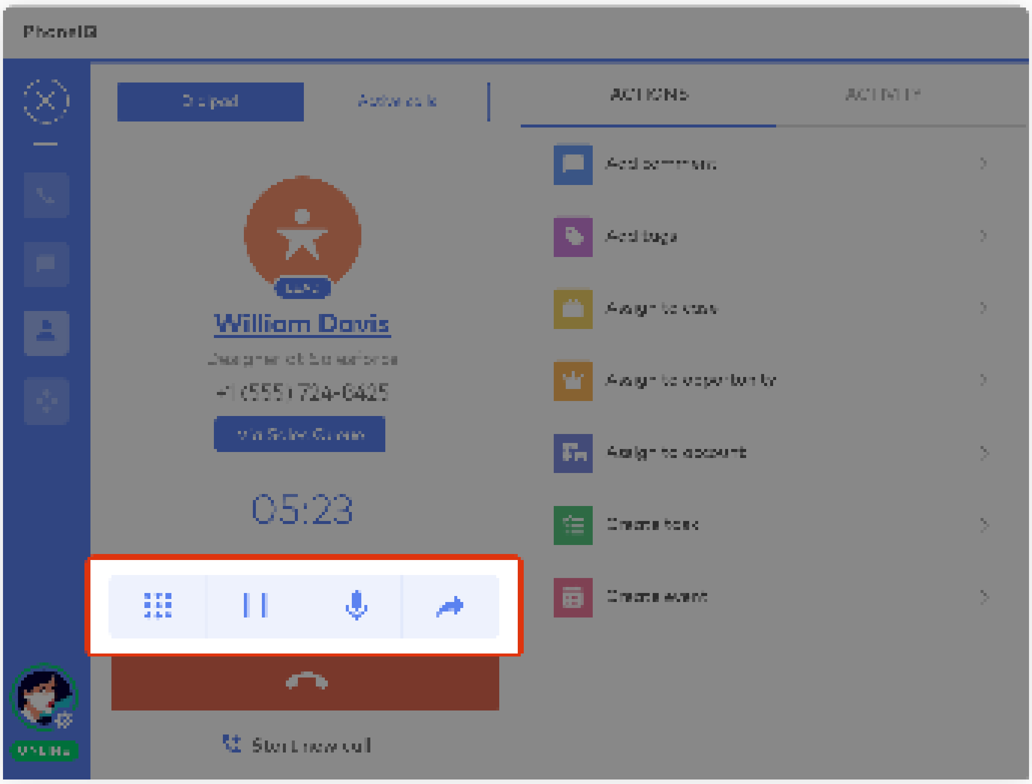


Click to dial allows agents to automatically dial a number via the softphone by clicking the desired number within the Salesforce Lightning user interface.

6.1.5 In Call Controls

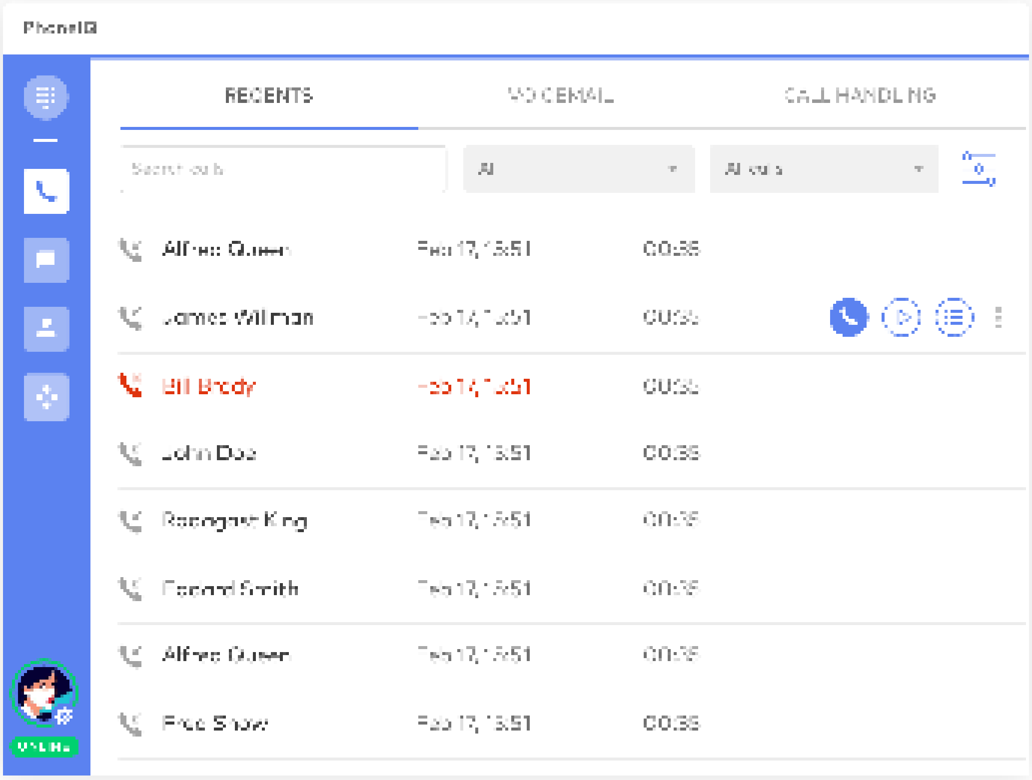
In call controls allow agents to manage the different states of a phone call, like: mute, hold, warm transfer, cold transfer and transfer to voicemail.

6.2 Phone App



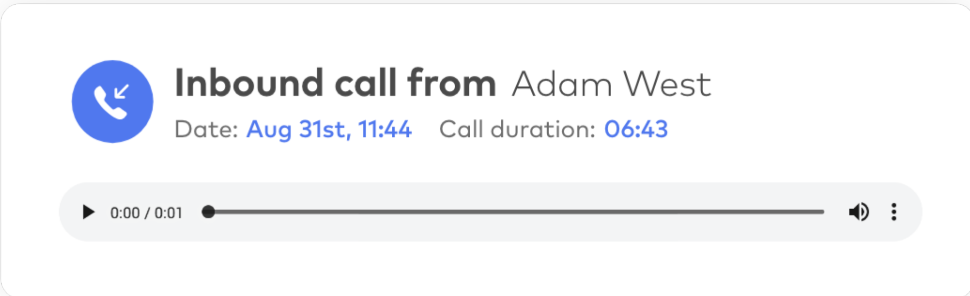
6.2.1 Recents

The recent view allows agent to quickly visualize all their call activity with detailed CDR (Call Detail Record) information like: Contact name or number, via (PhoneIQ number through which the call connected), Date, Duration, Call Recording and After Call Work data. Search and filter functionality provides further insight into call activity based on call result, PhoneIQ number or Queue.



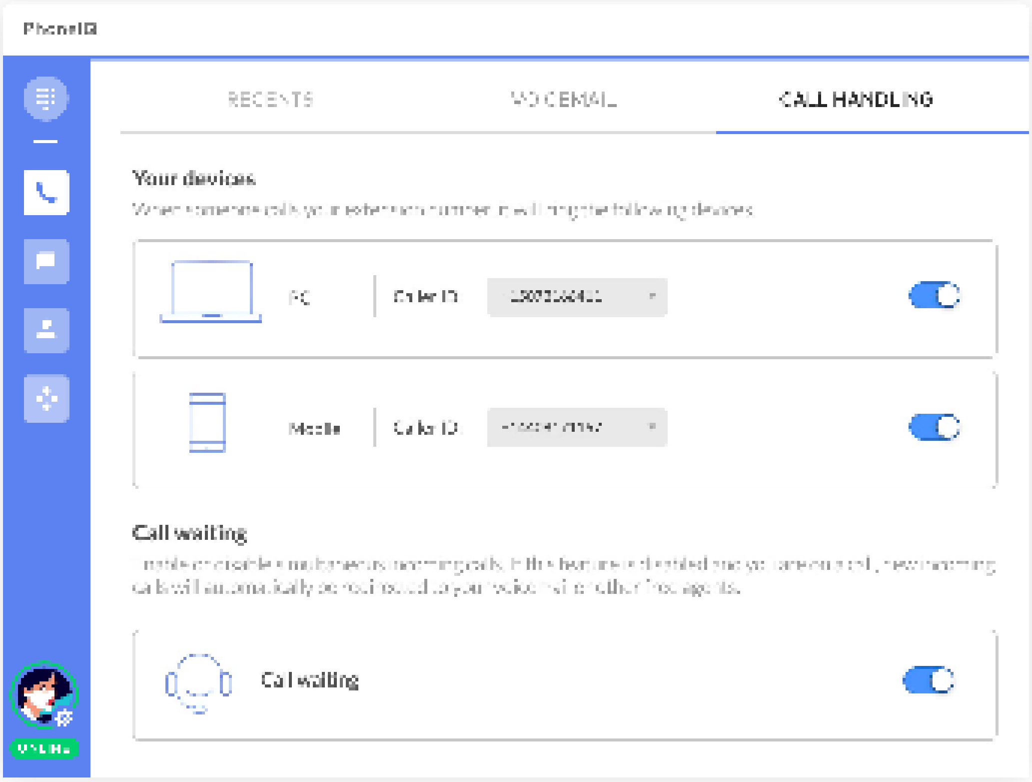
6.2.2 Voicemail

Using the voicemail view users can easily listen in to their voice messages by clicking on the “play ’’ button. Users can also download the audio file by clicking on the 3 dotted menu and selecting the “download” option. PhoneIQ offers visual voicemail, voicemail to email and voicemail access from every device for simple voicemail retrieval.



6.2.3 Call Handling

From the call handling view, agents can manage different aspects of their communications.



6.2.3.1 Device management

Device management offers two core functionalities: Caller ID selection for each device, and the ability to enable or disable specific devices for phone calls. Once a device is disabled it can no longer perform inbound/outbound calls.

6.2.3.2 Call Waiting

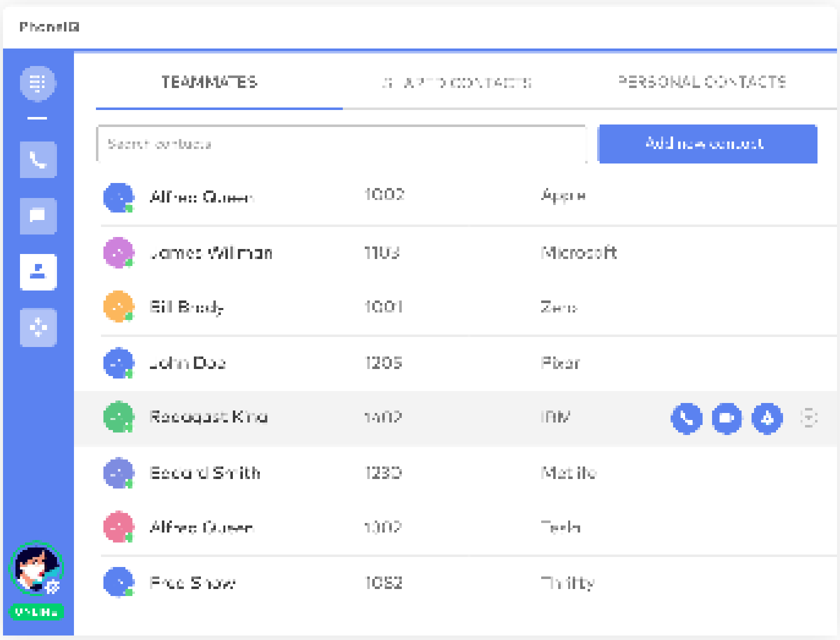
Call waiting is a telephony feature that allows an agent to receive a notification of an inbound call while he is connected to another phone call, providing the opportunity to answer the new call and hold the current one, answer the new call and end the current call or reject the new incoming call. If this feature is disabled calls directed at agents that are on an active phone call will be automatically rejected by the system.

6.2.3.3 Screen pop

Screen pop for Salesforce is a feature that when enabled, if the incoming number matches the number associated to a Salesforce contact or lead, it will automatically navigate to the corresponding Salesforce page in order to provide the agent with further context about the caller.

6.2.3.4 Local Presence

Local presence allows agents to automatically present the best caller ID to callee's based on the area code they are dialing and the phone numbers associated with their account increasing connection rates by presenting a familiar phone number format. Local presence is currently only available in the US & Canada and must be activated by the PhoneIQ administrator from the admin portal at an account level: Settings > Company Settings > Local Presence; and at a user level from the Users view.



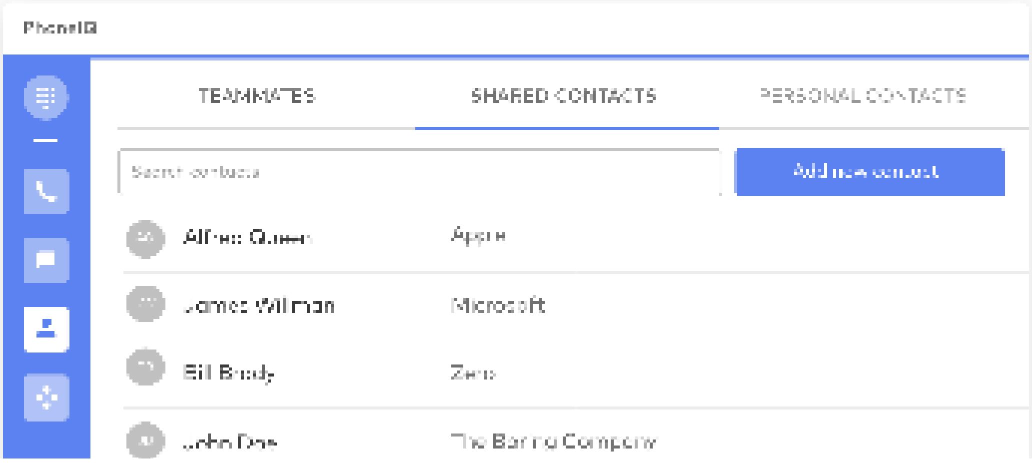
6.3 Contacts App

6.3.1 Team Directory

From the team directory view, agents can quickly find co workers, their extension number and view to which department they have been assigned.

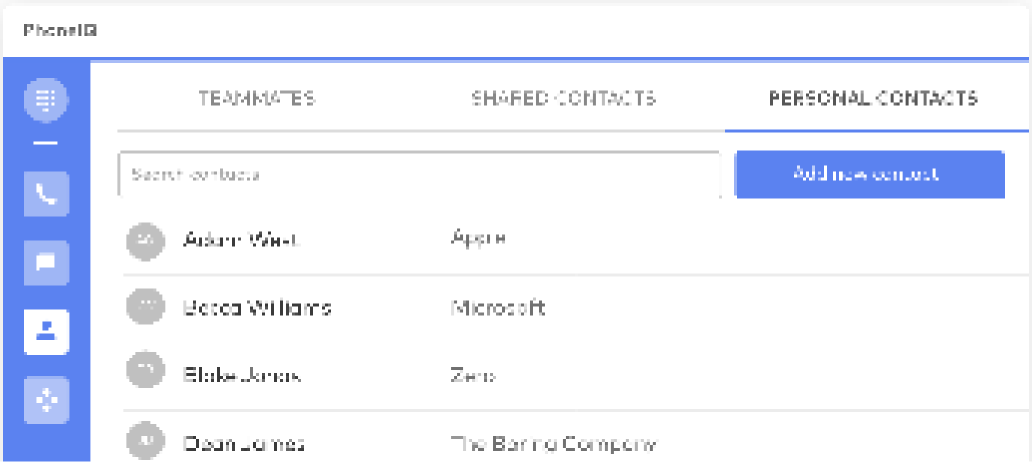
6.3.2 Shared Contacts

The Shared Contact List works as central repository of contacts for the account. Contacts assigned to this list will be accessible to all users across their different devices. Contacts synced using the Salesforce integration will be located within this list.



6.3.3 Personal Contacts

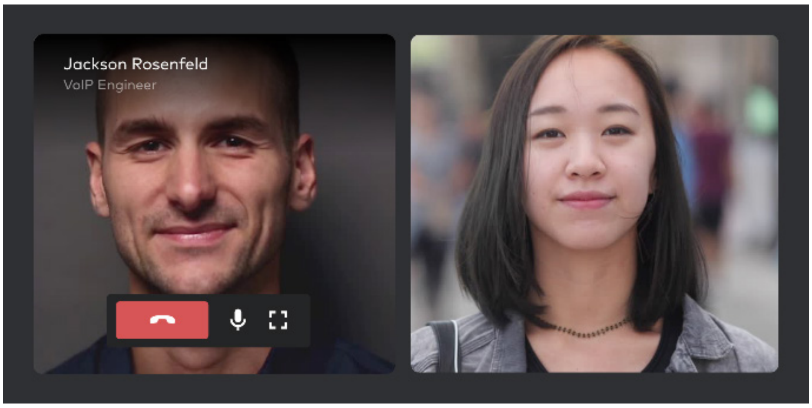
The Personal Contact List allows agents to create a private list of contacts that only they can view and access across their different devices.



6.4 Meetings App

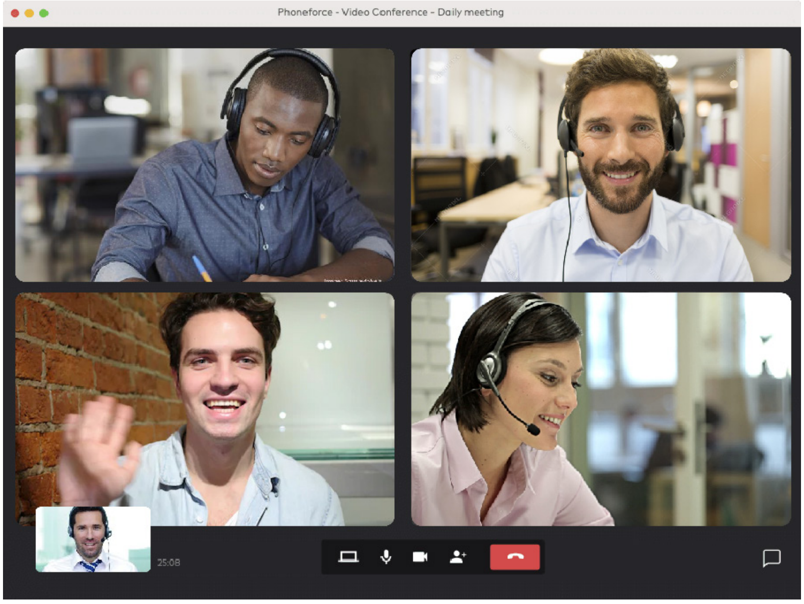
6.4.1 Voice Meetings

Voice meetings allow agents to host cloud based voice conference calls that can be accessed via multiple devices like: the Chrome web browser (using the meeting url), the meeting room extension number, dedicated phone numbers (if they were assigned to the meeting room) and the desktop app for PhoneIQ users. Every Voice Meeting has a 4 digit PIN code that must be entered to access the conference call. Hosts can either connect from their PC or Dial in through the extension number or phone number assigned to the meeting room. Hosts are provided advanced controls to invite, kick and mute participants. Instant messaging is provided to allow participants to chat during the conference call. Conference calls can also be scheduled for future times, leveraging the G Suite integration to book meetings directly in Google Calendar while providing the access information automatically to participants.
Maximum number of participants: 40



6.4.2 Video Meetings

Video meetings allow agents to host cloud based video meetings that can be accessed via multiple devices like: the Chrome web browser and the desktop app for PhoneIQ users. Every Video Meeting has a 4 digit PIN code that must be entered to access the online meeting. Hosts are provided advanced controls to invite, kick and mute participants. Instant messaging is provided to allow participants to chat during the online meeting. Hosts can also schedule meetings for future times, leveraging the G Suite integration to book meetings directly in Google Calendar while providing access information automatically to participants.
Maximum number of participants: 6



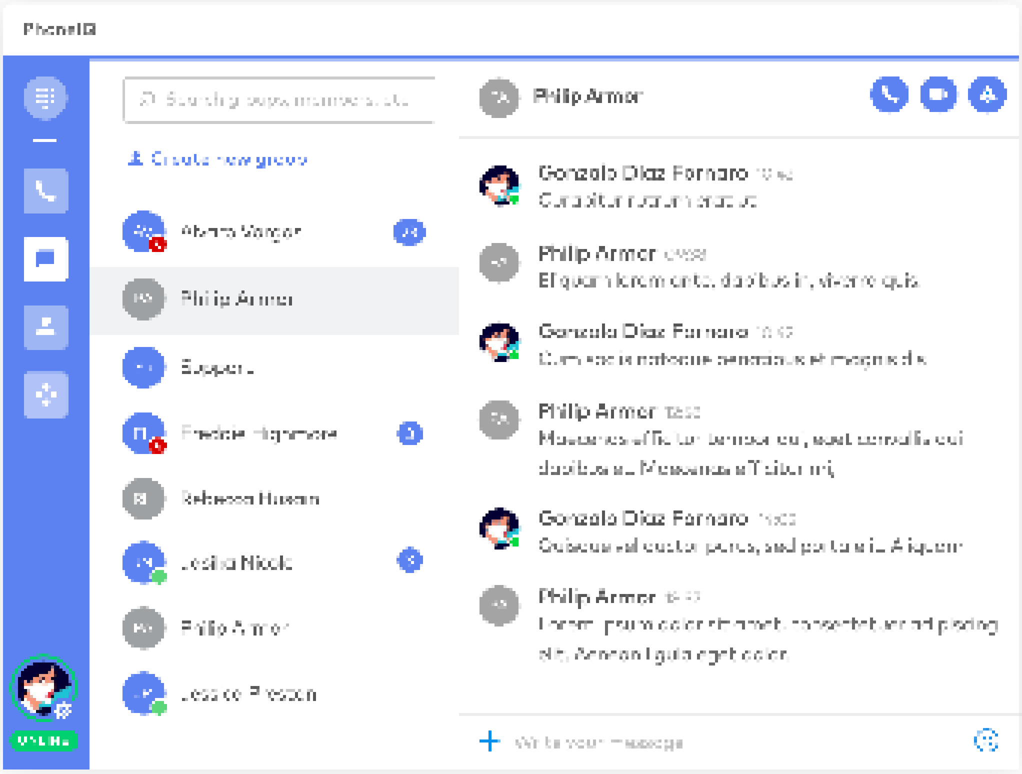
6.5 Messaging App

6.5.1 Private Messaging

Agents can connect via one on one messaging to share valuable information with each other or supervisors to accelerate sales and service performance. Agents can text, share files and visualize online presence instantly using the Messaging App.

6.5.2 Group Messaging

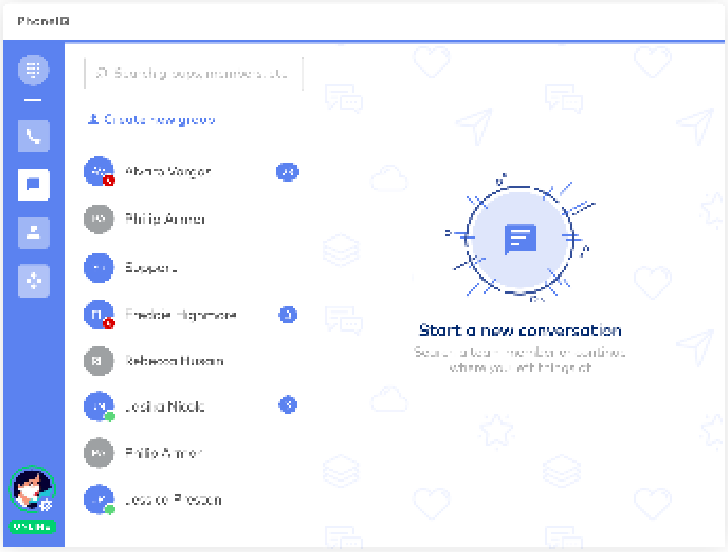
Agents can connect via group messaging to share valuable information with multiple peo-



ple at once. Using group messaging agents can quickly text and share files to a group of coworkers. To create new groups agents must click on the "Create new group" button situated below the search bar on the top left corner. Groups must have a name and at least two members.

6.6 Settings

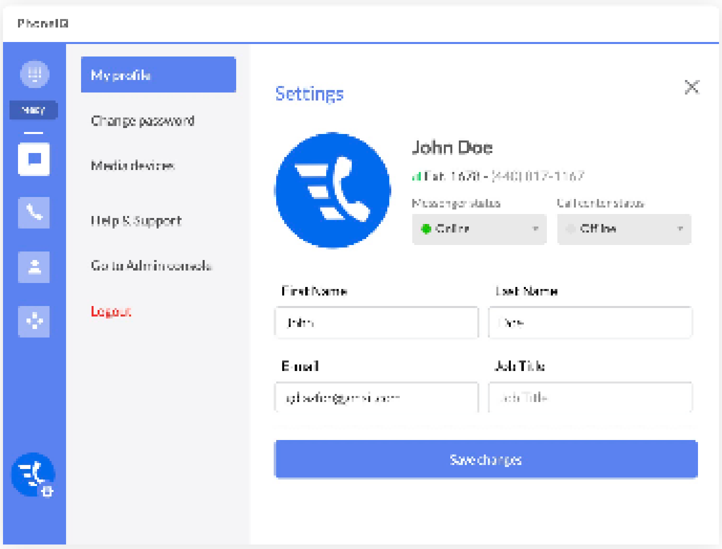
6.6.1 My profile

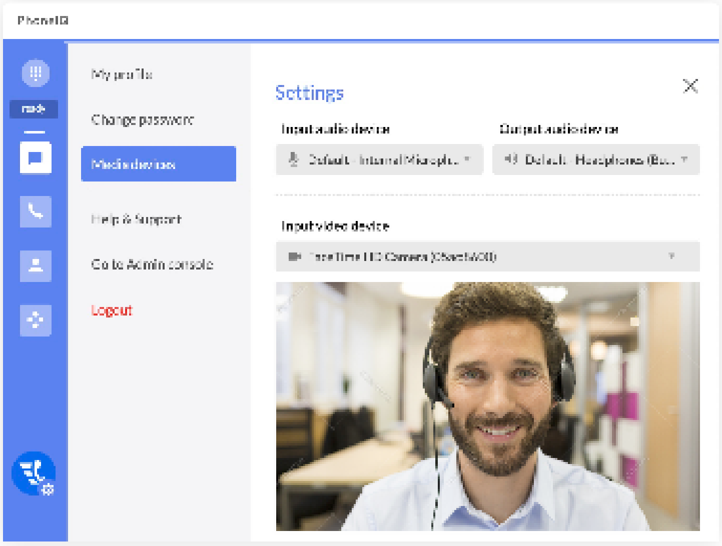


The profile view allows the agent to check and change basic information about themselves like First and Last Name, Email, Job Title, etc. Agents can also change their messenger status for instant messaging and their call center status for inbound call queues.

6.6.2 Media Devices

The media devices view allows agents to manage their input audio device, output audio device and input video device settings.



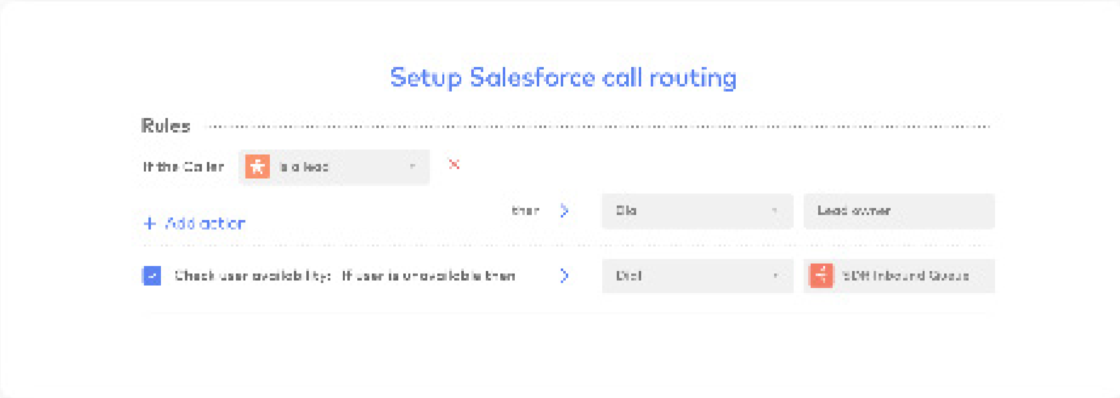


7. Salesforce Smart Routing

Smart routing blends powerful IVR technology with Salesforce to route callers to the best agent based on Salesforce data like Contact, Lead, Account, Case or Opportunity owners. Imagine being able to connect callers automatically to the agent that is managing their case instead of routing them to the standard support queue. Smart routing reduces average handle time, boosting call center productivity while delivering an unmatched customer experience.

7.1 Smart Routing Conditions

To enable smart routing, a PhoneIQ admin must drag and drop the corresponding applet into the call flow and click edit. The admin will be able to add one or multiple conditions by clicking the option "Add new condition". The condition is first composed by the caller ID check, PhoneIQ will try to match the incoming caller ID to an existing: Contact, Lead or Account based on the option selected and if a match is found, the call will be routed to the Salesforce object owner. By enabling the agent availability option, PhoneIQ can check if the agent is available before routing the call, and if he is currently unavailable the admin can select an alternative routing option.



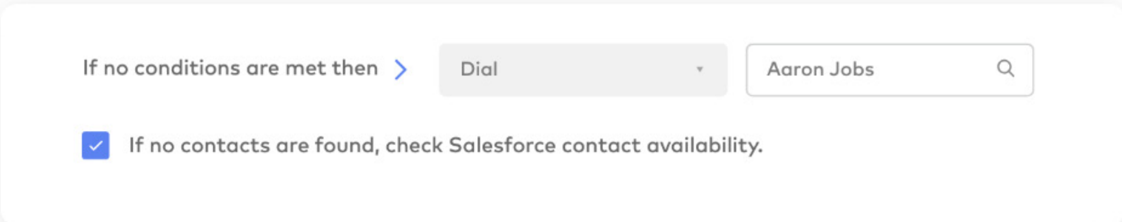
7.2 No Match Condition

If the caller doesn't match any of the conditions established, admins can add a no match condition that can:

Dial: Route the call to another endpoint (call flow, queue, ring group or user).

Play: Play an audio file.

Hangup: End the call.

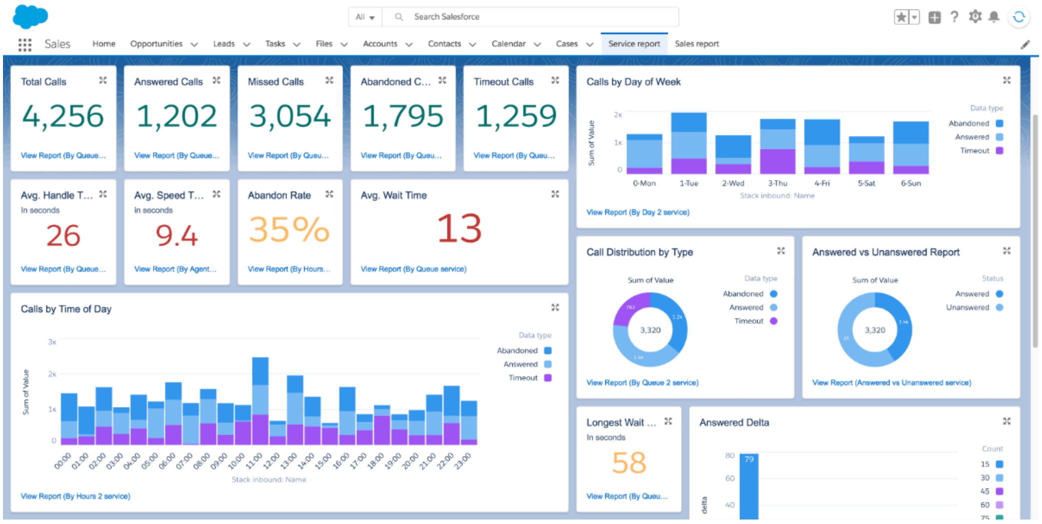


8. Dashboards & Reporting

Smart routing blends powerful IVR technology with Salesforce to route callers to the best agent based on Salesforce data like Contact, Lead, Account, Case or Opportunity owners. Imagine being able to connect callers automatically to the agent that is managing their case instead of routing them to the standard support queue. Smart routing reduces average handle time, boosting call center productivity while delivering an unmatched customer experience.

8.1 Queue Report & Dashboard

The Queue report provides management with a full view of all call queue related activity for the last 30 days within Salesforce via native Dashboards. By default, this dashboard will show the sum of all activity across all the account's queues. Salesforce admins can add custom filters, enabling management to view this report filtered by specific queues by following the instructions specified in the item 7.5.



8.1.1 Total Calls

Total calls is the total amount of inbound phone calls received by call queues in the account, represented as the sum of Answered and Missed calls.

8.1.2 Answered Calls

Answered calls is the total amount of inbound phone calls received by call queues in the account with call status equal to answered.

8.1.3 Missed Calls

Missed calls is the total amount of missed phone calls related to call queues in the account, represented as the sum of Abandoned and Timeout calls.

8.1.4 Abandoned Calls

Abandoned calls are phone calls that enter a call queue and in which the caller forcefully hangups before the maximum waiting time of a queue is reached.

8.1.5 Timeout Calls

Timeout calls are phone calls that enter a call queue and that is missed because the maximum waiting time of a queue is reached.

8.1.6 Service Level

Service level is a call center KPI that establishes what percentage of calls are being answered within a specific target timeframe. For instance, a call center supervisor might want to answer 85% of calls within the first 20 seconds of a call entering the queue. Managers can set up their desired timeframe via the admin portal > locations > ring groups & call queues > call queues and selecting the specific queue > advanced > service level.

8.1.7 Average Handle Time

Average Handle Time is a call center metric that estimates the average duration of one transaction, measured from the caller's initiation of the call. It includes talk time and after call work activities.

8.1.8 Average Wait Time

Average Wait Time is a call center metric that estimates the average waiting time experienced by callers before being connected to an agent for the first time.

8.1.9 Longest Wait Time

Longest Wait Time is a call center metric that estimates the longest waiting time experienced by a caller before he is connected to an agent for the first time.

8.1.10 Abandon Rate

Abandon rate is missed calls expressed as a percentage of total calls.

8.1.11 Calls by Day of Week

Calls by day of week provides an instant view into the total number of calls received by call queues separated by specific days of the week. The total number of calls is the sum of answered (handled) and missed calls (abandoned & timeout).

8.1.12 Calls by Time of Day

Calls by time of day provides an instant view into the total number of calls received by call queues during specific hours of the day. This report lets managers know which are the busiest hours and helps them staff appropriately. The total number of calls is the sum of answered (handled) and missed calls (abandoned & timeout).

8.1.13 Call Distribution by Type

The Call distribution by type report allows managers to easily compare the different volume based on call type within their call center: handled, abandoned and timeout.

8.1.14 Answered vs. Unanswered Report

The Answered vs. Unanswered report allows managers to easily compare the total of answered and unanswered phone calls.

8.1.15 Answered Delta

The Answered delta report shows the aggregation of answered calls as the caller waiting time increases. For example on an answered delta report of 100 calls, 40 calls might have been answered during the first 10 seconds of waiting time, 80 calls on the first 20 seconds and all answered calls within the first 30 seconds.

8.1.16 Unanswered Delta

The Unanswered delta report shows the aggregation of unanswered calls as the caller waiting time increases. For example on an unanswered delta report of 100 calls, 10 calls might have been missed during the first 10 seconds of waiting time, 20 calls on the first 20 seconds and all calls unanswered calls within the first 30 seconds.

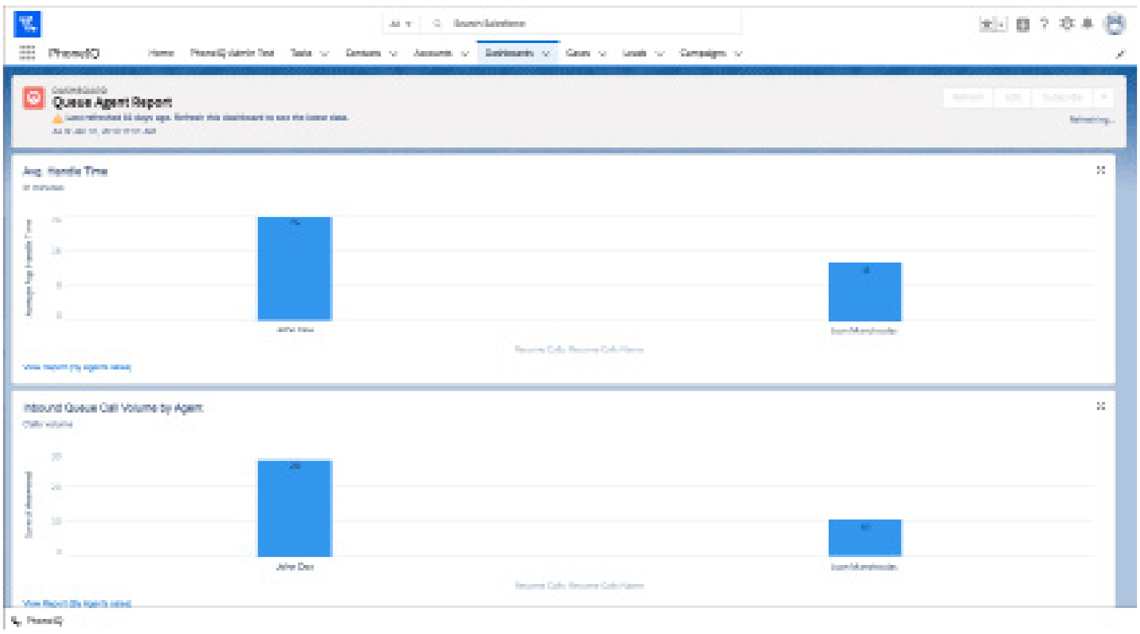
8.1.17 Call Volume by Queue

The Call volume by queue report allows managers to easily compare the total call volume generated by their different call queues. The total call volume is represented as the sum of all: handled, abandoned and timeout calls.

8.2 Queue Agent Report & Dashboard

The Queue agent report provides management with a full view of all agent queue related activity for the last 30 days within Salesforce via native Dashboards.

8.2.1 Average Handle Time



Average Handle Time by agent is a call center metric that estimates the average duration of one transaction per agent, measured from the caller's initiation of the call. It includes talk time and after call work activities.

8.2.2 Inbound Queue Call Volume

Inbound Queue Call Volume by agent is the total amount of answered calls by agent.

8.2.3 Total Inbound Talk Time

Total Inbound Talk Time is the sum of all the inbound related talk time by an agent expressed in minutes.

8.2.4 Total Outbound Talk Time

Total Outbound Talk Time is the sum of all the outbound related talk time by an agent expressed in minutes.

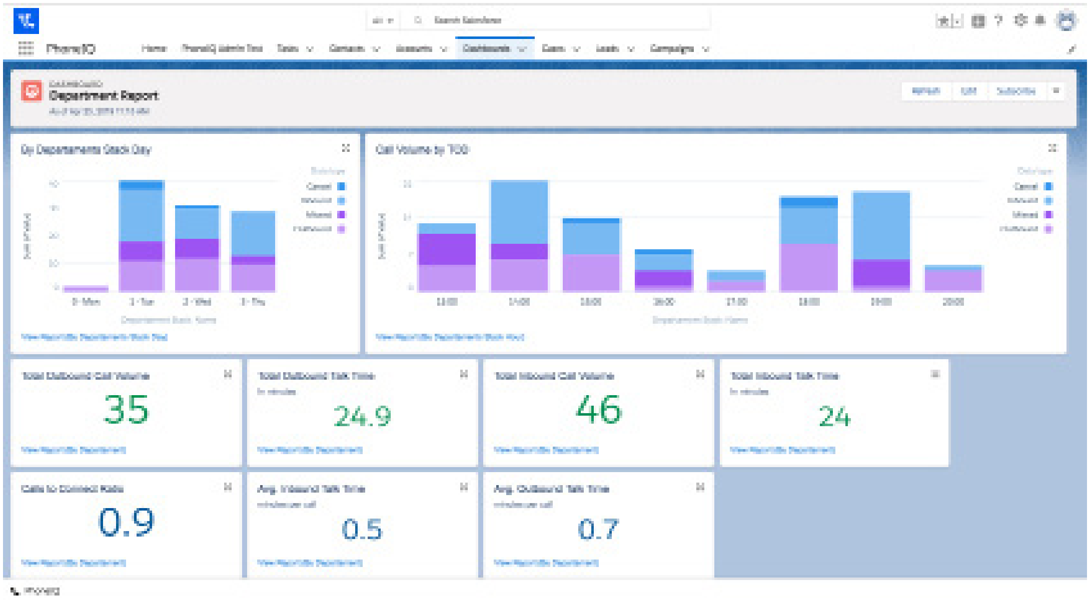
8.2.5 Missed Queue Call Volume

Missed Queue Call Volume is the amount of missed calls related to queues by an agent.

8.3 Department Report & Dashboard

The Department report provides management with a full view of all department related activity for the last 30 days within Salesforce via native Dashboards. By default, this dashboard will show the sum of all activity across all the account's departments. Salesforce admins can add custom filters, enabling management to view this report filtered by specific departments by following the instructions specified in the item 7.5.

8.3.1 Call Volume by Day of Week



Calls volume by day of week provides an instant view into the total number of calls received by departments separated by specific days of the week. The total number of calls is the sum of all outbound, inbound, canceled and missed calls.

8.3.2 Call Volume by Time of Day

Calls by time of day provides an instant view into the total number of calls received by departments during specific hours of the day. This report lets managers know which are the busiest hours and helps them staff appropriately. The total number of calls is the sum of all outbound, inbound, canceled and missed calls.

8.3.3 Total Outbound Call Volume

Total Outbound Call Volume is the total number of outbound calls performed by members of departments that connected with the caller.

8.3.4 Total Outbound Talk Time

Total Outbound Talk Time is the sum of the duration of all outbound calls performed by members of departments.

8.3.5 Total Inbound Call Volume

Total Inbound Call Volume is the total number of inbound calls received by members of departments.

8.3.6 Total Inbound Talk Time

Total Inbound Talk Time is the sum of the duration of all inbound calls performed by members of departments.

8.3.7 Avg. Inbound Talk Time

Avg. Inbound Talk Time is the average duration of all inbound calls performed by members of departments.

8.3.8 Avg. Outbound Talk Time

Avg. Outbound Talk Time is the average duration of all outbound calls performed by members of departments.

8.3.9 Calls to Connect Ratio

Calls to connect ratio is the ratio of connected calls to canceled calls, expressed as a value from 0 to 1. This metric helps supervisors quickly gauge how effective reps are at connecting with prospects or customers.

8.3.10 Outbound vs. Inbound Talk Time

This report provides insight into how much time reps are spending handling inbound calls vs outbound calls.

8.3.11 Outbound vs. Inbound Call Volume

The Outbound vs. Inbound Call Volume report provides a detailed comparison between the total number of inbound calls vs. outbound calls.

8.3.12 Pitch Success

This report provides managers with a high level overview of how outbound calls are performing by agent. By default, a call that was less than 30 seconds long is considered unsuccessful, a call that was 30-90 seconds long is considered partially successful and a call with a duration greater than 90+ seconds is considered successful.

8.3.13 Call Purpose

Call purpose is a report generated based on After Call Work data once a call is finalized and the form is completed by the agent who must select one of the options provided for his/her department.

8.3.14 Disposition Codes

Disposition Codes is a report generated based on After Call Work data once a call is finalized and the form is completed by the agent who must select one of the options provided for his/her department.

8.3.15 Customer Mood

Customer Mood is a report generated based on After Call Work data once a call is finalized and the form is completed by the agent who must select one of the options provided for his/her department.

8.3.16 Tags

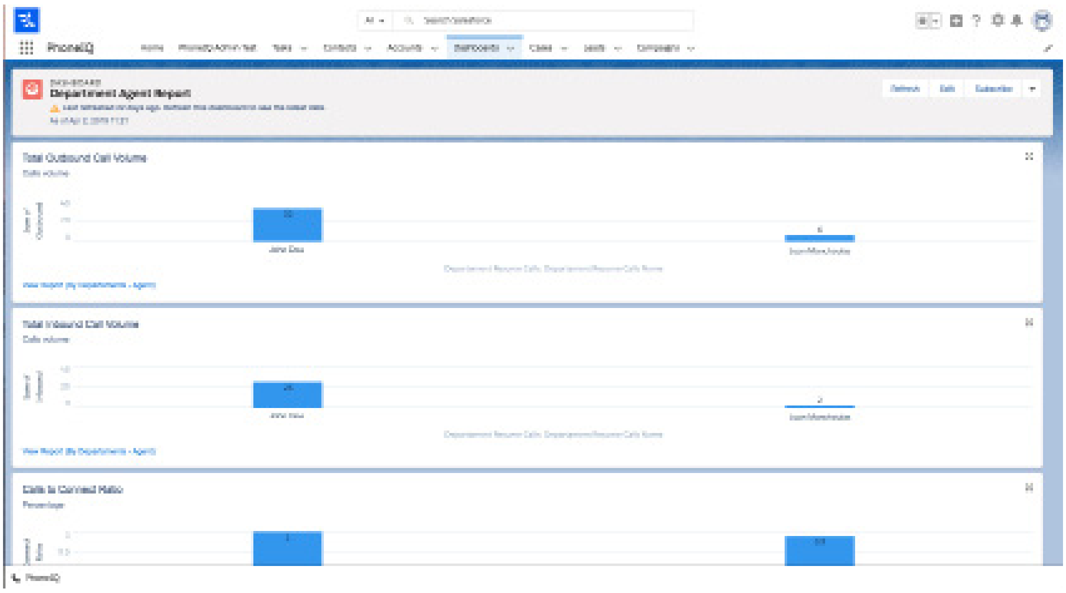
Tags allow agents to easily tag phone call records based on specific criteria defined by management. The Tags report shows the total amount of tags assigned to calls and divided by specific tag.

8.4 Department Agent Report & Dashboard

The Department agent report provides management with a full view of all agent related activity for the last 30 days within Salesforce via native Dashboards.

8.4.1 Total Outbound Call Volume

Total Outbound Call Volume is the total number of outbound calls performed by an agent that connected with the caller.



8.4.2 Total Inbound Call Volume

Total Inbound Call Volume is the total number of inbound calls received and answered by an agent.

8.4.3 Calls to Connect Ratio

Calls to connect ratio is the ratio of connected calls to canceled calls by an agent, expressed as a value from 0 to 1. This metric helps supervisors quickly gauge how effective reps are at connecting with prospects or customers.

8.4.4 Total Outbound Talk Time

Total Outbound Talk Time is the sum of the duration of all outbound calls performed by an agent.

8.4.5 Total Inbound Talk Time

Total Inbound Talk Time is the sum of the duration of all inbound calls received and answered by an agent.

8.4.6 Avg. Outbound Talk Time

Avg. Outbound Talk Time is the average duration of all outbound calls performed by an agent that connected with the caller.

8.4.7 Avg. Inbound Talk Time

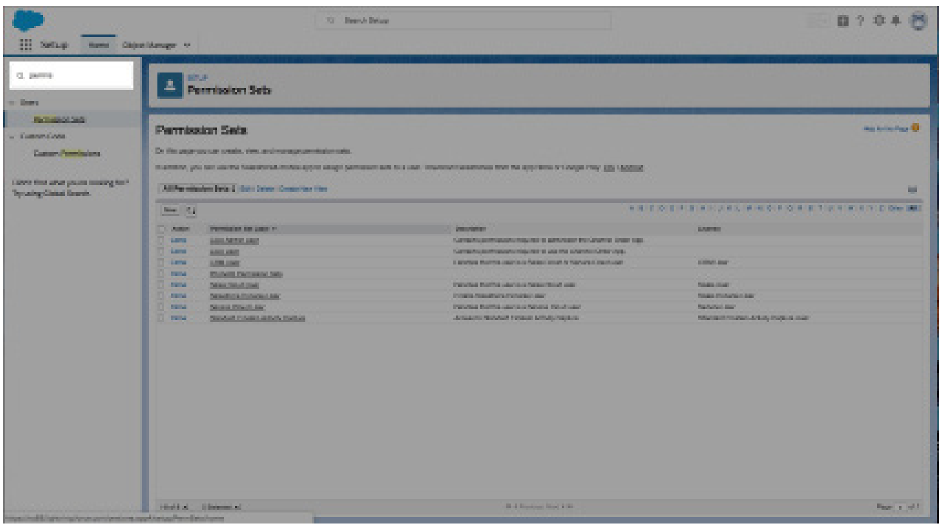
Avg. Inbound Talk Time is the average duration of all inbound calls received and answered by an agent.

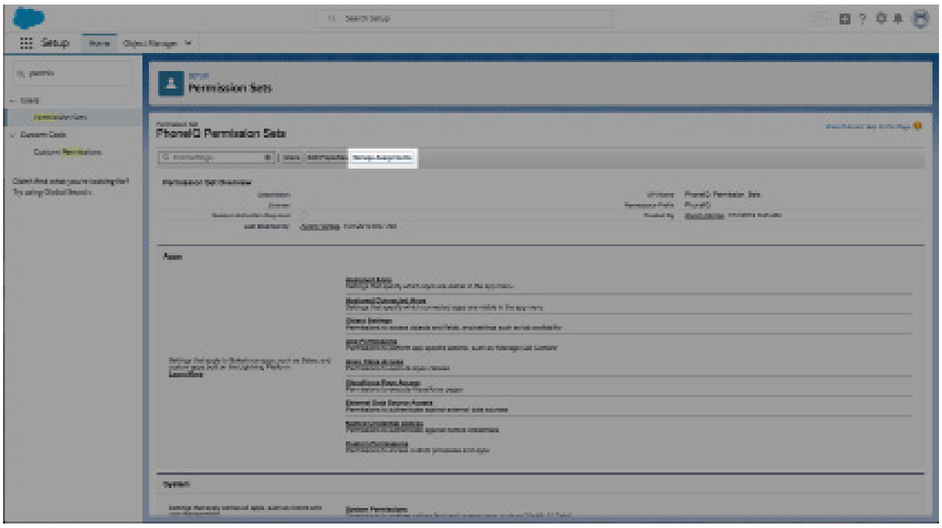
9. Salesforce Permission Sets

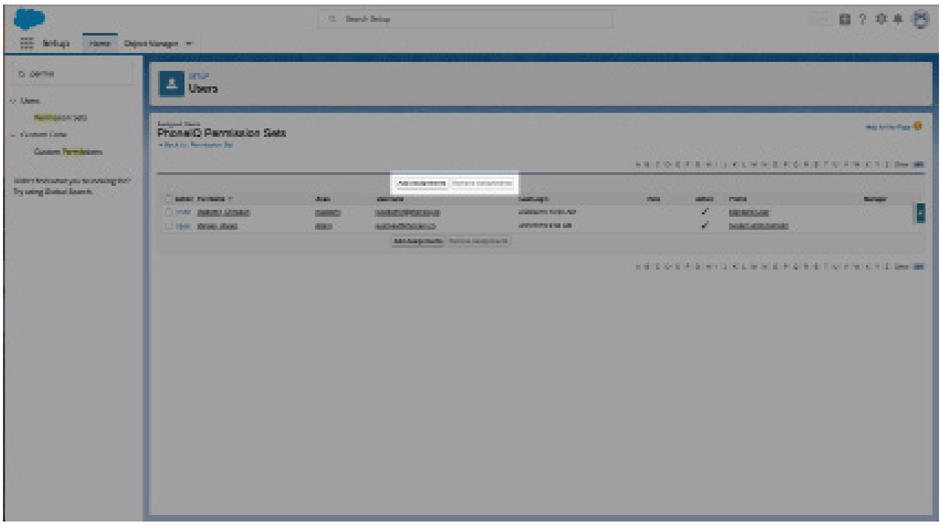
A permission set is a collection of settings and permissions that give users access to various tools and functions, basically providing extended functional access to users without changing their Salesforce profile. When installed, the PhoneIQ managed package automatically installs its own Permission Sets that will allow users to view custom fields within the task layout like: call recording, disposition codes, tags, call purpose, etc., and view tabs like the PhoneIQ Admin tab within the PhoneIQ Lightning App.

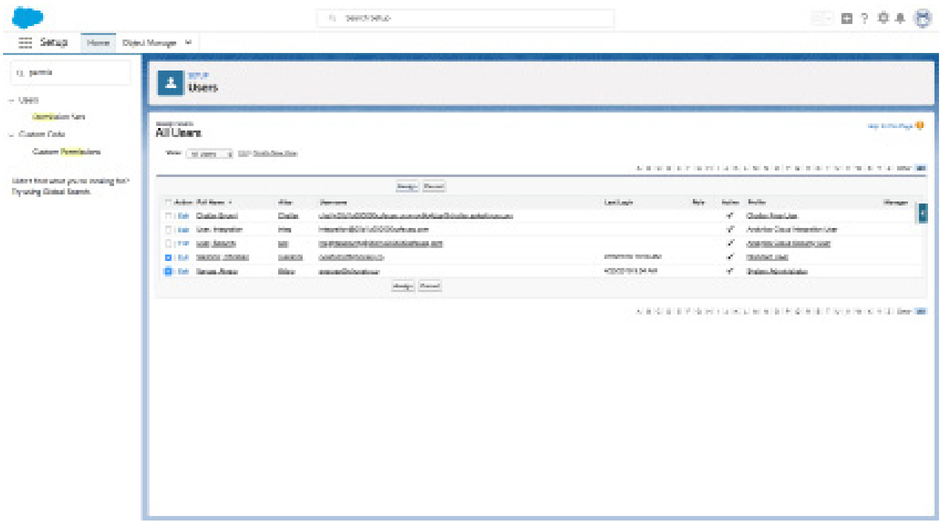
9.1 Managing Permission Sets

To manage permission sets assignment navigate to Setup within Salesforce, type "Permission Sets" in the Quick Box search and click on Permission Sets. Once inside, click on the PhoneIQ permission sets and click Manage Assignments. From within this view you can either Add Assignments or Remove Assignments.




Setup
Permission Sets
PhoneIQ Permission Sets


Setup
Users
PhoneIQ Permission Sets

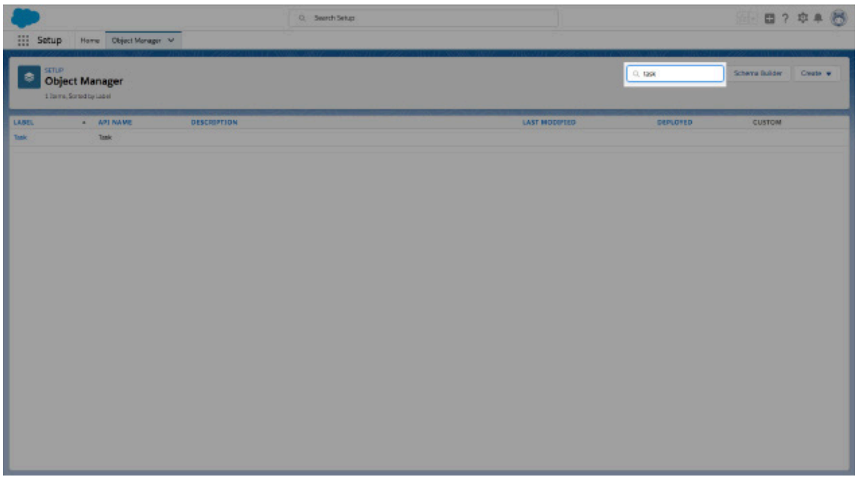

Setup
Users
All Users

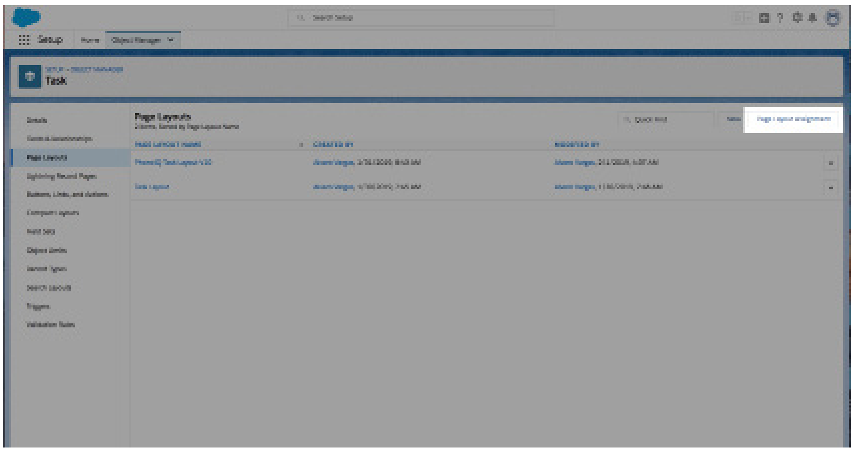
10. Task Layouts

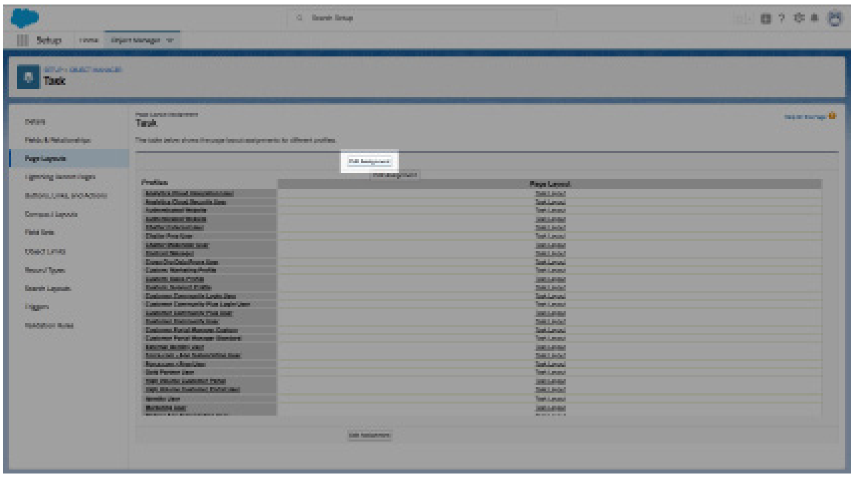
A task layout is a collection of data fields and inputs that compose the structure and layout of a task within the Salesforce CRM. Tasks are used within Salesforce to store telephony related activities and interactions. The PhoneIQ managed package provides a Task Layout that automatically provides Salesforce users with visibility into PhoneIQ custom fields like: call recording, disposition codes, tags, customer mood, call purpose, etc.

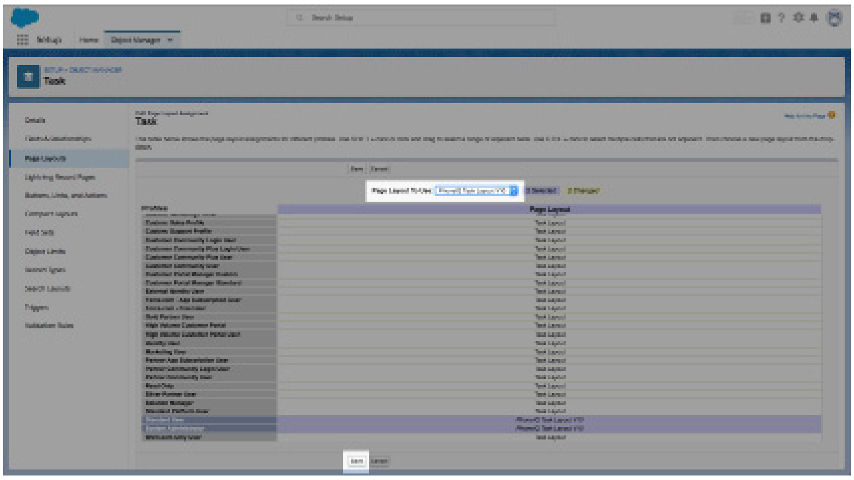
10.1 Managing & Assigning Task Layouts

To manage Task Layouts navigate to Setup within Salesforce, type "Object Manager" in the Quick Box search and click on Object Manager. In the Quick Find box type "Task", navigate to the Task view and click "Page Layouts". Once inside click "Page Layout Assignment" > Edit Assignment, select the profiles to which you want to assign the PhoneIQ Layout by clicking on the list below and select the PhoneIQ Task Layout V10 as the "Page layout To Use" and hit save. Once completed navigate to a task created by PhoneIQ's automation layer and if the permissions sets and layout are correctly assigned, the user will be able to view the additional protected custom fields.









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