



PureConnect for Salesforce

Printed Help

PureConnect powered by Customer Interaction Center® (CIC)

2018 R5

Last updated November 13, 2018

Abstract

This document is a printable version of the PureConnect for Salesforce Help.

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PureConnect for Salesforce

PureConnect for Salesforce

The PureConnect for Salesforce integration is a version of the CIC client with an abbreviated feature set. PureConnect for Salesforce provides advanced CIC call controls inside the third-party customer relationship management (CRM) system Salesforce. There is nothing to install on each user's computer.

- [Features](#)
- [Call log support](#)
- [Single sign-on SSO](#)

Supported interaction types

PureConnect for Salesforce currently supports calls, callbacks, web chats, generic objects, and ACD-routed email and Salesforce email-to-case interactions. Other interaction types show up on the list of interactions but cannot be controlled from PureConnect for Salesforce. For fuller functionality, run the CIC client alongside Salesforce.

- [Call controls](#)
- [Callbacks](#)
- [Email](#)
- [Email-to-case](#)
- [Chats](#)

Get started

To use PureConnect for Salesforce, obtain credentials from your administrator, check the browser requirements, and log in.

- [Requirements](#)
- [Language support](#)
- [Log in](#)

Revised November 13, 2018

What's new in PureConnect for Salesforce

Genesys introduced the following changes and enhancements in PureConnect for Salesforce:

Note: Release dates in the future are projections and are subject to change.

August 14, 2018

- PureConnect for Salesforce Omni-Channel status sync

PureConnect for Salesforce Omni-Channel status sync now support the mapping of more than one status. Omni-Channel Sync Settings enable you to set single direction or bi-directional status mapping between Omni-Channel and PureConnect for Salesforce statuses. You can set multiple status maps and control the availability your agents for interactions in both systems. See the [PureConnect for Salesforce Integration Administrator's Guide](#) for details.

July 17, 2018

- Presence statuses for Omni-Channel now synchronize while using Salesforce Lightning Experience.

As in Salesforce Classic, you can use both PureConnect and Omni-Channel to route work to agents. You use status synchronization to ensure that agents are not routed interactions from both products simultaneously. See the [PureConnect for Salesforce Integration Administrator's Guide](#) for details.

May 1, 2018

- Transfer an interaction
Users can choose a "dial as digits" option in the Transfer dialog box.

April 17, 2018

- Call logs
The Call Log view displays a timer for securely paused interactions.

December 12, 2017

- Workgroup Queues view
The Workgroup Queues view enables agents to view queued up interactions in a selected workgroup within the PureConnect for Salesforce interface. A new **Workgroup Queues** button enables agents to display this view. Agents can pick up interactions from this view and add them to their My Interactions queue view.

October 31, 2017

- PureConnect for Salesforce
PureConnect for Salesforce has been renamed to PureConnect for Salesforce. The application now displays updated Genesys and PureConnect rebranding.

October 17, 2017

- Salesforce Omni-Channel Presence Sync
You can use both PureConnect and Salesforce Omni-Channel to route work to agents. This provides a consolidated agent experience without the typical problems associated with routing interactions. You can protect an agent from being routed interactions from both products simultaneously by setting statuses to sync between Omni-Channel and PureConnect in the Salesforce Call Center Settings. Agents can toggle between accepting work from Omni-Channel and accepting ACD interactions from PureConnect.

Note: The PureConnect for Salesforce Administrator can customize this status synchronization for your organization. Contact this administrator for instructions on using PureConnect for Salesforce and Omni-Channel together.

- New alerting console actions

Console events can trigger an action such as playing a chime when specific events occur. For example, two console events occur when an interaction is auto-answered by an agent. These events have parameters tied to the event, reason, and interaction ID.

Warning: The implementation of console events is reserved for Genesys PSO use only.

- Custom Interaction details

Custom Interaction details now control information displayed in the My Interactions tab in the Email and Chat popup windows. For more information, see [Customize interaction Details in the PureConnect for Salesforce Integration Administrator's Guide](#).

October 3, 2017

- Snippet Recordings

The new **Snip** button enables agents to make recordings that are stored in the CIC database. Snip creates SASF (Secure Authenticated Stream Format) files. Snippet recordings store not only the interaction recording but also participant and event data. Snippet recordings can be encrypted.

Requirements: The CIC administrator must configure Interaction Recorder to **Enable Snippet Recordings**. This administrator must also assign a **Recorder Access** license to an agent or the station they use. To make a snippet recording of a call, an agent also needs the **Snip Interactions Security** right.

September 19, 2017

- New Console Events

Two new console events occur when an interaction is auto-answered by an agent. See the [PureConnect for Salesforce Integration Administrator's Guide](#) for details.

- `inin.salesforce.constants.consoleevent.AUTO_ANSWSER_ACD_INTERACTIONS`
- `inin.salesforce.constants.consoleevent.AUTO_ANSWER_NON_ACD_INTERACTIONS`

August 8, 2017

- **SSO Provider**

The PureConnect for Salesforce administrator can limit allowed SSO providers to a single choice when you log on to PureConnect for Salesforce. Call Center settings control which SSO providers are available in the Login dialog box. For more information, see the [PureConnect for Salesforce Integration Administrator's Guide](#).

- **Forced Interaction Center logouts**

The PureConnect for Salesforce administrator can set a new General Server parameter, `INDEPENDENT_STATION_TIMEOUT` to a number of minutes. If the administrator also enables the **Prevent station logoff on navigation** Call Center Settings option, this forces CIC stations to log off the PureConnect for Salesforce integration when CIC does not detect any agent activity during the specified period. To enforce a timeout, CIC requires both this setting and the server parameter. This option requires CIC 2017 R3 Patch 8 or later.

- **Interaction Center station logouts prevented**

A new Call Center setting, **Prevent station logout on navigation**, creates an independent CIC station that prevents agents from being logged out when they navigate to a Salesforce page that does not contain the CIC client.

Note: To enforce a timeout for this independent station, the PureConnect for Salesforce administrator must also set a valid number of minutes in the **INDEPENDENT_STATION_TIMEOUT** General Server parameter. For more information, see the [PureConnect for Salesforce Integration Administrator's Guide](#).

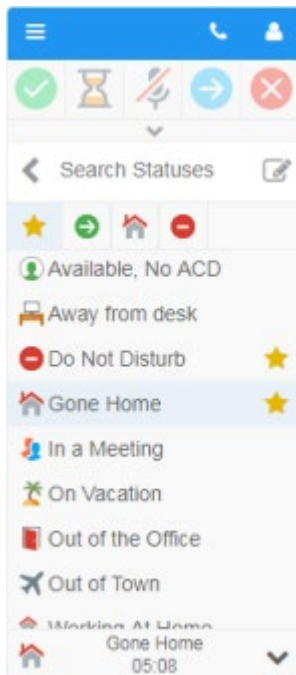
- **New audio library**

Sound effects work more reliably for newer versions of Chrome. We now use a new audio library, howler.js, to play audio instead of the standard HTML5 audio library. This enables you to use Chrome 59 and makes the audio feature consistent with PureCloud applications.

July 25, 2017 - 1.5.2150

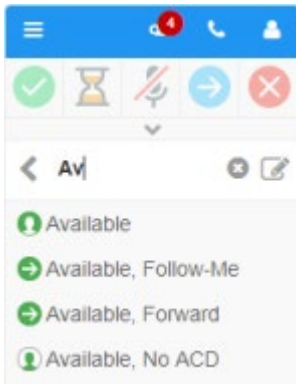
- **Favorite statuses**

You can designate selected statuses as favorites. Each status in the Status list has a Favorite status icon. When you hover over a status, this icon appears as a yellow star or blue outline star. A yellow star indicates a favorite status. Favorite statuses appear as buttons above the Status list. You can change your status simply by clicking a Favorite status button.



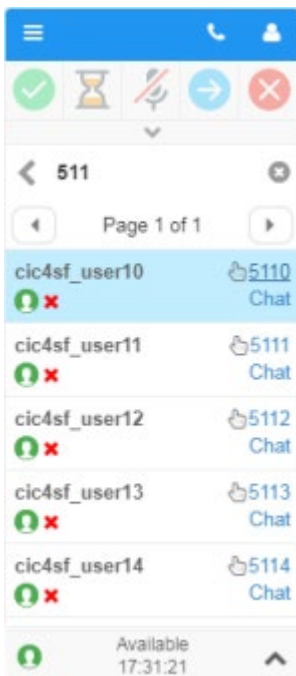
- **Searchable status**

Instead of scrolling through a long list of possible statuses, you can change your status by typing the name of a status in the Search Statuses text box and then selecting it.



- **Extension numbers**

Extension numbers now appear in the Directory view. Click an extension to call an agent. You can also search for an agent by extension number.



- **User experience improvements**

We have adjusted the colors, icons, and text in the CIC client interface to reflect the styles used in Interaction Connect. The icons for alerting interactions are now black, connected interaction icons are green, and held interaction icons are orange.

June 13, 2017 - 1.3.2096

- **Web-based phone**

The Web-Based Phone feature enables PureConnect for Salesforce users to use a web browser on a computer as a SIP telephone using WebRTC as the communication protocol. The Web-Based Phone eliminates the need to distribute, install, and configure a physical IP telephone for each agent or user, or to install a SIP soft phone application on PCs. Agents can test their microphones and speakers prior to and while using the Web-Based Phone.

Note: This feature requires CIC 2017 R4, CIC 2017 R3 Patch 5 or later, or CIC 2017 R2 Patch 10 or later.

- **Voicemail**

Voicemail messages are now routed to PureConnect for Salesforce. The messages appear in the new Voicemail view. This view includes controls for listening to voicemail messages, deleting messages or downloading them to your workstation.

Note: This feature requires CIC 2017 R3 or later.

May 16, 2017 - 1.3.2054

- **User agreement**

As part of the logon authentication process, you have the option of displaying a statement to which the user must agree before logging in.

April 19, 2017 - 1.3.2025

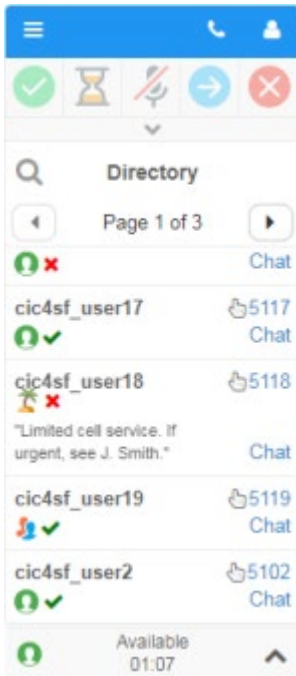
- **Lightening Experience support**

The PureConnect for Salesforce Lightning Experience offers significant advantages over the PureConnect for Salesforce integration in the Classic mode. In Classic mode, every time an agent takes an action, a new CIC session is created. This puts an additional load on the IC Server and off-server Session Managers. Lightning mode eliminates those page refreshes. The soft phone does not have to reload when Salesforce reloads with each page refresh. The PureConnect for Salesforce integration can then use one session for the duration of the day improving the scalability of PureConnect for Salesforce.

January 10, 2017 - build 1.2.1903

- **Agent's logged in status**

The Directory view shows whether an agent is logged in. A green check mark indicates the agent is logged in. A red X indicates the agent is logged out.



- **Call history view**

The Call History view displays information about your recent incoming and outgoing calls, including the name and phone number of the other party, the day and time of the call and its duration.

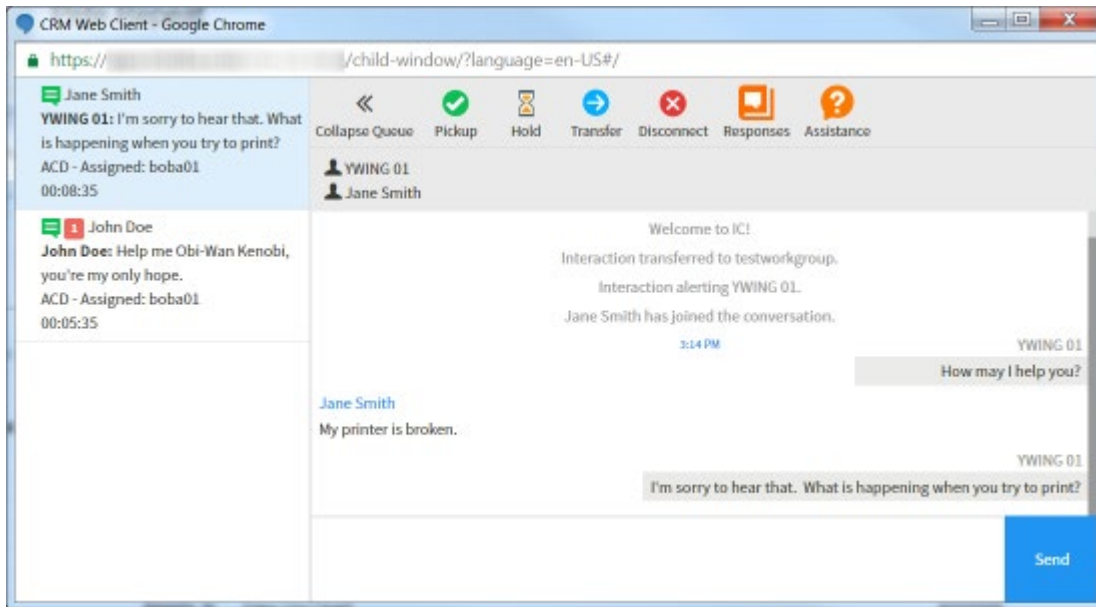
Note: This requires CIC 2015 R3 or later.

- **Change your password**

CIC alerts you at login when your password is about to expire. Use the new Change Password menu option to change your CIC password at any time.

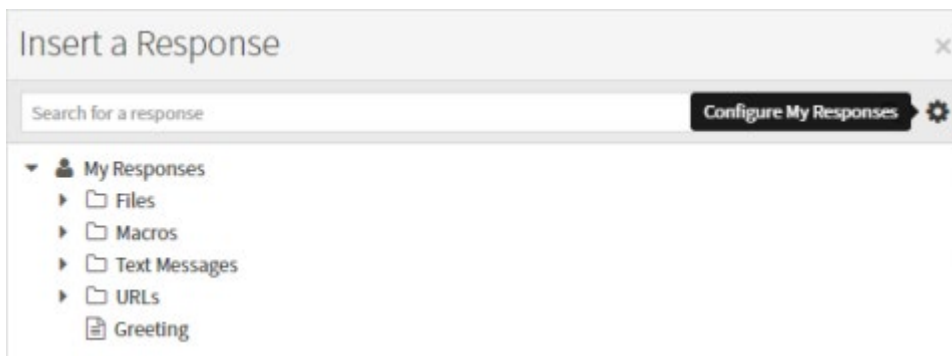
- **Chat window**

The redesigned Chat window has new controls for using Response Management or requesting assistance. See [Work with chats in PureConnect for Salesforce](#) for more details.



- **Create and use personal responses**

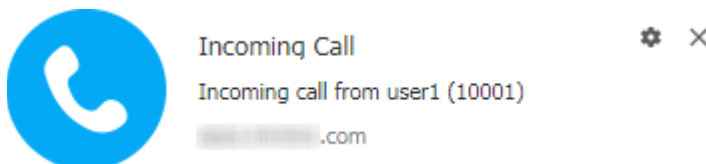
You can create personal response items that contain information you often need when handling interactions. You can create personal messages, store links to files on your workstation, and create hyperlinks to useful URLs. These responses are stored in a special category called **My Responses**. You can use these responses in chats and email replies.



- **Desktop alerts**

Desktop alerts notify you of alerting interactions when your browser is minimized.

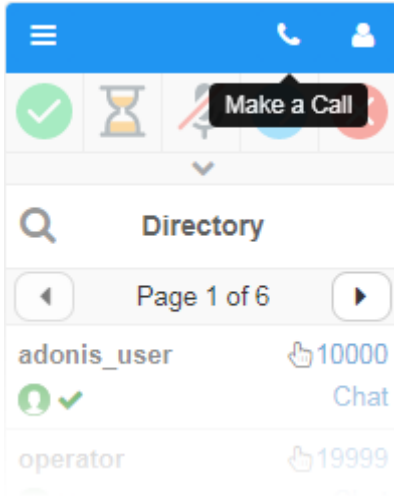
Note: This is supported for Chrome and Firefox.



- **Dial from all views**

The Make a Call button is now available on all views. Click the button and type the phone number.

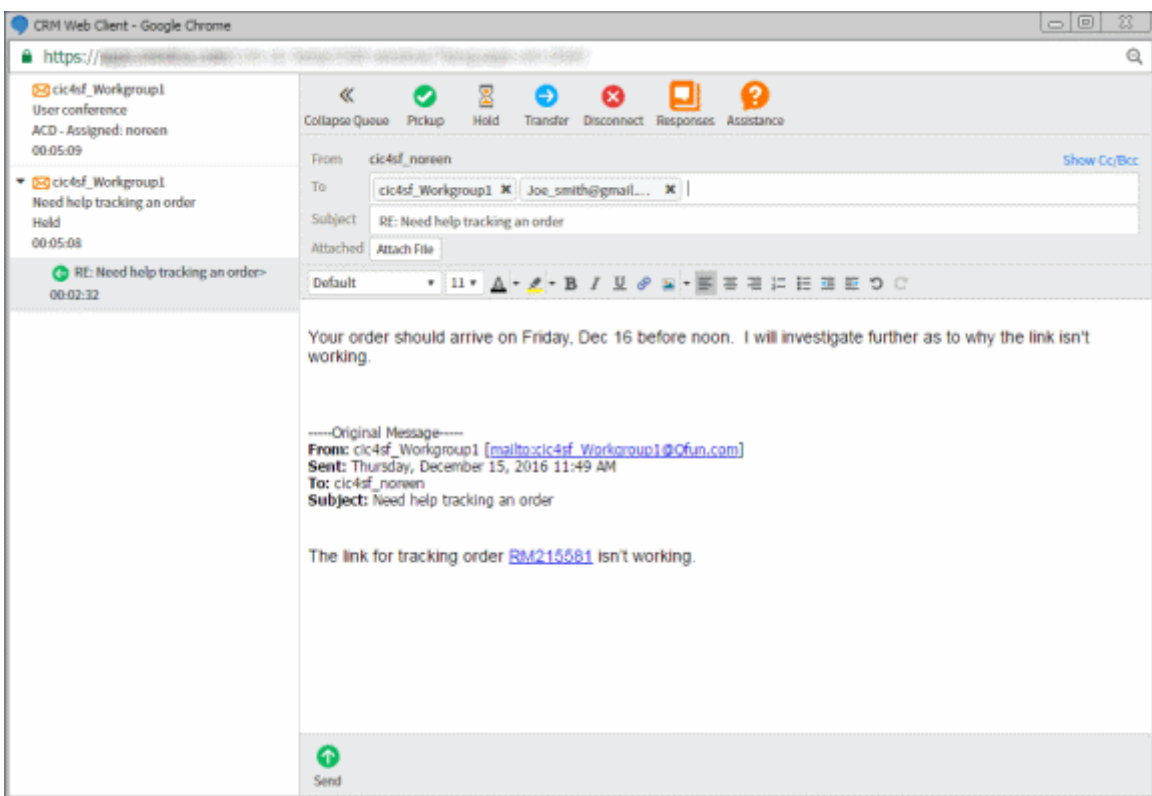
PureConnect for Salesforce



- **Email support**

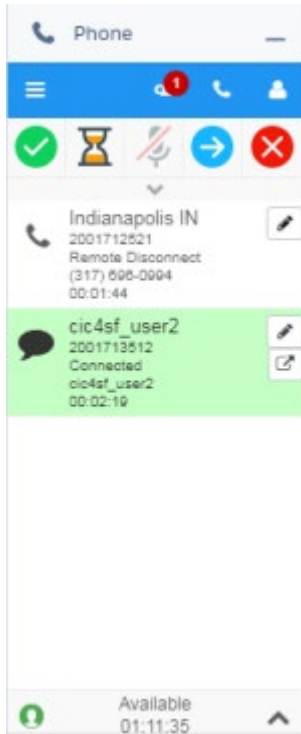
You can use PureConnect for Salesforce to read and respond to ACD-routed email messages.

Note: This requires CIC 2016 R2 or later.



- **Interaction duration**

The Interaction view displays interaction duration.



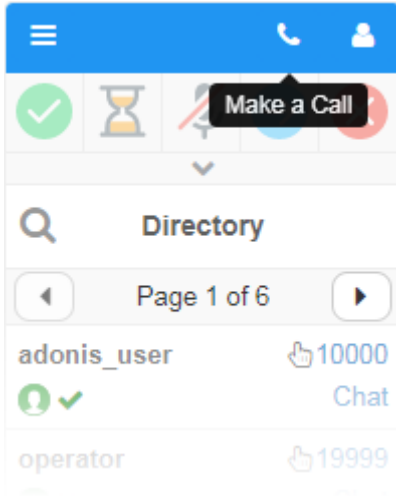
- **Localization of names**

PureConnect for Salesforce now uses the following logic to determine the formatting of names:

1. If available, the displayname in Interaction Administration is used over anything else, including first and last names.
2. If displayname is not available, then the name appears as “lastname, firstname”.
3. If displayname and firstname are not available, then only the lastname appears.
4. If displayname and lastname are not available, then only the firstname appears,
5. If displayname, lastname, firstname are not available, then the userID appears.

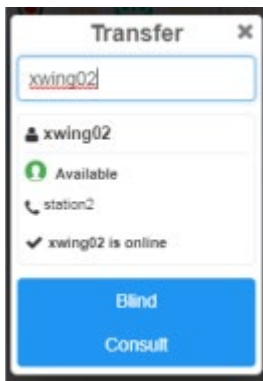
- **Make Call**

The new Make Call icon is available on every view and enables you to dial calls quickly.



- **On phone indicator for interaction transfers**

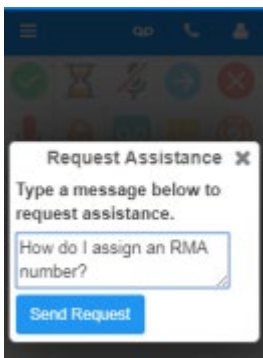
When you are about to transfer an interaction, a phone icon in the search results indicates the agent is already on a call.



- **Request assistance**

You can request assistance from your workgroup supervisor when you encounter an interaction for which you need help.

Note: This requires CIC 2015 R4 or later.



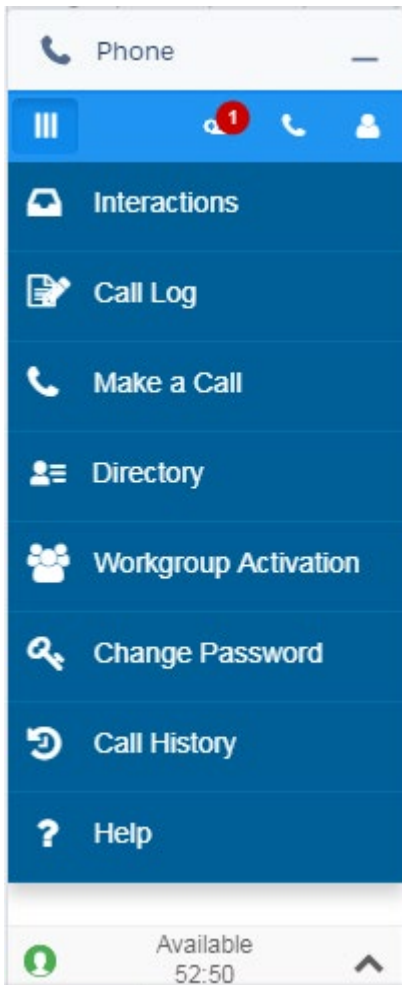
- **Status notes and details**

Depending on the status you select, you can set status details including status notes, forward number, and date and time you will become available. The date and time information you enter is played for all your incoming calls while in this status.

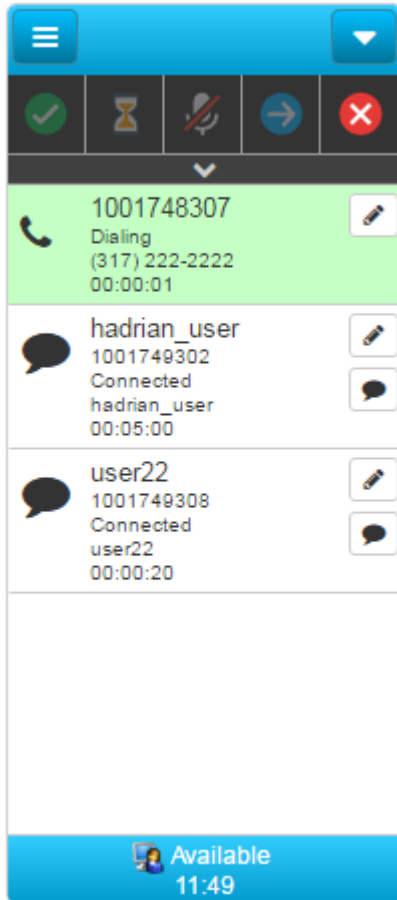
- **Workgroup activation status**

A new **Workgroup Activation** menu selection enables you to change your workgroup activation status.

Note: You need the **Activate self** Access Control right for the selected workgroup to change your workgroup activation status.



December 2, 2016 - build 1875



- **Time in Status display**

Your current status and the amount of time you have been in that status appear at the bottom of the PureConnect for Salesforce pane.

- **Call and Interaction Duration display**

Duration of a call or other interaction now appears in the Interactions view.

August 23, 2016 - build 1791

- **Transfer a call to an Attendant Profile**

You can now blind transfer a call to an Attendant profile. See [Transfer an interaction](#).

- **Use Response Management in a chat**

You can use stored responses to frequently asked questions, standard greetings, or other text that you type frequently in chats. Your CIC administrator can create these stored responses and grant you the required rights to use them in chats. See [Use response management in PureConnect for Salesforce](#).

- **Chat with other CIC users**

You can chat with another logged in CIC user. See [Start an intercom chat](#).

- **Spanish and French language support**

See [Language support in PureConnect for Salesforce](#) for more information.

PureConnect for Salesforce Release Notes

This page describes all the PureConnect for Salesforce releases. Most updates are automatic. For new features that require configuration, you must upgrade the managed package.

Tip: To subscribe to advance notice of upcoming releases, use the following link:

<http://eepurl.com/cyHY2T>.

Note: Release dates in the future are projections and are subject to change.

Date	Build	Description
August 14, 2018	1.6.2571	<ul style="list-style-type: none"> New Feature <p>PureConnect for Salesforce Omni-Channel status sync now supports the mapping of more than one status. Omni-Channel Sync Settings enable you to set single direction or bi-directional status mapping between Omni-Channel and PureConnect for Salesforce statuses. You can set multiple status maps and control the availability of your agents for interactions in both systems. See the PureConnect for Salesforce Integration Administrator's Guide for details.</p> Bug Fix <p>Fix browser popup window incorrectly popping to a URL or object.</p>
July 17, 2018	1.6.2552	<ul style="list-style-type: none"> New Features <ul style="list-style-type: none"> Presence statuses for Omni-Channel now synchronize while using Salesforce Lightning Experience. <p>As in Salesforce Classic, you can use both PureConnect and Omni-Channel to route work to agents. You use status synchronization to ensure that agents are not routed interactions from both products simultaneously. See the PureConnect for Salesforce Integration Administrator's Guide for details.</p> Bug Fixes <ul style="list-style-type: none"> Email-to-Case opening a browser popup window with an invalid URL while using Lightning Experience has been resolved. <p>Note: This feature requires the Salesforce Summer '18 Release. For more information, see the Salesforce Summer '18 Release Notes, HTML format or PDF format.</p>
May 1, 2018	1.6.2454	<ul style="list-style-type: none"> New Features <ul style="list-style-type: none"> Users can choose a "dial as digits" option in the Transfer dialog box. Bug Fixes <ul style="list-style-type: none"> Agent status and Time in Status are more accurate and better in sync with the IC

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Server.

April 17, 2018	1.6.2430	<ul style="list-style-type: none">• New Features<ul style="list-style-type: none">• The Call Log view displays a timer for securely paused interactions.• Bug Fixes<ul style="list-style-type: none">• Audio issues tied to persistent ringing have been resolved.
December 26, 2017	1.5.2397	<ul style="list-style-type: none">• Bug Fixes<ul style="list-style-type: none">• The calendar control under "Status Notes" was not showing the correct locale date formatting for the "fr-CA" and "es-US" locales. This has now been corrected.
December 12, 2017	1.5.2388	<p>The Workgroup Queues view is now available inside PureConnect for Salesforce. A new Workgroup Queues button enables agents to display this view. The view contains queued interactions in a selected workgroup. Agents can pick up interactions from this view and add them to their My Interactions queue view.</p> <p>Note: Currently this view supports only the English language. Further localization will be introduced in an upcoming release.</p>
November 28, 2017	1.5.2373	<ul style="list-style-type: none">• Bug Fixes<ul style="list-style-type: none">• Console events for ACD/Non-ACD interactions now work consistently.
October 31, 2017	1.5.2352	<ul style="list-style-type: none">• PureConnect for Salesforce now displays updated Genesys and PureConnect branding.• Bug Fixes<ul style="list-style-type: none">• Call control button rows no longer overflow when more than ten buttons are visible.• Calendar within status notes is now localized. <p>Note: You need the latest version of the PureConnect for Salesforce managed package to take advantage of these features. See "Install or Upgrade the managed package" in the PureConnect for Salesforce Integration Administrator's Guide.</p>
October 17, 2017	1.5.2315	<ul style="list-style-type: none">• Salesforce Omni-Channel Presence Sync is available. You can use both PureConnect and Omni-Channel to route work to agents. You use status synchronization to ensure that agents are not routed interactions from both products simultaneously. See the PureConnect for Salesforce Integration Administrator's Guide for details.• New alerting console actions <p>Note: The implementation of these console events is reserved for Genesys PSO use only. A general description of console events is available in the PureConnect for Salesforce Integration Administrator's Guide.</p> <ul style="list-style-type: none">• Custom Interaction details now control information displayed in the My Interactions tab in the Email and Chat popup windows. For more information, see Customize interaction

Details in the [PureConnect for Salesforce Integration Administrator's Guide](#).

- Bug Fixes
 - Persistent connection checkbox now retains state correctly.
 - Directory view has been optimized and now results in a smaller server fingerprint.

Note: You need the latest version of the PureConnect for Salesforce managed package to take advantage of these features. See “Install or Upgrade the managed package” in the [PureConnect for Salesforce Integration Administrator's Guide](#).

October 3,
2017

1.5.2289

- Agents can now make snippet recordings of calls.

The new **Snip** button enables you to make recordings that are stored in the CIC database. Snip creates SASF (Secure Authenticated Stream Format) files. Snippet recordings store not only the interaction recording but also participant and event data. Snippet recordings can be encrypted.

Requirements: Your CIC administrator must configure Interaction Recorder to **Enable Snippet Recordings**. This administrator must also assign a **Recorder Access** license to you or the station you are using. The **Snip** Interactions Security right enables you to make a snippet recording of a call.

- Bug Fixes
 - When attempting to save the call log for a "User" object type, we now gracefully exit since Salesforce does not support this action.
 - Type-ahead functionality within the Transfer dialogue is now more scalable.
 - Benign errors appearing within the console no longer appear.
 - The file, salesforce.css, is no longer required by or requested from PureConnect for Salesforce.

September
19, 2017

1.5.2276

- Two new Salesforce console events are raised when an interaction is auto-answered by an agent. See the [PureConnect for Salesforce Integration Administrator's Guide](#) for details.
 - `inin.salesforce.constants.consoleevent.AUTO_ANSWSER_ACD_INTERACTIONS`
 - `inin.salesforce.constants.consoleevent.AUTO_ANSWER_NON_ACD_INTERACTIONS`

September
5, 2017

1.5.2268

- Bug Fixes
 - The Transfer dialog box shows a message indicating additional entries are available when a lookup returns many results.
 - "Always use this Authentication Type" checkbox works as expected. When using Single-Sign-On in combination with this setting, agents now auto-login upon navigation to Salesforce if they hadn't logged out directly in the previous session. Please note, you must allow popups for salesforce.com.

PureConnect for Salesforce

August 8,
2017

1.5.2213

- A new Call Center setting, **Prevent station logout on navigation**, creates an independent station that prevents agents from being logged out when they navigate to a Salesforce page that does not contain the CIC client.
- The PureConnect for Salesforce administrator can set a new General Server parameter **INDEPENDENT_STATION_TIMEOUT** to a number of minutes. If the administrator also enables the **Prevent station logoff on navigation** Call Center Settings option, this parameter forces CIC stations to log off the PureConnect for Salesforce integration when CIC does not detect any agent activity during the specified period. To enforce a timeout, CIC requires both this setting and the server parameter. This option requires CIC 2017 Patch 8 or later.
- The PureConnect for Salesforce administrator can use a Call Center setting to limit allowed SSO providers to a single choice.
- Sound effects work more reliably for newer versions of Chrome. We now use a new audio library, howler.js, to play audio instead of the standard HTML5 audio library. This enables you to use Chrome 59 and makes the audio feature consistent with PureCloud applications.

Note: You need the latest version of the PureConnect for Salesforce managed package to take advantage of these features. See “Install or Upgrade the managed package” in the [PureConnect for Salesforce Integration Administrator's Guide](#). You also need IC Server 2017R3 Patch 8, 2017R4 Patch 1, or later in order to take advantage of the new **Prevent station logoff on navigation** features.

- Bug Fixes
 - Error messages appear correctly in new user interface.
 - Wrapup prompt persists after browser refresh when user has multiple sessions.
 - Time in status calculation is adjusted for server time.
 - Call log associations are improved for reliability.
 - Consult transfer behaviors are more reliable.

July 25,
2017

1.5.2150

- You can designate selected statuses as favorites. Favorite statuses appear as buttons above the Status list. You can change your status simply by clicking a Favorite status button.
- Instead of scrolling through a long list of possible statuses, you can change your status by typing the name of a status in the Search Statuses text box and then selecting it.
- Extension numbers now appear in the Directory view. Click an extension to call an agent. You can also search for an agent by extension number.
- We have adjusted the colors, icons, and text in the CIC client interface to reflect the styling used in Interaction Connect. The icons for alerting interactions are now black, connected interaction icons are green, and held interaction icons are orange.
- Bug Fixes

		<ul style="list-style-type: none"> • Make call button is no longer enabled before station selection has finished upon log • User Agreement accept and reject buttons are now completely clickable.
June 27, 2017	1.4.2119	<ul style="list-style-type: none"> • Bug Fixes <ul style="list-style-type: none"> • Login no longer fails when cookies are cleared after enabling SSO within the call center tab. • Secondary screen pops no longer occur when logging in from two separate browser windows and picking up or disconnecting interactions in different tabs. • Agents are now redirected to login menu when their session has ended due to inactivity after PC going to sleep.
June 13, 2017	1.3.2096	<ul style="list-style-type: none"> • Web-Based Phone (PureCloud WebRTC) functionality is now available. Audio testing has been added to allow users in Interaction Connect and PureConnect for Salesforce to test their microphones and speakers prior to and while using the Web-Based Phone for better user confidence. <p>Note: This feature requires: CIC 2017 R4, CIC 2017 R3 Patch 5 or later, or CIC 2017 R2 Patch 10 or later.</p> <ul style="list-style-type: none"> • Voicemail messages are now routed to PureConnect for Salesforce. The messages appear in the new Voicemail view. This view includes controls for listening to voicemail messages, deleting messages or downloading them to your workstation. <p>Note: This feature requires CIC 2017 R3 or later.</p> <ul style="list-style-type: none"> • Bug Fixes <ul style="list-style-type: none"> • Agents logged into PureConnect for Salesforce under a PureConnect Cloud platform will now correctly auto-logout when a switchover event occurs.
May 30, 2017	1.3.2067	<ul style="list-style-type: none"> • Bug Fixes <ul style="list-style-type: none"> • PureConnect for Salesforce caches alternative hosts associated with off-site session manager instances such that subsequent logins attempt using these instances as opposed to the primary. This should improve connection reliability and promote stability. • When converting a lead to an opportunity, auto-association correctly associates the contact and account within the PureConnect for Salesforce window after conversion is completed. • Automatic reconnect is more reliable after navigating away and then back from a different web page. • Dialer calls are more reliable and cases where disconnections would intermittently occur have been resolved.
May 16, 2017	1.3.2054	<ul style="list-style-type: none"> • Added support for the User Agreement to PureConnect for Salesforce. When the User Agreement is configured in Interaction Administrator, agents must accept the agreement

PureConnect for Salesforce

before logging in.

- Bug Fixes
 - Fixed an issue when new chat messages are delivered that could prevent the chat window from scrolling to the new message
 - Localization improvements

May 2,
2017

1.3.2040

- Added option to create call logs for interactions that have not been connected
- Bug Fixes
 - Fixed issue preventing call logs from being saved when associated with a Lead that converted before the call log is saved
 - Record button is not shown for users that do not have record rights
 - Status Notes field is not shown for users who do not have the Status Notes Security Right

Note: You need the latest version of the PureConnect for Salesforce managed package to take advantage of these features. See “Install or Upgrade the managed package” in the [PureConnect for Salesforce Integration Administrator's Guide](#).

April 19,
2017

1.3.2025

- Bug Fixes
 - Fixed issue when using Single Sign-On that caused PureConnect for Salesforce to immediately re-login after logging out.
 - Localization improvements

April 4,
2017

1.3.2006

- Support for the Salesforce Lightning Experience

• **Note:** Lightning Experience support requires the latest version of the PureConnect for Salesforce managed package. See “Install or Upgrade the managed package” in the [PureConnect for Salesforce Integration Administrator's Guide](#).

Once the latest version of the managed package is installed, a new “PureConnect for Salesforce Lightning” call center will be available in your Salesforce organization. This call center will need to be configured before moving users to the new call center. Instructions are available in the [PureConnect for Salesforce Integration Administrator's Guide](#).

The PureConnect for Salesforce v3 call center does not support Lightning Experience.

March 21,
2017

1.2.1979

- Bug Fixes
 - Fixed issue that caused “Failed to save a call log” errors when associating an Interaction with a Lead
 - Fixed performance issue that caused the application to take longer to reconnect after page navigation

- Fixed timing issue that could cause a call log subject to be blank
 - Fixed issue where PureConnect for Salesforce was requesting a non-existent file resulting in an HTTP 403 error in the logs

- March 7, 2017

1.2.1964

 - Advanced Dial options, account codes and workgroups, now support searching and improved user interface
 - Bug Fixes
 - Long workgroup names are no longer cut off in Workgroup Activation view
 - Fixed issue that could cause the callback retry and disposition buttons to be hidden behind the status under certain browser configurations

- February 21, 2017

1.2.1952

 - Picking up a chat or email will open the popup window if needed
 - Add search support for Workgroup selection in Advanced Dial
 - Screen pops are now suppressed for calls going to voicemail
 - Localization improvements for French, Japanese, and Spanish
 - Bug Fixes
 - PureConnect for Salesforce returns to the login screen if it gets disconnected unexpectedly
 - Fixed issue where Advanced Dial would need to be clicked a few times to be displayed
 - Fixed issue with wrap-up code assignment segment ID and time
 - Fixed issue that caused the application to use outdated Call Center configuration values
 - Fixed license warning when license was applied to the station instead of the user

- January 20, 2017

1.2.1927

 - Bug Fixes
 - Fixed issue that caused agents to be logged out of Dialer Campaigns
 - Improved reconnection process when the Salesforce page navigates causing the application to reload
 - Fixed Help links

- January 17, 2017

1.2.1919

 - Added Interaction ID to Call History view
 - Notifications display under additional circumstances
 - Introduced client heartbeat to identify and clean up stale sessions on the server
 - Bug fixes
 - Fixed issue that could prevent some features from working until the agent viewed them in the application

PureConnect for Salesforce

		<ul style="list-style-type: none">○ Fixed UI issue that could cause the Change Password button to run off the screen if too many password validation errors are shown
January 12, 2017	1.2.1911	<ul style="list-style-type: none">• Bug fix<ul style="list-style-type: none">○ Fixed an issue that prevented call logs from being saved in Salesforce.
January 10, 2017	1.2.1903	<ul style="list-style-type: none">• Agent's Logged in status displayed in Directory• Call history view• Change your password• Change your workgroup activation status• Chat window redesigned• Create and use personal responses• Desktop alerts• Dial from all views• Directory view shows whether an agent is logged in• Email support• Interactions view displays interaction duration• Localization of names• On phone indicator for interaction transfers• Request assistance• Status notes and details
December 2, 2016	1.1.1875	<ul style="list-style-type: none">• Time in Status display• Call and Interaction Duration display• Bug fixes.<ul style="list-style-type: none">○ Fixed issue that could occasionally cause messages sent from the server to missed when using Server-Sent Events
November 9, 2016	1.1.1868	<ul style="list-style-type: none">• Bug fixes.• Fixed issue that could cause PureConnect for Salesforce to get stuck while loading.
November 1, 2016	1.1.1857	<ul style="list-style-type: none">• Bug fixes.<ul style="list-style-type: none">○ Improved resiliency of the event retrieving mechanisms (polling and push events) in PureConnect for Salesforce.○ Improved startup performance for faster initial connections

		<ul style="list-style-type: none"> ○ Chat reply text entered while one chat was selected will no longer bleed over to if another chat is selected.
October 13, 2016	1.1.1838	<ul style="list-style-type: none"> • Bug fixes. <ul style="list-style-type: none"> ○ Fixed issue running PureConnect for Salesforce side-by-side with Interaction Desktop caused by last release.
October 12, 2016	1.1.1837	<ul style="list-style-type: none"> • Bug fixes. <ul style="list-style-type: none"> ○ Fixed issue that could cause agents to be logged out of their station after a browser page navigation. ○ Fixed issue that caused an error when attempting a screen pop for calls marked private.
October 4, 2016	1.1.1814	<ul style="list-style-type: none"> • Bug fixes. <ul style="list-style-type: none"> ○ Fixed issue that sometimes caused the application to repeatedly set the station after initial login or when changing station, causing the station label and the status menu to flicker between visible and hidden. ○ Directory view shows whether the users are logged in.
September 20, 2016	1.1.1798	<ul style="list-style-type: none"> • Bug fixes. <ul style="list-style-type: none"> ○ Fixed issue that prevented the directory view from loading in some circumstances. ○ Fixed issue that prevented the wrap-up code from being saved to Salesforce that occurs after the interaction has been removed.
August 23, 2016	1.1.1791	<ul style="list-style-type: none"> • Transfer a call to an Attendant Profile. • Use Response Management in a chat <p>Note: Response Management support requires CIC version 2016 R2 or later.</p> <ul style="list-style-type: none"> • Initiate chat with other CIC users. • Support for push events for a faster user experience <p>Note: Push events require CIC version 2016 R3 or later and the latest version of the PureConnect for Salesforce managed package. See Install or Upgrade the managed package in the PureConnect for Salesforce Integration Administrator's Guide.</p> <ul style="list-style-type: none"> • Added language support for Spanish and French <p>Note: Previously supported only English and Japanese.</p> <ul style="list-style-type: none"> • Bug fixes.
July 22,	1.0.1771	<ul style="list-style-type: none"> • Bug fixes.

PureConnect for Salesforce

2016

June 20, 2016	1.0.1762	<ul style="list-style-type: none">• Bug fixes.
May 12, 2016	1.0.1760	<ul style="list-style-type: none">• Bug fixes.
April 15, 2016	1.0.1753	<ul style="list-style-type: none">• Screen pop search parameters are now passed as query string parameters when popping to a custom Visualforce page. The search parameter is always passed using the query string parameter name 'key'. e.g. 'apex/CustomPage?key=1235551234'.• Bug fixes.
March 31, 2016	1.0.1713	<ul style="list-style-type: none">• Bug fixes.
March 3, 2016	1.0.1643.20	<ul style="list-style-type: none">• Bug fixes.
February 18, 2016	1.0.1616	<ul style="list-style-type: none">• Support person accounts.• Japanese language support.• Bug fixes.
February 4, 2016	1.0.1563.17	<ul style="list-style-type: none">• Auto-associate who and what on custom click-to-dial.• Conference wrap-up code support.• Bug fixes.
January 7, 2016	1.0.1482	<ul style="list-style-type: none">• Customize display of interaction details.• Option to enable or disable call logs.• License check functionality; notifications will be shown to users who are not license• Bug fixes.

Note: You need the latest version of the PureConnect for Salesforce managed package to take advantage of these features. See [Install or Upgrade the managed package in the PureConnect for Salesforce Integration Administrator's Guide](#).

December 17, 2015	1.0.1443.14	<ul style="list-style-type: none">• Advanced activity attribute mapping to map interaction attributes to Salesforce attributes. Keywords are provided for ANI, DNIS, and Conference.• Double-click an interaction to pick up.• Wrap up and call duration saved in call logs.• ID of the Salesforce activity record that corresponds to the call log is saved as an
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interaction attribute.

Note: You need the latest version of the PureConnect for Salesforce managed package to take advantage of these features. See [Install or Upgrade the managed package in the PureConnect for Salesforce Integration Administrator's Guide](#).

December 3, 2015

1.0.1422

- Call center settings moved from the call center definition to a separate configuration page. See [Upgrade from version 2.3 or earlier of the managed package in the PureConnect for Salesforce Integration Administrator's Guide](#).
- New Auto Association on Navigation setting in the call center settings. If enabled, when the agent navigates to a different Salesforce record while the call is live, that record is dynamically selected for the Name or Related To fields.
- Double-click a disconnected interaction to redial.
- New menu item for company directory, where you can search for and place calls to agents in the directory.

Note: You need the latest version of the PureConnect for Salesforce managed package to take advantage of these features. See [Install or Upgrade the managed package in the PureConnect for Salesforce Integration Administrator's Guide](#).

November 19, 2015

1.0.1394.11

- Set an Available, Forward status with a forwarding number and notes.
- Save advanced dialing preference (open or closed) for the logged on agent.
- Hide broken image icons for statuses without an icon.
- View in Salesforce button saves the call log.
- Added more automation to support localization.

November 13, 2015

1.0.1353

- Secure pause call control.
- Dial pad call control for DTMF support.
- Send to Voicemail call control for incoming or connected calls.

October 26, 2015

1.0.1318.9

- Citrix environment support.
- Differentiate between inbound, outbound, and internal call types in call logs.
- Record a call.
- Click-to-dial enhancements: pre-populate phone number for advanced dial, auto-associate Salesforce record to call log.
- Bug fixes.

October 7, 2015

1.0.1207.7

- Interaction Dialer support, including blended agents, campaign logon/logoff, preview timer, request break, dispositions, and scheduled callbacks.
- Web chat support.

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		<ul style="list-style-type: none">• Wrap-up code support.
		Note: Interaction Dialer, web chat, and wrap-up codes support requires CIC version 2015 R4 or later.
		<ul style="list-style-type: none">• Enforce user permission for persistent connection.• Advanced dialing support, dial on behalf of account code and workgroup.• Generic object support.• Screen pop only on active tab.• Bug fixes.
September 4, 2015	1.0.1096	<ul style="list-style-type: none">• Callback support.
		Note: Callback support requires CIC version 2015 R4 or later.
		<ul style="list-style-type: none">• Integrated Google Analytics for increased supportability of the product.• Keyboard shortcuts in Salesforce for the softphone.• Salesforce CTI methods to support custom interaction logs. Localization for future language support.• Removed Feedback menu option. Contact product support with feedback instead.
August 5, 2015	0.0.0958	<ul style="list-style-type: none">• Call logs for conference calls.• CIC Switchover Server support for on premise and CaaS.
July 21, 2015	0.0.0932	<ul style="list-style-type: none">• Call log enhancements.• Single sign-on support.• Basic conference call support.• Ability to change and save stations within session.• Bug fixes.
June 5, 2015	0.0.0843	<ul style="list-style-type: none">• Initial release of PureConnect for Salesforce. Includes support for basic call controls, call logs, screen pop, and click-to-dial.

Browser requirements for PureConnect for Salesforce

Your browser running the integration must be the latest version of Firefox or Chrome, or Microsoft Edge.

Note: PureConnect for Salesforce no longer supported Internet Explorer after the release of PureConnect 2018 R5.

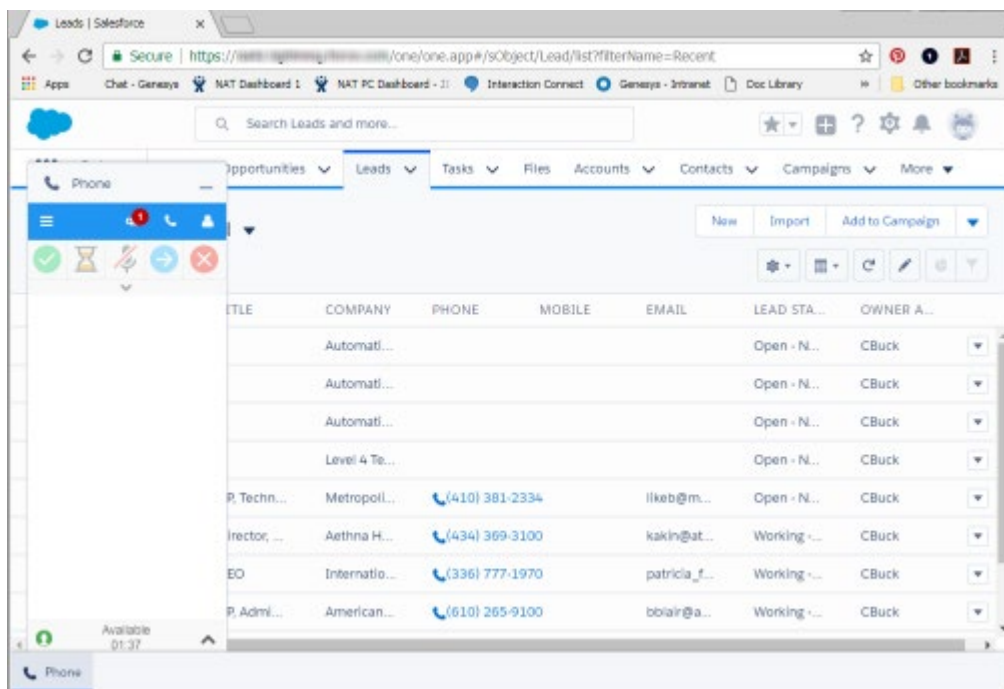
CIC Client

Depending on the version of PureConnect for Salesforce, the position and appearance of the CIC client can change. The menus and call controls remain the same.

Lightning Experience

You can display or hide the CIC client inside the PureConnect for Salesforce experience. Display the CIC client by clicking the Phone icon in the lower left corner. Use the minimize control (—) in the CIC client to hide it.

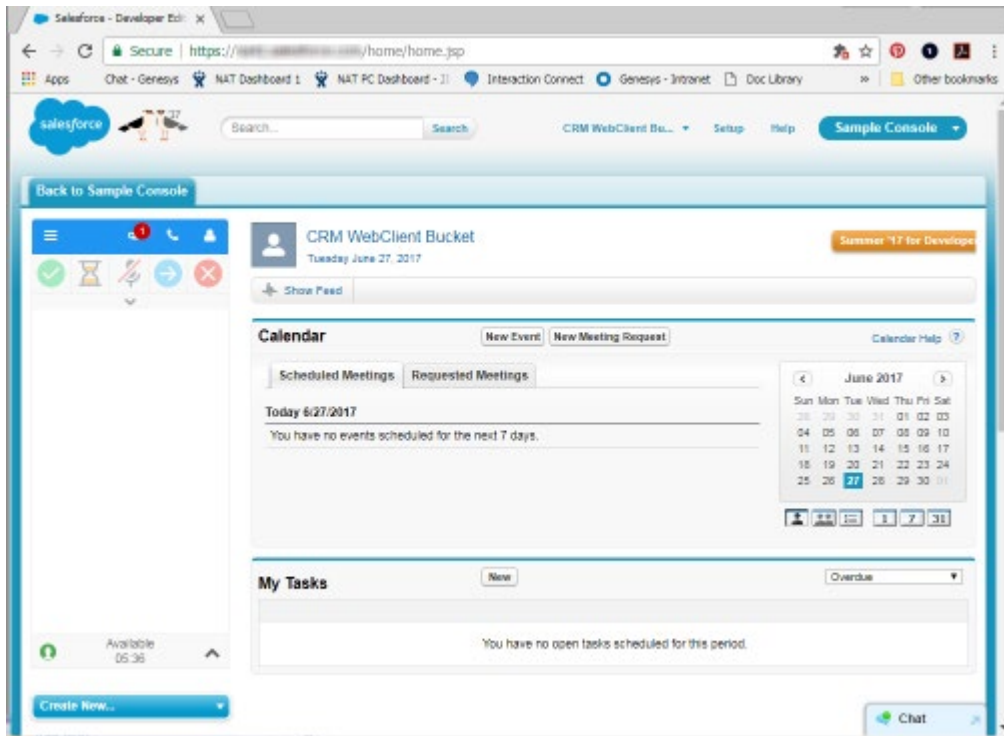
The PureConnect for Salesforce Lightning Experience offers significant advantages over the PureConnect for Salesforce integration in the Classic mode. For more information, see [Lightning Experience support](#).



Classic mode

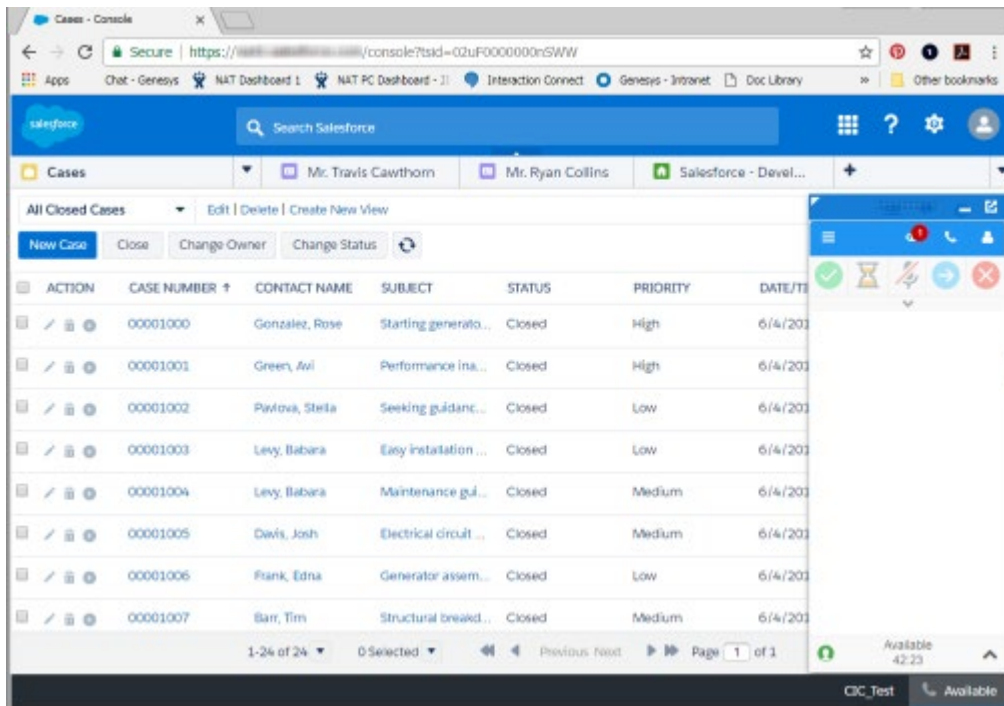
PureConnect for Salesforce Classic mode contains a permanently displayed and docked CIC client.

PureConnect for Salesforce



Console mode

PureConnect for Salesforce Console mode also contains a CIC client that you can display or minimize. This version of the CIC client is located in the lower right corner.



Web-based phone

The Web-Based Phone feature enables PureConnect for Salesforce users to use a web browser on a computer as a SIP telephone using WebRTC as the communication protocol. The Web-Based Phone eliminates the need to distribute, install, and configure a physical IP telephone for each agent or user, or to install a SIP soft phone application on PCs.

User requirements

- Your PureCloud Telephony Administrator must assign you an extension number from a PureCloud extension pool.

Note: The Web-Based Phone Configuration Wizard available in Interaction Administrator creates extension pools and assigns extension numbers automatically. For more information, see [Configure Web-based phone feature](#).

Workstation requirements

- Speakers and microphone (or headset)
- Supported web browser
 - Google Chrome - version 47 or higher
 - Mozilla Firefox - version 44 or higher

Note: Internet Explorer does not support WebRTC phones.

CIC requirements

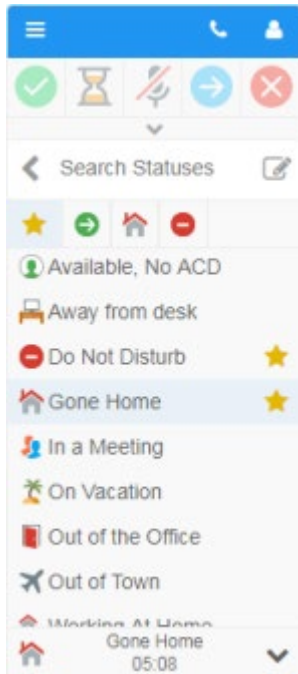
- PureCloud Communicate integration license for CIC
- PureCloud Edge appliance
- CIC 2017 R4, CIC 2017 R3 Patch 5 or later, or CIC 2017 R2 Patch 10 or later for on-premise CIC or PureConnect Cloud/CaaS.

PureConnect for Salesforce features

PureConnect for Salesforce is a version of the CIC client with an abbreviated feature set. PureConnect for Salesforce offers the following functionality.

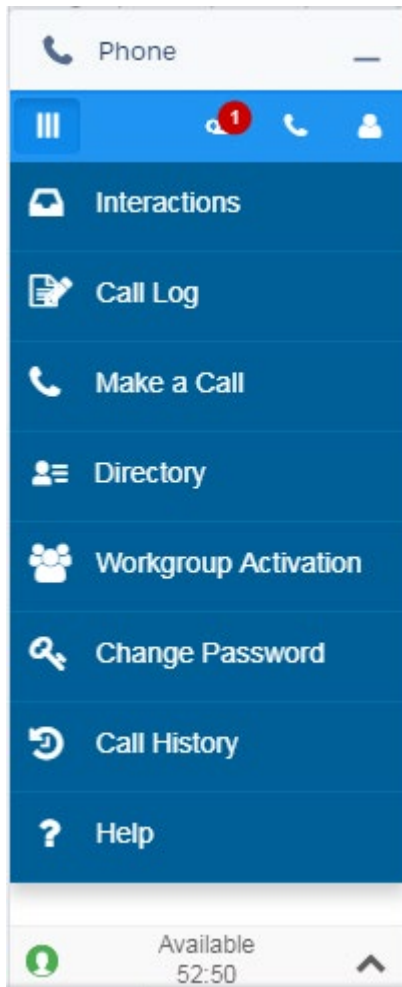
Statuses

Quickly change your status from the Favorites toolbar or the Status List. Status stays in sync with the CIC client. For more information, see [Statuses in PureConnect for Salesforce](#).



Menu

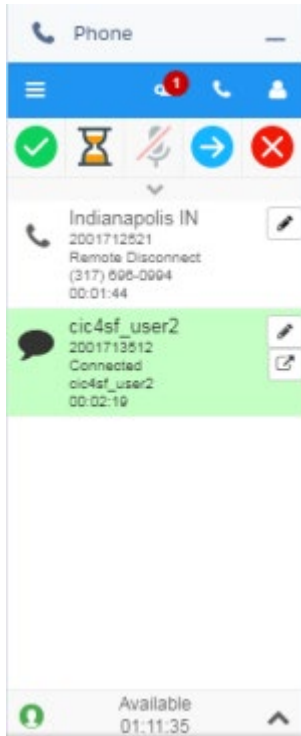
From the menu, quickly jump to your interactions, view the active interaction's call log, access Interaction Dialer campaigns (if enabled), make an outbound call, view the directory, or read product help.



Interactions

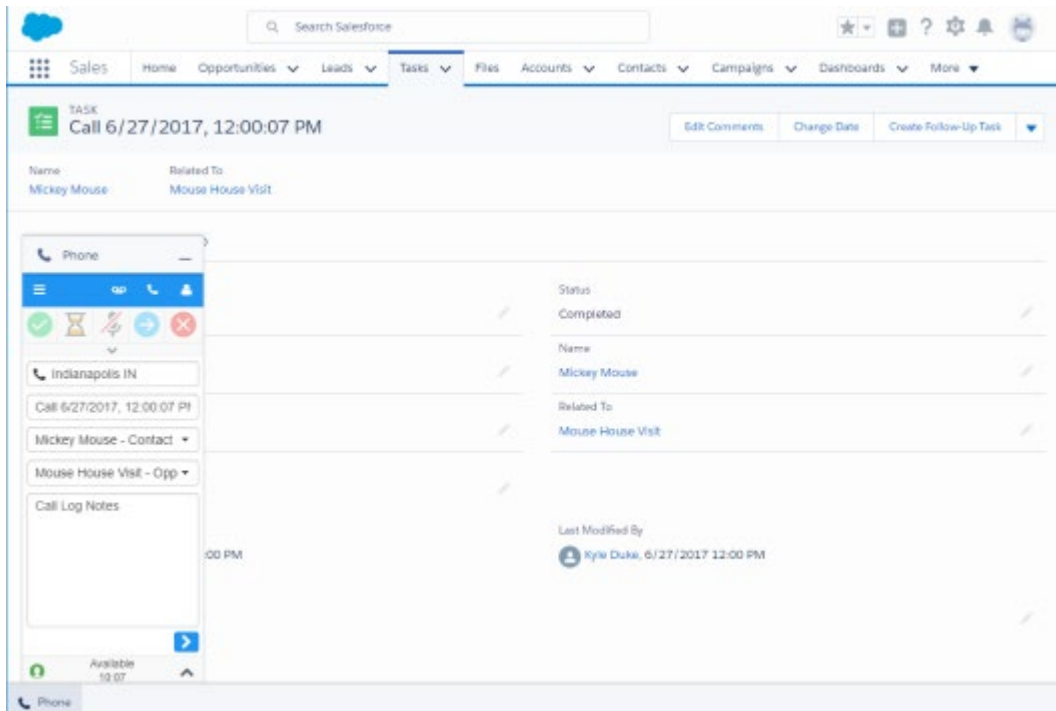
A list of active and recently disconnected interactions gives you quick access to call controls and call logs. PureConnect for Salesforce currently supports calls, call backs, web chats, generic objects, ACD-routed email, and email-to-case interactions. For more functionality, run the CIC client alongside Salesforce.

Icons and other indicators show that the interaction is connected, on hold, and so on. The Interactions view also displays the interaction duration. You can [initiate a transfer](#) or [conference call](#) from this view.



Call log

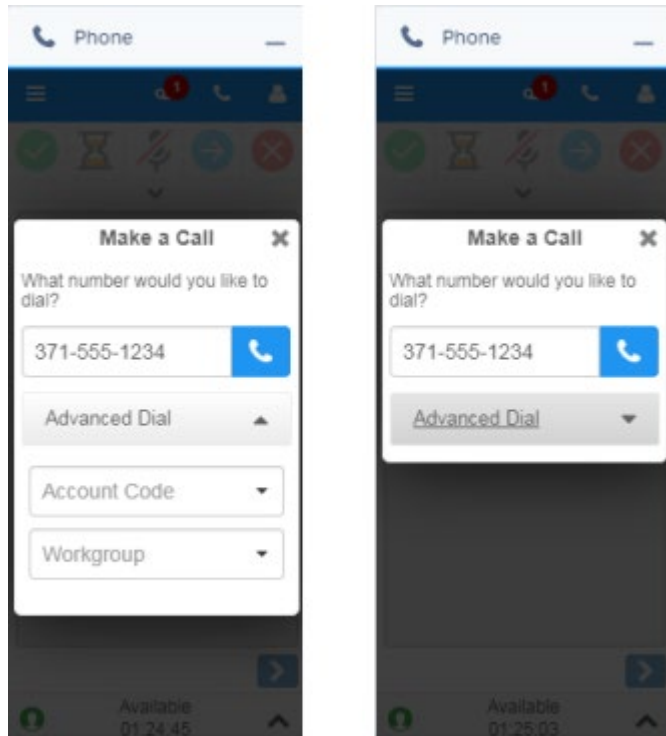
The [call log](#), accessed from the menu or pencil icon on any interaction, is the default view after picking up an interaction. As the agent navigates through Salesforce while the call is live, those records dynamically add to the **Name** and **Related To** drop down lists. Click the arrow to view the call log history in Salesforce.



Make a call

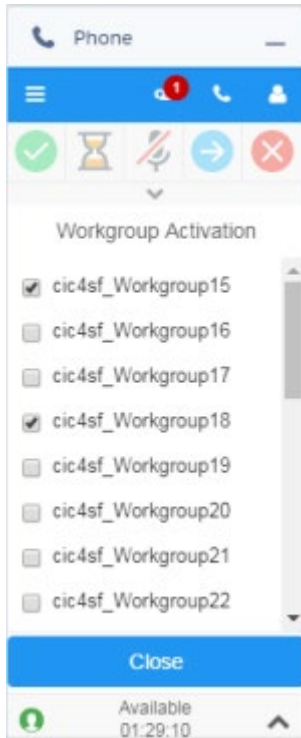
This screen allows you to place a manual outbound call. If Advanced Dialing is enabled, you can dial a number on behalf of a specific account code and/or workgroup.

Tip: The Advanced Dialing feature enables you to associate an Account Code and Workgroup with a call. If the CIC administrator appropriately configures Advanced Dialing in Interaction Administrator, you have the option of enabling or disabling this feature in PureConnect for Salesforce on a per user basis. Expanding the Advanced Dial section of the Make a Call dialog box enables the feature; collapsing this section disables it.



Workgroup Activation

In order to receive an ACD workgroup call, you must be logged in, have your workgroup activation status set to **Active** and set your status to an available type. This dialog box enables you to change your workgroup activation status.



See also [Call controls](#).

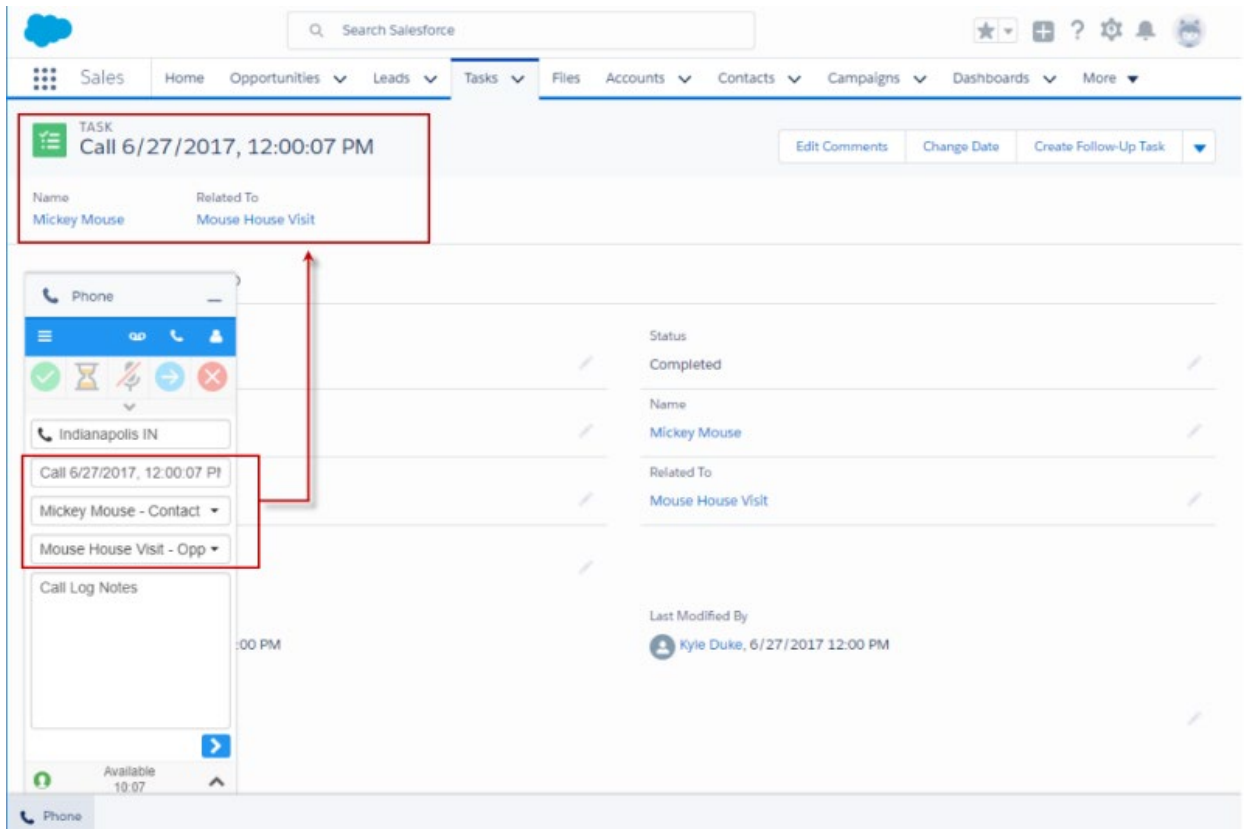
Call logs in PureConnect for Salesforce

Call logging, also known as activity logging or task logging, provides a history of interactions on a Salesforce record. Call logs are used to run reports, track first call resolution, inform employee pay, or troubleshoot issues.

Every interaction creates a call log. Salesforce creates call logs and saves them to the activity history when the call connects. Logs automatically update on page refreshes or whenever the call status or call log details change. Agents can continue to update call logs for a configurable amount of time after the call disconnects, typically 2 minutes.

Note: Salesforce activity history records include Events and Tasks. Call logs are considered Tasks. The integration does not use Events.

Call details and agent comments in Salesforce activity history



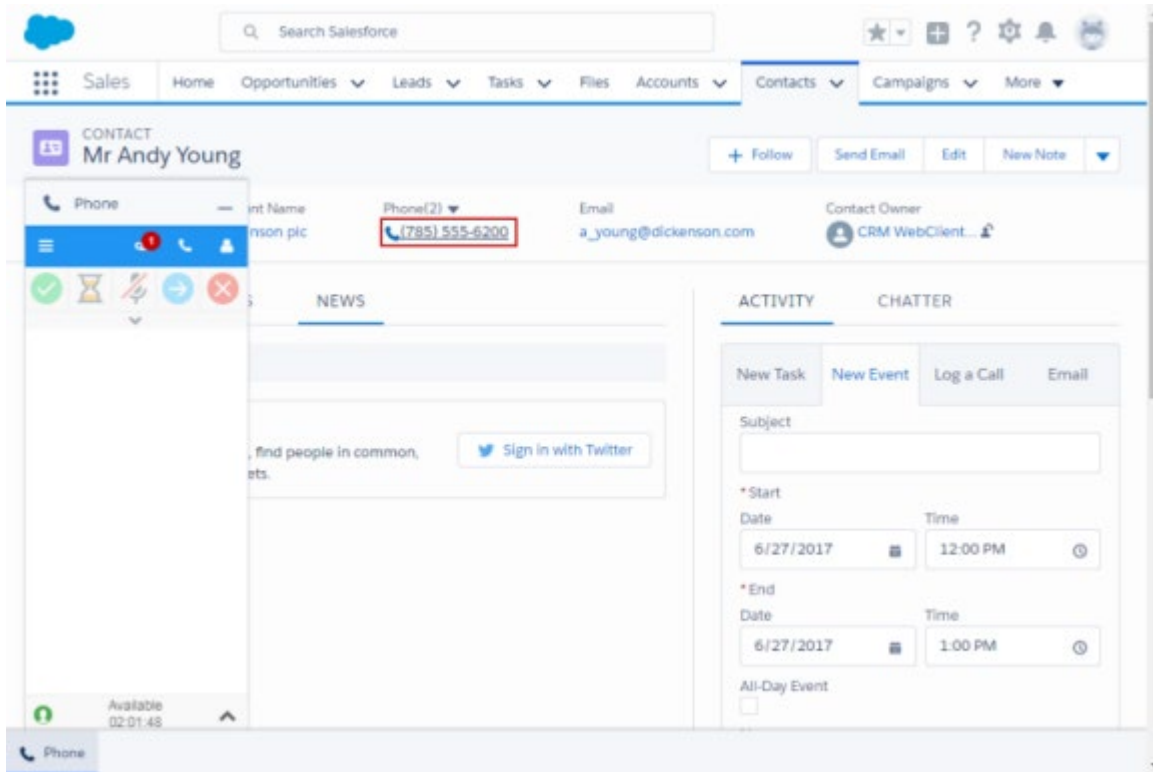
Related Topics

[View and edit call logs](#)

Click to dial in PureConnect for Salesforce

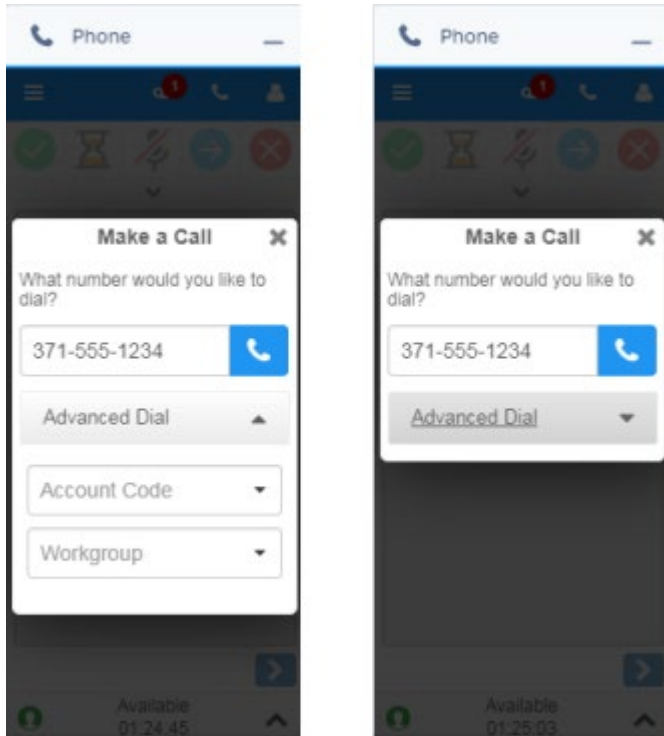
Any phone number in Salesforce displays as a click-able link that places the call immediately when clicked and auto-associates that Salesforce record (for example, contact, lead, or account) to the call log, where applicable.

If Advanced Dialing is enabled, clicking the phone number link pre-populates the dial pad. To dial the number, click the phone icon.



Note: As the call dials, the link is temporarily gray to prevent duplicate calls.

Tip: The Advanced Dialing feature enables you to associate an Account Code and Workgroup with a call. If the CIC administrator appropriately configures Advanced Dialing in Interaction Administrator, you have the option of enabling or disabling this feature in PureConnect for Salesforce on a per user basis. Expanding the Advanced Dial section of the Make a Call dialog box enables the feature; collapsing this section disables it.

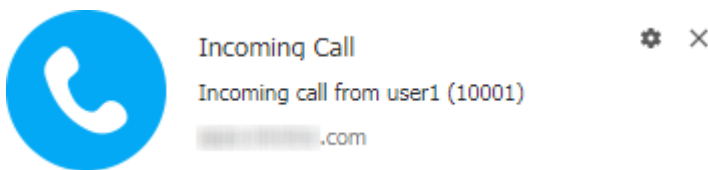


Desktop alerts

Requirement: Only for HTML5 browsers.

Desktop alerts notify you of alerting interactions **when your browser is minimized**. The alert pops up in the bottom right corner of your Windows desktop. Click the alert to bring your browser window to the top of any open applications. You can then switch to the Interactions view where you can pick up the alerting interaction.

Note: You must configure your browser to allow it to display notifications.



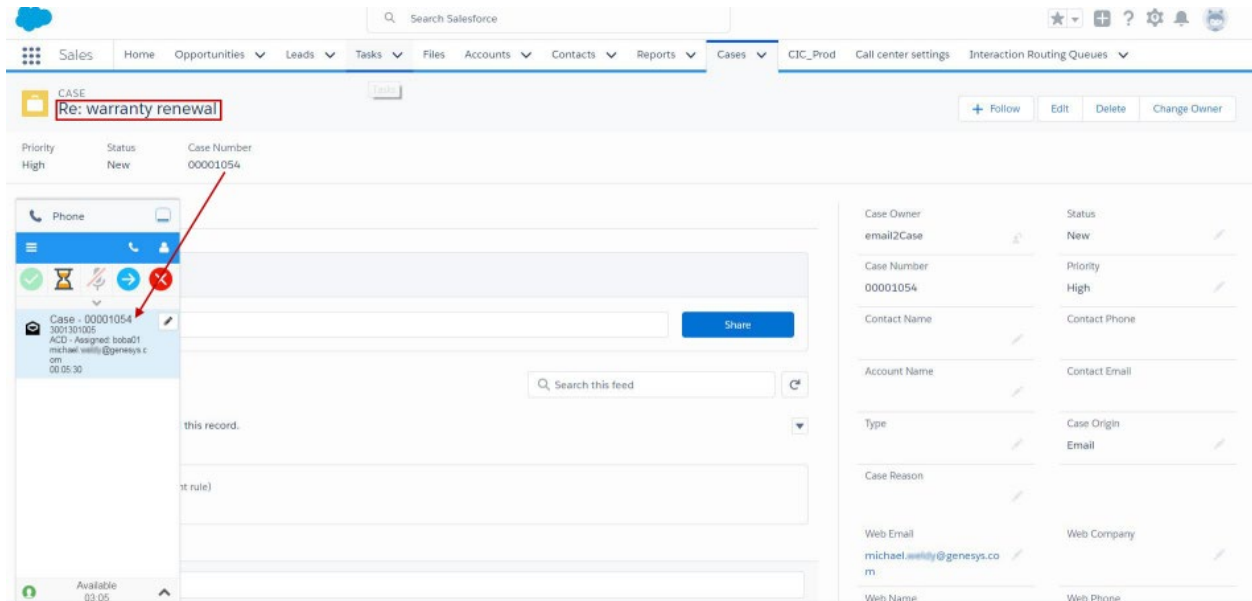
Tip: Desktop alerts do not currently work in Internet Explorer. However, if you use Internet Explorer, you can make PureConnect for Salesforce a pinned site. The browser taskbar icon then flashes when you receive an alerting interaction. For instructions on pinning a website in Internet Explorer, see [https://msdn.microsoft.com/en-us/library/gg618532\(v=vs.85\).aspx](https://msdn.microsoft.com/en-us/library/gg618532(v=vs.85).aspx).

Email-to-case in PureConnect for Salesforce

PureConnect for Salesforce supports the email-to-case feature in Salesforce using the [Salesforce Object Routing Connector](#). The Salesforce Object Routing Connector is a separate product that automatically routes emails to the appropriate queue using CIC's ACD engine. Agents cannot respond to emails within the softphone itself. They must use the Salesforce or CIC client email workflow to actually send emails. For fuller functionality, run the CIC client alongside Salesforce.

When an email interaction is routed to an agent's queue, the email screen pops the associated case record. The agent uses the email form in Salesforce to reply to the email. Once the agent replies to the email, the email interaction in PureConnect for Salesforce disconnects, if configured to do so by the Salesforce Object Routing Connector. For more information, see the [PureConnect for Salesforce Integration Administrator's Guide](#).

Note: If agents are configured to auto-answer calls, they will not get the screen pop with the associated case.



Screen pop in PureConnect for Salesforce

Screen pop functionality in Salesforce allows you to see the most relevant record in the workspace based on pre-configured behavior. By default, when an incoming call is alerting, Salesforce searches all phone number fields for the caller ID (ANI) and screen pops based on what it finds. Screen pop occurs while the call is alerting or when connecting for agents with auto-answer enabled. If Salesforce is open in multiple browser tabs or windows, the screen pop only takes place in the agent's visible tab.

You can configure screen pops to open in the same browser window (default) or a new window. The softphone layout settings in Salesforce control exact screen pop behavior. See [Designing a Custom SoftPhone Layout](#) in the Salesforce documentation for more details. See also the [PureConnect for Salesforce Integration Administrator's Guide](#).

Note: If the incoming interaction is a conference call or from an internal extension, Salesforce does not perform a screen pop.

Screen pop may include, but is not limited to, the following possibilities:

- **No match pops a new Salesforce record.**
- **Single match pops the contact or other associated record.**
- Multiple match pops a list of matching records in the search results
- **Custom call attribute pops a custom Salesforce page URL**

- **Custom call attribute pops a Salesforce search result**

Language support in PureConnect for Salesforce

The integration currently supports the following languages:

- English United States (en-US)
- Japanese (ja)
- Spanish (es)
- French (fr)

The integration determines the language preferences based on the logged-in agent's Language setting, set in Salesforce under **My Settings > Personal > Language & Time Zone**. The integration falls back to the generic language if a regional preference is not available. If the generic language is not available, it falls back to "en_us" (US English).

The integration determines the date/time format based on the browser settings on the computer.

Interaction Dialer in PureConnect for Salesforce

Get started

Customers who already have the Interaction Dialer add-on for CIC can harness the power of CIC's predictive dialer capabilities to automate sophisticated call campaigns in PureConnect for Salesforce.

For information about types of campaigns, requirements, and configuration, see the [PureConnect for Salesforce Integration Administrator's Guide](#).

Log in and out of campaigns

Agents can log in to Interaction Dialer campaigns to receive calls through PureConnect for Salesforce.

- [Log in to campaign](#)
- Log out of campaign

Agent statuses and breaks

When logged in to Interaction Dialer, agent statuses are restricted and automatically change depending on the campaign call status. To prevent disruptions to campaign calls, agents must request breaks.

- [Agent statuses](#)
- [Request a break](#)

Work with campaign calls

For each outbound call, call attributes and details from the call list record provide basic information about the contact. The integration can concurrently look up the contact in Salesforce and display the appropriate record to the agent. At the end of each call, the agent must select a call outcome (disposition) before taking another call.

- [Place an outbound call](#)
- [Schedule a callback](#)
- [End a call](#)

Getting Started

Log in to PureConnect for Salesforce

Log in to PureConnect for Salesforce through Salesforce. If your CIC administrator has not enabled single sign-on, log in with your User ID and Password configured in Interaction Administrator. For fuller functionality, log in to and run the CIC client as a side-by-side application.

Log in to PureConnect for Salesforce only

Prerequisite: Ensure that you are in an online status. You cannot select a station when in an offline status.

1. Input your CIC **Server Name**, if needed.

Note: Typically the call center definition defines this value, so the server name field is hidden. For more information about call centers, see the [PureConnect for Salesforce Integration Administrator's Guide](#).

2. Input your CIC **User ID** and **Password**.
3. Click **Log In**.
4. Select your station (Workstation, Remote Workstation, or Remote Number).

If you are already logged in to a station, this step doesn't display.

5. Input the name of the **Workstation** or **Remote Workstation**, or input the **Remote Number**.

Stations already associated with other users are not available.

- **Workstation:** Use a computer and a telephone connected by a telecom outlet (SIP or analog phone) to CIC.
 - **Remote Workstation:** Work from a "known" single remote location, a configured Remote Station, using a single phone number for all calls to the agent's extension.
 - **Remote Number:** Work from an ad-hoc remote location, a dynamic remote client connection, using a single phone number for all calls to the agent's extension.
6. For Remote Number stations only, select **Persistent** to keep the remote telephone connected until you log out.

This option displays only if your CIC user has the Persistent Connections security right.

7. Select **Remember Station** to auto-log in to this station when this agent logs in. This setting can be cleared when [changing stations](#).
8. Click **Select**.

Log in to both PureConnect for Salesforce and CIC client

Log in to PureConnect for Salesforce and the CIC client in any order. If you log in to the CIC client first, then log in to PureConnect for Salesforce as the same agent, you will not be asked to select a station. The CIC client syncs the station information to PureConnect for Salesforce.

If your CIC administrator has not enabled SSO and you do not have a CIC server switchover pair, log in to the CIC client before logging on to PureConnect for Salesforce. Otherwise PureConnect for Salesforce kicks you off, and you must reenter your password.

Related Topics

[Troubleshoot connection issues](#)

Log in with a Web-based phone

Requirements: Your administrator must enable this feature and set it up for you. For more information, see [Web-based phone](#).

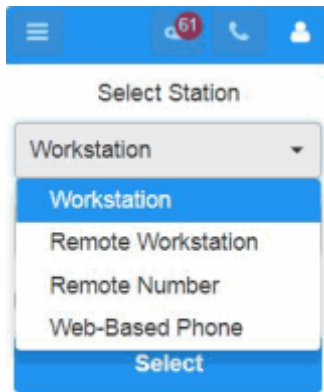
Log in to PureConnect for Salesforce through Salesforce. If your CIC administrator has not enabled single sign-on, log in with your User ID and Password configured in Interaction Administrator. For fuller functionality, log in to and run the CIC client as a side-by-side application.

Prerequisite: Ensure that you are in an online status. You cannot select a station when in an offline status.

1. Input your CIC **Server Name**, if needed.

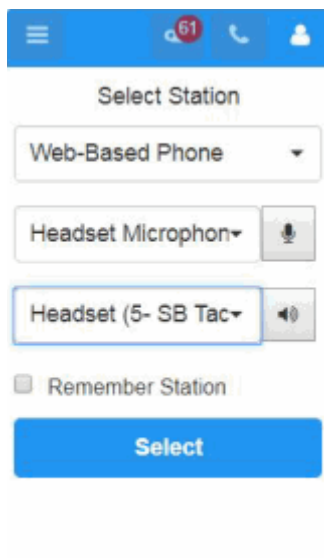
Note: Typically the call center definition defines this value, so the server name field is hidden. For more information about call centers, see the [PureConnect for Salesforce Integration Administrator's Guide](#).

2. If your administrator enables the Single Sign On feature, you can select which credentials to using to log in. Do one of the following:
 - Select **Interaction Center Authentication** and enter your CIC **User ID** and **Password**.
 - Select **Windows Authentication** and enter your Windows domain User ID and Password.
 - Select any other certified Identify Provider designated by your administrator and follow your administrator's instructions for entering your credentials.
3. Click **Log On**.
4. From the **Select Station** drop-down list, select **Web-Based Phone**.



5. If needed, select your **Microphone** and **Speaker**.

Note: Your selections are saved from the last time you used the **Web-Based Phone** as your station.



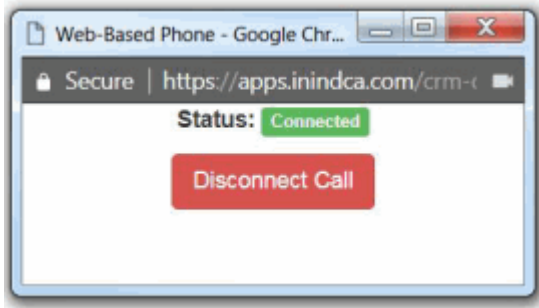
6. To test the microphone, click the **Test Microphone** icon next to your selection. Speak in your normal tone of voice.

Result: A progress bar appears. Green indicates a comfortable volume for your listener. Yellow indicates the volume is too loud. A blank progress bar indicates a failed test.

Click the **Stop** button (black square) when you complete the test.

7. To test your Speaker selection, click the **Test Speakers** icon next to your selection. Adjust the volume in the usual way for your speakers or headset.
8. Select **Remember Station** to auto-log in to this station when this agent logs in. This setting can be cleared when [changing stations](#).
9. Click **Select**.

Result: The Web-Based Phone dialog box appears.



Note: Use the Web-Based Phone dialog box to monitor the connection status of your WebRTC phone. Use the PureConnect for Salesforce menus and call controls to perform standard call control operations such as making, picking up, transferring or disconnecting calls. However, you can use the **Disconnect Call** button in the Web-Based Phone dialog box to disconnect a call. This is similar to hanging up a physical phone to end a call. This additional method of disconnecting a call is useful if PureConnect for Salesforce becomes unavailable during a switchover.

Log in to PureConnect for Salesforce using SSO

Log in to PureConnect for Salesforce through Salesforce. If your CIC administrator has enabled SSO, select the authentication type upon login. For fuller functionality, log in to and run a CIC client as a side-by-side application.

Log in to PureConnect for Salesforce only

Prerequisite: Ensure that you are in an online status. You cannot select a station when in an offline status.

1. Input your **CIC Server Name**, if needed.

Note: Typically the call center definition defines this value, so the server name field is hidden. For more information, see the [PureConnect for Salesforce Integration Administrator's Guide](#).

2. Click **Select Server**.
3. Select your authentication type.
4. To skip this step on future logons, select **Always use this authentication type** before logon.

Note: CIC authentication always requires agents to enter credentials, even when using SSO.

5. Input your **CIC User ID** and **Password**.
 - a. For CIC, enter your **CIC User ID** and **Password** as configured in Interaction Administrator.
 - b. For Windows Authentication, enter your Windows **User Name** and **Password**.

Note: This dialog box does not appear if your CIC administrator configures your browser to enable Windows credentials to automatically pass to the CIC server.

- c. If available, enter the username and password for a different SSO identity provider. Follow your CIC administrator's instructions for entering credentials and logging on.
6. Click **Log In**.
 7. Select your station (Workstation, Remote Workstation, or Remote Number).

If you are already logged in to a station, this step doesn't display.

8. Input the name of the **Workstation** or **Remote Workstation**, or input the **Remote Number**.

Stations already associated with other users are not available.

- **Workstation:** Use a computer and a telephone connected by a telecom outlet (SIP or analog phone) to CIC.
 - **Remote Workstation:** Work from a "known" single remote location, a configured Remote Station, using a single phone number for all calls to the agent's extension.
 - **Remote Number:** Work from an ad-hoc remote location, a dynamic remote client connection, using a single phone number for all calls to the agent's extension.
9. For Remote Number stations only, select **Persistent** to keep the remote telephone connected until you log out.

This option displays only if your CIC user has the Persistent Connections security right.

10. Select **Remember Station** to auto-log in to this station when this agent logs in. This setting can be cleared when [changing stations](#).
11. Click **Select**.

Log in to both PureConnect for Salesforce and CIC client

Log in to PureConnect for Salesforce and the CIC client in any order. If you log in to the CIC client first, then log in to PureConnect for Salesforce as the same agent, you will not be asked to select a station. The CIC client syncs the station information to PureConnect for Salesforce.

If your CIC administrator has not enabled SSO and you do not have a CIC server switchover pair, log in to the CIC client before logging on to PureConnect for Salesforce. Otherwise PureConnect for Salesforce kicks you off, and you must reenter your password.

Related Topics

[Troubleshoot connection issues](#)

Log in to a secure system

Your PureConnect for Salesforce administrator may require you to agree to some conditions before you can log in.

In a secure system, a User Agreement similar to this one appears. Click **Accept** to complete the login process.

User Agreement

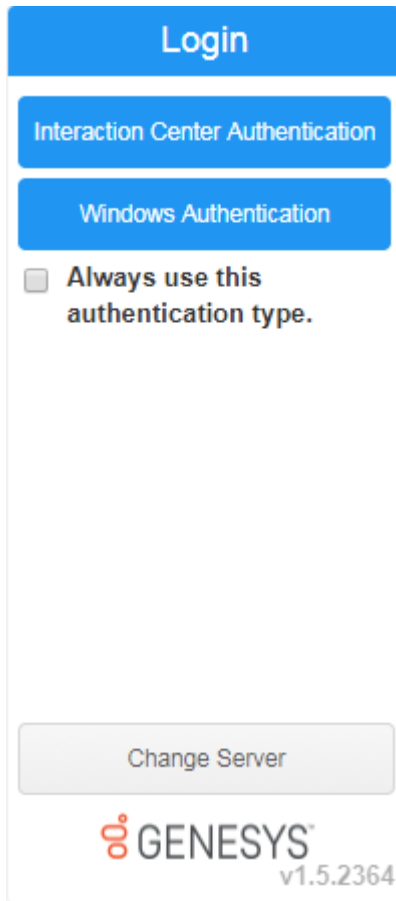
By using this Interaction Center system you agree to the following conditions:

- 1) You will consider the employee code of conduct during all interactions.
- 2) You will not use this system for any non-business related interactions.
- 3) You permit the company to record any and all interactions for quality and training purposes.

Single sign-on

Single sign-on (SSO) enables you to log in to PureConnect for Salesforce using credentials other than your CIC user name and password. These credentials can be certified by any Identity Provider designated by your CIC administrator. Typically, you log in to your workstation, a network domain, or some other secure system before you log in to PureConnect for Salesforce. The same user ID and password from your initial login can then be used to log you in to PureConnect for Salesforce automatically—without prompting you to enter the credentials again.

Note to Internet Explorer users: Add a custom reverse proxy route. Internet Explorer does not currently support SSO with CaaS. For more information, see *SSO support in Internet Explorer* in the [PureConnect for Salesforce Integration Administrator's Guide](#).



Login

Interaction Center Authentication

Windows Authentication

Always use this authentication type.

Change Server

GENESYS[™]
v1.5.2364

Change your password in PureConnect for Salesforce

If your password has expired, PureConnect for Salesforce prompts you to change your password the next time you log in. Change your password immediately to log on and continue loading PureConnect for Salesforce.

Note: You must have a valid Customer Interaction Center user ID and password to use PureConnect for Salesforce. This is required even if you use your Windows ID and password or other acceptable credentials to log in to PureConnect for Salesforce.

Password Policies

Your CIC administrator creates Password Policies in Interaction Administrator. The password policy that is assigned to you controls how often you must change your CIC password. It also determines minimum password length, how many unique characters are required, whether sequential digits are allowed, how often you can reuse a password and other password restrictions.

If your password is going to expire soon, a prompt appears periodically (usually once per day or on the next logon) asking if you want to change your password now. If you select **Yes**, then the **Change Password** dialog box appears.

Note: You must have a valid CIC user ID and password to use the CIC client. This is required even if you use your Windows ID and password or other acceptable credentials to log on to the CIC client. For more information, see [Single Sign On](#).

Tip: You do not need to wait until you are prompted to change your password. You can change your password at any time.

1. From the menu, select **Change Password**.
2. In the Change Password dialog box, do the following:
 - a. In Old Password, enter your current CIC password.
 - b. In New Password, enter your new CIC password.
 - c. In Confirm New Password, type your new password again.

3. Click **Change Password**.

Troubleshoot connections errors

Description of error	Cause	Resolution
You are kicked out of PureConnect for Salesforce and returned to the login page, you see this error: "Your connection to the server was lost. Please try again."	Lost network connection	Check the Internet connection on your computer or reset your router. Contact your IP provider or IT department if you are still experiencing network issues.
	Slow network or proxy	If your network connection or your proxy is too slow, the connection might time out and log you out of the application.
	Server switchover occurred	If using the default IC login (not SSO), you are logged out whenever a server switchover occurs. Log in again to start a new session.
	Side-by-side login to CIC client without running a second CIC server	If you log in to the CIC client <i>after</i> selecting a station in PureConnect for Salesforce, PureConnect for Salesforce kicks you off, and you must reenter your password. To avoid

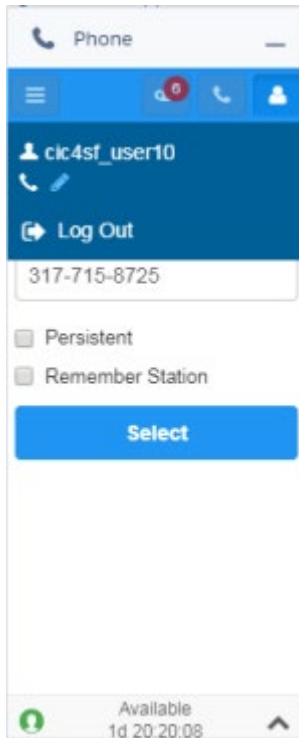
		this problem in the future, configure a second CIC server in the call center definition for switchover. Or, log in to the CIC client first.
Session expired due to inactivity	If you navigate away from PureConnect for Salesforce for an amount of time that exceeds the timeout on the CIC server, you will be logged out. Log in again to start a new session.	If this happens frequently, contact your CIC administrator to increase the server timeout.
You cannot log in at all, and you see this error: "Unable to retrieve single sign on settings."	SSO is disabled in CIC	Ask your CIC system administrator to enable SSO, even if you only have one identity provider.
Credential pop-up is not displaying	Pop-ups are blocked in your browser	Enable pop-ups in your browser to always be allowed for this site.
	You are on an unsupported version of CIC	Ensure that you are running the latest patch of CIC 2015 R2 or later release.
After entering credentials, the authentication pop-up goes blank and never logs you in.	Reverse proxy domain is different from CIC domain	Add a custom reverse proxy route to your web proxy. See the CIC Web Applications Installation and Configuration Guide for full details on setting up the web proxy.
You see a blank login screen with no login options.	SSO identity providers are not enabled in CIC	In Interaction Administrator, go to System Configuration > Configuration > Connection Security tab > Configure logon authentication link. Enable Allow single sign-in authentication . For Windows authentication, enable Allow manual entry of Windows authentication credentials . For CIC authentication, enable Allow IC authentication .

Change station

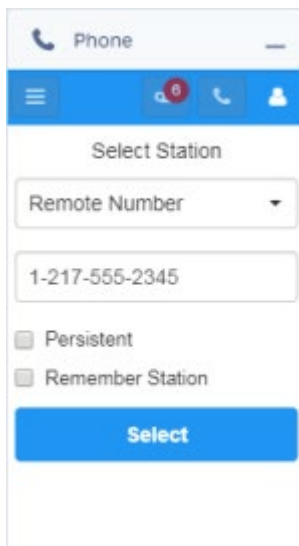
PureConnect for Salesforce uses the same stations as the CIC clients. You can only change stations in PureConnect for Salesforce when it is running on its own. As soon as you open a side-by-side CIC client, the option to change stations is only available in the CIC client. When you log in to the CIC client before PureConnect for Salesforce, the station is synced across both applications. When you change stations in the CIC client, your station automatically updates in PureConnect for Salesforce.

To change your station in PureConnect for Salesforce:

1. Click the Profile icon in the upper-right corner.



2. Click the **Change Station** (pencil) icon.



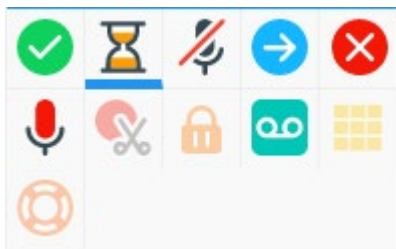
PureConnect for Salesforce

3. In the Select Station dialog box, select the type of station and supply any other needed information. For more information, see [Log in](#) or [Log in with a Web-based phone](#). Stations already associated with other users are not available.
4. Select **Remember Station** to auto-log in to this station when this agent logs in.
5. To proceed with the selected station, click **Select**.

Calls

Call controls in PureConnect for Salesforce

PureConnect for Salesforce provides an abbreviated set of the call controls available in the CIC client. The appearance of the call control icons varies depending on the selected interaction's current state and the agent's permissions. The arrow below the call controls expands to reveal more options.

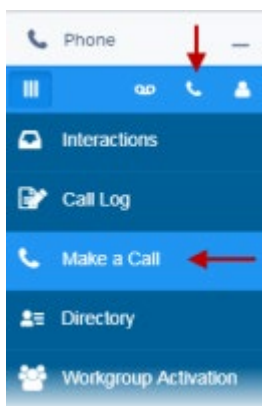


- Available call controls are brightly colored.
- Unavailable call controls are dim.
- Currently selected call controls are marked with a blue bar.

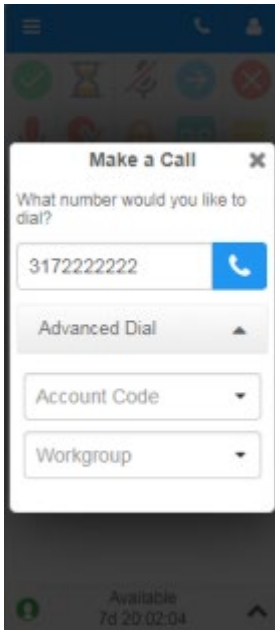
Make a call

In Salesforce, any phone number that is a click-able link places the call immediately when clicked. If the number you are calling is not already associated with a record in Salesforce, use the softphone's dial pad.





1. Do one of the following:
 - From the menu, select **Make a Call**.
 - In any view, click the **Make a call** button.



2. In the **Make a Call** dialog box, type the number to call, then click the phone icon.



Call controls

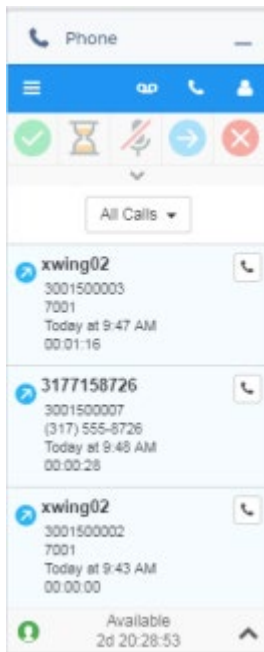
Icon	Call control
	Pick up an interaction.
	Place an interaction on hold. Click again to resume the interaction.
	Mute an interaction. Click again to unmute the interaction.
	Transfer an interaction to an agent, outside number, workgroup, or Attendant profile.

	<p>End an interaction. After disconnecting, the interaction is still visible but sits in a deallocated state for a configurable amount of time, typically 2 minutes. Agents can assign a wrap-up code or finish updating the call log.</p>
	<p>Make an Ad Hoc recording of a call. Click again to stop the recording. Access call recordings from CIC.</p>
	<p>Make a Snippet recording of a call. Click again to stop the recording. Interaction Recorder manages these Snippet recordings and stores them in the CIC database.</p> <p>For more information about the difference between Ad hoc and Snippet recordings, see Recording types.</p>
	<p>Secure pause a recording to avoid recording sensitive information.</p>
	<p>Send an incoming call to your voicemail; or send a connected call to your voicemail.</p>
	<p>Open the dial pad while on a call to send DTMF tones to the connected call, make IVR selections, or enter information such as an account number or credit card number.</p> <p>DTMF (dual-tone multi-frequency): DTMF is the signal generated when a caller presses a telephone key to make IVR selections or to enter information such as an account number or credit card number.</p>
	<p>Click the Request Assistance button to chat with your workgroup supervisor.</p>
<p>n/a</p>	<p>Make a conference call. Start a conference by dragging one call on to another.</p>

Call history in PureConnect for Salesforce

The Call History view displays information about your recent incoming and outgoing calls, including the name and phone number of the other party, the day and time of the call and its duration.

You display all your calls or filter the list by missed, outgoing, answered, or forwarded calls.



Make a call in PureConnect for Salesforce

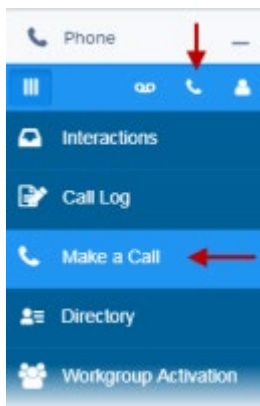
You can make a call by doing one of the following:

- Click the **Make a Call** button available on all views.

or

- Select **Make a Call** from the menu.

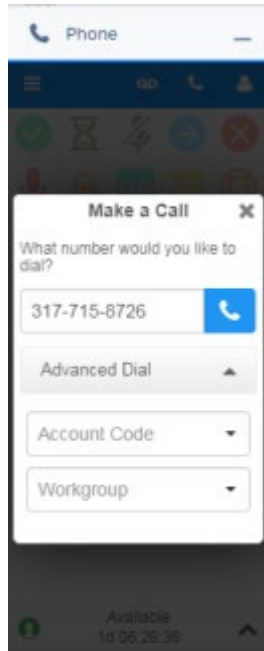
Then type the phone number on your computer keyboard.



- Dial the phone number on your telephone.
- Click a phone number link on any Salesforce record. The Salesforce record (for example, contact, lead, or account) auto-associates to the call log, where applicable.
- Click the phone icon next to a name in the directory.
- Double-click a disconnected interaction to re-dial the number.

Manually dialed numbers or calls that require advanced dial options display the **Dial Number** field.

1. Type the number to dial.
2. If necessary, designate an account code and/or a workgroup for the outgoing call:
 - a. Expand the **Advanced Dial** options.



- b. Select the appropriate **Account Code**.

If Account Codes are enabled in Interaction Administrator and the Advanced Dial options are open, an account code is required. Your administrator can create a dummy account code for situations where a real account code does not apply; for example, a personal call.

- c. Select the appropriate **Workgroup**.

Only the names of the ACD workgroups in which you are currently active display. Leave this blank for calls not made on behalf of a workgroup.

Tip: See [Change your workgroup activation status](#).

3. Click the phone icon or press **Enter** on your keyboard.

More information about Advanced Dial options

Advanced dialing enables you to assign an account code and designate a workgroup for outgoing calls. Primarily used for administrative and reporting purposes, this feature enables the call to count toward an agent's and the workgroup's statistics.

Note: See [Advanced Dialing Options](#) in the CIC Documentation Library for more details.

Configuration requirements

Your CIC administrator must enable certain advanced dialing options in Interaction Administrator before they are available to you. Your administrator configures the following:

- Configures and enables Account Codes.
- Grants you access to all or some of the configured Account Codes.
- Assigns you to at least one ACD workgroup.

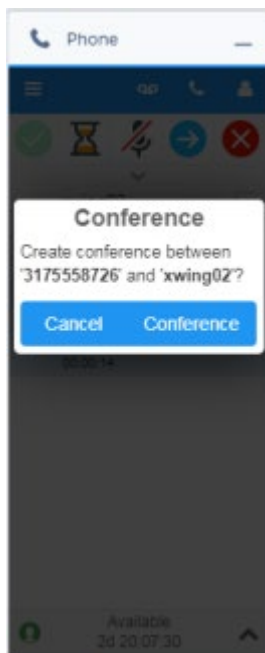
Make a conference call in PureConnect for Salesforce

You can create immediate conference calls by merging active calls together. While on a conference call, you can mute yourself, place the other participants on hold, or disconnect from the conference.

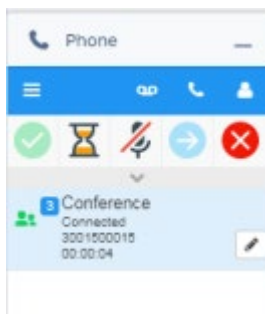
As long as more than one party remains in the conference, the conference call persists even when the person who started the call leaves. When one party remains, the conference ends.

Prerequisite: To create a conference, you must have more than one active call.

1. In the interactions view, click and drag one call onto another call.



2. Click **Conference**.



A Conference interaction shows in the view, with the number of connected participants.

3. To [view the call log](#), click the pencil on the conference interaction.

Note: Call logs for the original calls are in Salesforce under **Reports > Call Center Reports**. CIC logic determines if an existing call log becomes the conference call log or if a new call log is created for the conference.

4. To leave the conference, click **Disconnect**. The call is still active for the other participants.
5. To add another caller, click and drag another active call onto the conference.

Transfer an interaction in PureConnect for Salesforce

There are two ways to transfer an interaction:

- **Blind transfer** is transferring without speaking to the intended recipient.

You must use a Blind transfer to transfer an interaction to a **workgroup** or **Attendant profile**.

Requirements: In order to transfer a call to an Attendant profile, you need the **Search** Access Control right for that profile. Also, you can transfer calls only to Attendant profiles configured in Interaction Attendant to allow calls to be transferred to them.

- **Consult transfer** is transferring after speaking to the intended recipient.

Use Consult transfer only for **call** interaction types.

Warning: Perform a consult transfer only when you need to speak with both parties before completing the transfer. If this is not necessary, perform a blind transfer. **Do not use a consult transfer** to transfer a call to an Attendant profile, workgroup queue, or to an agent's voicemail. These are not supported features and may result in the original call being sent to the default attendant profile.

Note: You cannot transfer a call directly to another agent's voicemail in the PureConnect for Salesforce integration.

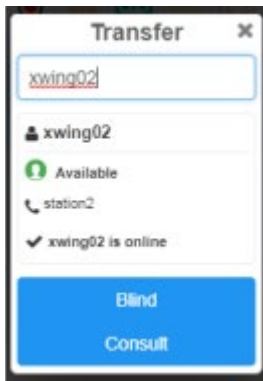
Blind transfer an interaction

1. When an interaction is in progress, click **Transfer**.



2. Select the transfer recipient by typing the name or number of a person or workgroup or the Attendant profile name.

Matching names and workgroups from your CIC directory auto-display for selection as you type. You can see the status and other relevant statistics. A phone icon indicates the agent is on a call.



3. Click **Blind**.

The call briefly displays in the interaction list until it connects. Once connected, the transfer completes and both interactions drop off the list.

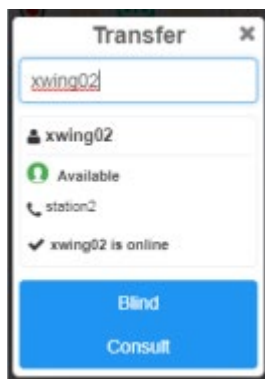
Consult transfer a call

1. When a call is in progress, click **Transfer**.

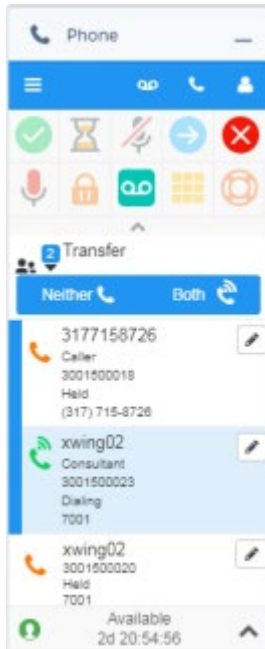


2. Select the transfer recipient by typing the name or number of a person.

Matching names from your CIC directory auto-display for selection as you type. You can see the status and other relevant statistics. A phone icon indicates the agent is on a call.



3. Click **Consult**.



The original caller goes on hold.

4. Do one of the following:
 - If the consultant answers and agrees to the transfer, click the **Transfer** icon again and then **Complete**.
 - If the consultant does not answer or does not agree to the transfer, click **Disconnect**. Only the consultant is disconnected.
 - If further consulting between all three participants is necessary before transferring, click **Both**.
 - To place both participants on hold, click **Neither**.

Pick up an interaction in PureConnect for Salesforce

PureConnect for Salesforce can receive calls from individual numbers, ACD, and conference calls. It can also receive web chats and emails distributed by CIC. When an interaction comes on your queue, the softphone rings and the pickup call control and alert bar across the bottom both activate. Depending on your configuration, PureConnect for Salesforce attempts to perform a screen pop.

Note: Any special interaction handling rules configured by your administrator apply to PureConnect for Salesforce as well, such as auto-answering and displaying alerts.

There are a number of ways to pick up or handle an incoming interaction.

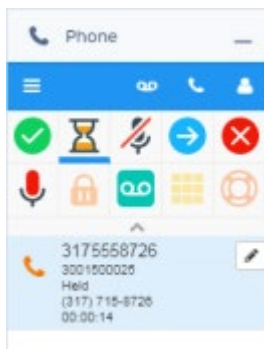
- If you are not connected to another call, pick up your telephone handset.
- Click **Pickup** on the call control.
- Click **Pickup** on the incoming alert bar.

- If you dismiss the alert bar, you can still pick up the interaction using the call control.
- Double-click the interaction.
- Click **Disconnect** to decline the interaction without answering.
- Declined interactions reenter the queue.
- Click **Hold** to pick up and place the interaction on hold immediately.

Place an interaction on hold in PureConnect for Salesforce

You can place a connected interaction on hold. If you are already on a call, picking up an incoming call automatically places the currently connected call on hold.

Note: Special hold rules configured by your administrator apply to PureConnect for Salesforce as well, such as playing hold music or automatically disconnecting after a certain time on hold.



1. When an interaction is alerting, click **Hold**.
Both the call control and the interaction view indicate the held state.
2. When you are ready to resume the interaction, click **Hold** again or click **Pickup**.
3. Click **Disconnect** to end an on-hold interaction.

Record a call

Requirements: This feature may or may not be available to you, depending on the licenses and rights assigned to you in Interaction Administrator. Two types of recordings are available in PureConnect for Salesforce. For the **Record** button, see the [Requirements for Ad hoc recordings](#). For the **Snip** button, see [Requirements for Snippet recordings](#).

Warning: Genesys disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record, Snip, or Listen capabilities of CIC software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.

With the appropriate license and rights, you can record a call. You can make two types of recordings: **Ad hoc** and **Snippet**. Use the **Record** button to create an Ad hoc recording or the **Snip** button to create a Snippet recording. For more information about the differences between these types of recordings, see [Recording Types](#).

Tip: You can make either an Ad hoc or a Snippet recording of an interaction. You cannot make both types of recordings of the same interaction. For more information, see [Snippet Recording Precedence](#).

After the recording ends, CIC stores all parts of the recorded call. Snippet recordings are stored in the CIC database and are available only to Interaction Recorder users - usually administrators and supervisors. Ad hoc recordings made using the Record button are stored in files that your CIC administrator can arrange for you to receive in your email inbox as WAV files attached to email messages.

Note: The following procedure assumes that you are currently connected to a call.

To record a call:

1. Select an interaction and click **Record** or **Snip**.

A blue bar appears below the button and the recording starts.

2. To secure pause an Ad hoc recording, click **Secure Pause**.

A blue bar appears below the Secure Pause button and recording is suspended.

Note: Secure Pause is not available if you are making a Snippet recording. For Ad hoc recordings, this pause affects only your recording of the interaction. Recordings made by other monitors of this interaction are not affected. For more information, see [Securely Pause a Recording](#).

3. To stop recording, click **Record** or **Snip** again.

The blue bar below the Record or Snip button disappears and recording stops.

Note: You can press the Record or Snip button more than once to stop or continue recording your call, making separate recordings of selected parts of the call.

Recording Types

With the appropriate license and rights, you can make two types of recordings. Both the **Record** and **Snip** buttons enable you to record all or selected parts of a call.

Ad hoc recordings

Use the **Record** button to create Media Server-based WAV files for call recordings. These recordings are not stored as part of the CIC database. Your CIC administrator manages the storage of Ad hoc recordings.

The CIC administrator can arrange for you to receive these recordings as email message attachments. You can use Interaction Voicemail Player or a third-party application to play back call recordings.

Requirements for Ad hoc recordings:

The **Record Interactions** Security right enables you to make an Ad hoc recording of a call.

Snippet recordings

Use the **Snip** button to make recordings that are stored in the CIC database. Snip creates SASF (Secure Authenticated Stream Format) files. Snippet recordings store not only the interaction recording but also participant and event data. Snippet recordings can be encrypted.

CIC administrators and supervisors use Interaction Recorder to configure and manage snippet recordings. Authorized ICBM users can use the Interaction Recorder module to search for and play back snippet recordings. These authorized users can also associate tags, attributes, and Quality Management questionnaires with snippet recordings. In addition, supervisors with the appropriate rights can create snippet recordings in the ICBM Interaction Supervisor Queues and Agent or Workgroup Queue views. Interaction Recorder Retention policies determine where and for how long CIC retains snippet recordings. Interaction Recorder Security Policies control access to these snippet recordings within Interaction Center Business Manager (ICBM).

Requirements for Snippet recordings:

Your CIC administrator must configure Interaction Recorder to **Enable Snippet Recordings**. This administrator must also assign a **Recorder Access** license to you or the station you are using. The **Snip Interactions** Security right enables you to make a snippet recording of a call.

Snippet Recording Precedence

If you try to create both an ad-hoc recording and a snippet recording of the same call, the snippet recording takes precedence.

If you start an ad hoc recording first and then start a snippet recording, the ad-hoc recording merges into the snippet recording. Interaction Recorder server manages the resulting snippet recording. This snippet recording contains all the recorded data, from the beginning of the ad-hoc recording to when the snippet recording stops or the parent interaction is disconnected. You can use either the Record or Snip button stop this recording

However if you or another user start a snippet recording first, you cannot start an ad hoc recording of the same interaction. The Record button is unavailable.

Warning: Genesys disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record, Snip, or Listen capabilities of CIC software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.

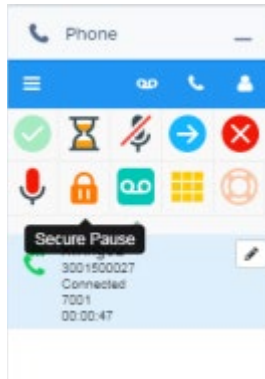
Securely pause a recording in PureConnect for Salesforce

While connected to a call, use a secure pause to avoid recording sensitive information, such as a Social Security number or credit card number. You do not have to manually record the call to initiate a secure pause.

Note: Secure Pause is not available if you are making a Snippet recording. For Ad hoc recordings, this pause affects only your recording of the interaction. Recordings made by other monitors of this interaction are not affected.

1. When connected to a call, expand the call control tray and click the secure pause icon.

The length of the secure pause is configured in CIC by your administrator. The countdown timer remains visible on all screens inside the softphone.



2. Click the icon again to reset the length of the secure pause to its maximum duration. After clicking the icon, the timer take 1-2 seconds to reset.
3. The secure pause ends once the timer runs out.

Note: You cannot cancel a secure pause once it has started or extend the secure pause beyond the maximum time limit configured by your CIC administrator.

View and edit call logs in PureConnect for Salesforce

Every connected interaction creates a call log. The call log is created and saved to the activity history in Salesforce when the call connects. It automatically updates when the page refreshes or whenever the call status or call log details change.

You can view and edit call logs for interactions that are currently active or recently disconnected from one of two places.

Interactions menu

1. Click **Menu > Interactions**.
2. To view the call log, click the pencil on an interaction.

Call log menu

1. Click **Menu > Call Log**.
If only one interaction is active, the call log displays.
2. To view the call log, select an interaction.

Call log details

This table includes a list of data captured with each interaction and how to find that data during or after the interaction ends. Some fields are set on the call log itself, others only show up as Salesforce activity fields. Some of the fields can be modified during or after the interaction by an agent, others auto-populate and cannot be modified. Some fields may not be visible in Salesforce, depending on your Salesforce settings.

If the agent navigates to a different Salesforce record while the call is live, that record is dynamically selected for the Name or Related To fields. To use this feature, the PureConnect for Salesforce administrator selects Auto Association on Navigation in the call center settings. For more information on call center settings for Salesforce, see the [PureConnect for Salesforce Integration Administrator's Guide](#).

Field	Where is the field set?	Description	Can agent modify?
Call Duration	Salesforce activity	Total duration of the call in seconds, from the time of connection to disconnection or transfer.	No
Call Object Identifier	Salesforce activity	Call ID key assigned to the interaction.	No
Call Result	Wrap-up form and Salesforce activity	Wrap-up code assigned after the call is disconnected.	Yes
Call Type	Salesforce activity	Indicates the call direction, either Inbound, Outbound, or Internal. All calls placed to or received from an extension on the same server as the agent are considered internal.	No
Comments	Call log and Salesforce activity	Empty field for any notes taken during the interaction.	Yes
Interaction	Call log only	Displays the caller ID.	No
Name	Call log and Salesforce activity	Displays the name from the Salesforce record that pops when the interaction connects or from which a click-to-dial call was made, such as a contact, lead, or person account. If multiple records match, the matches appear in a drop-down list. If the agent navigates to a different contact, lead, or person account record while the call is live, that record dynamically adds to the drop-down list.	No
Related To	Call log and Salesforce activity	Displays an associated record from the Salesforce record that pops when the interaction connects or from which a click-to-dial call was made, such as an account or opportunity. If multiple records match, the matches appear in a drop-down list. If the agent navigates to a different account, opportunity, campaign, case, or custom object record while the call is live,	No

		that record dynamically adds to the drop-down list. Note: To ensure call logs can be saved for custom objects, select Allow Activities when creating the custom object in Salesforce.	
Subject	Call log and Salesforce activity	Displays the interaction type plus a date and time stamp. The date/time is formatted based on the browser's locale settings. Example: Call 8/10/2015, 8:55:17 AM	Yes

Wrap up a call in PureConnect for Salesforce

Agents specify wrap-up codes to indicate the nature of an interaction, for example, a completed sale, a customer dissatisfied with service, or a billing problem. If wrap-up codes are configured and active for the workgroup the call came through, the wrap-up form displays once the call is disconnected.



1. Select the appropriate wrap-up code within the time allowed.
2. Click **Assign**.

If you don't select a wrap-up code in time, the Wrap Up form goes away and an ambiguous code is assigned to the call.

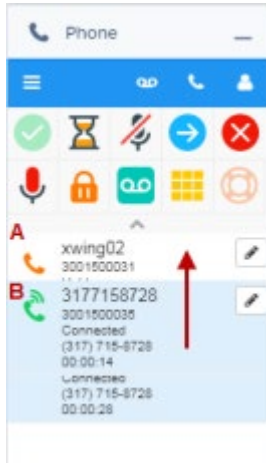
Wrap up a conference call in PureConnect for Salesforce

For conference calls, wrap-ups work the same as they do in Interaction Desktop with one exception: when the wrap-up prompt occurs is different.

PureConnect for Salesforce

In the integration, when you drag and drop interactions to create a conference, the interaction that is underneath the other interaction is that one that you receive a wrap-up prompt for. In the example below, you receive a wrap-up prompt for interaction A.

The opposite is true for Interaction Desktop.



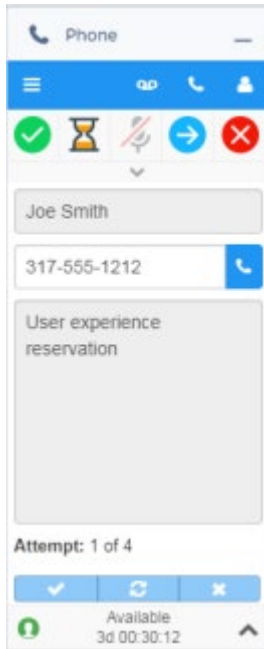
Callbacks

About callbacks in PureConnect for Salesforce

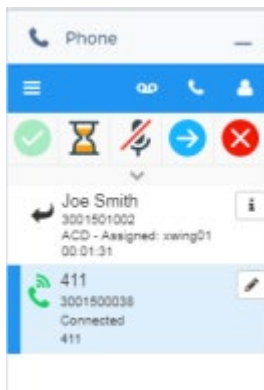
PureConnect for Salesforce supports callback interactions, which are requests from callers to have their calls returned. When a callback interaction is routed to an agent's queue, the agent picks it up like any other interaction. Once connected, the callback sits on the interaction view until the agent is ready to call the customer.

Note: CIC 2015 R4 is the minimum supported version for callbacks.

Click the phone icon when ready to place the call. Use the buttons below the callback form to retry the call or to indicate whether or not the call was successful



Callback interactions display the active call beneath the callback interaction type.



See [Respond to callbacks](#) for step-by-step instructions on working with callbacks.

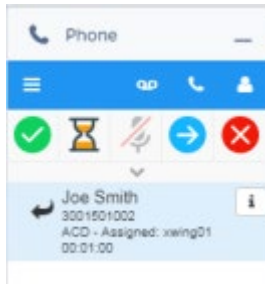
Respond to callbacks in PureConnect for Salesforce

PureConnect for Salesforce supports callback interactions, which are requests from callers to have their calls returned. When a callback interaction is routed to an agent's queue, the agent picks it up like any other interaction. Once connected, the callback sits on the interaction view until the agent is ready to call the customer.

Note: CIC 2015 R4 is the minimum supported version for callbacks.

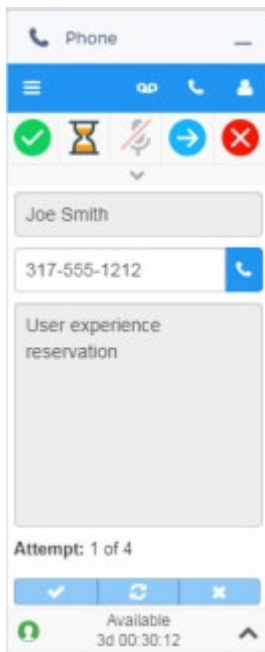
1. Pick up the callback interaction as it is alerting.

The callback sits on your queue until you are ready to call the customer.



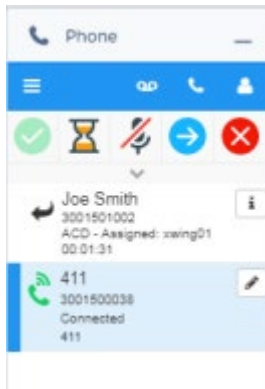
2. Click the information icon.

The customer-provided callback details display. The buttons below the form are disabled until after you attempt the first callback.



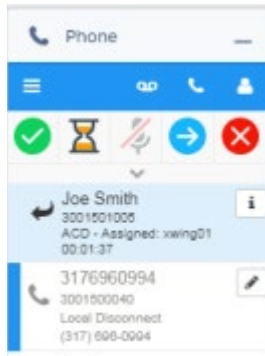
3. When ready to place the call, click the phone.

The call displays in the interaction view beneath the callback interaction.



4. Click the callback interaction to access call controls for an active call.

- After the call completes, the callback interaction remains active to allow for retries in case the customer did not answer.



- Click the information icon to return to the callback form.
- Use the buttons at the bottom of the callback form to indicate whether or not the call was successful.
 - Complete:** Click to indicate you reached the requester and completed the callback interaction.
 - Retry:** This button is only enabled if your CIC administrator has enabled retries. Click to remove the callback request from your queue and place it back on the workgroup queue in a “snoozed” state. After an interval configured by your CIC administrator, normal ACD processing of the callback request resumes. The callback request goes to the first available agent in the workgroup. The CIC administrator also configures the maximum number of times agents can retry a callback request.
 - Failure:** Click to indicate that you cannot complete the callback request. It could be that the phone number is incorrect or that no one answered after the last allowed attempt.

Chats

Work with chats in PureConnect for Salesforce

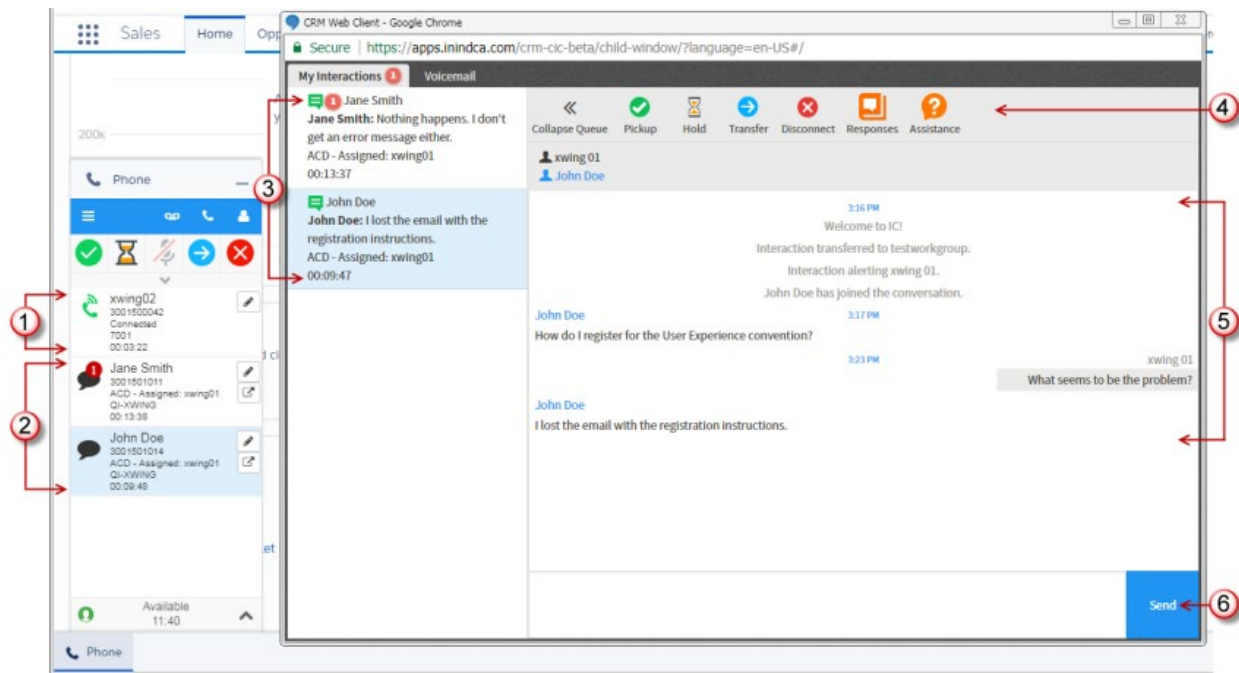
Prerequisites: CIC 2015 R4 is the minimum supported version for chats. Your browser must allow pop-ups for salesforce.com. You need the **Intercom Chat** Security Right before you can participate in an intercom chat. Intercom chats can take place only between users on the same IC server. You cannot start a chat session with a user on a peer server.

Chat sessions are online, real-time, typed conversations between agents or between an agent and a customer browsing your company's website.

- An agent to agent chat is an **intercom chat**. These internal chats can take place only between CIC users on the same IC server. Use intercom chats to get a quick answer to a question or to work with another agent on a problem.

Note: You can chat only with another **logged in** CIC user. Attempting to chat with another CIC user who is not logged in sends you to Chat Mail. You can type a message that is e-mailed to the other CIC user.

- **Web chat** enables a customer to begin a text conversation with an agent, similar to an instant message, SMS text message, or chat room experience. PureConnect for Salesforce can be configured to route multiple concurrent chats to an agent.



1	Multimedia interactions	Depending on how your agent and workgroup utilization is configured in CIC, you can have multiple interaction types on your queue at the same time.
2	Multiple chats	The currently active chat displays.
3	Multi-tab chats	Active and expired chats display in one chat window as separate tabs. A red number indicates unread messages on active chats. Click a tab to make that chat the active chat. The chat window syncs with the interaction view in the softphone.
4	Chat controls	Chat controls across the top of the chat window mirror the controls in the softphone. From either location, you can pick up the chat, place the chat on hold, transfer the chat to another agent, or end the chat session. You can also use Response Management to insert a stored response such as a greeting or the answer to a frequently asked question in your chat. Note: Placing a chat on hold does not display anything to the customer. This is for reporting purposes only.
5	Active chat window	The chat window displays all messages for the active chat from oldest to newest.

6	Send chat message	To deliver a message, type a message in the chat message field and click the chat icon.
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Related Topics

[Answer and control a new chat](#)

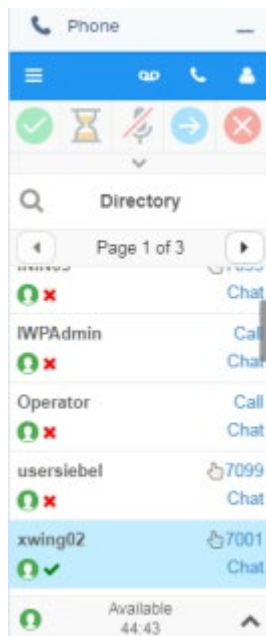
[Navigate multiple chats](#)

[Transfer a chat](#)

[End a chat](#)

Start an intercom chat in PureConnect for Salesforce

You can start an intercom chat with another logged-in CIC user by clicking the **Chat** link next to the user's name in the directory.



Answer and control a new chat in PureConnect for Salesforce

There are a number of ways to pick up or handle an incoming chat.

- Click **Pickup** on the call control.

Result: If the Chat window is not already open, it opens and pops to the foreground. If the Chat window is already open, you can pick up the new chat by selecting it and clicking the Pickup button again.

- Click the incoming alert bar.

Note: If you dismiss the alert bar, you can still pick up the interaction using the call control.

- Click **Disconnect** to dismiss the interaction without answering.

Note: Declined interactions reenter the queue.

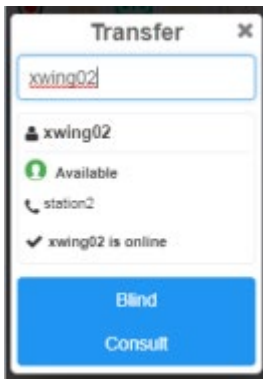
Navigate multiple chats in PureConnect for Salesforce

- To make a chat active from the softphone, click the chat in the interaction view.
- To make a chat active in the pop-out chat window, click the chat's tab.
- To jump to the pop-out chat window for an active chat from the softphone, click the chat icon below the call log icon in the interaction view.

Transfer a chat in PureConnect for Salesforce

1. Select the chat and then click the transfer icon.
2. Type the name, number, or workgroup you are transferring to.

Matching names and workgroups from your CIC directory auto-display for selection as you type. You can see the status and other relevant statistics. A phone icon indicates the agent is on a call.



3. Click **Blind**.

Transferring the chat ends the chat for the transferring agent. Declined transfers reenter the queue.

End a chat in PureConnect for Salesforce

To end a chat, select a chat and then click the disconnect icon on either the pop-out chat window or in the softphone. Expired chats remain on your queue for a deallocation period, typically two minutes.

Use Response Management in a chat in PureConnect for Salesforce

You can use stored responses to avoid typing the same information over and over again. You can select a response and include it in a chat. Your CIC administrator can create system-wide response items and organize them into categories. Your CIC administrator can then grant the necessary rights for all or selected users to use a particular library of response items.

There are some limits to the use of stored responses in chats. Chat interactions are conducted in plain text. Stored responses that contain formatted text are converted to plain text when used in a chat. Hyperlinks and images in a stored response are not sent as part of a chat reply. However, you can use responses containing macros in a chat.

You can send a file to a visitor who starts a chat session from your company's website (**web chat**). This function is not available when you are chatting with other CIC users (**intercom chat**). However, you can send text containing the file path to other CIC users.

Prerequisites: To search for and use system-wide responses, you need the **Response Management Security** right. To use all or selected libraries of the system-wide responses, you need the appropriate **Response Management View Access Control** Right.

Do one of the following:

- If you know a shortcut for the response you need, in the chat message field, type the **shortcut** and press **Ctrl+Space**.
- Search for and select an appropriate response:
 1. In the Chat window, click the **Response Management** toolbar button.
 2. In the **Insert a response dialog**, search for the appropriate response.

Tip: You can navigate the Responses hierarchy by clicking folders and files. Or you can enter part of the text, response name, or label in the **Search for a response** text box.

3. Click **Insert**.
4. After the appropriate response appears in the chat message field, click the **Chat** icon.

Email

Email in PureConnect for Salesforce

Requirements: To work with email messages, you or the workstation you select when you log on need an **ACD Access License** associated with the **Email interaction type**. To pick-up and read ACD-routed email messages, you must belong to a **workgroup** configured in Interaction Administrator to receive email messages. To reply to an email message and create an outbound email interaction, you also need the **View User Queues** or **Modify User Queues** right to your own user queue. You also must be a member of a workgroup configured with an outbound email mailbox. If you have any questions about licensing and workgroup configuration, see your CIC administrator.

You can use PureConnect for Salesforce to read and respond to ACD-routed email messages.

- **ACD-routed email message**

An ACD-routed email message is sent to a mailbox associated with a workgroup. This message is then routed to the workgroup members as an interaction. Like any other interaction, an ACD-routed email message can be included in Customer Interaction Center reports and statistics. You can pick up an ACD-routed email message from the Interactions view.

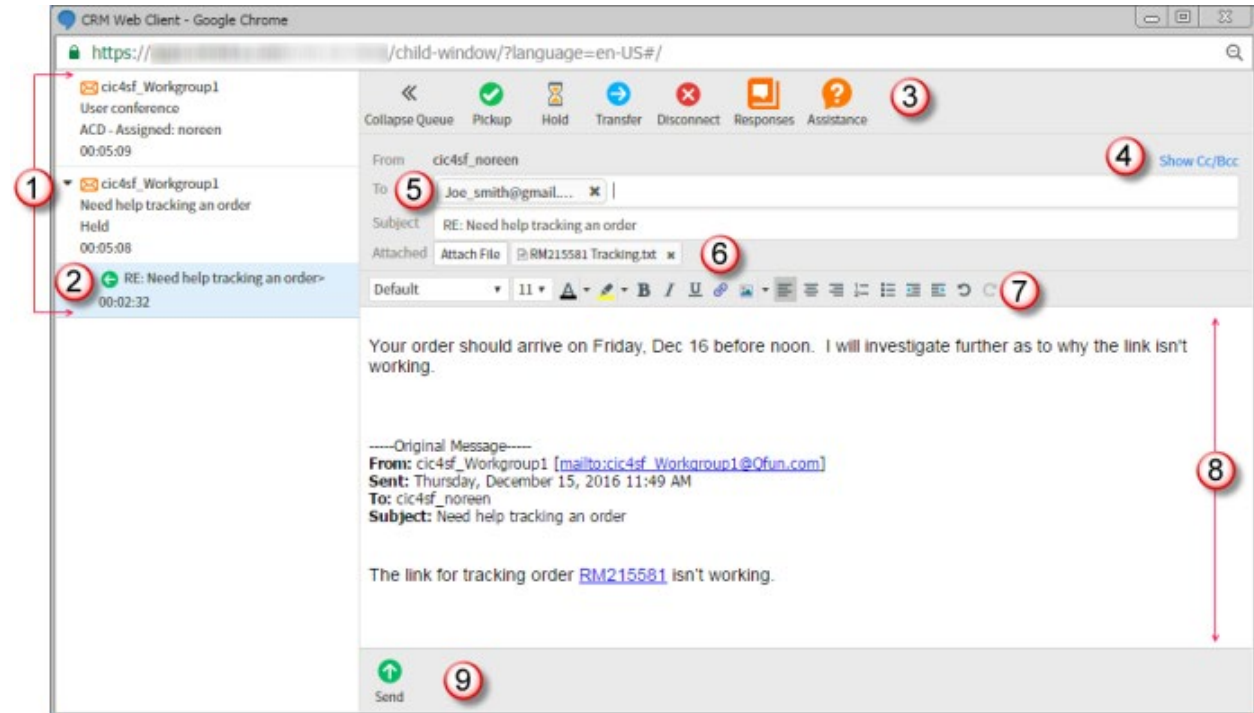
Note: An email message sent to your work email address appears in your email program Inbox as usual.

- **Reply to an ACD-routed email message**

A reply to an ACD-routed email message is an interaction that is processed and sent from PureConnect for Salesforce. Like any other interaction, these email message replies can be included in CIC reports and statistics.

Email views in PureConnect for Salesforce

You currently selected interaction appears in the Email view. Use this view to read incoming email messages and compose replies.



1	Multiple email messages and replies	An email icon identifies an email interaction. Select an email interaction to display it in the email view. Active and expired email interactions and email replies appear as separate tabs. The currently selected interaction is highlighted and appears in the email view. Note: An Email configuration option controls whether inline images and other linked content appear in incoming email messages.
2	Email reply	Email replies appear indented under the associated ACD-routed email message.
3	Interaction controls	Interaction controls across the top of the email view mirror the controls in the softphone. From either location, you can pick up an email message, place an email message on hold, transfer the email message to another agent, or disconnect. You can use Response Management to insert a stored response such as the answer to a frequently asked question in your email reply. You

		can also request assistance from your workgroup supervisor.
4	Show or Hide	<ul style="list-style-type: none"> In an incoming email interaction, click Show Details to display the complete email addresses in the To, Cc, and Bcc fields. Click Hide Details to display only the addressee names. In an email reply, click Show or Hide CC/Bcc to display or hide the carbon copy (Cc) and blind carbon copy (Bcc) address fields.
5	Secure Email icon	When a secure email interaction icon appears next to an email address, it indicates whether CIC verified the email message's digital signature. See Secure Email Messages .
6	Attached files	<p>Any files attached to the email interaction appear here. Depending on the browser you use, you can click on the attachment to download, open, or save the file.</p> <p>Note: If your browser supports playing a particular type of audio file, a Play button appears in place of the file type icon. Click Play to play the complete audio file. During playback, a Stop button replaces the Play button.</p>
7	Editing toolbar	Use the toolbar to format text, insert hyperlinks or upload images. For a description of this toolbar, see Reply to an HTML Email Message .
8	Editing pane	Compose your email reply in this area.
9	Message controls	<ul style="list-style-type: none"> Reply, Reply All and Forward controls appear here for the incoming ACD-routed email interaction. A Send control appears here when you compose an email reply.

Forward an email message in PureConnect for Salesforce

ACD-routed email messages appear in Interactions. You can forward these ACD-routed email messages to another CIC user or workgroup. If the designated transfer recipient does not pick it up, the CIC server returns the email message to your user queue and places it on hold.

Note: If the original email message contains an attachment, it automatically remains attached to the email message if you forward it. However, you can delete the original attachments before forwarding the email message.

Tip: You cannot forward an incoming email interaction until you send or disconnect all the email reply interactions that are associated with the original email interaction in an E-mail conversation.

1. Pickup or reopen an email message.
2. In the [email view](#), click the **Forward** button.
3. Address the forwarded email message by doing one of the following:

Tip: Click **Show Cc/Bcc** to display carbon copy or blind carbon copy address text boxes.

- In an address text box, type the addresses of the email message recipients, separating each address with a semi-colon (;).
- In an address text box, type all or part of the recipient's name. Click the "Search for" prompt. Select a name from the list of matching names.

Note: This list contains matching email addresses that are configured on your Exchange server — typically, your company's employee email addresses.

4. Optionally, do one of the following:
 - If you do not want to forward files attached to the original email message, in **Attached**, click the **x** next to any file name.
 - To attach a file to the email reply, click **Attach File**.
5. In the reply area in the email view, type any text you want to add to this forwarded message.

Tip: Use Response Management to insert a stored response. For more information, see [Use Response Management in PureConnect for Salesforce](#). If the original email interaction was formatted in HTML, you can also use any of the available tools to format your reply. For a description of these tools, see [Reply to an HTML email message](#).

6. Do one of the following:
 - To send this email to the addressed recipients, click **Send**.
Result: The forward email message is sent and its state changes to **Disconnected**.
 - To save this email message to work on it later, click **Hold**.
Result: The email message is not sent. You can pick up this interaction later, make any necessary changes or additions and then send it.
7. If prompted, assign a wrap-up code.
8. After you send the email message reply, select the original email interaction and click **Disconnect**.
9. Close the email view.

Pick up or reopen an email message in PureConnect for Salesforce

You pick up or reopen an ACD-routed email message from the Interactions view. Also, an ACD-routed email message may open automatically, if your user information in Interaction Administrator is configured to Auto-Answer ACD Interactions.

To pick up or reopen an ACD-routed email message, do one of the following:

- Select the email message and click the Pickup button in the Interactions view, then click the Interact icon.
- Select the email message and click Pickup in the [email view](#).

Reply to an email message in PureConnect for Salesforce

The tools available to you when replying to an ACD-routed email message depend on the format of the original email. The instructions in this topic apply to all email message replies. If the original ACD-routed email message is formatted using HTML, additional tools are available to you when composing your reply. For more information, see [Reply to an HTML email message](#).

An email reply interaction is associated with the original incoming email interaction in an Email Conversation. These associated interactions appear below the original interaction and are linked to it.

Some important things about this relationship include:

- More than one email interaction can be associated with the original incoming email interaction.
- You must disconnect the original incoming email interaction manually.

Tip: All of the associated **outgoing** email interactions must be disconnected, transferred or forwarded before you can disconnect the original incoming email interaction.

1. Pickup or reopen an email message.
2. In the [email view](#), click the **Reply** or **Reply All** button.

Note: Responses to messages sent with an alternate "Reply-To" address are delivered to that address. If you selected **Reply All**, replies are delivered to the "Reply-To" address and all of the original recipients, but not to the sender's original address.

3. Optionally, add addresses to the email reply by doing one of the following:

Tip: Click **Show Cc/Bcc** to display carbon copy or blind carbon copy address text boxes.

- In an address text box, type the addresses of the email message recipients, separating each address with a semi-colon (;).
- In an address text box, type all or part of the recipient's name. Click the "Search for" prompt. Select a name from the list of matching names.

Note: This list contains matching email addresses that are configured on your Exchange server — typically, your company's employee email addresses.

4. Optionally, do one of the following:
 - If you do not want to forward files attached to the original email message, in **Attached**, click the **x** next to any file name.
 - To attach a file to the email reply, click **Attach File**.
5. In the reply area in the email view, type your reply message.

Tip: Use Response Management to insert a stored response. For more information, see [Use Response Management in PureConnect for Salesforce](#). If the original email interaction was

formatted in HTML, you can also use any of the available tools to format your reply. For a description of these tools, see [Reply to an HTML email message](#).

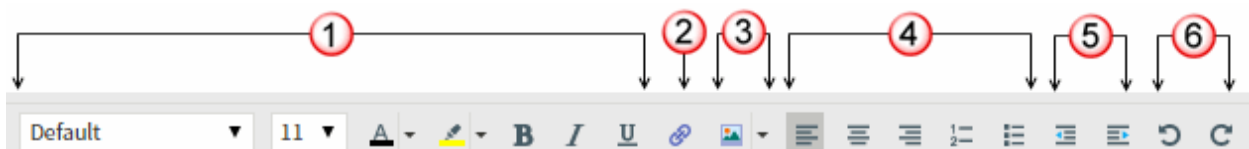
6. Do one of the following:
 - To send this email to the addressed recipients, click **Send**.
Result: The forward email message is sent and its state changes to **Disconnected**.
 - To save this email message to work on it later, click **Hold**.
Result: The email message is not sent. You can pick up this interaction later, make any necessary changes or additions and then send it.
7. If prompted, assign a wrap-up code.
8. After you send the email message reply, select the original email interaction and click **Disconnect**.
9. Close the email view.

Reply to an HTML email message

If the ACD-routed email message you received was formatted using HTML, you have the option of using text formatting tools in your email reply. You can also embed an image or include a hyperlink in your reply. In every other way, replying to an HTML email message is the same as replying to a plain text email message.

Format Text

Tip: Different email clients at your customer sites can interpret line endings differently. To avoid this problem, press Shift+Enter to create a new line. Press Shift+Enter twice to create a blank line between two lines of text. This creates line endings that all email applications can reliably interpret.



1	Font	Use the font controls to bold, underline or italicize selected text. You can also select text color, font and size.
2	Insert Link	Use the hyperlink control to create a working hyperlink in your email reply.
3	Upload Image	Use the image control to insert a picture in your email reply. You can insert an image from your local drive or insert a URL pointing to the image's location. Tip: You can drag and drop an image into an HTML email reply in any browser where you are using Interaction Connect. You can also cut and paste images from the Windows clipboard in all browsers except for

		Internet Explorer 10 and Safari which do not support this feature.
4	Paragraph	Use the paragraph controls to set left, right and center text alignment. You can also create bulleted or numbered lists.
5	Text Indent	Use text indent controls to increase or decrease the space between the selected text and the left margin.
6	Undo and Redo	Use the Undo and Redo controls to reverse the last change you made to your reply or to reverse an Undo action.

Create a hyperlink

You can include a working hyperlink to a webpage in your email reply.

1. Click the **Insert Link** toolbar button.

Result: The URL dialog box appears.

2. In the **URL** text box, type the URL for a webpage.

Result: The URL text defaults to the Text box.

3. Optionally, in the **Text** box, replace the URL with a word or phrase to appear as the hyperlink text.
4. Click **Insert Link**.

Insert an image

1. Place your cursor in the email reply at the point where you want the image to appear.
2. Do one of the following:

- Click the **Upload Image** toolbar button.
- **Insert Image URL** toolbar button.

- 1.

3. Do one of the following:

- If you clicked the **Upload Image** toolbar button, locate an image on your workstation and click **Open**.
- If you clicked the **Insert Image URL** toolbar button, in the text box, type the URL for the image and click **Insert Image**.

Result: The selected image appears in the email reply message.

Secure email messages

The Secure Email Messages feature supports signatures for incoming queued email messages. If the workgroup to which you belong is properly configured in Interaction Administrator, your workgroup's

mailbox can process a secure email message and route it to you for reply. Or an Interaction Attendant mailbox can be configured to receive and route secure email messages.

The Secure Email Message feature supports **cryptographic signatures**. A cryptographic signature prevents anyone from modifying the contents of an email message while it is in transit. An email signature can also provide authentication of the sender of a message and verify they are who they say they are.

The Secure E-mail Message feature **does not**:

- Enable you to send a signed response to a secure email message.
- Enable you to listen to an encrypted email message in Interaction Mobile Office. However, you can listen to a signed email message.
- Work with monitored mailboxes set up in Interaction Administrator.
- Provide any email tools that can be used to customize the handling of secure email messages.

Overview of Secure E-mail Messages

An email message is primarily routed over the Internet using the Simple Mail Transfer Protocol (SMTP) and is formatted using the Multipurpose Internet Mail Extensions (MIME). An extension of MIME, known as Secure/Multi-part Internet Mail Extensions (S/MIME), enables MIME data to be sent and received securely.

S/MIME primarily provides two methods related to the security of email messages: digital signatures and encryption. Digital signatures and encryption are achieved through the use of the public key infrastructure (PKI) and digital certificates.

Note: The current release of PureConnect for Salesforce does not support email message encryption. Your CIC administrator uses Interaction Administrator to configure the secure email feature. The CIC administrator also sets up and stores the appropriate email certificates and private keys used to verify digital signatures and establish secure email provider connections.


Support for S/MIME enables a signed email message to be sent to the email address associated with a workgroup's email queue or an Attendant mailbox.

In a typical scenario, one of your customers obtains a digital certificate for your workgroup's email address. The customer may use that digital certificate to sign and send an email message containing confidential information such as an account number to the workgroup's email address. Interaction Center validates the digital signature and routes it to an available agent in your workgroup.

Secure E-mail Interaction Icons

The icons for secure email interactions identify whether the interaction was signed.

Tip: Click the icon to display details about the associated signature.

Icon	Description
	Digital signature was verified.



A digital signature is present, but Customer Interaction Center experienced one of the following problems:

- The signer's certificate is not trusted.
- The email message was modified in transit.
- The "From" address in the email header does not match the digital signature.

Transfer an email message in PureConnect for Salesforce

ACD-routed email messages appear in My Interactions. You can transfer these ACD-routed email messages to another user or workgroup. If the designated transfer recipient does not pick it up, the CIC client returns the email message to the workgroup queue.

Tip: You cannot transfer an incoming email interaction until you send or disconnect all the email reply interactions that are associated with the original email interaction in an E-mail conversation.

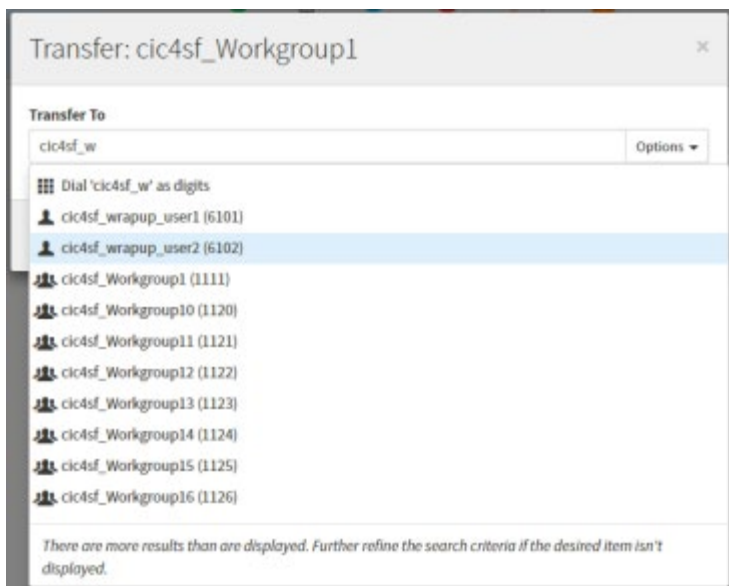
Note: If the original email message contains an attachment, it automatically remains attached to the email message if you transfer it. You cannot delete original email message attachments.

1. Pickup or reopen an email message.
2. In the [email view](#), click the **Transfer** button.

The Transfer dialog box appears.

3. In the **Transfer to** text box, type all or part of the recipient's name or number.

Matching names and workgroups from your CIC directory auto-display for selection as you type.



Tip: If the drop-down list of choices does not contain the intended recipient, check the search criteria selected in the **Options** drop down list and adjust them if necessary.

4. From the drop-down list, select the appropriate name and associated extension number.

Status information for the intended recipient appears. You can check whether an agent is available. For workgroups, among other relevant statistics, you can see how many other interactions are waiting on this queue.

5. Click the **Transfer** button.

The transferred email message disappears from the email view and is routed to the selected recipient.

Use Response Management in an Email Reply in PureConnect for Salesforce

Requirements: See [Response Management](#).

You use stored responses to avoid typing the same information over and over again. You can search for a stored response and insert it in an email reply or a forwarded email message.

Do one of the following:

- If you know a shortcut for the response you need, in the chat message field, type the **shortcut** and press **Ctrl+Space**.
- Search for and select an appropriate response:
 1. In the Email view, click the **Response Management** toolbar button.
 2. In the [Insert a response dialog](#), search for the appropriate response.

Tip: You can use full-text searching by entering terms in the **Search for a response** text box in the Response Management view. For more information, see [Search for a Response](#).

3. Click **Insert**.

- If the response is a file, an **Attached** box appears and displays the name of the attached file. A progress bar appears while a large file is being attached.
- If the response is a message, the text appears in the email response section. When you use a stored response created with the **Inherited** font, it adopts the font and font characteristics (size, color, and so on) of the text immediately preceding it in your email message. However, when you insert a response that has a selected font and other font characteristics, then the stored response appears as originally formatted. For more information, see [Create personal responses](#).

Note: To use the information indirectly when composing a reply to an email message, view a selected Response in the **Response Management** view.

4. Make any necessary changes or additions and then click **Send**.

Note: For more information about replying to ACD-routed email messages, see [Reply to an email message](#).

Workgroups

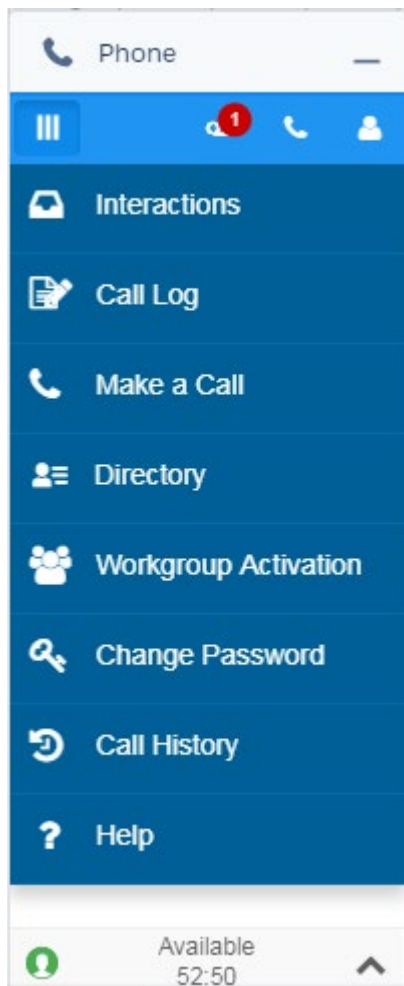
Change your workgroup activation status in PureConnect for Salesforce

Requirements: You need the **Activate self** Access Control right for the selected workgroup to change your workgroup activation status. You also need to be a member of that workgroup. Finally, the workgroup must be configured as **Active** and also have an ACD queue.

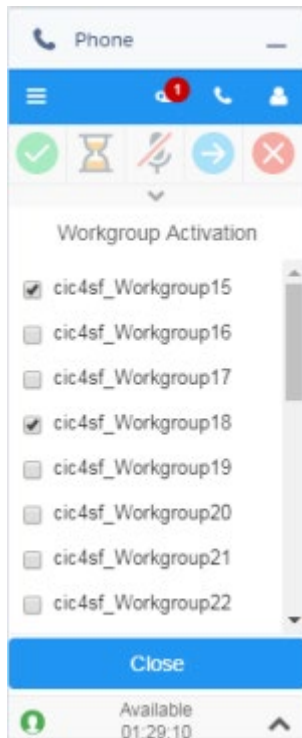
In order to receive an ACD workgroup call, you must be logged in to PureConnect for Salesforce, have your workgroup activation status set to **Active**, and set your status to an "Available" type.

To change your workgroup status:

1. From the menu, select **Workgroup Activation**.



2. In the Workgroup Activation dialog box, select or clear activation status check boxes for the workgroups to which you belong.



3. Click **Close**.

Workgroup Queues view

The Workgroup Queues view appears in a separate browser window when you click the Workgroup Queues button. It displays the interactions currently in a selected workgroup queue. You can pick up an interaction from this view and add it to your queue in My Interactions

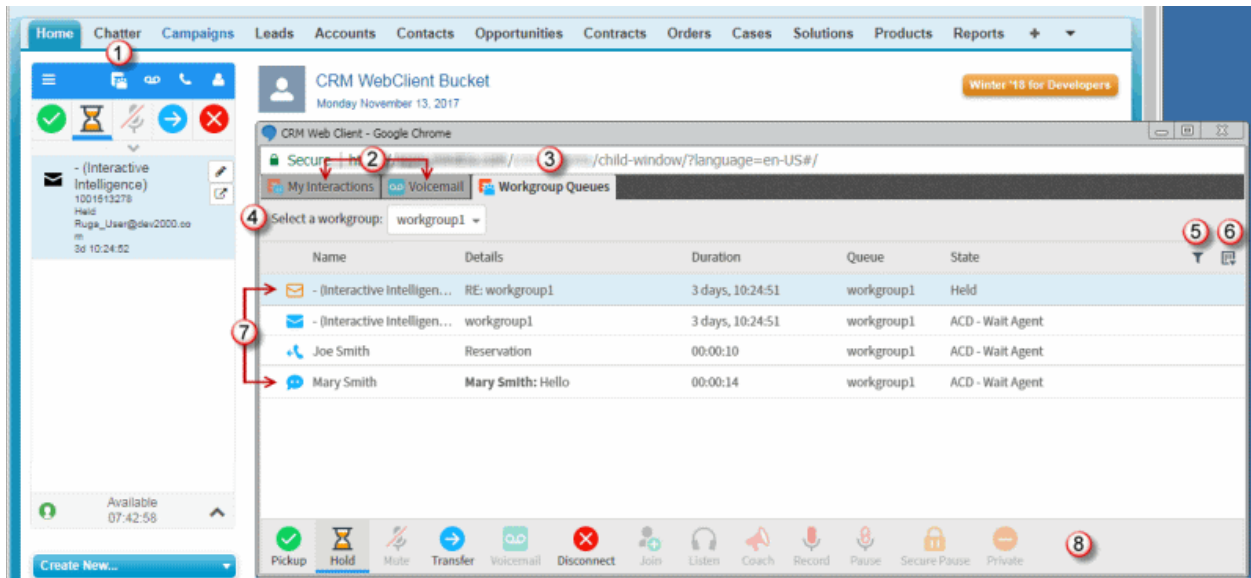
Requirements: You need the appropriate Access Control rights to view or work with queues other than your own. To display a workgroup queue view, you need the **View Workgroup Queues** right. To manage interactions on a displayed workgroup queue, you need the **Modify Workgroup Queues** right.

The **View Queue Columns** Access Control right determines which queue columns you can display in My Interactions or Workgroup Queue views.

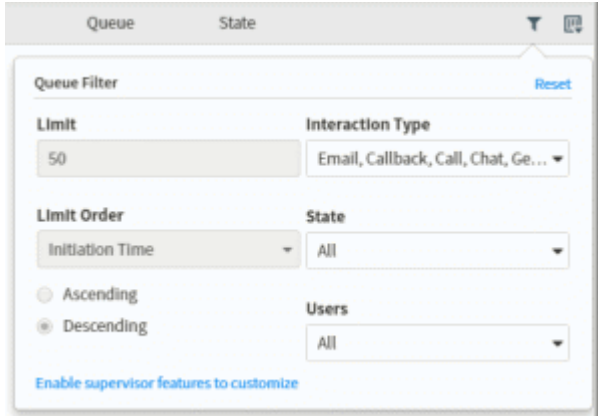
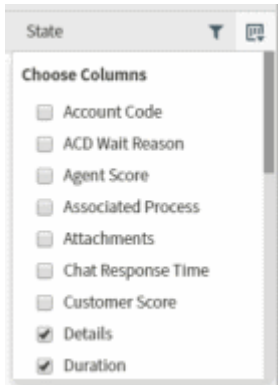
The rights to Disconnect, Hold, Mute, Pickup and Transfer interactions can be individually assigned for a selected queue. The rights to Coach, Join, Listen, Record, or Snip interactions can also be individually assigned for a selected queue. To perform monitoring functions in a displayed queue, you need the **Monitor Workgroup Queues** right.

Workgroup Queues View Features

This diagram illustrates the main features of the Workgroup Queues View.



1	Click the Workgroup Queues button to display the browser window containing the Workgroup Queues view.
2	The My Interactions and Voicemail views also appear in this browser window. To manage your currently connected interaction, select the My Interactions view.
3	The Workgroup Queues view displays a list of the current interactions on a selected workgroup queue.
4	Select a workgroup to display its current interactions. Requirement: To display a queue, you need the View Workgroup Queues right for that queue.
5	Configure filter options . You can filter interactions in a queue view by type, state, and assigned user. If you have an Interaction Supervisor Plug-In: Workgroup license and enable Supervisor Features , you can configure the maximum number of interaction displayed and the order in which the interactions are retrieved from the CIC server. For more information, see Filter a Queue View .

	
<p>6</p>	<p>Choose the columns to appear in the Workgroup Queues view.</p> <p>Requirement: The View Queue Columns Access Control right determines which queue columns you can display</p> 
<p>7</p>	<p>The Workgroup Queues view contains a list of interactions awaiting action on a selected workgroup queue. A vertical scroll bar appears if there are more interactions that can be displayed in the available space.</p>
<p>8</p>	<p>Queue control toolbar. When you pick up an interaction from a workgroup group, switch to the My Interactions or the CIC client view to manage that interaction.</p> <p>Requirements: To manage interactions on a displayed workgroup queue, you need the Modify Workgroup Queues right. Also the rights to toolbar button actions can be individual assigned for a selected workgroup queue. Finally, to perform monitoring functions in a displayed queue, you need the Monitor Workgroup Queues right.</p>

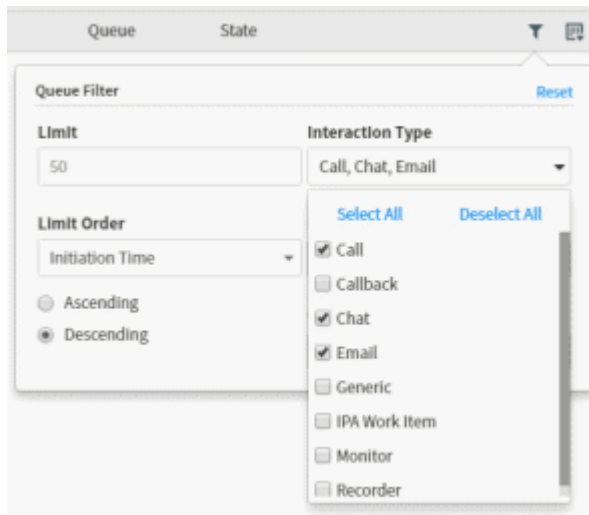
Filter a Queue View

You can filter interactions in a queue view by type, state, and assigned user.

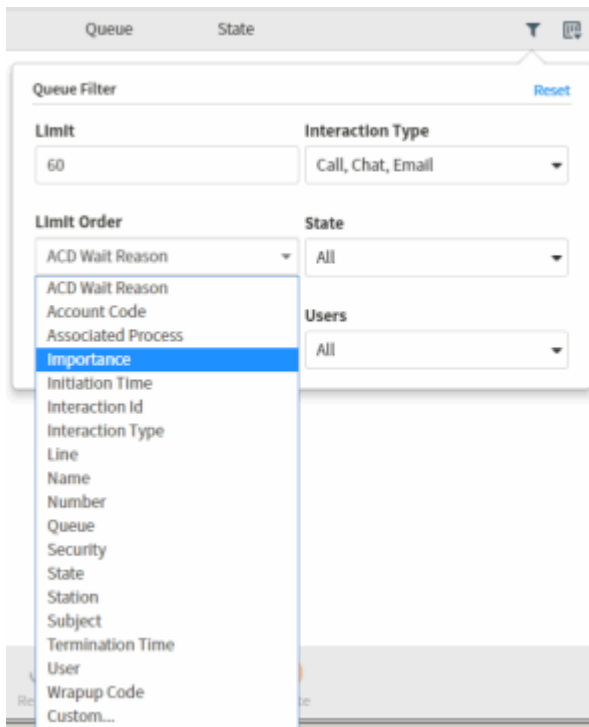
Note: This applies to workgroup queue views. You cannot filter the [My Interactions view](#).

To filter a queue view:

1. Click the **Configure Queue Filter** control in the upper right corner of the queue view.
2. To set options for **Interaction Type**, **State**, and **User**, select check boxes or use the **Select All** or **Deselect All** controls.



Note: If you have an **Interaction Supervisor Plug-In: Workgroup** license and enable Supervisor Features in Interaction Connect, you can configure additional queue filter parameters.



3. Set **Limit** to the maximum number of interactions displayed in this queue view.

Note: There is a default limit of 50 interactions in queues other than My Interactions. There is also a hard limit of 200 interactions in queues other than My Interactions. Your CIC administrator can use server parameters to adjust these limits. Even if you have the appropriate license and enable Supervisor Features, you cannot exceed the hard limit.

4. Set **Limit Order**

1. **Note:** Limit Order is not the same as sorting the queue view by a selected column. This controls the order in which the interactions are retrieved from the CIC server.

5. To apply the filters and close the Queue Filter dialog, click anywhere outside the dialog

Note: When you apply a filter to a queue view, the Configure Queue Filter control changes color to orange.

Response Management

Response Management in PureConnect for Salesforce

Requirements: To create and manage personal responses or to search for and use personal and system-wide responses, you need the **Response Management** Security right. To use all or selected libraries of the system-wide responses, you need the appropriate **Response Management View** Access Control Right. To use an interaction attribute in a Response Macro, you need the **Substitute Queue Columns** Access Control Right.

In CIC systems that were upgraded from previous releases, you can also see an older system-wide response library named "Interactions." Using responses from this older library requires specific Access Control Rights: **View Interaction Files**, **View Interaction Messages**, and **View Interaction URLs**.

Response Management enables you to use pre-defined items such as messages and stored files to handle interactions more quickly. Your CIC administrator can create system-wide response items and organize them into categories. Your CIC administrator can then grant the necessary rights for all or selected users to use a particular library of response items. You can also create your own personal responses for information you type over and over again in interactions with customers or for files you often send to customers.

You can:

- View, select, and use a stored response during a chat session or in a reply to an ACD-routed email message.
- Create your own stored responses for the information that you need most often.

Response Organization

The organization of responses has three levels:

- **Library:** A library (also called a server document) is the top-level collection of related response items. A library contains individual response items (such as a standard greeting or statement of your typical business hours) which can be organized into categories. There are two types of response libraries:
 - **System-wide:** The CIC administrator can create response libraries that are available to CIC client users with the appropriate Response Management View Access Control Right. For example, your CIC administrator could create a system-wide response library for

Support representatives and a general-purpose response library for all users. If you have the appropriate rights, these libraries appear in the **Insert a Response** view.

Note: Your CIC administrator configures these system-wide response libraries in the Response Management container in Interaction Administrator. For more information, see the *Interaction Administrator Help*.

- **Personal:** You can also create a library of your own responses for the information that you use most often in your job. These responses appear under the **My Responses** folder in the My Responses window.
- **Category:** A category is a folder in a response library. Categories are a way to organize individual response items in a library. Categories are optional.
- **Item:** An item is a single response. There are these types of response items:
 - **Messages:** Message items are stored text messages which can contain greetings, closings, and standard responses to common questions.

Note: A stored text message can contain a working URL hyperlink.

- **Files:** File items are computer files that you can attach to an email message or send to external chat participants.
- **URLs:** URL items are clickable hyperlinks to web pages.

Using Response Management in PureConnect for Salesforce

Requirements: See [Response Management](#).

You use stored responses to avoid typing the same information over and over again. You can insert a response from a system-wide or personal library of response items into certain types of interactions or view the information in a response item during other interactions.

For more information about using Response Management in particular situations, see:

- [Use Response Management in a chat](#)
- [Use Response Management in an email reply](#)

Create personal responses in PureConnect for Salesforce

Requirements: See [Response Management](#).

You can create personal response items that contain information you often need when handling interactions. These personal responses appear in the **My Responses** folder in the Response Management view. You can arrange personal responses in folders (categories). For more information, see Organize Personal Responses.

Note: You can create and edit only your personal responses. Personal responses are private and are not available to other CIC client users. You cannot add to or change the company-wide response items. Company-wide response libraries are indicated by a globe icon.

You can create three kinds of personal responses:

- [Message](#)

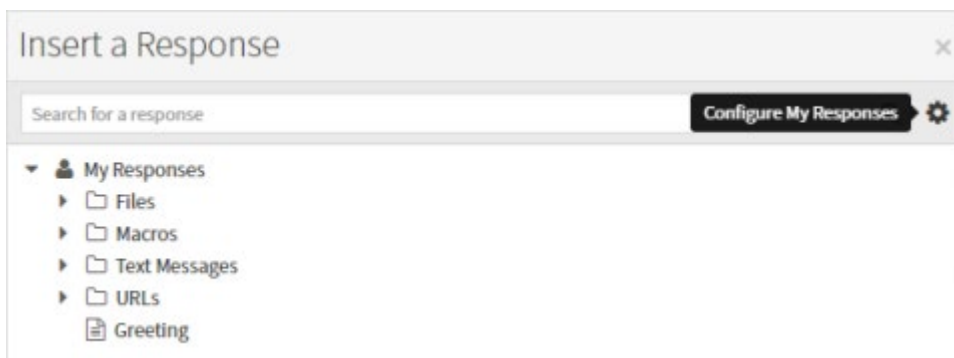
- [File](#)
- [URL](#)

Personal Messages

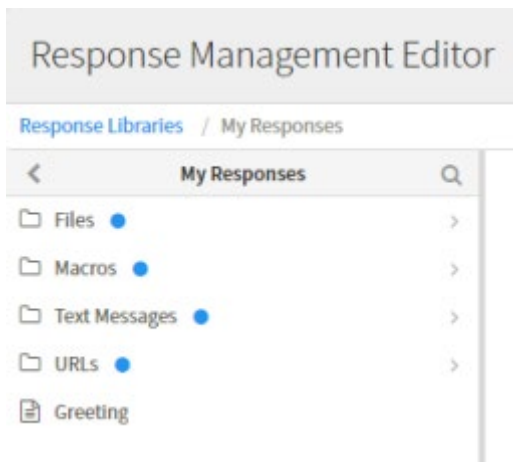
Use messages to save standard text responses that you often use when interacting with customers. For example, you can save a message that contains your typical office hours, phone number, and email address. You can then use this response in a Chat or Email message and never have to type this information again.

Note: A stored message can contain a working URL hyperlink.

1. In the Chat window or Email view, click the **Response Management** toolbar button.
2. In the [Insert a Response dialog box](#), click the **Configure My Responses** icon.



3. In the **Response Management Editor**, click the **Expand Category** arrow for **My Responses**. If needed, continue to click Expand Category arrows to navigate to the appropriate category.



4. When you reach the appropriate category, click the **Add** button.
5. From the Type popup menu, select **New Text Response**.
6. In the **Name** text box, type a name for this stored message.

Note: Response Management provides a full-text search tool that uses the information in **Name**, **Shortcut**, and **Labels** along with the response item's content to find a response. See also [Search for a response](#).

Tip: Name identifies the response item, but does not have to be unique. If you do not provide a name, it defaults to "New Text."

7. In the **Shortcut** text box, type a short name, abbreviation, or code.

Tip: The shortcut does not have to be unique. For example, you could use the shortcut "Hi" for all the variations of your standard greeting. For more information, see [Use a response shortcut](#).

Note: Do not use any of these restricted characters in your shortcut: ~ ! ? * ^ \ . These special characters prevent the shortcut from working.

8. In the **Labels** text box, type a space-separated list of words that identify or classify this response item.

Note: As you type labels, a drop down list appears that lists the labels you have already used. You can select a label from this list.

9. In the composition area, type the text of the message.

Tip: Different email clients at your customer sites can interpret line endings differently. To avoid this problem, press **Shift+Enter** to create a new line. Press **Shift+Enter twice** to create a blank line between two lines of text. This creates line endings that all email applications can reliably interpret.

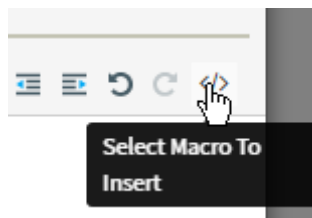
10. Optionally, do any of the following in the My Responses Editor:

Note: There are some limits to the use of stored responses in chats. Chat interactions are conducted in plain text. Stored responses that contain **formatted text** are converted to plain text when used in a chat. **Hyperlinks** and **images** in a stored response are not sent as part of a chat reply. However, you can use responses containing macros in a chat.

- **Format the text:** Use any of the text formatting tools.
- **Insert Link:** Create a clickable link to a URL by clicking the **Insert Link** tool. Supply the necessary URL address and the text for the link. If you selected some text in the stored response before clicking Insert Link, it appears as the clickable text.
- **Insert Image URL:** Supply a URL ending in the image file name. This URL must be accessible to your browser. Supply the text for the link and click **Insert Link**.

Tip: You can also copy and paste the image from your browser to the stored response.

- **Add a Response Macro:** Response macros automatically insert a system value like today's date, an interaction attribute such as the customer's name, or another response item into your email message or chat. Click the **Select Macro to Insert** toolbar button to insert a macro in a personal message. See [Create response macros](#) for more details.



11. Click **Save**.

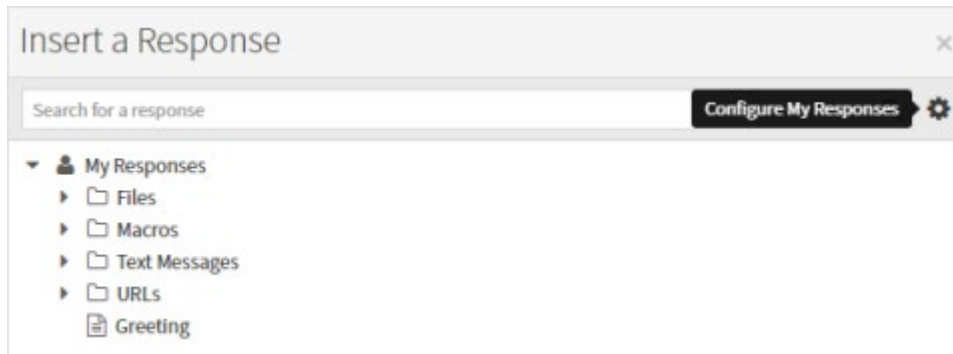
Result: The new response item appears in the selected folder in the **My Responses** window.

Tip: Interaction Connect saves new items and changes to existing items only after you press **Save**. You can create multiple new items or make multiple changes before you press **Save**.

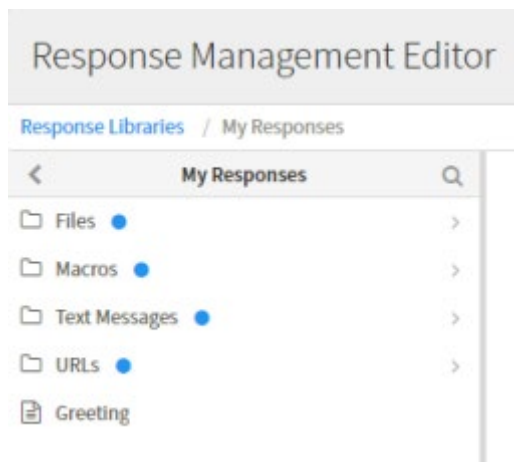
Personal Files

Personal files are files that you upload from your workstation.

1. In the Chat window or Email view, click the **Response Management** toolbar button.
2. In the **Insert a Response** dialog box, click the **Configure My Responses** icon.



3. In the **Response Management Editor**, click the **Expand Category** arrow for **My Responses**. If needed, continue to click Expand Category arrows to navigate to the appropriate category.



4. When you reach the appropriate category, click the **Add** button.
5. From the Type popup menu, select **New File Response**.
6. In the **Name** text box, type a name for this stored response.

Note: Response Management provides a full-text search tool that uses the information in **Name**, **Shortcut**, and **Labels** along with the response item's content to find a response. See also [Search for a response](#).

Tip: Name identifies the response item, but does not have to be unique. If you do not provide a name, it defaults to "New Text."

- In the **Shortcut** text box, type a short name, abbreviation, or code.

Tip: The shortcut does not have to be unique. For example, you could use the shortcut "Hi" for all the variations of your standard greeting. For more information, see [Use a response shortcut](#).

Note: Do not use any of these restricted characters in your shortcut: ~ ! ? * ^ \ . These special characters prevent the shortcut from working.

- In the **Labels** text box, select one of your previously-used labels from the drop-down list or type a space-separated list of words that identify or classify this response item.
- In the composition area, do one of the following:
 - Drag and drop a file from Windows Explorer to the composition area.
 - Click **Choose a file**, navigate to the file and click **Open**.

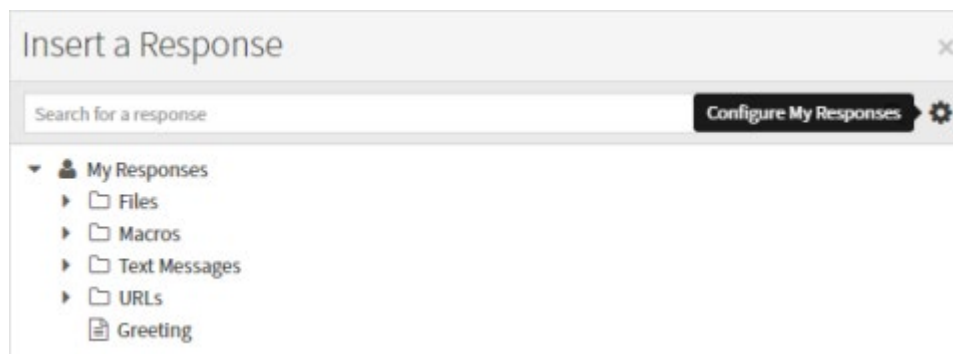
Note: There is a limit of one file per stored response.

- Click **Save**.

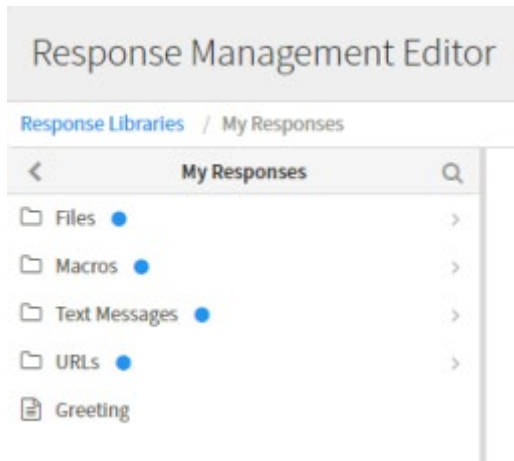
URLs

URLs are clickable hyperlinks to web pages.

- In the Chat window or Email view, click the **Response Management** toolbar button.
- In the **Insert a Response** dialog box, click the **Configure My Responses** icon.



- In the **Response Management Editor**, click the **Expand Category** arrow for **My Responses**. If needed, continue to click Expand Category arrows to navigate to the appropriate category.



4. When you reach the appropriate category, click the **Add** button.
5. From the Type popup menu, select **New URL Response**.
6. In the **Name** text box, type a name for this stored response.

Note: Response Management provides a full-text search tool that uses the information in Name, Shortcut, and Labels along with the response item's content to find a response. See also [Search for a response](#).

Tip: Name identifies the response item, but does not have to be unique. If you do not provide a name, it defaults to "New Text."

7. In the **Shortcut** text box, type a short name, abbreviation, or code.

Tip: The shortcut does not have to be unique. For example, you could use the shortcut "Hi" for all the variations of your standard greeting. For more information, see [Use a response shortcut](#).

Note: Do not use any of these restricted characters in your shortcut: ~ ! ? * ^ \ . These special characters prevent the shortcut from working.

8. In the **Labels** text box, select one of your previously-used labels from the drop-down list or type a space-separated list of words that identify or classify this response item.
9. In the URL text box, type or copy and paste the URL.
10. To test that the URL is correct, click **Open URL**.
11. Optionally, in the Text box, type the name for a clickable link.
12. Click **Save**.

Create response macros in PureConnect for Salesforce

Requirements: See [Response Management](#).

You can insert placeholder fields in a response item that are replaced when the response is used. Placeholder fields can be replaced with a constant, interaction attribute or another stored response.

Macros take this form [field:data]. Field identifies the response macro type. Data is optional. There are three types of macros: constant, attribute, and response.

System

System macros do not depend on the dynamic context of the interaction into which you are inserting it. Here are the currently supported system macros.

Field	Value
User Name	The display name of the logged on user, most likely your display name.
Current Date	The short form of the current date based on the language used in your country or region.
Current Time	The short form of the current time based on the language used in your country or region.

Example

Macro: My name is [UserName]. Today is [Date], how can I help you?

Result: My name is Mary Jones. Today is 9/15/2015, how can I help you?

Attribute

Attribute macros substitute a value of an attribute based on your current interaction. In the response item, Attribute macros must have a field name of Attribute; data is the attribute name.

Note: To use an interaction attribute in a Response Macro, you need the Substitute Queue Columns Access Control right for the interaction. If you do not have the appropriate right, the value does not replace the attribute.

Example

Macro: Hello, [Attribute:Eic_RemoteName]. How can I help you?

Result: Hello, John Smith. How can I help you?

Response

Response macros insert another response item into your response. If the inserted response contains macros, the inserted response contains the appropriate values. Response macros have a field name of Response. The data is the Shortcut name for the specified response item.

Note: Response substitution is not supported if you drag and drop the response item to an interaction. Also, if there is more than one response item with the same Shortcut name, the first one located is used; you do not get to select one.

Example

Shortcut for the inserted response item: signoff

Inserted response item: Again, my name is [UserName]. Thanks for chatting!

Macro: Glad to help. [Response:signoff]

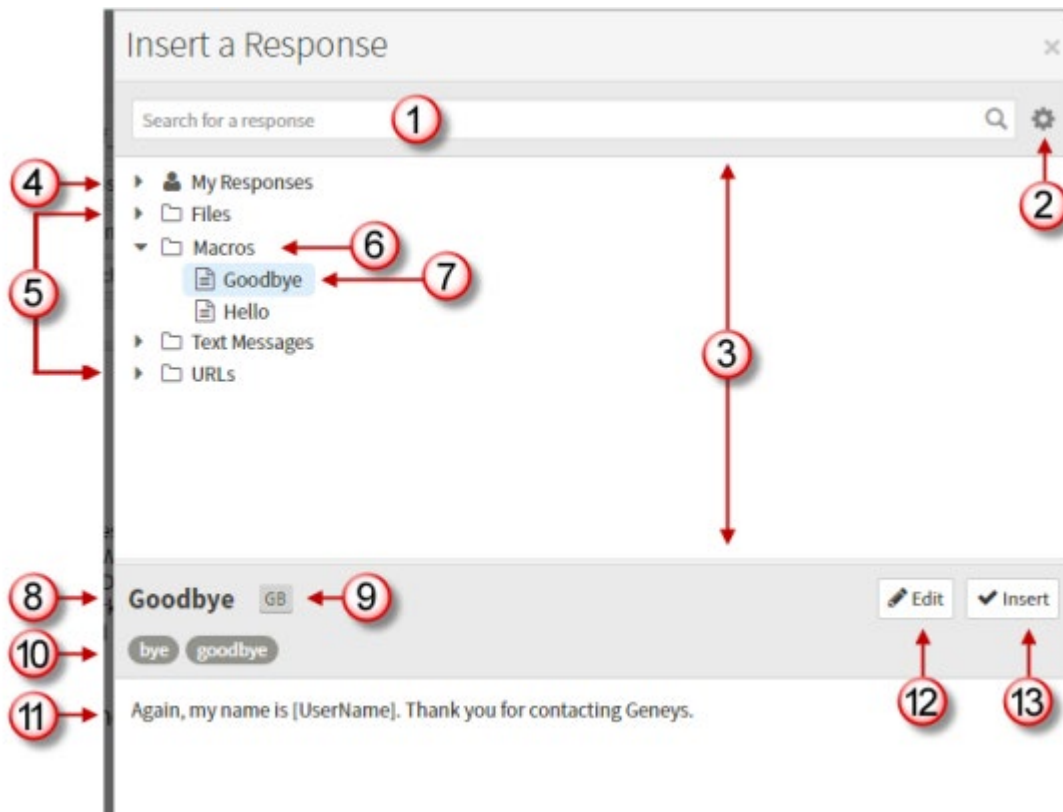
Result: Glad to help. Again, my name is Mary Jones. Thanks for chatting!

Insert a Response dialog box in PureConnect for Salesforce

Requirements: See [Response Management](#).

You can use the Insert a Response dialog box to search for stored responses during any interaction. You can insert these responses in a chat response or email reply.

To display the Insert a Response dialog box, in the Chat window or Email view, click the **Response Management** toolbar button.



1	Search	To locate a response, use the full-text Search for a response box. For more information, see Search for a Response. Note: This full-text search tool uses the information in Name, Shortcut, and Labels along with the response item’s content to find a response.
2	Configure My Responses	Click this tool to open the Response Management Editor . You can create, edit and delete your personal responses.

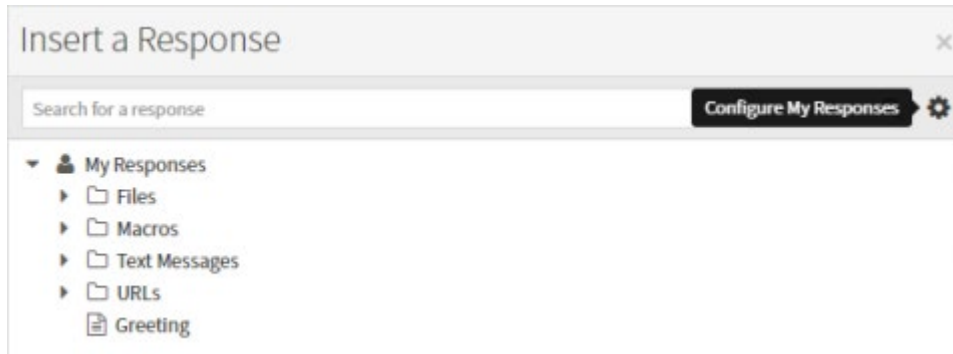
3	Navigation Pane	To locate a particular response, click anywhere in this hierarchical view, expanding categories as needed. Both your personal and system-wide response items and categories appear in this tree view.
4	My Responses	<p>This folder contains your collection of personal responses. It can be organized into categories.</p> <p>Note: You cannot create personal responses in the current release of Interaction Connect. However, you can create personal responses in another CIC client, such as Interaction Desktop, and use these responses in Interaction Connect. For more information about creating personal responses, see the help in whichever alternative CIC client you use to create personal responses.</p>
5	System-wide Responses	<p>Your CIC administrator can create libraries of standard responses that all or selected CIC client users can use.</p> <p>Requirement: You need the appropriate Response Management View Access Control Right to use any of the system-wide response items.</p>
6	Category	Categories are folders or collections of response items. An arrow indicates a category name.
7	Selected item	The selected response item is highlighted.
8	Name	This is the name of the selected response item. This name does not have to be unique. It can default to the first few characters of a message or a file's directory path.
9	Shortcut	You can type the shortcut and press Ctrl+Space to insert the response item in a chat or email reply.
10	Labels	Labels provide more search terms.
11	Preview Pane	The preview pane displays an HTML preview of a selected item's text or the directory path and file name of a selected file.
12	Edit	Click the Edit control to open the item in the Response Management Editor and make any necessary changes.
13	Insert	Click Insert to use selected item in an active and selected chat or email.

Response Management Editor in PureConnect for Salesforce

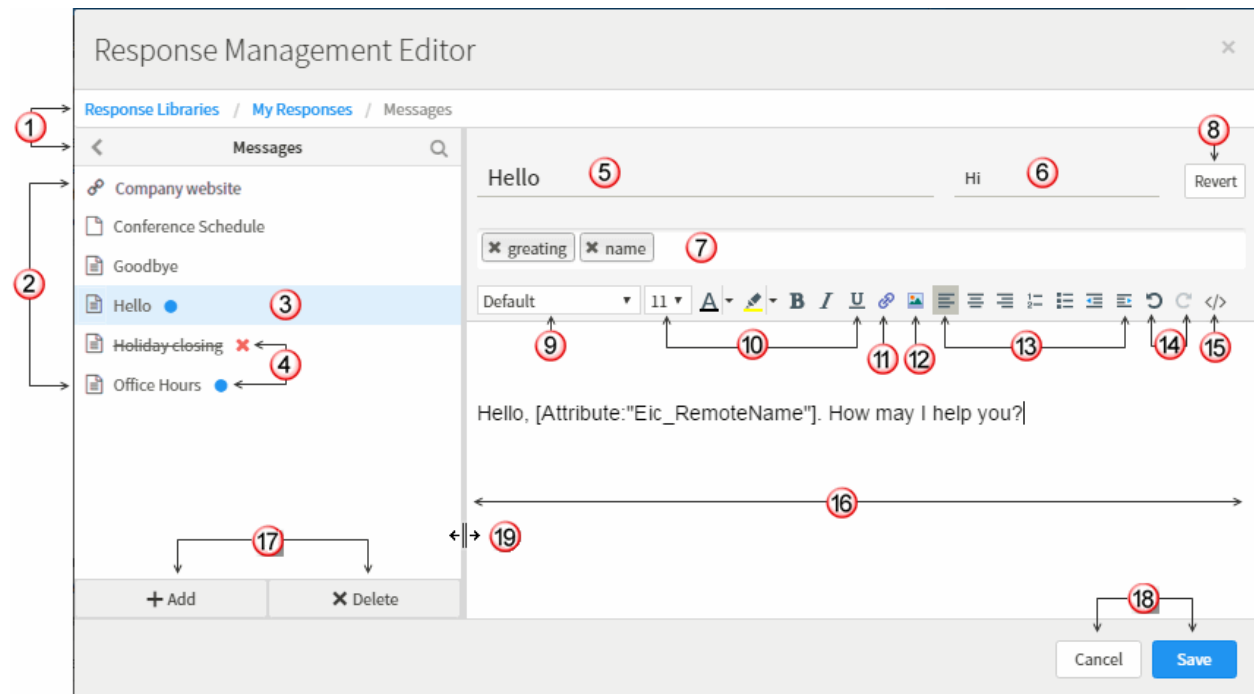
Requirements: See [Response Management](#).

To create and edit response items, use the Response Management Editor. It is a full-featured HTML editor with text formatting tools for messages. You can insert Response Macros, create hyperlinks, and add images.

1. In the Chat window or Email view, click the **Response Management** toolbar button.
2. In the [Insert a Response dialog box](#), click the **Configure My Responses** icon.



Result: The Response Management Editor appears.



Editor tools

The Response Management Editor contains navigation and text editing controls. For more information about creating or editing personal responses, see [Create personal responses](#).

1	Navigation	To locate a response or view the items in a category, use navigation
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	Aids	bar, the arrows or the Search control.
2	Response items	This area displays the names of the response items in the current category. Icons indicate the type of response item. These are the same icons that appear when you add a new response item.
3	Selected item	The currently selected item is highlighted.
4	State	Interaction Connect updates response items only after you press Save . <ul style="list-style-type: none"> • A blue circle indicates that Interaction Connect has not yet saved a new item or changes to an item. • Struck through text and a red X indicate that Interaction Connect has not yet deleted an item you selected for deletion.
5	Name	Name identifies the response item, but does not have to be unique. If you do not provide a name, it defaults to the first few characters of a message or a file's directory path. <p>Note: Response Management provides a full-text search tool that uses the information in Name, Shortcut, and Labels along with the response item's content to find a response.</p>
6	Shortcut	To make it easier to insert this response in a chat or email reply, assign a shortcut. For more information, see Use a response shortcut .
7	Labels	Labels provide additional search terms
8	Revert	Revert removes all the changes you have made to the currently selected response item.
9	Font	You can select a font or use the Default font setting. <p>Note: When you use a stored response, text with the Default font setting adopts the font and font characteristics (size, color, and so on) of the text immediately preceding it in your email message. However, when you insert a response containing text with a selected font and other font characteristics, then the text appears as originally formatted.</p>
10	Font characteristics	The editor includes a full range of text formatting tools. Tooltips identify each of the tools.
11	Insert Link	Insert a link to a URL. You can also turn a selected word or phrase

		into a clickable hyperlink.
12	Insert Image URL	<p>Add a link to the URL for an image. The person receiving this response can click the link to view the image.</p> <p>Tip: You can also copy and paste an image selected in your browser to a stored response.</p>
13	Paragraph controls	These tools include alignment, list, and indenting options.
14	Undo and Redo	Undo and Redo apply only to changes in the editing pane. You can undo your last typing action, one word at a time. Or remove an inserted Link or Image URL.
15	Select Macro to Insert	Insert placeholder fields that are replaced when the response is used. Select a system value, interaction attribute or another stored response. For more information, see Create response macros .
16	Editing pane	<p>Type, format, and edit your message here.</p> <p>Tip: Different email clients at your customer sites can interpret line endings differently. To avoid this problem, press Shift+Enter to create a new line. Press Shift+Enter twice to create a blank line between two lines of text. This creates line endings that all email applications can reliably interpret.</p>
17	Add and Delete	<ul style="list-style-type: none"> • Navigate to the appropriate category and select Add to add a new response item. • Select an item and click Delete to mark the item for deletion.
18	Cancel and Save	Interaction Connect saves new response items and changes to items only after you press Save . The same applies to items you mark for deletion. Interaction Connect deletes the item only after you select Save .
19	Splitter	<p>To change the width of the Editing pane, point to the vertical splitter and drag the edge to the left or right.</p> <p>Note: The text formatting toolbar wraps if the editing pane is too narrow. Click the three-dot icon at the end of the toolbar to display the rest of the tools.</p>

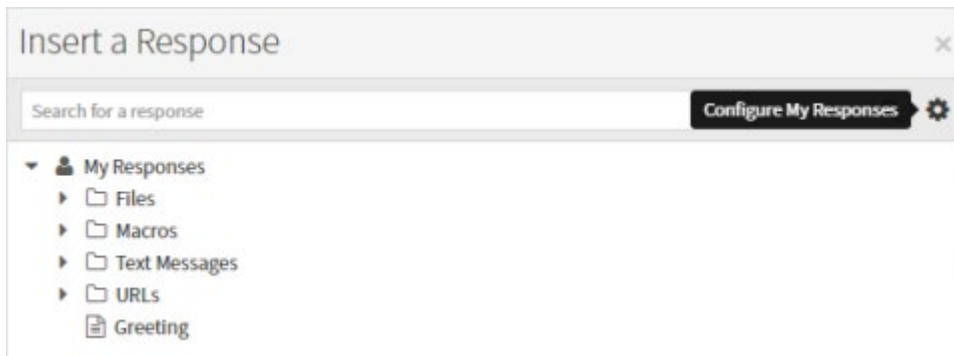
Organize personal responses in PureConnect for Salesforce

Requirements: See [Response Management](#).

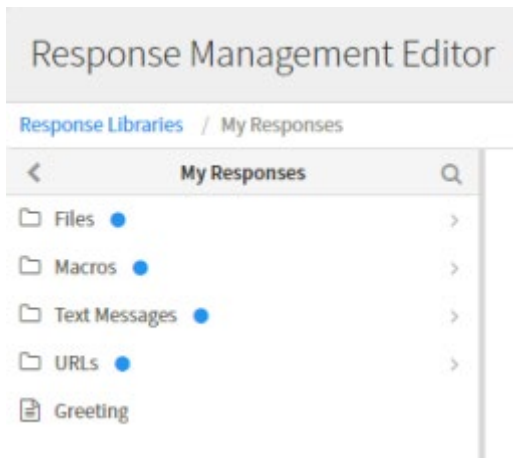
You can make your personal responses easier to locate by storing them in folders. You can nest these folders inside each other to whatever level suits your purpose.

Create a personal folder

1. In the Chat window or Email view, click the **Response Management** toolbar button.
2. In the **Insert a Response** dialog box, click the **Configure My Responses** icon.



3. In the **Response Management Editor**, click the **Expand Category** arrow for **My Responses**. If needed, continue to click Expand Category arrows to navigate to the appropriate category.



4. When you reach the appropriate category, click the **Add** button.
5. From the Type popup menu, select **New Category**.

Result: A new folder appears at the level you selected in the navigation pane.

6. Type a name for the category in the **New Category** text box.
7. Click **Save**.

Working with Response Folders

You can perform any of the following actions when working with your personal folders in the Response Management window.

- Rename a folder by selecting the folder in the navigation pane and then typing over the name in the **Name** text box.

- Delete a folder along with any personal responses it contains by selecting the folder, clicking **Delete**.

Note: In a similar fashion, you can also delete a selected response by selecting the response item, clicking **Delete** and then clicking **Save**.

- View the contents of a personal response by clicking the response item. Check the contents in the editing pane of the Response Management Editor.

Search for a response in PureConnect for Salesforce

Requirements: See [Response Management](#).

You can locate and use any personal response item or any system-wide response item to which you have rights in an interaction. You can use a response item directly by inserting it into some types of interactions. Or, you can use it indirectly by reviewing the information in a response item as an aid to resolving a customer problem or question.

Full-Text Search

You can use full-text searching to locate a needed response item. Full-text searching looks for matching text in the Name, Label, Shortcut, and text content of a response item. Full-text searching is available in the **Insert a Response** dialog box.

Type all or the first part of the word or words that identify the response item. For example, typing "foo" locates response items associated with or containing "food," "foot," or "football." All searches are case insensitive.

1. In the [Insert a Response dialog box](#), in the **Search for a response** text box, type all or the first part of the word or words that identify the response item and then press **Enter**.

Result: Matching response items appear.

2. Preview the response by selecting a response item from the search results.



Use a response shortcut in PureConnect for Salesforce

Requirements: See [Response Management](#).

You can use a response shortcut to insert a stored response when you are participating in a Chat Session or composing an Email Reply. Both system-wide and personal responses can have shortcuts.

1. Type all or part of the shortcut and press **Ctrl+Space**.

Tip: To use Response Management shortcuts with certain alternate languages in Windows, such as Chinese Simplified PRC, press **Ctrl+Alt+Space**. For some alternate languages, **Ctrl+Space** changes the language setting. Also, if you use a language IME (Input Method Editor), wait until the text you typed has finished converting to the selected IME language before pressing **Ctrl+Space** for a Response Management shortcut.

Result: If there is only one matching response item, it is automatically inserted in the composition area of the **Current Interaction** view.

2. If there are multiple matching response items, do one of the following:
 - Select the appropriate response from the drop-down list that appears automatically.
 - Continue typing to narrow the search further and then select the appropriate response.
 - Press **Esc** to close the selection drop-down list.

Status

Work with Status in PureConnect for Salesforce

In PureConnect for Salesforce, you can set your status, set status details, and view another user's status.

Statuses in PureConnect for Salesforce

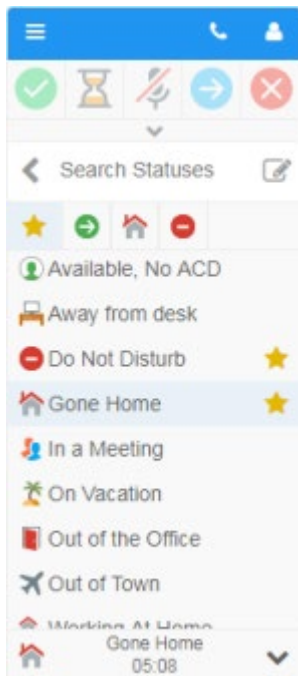
Status controls the announcement of your availability to people who call you. When your status is one of the "do not disturb" statuses, callers hear your status, such as "Bob Jones is out of town." Then they are directed to your voicemail to leave a message.

Whether or not you receive calls depends on the kind of call (ACD or non-ACD) and the type of status. Your system administrator controls whether you can receive ACD calls when are in a particular status.

Your status stays in sync with the CIC client. Other PureConnect for Salesforce users can view your status in the PureConnect for Salesforce directory.

Quickly change your status from the status bar. Status stays in sync with the CIC client.

Tip: Notice how much time (hh:mm:ss) you have spent in your currently selected status appears in the status bar. This can help you monitor how long you have been in a not-available status such as "At Lunch," "Away from Desk," or "In a Meeting."

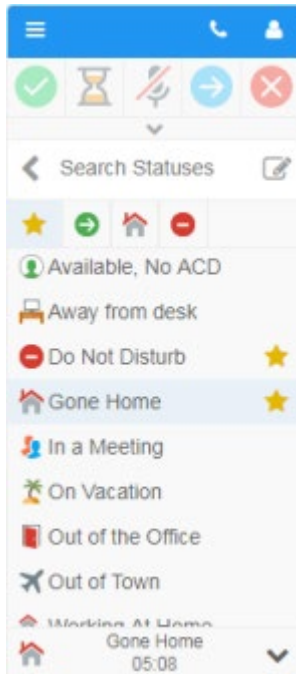


Set your status

PureConnect for Salesforce uses the same statuses as the CIC client. When you change your status in either PureConnect for Salesforce or the CIC client, your status automatically changes in the other application.

To change your status in PureConnect for Salesforce:

1. Click your status at the bottom of the CIC client pane.



2. Do one of the following:

- Select a status from the list.
- Type the name of the status in the Search Statuses text box and then select it from the list.
- Select one of your favorite statuses from the Favorite statuses bar above the list. For more information, see [Favorite Statuses](#).

If you log out of PureConnect for Salesforce and log back in, your status persists and is the same as when you logged out.

Additional status notes

Available, Forward

When setting this status, type the forwarding **Number** for all inbound calls. Add additional detail to your status in the **Notes** field. Other agents will see these notes when viewing your status from the CIC client Company directory.

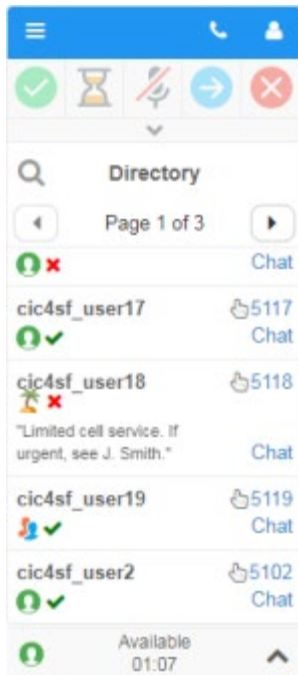
Interaction Dialer statuses

When you are logged in to an Interaction Dialer campaign, your [status](#) is restricted and automatically changes depending on your campaign call status.

View other agent statuses

You can view the status of any agent in your organization from the directory.

Note: A green **check mark** indicates the agent is logged in. A red **X** indicates the agent is logged out. Status notes, Until Date, and Until Time appear for certain statuses if agents specify this information when setting their status.



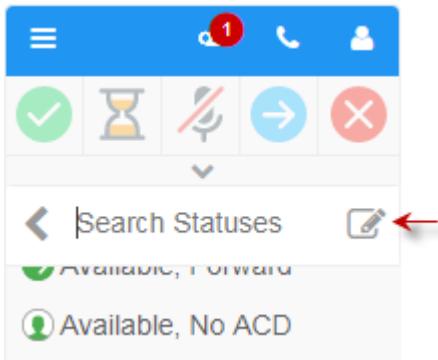
Tip: For more information about statuses, see the [CIC client help](#) in the CIC Documentation Library.

Set status notes and details

Depending on the status you select, you can set status details including status notes, forward number, and date and time you will become available. The date and time information you enter is played for all your incoming calls and displayed in the directory while in this status.

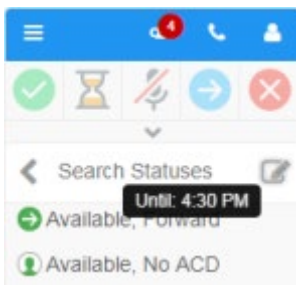
Note: Status detail information is required only for a Forward status which must have a Forward Number. If you do not enter status details, no dates or times are played for your incoming calls.

1. Click the drop-down arrow or status bar, and select a status.
2. Click the **Status Details** icon.

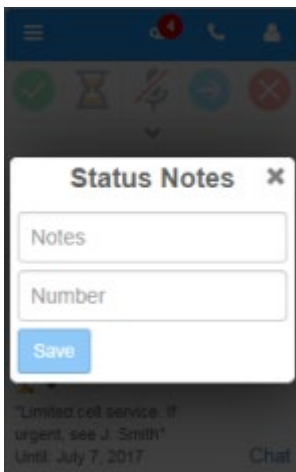


Note: For some statuses, the Status Notes dialog box appears automatically.

Tip: The tool tip for the Status Details icon shows your current status notes and details.



3. Complete the fields as described below:



- **Notes:** Enter any additional information on your current status.

As a convenience, the notes from the last time you selected this status appear. You can make any necessary changes to these notes.

Requirements: You need the **Status Notes** Security right in order to create or modify Status notes.

- **Forward Number:** This is enabled only for selected statuses such as Available, Forward. Enter a telephone number to which calls can be forwarded.

Note: The last forwarding number you used for this status defaults to the Forward Number box.

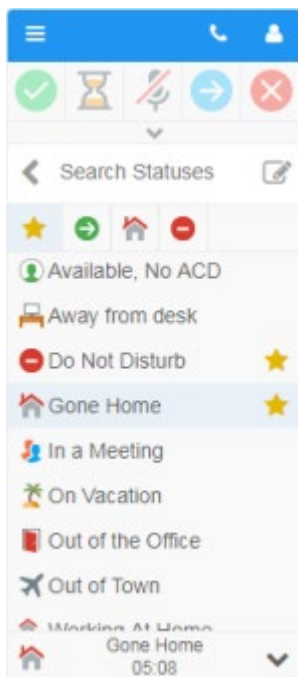
- **Until Date** and **Until Time:** Depending on the selected status, you may supply the date and time, until which you will be unavailable.
4. Do one of the following:
 - To save your status notes and details, click **Save**.
 - To discard your status notes and details, click **Close (X)**.

Favorite Statuses

You can designate selected statuses as favorites. Each status in the Status list has a Favorite status icon. When you hover over a status, this icon appears as a yellow star or blue outline star. A yellow star indicates a favorite status. Favorite statuses appear as buttons above the Status list.

To add or remove a Favorite status button:

1. In the My Status list, point to, but do not click, a status.



2. Do one of the following:
 - To add a Fast Status button, click the blue outline star.
 - To remove a Fast Status button, click the yellow star

Voicemail

Voicemail

Requirements: To receive voicemail messages, your CIC administrator must assign a Mail Box user to your User account in Interaction Administrator. Also to view voicemail messages in PureConnect

for Salesforce, your CIC administrator must assign you the **Receive Voicemail** Security right in Interaction Administrator. If you have this right, callers are sent to voicemail when you are in a DND status (Gone Home, Out of the Office, or some other "not available" status) or when you do not answer your telephone.

With PureConnect for Salesforce, any time a caller leaves a voicemail message for you, the voicemail message is attached to an email message and sent to you. You can open your voice mail messages as email message attachments or you can listen to voicemail from the **Voicemail view** in PureConnect for Salesforce.

Voice mail is managed in one of these ways:

- If Interaction Voicemail Player is installed on your workstation, when you open an email message that has a voice mail attachment, the CIC voice mail form opens and begins playing your voice mail message.

Note: For more information about configuration settings that affect this automatic playback, see [Interaction Voicemail Player Playback Settings](#) in the PureConnect CIC Documentation Library.

- If Interaction Voicemail Player is not installed on your workstation, you open the email message and double-click the voice mail attachment, then your designated audio player opens and begins playing your voice mail message.

Note: If your designated audio player does not play the voice mail message then it is likely that the required codec (software that compresses and decompresses digital audio) is not installed on your computer. Some recent operating systems no longer include the TrueSpeech codec. For more information, contact your CIC administrator.

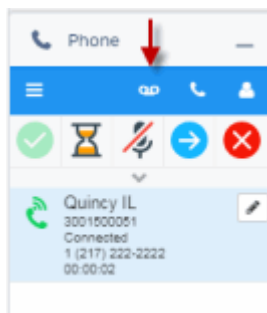
- You can use the Voicemail view to display and listen to voice mail messages.
- You can listen to and manage your voicemail messages by using the voice mail features on your telephone.

Note: For more information about the default TUI (Telephone User Interface), see the [Telephone User Interface User's Guide](#) and the [Telephone User Interface Quick Reference](#) available in the PureConnect CIC Documentation Library.

Voicemail button

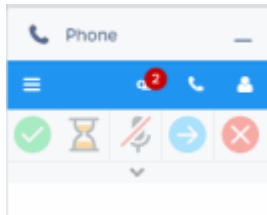
Requirements: This button appears only if your CIC administrator configures your User account appropriately. See [Voicemail](#).

Click the Voicemail button to display the Voicemail view.



Message Waiting Indicator

The Message Waiting Indicator (MWI) appears only when you have unheard voicemail messages. The number on the icon, also called a badge, indicates how many unheard message you have.

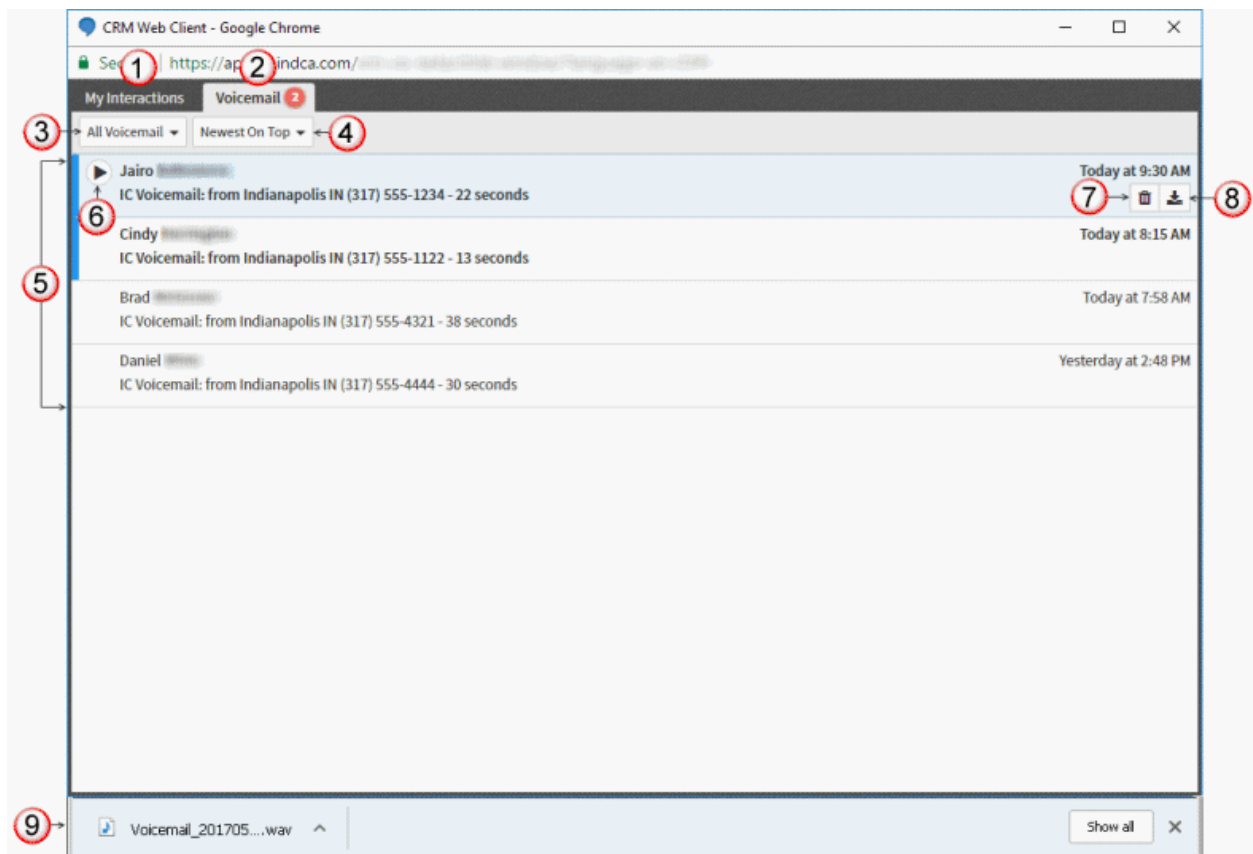


Voicemail view

The Voicemail view appears in a separate browser window when you click the Voicemail button. It displays a list of your current voicemail messages. You can use the integrated voicemail player to play back voicemail messages to your phone or delete old voicemail messages.

Voicemail View Features

This diagram illustrates the main features of the Voicemail view.

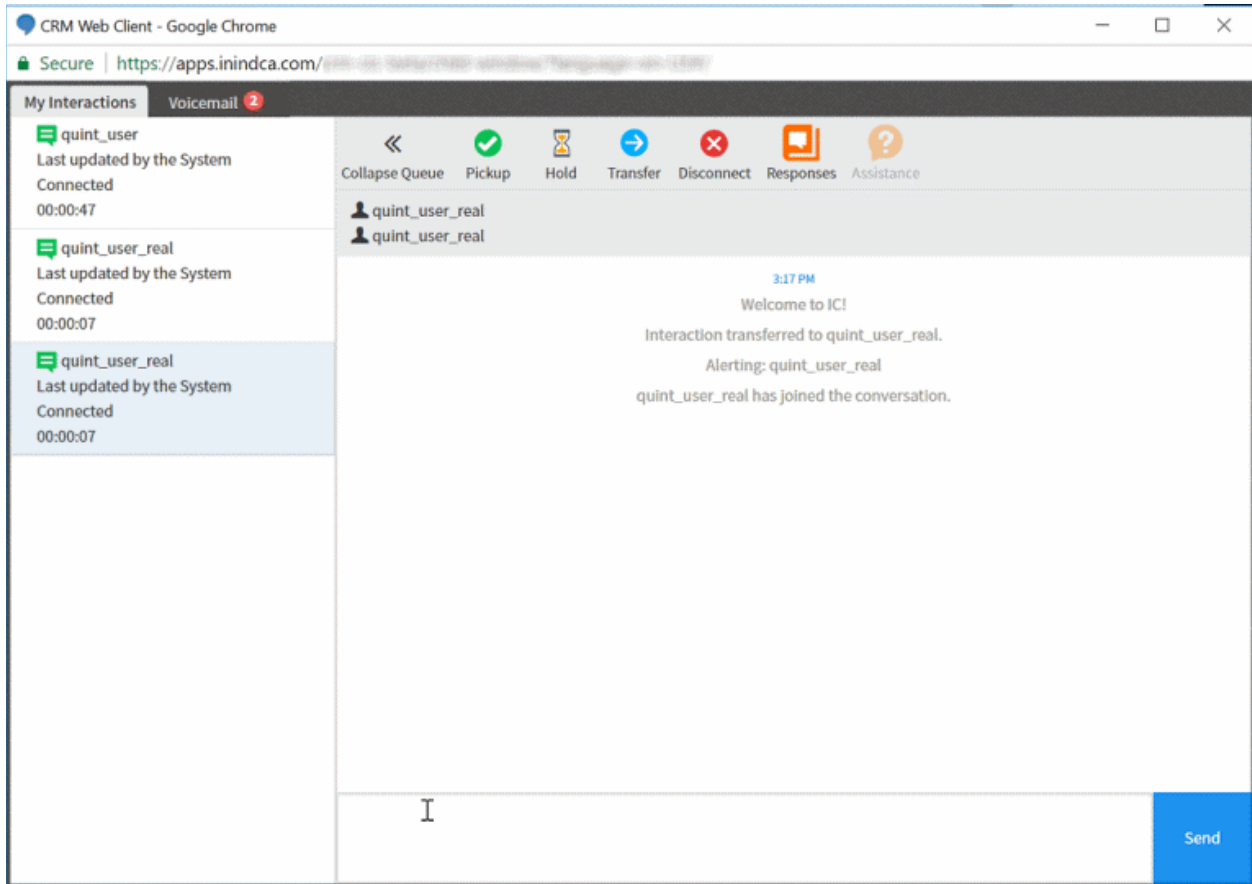


- 1 The My Interactions view also appears in the browser window. You can switch back to this view while managing voicemail messages and manage other currently connected interactions.

2	The number of unheard messages appears on the Voicemail tab.
3	<p>Select the type of voicemail messages to display in the Voicemail list:</p> <ul style="list-style-type: none"> • All Voicemail • Unopened Voicemail • Opened Voicemail
4	<p>Select a sorting option:</p> <ul style="list-style-type: none"> • Newest on top • Oldest on top
5	<p>The Voicemail View contains a list of voicemail messages you have not yet deleted, including both previously played and unheard voicemail messages. A vertical scroll bar appears if you have more voicemail messages than can be displayed at one time.</p> <p>Tip: A blue bar indicates an unheard message.</p> <p>Note: If your CIC administrator configures your user account to receive an email alert whenever you receive a voicemail message, then two entries appear for each voicemail message: a voicemail notification and the voicemail. You can select either the notification or the voicemail and click Play to listen to the voicemail.</p>
6	The currently selected voicemail message appears shaded. Click the Play control to listen to the currently selected voicemail message.
7	<p>Click the Delete control to delete the currently selected voicemail message.</p> <p>Tip: To delete multiple messages at the same time, press and hold the Ctrl key and select the messages, then click the Delete control.</p>
8	<p>Click the Download control to download the currently selected voicemail message as a WAV file to your workstation. Use your default audio player to playback the voicemail message.</p> <p>Note: If your designated audio player does not play the voicemail message then it is likely that the required codec (software that compresses and decompresses digital audio) is not installed on your computer. Some recent operating systems no longer include the TrueSpeech codec. For more information, contact your CIC administrator.</p>
9	Downloaded messages appear in your browser's File Download location. Click to play back the voicemail message in your default audio player.

My Interactions view

The My Interactions view appears in the same browser window as the Voicemail view. It provides a full set of controls for managing your current interactions while you are working with voicemail messages.



Playback messages in the Voicemail View

You can use the integrated voicemail player to play back voicemail messages to your phone (current station).

To playback voicemail messages:

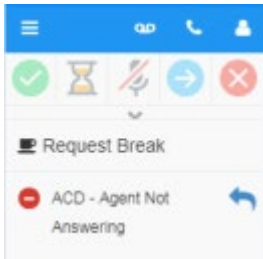
1. Select a voicemail message.
2. Do one of the following:
 - Click the Play control on the voicemail message.
Result: This plays back the message to your current station (phone).
 - Click the **Download** control on the voicemail message. Click the WAV filename in the File Download location in your browser.
Result: This plays back the message in your default audio player for WAV files.

Interaction Dialer campaigns

Agent statuses in Interaction Dialer

When you are logged in to Interaction Dialer, your status is restricted and automatically changes depending on your campaign call status. The following are the most common Interaction Dialer statuses:

- **Available:** You are logged in to Interaction Dialer but not on a call. Interaction Dialer can place new calls in your queue as soon as you are logged in to a campaign. Some agents may have access to regular CIC statuses while logged in to Interaction Dialer. Use the arrow to return to Available and begin receiving Dialer calls again.



- **Campaign Call:** You are connected to a call.
- **Follow Up:** You have disconnected from a call and need to select a disposition for it. The text for this status is configurable.

Tip: Make sure the Campaign Call and Follow Up statuses are configured as persistent statuses in CIC. Otherwise the agent’s status reverts to Available after a page refresh.

- **ACD – Not Answering:** You received a call on your queue but did not answer it.

To see your regular CIC statuses or to log out of CIC, you must first log out of Interaction Dialer. You also see your regular CIC statuses and cannot receive Interaction Dialer calls when you are on a break.

Note: Blended agents are able to access call controls and regular statuses for non-Interaction Dialer calls, based on the configuration of the agent and workgroups.

Log in to Dialer campaign in PureConnect for Salesforce

Once logged in to PureConnect for Salesforce, you must log in to an Interaction Dialer campaign(s). Each agent has specific user “rights,” configured in CIC, that determine how Interaction Dialer and PureConnect for Salesforce work. The *Logon Campaign* security right allows you choose which campaign(s) to log in to. If you do not have this right, you are automatically logged in to all running campaigns when you log in to Interaction Dialer. Master Administrator agents automatically inherit the Logon Campaign right.

Note: You may be automatically logged in to additional campaigns in the following scenarios. Messages at the bottom of the softphone tell you when you are logged in to additional campaigns:

- A supervisor logs the agent in to a specific campaign.
- A campaign that was stopped or paused resumes while the agent is logged in to Interaction Dialer. Only agents without the Logon Campaign right are automatically logged in to these campaigns.
- Campaign rules trigger the logon.

1. Click **Menu > Campaigns**.



2. If you have the Logon Campaign right, you can select which campaign(s) to log in to.
 - Click the toggle next to the name of the campaign(s) you want to log in to.
 - Click the toggle next to **All** to log in to all available campaigns.
3. If you do not have the Logon Campaign right, you are automatically logged in to all running campaigns.

As soon as you are logged in to one or more campaigns, Interaction Dialer sends you a call. Continue to [Place an outbound call.](#)

Place an outbound Interaction Dialer call

Placing calls in Interaction Dialer is simple. As soon as you are logged in to a campaign, Interaction Dialer does all of the work and starts placing calls for you.

1. Log in to Interaction Dialer and into at least one campaign.

The softphone starts placing calls for you immediately. As soon as a call is on your queue, your status changes to **Campaign Call**.

- In a predictive campaign, you are automatically connected to a call as soon as it is available. Salesforce screen pops a matching customer record or other page based on your screen pop settings.
- In a preview campaign, you see the call on your queue before it connects. Salesforce screen pops a matching customer record or other page based on your screen pop settings. After reviewing the contact information, you can place the call or skip it (if enabled). If the preview countdown is enabled, you have a pre-defined amount of time to place or skip the call before it is automatically placed.

Note: If the preview timer clock is not accurate, verify your local computer time is correct.

2. Disconnect the call.

Your status changes to **Follow Up**.

3. Select a disposition for the call before Interaction Dialer can place another call.

Schedule an Interaction Dialer callback in PureConnect for Salesforce

If the contact asks to be called back at a specific time and date and the campaign is configured to allow callbacks, you can schedule a callback where you specify the date and time when Interaction Dialer will call the contact back. From the agent's perspective, there is no difference between an incoming Interaction Dialer call that was scheduled and a normal campaign call.

1. When selecting a disposition for a call, select a disposition choice configured for callbacks, for example, **Schedule a Callback**.

The callback form appears.

2. If the caller is in a different time zone, as configured on the Interaction Dialer campaign, the callback form opens to the **Their Time** tab. If no time zone is configured for the campaign, the callback is scheduled in the agent's time zone.
3. In the date and time fields, indicate the date and time for the callback. This must be in the future.
4. Select **Me** or **Anyone** to determine whether the scheduled callback will be routed to you, or to any available agent. If this option is not available, the callback routes to any available agent.
5. Click **Submit**.

Request a break in Interaction Dialer in PureConnect for Salesforce

Interaction Dialer requires you to request a break before stepping away from a campaign. Interaction Dialer lets you go on break only after you stop receiving calls, disconnect from the last call in your queue, and select a disposition for it. When you are on break, your regular CIC statuses are available, and no new calls are placed in your queue.

Go on break

1. While on a call or after disconnecting from the current call, click the drop-down arrow in the upper-right corner.
2. Click **Request Break**.

Note: You can also request a break by going to **Menu > Campaigns**.

Because Interaction Dialer automatically places calls on your queue, there may be additional calls that you need to complete after you request a break.

As soon as Interaction Dialer stops placing calls on your queue, and the last call is disconnected and dispositioned, you see the “You are on break” message.

While on break

- Interaction Dialer does not place calls in your queue.
- You can select a more specific CIC status. For example, you can select At Lunch. Depending on the status that you select, non-Interaction Dialer calls may be routed to your phone.

Return from break

1. Click the drop-down arrow in the upper-right corner.
2. Click **End Break**.

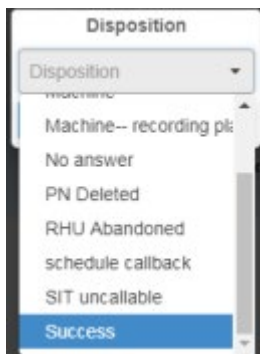
Your Interaction Dialer status changes to **Available**. Interaction Dialer starts placing calls again.

End an Interaction Dialer call in PureConnect for Salesforce

After you disconnect an Interaction Dialer call, you must select a disposition to end it completely and be available for the next call. A call can be dispositioned at any time during or after the call.

Note: You must select a disposition for the last call in your queue before you can take another call, go on break, or log out.

1. Click the Disposition icon, available to the right of the call in the interaction or call log view.



2. Click the disposition that best describes what happened on the call.

This list is configured on the campaign script in CIC.

Note: If you selected a disposition that automatically schedules a callback, see Schedule a callback for details.

3. Click **Submit**.
4. Your status changes to **Available**, and you are ready for the next Interaction Dialer call.

Note: If Interaction Dialer is not configured to automatically disconnect the call after it is dispositioned, you must manually disconnect before Interaction Dialer places the next call in your queue.

Log out of Interaction Dialer Campaign in PureConnect for Salesforce

You can request to log out of a campaign at any time. However, because Interaction Dialer automatically places calls in your queue, there may be one additional call that you need to complete before you can be logged off. You are logged off only after you have disconnected from the last call in your queue and selected a disposition for it.

Note: You may be automatically logged out of additional campaigns in the following scenarios. Messages at the bottom of the softphone tell you when you are logged out of additional campaigns:

- A supervisor logs the agent out of a specific campaign.
- A campaign the agent is logged in to is stopped.
- Campaign rules trigger the logout.

Note: You cannot log out of CIC while you are logged in to a campaign.

1. Click **Menu > Campaigns**.



2. If you have the *Campaign Logon* right, you can select which campaign(s) to log out of.
 - Click the toggle next to the name of the campaign(s) you want to log out of.
 - If logged in to all, click the toggle next to **All** to log out of all available campaigns.
3. If you do not have the *Campaign Logon* right, you are automatically logged out of all running campaigns and out of Interaction Dialer. Messages at the bottom of the softphone tell you when you are logged out of each campaign and out of Interaction Dialer.

✘	You logged out of Dialer.
✘	You logged out of Large Preview Campaign.

Note: You are not logged out of a campaign until you have ended the last call on your queue. Remember to [select a disposition](#) for the call to end it.

Troubleshoot Interaction Dialer in PureConnect for Salesforce

Call drops off the queue

If an Interaction Dialer server switchover occurs while on a campaign call, the call drops off of the queue and you are logged out of Interaction Dialer. However, the audio remains connected. The call log is saved to its final state before the switchover.

Cannot conference Interaction Dialer calls

You cannot conference Interaction Dialer calls. This action is prevented to ensure that a disposition is captured for each Interaction Dialer call

Other agent features

Search for an agent in PureConnect for Salesforce

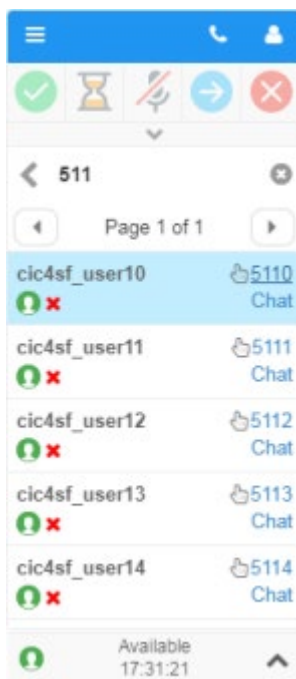
You search for and call any agent in your organization from the directory.

1. Go to **Menu > Directory**.

The full directory displays in a paged view, with the agent's status listed below the name.

Note: A green **check mark** indicates the agent is logged in. A red **X** indicates the agent is logged out.

2. Click the Search icon at the top of the Directory view.
3. Type the first few letters of a name or the beginning of an extension number.



4. To call the agent, click the extension number. Or to initiate an intercom chat, click **Chat**.

Request assistance

Requirements: The **Assistance** Interaction Command Right determines whether you can display the **Request Assistance** toolbar button. The **Request Assistance from Supervisors** Security right enables you to request assistance from your supervisor.

Sometimes you encounter an interaction for which you need assistance. For example, a caller could ask a question that you cannot answer. Or you are in the middle of a web chat when you need help from your supervisor. Or you want to ask a question before you respond to an ACD-routed email.

- You can request assistance only for ACD-routed interactions.
- You can have one active assistance request for each interaction.
- You can request assistance multiple times for the same interaction as long as any previous assistance requests are completed before you make a new request.

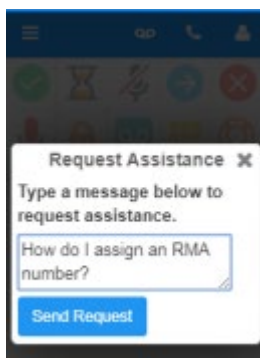
Workgroup Supervisors

Workgroup supervisors are configured in Interaction Administrator. Also, supervisors receive assistance requests only if they are running Interaction Supervisor or IC Business Manager. If supervisors are running only the CIC client, they do not receive assistance requests.

Note: At least one supervisor must be configured for your workgroup in Interaction Administrator and that supervisor must be logged on in order for the request assistance process to work properly.

Requesting Assistance

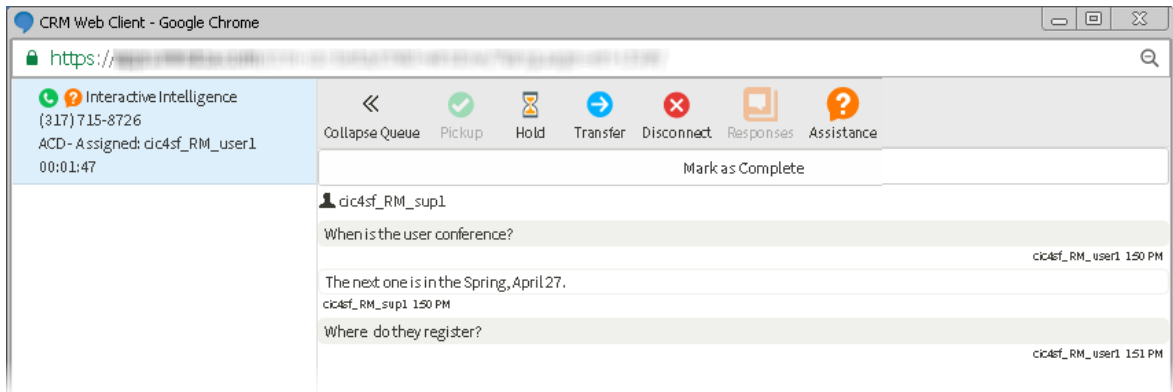
1. In the Interactions view, select the ACD-routed interaction for which you need help.
2. Do one of the following:
 - For calls and callbacks, click **Request Assistance** on the toolbar.
 - For webchats, click the **Assistance** button in the Chat window.
 - For email messages, click the **Assistance** button in the Email window.
3. In the Request Assistance dialog box, type a message to your supervisor and click **Send Request**.



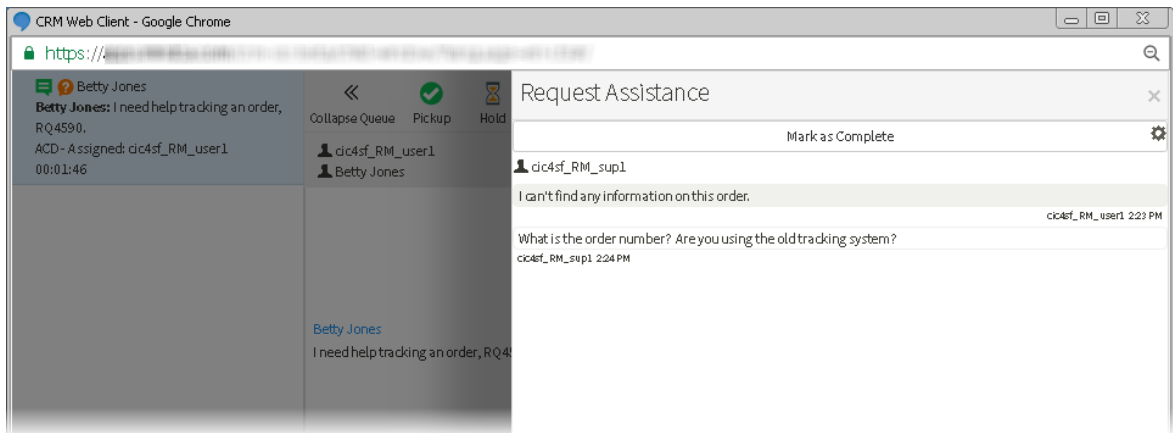
4. Conduct a conversation with your supervisor. For more information, see [Work with chats](#).

Calls and callbacks

PureConnect for Salesforce



Webchats and Email messages



Use keyboard shortcuts in PureConnect for Salesforce

A number of custom keyboard shortcuts are available in PureConnect for Salesforce to make navigating the softphone easier. In order to take advantage of them, ask your administrator to add the custom keyboard shortcuts to Salesforce. Once added, you can use shortcuts to do the following:

- Open/close the softphone
- Pick up an interaction
- Place an interaction on/off hold
- Mute/unmute an interaction
- Disconnect an interaction
- Set agent status to Available
- Open the dial pad
- Open the call log
- Open the interaction view

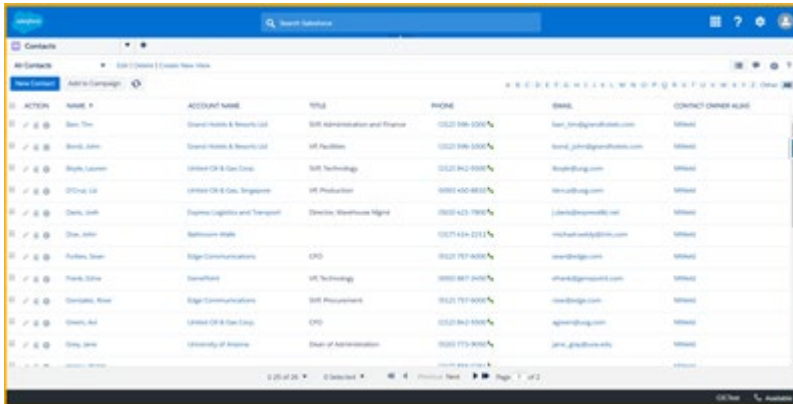
Note: These keyboard shortcuts only work when running Salesforce in Service Cloud® mode, where the softphone is a detachable overlay on the page.

This example uses a custom keyboard shortcut of 1, configured to open or close the softphone.

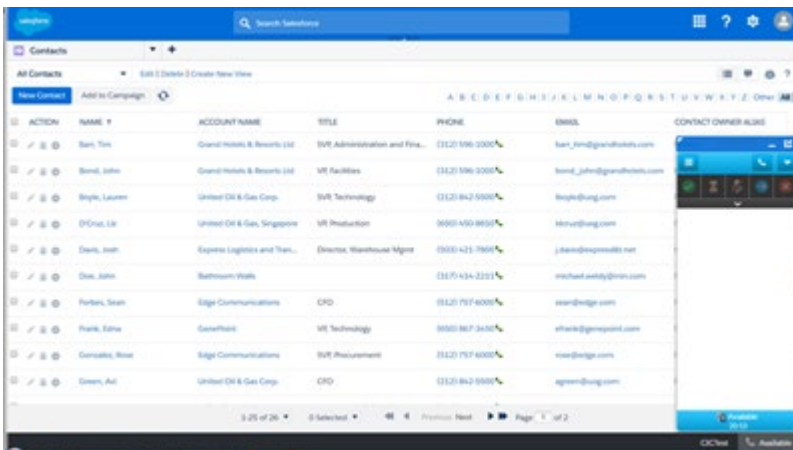
1. From any page of the Service Cloud® console, press **Esc** to activate keyboard shortcuts.

An orange border flashes around the border of the screen to indicate that the shortcuts are active.

Note: If your cursor is active on the softphone itself, keyboard shortcuts do not work.



2. Press **1** to open the softphone.



3. Press **Esc**, then **1** to close the softphone.

Log out of PureConnect for Salesforce

To log out of PureConnect for Salesforce:

1. Click the arrow at the top of the pane, or click your status at the bottom of the pane.
2. Select **Log out**.

Your status persists in PureConnect for Salesforce when you log out; when you log back in, your status is the same as when you logged out.

Note: If you log in to both PureConnect for Salesforce and the CIC client, when you log out of either one, you are not automatically logged out of the other. If you log out of the CIC client first, PureConnect for Salesforce loses your station information. You remain logged in to PureConnect for Salesforce but must log in to your station again in PureConnect for Salesforce.

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