

# OneView for Salesforce Agent Guide

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CX Optimized

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# 1 Getting started

This document provides instructions for using OneView in Salesforce. Availability of features are dependent on your administration's configuration of Genesys Cloud and Salesforce.

# 1.1 Accessing OneView

**Note:** OneView does not support running concurrently in multiple browser windows or Salesforce tabs.

1. In Salesforce, navigate to the OneView phone in the bottom of the screen .

OneView
Tasks Recently Viewed •
0 items • Updated 5 minutes ago
Subject
📞 OneView

 In the Genesys Cloud CTI phone, enter your Genesys Cloud credentials. If your organization uses single sign-on (SSO), a pop up window will automatically appear. If not, click **Open Authentication Window** to enter your applicable SSO credentials.

Ð	Genesys	Cloud	Phone	_
ariasoluti	ionslab [C	hange Organization ]	Waiting for cr	avtex> redentials
	Email Address		Open Authenticatio	n Window
	Password	]		
	Log In			
	Forgot Your Password?			
	Log in with another accou	int:		F
Micro	osoft okta	salesforce		Genesys Cloud.
	Identity Providers included on this page are register is claims no ownership rights to such trademarks or represent.		📞 OneView (Offline	:)

**Note:** Check for a pop-up blocker notice in your browser if the SSO window does not open.

# 1.2 Language preference

In addition to native English, OneView supports the following languages for agents:

- French
- German

Displayed language is determined by the individual user's *preferred language* in Salesforce. See <u>https://help.salesforce.com/s/articleView?id=000325737</u>.

#### Notes:

- Translations within Salesforce tabs and pages are derived from Salesforce.
- Translations within the CTI panel are derived from Genesys Cloud.

# 1.3 Agent status

The agent status, along with the state timer indicating the length of time in the current state, is shown in the call control widget.

**Note:** States presented are dependent on Genesys Cloud configuration and license type, e.g., *Communicate* users do not see On Queue.

***	OneView	Home	$\sim$		
Q E	nter name or number			a litavianski stratilavianski stratila	● At my desk 11:23 ▼

### **Changing state**

The agent state is changed using the drop-down menu.

Q Enter name or number	Home				At my de	sk 1:36:40 ▼
Recent Items (1)	Today's Ta	sks	,≡ ▼ Welc	On ome to Or <sub>Bus</sub>	Queue y ▶	6(65),6
Burlington Textiles Corp of J       Type     Customer - Dir       Phone     (336) 222-700       Website     Account O       Account Site     Industry	po A	today. Be a go-getter, and che soon.	Admin /doc/a User G		ak 🕨	cloud.com pud.com
		View All				-

### State synchronization

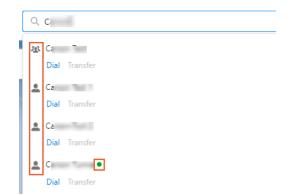
Changing the state in Salesforce changes the state in Genesys Cloud simultaneously, or vice versa.

२ Enter name or number		● On Queue 17:50 ▼		Available
Burlington Textiles Corp of America Type Customer - Direct Phone (336) 222-7000 Website Account O Admin User Account Site	Today's Tasks For a go-getter, and check back soon.	Welcome to OneView! Documentation Admin Guide: https://oneview.avtexcloud.com /doc/admin.pdf User Guide: https://oneview.avtexcloud.com /doc/user.pdf		Busy Away Break Meal Meeting Training
Industry Apparel	View All		G G	17m 49s

# 1.4 Directory

The directory is used to search for a Genesys Cloud contact - whether that be to facilitate a transfer or make an outbound call. Individuals and queues are indicated by their icon; Agent status is displayed with the name.

Note: Status is not shown when an agent is Offline.

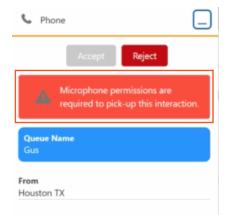


Directory contacts can be:

- added to an existing call as a participant. See Add participant.
- dialed as an outbound call on behalf of a queue. See *Outbound on behalf of a queue*.
- dialed directly. See Direct dial.
- selected for a transfer.

# 1.5 Accept an interaction

**Important**: For inbound, outbound, and auto-answer scenarios, the **Accept** button will be disabled if the microphone is blocked. An error message will prompt users to enable microphone permissions to accept interactions.



An incoming alert appears in the CTI phone, if the **Disable Alert Panel** in the OneView settings page is not enabled by the administrators; else, the incoming alert will utilize Genesys embedded framework interface.

**Note**: When an interaction alert is triggered, the CTI panel automatically pops out in a separate window, provided this feature has been configured by admins in the OneView settings page.

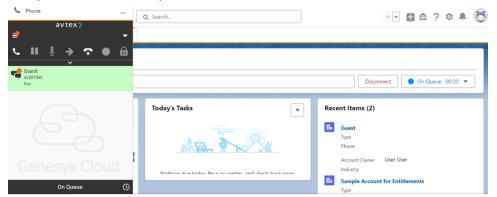
	٩ د	🌜 Phone 🕑
	Q. Sear	Accept Reject
OneView Ho	e V	Queue Name Gus
<b>1</b> 832 3774455		From 832 3774455
Alerting 00:00 Q Search a name	r number	Queue Name Gus
<b>%</b> 832 3774455	Too	

#### **Disable Alert Panel**

Incoming alert appears in the CTI phone, when **Disable Alert Panel** is not enabled. Click **Accept** or **Reject**.

Se Phone		Q Search	*• 🖬 🚓 ? 🏟 💻 🐻
Accept Reject			
Queue Name Gus		NIII ( ) IN ( //// AND ( NIII ( NIII ( ) IN ( ) // ( ) ( ) ( //	##\$11617.\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\
From Guest			Disconnect 🕑 On Queue 02:19 🔻
Queue Name Gus Provider	-1	Today's Tasks	Recent Items (0)
PureCloud Messaging			Welcome to OneView!
			Documentation
	i	Nothing due today. Be a go-getter, and check back soon.	Admin Guide:
OneView (On Queue)		rouning due today, be a go-gettel, and check back sound.	

Incoming alert appears through the default embedded framework, when **Disable Alert Panel** is enabled. Click the phone icon to accept the interaction.



All interactions arrive in the same way; the interaction type, queue name, and customer contact is visible.

Multiple interactions can be accepted based on Genesys Cloud utilization configuration. The relevant interaction controls are provided on each interaction tab. Presently, support is only available for 15

primary tabs to be open concurrently; performance issues may be experienced if more than 15 tabs are open.

**Note:** If auto answer for voice calls is enabled in Genesys Cloud, an alert indicates the incoming call prior to being automatically connected.

Once an interaction is accepted, the OneView embedded controls component is displayed. Administrators may alter the location for your org. Controls shown are dependent on the interaction type.

	*** CustomerName	
OneView Embedded	Total 0034 🔍 Search a name or number 2 participants (0 held) Mute Hold Disconnect III 😸 😰 🔒 Select wrap up code 🔍 💿 On Qu	ueue 04:05 🔻
Controls	Account + Follow Edit Change Owner	Delete 🔻
	Phone     Account Owner     Industry     Billing Address     User User	
Genesys Cloud CTI Phone	avtex) =	
1 Holle	CONNECTED Phone Connected	1
	*1/035959681 Fax 0ws_QA2 217	1
	Website	1
	Employees	1
	Genesys Cloud.	1
	On Queue Ø	
	C OneView (On Queue)	

**Note:** Interaction controls are also available in the Genesys Cloud CTI phone. These duplicate the OneView controls; however, using some functions results in being directed to Genesys Cloud in a separate browser window thereby no longer using OneView within Salesforce. For information on the Genesys Cloud CTI phone functionality, see <a href="https://help.mypurecloud.com/articles/call-controls/">https://help.mypurecloud.com/articles/call-controls/</a>.

# 1.6 Reject or miss an interaction

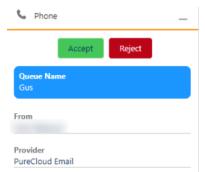
If an interaction is rejected or unanswered, it is returned to the queue. OneView changes the agent state to Not Responding and provides options for how to proceed – Go Back on Queue or Go Off Queue. The alerting timeout length is configured in Genesys Cloud. When users reject or miss a call, the CTI panel remains visible to communicate the users are in Not Responding status.

**Note:** When Genesys Cloud Communicate users reject or miss a call, they are returned to Available status.

SoneView	Search	*• 🖶 ? 🌣 🐥 🔯
avtex> ≡ •		
<u>、॥ ≹ → ⊽ ● ⊕</u> ,		Available 03:55 🗸
Not Responding Go Back On Queue Go Off Queue	Today's Tacks	Welcome to OneView!
	Nothing due today. Be a go-getter, and check back	Admin Guide: https://oneview.avtexcloud.com /doc/admin.pdf User Guide: https://oneview.avtexcloud.com /doc/user.pdf
Genesys Cloud.	soon. View All	
On Queue 🥝		
ConeView (Available)		

# 1.7 Displayed Interaction Details

Interaction attributes, defined by an administrator in the OneView settings page, are visible to the agent upon receiving an interaction. By default, attributes configured within the default queue are displayed.



Based on the custom attributes configured, the agent will have the ability to view and analyze customer's information before accepting an interaction. The configured attributes are displayed as fields on the **CTI phone** and in the **Accept/Reject** screen pop alert.

<b>&amp;</b> Phone			_
	Accept	Reject	
Queue Name Gus	2		
From N			
Queue Name Gus			
Provider PureCloud Em	ail		
Connected Tin Wed Sep 20 2 Daylight Time	023 15:55:5	7 GMT-0500	(Central

When a transfer happens, the **Queue Name** field changes to **Transferred From Queue(s)**. It displays the queue name(s) it is been transferred from.

#### Notes:

- Agents will need to refresh the browser or log out for the changes to reflect.
- If many custom attributes are selected, increase the size of the embedded phone in the lightning app page.

# 1.8 OneView voice controls

	LACING.												
Total 00:56	Q. Search a name or number	2 participants (0 held)	Mute	Hold	Disconnect		i 2	a Name	Q Related To	Q	Select wrap-up code	۹ 🔵	On Queue 02:10 🔻
		-	6	6	-0-	-8-6		11 12			•		15

- 1. Customer caller ID: May show customer name, phone number, or system generated ID.
- 2. Interaction timer: Displays the time accrued for the interaction since connecting.
- 3. **Directory:** Search for a contact within the Genesys Cloud org. See *Directory*.
- 4. **Participant list:** Click to see details of all participants on the call. Participant name is pulled from Genesys Cloud contacts based on the participant's number; if no contact exists, the phone number displays.

	2 Participants	Mute	Hold	Disconnect
ſ	€ Connected +	1403		$C \ge lic$
	💄 Connected N	le		

- 5. **Mute:** Mutes the agent and toggles between mute and unmute.
- 6. **Hold:** Places participant(s) on hold and toggles between Hold and Retrieve, indicating on the participant list the count of participants held.

🌿 636 🗾 5 (held)		
Total 01:17 Held 01:07	2 participants Mute Retrieve	Disconnect III 🛍 😰 🍙 Name Q Related To Q Select wrap-up code Q 🔵 On Queue 59:24 🔻
	📞 Held +1636	
لا 63	🔔 Held Me	this contact

- 7. **Disconnect:** Ends the call. See *After call work / wrap up*.
- 8. **Keypad:** Provides entry of DTMF commands on a call and toggles open and closed.

Di	sconnect	٦	<u>.</u>	
		2	3	
		ABC	DEF	у
	4	5	6	
	GHI	JKL	MNO	
	7	8	9	
	PQRS	TUV	WXYZ	
	*	0	#	
		+		520

- 9. Schedule a callback: Allows the agent to add and schedule a callback. See Schedule a callback.
- 10. Notes: Allows the agent to add and view notes for the call. See *Notes*.
- 11. Secure Pause: Allows the agent to pause the recording of a voice interaction. See Secure pause.
- 12. Name: Drop-down list to select the participant name associated with the interaction.\*
- 13. Related To: Drop-down list to select the related objects associated with the interaction.\*
- 14. Wrap-up code: Drop-down list to select a wrap up code for the call. See After call work / wrap up.
- 15. **Agent state & timer:** Displays the agent's current state and the length of time in the state. See *Agent status*.

\* Only available if Task Logging has been enabled by administrators.

# 1.9 OneView chat and message controls

😰 Guest		TES AUTO TE ANALY THE TEAS			22 - XVIXII - XXXXX 70000
Total 00:33 Waiting 01:08	Q. Search a name or number	Disconnect 😰 Name	Q Related To	Q Select wrap-up code	Q On Queue 05:39 🔻
2 3	4	567	8	9	10

- 1. **Customer name:** Customer name as entered by the customer in their message.
- 2. Interaction timer: Displays the time accrued for the interaction since connecting.
- 3. **Chat state timer:** Displays the time since the last response.
  - Waiting: Time agent has been waiting for a customer response.
  - Replied: Time since last customer message received.
  - ACW: Time in after interaction work. I.e., the time since ending the interaction.

- 4. Directory: Search for a contact within the Genesys Cloud org. See Directory.
- 5. **Disconnect:** Ends the interaction with the customer. Agent transitions to ACW.
- 6. Notes: Allows the agent to add and view notes for the interaction for transfers. See *Notes*.
- 7. Name: Drop-down list to select the participant name associated with the interaction.\*
- 8. Related To: Drop-down list to select the related objects associated with the interaction.\*
- 9. Wrap-up code: Drop-down list to select a wrap-up code for the interaction.
- 10. **Agent state & timer:** Displays the agent's current state and the length of time in the state. See *Agent status*.

\* Only available if Task Logging has been enabled by administrators.

# 1.10 OneView email controls



- 1. **Customer ID:** May show customer name or email address.
- 2. Interaction Timer: Displays the time accrued for the interaction since connecting.
- 3. **Directory:** Search for a contact within the Genesys Cloud org. See *Directory*.
- 4. **Disconnect:** Ends the interaction.
- 5. Notes: Allow the agent to add and view notes for the interaction. See *Notes*.
- 6. Name: Drop-down list to select the participant name associated with the interaction.\*
- 7. Related To: Drop-down list to select the related objects associated with the interaction.\*
- 8. **Wrap-up code:** Drop-down list to select a wrap-up code for the call. See *After email work / wrap up*.
- 9. **Agent state & timer:** Displays the agent's current state and the length of time in the sate. See *Agent status*.

\* Only available if Task Logging has been enabled by administrators.

# 1.11 Notes

The Notes field allows the agent to add and view notes for the call. Notes can only be added before the call is transferred or wrapped up and marked **Done**.

When receiving a transferred interaction, the icon has an orange indicator.

	لات 403 م	
Tot	Total 01:23 Q. Search a name or number 2 participants (0 held)	Mute Hold Disconnect III III III Content Select wrap-up code Q On Queue 07:01 V
A	Agent Joe	
	Transferring to queue 2. Current agent's name	
	My notes.	
		ß

A new **Pop Task and Save button** has been introduced within the Notes section. Based on the configuration set by your admin, the button will be shown within the Notes section.

Important: Currently supports only chat and call interactions.

When enabled by the admin, the **Pop Task and Save** button becomes available. Clicking the button, will open a task record associated with the account in a new tab.

#### 

#### Disabled by admin:

र <del>(</del>	
Q. Search a name or number	2 participants (0 held)
Total 00:09 Unmute Hold Disconnect III 📾 😰 🖨 🔍 Name 🔍 Related To 🔍 Q. Select wrap-up code	On Queue 03:16 💌
Né	
Enter notes here	ß

# 1.12 Get Transcript

The Get Transcripts feature is available for chat and inbound calls only when task logging is enabled by admins in the OneView settings page. This feature can be accessed within the tasks related to interactions, allowing you to retrieve and review transcripts as needed.

**Note**: For email and outbound calls the feature is not available. Since these interactions are not yet transcribed, the transcripts will not display any data.

To access Transcripts once the conversation is disconnected, follow the steps below:

- 1. Navigate to the **Home** drop-down.
- 2. Select **Tasks** from the drop-down.

- 3. Select the task for which you want the transcript. Task will be displayed in a new tab with the **Get Transcript** button.
- 4. Click Get Transcript.

•••• OneView	Tasks	✓ ĭ≡ voice	inbound - Gus 🗸 🗸			
Q Search a name or number						● On Queue 00:55 ▼
OneView			Details Related	11/ 75/	11 11(8-) \	
	G	et Transcript	✓ Task Information			
			Assigned To		Related To	1
			Subject voice inbound - Gus		Name	1
			Due Date			
			Comments			1

# 1.13 Screen pops

Depending on how Genesys Cloud and Salesforce have been configured by administrators, Accounts, Tasks, Cases, Leads, and/or unique URLs may be automatically generated for the agent as primary tabs or sub tabs.

### Examples:

**Account screen pop:** upon accepting an inbound interaction, an account is located or a new one created.

OneView Home	✓ ■ Acme ✓ ×	
Total 00:46 Q Search a name or number	2 Participants       Mute       Hold       Disconnect       III       IIII       III       IIII       IIIII       IIII       IIII       IIIII       IIIIII       IIIII       IIIIII       IIIII       IIIIII       IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	✓ 100 mm (C)
Account Acce A	+ Follow Edit Change Owner Delete	•
Type Phone Website	Account Owner Industry Billing Address User User 🔊	
Details Related		
Account Owner User User	Phone	ŕ
Account Name Acme	Fax	P

**Task screen pop:** upon disconnect of an interaction, a new Task record is created for the agent.

OneView	Home	∽ I Acme	~ ×				
📰 Acme 🎽 🔽	ice inb						
Ľ							
Total 00:38 ACW 00:05	Search a name or number				💼 😰 Select wrap-	up code Q Done	● On Queue 10:30 ▼
Task voice inbound - 2	2021-05-11, 5:21 p.	m.			✓ Mark Complete	Create Follow-Up Task	Edit Edit Comments 👻
Name Related To							
Details Related							
✓ Task Information				Dulue J T-			

# 2 Voice interactions

# 2.1 Transfer a voice interaction

Transfers may be initiated as Blind or Consult. Both methods provide support to transfer the focused tab and notes only when **Allow Workspace Transfers** is enabled in the OneView Settings page.

Allow Workspace transfer	Embedded Controls	CTI Panel
Enabled	• When initiating a transfer from a tab, the agent has a workspace transfer checkbox enabled. Upon, transferring only the focused tab is transferred to the recipient.	• When initiating a transfer from a tab, the agent has a workspace transfer checkbox enabled. Upon, transferring only the focused tab is transferred to the recipient.
	<ul> <li>Agent has the ability to toggle it off prior to transferring an interaction.</li> <li>When completing transfer, no tabs will transfer to the receiving agent.</li> </ul>	<ul> <li>Agent has the ability to toggle it off prior to transferring an interaction.</li> <li>When completing transfer, no tabs will transfer to the receiving agent.</li> </ul>
Disabled	• Agents do not have the Workspace transfer option visible in OneView embedded controls; when completing transfer, no tabs will transfer to the receiving agent.	• Agents do not have the Workspace transfer option visible in CTI panel; when completing transfer, no tabs will transfer to the receiving agent.

**Note:** If the agent initiates a transfer from a tab without embedded controls or when the home page is in focus, the transfer workspace checkbox will not be available to transfer the tabs in either the CTI panel or embedded controls.

### **Transfer screens**

- Blind transfer: the third party receives the focused tab along with the incoming call.
- Consult transfer: the consulted participant receives the focused tab when connected on the consult call.

### Transfer notes

Using the *Notes* function, the agent can add details to the call before transferring.

### 2.1.1 Blind transfer

Transfers the current call directly to a third party without first speaking to them. Also known as a single-step or cold transfer.

1. Using the directory search, enter a name or number to start a search.

otal 06:23	Q gus	2 participants (0 held) Mute Hold Disconnect 🔛 💼 😨 🔒 Select wrap-up code Q On Queue 05:20 🔨
Account Acme		+ Follow Edit Change Owner Delete
rpe F	Dial Transfer Add Participant	wner Industry Billing Address r_≟ <sup>5</sup>

2. Below the selected participant, click **Transfer** and then **Blind**.

ષ		
Total 01:22	Q gus	2 participants (0 held) Mute Hold Disconnect 🇱 🛱 😰 🔒 Select wrap-up code Q 🔵 On Queue 05:20 🔻
Account Acme	La gus Dial Transfer Add Participant & Gus	+ Follow Edit Change Owner Delete ▼
Type P	Dial Transfer Add Participant	wner Industry Billing Address f 🖈
Details Account On	Legal Cus_QA 2 Dial Transfer Add Participant	Phone

*Result:* The recipient receives only the focused tab along with the call as it is transferred.

3. Proceed to After call work / wrap up.

### 2.1.2 Consult transfer

Calls a third party and allows the opportunity to speak to them before transferring the current call to them. Also known as a two-step or warm transfer.

- 1. Using the directory search, enter a name or number to start a search.
- 2. The participant status can be seen prior transferring the call.
- 3. Below the selected participant, click **Transfer** and then **Consult**.

**Note:** Disconnect button is not available when a consult transfer is performed.

۲ و		
Total 01:33	Q, doc	🗞 🛛 2 participants (0 held) 🔹 Unmute 🛛 Hold 🔹 Disconnect 🔛 📾 😰 🔒 Select wrap-up code 🔍 🔵 On Queue 02:04 💌
لا 6	Doc Agent     Transfer Blind Consult Cancel	ontact

*Result:* A transfer interaction appears in the CTI panel and options to Connect All, Complete Transfer or Cancel Transfer are available.

Note: The recipient receives only the focused tab along with the call as it is transferred.

4. Agent can choose **Connect All** to place all the participants in one conversation. The agent can then introduce the caller to the recipient and provide any necessary information.

😢 Indian	apolis IN					- 7 × × 1 (77		
Total 00:43	Q, ri	$\otimes$	3 participants	Complete Transfer	Cancel Transfer	Connect All	Mute Hold	● On Queue 01:07 ▼
				S Phone		_		
				a E	vtex>	•		
				<ul> <li>■ §</li> </ul>	<b>→</b> ∵ (			
				Transfer CONNECTED 0:16				
				Voicemail				
				Indianapolis CONNECTED +13172222222				
					Available	uu. O		

5. After the consult transfer is performed, **Complete Transfer** and **Cancel Transfer** options are available for the agent to exit the call and leave the caller with the consulted party.

🔮 Doc Age	nt						
Total 00:23	Q. 1317222222	3 participants (0 held)	Complete Transfer	Cancel Transfer	Connect All Unmute Ho	d III 🔒	● At my desk 42:27 ▼

- 6. Once transfer is performed and the agent exits the call, the consulted party caller id is displayed to match the CTI panel.
- 7. See After call work / wrap up.

# 2.2 Conference / merge a voice interaction

Conferences may be initiated two ways: add a new participant or merge an existing separate active interaction.

### 2.2.1 Add participant

Adds a third party to the call immediately.

- 1. While on a call, search for a contact in the directory.
- 2. Click Add Participant.

Q develop							
	•	WFM Developer					
		Dial	Transfer	Add Participant			

**Note:** If the existing caller is on hold, they are retrieved when Add Participant is clicked. If the agent would like the existing caller to remain on hold while the second call is made, click Dial instead and follow the Merge calls process to control when the new participant is added into the call.

### 2.2.2 Merge calls

Brings together multiple calls in a conference call. An agent may have answered another incoming call or dialed another party they wish to conference together.

When an agent has multiple active calls, each interaction provides the **Merge Calls** button. Calls may be brought together from any interaction.

- 1. Click Merge Calls.
- 2. Select the name of the party to merge into the call and click Merge.

🕊 403 held)	😍 Other agent				
Total 00:22 Q. Search a	name or number	2 participants (0 held)	Merge calls Mute Hold	Disconnect 📰 📾 😰 🔒 Select wrap-up code 🔍	● On Queue 05:48 ▼
😋 Calgary AB		Acc: 40;	V +1403 Merge calls	+ Follow Edit Chan	nge Owner Delete 💌

Result: All parties are brought together.

Calgary AB							
Total 00:50 🔍 Search a name or number 3 participants (0 held) Mute Hold Disconnect 🔛 👼 🚱 Select wrap-up code 🔍 🔵 On Queue 06:16 🔻							
💄 Connected Me							
📞 Calgary AB		Connected +1403	+ Follow Edit Change Owner Delete V				

# 2.3 Receive a transfer or conference

A transferred call presents to the agent like any other incoming call.

• Notes added to the interaction by a previous agent are indicated to the receiving agent. Click to view.

🕊 Agent Joe		
Total 14:03 Q S	earch a name or number 2 participants (0 held) Mute Hold Disconn	ect 🔠 💼 😰 🔒 Select wrap-up code 🛛 🔍 🔵 On Queue 00:01 💌

• Wrap-up codes presented correspond to the original queue the interaction entered. If the receiving agent is not a member of that queue, default wrap-up codes are presented.

# 2.4 Make an outbound voice call

Outbound calls may be made on behalf of a queue or direct to external or internal parties.

**Note:** The "On behalf of a queue" option is not available to Genesys Cloud *Communicate* users.

### 2.4.1 Outbound on behalf of a queue

- 1. Using the directory search, enter a phone number or search for a contact and click **Dial**.
- 2. Click On Behalf of Queue.

Q +1 832-377-4453	● On Queue 08:05 ▼
Let 1 832-377-4453 Dial Direct On Behalf of Queue Cancel	

3. In the window, select the queue to dial from and click **Dial**.

	Dial On Behalf of Queue	
Select a queue		
Test		\$
	Dial Cancel	

*Result:* The call is made. While the call is ringing, the status shows Dialing.

🐫 Houston TX		
Dialing 00:06	l, Search a name or number 2 participants (0 held) Mute Hold Disconnect IIII (1) (2) (2) (2) (2) (2) (2) (2) (2) (2) (2	de

Once connected, the status shows Alerting and timer resets to show the call timer.

🔮 Housto		
	Q Search a name or number	
Total 00:15	2 participants (0 held) Mute Hold Disconnect III 🗃 😰 👜 Q. Name Q. Related To Q. Select wrap-up code 🔵 On Queu	ue 08:50 🔻

**Note:** As this call is made on behalf of a queue, the agent is put into After Call Work when the call is disconnected. See *After call work / wrap up*.

### 2.4.2 Direct dial

1. Using the directory search, enter a phone number or search for a contact and click **Dial**.

**Note:** If the agent already has an active call, the Transfer and Add Participant options are also available.

### 2. Click Direct.

Q +1 832-377-4453	● On Queue 04:44 ▼
<ul> <li>+1 832-377-4453</li> <li>Dial Direct On Behalf of Queue Cancel</li> </ul>	

*Result:* The call is made. While the call is ringing, the status shows Dialing.

C Gus_QA 1					
Total 00:13 Q. Search a name or number	1 Participants	Mute	Hold	Disconnect	● On Queue 00:36 ▼

Once connected, the status shows Total and the timer resets to show the call timer.

😍 Houston TX	
Total 00:06 Q. Search a name or number	2 participants (0 held) Mute Hold Disconnect III a On Queue 05:20 🔻

**Note:** As a direct call is not attributed to a queue, the agent is not put into after call work when the call is complete.

### 2.4.3 Click-to-dial

Click-to-dial functionality is a Salesforce feature allowing users to click customer contact numbers displayed as links.

- 1. Click a contact phone number within a Salesforce page.
- 2. The CTI phone frame pops up to indicate the call is being made.

Inbound - BasicQueue - +15873923860	Comp	Edit Comments	Change Date	Create Follow-Up Task	
ame Related To dna Frank		🖽 Edna Frank 🗘	A	×	
		Title	Account Name		
Details Related		VP, Technology	GenePoint		
		Phone (403) 776-3270	Email efrank@genepoir	nt.com	
✓ Task Information		Mobile	Contact Owner		
Assigned To	Related To	(650) 867-7686	Admin User		
assigned to	nelated 10				
Subject	Name	Cases (2+)			
Inbound - BasicQueue - +15873923860	Edna Frank				
Due Date		00002993			
12/3/2018		Subject:			

**Note:** If the Genesys Cloud setting "*Prompt for queue on click-to-dial*" is enabled, the CTI phone frame requests the queue selection before proceeding with the call. For more information, see <a href="https://help.mypurecloud.com/articles/configure-click-to-dial/">https://help.mypurecloud.com/articles/configure-click-to-dial/</a>.

# 2.5 Schedule a callback

Callbacks can be scheduled on a callback interaction or a voice interaction. Only one callback can be scheduled on an interaction.

1. Click the Schedule Callback button.

OneView	Home	V 📞 Guest	~ X	
📞 Guest	😴 Task 🗸 🗸 🗸			
<b>%</b> 4031000000				
Total 01:56 Q Sea	rch a name or number		Dial: +1403 End Callback 💼 😰 Select wrap-up code Q 🌢 At my desk 002	28 🔻

Note: If the Schedule Callback button is unavailable (gray):

- a callback may already be scheduled on the interaction, or
- you do not have the required permission. See *Schedule a callback button is gray*
- 2. Select the appropriate details for the callback:
  - Date: type or select the date. Note: A callback cannot be scheduled for more than 30 days in advance.
  - Time: type or select the time

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• **Time zone**: select the time zone of the contact

- **Phone number**: If the contact wants the callback to a different number, enter the number the contact prefers.
- **Route callback to me if possible**: Select to route the callback to yourself. If you are not available, or this is not selected, the callback is directed to the next available agent in the queue that received the original interaction.

End Callback	🗐 😰 🛛 Select wra
Date	Time
Feb 28, 2022 🛗	4:00 PM
Time zone	
America/Edmonton	n (-07:00) Q
* Phone number	
+1403	
Route callback to	me if possible
Schedule	e callback

#### 3. Click Schedule callback.

*Result:* The Schedule Callback icon turns gray.

Note: Callbacks can also be scheduled from the CTI panel.



# 2.6 Secure pause

Clicking the secure pause button allows the agent to pause the recording of a voice interaction so private information (e.g., credit card number) is excluded from the recording. The agent still hears the customer, but Genesys Cloud does not record the conversation. Click the secure pause button again to resume the recording.



# 2.7 After call work / wrap up

After a queue-related interaction is disconnected, the widget displays the ACW time. Depending on Genesys Cloud configuration, the timer may show elapsed time or the countdown timer. The wrap-up codes presented are based on Genesys Cloud configuration.

۲. Contraction of the second	X 2011		
Total 01.06 ACW 00.12 Q. Search a name or number		Select wrap-up code Q	Done On Queue 50:46 🔻

For contextual tabs, the primary tab's interaction icon changes to a notes icon, and a timer displays the wrap-up duration in increments of 30 seconds.

When the wrap-up is complete, the notes icon displays as it did originally, and the timer disappears.

🕏 Guest 1m	~ ×
₽ Guest 1m	≚≡ message ∨ ×
ወ Guest	
Total 17:10 Acw 01:05	Q Search a name or number

1. Enter notes for the interaction. See *Notes*.

<b>%</b> 403	
	Q. Search a name or number 🛛 🗂 🖬 😨 Select wrap-up code 🔍 Done 🔵 On Queue 03:25 👻
Agent's name My notes.	li l

2. Select the wrap-up code and click **Done**. If there are many codes, type in the wrap-up field to filter the results displayed.

æ	Other Inquiry	•	Done
	Billing Issue		
~	V Other Inquiry	v	v-Up Task
	Support		
	Transferred to Wealth		

**Note:** The Done button is not active until the wrap-up code is selected.

3. The details of the interaction are populated on the task record page, if configured by administrators.

# 3 Callback interactions

# 3.1 Respond to a callback interaction

Upon receiving a callback interaction, it can be:

- Transferred to another queue or agent. See *Blind transfer*.
- Rescheduled for another time. See *Schedule a callback*.
- Dismissed if it is determined the callback is no longer required. See *Dismiss a callback*.

To proceed with making the callback to the contact:

1. Click the displayed phone number button to dial the number. If required, select the appropriate number from the drop-down list of numbers.

0neView	Home	🗸 💪 Guest	~ ×				
<b>Guest</b> STa	isk v X						
<b>403</b>	me or number			Dial: +1403	End Callback 📸 😰 Sel	ect wrap-up code Q At my desk	00:28 🔻
<b>403</b>							
S Phone	_						
Avtex)	•						
📞 OneView (At my desk)							

*Result:* The outbound call to the customer is generated.

- 2. Once the call connects, the OneView call controls are available as with any voice interaction. See *Voice interactions*.
- 3. To end the call, click **Disconnect**.
- 4. Complete after call work, select the wrap-up code, and click **Done**. See *After call work / wrap up* for additional information.
- 5. To complete the interaction and dismiss the callback, click **End Callback**.

**Note:** Callbacks can also be initiated from the CTI panel. See <u>https://help.my</u>purecloud.com/articles/place-transfer-dismiss-callback/.

S Phone _
avtex> ≡ •
<ul> <li>□</li> <li>□</li></ul>
Name Not Provided
+1403
Name Not Provided CONNECTED Gus_QA 1 1:54
ر
Available 🥑
ConeView (At my desk)

# 3.2 Schedule a callback

Callbacks can be scheduled on a callback interaction or a voice interaction. Only one callback can be scheduled on an interaction.

1. Click the Schedule Callback button.

OneView	Home	🗸 📞 Guest	~ ×			
📞 Guest	😴 Task 🗸 🗸 🗸					
<b>%</b> 4031000000		~7~~ / \\\   \ _				
Total 01:56 Q Sea	rch a name or number			Dial: +1403 End Callback	Select wrap-up code	Q At my desk 00:28 🔻

Note: If the Schedule Callback button is unavailable (gray):

- a callback may already be scheduled on the interaction, or
- you do not have the required permission. See Schedule a callback button is gray
- 2. Select the appropriate details for the callback:
  - **Date**: type or select the date. **Note:** A callback cannot be scheduled for more than 30 days in advance.
  - Time: type or select the time
  - Time zone: select the time zone of the contact
  - **Phone number**: If the contact wants the callback to a different number, enter the number the contact prefers.
  - Route callback to me if possible: Select to route the callback to yourself. If you are not available, or this is not selected, the callback is directed to the next available agent in the queue that received the original interaction.

End Callback	🔋 😰 🛛 Sel	ect wr
Date	Time	
Feb 28, 2022 🛗	4:00 PM	0
Time zone		
America/Edmonton	(-07:00)	۹
* Phone number		
+1403		
Route callback to	me if possible	
Schedule	e callback	

#### 3. Click Schedule callback.

*Result:* The Schedule Callback icon turns gray.

Note: Callbacks can also be scheduled from the CTI panel.



# 3.3 Dismiss a callback

To dismiss a callback without calling the customer or transferring the interaction, click **End Callback**.

**Note:** When End Callback is clicked before you place the call, Genesys Cloud cancels the callback and does not route the interaction back to the queue.

# 4 Outbound campaign interactions

When an outbound campaign interaction is routed to your queue, it can be accepted or rejected like any other interaction. See *Accept an interaction* or *Reject or miss an interaction*.

Note: The agent script associated to the campaign is accessible via the CTI panel.



# 4.1 Handle an outbound campaign call

- 1. When you receive a routed outbound campaign call, the same call controls are available as with any voice interaction. See *Voice interactions*.
- 2. To end the call, click **Disconnect**.
- 3. Complete after call work, select the wrap-up code, and click **Done**. See *After call work / wrap up* for additional information.

# 4.2 Place a call for a preview campaign

When you receive a routed **preview** campaign call, you have the opportunity to review the information or agent script prior to connecting to the contact.

During preview, you can:

- *Schedule a callback* for another time.
- *Blind transfer* to another queue or agent.
- If administrators have allowed skipping of preview calls, the Skip button will be available. If it's determined the outbound call is not required, click **Skip**. The interaction is considered closed and not put back into the campaign queue.

**Note:** When a preview campaign is configured with a fixed amount of time to review the record, the countdown timer appears in the OneView call controls. When the timer expires, the contact is automatically dialed.

Customer	1111,
Total 00:59	
📞 Customer	0 J / //

### To proceed with making the outbound call to the contact:

1. Click the displayed phone number button to have the system dial the contact's telephone number for you. If the contact has multiple numbers, a drop-down menu is available.

📞 Customer	
Total 00:23 Q Search a name or number	Dial: +15875550148 Skip 🗃 😰 Select wrap-up code Q 💿 On Queue 00:40 🔻

*Result:* The outbound call to the customer is generated.

2. Once the call connects, the OneView call controls are available as with any voice interaction. See *Voice interactions*.

C Dente	ny similaran Al	
Total 02:52	Q. Search a name or number	2 participants (0 held) Mute Hold Disconnect III 🛍 🖬 🖗 🔒 Select wrap-up code 🔍 🔵 On Queue 03:09 🔻

3. To end the call, click **Disconnect**.

*Result:* The after call work timer starts.

- 4. Complete after call work, select the wrap-up code, and click **Done**. See *After call work / wrap up* for additional information.
- 5. To complete the interaction, click **End Preview**.

# 5 Chat interactions

# 5.1 Respond to a chat

OneView	Home 🗸	🗭 chat - 30s 🛛 🗸 🗙	Adeline	Morandini 30s 🗸 🗙	
Adeline Morandini Total 19:26 Waiting 01:13	Search a name or number				
Adeline Morandini			"	Account Adeline Morandini A	
	Adeline Morandini joined 16:43 You joined 16:43		î	Type Phone Website	Account Owner Ind User User a
16.44 Advine Morandra Hi, I have a question about my	bil	The Hello, how can I help ye Hello, how can I help ye (f see. What would you like to bro	DU?	Details     Related       Account Owner	
1533 Addres Merseda (My bill seems high)	Adeline Morandini is typing	Let's have a lo	1855 <b>xok</b> –	Type Industry Description	
Type a message	Presentes encournes il 13 cipility			Billing Address	

The embedded chat interaction component consists of the conversation history and the response field. The size of the response field varies depending on the settings configured by the admin in the OneView settings page.

Type a message in the response field and press Enter.

**Note:** There is a Genesys-imposed limit of 4000 characters per chat. Exceeding this limit will result in an error and the message cannot be sent.

As a customer replies, the bottom of the conversation history window indicates that the customer is typing.

#### Interaction and state timers

The interaction and state timers are located at the top left of the screen.

- The interaction timer is indicated on the left in black text.
- After the agent replies, the chat state timer displays as Waiting, indicating the elapsed time since the agent last replied to the customer. The timer first starts when the agent begins typing to the customer, not when the bot responds. For subsequent responses, the timer will start regardless of whether an agent or a workflow sends the message.
- After the customer replies, the chat state timer displays as Replied, indicating the elapsed time since the customer last replied to the agent.

• When the interaction ends, the ACW timer will start, indicating the elapsed time since the end of the chat.

### **Multiple interactions**

When there are multiple interactions open and a new chat message is received, a red dot displays next to the chat bubble. The indicator disappears once the agent responds to the customer.



### 5.1.1 Spellcheck

When enabled, a web browser's embedded spellcheck functionality highlights misspelled words. If necessary, configure the spellcheck for your web browser.

For detailed steps, see *Configure spellcheck*.

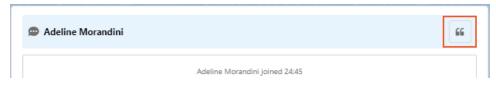
### 5.1.2 Canned responses

Canned responses configured in Genesys Cloud are used in OneView.

See https://help.mypurecloud.com/articles/canned-responses-overview/.

**Note:** Not available for Genesys Cloud *Communicate* users.

1. To access Genesys Cloud configured canned responses, click the **Canned Responses** icon.



2. Enter a search term in the search field or click an item from the list of canned responses, then select the applicable sub-item.

Adeline Morandini		"
Q, Find response		Adeline Morandini joined 13:32
> Appointment		You joined 13:32
✓ Billing Support		Hello
> Address Change	ø	Hi You 13-33
> Custom response	0	How can I help?
> Payment charged twice	8	I've been overcharged
> Payment not received	8	I see. Let's fix that.

3. Click the copy/paste icon to insert the selected sub-item into the message and press Enter.

4. To close the list of canned responses, click the Canned Responses icon again.

For more information on using canned responses, see <u>https://help.mypurecloud.com/articles/use-</u> canned-responses-during-acd-interactions/.

### 5.2 Transfer a chat interaction

Transfers may be initiated as Blind or Consult. Both methods provide support to transfer subtabs and notes.

Transfers to another chat queue are blind transfers but include subtabs and notes.

Note: To transition a chat to a live phone call, see *Make an outbound voice call*.

#### **Transfer screens**

When the agent has subtabs open in Salesforce during a call, the subtabs are transferred to the selected participant.

#### **Transfer notes**

Using the *Notes* function, the agent can add notes to the call before transferring.

To transfer:

- 1. Using the directory search, enter a name or number to start a search.
- 2. Below the selected participant, click **Transfer** and then **Blind**.
- 3. The chat is transferred to a new agent.
- 4. Proceed to After chat work / wrap up.

### 5.3 Receive a transferred chat

A chat transferred from another agent presents in the same way as a regular chat interaction.

Additional details:

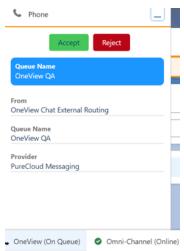
- Notes added to the interaction by a previous agent are indicated to the receiving agent. Click the Notes icon to view.
- Wrap-up codes presented correspond to the original queue the interaction entered. If the receiving agent is not a member of that queue, default wrap-up codes are presented.
- When a chat is transferred from a bot to an agent, the conversation between the bot and the customer is also transferred.

# 5.4 Chat external routing Blind transfer

A Blind transfer can be initiated via chat external routing.

To transfer:

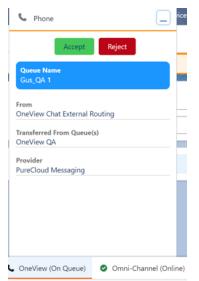
- 1. Set the Omni-Channel status to Online.
- 2. Initiate a Salesforce chat interaction.
- 3. Agent 1 accepts a Salesforce chat routed through OneView Chat External Routing.



4. Agent 1 transfers chat to another queue (chat button).

onversation	Past Chats	Details		
	Tube chorp	octano		
			tor • 8:31:39 p.m.	
Transfer Chat		×		
	er or skill to transfer thi			
Chat Button 🔻	Belect an Option	Q		
Message (optional) Summarize the issue	Chat Button			
	Chat Button 2			
		Transfer		
0				End Cha
e a message				

5. Agent 2 receives transfer through Genesys Cloud.



6. Agent 1 gets disconnected and Agent 2 continues the chat.

OneView	and children of	-cturio			
		<b>@</b> (	Chat started by <b>Visitor</b>	• 5:31:39 PM	
	£	User U sen	it a transfer request to s	Service A • 5:33:37 PM	
		<u>s</u> ` Ser	vice A accepted the ch	at • 5:33:45 PM	
Type a message					End Cha
Type a message					

7. Click the End Chat button to disconnect.

# 5.5 View a past chat conversation

Note: Not available for Genesys Cloud Communicate users.

Transcripts of past chat conversations may be viewed if administrators have configured this option to be available on a record page. For example:

1. Click the drop-down menu beside **Home** and click **Tasks**.

OneView	Home	~
		Home
🌒 Mabel Fujiwara		Accounts
Total 06:12 ACW 05:58	Q Search	Cases
		Contacts
🗩 Mabel Fujiwara	<b>2</b>	Opportunities
	м 🗲	Leads
	(iii)	Tasks
	\$	Orders

2. A list of previous tasks is displayed. Click any task.

16 item	Tasks       Recently Viewed       16 items • Updated a few seconds ago						
		Subject	$\sim$				
1		chat - 2021-06-26, 6:35 p.m.					
2		chat - 2021-06-27, 6:09 p.m.					
3		chat - 2021-06-28, 2:34 a.m.					
4		chat - 2021-06-27, 6:24 p.m.					
5		chat - 2021-06-27, 5:55 p.m.					
6		chat - 2021-06-26, 5:41 p.m.					
7		chat - 2021-06-25, 5:06 p.m.					

3. The details of the task and the chat transcript component are displayed.

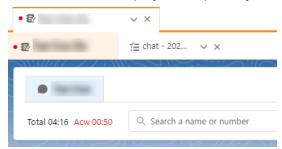
Q. Search a name or number				Available 01:53
ask chat - 2021-07-06, 5:11 p.m.		✓ Mark Complete	Create Follow-Up Task	Edit Edit Comments
ame Related To ichard Phelps Richard Phelps				
réView	Details Related			
hat Transcript	✓ Task Information			
UESDAY, JUL 6, 2021	Assigned To	Related To		
	User User	Richard Phelps		
Richard Phelps joined 15:11	Subject	Name		
Doc Agent joined 15.11	chat - 2021-07-06, 5:11 p.m.	Richard Phelps		
Hello Richard. How can I help you				
IS:13 Richard Pholps	Comments			
Hello. Can you please help me with my account?	ConversationId: 8956d30e-469b-4f3b-acb0-23f6922aa3a8			
Absolutely. What seems to be the problem with your a	Continue Additional Information			
15-16 Richard Photps	Satus			
I need to change my mailing address.	disconnected - 2021-07-06, 5:17 p.m.			
I can do that	Priority			
Richard Phelps left 15:17	Normal			
Doc Agent left 1217	<ul> <li>Other Information</li> </ul>			

### 5.6 After chat work / wrap up

After a queue-related interaction is disconnected, the widget displays the ACW time. Depending on Genesys Cloud configuration, the timer may show elapsed time or the countdown timer. The wrap-up codes presented are based on Genesys Cloud configuration.

Adeline Morandin	i la				
Total 03:04 ACW 01:41	Q. Search a name or number	æ	Select wrap-up code	۹	Done

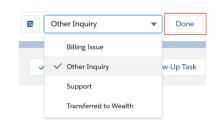
For contextual tabs, a red dot and a notes icon display in the primary tab.



1. Enter notes for the interaction. See Notes.

Adeline Moran	● chat - 202 ∨ ×	
Total 01:02 Waiting 00: Agent's name	46 Q Search a name or number	Disconnect E/ Select wrap-up code Q
Here are my not	tes	

2. Select the wrap-up code and click **Done**. If there are many codes, type in the wrap-up field to filter the results displayed.



**Note:** The Done button is not active until the wrap-up code is selected.

# 6 Message interactions

OneView supports asynchronous messaging (Facebook, WhatsApp, SMS and web messaging) from customers. Unlike chat interactions, which end as soon as the interaction is disconnected, messaging sessions can be resumed at a later time.

If the customer restarts the interaction after this time, it is routed to an agent as a new interaction but will include the message history from the previous interaction.

**Note:** Genesys Cloud *Communicate* users cannot respond to messages; however, they can add notes and/or transfer messages. This behavior is comparable with Genesys Cloud desktop behavior for Communicate users.

### 6.1 Respond to a message

OneView Home	~ \$	🕏 chat - 30s 🛛 🗸 🗙	🗭 Adeline Morandi	ni 30s 🗸 🗙			
Adeline Morandini Total 19:26 Waiting 01:13	a name or number	· _ : (@=%) /					
Adeline Morandini			"	Account Adeline Mora	ndini 🔺		
Ai	deline Morandini joined 16:43 You joined 16:43		▲ Type	Phone	Website	Account Owner User User 🔊	Ind
1644 Adelme Marandel (Hi, I have a question about my bill)		است (Helio, how can I help yo Helio, how can I help yo Tsee. What would you like to know	وری Det Acc Acc Acc Acc Acc Acc Acc Acc Acc Ac	tails Relater count Owner er User eline Morandini ent Account Additional Inform			
1011 Adalah Masadali (My bill seems high)		Ves 1 Let's have a loc	Des	e ustry cription Address Informat	ion		
Type a message			Billi	ing Address			
			v :	System Information	on		

The embedded messaging component consists of the conversation history and the response field. The size of the response field varies depending on the settings configured by the admin.

Type a message in the response field and press Enter. The message icon displays as a gray message bubble with three white dots inside. The component may be re-sized by dragging the bottom right corner near the response field.

**Note:** There is a Genesys-imposed limit of 2000 characters per message for web messaging, and 765 characters for SMS messages. Exceeding these limits will result in an error and the message cannot be sent.

#### Interaction and state timers

The interaction and state timers are located at the top left of the screen.

- The interaction timer is indicated on the left in black text.
- After the agent replies, the state timer displays as Waiting, indicating the elapsed time since the agent last replied to the customer. The timer first starts when the agent begins typing to the customer, not when the bot responds. For subsequent responses, the timer will start regardless of whether an agent or a workflow sends the message.
- After the customer replies, the state timer displays as Replied, indicating the elapsed time since the customer last replied to the agent.
- When the interaction ends, the ACW timer will start, indicating the elapsed time since the end of the message.

**Note:** If the browser is refreshed, alerts and the state timer will not be present on out-of-focus tabs, but will update after the tabs are brought into focus.

#### Handling multiple interactions

When there are multiple interactions open and a new message is received, a red dot displays next to the message bubble. The indicator disappears once the agent responds to the customer.



### 6.1.1 Spellcheck

When enabled, a web browser's embedded spellcheck functionality highlights misspelled words. If necessary, configure the spellcheck for your web browser.

For detailed steps, see *Configure spellcheck*.

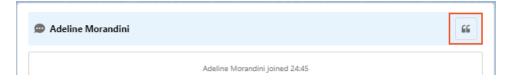
### 6.1.2 Canned responses

Canned responses configured in Genesys Cloud are used in OneView.

See https://help.mypurecloud.com/articles/canned-responses-overview/.

**Note:** Not available for Genesys Cloud *Communicate* users.

1. To access Genesys Cloud configured canned responses, click the **Canned Responses** icon.



2. Enter a search term in the search field or click an item from the list of canned responses, then select the applicable sub-item.

Adeline Morandini		"
Q, Find response		Adeline Morandini joined 13:32
> Appointment		You joined 13:32
✓ <u>Billing Support</u>		Hello
> Address Change	Ø	Hi
> Custom response	ø	How can I help?
> Payment charged twice	đ	I've been overcharged
> Payment not received	٥	I see. Let's fix that.

3. Click the copy/paste icon to insert the selected sub-item into the message and press Enter.

4. To close the list of canned responses, click the Canned Responses icon again.

For more information on using canned responses, see <u>https://help.mypurecloud.com/articles/use-</u> <u>canned-responses-during-acd-interactions/</u>.

### 6.1.3 View emojis

Customers may send emojis from Apple or Android devices. These are embedded within the body of the message.

14038098580	66
+14038098580 September 3, 2021, 24:30	
I have a billing issue	
	Jason Urichuk September 3, 2021, 24:30
	I'll do my best to fix it.
+14038098580 September 3, 2021, 24:31	
Thank you	

Note: OneView does not currently support functionality for agents to send emojis to customers.

### 6.1.4 View images and stickers

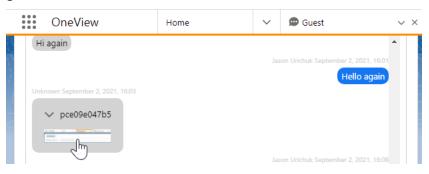
Customers may send stickers and images (e.g., screen captures) to the agent. The file types currently supported are .jpg, .png, and .gif.

**Note:** OneView does not currently support functionality for agents to send stickers or images to customers.

#### **View images**

To view images:

1. In the conversation history window, in the message bubble, click the link to reveal the image icon, then click the image icon.



Result: The image will download.

2. Go to the download location and open the image.

#### **View stickers**

In the conversation history window, click the link in the message bubble.



*Result:* The sticker is presented inside the message bubble.

## 6.2 Transfer a message interaction

Transferred message interactions are blind transfers and provide support to transfer subtabs and notes.

Note: To transition a message to a live phone call, see Make an outbound voice call.

#### **Transfer screens**

When the agent has subtabs open in Salesforce during a call, the subtabs are transferred to the selected participant.

Using the *Notes* function, the agent can add notes to the call before transferring.

To transfer:

- 1. Using the directory search, enter a name or number to start a search.
- 2. Below the selected participant, click **Transfer** and then **Blind**.

- 3. The chat is transferred to a new agent.
- 4. Proceed to After message work / wrap up.

### 6.3 Receive a transferred message

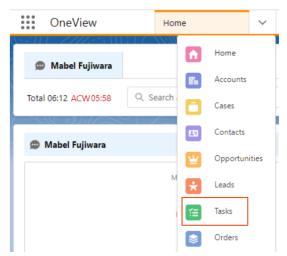
A message transferred from another agent presents in the same way as a regular message interaction. Additional details:

- Notes added to the interaction by a previous agent are indicated to the receiving agent. Click the Notes icon to view.
- Wrap-up codes presented correspond to the original queue the interaction entered. If the receiving agent is not a member of that queue, default wrap-up codes are presented.
- When a message is transferred from a bot to an agent, the conversation between the bot and the customer is also transferred.
- Transferred messages also include any images, stickers, or emojis originally sent by the customer.

### 6.4 View a past message conversation

Transcripts of past chat conversations may be viewed if administrators have configured this option to be available on a record page. For example:

1. Click the drop-down menu beside Home and click Tasks.



2. A list of previous tasks is displayed. Click any task.

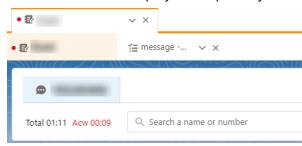
	ently Viewed	
	Subject	$\sim$
1	message -	
2	message -	
3	message - 2021-09-08, 1:13 p.m.	

*Result:* The details of the task and the message transcript component are displayed. Emojis and stickers sent by the customer will also be included in the transcript.

### 6.5 After message work / wrap up

After a queue-related interaction is disconnected, the widget displays the ACW time. Depending on Genesys Cloud configuration, the timer may show elapsed time or the countdown timer. The wrap-up codes presented are based on Genesys Cloud configuration.

ወ Adeline Morandir	าเ					
Total 03:04 ACW 00:12	Q Search a name or number	2	Select wrap-up code	۹	Done	

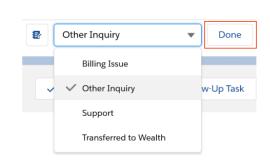


For contextual tabs, a red dot and a notes icon display in the primary tab.

1. Enter notes for the interaction. See *Notes*.



2. Select the wrap-up code and click **Done**. If there are many codes, type in the wrap-up field to filter the results displayed.



**Note:** The Done button is not active until the wrap-up code is selected.

*Result:* The details of the interaction are populated on the task record page, if configured by administrators.

# 7 Email interactions

## 7.1 Preview an email

Agents can preview an email in the embedded email component before replying to or forwarding the email. When previewing an email, agents see:

- the email subject
- the email text
- if there are attachments
- the email sender

Jason (held) Jason					
Total 4:39:09 Q. Search a name or number					
$\mathbb{Z}^{(n)} \to \mathbb{Z}^{(n)} \to Z$					
M Jason					
Reply Forward					
Jason (j : c.com) 2021-11-01 09:26					
Billing issue to: gus@ariasolutionslab.mypurecloud.com					
EmailACWWrapUp.png					
Hi.					
H, I have a problem with my bill. Please see the attached image.					
	Thank you,				
I have a problem with my bill. Please see the atta	ached image.				

### 7.2 Reply to or forward an email

To reply to or forward an email:

Click Reply or Forward.

	$\mathbf{M}$	
Reply Forward	Durch	

A draft email is created.

Γ					66
	Disc	ard		Send	
	То	X Type an email a	address		
	Subject Re: Bill proble			G	
a	Salesforce Sans	▼ 12	• В	I U S	
đ	티 크는 크는 프		. 0 6		
	Hello	e f	g h		
		Include	original mes	sage	

- In the **To** field, enter a recipient email address. Clicking the **To** field also opens the **CC** and **BCC** fields. If there are multiple recipients, use spaces, commas, or semicolons to separate the email addresses. The fields are also searchable (i.e., when you start typing an email address, OneView starts to populate email address suggestions from Genesys Cloud contacts. To remove an email recipient, click the "X" on the email address.
- 2. Modify the **Subject** field, if required.
- 3. Type a message in the draft pane.

**Note:** When replying to a message, to append the original message to your reply, click **Include original message**. The original message is automatically included when forwarding emails.

- 4. Format the email as desired.
  - a. Change the font.
  - b. Change the text size.
  - c. Apply bold, italics, underline, or strikethrough.
  - d. Create a bulleted or numbered list, indent, or outdent.
  - e. Change the text alignment.
  - f. Remove formatting.
  - g. Insert a link.
  - h. Add an attachment.
  - i. Insert an inline image.
- 5. Click **Send**. Replying to or forwarding the email message automatically ends the interaction.
- 6. To discard the draft, click **Discard**. To confirm, click **Discard** again.

Note: Draft emails are not discarded if:

- the page is refreshed while a draft is being composed.
- the agent is handling multiple interactions in a non-contextual tab.

### 7.2.1 Spellcheck

When enabled, a web browser's embedded spellcheck functionality highlights misspelled words. If necessary, configure the spellcheck for your web browser.

For detailed steps, see Configure spellcheck.

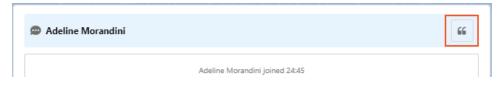
### 7.2.2 Canned responses

Canned responses configured in Genesys Cloud are used in OneView.

See https://help.mypurecloud.com/articles/canned-responses-overview/.

Note: Not available for Genesys Cloud Communicate users.

1. To access Genesys Cloud configured canned responses, click the Canned Responses icon.



- 2. Enter a search term in the search field or click an item from the list of canned responses, then select the applicable sub-item.
- 3. Click the copy/paste icon to insert the selected sub-item into the message and press Enter.

Adeline Morandini		66
Q. Find response		Adeline Morandini joined 13:32
> Appointment		You joined 13:32
✓ <u>Billing Support</u>		Hello
> Address Change	ø	Hi You 13:33
> Custom response	8	How can I help?
> Payment charged twice	Ð	l've been overcharged
> Payment not received	8	I see. Let's fix that.
		13:33 Adeline Morandini

4. To close the list of canned responses, click the Canned Responses icon again.

For more information on using canned responses, see <u>https://help.mypurecloud.com/articles/use-</u> <u>canned-responses-during-acd-interactions/</u>.

#### Signatures

If your administration has configured a "signature" canned response, you can include it at the end of an email.

To enter your signature at the end of an email:

- 1. Click the **Canned Responses** icon to open the list of canned responses.
- 2. Click **Email Signature**. You can click **Signature** to view the signature. Signatures are configured to present the contact information of the agent interacting with the customer.
- 3. Click the copy/paste icon to insert the signature in the draft email.

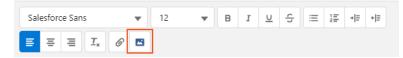
	a "		
Q Find response	Discard Send		
> Appointment	@ .com ×		
> Billing Support	To Type an email address		
> Bridge Tower	Subject Re: Bill problem		
> DanielSMSOutboundTest	Salesforce Sans		
b 🗸 Email signature	B I U 5 ≔ I + +		
✓ Signature			
Customer Service Representative Avtex Solutions service@avtex.com 18006666666	Hello, Please tell me your account number and I'll get back to you. Thanks, Customer Service Representative Avtex Solutions <u>service@avtex.com</u> 18006666666		
> MYTest			
> Subscription			

### 7.2.3 Insert inline image

Agents can insert an inline image into a draft email.

To insert an inline image, in the draft email pane:

1. Click the **Insert image** icon.



2. Select the image you want to insert from the window that opens, then click **Open**. The inline image is inserted into the draft email.

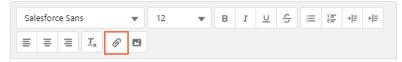
Note: The permitted file types are .jpg, .png, and .gif.

### 7.2.4 Attach a file to an email

Agents can send attachments in an email.

To upload an attachment:

1. Click the **Add attachment** icon in the draft email pane.



- 2. From the file dialogue window, select the file to upload, then click **Open**. The file uploads to the draft email. For larger files, a progress bar indicates upload progress. When the upload is finished, the file will appear in draft email pane.
- 3. To remove an attachment from an email, click the "X" on the attachment.



**Note:** Messages (including attachments) cannot exceed 10 MB in size or they will bounce back to the sender. A list of unsupported attachment types can be found here: <u>https://-</u> <u>docs.aws.amazon.com/ses/latest/DeveloperGuide/mime-types-appendix.html.</u>

## 7.3 Transfer an email interaction

Transferred email interactions are blind transfers and provide support to transfer subtabs and notes.

#### **Transfer screens**

When the agent has subtabs open in Salesforce during an email, the subtabs are also transferred.

Using the *Notes* function, the agent can add notes to the email before transferring.

To transfer:

- 1. Using the directory search, enter a name or number to start a search.
- 2. Below the selected participant, click Transfer and then Blind.
- 3. The chat is transferred to a new agent.
- 4. Proceed to *After email work / wrap up*.

## 7.4 After email work / wrap up

After a queue-related interaction is disconnected, the widget displays the ACW time. Depending on Genesys Cloud configuration, the timer may show elapsed time or the countdown timer. The wrap-up codes presented are based on Genesys Cloud configuration.

- 1. Enter notes for the interaction. See Notes.
- 2. Select the wrap-up code and click Done. If there are many codes, type in the wrap-up field to filter the results displayed.

**Note:** The Done button is not active until the wrap-up code is selected.

*Result:* The details of the interaction are populated on the task record page, if configured by administrators.

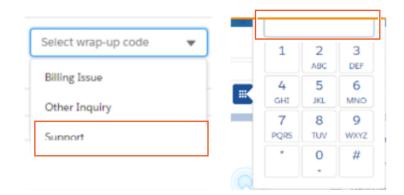
# 8 Troubleshooting

### 8.1 OneView controls not visible

OneView controls are only visible to users with the appropriate Salesforce permissions. Contact your OneView administrator to have the permissions assigned.

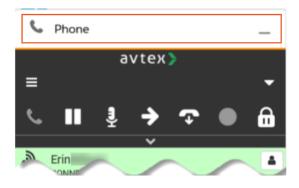
## 8.2 OneView controls cut off

Depending on the amount of content configured on a Salesforce page, drop-down and/or pop-up items such as the directory search, wrap-up code list, or the keypad may be cutoff or appear underneath other Lightning app items. Refer these issues to your Salesforce/OneView Administrator to adjust the Lightning page layout for the OneView controls.



### 8.3 Embedded phone does not minimize

The OneView CTI phone may not minimize after accepting an interaction if the mouse remains over the phone panel. After accepting an interaction, move the mouse away from the panel and the phone will minimize automatically. To minimize the phone manually, click the minimize icon or anywhere in the top bar.

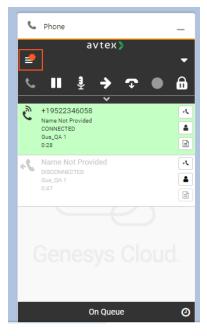


## 8.4 Schedule a callback button is gray

If the Schedule Callback button is always gray, you may not have the required Genesys Cloud permission for scheduling callbacks. See your administrator about getting the Conversation > Callback > Create permission.

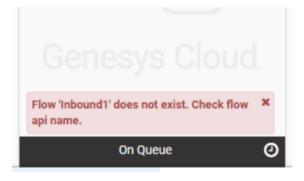
## 8.5 Interaction not displaying in tabs

Once an interaction is accepted, the task detail displays as a Salesforce tab. If a tab has been navigated away from, open the CTI panel and navigate to the Active Interactions list to select the desired interaction.



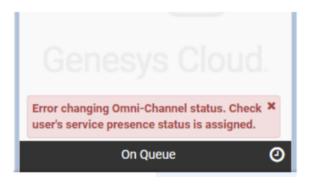
### 8.6 Salesforce flow errors

Report error notifications presented in the OneView phone indicating an issue with a flow to your OneView Administrator.



## 8.7 Omni-Channel Status Error

If an administrator configures an Omni-Channel state to sync with a service presence status that is not assigned to an agent, an error is presented. Contact your OneView administrator to have the service presence statuses reviewed.

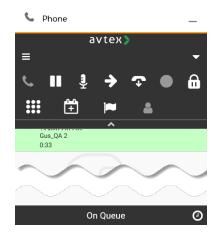


# 9 Appendix

## 9.1 CTI panel controls

The controls provided in the CTI panel of Salesforce correspond to Genesys Cloud features and capabilities.

For detailed information on Genesys Cloud call controls, see <u>https://help.my-purecloud.com/articles/call-controls/</u>.



## 9.2 Configure spellcheck

#### **Google Chrome**

To configure spellcheck for Chrome:

- 1. Open the Applications Menu and click **Settings**.
- 2. Scroll down to **Advanced**.
- 3. Under Languages, click Enhanced spell check.
- 4. Open the Applications Menu and click **Settings**.
- 5. Scroll down to **Advanced**.
- 6. Under Languages, expand Language.
- 7. Click Add languages.
- 8. Check the languages you want to add and click Add.
- 9. Refresh your page.

#### **Mozilla Firefox**

To configure spellcheck for Firefox:

- 1. Open the Applications Menu and click **Settings**.
- 2. Scroll down to Language and check Check your spelling as you type.
- 3. Refresh your page.
- 4. Open the Applications Menu and click **Settings**.
- 5. Scroll down to **Language**.
- 6. Click the drop-down menu beside English (United States) and click **Search for more languages**.
- 7. Click Select a language to add.
- 8. Click the languages you want to add and click **Add**.
- 9. Refresh your page.

# 10 Revision history

Date	Version	Description
September 4, 2024 4.8		Added <i>Microphone</i> updates to <i>Accept an interaction</i> section. <i>Response field size</i> details are updated in the <i>Respond to Chat</i> section. Added <i>Get Transcript</i> feature to the <i>Getting Started</i> section.
	4.8	Added Allow CTI Panel pop out feature details to Accept an Interaction section.
		Added Pop task and Save to the Notes section.
	Updated Outbound calls <i>On Behalf of Queue</i> and <i>Direct dial</i> timer from <i>Alerting</i> to <i>Dialing</i> .	
		Updated Consult transfer.
February 19, 2024	4.6	Updated Transfer a Voice interaction section.
January 31, 2024	4.5	Updated Accessing OneView section with Disable Alert Panel feature.
October 16, 2023 4.4		Added Displayed Interaction Details feature to the Get Started section.
	4.4	Updated Accessing OneView section with new screenshots.
		Updated Transfer a voice interaction section.
September 19, 2023	4.2	Updated Consult Transfer section.
April 20, 2023	3.16	Updated Reject or miss an interaction section.
December 13, 2022	3.14	Updated message interactions.
August 23, 2022	3.11	Genesys Cloud Agent status is displayed with the name.
April 29, 2022	3.8	Added support for outbound dialing campaigns.
March 3, 2022	3.6	Added support for callback interactions. Added single sign-on (SSO) integration support.
January 21, 2022	3.4	Updated to address Genesys Cloud <i>Communicate</i> license type. Added language support for French and German.
December 21, 2021	3.1	Added notation re: workspace tabs not transferring with consult transfers.
November 19, 2021	3.0	Added support for email interactions.
October 20, 2021	2.4	Updated ACW interface.
October 1, 2021	2.3	Added secure pause button to voice interactions.
September 14, 2021	2.2	Added support for message interactions.
July 26, 2021	2.0	Added support for chat interactions.
May 31, 2021	1.2	Updated call controls.
April 26, 2021	1.0	Creation of document.