IC Integration to Salesforce Desktop

Administrator's Guide

Interactive Intelligence Customer Interaction Center® (CIC)
Interaction Dialer®

2017 R4

Last updated April 25, 2017
(See Change log for summary of changes.)

Abstract

This administrator's guide describes the Customer Interaction Center integration with Salesforce and the Interaction Dialer plug-in.

Interactive Intelligence, Inc.
7601 Interactive Way
Indianapolis, IN 46278
Telephone/Fax (317) 872-3000
www.ININ.com

Copyright and trademark information

Table of contents

Chapter 1: Introduction to the IC Integration to Salesforce Desktop

About this document

This document describes the following:

- Overview of the IC Integration to Salesforce Desktop and the Interaction Dialer plug-in
- Installation of the integration software
- Setting up and configuring the call center and user records
- Customizing the soft phone and screen pops
- Creating Dialer campaigns for soft phone clients
- Troubleshooting

About the products

The 2015 R4 version of the IC Integration to Salesforce Desktop includes features and functionality of both the Salesforce Desktop integration and the CIC Dialer plug-in. In order to access to the Dialer features, you must have the appropriate license.

Users updating to the new version will be required to run .NET Framework 4.5.

About Salesforce Desktop

Salesforce Desktop provides a suite of services and applications for customer relationship management (CRM), ranging from sales force automation to partner management, marketing, and customer service.

About Interaction Dialer

Interaction Dialer automatically dials phone numbers for call center agents who are idle or waiting for calls. It uses a patented predictive algorithm and real-time statistical averaging to forecast when agents become available and balance the call volume among available agents.

About Customer Interaction Center

Customer Interaction Center is a suite of contact center applications with interactive voice response and IP/PBX capabilities.

The *CIC client* is the desktop management software or web version that comes with Customer Interaction Center. It provides users all the contact center functionality and IP PBX capabilities of Customer Interaction Center.

> **Note:** Customer Interaction Center (CIC) supports two interaction management client applications: Interaction Desktop and Interaction Connect. The IC Integration to Salesforce Desktop only works with Interaction Desktop. This documentation uses the term "CIC client" to refer to these applications.

Purpose of the IC Integration to Salesforce Desktop

The IC Integration to Salesforce Desktop provides Customer Interaction Center telephony and call control features to Salesforce Desktop users. The CIC features are available in a soft phone in Salesforce Desktop.
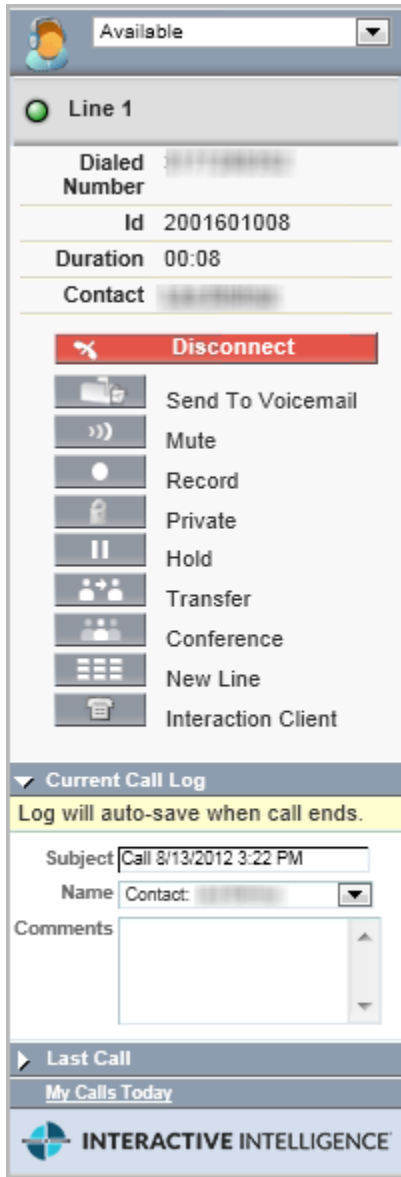
Customer Interaction Center user status — Available / Line 1

Call information — Dialed Number, Id 2001601008, Duration 00:08, Contact

Disconnect

Call control features:
- Send To Voicemail
- Mute
- Record
- Private
- Hold
- Transfer
- Conference
- New Line
- Interaction Client

Current Call Log — Log will auto-save when call ends.

Call log:
- Subject: Call 8/13/2012 3:22 PM
- Name: Contact:
- Comments

Last Call

My Calls Today

INTERACTIVE INTELLIGENCE

The soft phone appears in a sidebar in Salesforce.
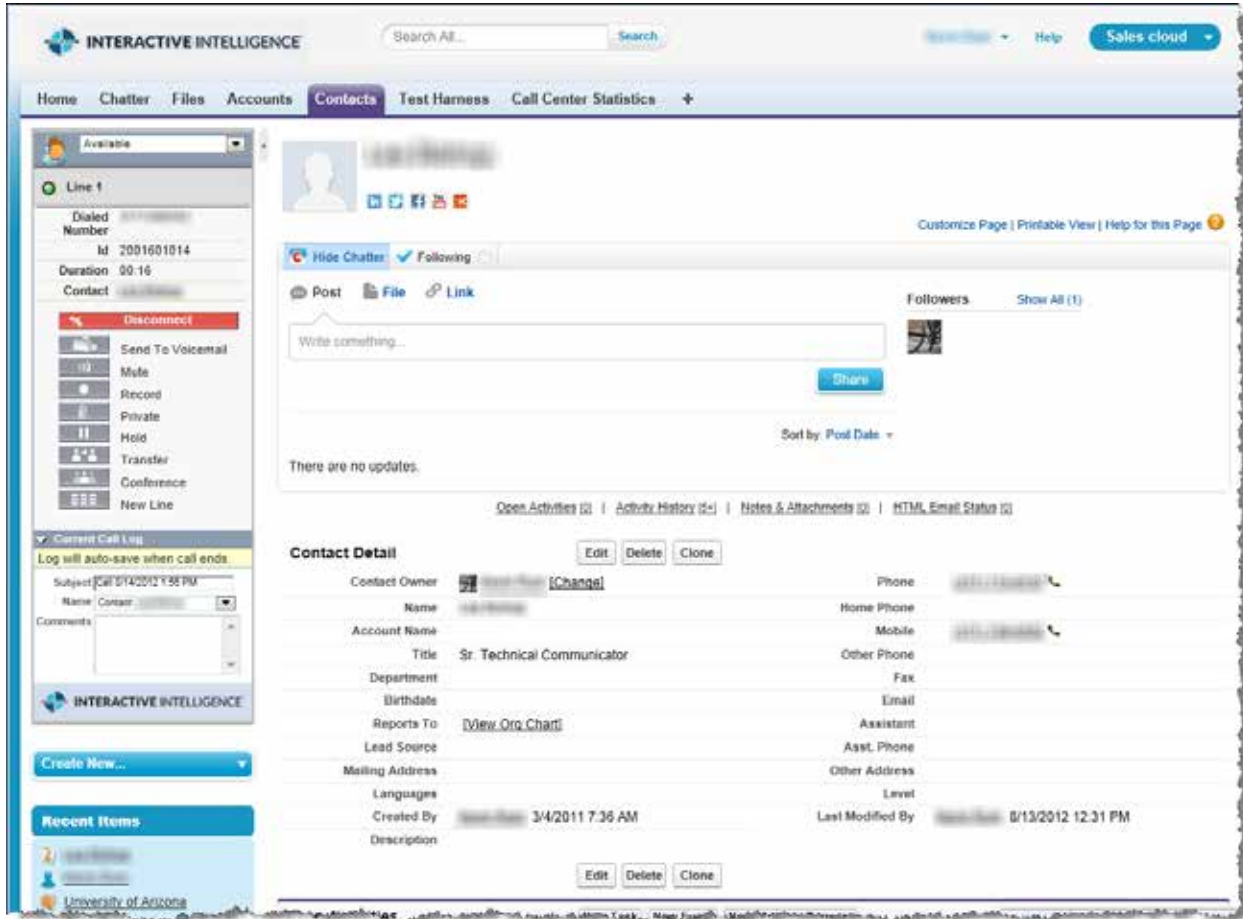
The integration's Help describes the available user features and is available from the menu that appears when you right-click the browser connector in the Windows notification area:
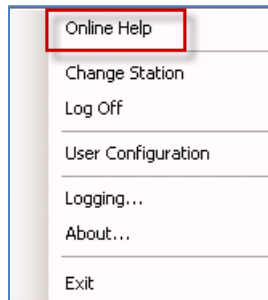
Components of the integration

The integration provides a CTI adapter, which is a software program that controls the appearance and behavior of the soft phone in Salesforce Desktop. The adapter acts as an intermediary between Customer Interaction Center, Salesforce Desktop, a Salesforce Desktop Call Center user, and Interaction Dialer. You can use CTI version 3.0 or 4.0.

Requirements

The integration requires the following:

· Customer Interaction Center 2015 R4. Refer to the *IC Installation and Configuration Guide* for Customer Interaction Center requirements.

· One of the TLS 1.1- or 1.2-compatible browsers:

Browser	Supported with CTI 3.0?	Supported with CTI 4.0?
Internet Explorer, version 9.0	Yes	Yes
Firefox (in a Windows-based operating system)	Yes, version 3.5.X	Yes, version 27 or later
Chrome, version 38 or later	No	Yes

Note: The integration does not support versions of Firefox earlier than 3.5.

When using Mozilla Firefox, install Firefox *before* you install the IC Integration to Salesforce Desktop. For more information, see Installation notes for Firefox users.

· Windows 7

· .NET Framework version 4.5 on the client machine where the integration is installed.

· Microsoft Core XML Services (MSXML) 4.0 SU 2, installed on the client machine. This software is included with Microsoft SQL Server 2005, Visual Studio 2005, and Windows Vista.

The IC Integration to Salesforce Desktop takes the place of the CIC client, so users are not required to install Interaction Desktop. However, the integration can also run side-by-side with the CIC client.

Resources

Several Salesforce Desktop development application notes are available on the Support site at: https://my.inin.com/products/pages/development-application-notes.aspx.

The application notes provide information for various customizations.

Multimedia routing

The integration supports the routing of these interaction types in addition to calls:

· Emails

· Web chats

· Callbacks

· Generic objects

Email interactions

The IC Integration to Salesforce Desktop manages and provides screen pops for incoming email interactions.

The following is an example of an email interaction:

Web Chat interactions

The integration manages and provides screen pops for web chat interactions.

The following is an example of a web chat interaction:

An agent can record a web chat or send it to voice mail.

Callback interactions

A callback interaction is one in which a caller makes a request to have their call returned. When the Integration to Interaction Dialer is installed, the request appears to the agent in a screen pop, with Callback as the interaction type:

After answering, the agent can click **Make Call** to return the call.

Generic object interactions

The integration can manage and display screen pops for other interactions using the Generic Object interaction type. For example, suppose your company needs to create a custom interaction type to handle issues that are escalated. You can set SF_InteractionType to "Escalated Issue" so the interaction type shows up as such in the soft phone:

Purpose of the Interaction Dialer plug-in for Salesforce Desktop

The Interaction Dialer plug-in for Salesforce Desktop adds the power of CIC's predictive dialer capabilities to automate sophisticated call campaigns in Salesforce Desktop.

Agents can log on to Interaction Dialer campaigns to receive calls through the Salesforce Desktop Adapter icon in the notification area. When an agent right-clicks the icon, a pop-up menu appears.
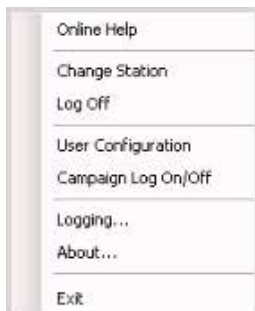
For each outbound call, call attributes and columns from the call list record appear in the soft phone to provide basic information about the contact. The integration can concurrently look up the contact in the Salesforce Desktop database and display the appropriate client record to the agent.

At the end of each call, the agent must enter a disposition for the call before taking another call.

During a campaign, an agent can also request a break. Interaction Dialer grants the break after it adjusts the pace of outbound dialing to compensate for a missing resource. When Interaction Dialer grants the break request, it notifies the agent and sets the agent's status to Unavailable. The agent can then request to end the break when he or she is ready to resume taking calls.

Administrators configure Dialer campaigns for soft phones through the Dialer Salesforce Desktop *Scripts* container in Interactive Administrator.
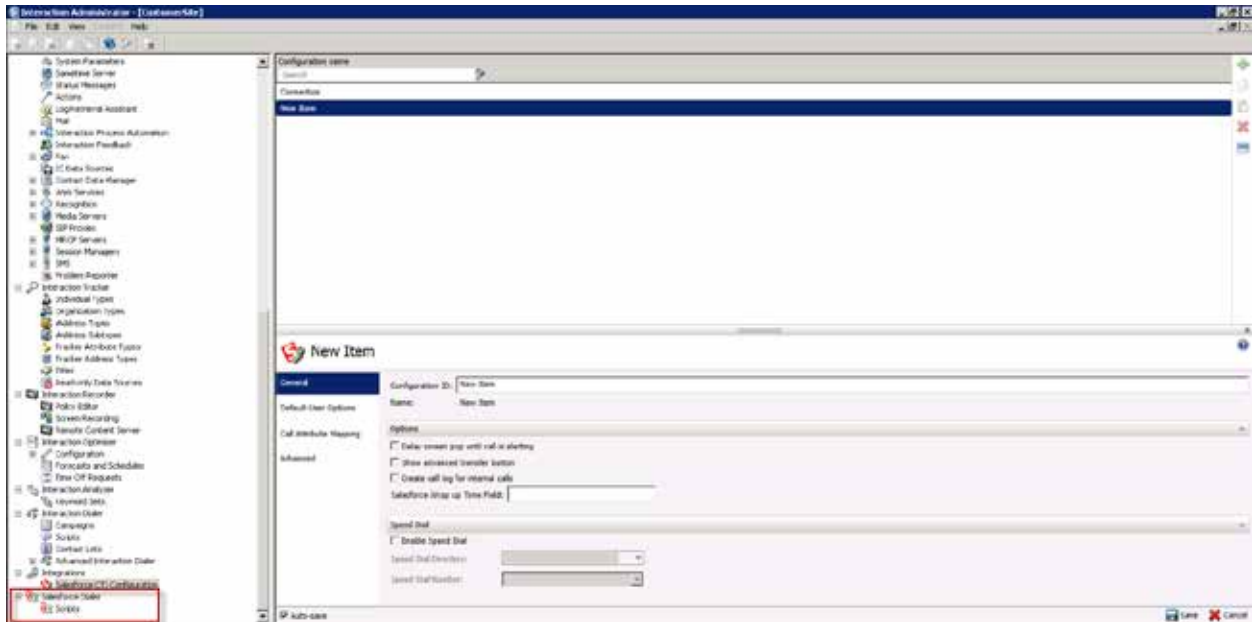
Components of the Dialer plug-in

The Dialer plug-in provides an additional container to run within a remote instance of Interaction in Administrator in IC Server Manager Apps. It allows Salesforce Desktop administrators the ability to control certain aspects of the scripts used by Dialer campaigns. For example, users can specify some user options and define the labels and fields that appear when agents place calls.

Requirements

·   Customer Interaction Center 2015 R4

·   Interaction Dialer 2015 R4

·   IC Server Manager Apps version 2015 R4 with the Dialer plug-in installed

Existing versions of workstation, client, and off-server components related to Dialer will be backward compatible with Dialer 2015 R4. This means that you can upgrade to Dialer 2015 R4 and expect that older versions of Dialer Plug-ins, Scripter .NET Client, and ICBM views will function normally. You can then upgrade those systems to their 2015 R4 counterparts at a later date.

> **Note:** Even though you can run different versions of clients, CCS, and ODS, this is only intended to ease the upgrade process and not intended to be a long term solution. We strongly encourage you to upgrade all Dialer and related components to 2015 R4 as soon as possible to ensure the best performance and to avoid any unnecessary problems.

Overview of administrative tasks

As the administrator, you are responsible for the following tasks, which are described in the chapters that follow:

- Run either the SalesforceIntegration_x64_2015_R4.msi or the SalesforceIntegration_x84_2015_R4.msi installation program on each client desktop.
- Create the call center record in Salesforce Desktop.
- Assign users to the call center and configure the users' button rights for the soft phone.
- Create custom call attributes for inbound calls, using data from Customer Interaction Center, Salesforce Desktop, or another database.
- Create custom screen pops to provide links to call-related information within Salesforce Desktop.
- Configure Dialer campaigns for soft phone clients.
- Troubleshoot problems using the log files.

Chapter 2: Installation

This chapter describes how to install the IC Integration to Salesforce Desktop.

Complete the installation tasks on each client machine. For more information, see this page on the Support website: https://my.inin.com/products/integrations/Pages/Salesforce-Desktop.aspx.

Before installing the integration

Before you install the integration, copy the installation file to a network folder that is accessible from the users' client machines.

If using Firefox, see Installation notes for Firefox users.

Install the integration

To install the integration on a client machine:

1. Double-click either the **SalesforceIntegration_x64_2015_R4.msi** file or the **SalesforceIntegration_x86_2015_R4.msi** file.

    The Windows Installer dialog box appears.

    The IC Integration with Salesforce.com Setup Wizard appears.

2. Click **Next** to continue.

The Custom Setup page of the Setup Wizard appears.
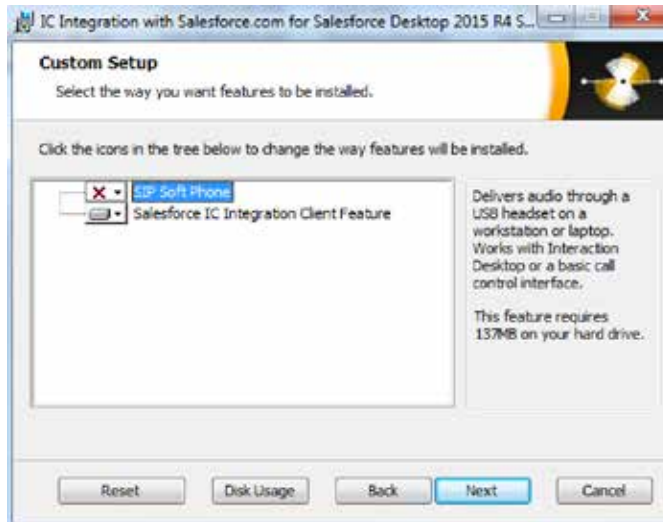
3. Is the user of this workstation using a USB headset?

    ·   If yes, and if the SIP soft phone is not installed, click the icon next to SIP
        Soft Phone and then select **Entire feature will be installed on local hard
        drive**.

    ·   Otherwise, click the icon next to Salesforce IC Integration Client Feature and
        then select how you want to install the files.

4. Click **Next** to continue.

    Select the Salesforce CTI version you use.
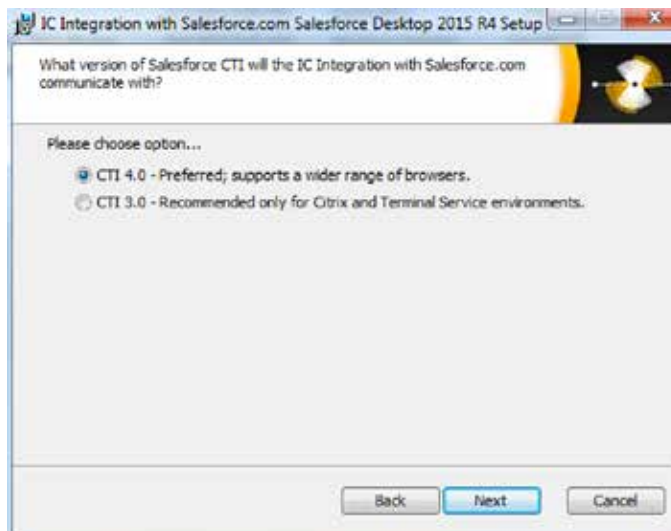
5. Click **Next** to continue.

The IC Server Name dialog box appears.

In the IC Server Name box, type the name of your Outbound Dialer Server (ODS).

6. Click **Next** to continue.

The Ready to install IC Integration with Salesforce.com dialog box appears.

7. Click **Install** to continue.

    The Installing Integration with Salesforce.com Setup dialog box appears.
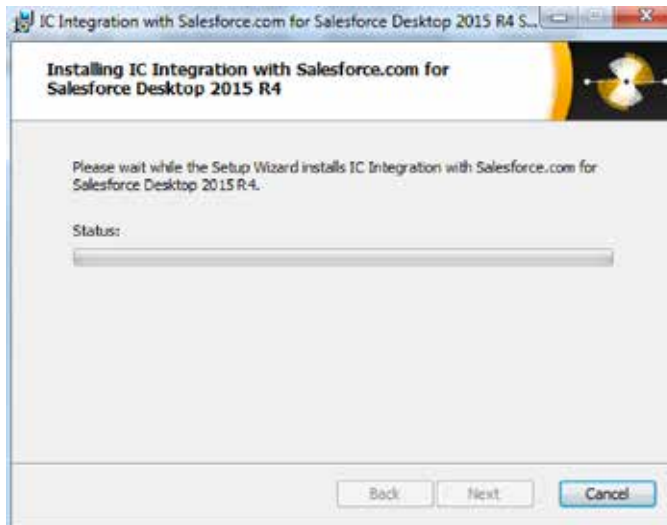
8. Wait while files are installed. The User Account Control dialog box appears.
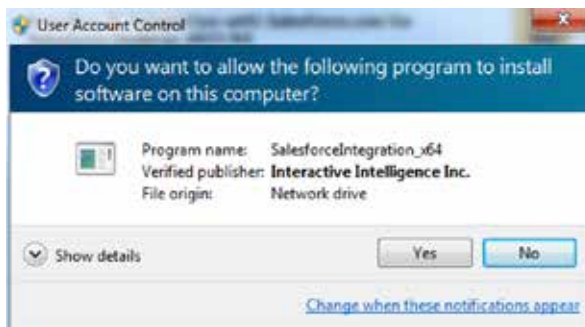
9. Click **Yes**.

    The Installing Integration with Salesforce.com Setup dialog box appears.
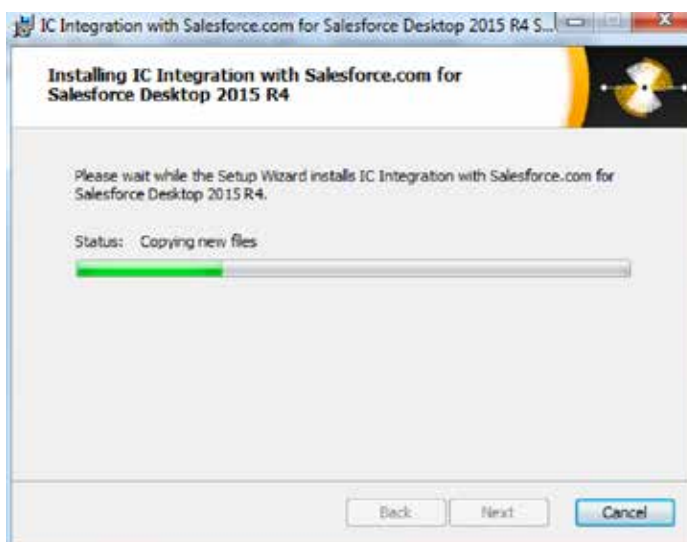
10. When the Completion dialog box appears, click **Finish**.

Perform a silent installation

You can perform a silent installation from a command line by running the client installation with the /qb switch. For example:

```
SalesforceIntegration_x64_2015_R4.msi /qb
```

Performing a silent installation does not modify behavior of the plug-ins for IC Server Manager Apps.

Installation notes for Firefox users

This section lists special installation instructions for Firefox users.

Turn off Firefox's new mixed content blocker

In Firefox version 23 and later, there is a new mixed content blocker that automatically blocks content from non-secure sources and secure (https) pages. A user can choose to view the content from these sources. However, the mixed content blocker requires users to choose to view the mixed content every time they try to view it.

To permanently disable the mixed content blocker:

1. In the Firefox address bar, type **about:config** and press the **Enter** key. The This might void your warranty page appears.

2. Click the **I'll be careful, I promise!** button.

3. In the Search box, type **block_active.** Press the **Enter** key.

4. Double-click the block_active entry to set its value to false.

What to do if you didn't install Firefox before the integration

If you plan to use Mozilla Firefox version 3.5 or 3.6, install it before you install the integration. The installation detects which browser you are using and installs the appropriate files.

However, if you did not install Firefox before installing the integration, you can repair the integration files afterwards.

To repair the installation when using Firefox version 3.5 or 3.6:

1. Click **Start**, click **Control Panel**, and then click **Add or Remove Programs**.

2. Select the **Show updates** check box.

3. From the list of currently installed programs and updates, select **IC Integration with SalesForce.com**.

4. Click **Change to start the IC Integration with Salesforce Desktop Setup Wizard**.

5. Click **Next**.

6. Click **Repair**.

7. Specify the IC server name when prompted, and then click **Next**.

8. Click **Repair on the Ready to Repair** dialog box to start the repair.

Install the Salesforce CTI Extension

If you are using Firefox version 3.6 with Salesforce CTI 4.0, you are prompted to install the Salesforce CTI extension for Firefox the first time you start Firefox after installing an update.
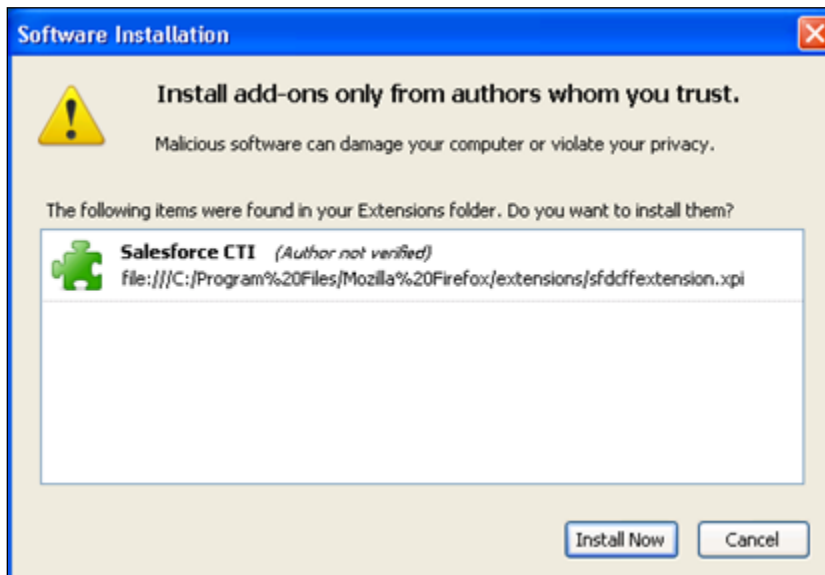
To install the extension, click **Install Now**. When the installation is complete, the Firefox Add-ons dialog box appears and indicates that the Salesforce CTI is installed.

Note: The extension is not required for CTI version 4.0.1 and higher.

Start Firefox the first time with the 3.0 CTI

If you are using the Salesforce 3.0 CTI with Firefox and Windows 7 32-bit, follow these instructions one time following installation to start the integration:

1.   Run Firefox as an administrator.

2.   Exit the Salesforce 3.0 CTI.

3.   Start both Firefox and the Salesforce CTI as an administrator.

The integration is now started and you can use the integration without being an administrator.

Chapter 3: Configure the Salesforce CTI

This chapter describes the administrative tasks that are required to configure the Salesforce CTI. You can perform these tasks in Interaction Administrator on the IC server.

Open the Salesforce CTI configuration in Interaction Administrator

To open the configuration settings for the Salesforce CTI:

1. In Interaction Administrator, open the **Integrations** container.
2. Under the Integrations container, click **Salesforce CTI Configuration**.

    If there are existing CTI configurations, they appear in a list. If there are no existing configurations, the workspace appears as follows:
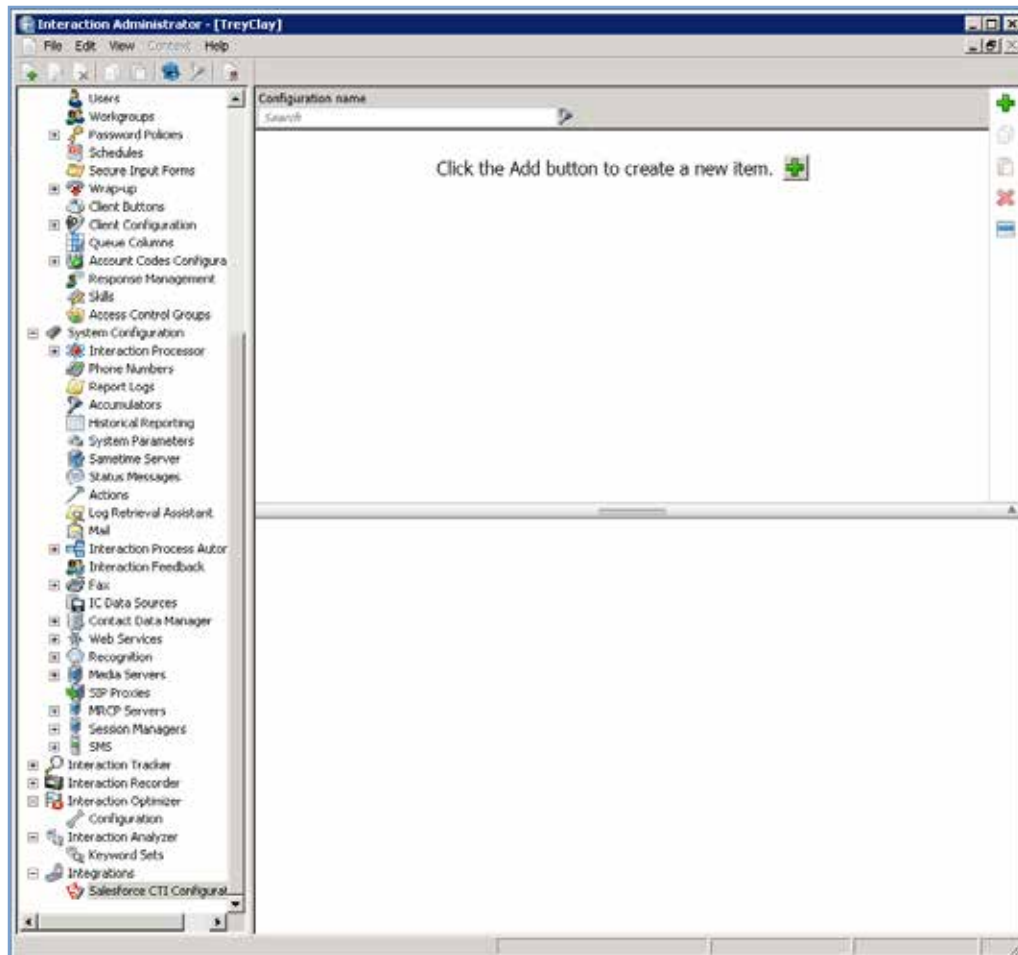
You can do any of the following:

- Add a configuration item
- Search for a configuration item
- Delete a configuration item
- Export a configuration item to the Clipboard

Add a new configuration Item

You can have multiple configuration items. For example, if your organization has multiple business units, you can define a configuration for each business unit.

You can assign an Interaction Administrator configuration to a Call Center configuration in Salesforce.

To add a configuration item:

1. Under Salesforce CTI Configuration in Interaction Administrator, click the green **Add a new item** icon.

   The New Item pane appears.

2. In the Configuration ID box, specify a name for the configuration item.

3. Specify the configuration settings as described in the following sections, and then click **Save**.

Configure general settings

On the General Settings tab, you can configure speed dialing and some additional options. These options are global; they affect the behavior of the features for all users. Users cannot modify these settings.

Options

To configure the options on the General Settings tab:

1. How do you want to display screen pops for inbound interactions?

   - To display a screen pop when the interaction is alerting, select the **Delay screen pop until call is alerting** check box.

   - To display a screen pop when the interaction is added to the agent's queue, clear the check box.

2. Do you want to allow the agent to perform advanced transfer functions? For more information about the advanced transfer feature, see the IC Integration to Salesforce Desktop Help or information about consult transfers in the Interaction Desktop Help.

   - If yes, then select the **Show advanced transfer** button check box.

   - If no, skip to the next step.

3. By default, call logging occurs for external calls only. External calls include both inbound and outbound calls. You can optionally enable more call logging for internal calls.

   - If yes, select the **Create call log for internal calls** check box. If you select this option, call logging is enabled for both internal and external calls.

   - If no, skip to the next step. If you select this option, call logging is enabled for external calls only.

4. In the Salesforce Wrap up Time Field box, specify the field where you want to store the wrap-up time in the Salesforce activity once an interaction log is complete. The time period starts when an interaction ends and ends when the agent status is set to something other than an after-call work (Follow Up) status.

Speed dial options

Speed dialing allows users to make quick calls to contacts in the associated directory. To configure the speed dial options:

1. Under Speed Dial, select the **Enable Speed Dial** check box. This adds a Speed Dial button to the soft phone.

2. From the Speed Dial Directory list, select the workgroups, specific agents, or private contacts to use for speed dialing. The directory must be a Customer Interaction Center data source that is set up in Interaction Administrator. The most commonly used contact list is the Company Directory.

3. From the Speed Dial Number list, select the type of phone number (extension, home phone, business phone, or mobile phone) to display by specifying the related database column.

> **Note:** If you are using CIC 2015 with Salesforce CTI 4.0, there must be a display name set in the user configuration in IA on the Personal Info tab. If there is no display name, the Speed Dial button does not appear in the soft phone.

Configure default user options

You can configure default settings for certain user options in the integration. As the administrator, you set the defaults to use the first time a user logs on. Each user can then set their own options after they log in.

The user options appear on the Default User Options tab.
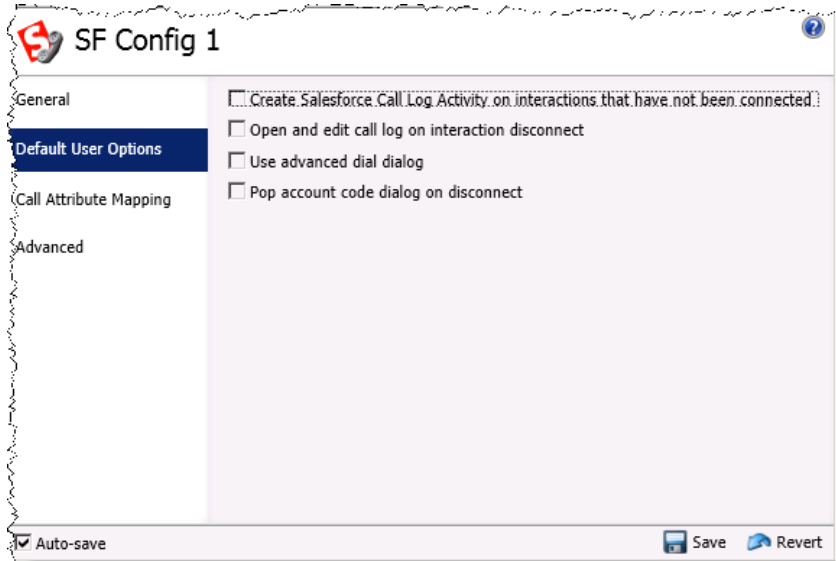
To configure the default options:

1. To make an entry in the call log for missed inbound interactions or attempted outbound interactions that are never connected, select the **Create Salesforce Call Log Activity on interactions that have not been connected** check box. For example, an entry would be logged if a call was placed and nobody answered.

2. To have information in the Current Call Log section of the soft phone move to the Last Calls section upon disconnection, select the **Open and edit call log on interaction disconnect** check box. The information remains open for editing.

3. To display the Advanced Dial dialog box when an agent initiates a call, select the **Use advanced dial dialog box** check box. This dialog box requires the user to assign an account code and provides the option to assign an ACD workgroup. For more information about advanced dialing options, see the Interaction Desktop Help.

   > **Note:** To make this option useful, enable account codes in Interaction Administrator. For more information about using account codes, see the Interaction Administrator Help.

4. To display the Account Code dialog box whenever an inbound call is disconnected and the agent has not yet assigned an account code, select the **Pop account code dialog box on disconnect** check box. In the integration, this dialog box is the agent's last chance to enter an account code.

Call attribute mapping

Mapping call attributes is a way to customize the list of attributes that appear in the soft phone for inbound calls. For information about call attribute mapping, see Configure synchronization of attributes with the call log.

Advanced options

On the Advanced Options tab, you can do the following:

- Add custom attributes so you can reference your own variables and settings through the IceLib interface.

- View and enter information about changes to the Interaction Administrator configuration for the Salesforce Desktop integration.

These options are the same options that are available in Interaction Administrator for other configuration items; they are not related to the Salesforce Desktop integration. For more information about these options, see the Interaction Administrator Help.

Chapter 4: Set up a call center

This chapter describes how to set up a Salesforce Call Center record for the IC Integration to Salesforce Desktop. Then you assign Salesforce Desktop users to that Call Center record so they can use Salesforce Call Center features.

> **Note:** Many of the following configuration tasks require that you have certain permissions before you can perform those tasks. For a list of the required permissions, click the Salesforce **Help** link on the related dialog box.

Open the Call Center page

You set up the Salesforce call center record for the CIC Integration on the Call Center page.

To open the Call Center page:

1. In Salesforce, click the down arrow next to the user name to display the User menu.

2. On the User menu, click **Setup**.
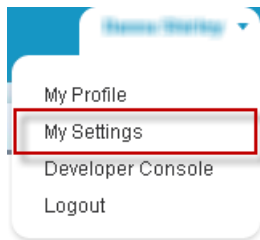
3. Click **App & Administration Setup**.
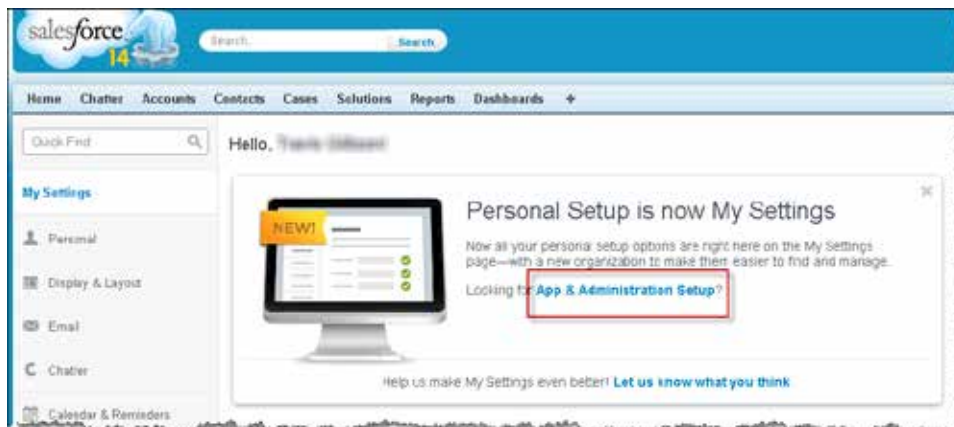
4. Expand the **Customize** container and click **Call Center**.

   The current list of call center records appears on the Call Center page.

Call Center

- Manage call centers
- Manage directory numbers
- Customize SoftPhone layouts

Getting Started

- Getting Started with Setting Up Call Centers

5. Continue with one of the following configuration procedures.

Import the definition file

To set up the Salesforce call center record, import the definition file provided with the installation. After importing the file, you can assign users to the call center.

To set up the call center record using the definition file for the IC Integration to Salesforce Desktop:

1. Go to the All Call Centers setup page. For more information, see Open the Call Center page.

2. Click **Import**.

3. In the Call Center Definition File browse, click **Browse** to locate one of these files:

    · ICIntegrationWithSalesforceDefinition_CTI40.xml if you are using CTI 4.0

    · ICIntegrationWithSalesforceDefinition_CTI30.xml if you are using CTI 3.0

    > **Note:** You can download the definition files from the Support website at:
    > https://my.inin.com/products/integrations/Pages/Salesforce-Desktop.aspx.

4. Click **Open**.

5. Click **Import** to begin importing the definition.

6. To display the call center detail, click **Edit** next to the name of the new call center.

    To assign users to the call center, continue to the next section.

Configure the CTI file

To assign users to the new call center:

1. Start with the Interactive Intelligence Salesforce Connector Call Center Edit page displayed

2. Under Configuration Options, in the CTI Configuration Name box, type the Configuration ID you specified when you created the configuration item.

3. Click **Save**.

   For more information, see the Salesforce Desktop Help.

Configure button rights for users

You can configure the buttons that appear on the soft phone in Salesforce Desktop by assigning button display rights for a user, role, or workgroup in Interaction Administrator.
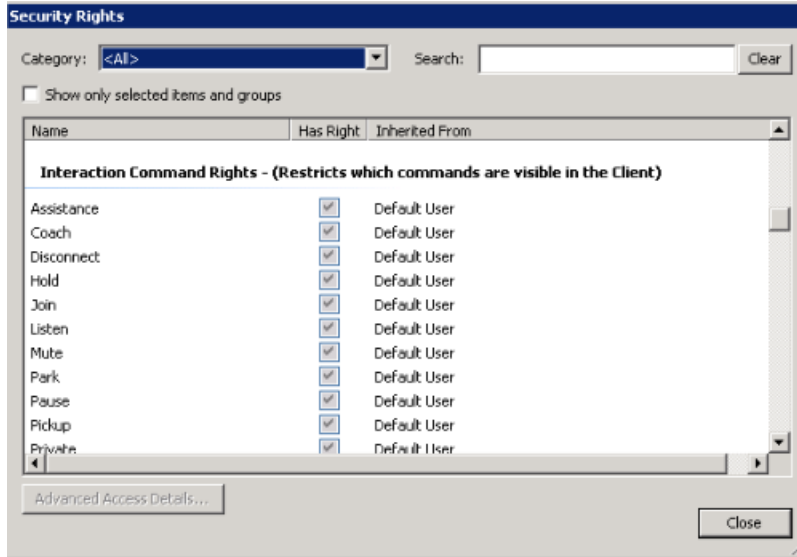
For example, in order for the Mute button to appear in the soft phone, the user or the user's workgroup must have the Mute security right. You select this right in the Security Rights section of the Security tab in Interaction Administrator.

For more information about button display rights, see the Interaction Administrator Help.

Configure synchronization of attributes with the call log

You can store and synchronize any interaction attributes from the Salesforce call log for inbound and outbound interactions. If call attributes change, even after disconnection, the data remains in sync between the interaction and the call log.

To synchronize attributes, first, create the activity custom field in Salesforce Desktop and then map the CIC attribute to it. The following the sections provide more details.

The following table lists the fields that the integration automatically fills out for every interaction that an agent handles.

Field	Description
ActivityDate	Date/time when the call ended
Subject	This information appears in the call log and defaults to: <Interaction Type> <Date Time>
Type	Interaction type (Call, Email, Chat, and so on)
CallDurationInSeconds	Time of interaction
CallType	Direction (internal, inbound, or outbound)
CallObject	The CIC client call ID key for the interaction
OwnerId	The agent who handled the interaction
Status	Closed or Completed
Description	Comments that are filled out in the call log

Note: Additional fields are mapped in the Automatic Field Synchronization table within the Salesforce Call Center definition. For more information about these mappings, see the Salesforce Desktop documentation.

Create custom fields in Salesforce Desktop

To create an activity custom field in Salesforce Desktop, so that you can map it to a Customer Interaction Center attribute:

1. In Salesforce Desktop, click the down arrow next to the user name to display the User menu.

2. On the User menu, click **Setup**.

3. In the navigation panel on the left side of the screen, expand the **Build** node under App Setup, and then expand the **Activities** node.
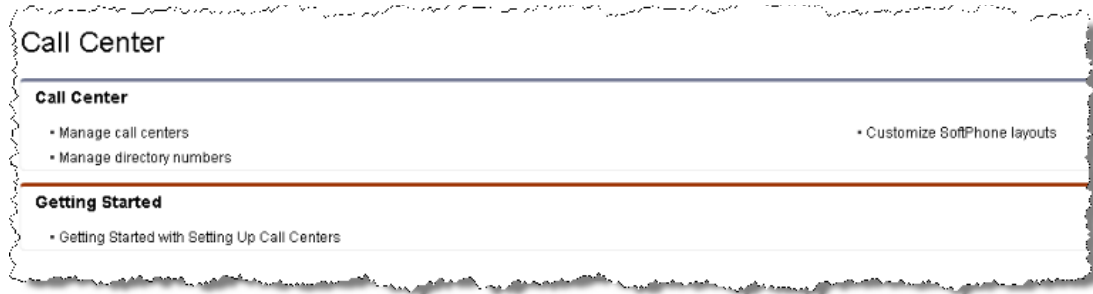
4. Under Activities, click **Activity Custom Fields**.

5. In the workspace, under Activity Custom Fields, click **New.**

6. Under Step 1. Choose the field type, select the appropriate data type for the custom field, and then click **Next**.

Activity
New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

○ None Selected	Select one of the data ty
○ Auto Number	A system-generated seq incremented for each new
○ Formula	A read-only field that der any of the source fields c
○ Roll-Up Summary ⓘ	A read-only field that disp of all records listed in a re
○ Checkbox	Allows users to select a ⟨
○ Currency	Allows users to enter a do This can be useful if you ⟨
○ Date	Allows users to enter a d⟨
○ Date/Time	Allows users to enter a d⟨ that date and the current ⟨
○ Email	Allows users to enter an ⟨ contact or lead, users ca⟨ cannot be used for mass ⟨
○ Number	Allows users to enter any
○ Percent	Allows users to enter a p⟨ number.
○ Phone	Allows users to enter any
○ Picklist	Allows users to select a v
○ Picklist (Multi-Select)	Allows users to select mu
⦿ Text	Allows users to enter any
	Allows users to enter up ⟨

7. Under Step 2. Enter the details, specify the field label, length, name, and description, select the **External ID** check box, and then click **Next**.

Step 2. Enter the details   Step 2 ⟨

                                                    Previous | Next | C⟨

Field Label	Workgroup Name ⓘ
	Please enter the maximum length for a text field below.
Length	255
Field Name	Workgroup ⓘ
Description	Interaction Center Workgroup name
Help Text	
Required	☐ Always require a value in this field in order to save a record
Unique	☐ Do not allow duplicate values
	⦿ Treat "ABC" and "abc" as duplicate values (case insensitive)
	○ Treat "ABC" and "abc" as different values (case sensitive)
External ID	☑ Set this field as the unique record identifier from an external system
Default Value	Show Formula Editor
	Use formula syntax: e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

8. Under Step 3. Establish field-level security, specify whether the field should be visible or read-only for each of the profiles listed, and then click **Next**.

9. Under Step 4. Add to page layouts, specify where to display the field on the page, and then click **Save**. The Activity Custom Fields list appears.

10. In the Activity Custom Fields list, click the name of the field you just added.

    The Custom Field Definition Detail information appears.

11. Record the value that appears in the API Name box.

    To map the custom field to a CIC attribute, continue with the next section.

Map a custom field to a Customer Interaction Center attribute

To map a custom field to a Customer Interaction Center attribute:

1. In Interaction Administrator, expand the integrations container, and then click **Salesforce CTI Configuration**.

2. Select the appropriate configuration item, if it exists, or add a configuration item. For more information, see Add a new configuration item.

3. In the configuration, click the **Call Attribute Mapping** tab.

4. Click the green plus sign.

5. In the Salesforce box, specify the name of the CIC attribute.

6. In the Interaction attribute box, specify the value from the API name you recorded in the previous section.

7. Select the appropriate check box, as described in the following table:

Check box	Description
Inbound	To synchronize the attributes for inbound attributes, select this check box.
Outbound	To synchronize the attributes for outbound attributes, select this check box.
Is date time	If the field is a Date Time attribute, select this check box.

The following graphic shows a successful mapping.
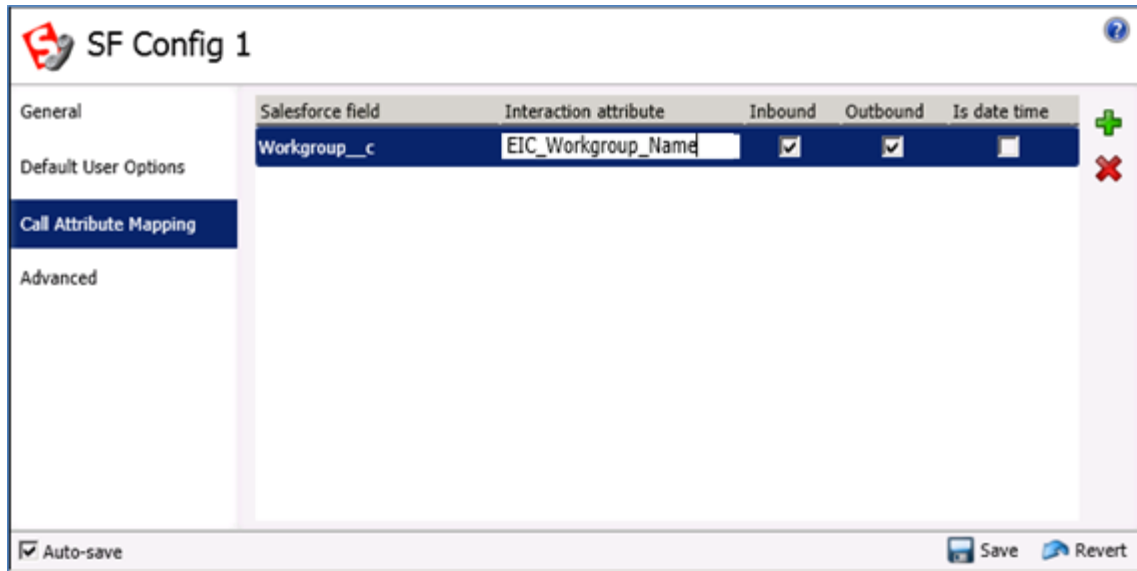
8.   Map another attribute, or click **Save**.

Chapter 5: Create custom call attributes

You can customize the list of attributes that appear in the soft phone for inbound calls.

By default, the integration displays the following attributes:

· Caller ID

· Dialed Number

· ID

· Contact (if known)

· Title for Contact (if known)

You can display other data stored in Customer Interaction Center to the Salesforce Desktop. For example, you could display the subject of the call (Calling About) and the level of support (Level).
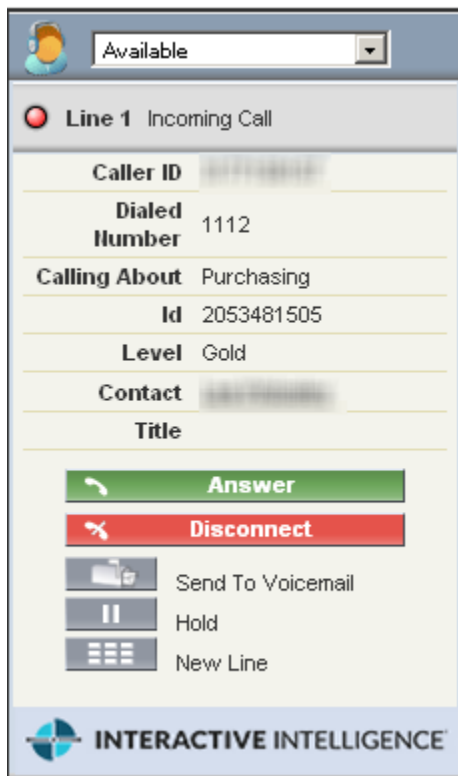
To create a custom label, set the SF_LabelNames attribute to the label name that you want to appear in the soft phone. For example, the name of the custom attribute would be SF_LabelNames and the value associated with that attribute would be "Calling About." Then, assign a value to the SF_LabelValues attribute to indicate the possible values for the custom attribute. For example, the possible options for the "Calling About" attribute would be Information, Purchasing, Return, and Billing. You can specify all of those options in the same Value field, separated by a pipe ("|").

For more information about attributes, see [Interaction attribute usage](#).

Methods for creating custom attributes

To configure the list of attributes, you can create custom attributes in any of the following applications:

- Interaction Attendant
- Interaction Designer

The following sections include examples from each of these applications.

Create custom attributes in Interaction Attendant

In Interaction Attendant, you can use the Set Attribute tool to set the SF_LabelNames and SF_LabelValues attributes. The following sections describe how to set the attributes. For more information, refer to the Interaction Attendant documentation.

Set SF_LabelNames

Specify the names of the new labels to display in the Value field for the SF_LabelNames attribute. Separate multiple text labels with a pipe ("|"):

Set SF_LabelValues

Set the SF_LabelValues attribute to the values that will appear next to the labels, separating multiple values with a pipe ("|"):

Create custom attributes in Interaction Designer

You can also use the Set Attribute tool in Interaction Designer to customize the list of attributes that appear in the CIC client for an inbound call.

The following sections describe how to set the attributes. For more information about using tools to set attributes, see the Interaction Designer Help.
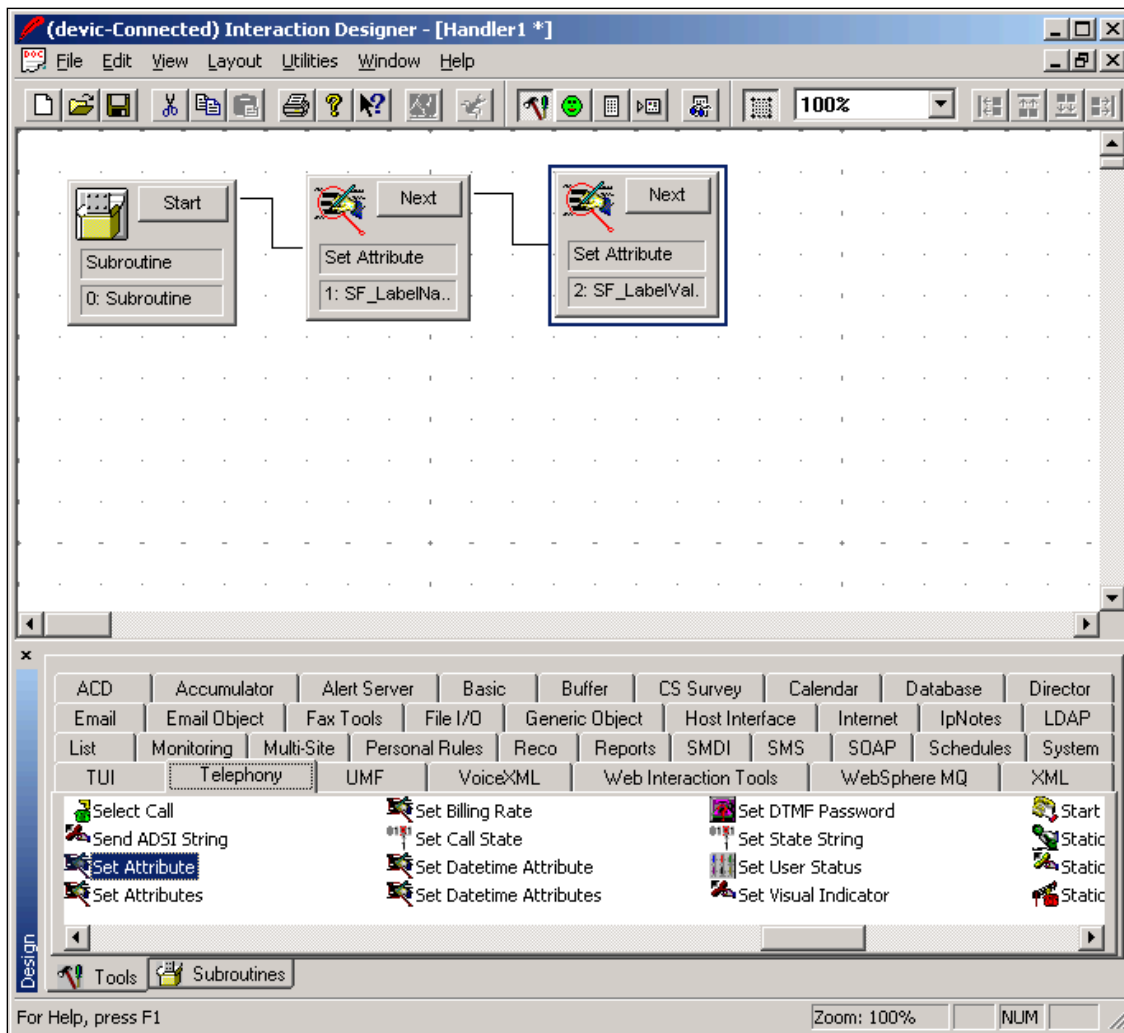
Note: If you write a custom handler to set a date/time value on the interaction, use the Set Date/Time Attribute toolstep to set the date/time. Otherwise, synchronization does work properly. If you use an out-of-the-box call attribute, such as Eic_CallInitiationTime, it is already stored on the interaction as a Date/Time attribute type.

Set SF_LabelNames

Set the properties for SF_LabelNames as in this example:
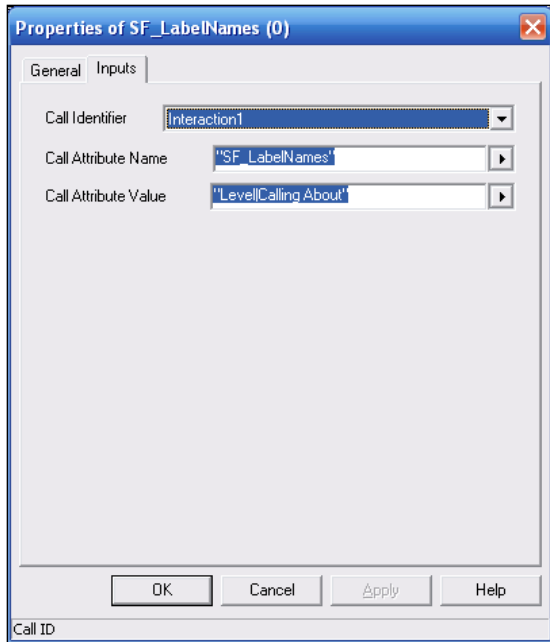
Set SF_LabelValues

Set the properties for SF_LabelValues as in this example:
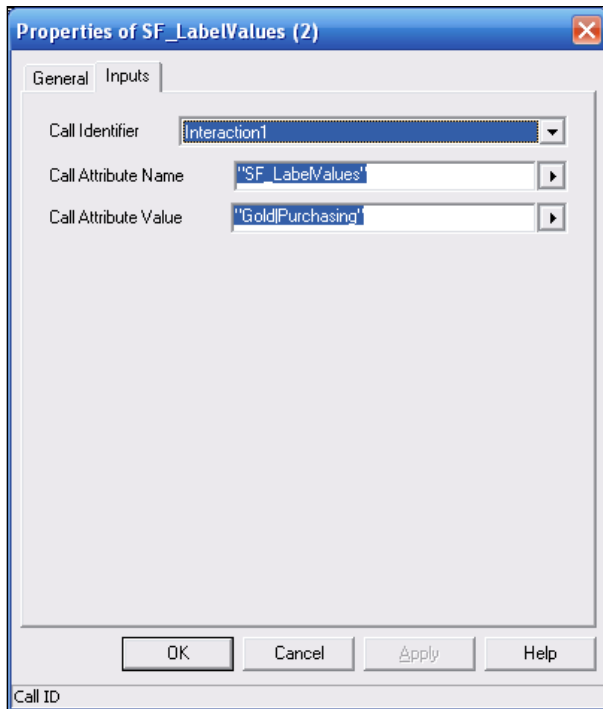
Chapter 6: Screen pops

This chapter describes three types of screen pops:

- Screen pops as they function by default
- Custom screen pops that include attributes you specify, and that search for and display matching data when popped
- Custom screen pops that open new Salesforce objects and prefill them with data

Default screen pop functionality

By default, the IC Integration to Salesforce Desktop displays the caller ID (ANI) in the soft phone, searches all phone number fields for the caller's phone number, and displays any matching records.

In the following example, the caller ID matches the Phone field in the Contact Detail record, which was automatically displayed in the workspace. The number in the caller ID would be a match in any of the other phone fields as well, had it been located there (Home Phone, Mobile, Other Phone, and so on).
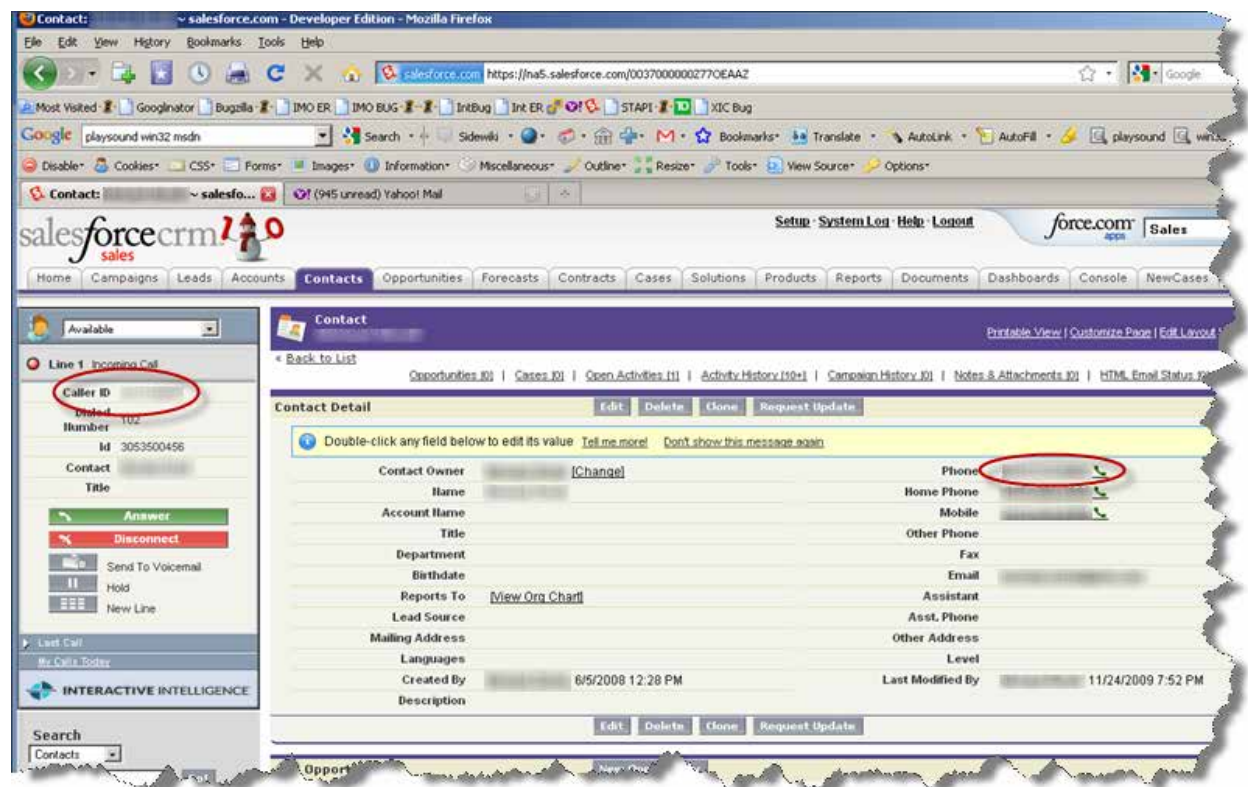
If no match is found, the phone number still appears in the Caller ID field in the soft phone, but no records are displayed in the workspace.

Customize search-based screen pops

You can create custom screen pops for inbound and outbound interactions by storing custom attributes on the interaction, which generates a screen pop that contains matching data on an inbound interaction. If the user is licensed using the Salesforce Business User license, then the screen pop is sent only for non-ACD calls. This feature uses Call Attached Data (CAD) from Salesforce Desktop.

For example, you could customize the soft phone so that it includes the account and the case number from Salesforce Desktop.
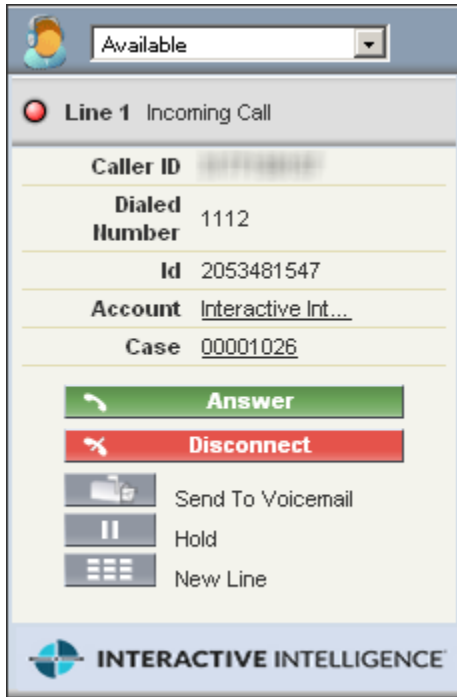
If you add only one field, the related information automatically appears in the workspace. If there are multiple custom fields, the user must click the underlined text to select which item they want to view.

Note: If there are no records that match the custom attributes, the integration reverts to the default screen pop behavior as described in the previous section.

Notice in the following graphic that both the Account Name and Case Number are underlined. The user can click the underlined text to display the related information in the workspace.

Methods for configuring screen pops

You can use either of these methods to configure screen pops:

·   Use Interaction Attendant.

·   Create a handler in Interaction Designer.

The following sections include examples of both methods.

Configure screen pop attributes in Interaction Attendant

You can use the Set Attribute tool in Interaction Attendant to specify the interaction attributes to display in the SF_CADNames and SF_CADValues attributes.

The following sections describe how to set the attributes. For more information, refer to the Interaction Attendant documentation.

Set SF_CADNames

The CAD names are names of the entity/fields within Salesforce that you want to display. For example, specify "Case.CaseNumber" to search on the Case Number under the Case entity.

Set SF_CADNames to the entity/fields, separating multiple entries with a pipe ("|"):

Set SF_CADValues

Set SF_CADValues to the values that coincide with the SF_CADNames you specified, separating multiple items with a pipe ("|"):

Configure screen pop attributes in Interaction Designer

You can use the Set Attribute tool in Interaction Designer to create a handler for the custom screen pop.

Specify a CAD name in the SF_CADNames attribute that contains the names of the entity/fields within Salesforce. Then assign the search values in the SF_CADValues attribute.
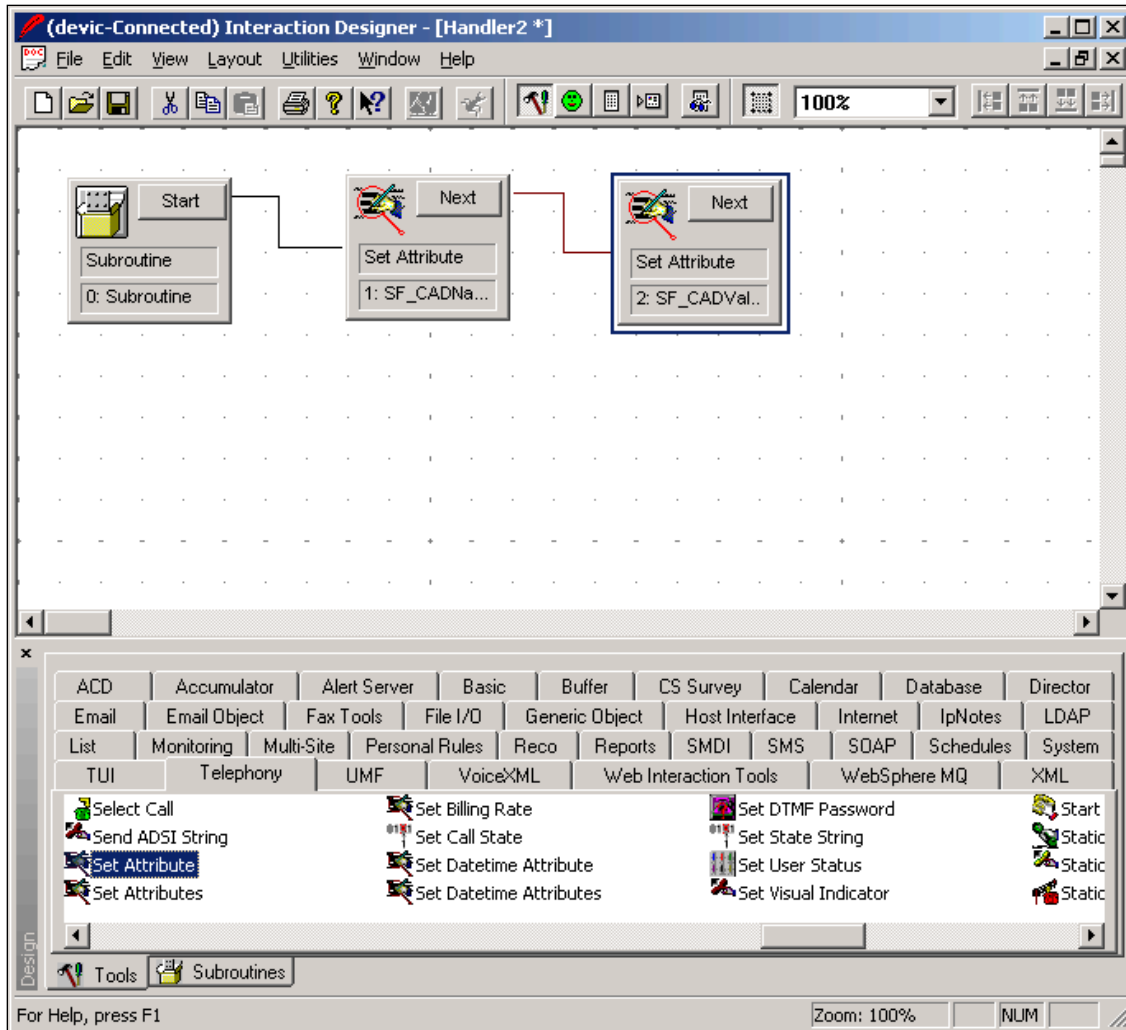
Set SF_CADNames

To create the handler, first specify the entity/fields in SF_CADNames as in this example:

```
Properties of SF_CADNames (1)                          [x]

 General  Inputs

   Call Identifier      |Interaction1                  [v]

   Call Attribute Name  |"SF_CADNames"            [>]

   Call Attribute Value |e.CaseNumber|Account.AccountNumber" [>]




                    OK      Cancel     Apply     Help

 Call ID
```

Set SF_CADValues

Specify the values in SF_CADValues as in this example:

```
Properties of SF_CADValues (2)                         [x]

 General  Inputs

   Call Identifier      |Interaction1                  [v]

   Call Attribute Name  |"SF_CADValues"           [>]

   Call Attribute Value |"00001026|1234"          [>]




                    OK      Cancel     Apply     Help

 Call ID
```

Configure screen pops for intercom calls

By default, there is no screen pop or call log activity for intercom calls. However, if your organization wants to create them, you can do so by setting the SF_CADNames and SF_CADValues attributes for intercom calls. When these attributes are set, intercom calls are treated just like inbound, external calls.

Configure screen pops to create new objects

The previous section describes how to execute screen pops by searching for existing Salesforce Desktop objects by matching values in specific fields. For example, you can define a screen pop on an existing Salesforce Case or an existing Salesforce Account.

This section describes how you can configure custom screen pops that create new Salesforce Desktop objects as the screen pop and automatically prefill them with data. This method is similar to the one for popping existing objects, but is a little more complex.

Identify the URL

Each page within Salesforce is URL-driven, meaning that you can view the URL after browsing to an object and see the exact URL to return to that location. For example, browsing to the Contacts tab results in this URL: https://na5.salesforce.com/003/o

Additionally, when you create a contact, there is a similar URL: https://na5.salesforce.com/003/e

Note: The only difference is the last character. The "003" is a three-character code that defines contacts. Each Salesforce object has its own three-character code.

The following table contains a list of some of the current codes typically used by Salesforce objects.

Salesforce object	3-character code
Contacts	003
Campaigns	701
Leads	00Q
Accounts	001
Opportunities	006
Cases	500
Products	01t

Note: Salesforce reserves the right to change these codes at any time. This approach to page manipulation is not a standards-based API. Salesforce does not guarantee that it will not change over time. Currently, there are no other alternatives from Salesforce.

The first portion of the URL (https://na5.salesforce.com) is unique to your environment. However, to screen pop a new Salesforce object, you need only the portion that follows the main URL. In the previous example to open a new contact object, you need this part: 003/e

Fill out new record data

Once you have established the URL to open a new record, you can define the fields that you want to prefill with data. Each field name can be cryptic and hard to identify. However, there are several tools available to help you identify the field names within the form. One of the tools is the "Web Developer" add-on for Firefox.

When viewing the source code behind the **Contact Edit** page, you can search for the field names. Specifically, identify the "ID" tag for the HTML input box.

Follow these steps, using **First Name** as an example:

1. Right-click the webpage, and then click **View Source**. The HTML code for that page appears.

2. Search for "First Name." That is the label next to the field in the contact record. You see this label element: <label for="name_firstcon2">First Name</label>

3. Search for the code for the First Name text box, which closely follows the label in the previous step and also follows the code for the Salutation list: <input ID="name_firstcon2" maxlength="40" name="name_firstcon2" size="12" tabindex="2" type="text" />

> **Note:** The "ID" attribute for the input element is the most crucial piece of information (name_firstcon2). Using this field, you can add parameters to the URL to prefill data for the First Name field.

> **Note:** Salesforce.com reserves the right to change the field IDs at any time. This approach to page manipulation is not a standards-based API and Salesforce does not guarantee that it will not change over time. Currently, there are no other alternatives from Salesforce.

Format the URL

The format for setting data as part of the screen pop is: <3 Character Code>e?<field value 1>&<field id2>=<field value 2>&<field id N>=<field value N>

See the following table for a description of the individual data elements.

Format element	Description
<3 Character Code>	The Salesforce object to screen pop
e?	"e" indicates a new object
<field id X>=<field id X>	Zero-to-many fields with prefilled values can be sent on the URL. This portion of the URL must be HTML-encoded. **Note:** An ampersand (&) delimits each field. You can use the Escape URL handler toolstep to escape this portion of the string.

Put it all together

Using the information you have gathered, you can now create a full URL that will create a contact with numerous pieces of data.

URL:

003/e?name_firstcon2=Michael&nane_lastcon2=Jones&con19street=7601%20Interactive%20Way&con19city=Indianapolis&con19state=1N&con19zip=46278

This URL indicates that when the interaction is delivered to the agent's desktop, it has a newly created contact "Michael Jones," who is located at 7601 Interactive Way, Indianapolis, IN 46278.

This example uses a Salesforce contact, but you can use this same approach to screen pop literally any Salesforce object.

Use interaction attributes to define interaction screen pop

Now that you understand what defines the URL string, this section describes how to use the capability within the Customer Interaction Center platform. The following table describes the three attributes that are used on all support interaction types to define how the URL-based screen pop executes.

Attribute	Description
SF_URLPop	Set of URLs for screen popping a new Salesforce Entity (Case, Contact, Account, Lead, and so on) with default values. This URL is relative to the base domain URL for the specified site.
	For example, "003/e?name_firstcon2=Michael" indicates that, when popped, it opens a new contact and populate the First Name field with "Michael."
	Note: The URL does not contain any part of the base HTTP address.
	This attribute can contain multiple URLs, if needed, to have multiple screen pop definitions for an interaction. Each URL must be pipe-delimited ("|").
	This attribute is used with SF_URLPopLink and SF_URLPopObjectType. Each attribute must contain the same number of pipe-delimited elements.
SF_URLPopLink	Set of link names within the Salesforce soft phone. The "link" text is shown in the form of a hyperlink that the agent clicks to execute the screen pop. This attribute defines the text for the link. "New Contact" is an example. This attribute can contain multiple links, if needed, to have multiple screen pop definitions for an interaction. Each link name must be pipe-delimited ("|").
	This attribute is used with SF_URLPop and SF_PopObjectType. Each attribute must contain the same number of pipe-delimited elements. See Appendix A: Attribute reference, for more details.

Attribute	Description
SF_URLPopObjectType	Set of Object Type names used within the Salesforce soft phone. This attribute contains the name for the label next to the link shown for the URLPopLink. For example, if the link is "Create Contact," the object is "Contact." Similar object types are grouped within the Salesforce soft phone.

This attribute can contain multiple object types, if needed, to have multiple screen pop definitions for an interaction. Each object type name must be pipe-delimited ("|").

This attribute is used with SF_URLPop and SF_URLPopLink. Each attribute must contain the same number of pipe-delimited elements. See Appendix A: Attribute reference, for more details. |

In the Contact example, each of the attributes is set as follows:

· SF_URLPop = 003/e?name=firstcon2=Michael&name_lastcon2=Jones&con19street=7601%20Interactive%20Way&con19city=Indianapolis&con19state=IN&con19zip=46278

· SF_URLPopLink=New Contact

· SF_URLPopObjectType=Contact

Using either Interaction Attendant or handlers in Interaction Designer to set these attributes would result in an inbound screen pop that looks similar to the following graphic.

Note: SF_URLPopLink defines the text for the underlined link and SF_URLPopObjectType defines the object type or "label" for that object.
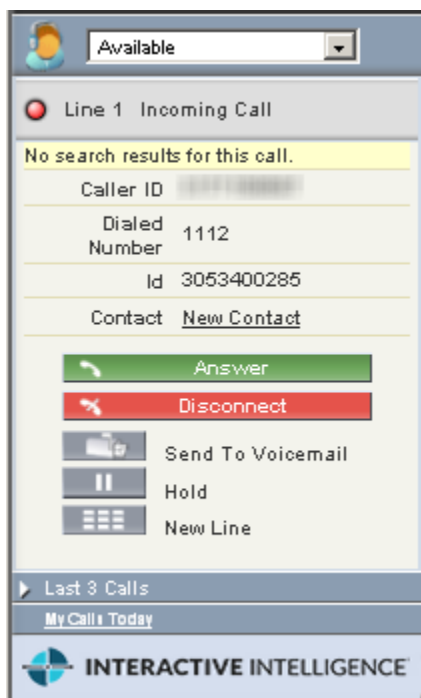
Then, when the agent clicks the "New Contact" link in the example, the result is a new, prefilled contact record in the Salesforce workspace area.

Configure screen pops for intercom calls

By default, there is no screen pop or call log activity for intercom calls. However, if your organization wants to create them, you can do so by setting the SF_CADNames and SF_CADValues attributes for intercom calls. When these attributes are set, intercom calls are treated just like inbound, external calls.

Chapter 7: Configure Dialer campaigns for Soft Phone clients

This chapter explains how to use the Salesforce Dialer Scripts container to configure base scripts that are used with the IC Integration to Salesforce Desktop with the Dialer plug-in. This chapter is applicable to you only if you are using Interaction Dialer.

If you are familiar with Interaction Dialer administration, then you have created base scripts for your Outbound Dialer server using the Scripts container in Interaction Administrator. The scripts you create in Interaction Administrator for Salesforce Desktop are standard base scripts. Dialer administrators can view and update them using the Scripts container in the Salesforce Dialer container in Interaction Administrator.

You can also use the Salesforce Dialer Scripts container to configure the subset of scripting features that are compatible with the soft phone user interface.

Note: The scripts you define in the Salesforce Dialer Scripts container must be associated with a campaign.

Open the Salesforce Dialer Scripts container

Note: To complete this procedure, you must use ICServerManagerApps to open a remote instance of Interaction Administrator. You must be a CIC administrator to complete this procedure.

To open the Salesforce Dialer Scripts container:

1. In the Interaction Administrator tree, expand the **Salesforce Dialer** container.

2. Click the **Scripts** container.
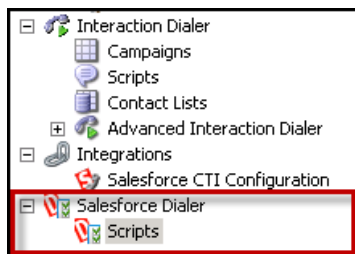
Main elements of the Scripts container
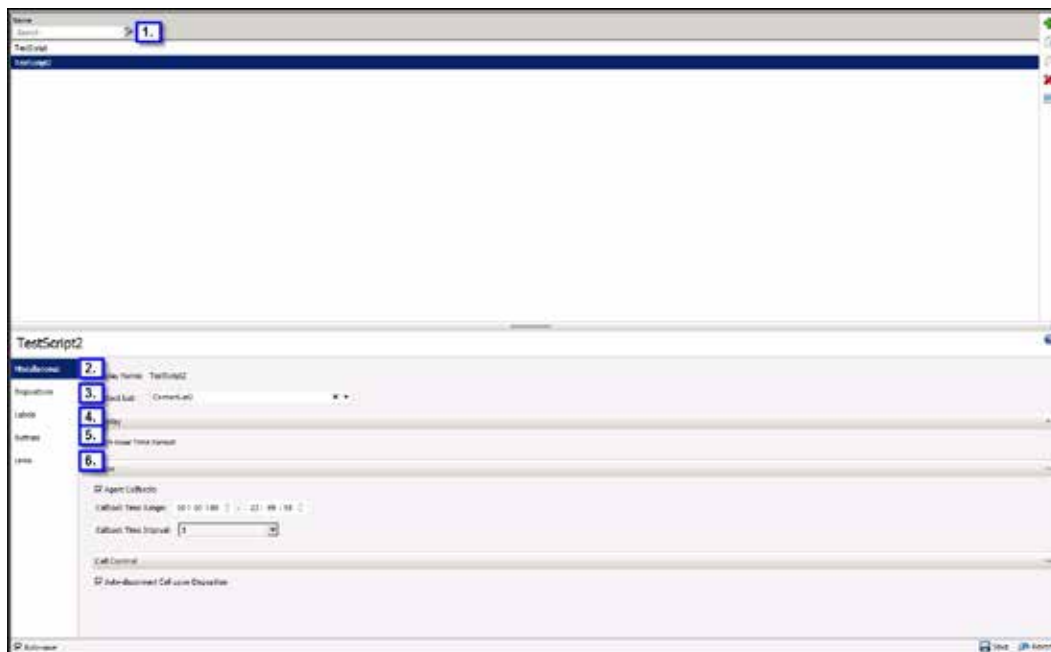
The following items are the main elements of the Scripts container:

1. **Scripts list.** This view shows all of the Salesforce base scripts that you have created either here or in the Scripts container in Interaction Administrator. You can search for scripts by name. Options on this toolbar create, copy, and delete base scripts. To begin editing a script, click its name in this list.

   > **Note:** No filtering is done to exclude scripts that are possibly incompatible with Salesforce. Therefore, consider adding a prefix such as "SF_" to the names of Salesforce scripts.

2. **Miscellaneous tab.** Controls in this section manage settings that apply to Scheduled Callbacks and Miscellaneous items, such as whether to disconnect each call automatically once it is dispositioned.

3. **Dispositions tab.** Options in this tab manage the call disposition options that agents can select from after clicking the Disposition button in their Salesforce Desktop soft phone. Dispositioning a call categorizes the call result using a set of standard wrap-up categories, and custom wrap-up codes that are specific to the campaign.

4. **Labels tab.** Options in this tab let you choose which columns to display when interactions screen pop in the soft phone.

5. **Buttons tab.** Options in this tab define custom buttons in the soft phone. Each custom button constructs a URL passed to Salesforce Desktop, to look up a record or create a new Salesforce Desktop object. This object works much like screen pops that create new Salesforce objects. However, the action is not executed until the agent presses the button.

6. **Links tab.** Options on the Custom Links tab define a custom hyperlink in the soft phone. Each entry defines a URL passed to Salesforce Desktop, to look up a record, or create a new Salesforce Desktop object. This object works much like screen pops that create new Salesforce objects. However, the action is automatically executed when the soft phone displays the information about the

Dialer call in the data pop. If there are multiple links enabled, they are executed in priority order. When submitted, the value of database fields or custom fields is passed in the string, so that the query string is specific to the current contact.

Many tabs in the Scripts container have a toolbar containing the following, frequently used commands:

Add

Edit

Delete

Move up in the list

Move down in the list
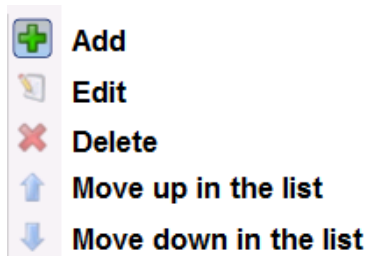
Configure miscellaneous settings

You configure callback settings and miscellaneous settings for a campaign on the Miscellaneous tab.

To configure miscellaneous settings:

1. On the Miscellaneous tab, in the Display Name box, verify that the name of the script that appears is the one you want to configure. This name identifies the script here and in the Interaction Dialer Scripts container.

2. In the Contact List list, select the contact list for this script.

3. Under the Display expander, select the **24-Hour Time Format** check box if you want time values in the script to appear in 24-hour format.

4. Under the Allow expander, select the **Agent Callbacks** check box if you want agents to "own" callbacks that result from the use of this script. If an agent chooses to own the callback, then when it matures, Interaction Dialer attempts to route the callback to that agent. If the agent is not available, then Interaction Dialer routes the callback to the first available agent.

5. Use the Callback Time Range controls to specify when agents can schedule callbacks. For example, you can use these controls to prevent agents from scheduling callbacks after business hours. The maximum period is 24 hours.

6. In the Callback Time Interval list, select the interval for the Callback Time Range. For example, suppose you select 08:00-17:00 for the Callback Time Range and select an interval of 15 minutes. When the agent selects a Scheduled disposition, the agent sees a time range from 8:00-17:00 in 15-minute intervals: 8:00, 8:15, 8:30, 8:45, 9:00, and so on.

7. To automatically terminate a call after the agent selects a disposition for it, under the Call Control expander, select the **Auto-disconnect Call upon Disposition** check box.

Configure dispositions

Dispositions categorize call results using a set of standard wrap-up categories and campaign-specific wrap-up codes. You define call outcomes (dispositions) on the Disposition tab. An agent selects the disposition for a call from a shortcut menu from after clicking the Disposition button in the Salesforce Desktop soft phone.
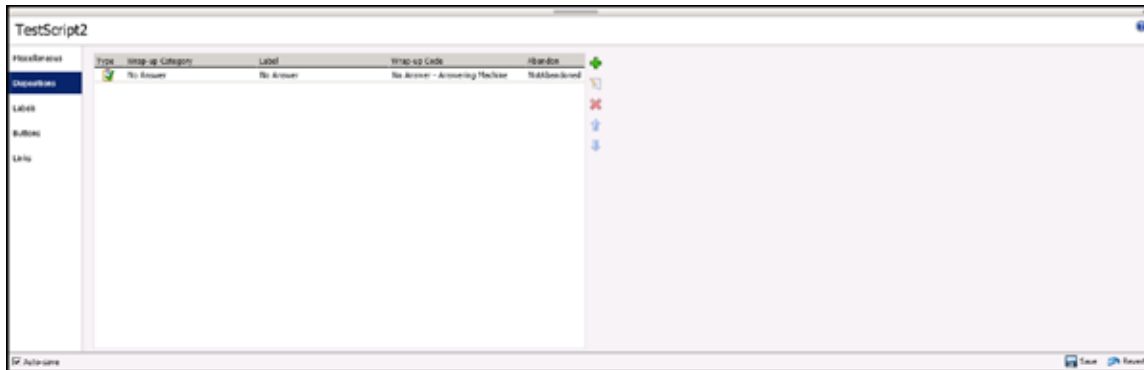
To add a disposition:

1. On the toolbar, click the **Add** button (plus sign).

   The Add New Disposition dialog box appears.

2. In the Label box, type a descriptive word or phrase that summarizes the disposition. This text appears in the shortcut menu in the soft phone after the agent clicks Disposition Call, as shown in the following graphic.

3. In the Wrap-up category list, select the completion status of the call. Wrap-up categories are also known as reason codes. They are used for reporting purposes to evaluate the success of the script. The following table lists the available wrap-up categories/reason codes. Wrap-up categories/reason codes are defined in Interaction Administrator and are used for all campaigns.

Wrap-up category	When to use
Ambiguous	Use when no other wrap-up category applies.
Busy	Use when the dialed number is busy.
Deleted	Use when a customer asks to "Take my name off your list." The agent who deletes the number from the Contact List usually assigns this reason code.
Failure	Use to indicate that the call was not successful in reaching the campaign goal.
Fax	Use when a fax machine is detected.
Machine	Use when an answering machine is detected.
No Answer	Use when no one answers a call.
Non-Dialer Caller	Use when the call was not placed by Interaction Dialer.
Not Reached	Use when the contact was not reached.
Phone Number Deleted	Use to disposition a 'Do not call' number. This reason code can be used to mark a phone number as "U" (unusable) to indicate that the call outcome was unsuccessful. It can be used when a particular phone number is a wrong number, but the whole record should not be marked un-callable.
Phone Number Success	Indicates that the call was successful, however Success should be used instead, since this reason code flags a phone number as "U" (unusable). This code is used in Dialer for activities such as playing a .wav file once to every phone number on a record. Do not use it to record regular calls that met the campaign goal.
Remote Hang Up	Use to indicate that the call was abandoned by the contact.
Rescheduled	Use to indicate that the call has been rescheduled.
Scheduled	Use to indicate that a callback has been scheduled.

Wrap-up category	When to use
SIT	Use to classify both SIT callable and SIT uncallable return results.
SIT Callable	Use to indicate that special information tones were heard for a callable number, due to a bad number, no circuit, or other problem.
SIT Uncallable	Use to indicate that special information tones were heard for an uncallable number, due to a bad number, no circuit, or other problem.
Skipped	Use to indicate that a Preview call was skipped.
Success	Use to indicate that the call was successful as relates to the campaign goal.
Transferred	Use to indicate that the agent transferred the call.
Wrong Party	Use to indicate that the call reached the wrong party.

4.   Select a Wrap-up Code for the disposition. You define all wrap-up codes in Interaction Administrator. They are script-specific. Wrap-up codes categorize the outcome of each contact attempt for reporting and scheduling purposes. For example, a wrap-up code for a newspaper subscription campaign might be "Doesn't Read the Newspaper."

Note: Wrap-up codes enable in-depth reporting about a single campaign. Wrap-up categories provide for standardized reporting across multiple campaigns.

5.   From the Abandon list, do one of the following:

·   Select **Abandoned** if the call was lost. For example, if the contact hung up, or if the call was dropped.

·   Select **Not Abandoned** if the call was intentionally terminated by either the caller or the agent.

6.   Click **OK**.

Configure labels

The Labels tab defines which caller information appears in the soft phone when an interaction screen pops for a call that is placed by Interaction Dialer.
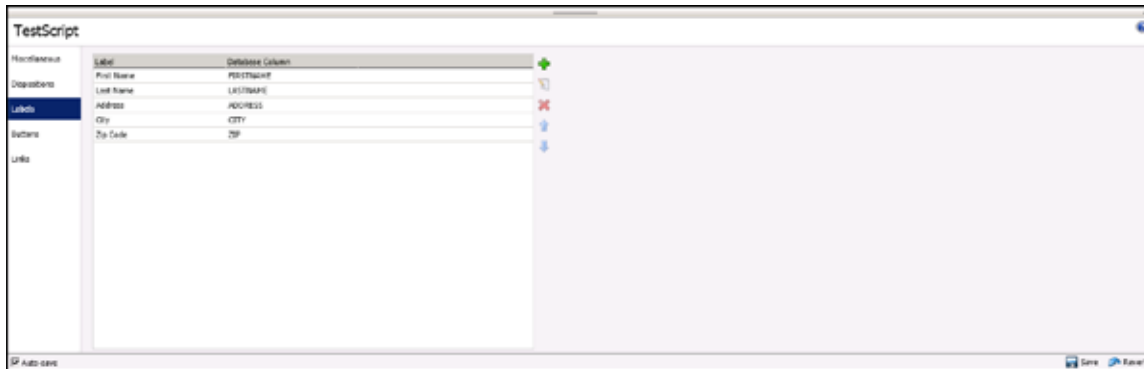
To add a label:

1. On the toolbar, click the **Add** button (plus sign). The Add Custom Label dialog box appears.
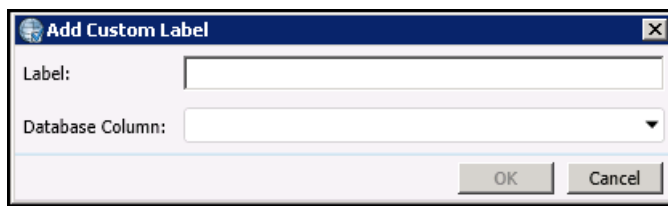
2. In the Label box, type the value to display in the soft phone.

3. From the Database Column list, select the database column that is the source of the data.

4. Click **OK**.

Configure buttons

You define custom buttons for the soft phone on the Buttons tab. Each custom button constructs a URL passed to Salesforce, to look up a record, or create a Salesforce object. Buttons work like screen pops that create new Salesforce objects, except that the action is not executed until the agent presses the button.

Note: See Configure links if you would rather add a hyperlink instead of a button.
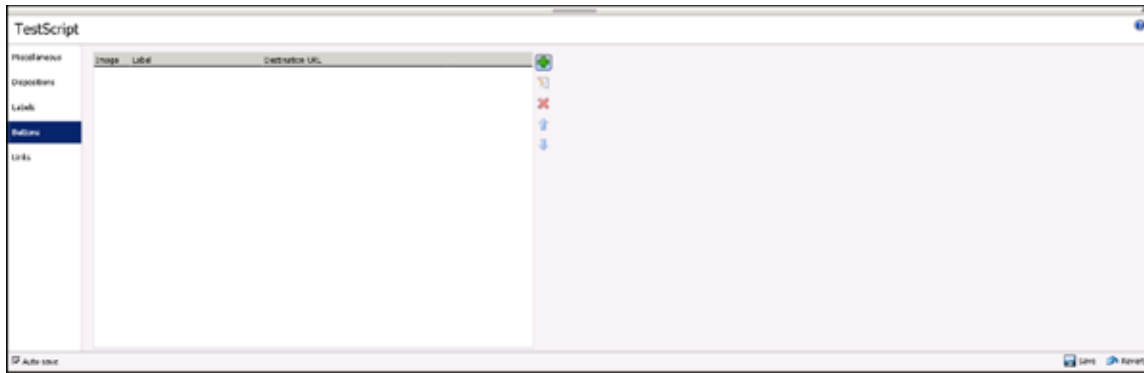
To add a button:

1. On the toolbar, click the **Add** button (plus sign).

   The Add Custom Button dialog box appears.
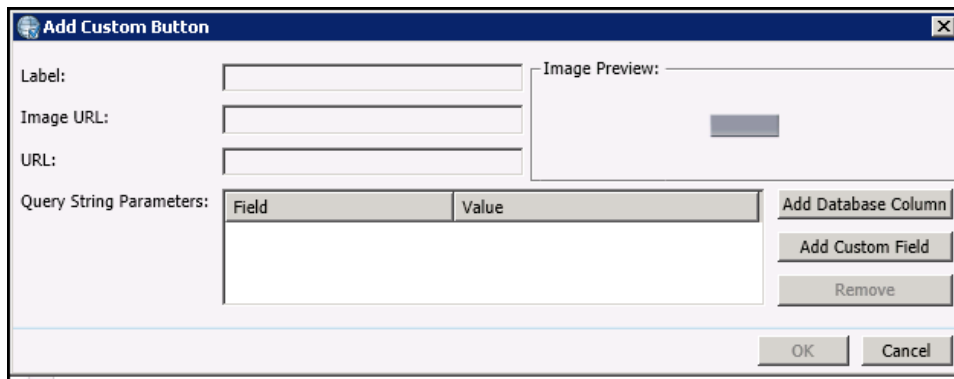
2. In the Label box, type the caption that appears next to the button.

3. In the Image URL box, type the URL to a custom background button image. If you do not specify an image URL, the grey box that appears in the Image Preview field is used.

   > **Note:** The image must be hosted on a web server.

4. In the URL box, type the base URL of the Salesforce page. This URL becomes part of the URL query string.

5. In the Query String Parameters section, you can add database columns and custom fields. When an agent clicks the button, the value of database fields or custom fields is passed in the string, so that the query string is specific to the current contact. Do either of the following:

   · To add the value from a database column, click the **Add Database Column** button. The Contact List Columns dialog box appears.

- Select the column. When the query string is submitted to the Salesforce server, the value of this field from the current contact record is substituted. Then click **OK**.

- To add a custom field, click the **Add Custom Field** button. A new row of fields appears in the Query String parameters section.

Under Field, type the field name. Under Value, type the value.

> **Note:** The field values are not based on database fields. They are specific to Salesforce Desktop and the page that you are trying to load.

6. Click **OK**.

Configure links

The Links tab defines a custom hyperlink in the soft phone. Each entry defines a URL passed to Salesforce, to look up a record, or create a Salesforce object. When submitted, the value of database fields or custom fields is passed in the string, so that the query string is specific to the current contact.

> **Note:** See Configure buttons if you would rather add a button instead of a hyperlink.
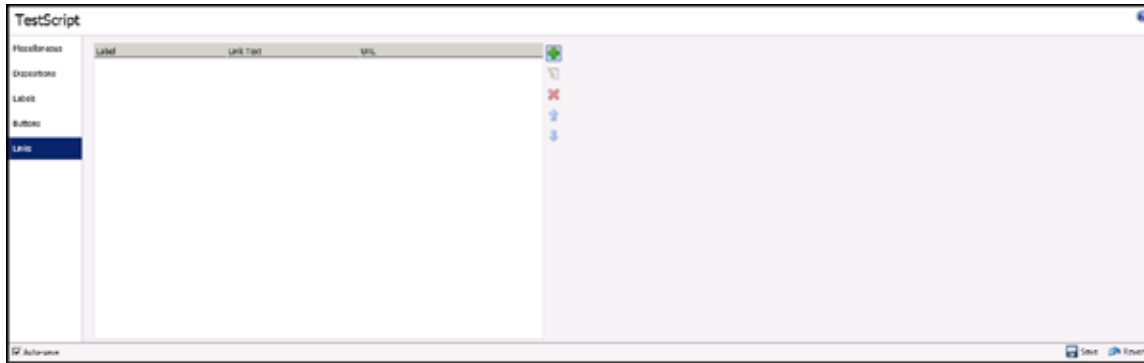
To add a link:

1. From the toolbar, click the **Add** button (plus sign).

   The Add Custom Link dialog box appears.
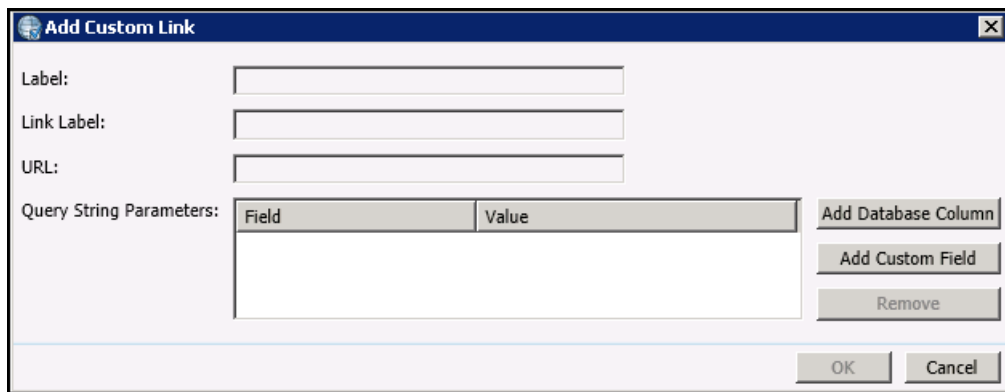
2. In the Label box, type the caption that appears next to the link.

3. In the Link Label box, type the text that is the hyperlink.

4. In the URL field, type the base URL of the Salesforce page. This URL becomes part of the URL query string.

   Example: Suppose you wanted to create a link that agents could click to add a new contact. In the Label box, type Create. In the b box, type New Contact. In the URL box, type the URL for the New Contact page. The link would appear like this: Create New Contact and would take the agent to the New Contact page when clicked.

5. In the Query String Parameters section, you can add database columns and custom fields. When an agent clicks the link, the value of database fields or custom fields is passed in the string, so that the query string is specific to the current contact. Do either of the following:

   · To add the value from a database column, click the **Add Database Column** button. The Contact List Columns dialog box appears.

- Select the column. When the query string is submitted to the Salesforce server, the value of this field from the current contact record is substituted. Then click **OK.**

- To add a custom field, click the **Add Custom Field** button. A new row of fields appears in the Query String parameters section.

- Under Field, type the field name. Under Value, type the value.

> **Note:** The field values are not based on database fields. They are specific to Salesforce Desktop and the page that you are trying to load.

6. Click **OK**.

Outbound dialing modes

To define an appropriate set of call disposition buttons for agents to use in the soft phone, administrators need to know each campaign's dialing mode.

Most dialers work only in a predictive dialing mode—meaning that an agent availability prediction must be made before an outbound call is placed. Interaction Dialer offers more dialing modes that give agents more control over outbound interactions.

In Preview dialing mode for example, agents need buttons to dial a preview call, plus options for dispositioning the call outcome. Conversely, a predictive campaign needs only disposition buttons. This is because agents receive only calls that are connected with the contact, and they don't get to choose whether that person is called or not.

The following dialing modes are supported on a per-campaign basis:

· Preview. Preview dialing mode presents agents with information about the targeted party before the call is actually placed. When ready, the agent manually initiates the call by clicking a button in the predictive client application.

  In Preview Mode, a screen pop is presented to an available agent while places a call object in an initializing state on their queue. The agent will then be able to review the information for the customer record and then decide to place the call or skip to the next record. Once the call is placed, it is placed from the agent's user queue and no call analysis is performed (the agent will hear all pre-connect audio). This is the slowest of the Dialing methods, but it prevents any chance of abandonment. This mode is typically used for high value contacts.

· Power. In Power dialing mode, Interaction Dialer places calls from the contact list only when an agent is available to process the call. Interaction Dialer waits for an agent to become available before placing outbound calls. It calculates the number of calls to place in order to reach a live party.

· Predictive. In predictive dialing mode, the server predicts agent availability and places calls based on internal statistics. The server predicts the number of calls that must be made in order to provide each agent with a targeted party at the moment the agent becomes available.

  Predictive mode works identically to Power dialing mode, except that Dialer tries to predict when an agent will be idle and place the calls prior to that, so that by the time the call has been answered by a customer, a Dialer agent will be just becoming available. It does this by tracking how long agents spend on calls, so it can make an accurate prediction. This mode requires at least seven agents to be logged on, preferably more. The larger the agent pool, the more accurate the predictions can be, minimizing idle time further than in Power mode and decreasing the likelihood of an abandon.

Agentless calling mode is not supported

Interaction Dialer also offers an Agentless Calling dialing mode, but it is not supported since agentless campaigns do not use Salesforce agents. Campaigns in this mode typically play an audio recording to answering machines, send faxes to fax machines, or route calls answered by live recipients to an Attendant Profile.

Chapter 8: Troubleshooting

What if the Adapter icon does not appear in the Windows notification area?

When you install the Salesforce Dialer Integration Client, the Salesforce Adapter icon is automatically installed and started in the Windows notification area on the workstation.

A desktop shortcut is also created.

If Salesforce Adapter icon does not appear in the Windows notification area, double-click the icon for the desktop shortcut instead.

Appendix A: Attribute reference

The Customer Interaction Center integration with Salesforce Desktop uses numerous standard call attributes and attributes that are defined specifically for this integration. This section describes, in detail, all of the custom attributes used in the integration, and some of the standard "Eic_" attributes. For more information about CIC attributes, see the *Interaction Attributes Technical Reference* in the Documentation Library on the IC server.

Custom attributes

Attribute name	Description of usage
SF_ANI	For an inbound interaction, this field is read as an override to the default logic for retrieving CallerID (or ANI). If set, this field is the remote number shown in the Salesforce soft phone. If not defined, the following attributes are used per the interaction type: · All Interaction Types -> Utilizes "Eic_RemoteId" if it contains data, otherwise "Eic_RemoteAddress."
SF_DNIS	For inbound and outbound interactions, this field is read as an override to the default logic for retrieving the dialed number (or DNIS). If set, this is shown as the dialed number within the Salesforce soft phone. If not defined, the following attributes are used per the interaction type: · Generic Object -> Goes through the following attribute looking for the first that is not blank: · (If inbound only) "Eic_LocalTn" · "Eic_RemoteId" · All other interaction types -> Goes through the following attribute looking for the first that is not blank: · (If inbound only) "Eic_LocalTnRaw" · "Eic_RemoteId" · "Eic_RemoteAddress"
SF_CADNames	Set of search name criteria used in searching for existing Salesforce entities. The attribute can have one or many values delimited by a pipe character "|." This attribute is used with SF_CADValues and *must* have the same number of parameters (pipe-delimited). For more information, see [Customize search-based screen pops](#).
SF_CADValues	Set of search value criteria used in searching for existing Salesforce entities. The attribute can have one or many values delimited by a pipe character "|." This attribute is used with SF_CADNames and *must* have the same number of parameters (pipe-delimited). For more information, see [Customize search-based screen pops](#).

Attribute name	Description of usage
SF_LabelNames	Set of names to display on the left-hand side of the Salesforce soft phone. These names give the agent more information about the interaction than the standard fields (Caller ID, Dialed Number, ID, and so on).
	One example would be to show the customer's "level" with a value of "Gold," "Silver," or "Bronze."
	The attribute can have one or many values delimited by a pipe character "|." Each shows as a separate row in the Salesforce soft phone.
	This attribute is used with SF_LabelValues and must have the same number of parameters (pipe-delimited).
	For more information, see Methods for creating custom attributes.
SF_LabelValues	Set of values to display next to the label name defined in the previous parameter within the Salesforce soft phone. These names give the agent more information about the interaction than the standard fields (Caller ID, Dialed Number, ID, and so on).
	One example would be to show the customer's "level" with a value of "Gold," "Silver," or "Bronze."
	The attribute can have one or many values delimited by a pipe character "|." Each shows as a separate row in the Salesforce soft phone.
	This attribute is used with SF_LabelNames and must have the same number of parameters (pipe-delimited).
	For more information, see Methods for creating custom attributes.
SF_InteractionType	The attribute allows the "Interaction Type" label for inbound interactions in the Salesforce soft phone to be overridden. The label does not show for call interactions, but shows for all other supported interactions. By default, the "Interaction Type" label is the following for each interaction type:
	· E-mail -> "E-mail"
	· Web Chat -> "Web Chat"
	· Callback -> "Callback"
	· Dialer Call -> "Dialer Call"
	· Generic Object -> "Generic"
	While the defaults are typically fine, the most commonly used value for this attribute is the Generic Object interaction type. For a generic object, you can name the object or process that you are queuing. For example, "Escalated Case."
	If this attribute is not set on the interaction, the default is used. This field is automatically stored in the Salesforce call log activity as the "Type" field.

Attribute name	Description of usage
SF_URLPop	Set of URLs for screen popping a new Salesforce entity (Case, Contact, Account, Lead, and so on) with default values. This URL is relative to the base domain URL for the specified site.
	For example, "003/e?name_firstcon2=Michael" indicates that when popped it will open a new Contact and populate the First Name field with "Michael."
	Note: The URL does not contain any part of the base HTTP address.
	This attribute can contain multiple URLs if multiple screen pops are needed for an interaction. Each URL must be pipe-delimited ("|").
	This attribute is used with SF_URLPopLink and SF_URLPopObjectType. Each attribute must contain the same number of elements pipe-delimited.
	For more information, see Configure screen pops to create new objects.
SF_URLPopLink	Set of link names within the Salesforce soft phone. The link text is shown in the form of a hyperlink that the agent clicks to perform that screen pop. This attribute defines the text for that link. For example, "Create Contact."
	This attribute can contain multiple links if multiple screen pops are needed for interaction. Each link name must be pipe-delimited ("|").
	This attribute is used in conjunction with SF_URLPop and SF_URLPopObjectType. Each attribute must contain the same number of elements pipe-delimited.
	For more information, see Configure screen pops to create new objects.
SF_URLPopObjectType	Set of object type names used within the Salesforce soft phone. This attribute should contain the name for the label next to the link shown for the URLPopLink. For instance, if the link is "Create Contact," the object might be "Contact." Object types that are alike are grouped together within the Salesforce soft phone.
	This attribute can contain more than one object type should the need arise to have more than one given screen pop definition for an interaction. Each object type name must be pipe-delimited ("|").
	This attribute is used in conjunction with SF_URLPop and SF_URLPopLink. Each attribute must contain the same number of elements pipe-delimited.
	For more information, see Configure screen pops to create new objects.

Custom attributes that are written to for a given interaction

Attribute name	Description of usage
SF_PhoneNumber	This attribute is set on inbound and outbound call interactions as a formatted number for the remote party, according to the Interactive Intelligence Dial Plan. On inbound calls, this number is the CallerID (or ANI) whereas for outbound calls this number is dialed to reach the remote party. The purpose for setting this value is the remote number can be stored as a specialized attribute within the Salesforce call log activity. Using the synchronization of CIC interaction attributes to Salesforce call log fields, this value can easily be stored within the call log activity. The value this adds is that for each given Salesforce call log a user see the actual number called or dialed from which would likely differ from the default associated number for the associated account, contact, case, and so on The synchronization is not setup out of the box. It requires two steps to implement: 1. Create a custom activity field within the Salesforce Activity. Use the API name of the field in step #2. 2. In Interaction Administrator, map the API name to the SF_PhoneNumber attribute.
SF_TransferredTo	This attribute is set when an interaction is transferred to another interaction. It is set to CIC's CallIdKey, which is the unique key for a given interaction. In a transfer scenario, where Call A is transferred to Call B, this value would set Call B's CallIdKey to this attribute on Call A. The purpose of setting this attribute is to allow the transfer references to be stored in Salesforce's call log activity. The synchronization is not set up out of the box and requires these two steps to implement: 1. Create a custom activity field within the Salesforce Activity. You will use the API name of the field in step #2. 2. In Interaction Administrator, map the API name to SF_TransferredTo attribute.

Attribute name	Description of usage
SF_TransferredFrom	This attribute is set when a given interaction is transferred to another interaction. It is set to CIC's CallIdKey, which is the unique key for an interaction. In a transfer scenario, where Call A is transferred to Call B, this value would set Call A's CallIdKey to this attribute on Call B. The purpose for setting this attribute is to allow the transfer references to be stored in Salesforce's call log activity. The synchronization is not set up out of the box and requires these two steps to implement: 1. Create a custom activity field within the Salesforce Activity. You will use the API name of the field in step #2. 2. In Interaction Administrator, map the API name to the SF_TransferredFrom attribute.
SF_ConferencedWith	This attribute is set when a given interaction is conferenced with another interaction. It is set to CIC's CallIdKey, which is the unique key for an interaction. In a conference scenario, Conference With always refers to the original call with which a conference was initiated. In most cases, this call is the original inbound customer interaction or the original outbound customer call. The call that all other calls reference will not have this parameter set because all others reference this interaction. The purpose for setting this attribute is to allow the conference references to be stored in Salesforce's call log activity. The synchronization is not set up out of the box and requires these two steps to implement: 1. Create a custom activity field within the Salesforce activity. You will use the API name of the field in step #2. 2. In Interaction Administrator, map the API name to the SF_ConferencedWith attribute.

Attribute name	Description of usage
SF_IRRecorded	This attribute is set when the integration detects that Interaction Recorder is recording the interaction. The value is set as a yes/no flag (1 for being recorded/0 for not being recorded).
	You can use this value to store whether the interaction was recorded in the Salesforce call log activity.
	The synchronization is not set up out of the box and requires these two steps to implement:
	1. Create a custom activity field within the Salesforce activity. Use the API name of the field in step #2.
	2. In Interaction Administrator, map the API name to the SF_IRRecorded attribute.
	For more information about recordings in Salesforce, see the Salesforce development application notes at: https://my.inin.com/products/pages/development-application-notes.aspx.

System attributes used

Attribute name	Description of usage
Eic_CallIdKey	Used to refer to the interaction when communicating with Salesforce.
Eic_ConferenceId	Used to represent conference calls within the Salesforce soft phone.
Eic_Recorders Eic_RecordersSupv	Used to determine if Interaction Recorder is recording a call.
Eic_Muted Eic_State Eic_CallStateString	All used to represent state within the Salesforce soft phone.
Eic_CallPurpose	Used to determine if an interaction is an Interaction Dialer-based interaction, so that it pops appropriately.
Eic_CallType	Used to determine if an interaction is Intercom or not. This information is important when deciding whether to screen pop and create the call log within Salesforce, as intercom calls do neither by default unless the attributes are set on the interaction requesting a screen pop.
Eic_LocalTnRaw Eic_LocalTn Eic_RemoteId Eic_RemoteAddress Eic_RemoteName	All used in calculating Caller ID (ANI) and Dialed Number (DNIS).
Eic_CallDirection	Used to ensure the interaction shows the correct direction in Salesforce (inbound vs. outbound).
Eic_AssignedWorkgroup	Used to determine if an interaction is an ACD-based interaction. This is used to not deliver a screen pop if the user is using the Business User (Non-ACD) Salesforce license.
Eic_AccountCode	Used to both retrieve the current account code defined for the current interaction and to set the account code if they are enabled within Interaction Administrator.
Eic_WrapUpCodeSet	Used to set wrap-up codes for ACD-based calls defined as requiring a wrap-up code.
Eic_CallbackPhone	For callback interactions, this attribute contains the phone number to be used for the phone callback.

Attribute name	Description of usage
Eic_Subject	For callback interactions, this attribute contains the context as to why the agent will be calling back the customer. **Note:** Salesforce has a limitation to the amount of text they are able to show within the soft phone, so be sure to limit the callback message to a minimal length.
Eic_ObjectType	Defines the interaction type. The Salesforce soft phone displays different attributes based on the specified interaction type. Currently calls, e-mails, web chats, callbacks, and generic objects are supported interaction types.

Interaction attributes that are set in Interaction Dialer

For information on the interaction attributes that are set in Interaction Dialer, see the *Interaction Attributes Reference Guide* in the Documentation Library.

Change log

Change log date	Changes made
September 29, 2008	Initial document created.
March 27, 2009	· Added support for Mozilla Firefox 3.0 or higher to Requirements section. · Added reference to the *IC Installation and Configuration Guide* for Customer Interaction Center requirements. · Added requirement for .NET Framework 2.0 and 3.0, or 3.5 on the client machine. · Added section on setting user button display rights to configure the buttons that appear on the soft phone.
June 2, 2009	· Added Multimedia Routing section. · Replaced screen shots to show New Line button. · Added synchronization of interaction attributes with Call Log. · Added support for Firefox in Requirements section. · Modified requirements for .NET Framework.
September 16, 2009	· Changed Firefox requirement from version 3.0 to 3.5.
October 5, 2009	· Added notes section for Firefox users. · Added section on creating screen pops and call log entries for intercom calls. · Added information about account code options. · Added section about storing call recording information. · Added section about configuring default user options. · Added section for configuring call log entries for calls that do not connect.
November 3, 2009	· Added Attribute Reference.
December 14, 2009	· Added to screen pop information. · Added requirement for MSXML 6.
February 5, 2010	· Updated version of Firefox in Requirements section to support new version of Salesforce CTI. · Updated front matter.
February 18, 2010	· Added section covering the installation of Salesforce extension for Firefox.

Change log date	Changes made
March 11, 2011	· Updated Requirements section to remove support for CIC version 2.4. · Changed Interaction Properties dialog box name to Account Codes dialog box. · Removed configuration options for Advanced Dialing Options and sorting account codes since these options are now in the Interaction Client configuration. · Added configuration option for Keep "Current Call Log" section open. · Added section for Global User options. · Updated screen captures with new buttons.
September 28, 2012	· Updated screen captures. · Documented new configuration options in Interaction Administrator. These options replace fields that were previously included in the XML definition file. · Removed logging option from description of the context menu.
January 5, 2013	· Added new Interaction Administrator options under General tab. · Updated items for CIC 4.0.
October 22, 2013	· Updated items for CIC 4.0, SU 4. Consolidated content from the Interaction Dialer Integration with Salesforce.com Administrator's Guide.
March 17, 2014	· Added a cross reference in Appendix A to the Interaction Attributes Technical Reference. · Updated links on pages 17 and 30 to the Product Information site (http://my.inin.com/).
May 29, 2014	· Corrected version number on front cover.
August 12, 2014	Changed Page 11 – Requirements section · Changed CIC version from SU3 to SU4 · Removed IE 7 from first row of browser table · Removed the ( ) content from the Firefox row Changed Page 15 – Requirements section · Changed CIC version from SU3 to SU4 · Change Dialer version from SU2 to SU3 · Server manager apps change from su1 to su2
September 18, 2014	Changed explanation in "Configuring a feature to link to call recordings" section about mapping call attributes.
November 6, 2014	Removed information about embedding call recordings in Salesforce Desktop from the "Configuring a feature to link to call recordings" section. Functionality is not available in CIC 4.0.

Change log date	Changes made
December 15, 2014	Updated documentation to reflect changes required in the transition to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, and copyright and trademark information.
February 3, 2015	Updated requirements for CIC 2015 R2. Updated installation and Call Center Edit page screen shots.
May 20, 2015	Removed Configure a feature to link to call recordings section.
May 29, 2015	Updated documentation to reflect the addition of Interaction Desktop.
June 16, 2015	Updated for 2015 R3.
August 4, 2015	Updated for 2015 R4.
August 11, 2015	Updated browser requirements.
April 25, 2017	Removed mention of Interaction Client .NET Edition.