OneView for Salesforce

Agent Guide

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CX Optimized

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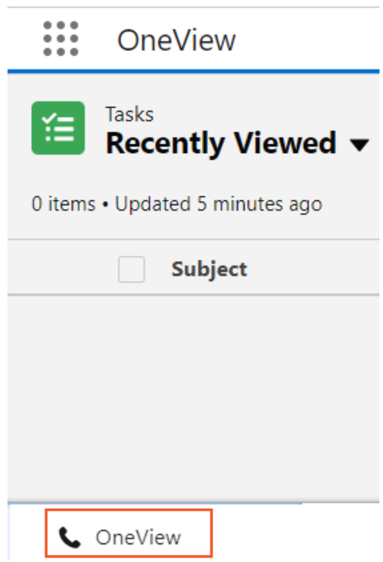
1 Getting started

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

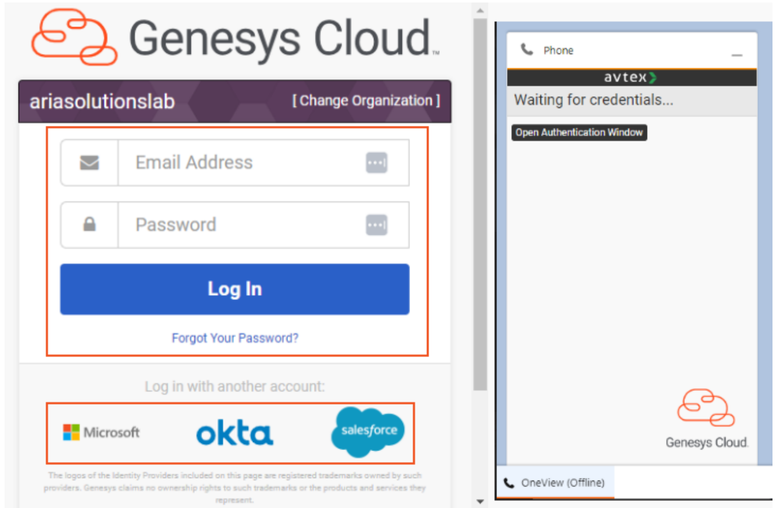
1.1 Accessing OneView

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 .



2. 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.



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 https://help.salesforce.com/s/articleView?id=000325737.

Notes:

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

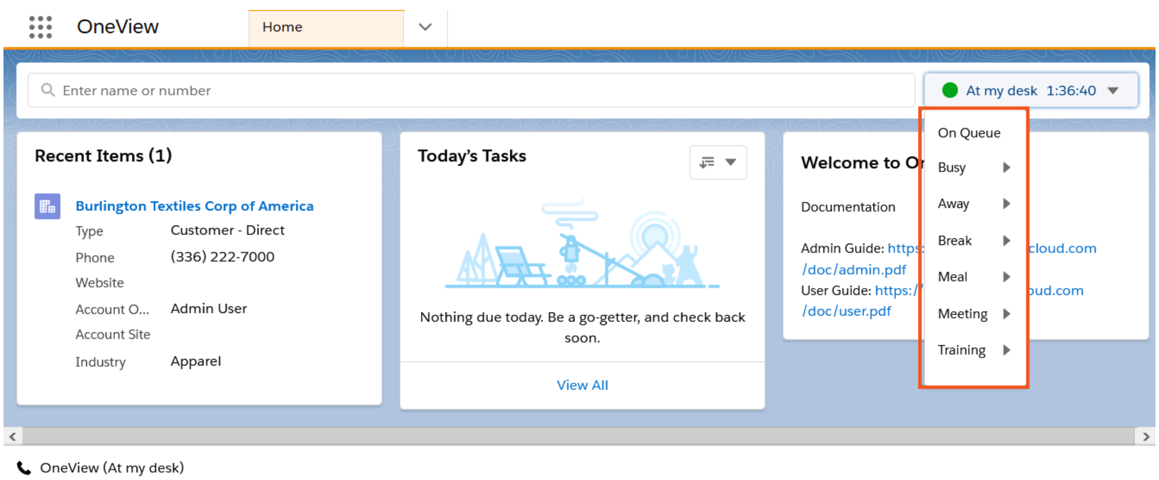
1.3 Agent status

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.

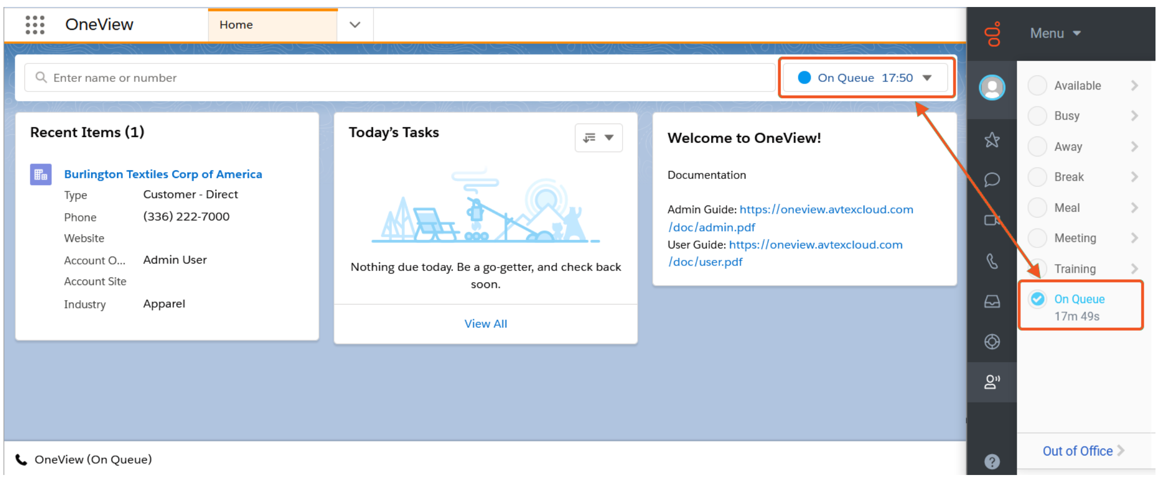
Changing state

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



State synchronization

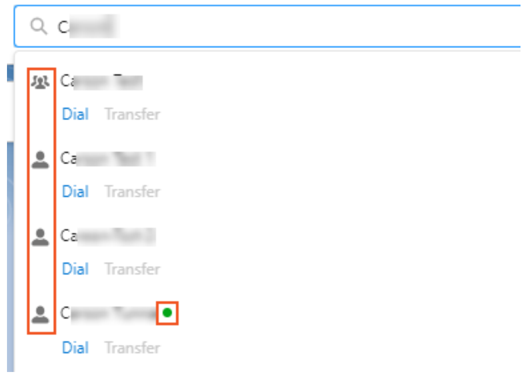
Changing the state in Salesforce changes the state in Genesys Cloud simultaneously, or vice versa.



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.

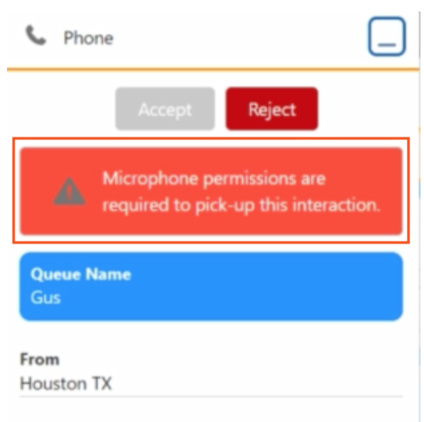


Directory contacts can be:

- 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.

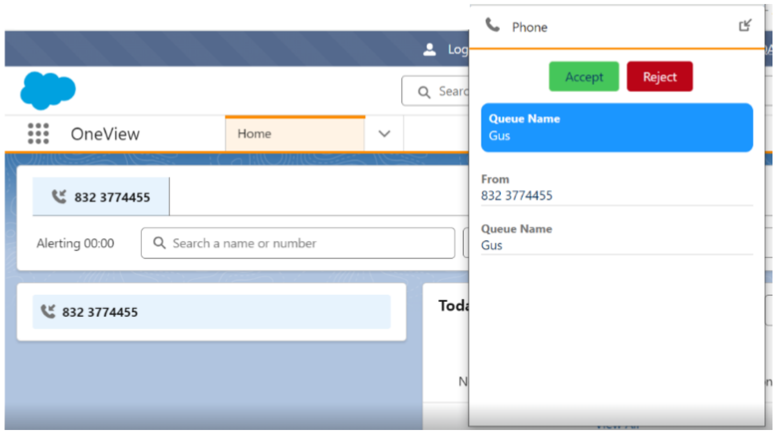
1.5 Accept an interaction

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.



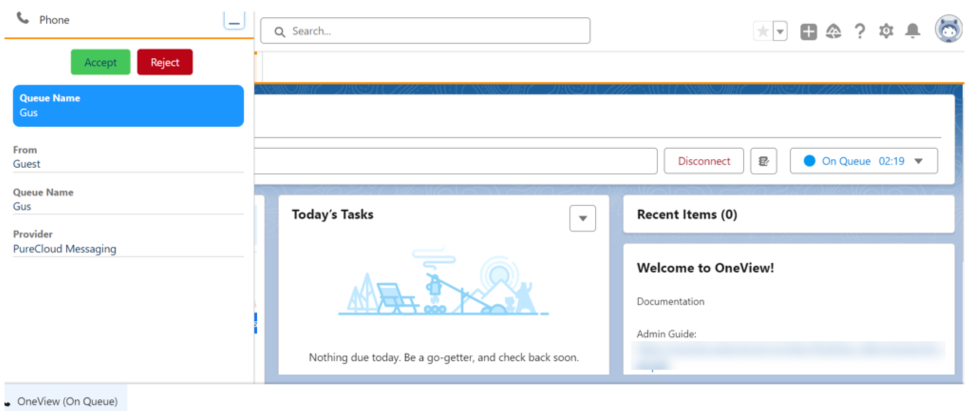
An incoming alert appears in the CTI phone, if the **Disable Alert Panel** in the OneView settings page is not enabled by the administrators; else, the incoming alert will utilize Genesys embedded framework interface.

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.

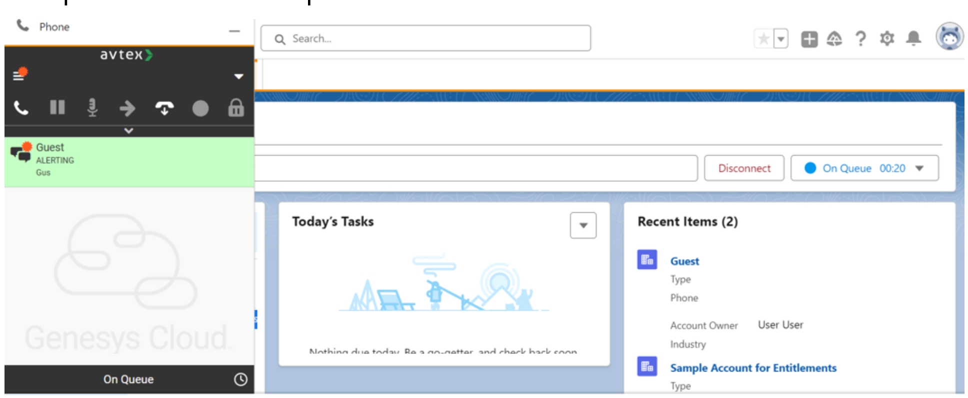


Disable Alert Panel

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



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

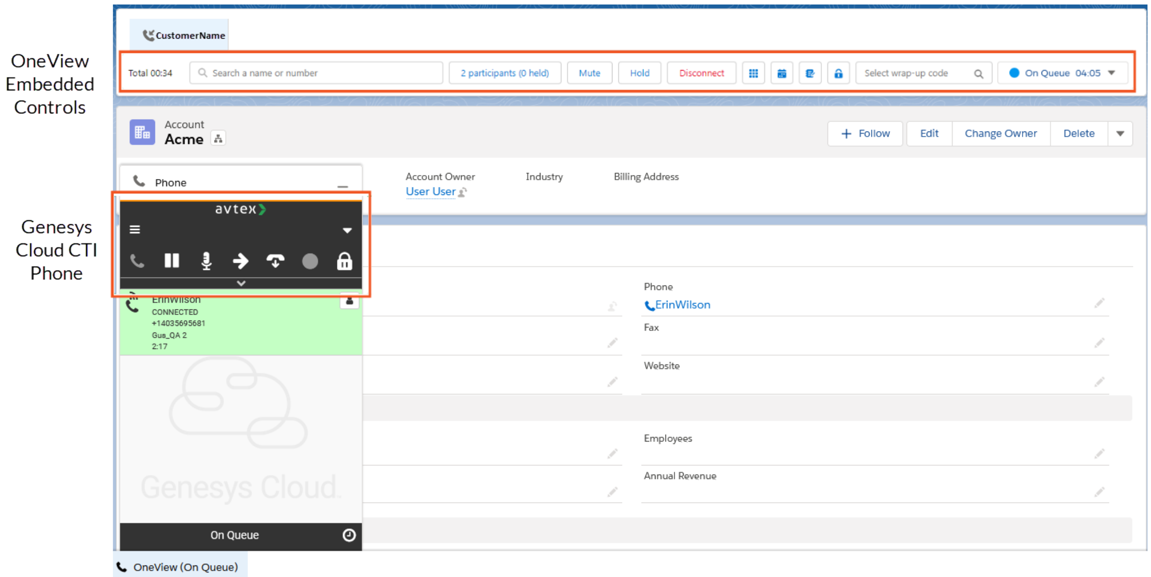


All interactions arrive in the same way; the interaction type, queue name, and customer contact is visible.

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.

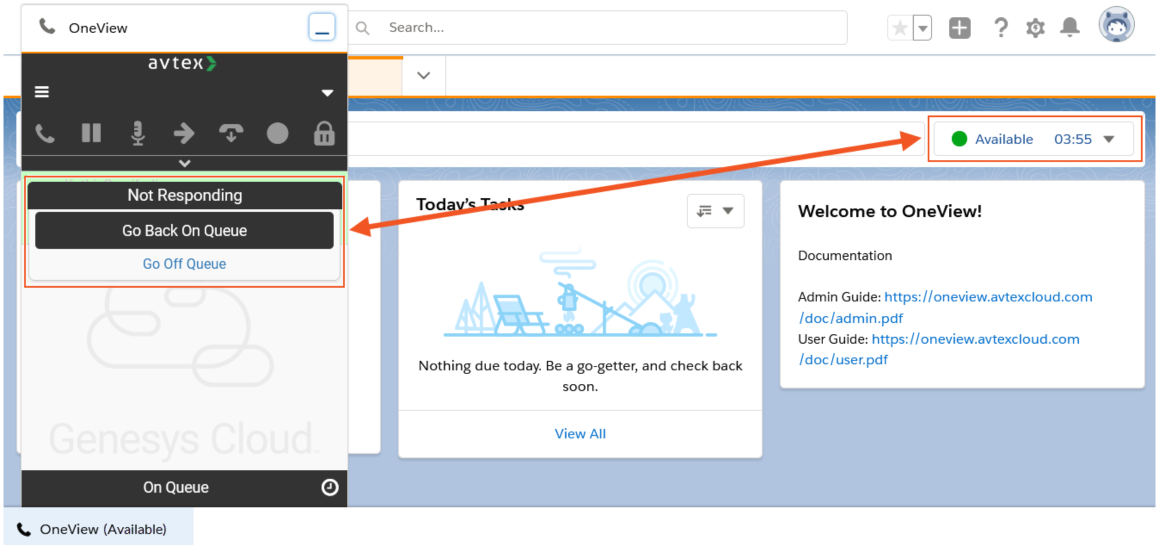


Note: Interaction controls are also available in the Genesys Cloud CTI phone. These duplicate the OneView controls; however, using some functions results in being directed to Genesys Cloud in a separate browser window thereby no longer using OneView within Salesforce. For information on the Genesys Cloud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

1.6 Reject or miss an interaction

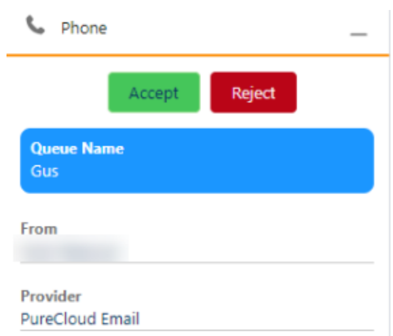
If an interaction is rejected or unanswered, it is returned to the queue. OneView changes the agent state to Not Responding and provides options for how to proceed – Go Back on Queue or Go Off Queue. The alerting timeout length is configured in Genesys Cloud. When users reject or miss a call, the CTI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

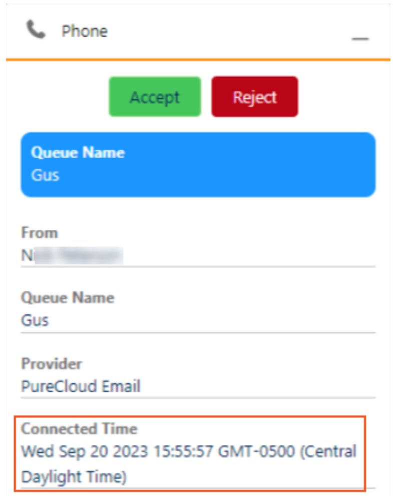


1.7 Displayed Interaction Details

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.

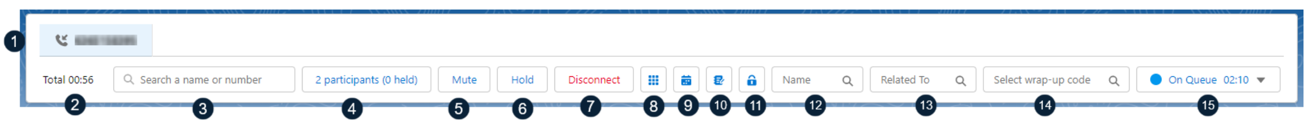


When a transfer happens, the **Queue Name** field changes to **Transferred From Queue(s)**. It displays the queue name(s) it is been transferred from.

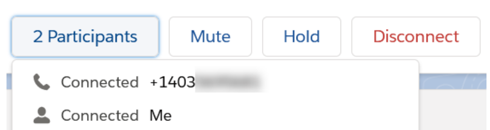
Notes:

- 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.

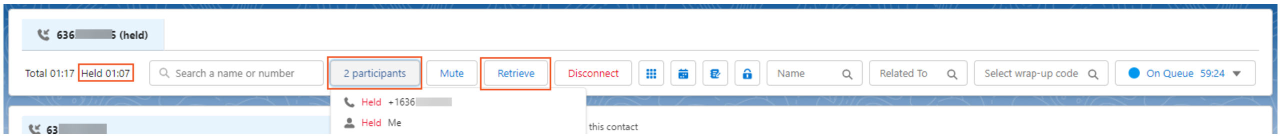
1.8 OneView voice controls



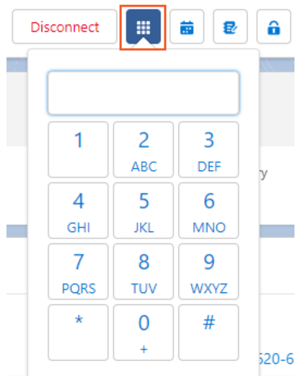
1. **Customer caller ID:** May show customer name, phone number, or system generated ID.
2. **Interaction timer:** Displays the time accrued for the interaction since connecting.
3. **Directory:** Search for a contact within the Genesys Cloud org. See *Directory*.
4. **Participant list:** Click to see 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.



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.



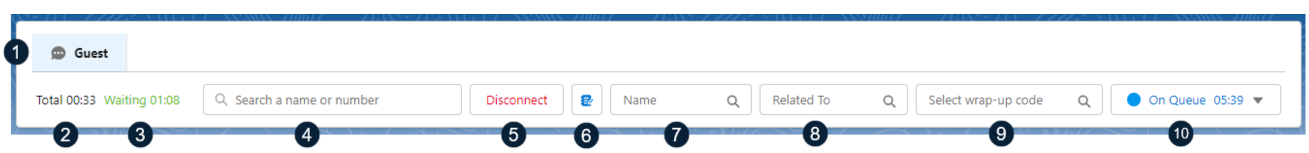
7. **Disconnect:** Ends the call. See *After call work / wrap up*.
8. **Keypad:** Provides entry of DTMF commands on a call and toggles open and closed.



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

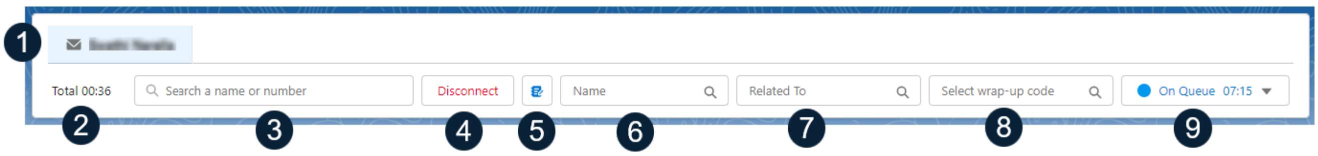


1. **Customer name:** Customer name as entered by the customer in their message.
2. **Interaction timer:** Displays the time accrued for the interaction since connecting.
3. **Chat state timer:** Displays the time since the last response.
   - Waiting: Time agent has been waiting for a customer response.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



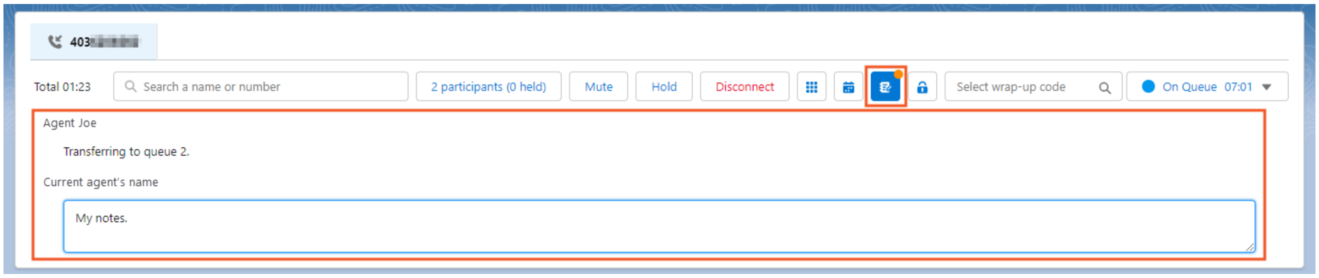
1. **Customer ID:** May show customer name or email address.
2. **Interaction Timer:** Displays the time accrued for the interaction since connecting.
3. **Directory:** Search for a contact within the Genesys Cloud org. See *Directory*.
4. **Disconnect:** Ends the interaction.
5. **Notes:** Allow the 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**.

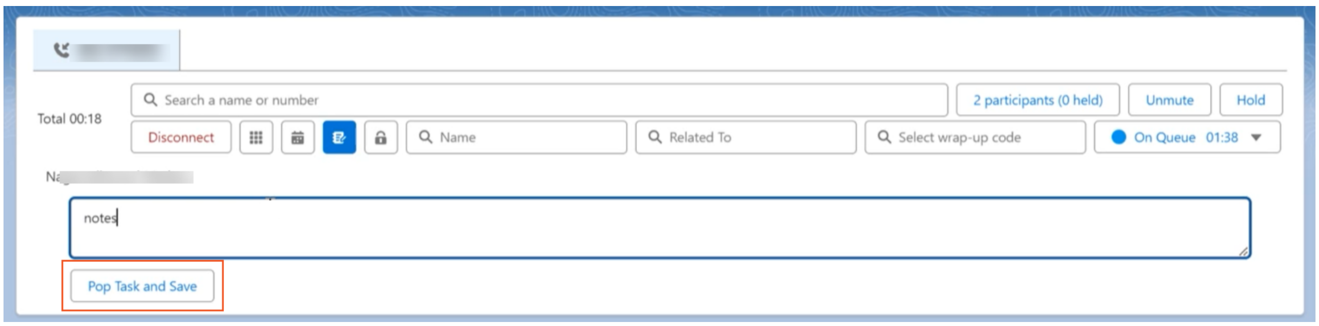
When receiving a transferred interaction, the icon has an orange indicator.



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:

1.12 Get Transcript

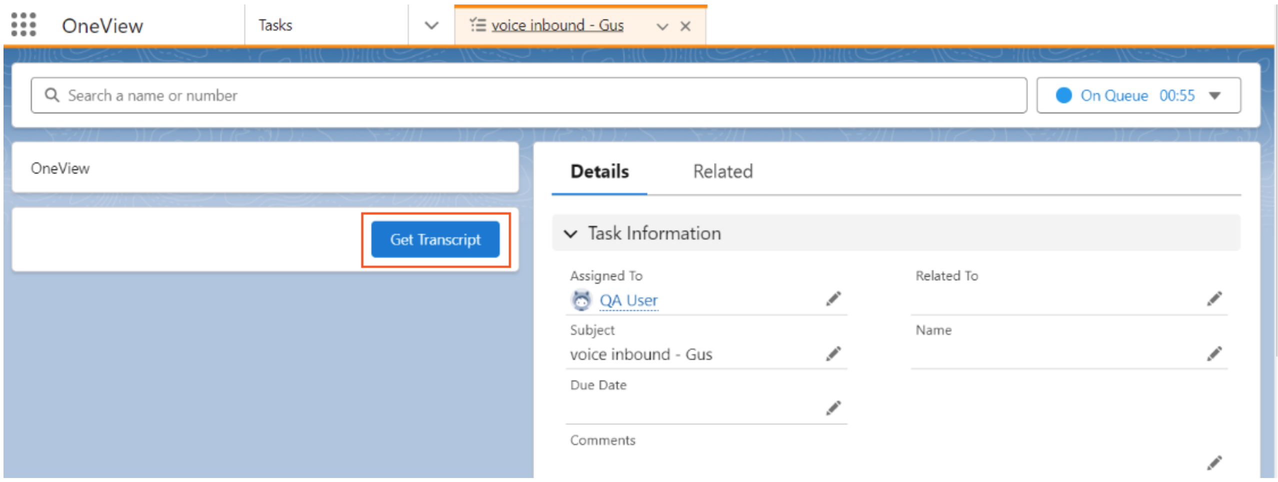
The Get Transcripts feature is available for chat and inbound calls only when task logging is enabled by admins in the OneView settings page. This feature can be accessed within the tasks related to interactions, allowing you to retrieve and review transcripts as needed.

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**.

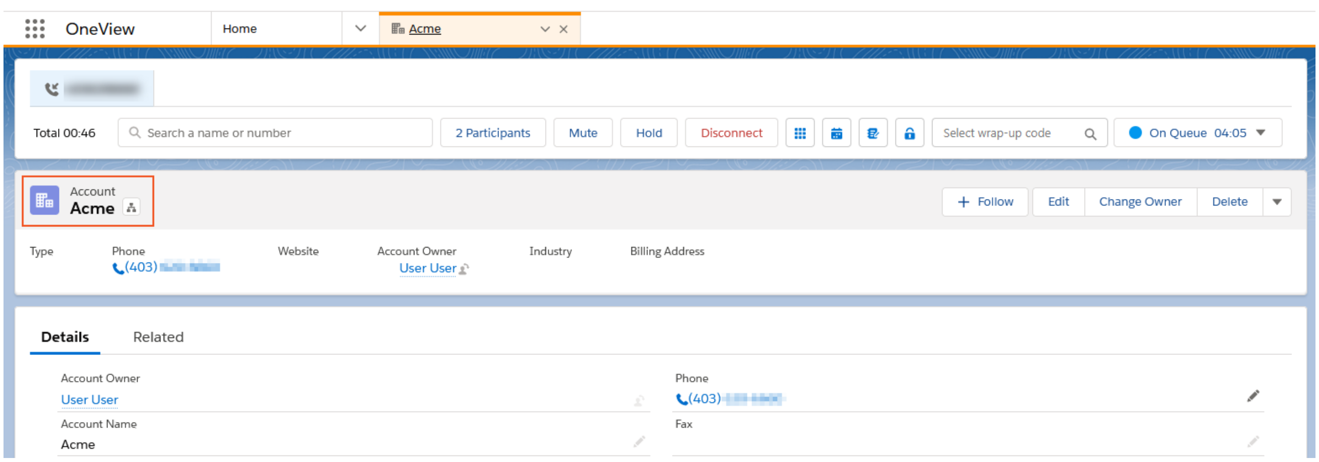


1.13 Screen pops

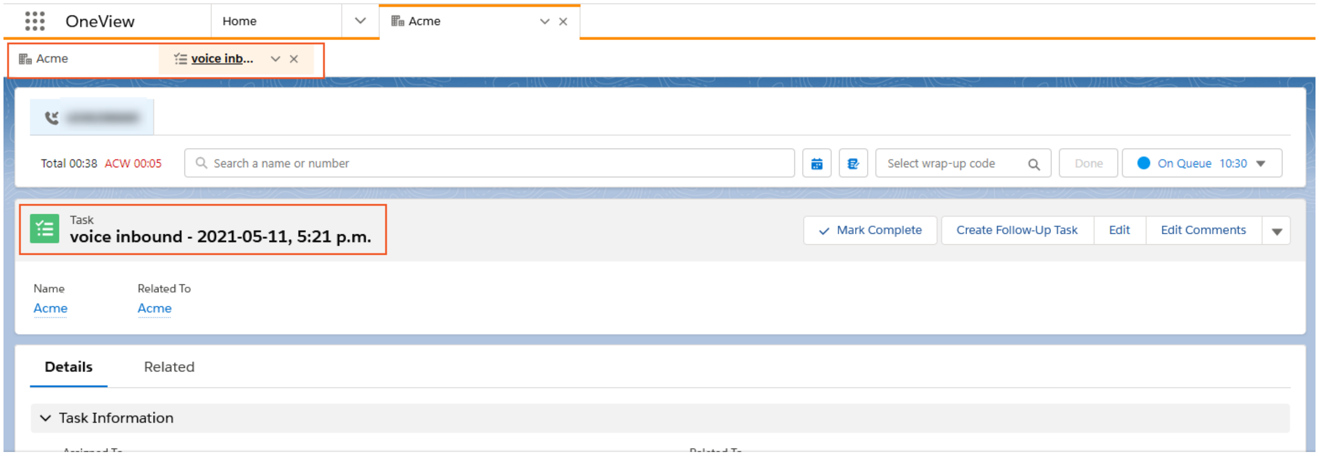
Depending on how Genesys Cloud and Salesforce have been configured by administrators, Accounts, Tasks, Cases, Leads, and/or unique URLs may be automatically generated for the agent as primary tabs or sub tabs.

Examples:

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



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


OneView
Home
Acme
Acme
voice inb...
Total 00:38 ACW 00:05
Search a name or number
Select wrap-up code
Done
On Queue 10:30
Task
voice inbound - 2021-05-11, 5:21 p.m.
Mark Complete
Create Follow-Up Task
Edit
Edit Comments
Name
Acme
Related To
Acme
Details
Related
Task Information

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. • Agent has the ability to toggle it off prior to transferring an interaction. When completing transfer, no tabs will transfer to the receiving agent.	• 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. • Agent has the ability to toggle it off prior to transferring an interaction. When completing transfer, no tabs will transfer to the receiving agent.
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.

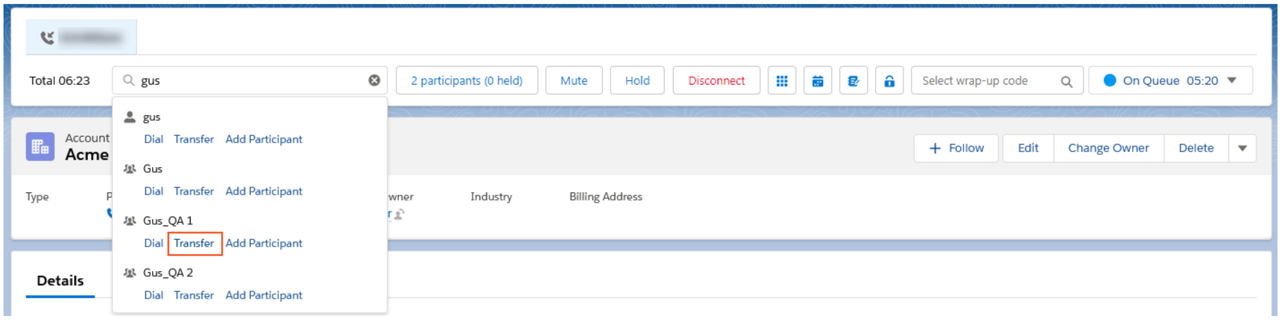
Transfer notes

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

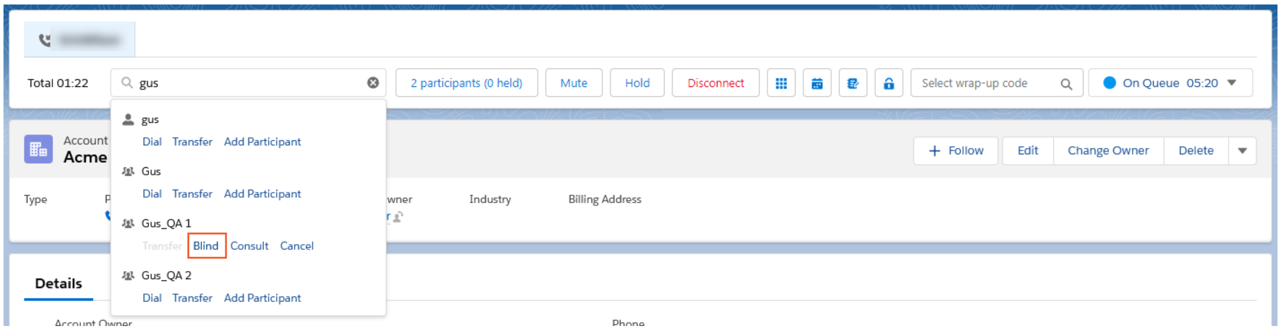
2.1.1 Blind transfer

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.



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



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

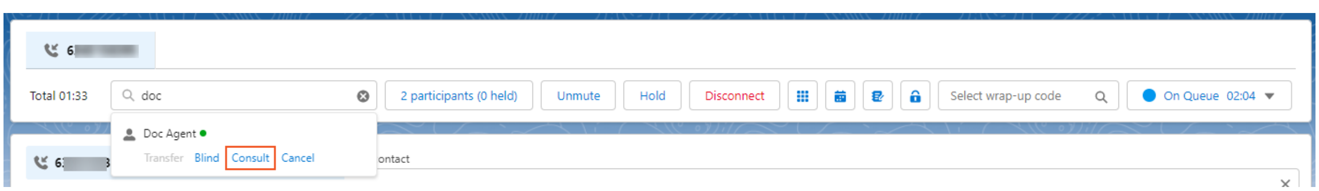
3. Proceed to *After call work / wrap up*.

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**.

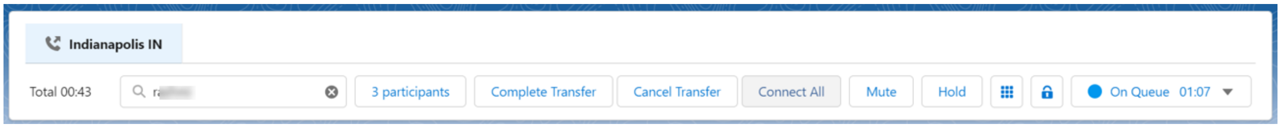
   Note: Disconnect button is not available when a consult transfer is performed.

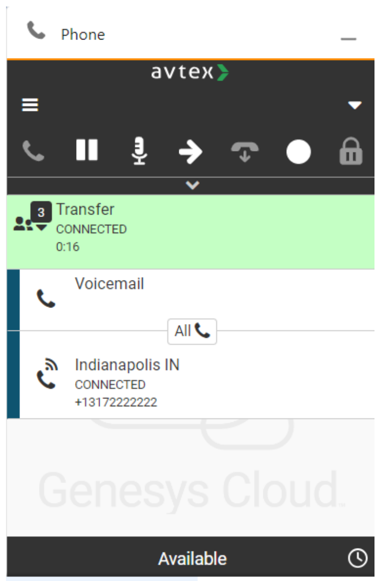


Result: A transfer interaction appears in the CTI panel and options to Connect All, Complete Transfer or Cancel Transfer are available.

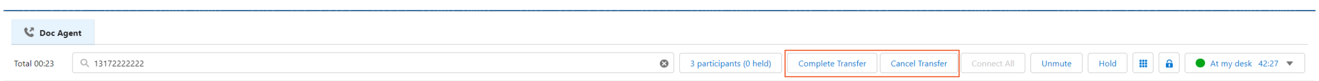
Note: The recipient receives only the focused tab along with the call as it is transferred.

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.





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.



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*.

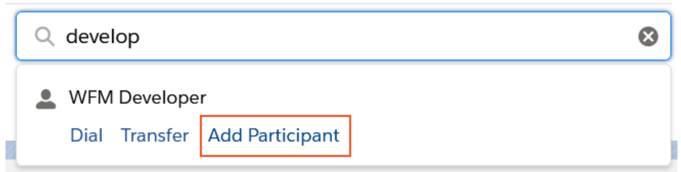
2.2 Conference / merge a voice interaction

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**.



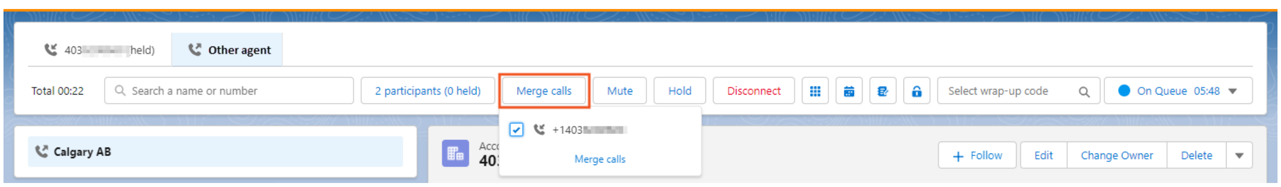
Note: If the existing caller is on hold, they are retrieved when Add Participant is clicked. If the agent would like the existing caller to remain on hold while the second call is made, click Dial instead and follow the Merge calls process to control when the new participant is added into the call.

2.2.2 Merge calls

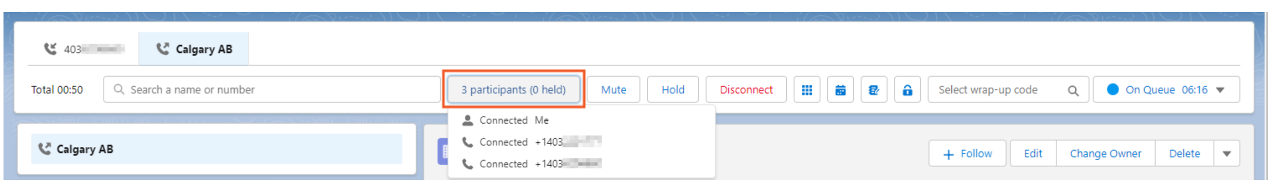
Brings together multiple calls in a conference call. An agent may have answered another incoming call or dialed another party they wish to conference together.

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**.



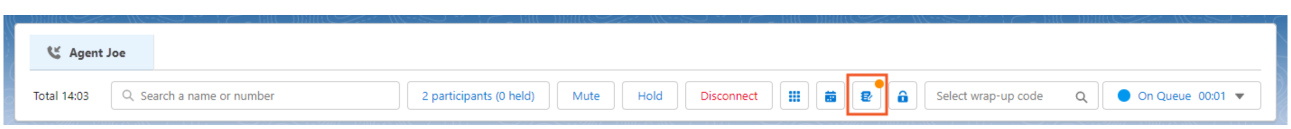
Result: All parties are brought together.



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.



- 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.

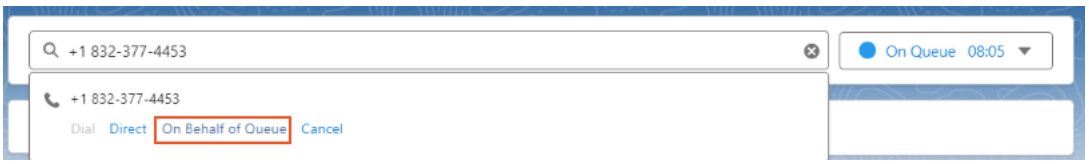
2.4 Make an outbound voice call

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

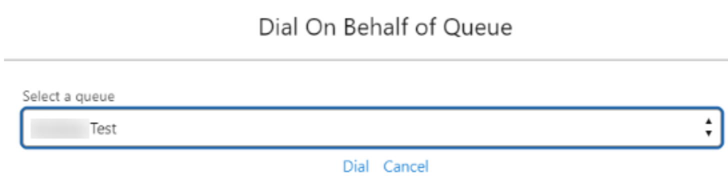
Note: The "On behalf of a queue" option is not available to Genesys Cloud *Communicate* users.

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**.

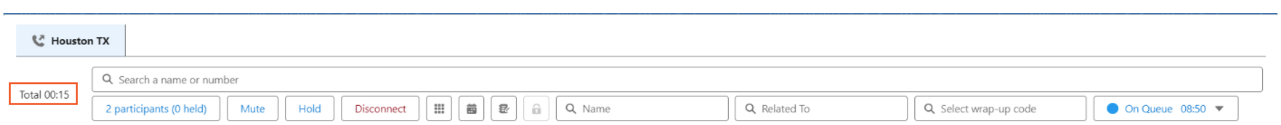


3. In the window, select the queue to dial from and click **Dial**.



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

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

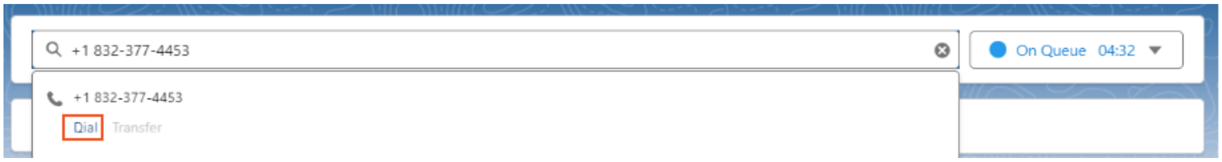


Note: As this call is made on behalf of a queue, the agent is put into After Call Work when the call is disconnected. See *After call work / wrap up*.

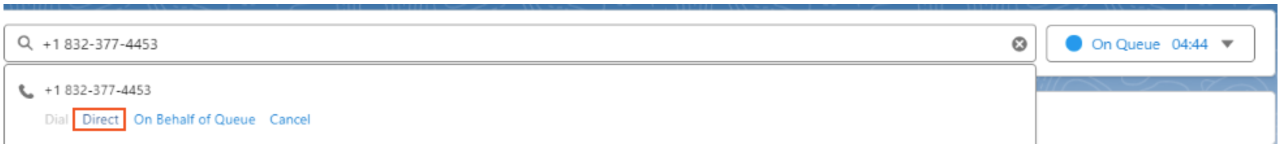
2.4.2 Direct dial

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

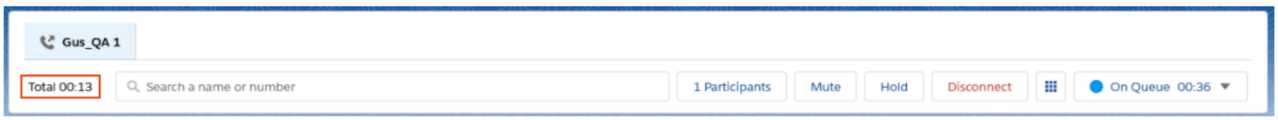
   Note: If the agent already has an active call, the Transfer and Add Participant options are also available.



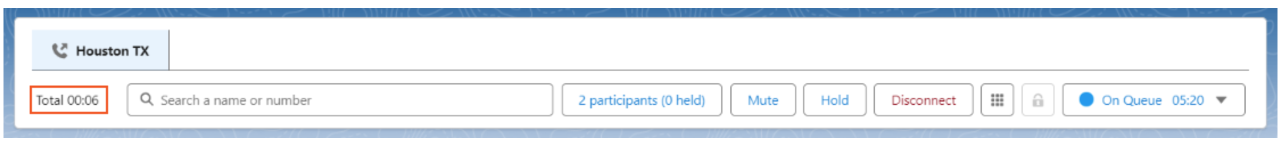
2. Click **Direct**.



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



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

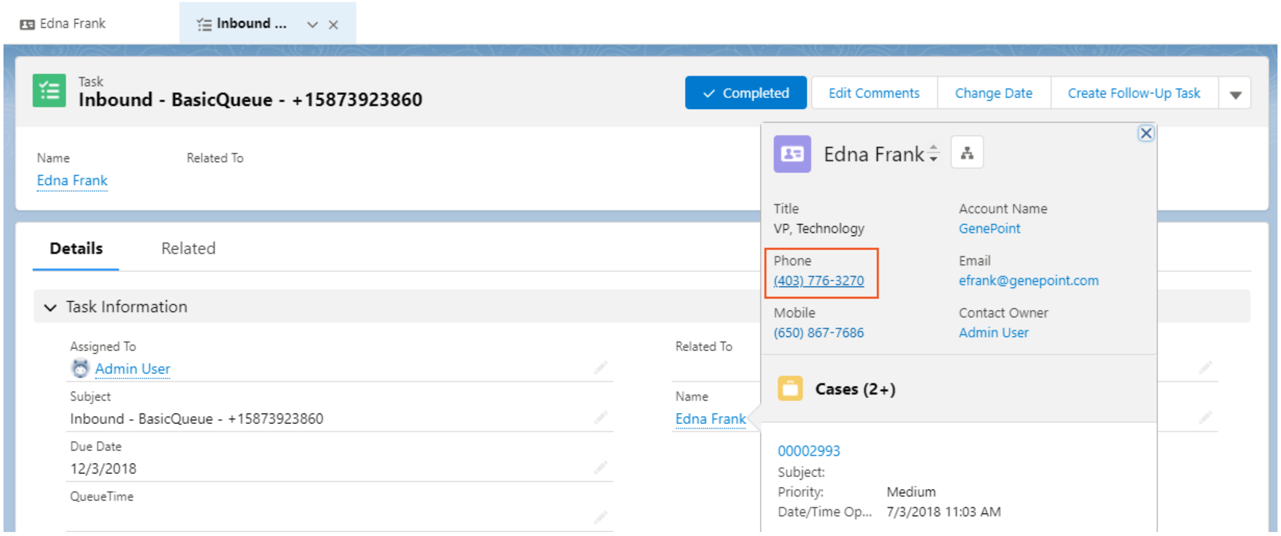


Note: As a direct call is not attributed to a queue, the agent is not put into after call work when the call is complete.

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.

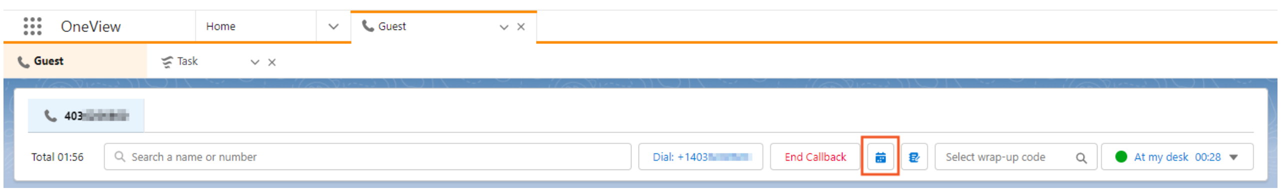


Note: If the Genesys Cloud setting "*Prompt for queue on click-to-dial*" is enabled, the CTI phone frame requests the queue selection before proceeding with the call. For more information, see https://help.mypurecloud.com/articles/configure-click-to-dial/.

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.

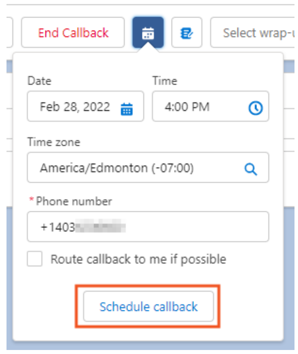


Note: If the Schedule Callback button is unavailable (gray):

- 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

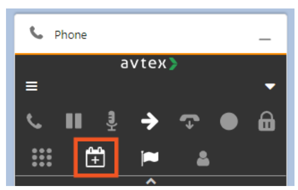
- **Phone number**: If the contact wants the callback to a different number, enter the number the contact prefers.
- **Route callback to me if possible**: Select to route the callback to yourself. If you are not available, or this is not selected, the callback is directed to the next available agent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



3. Click **Schedule callback**.

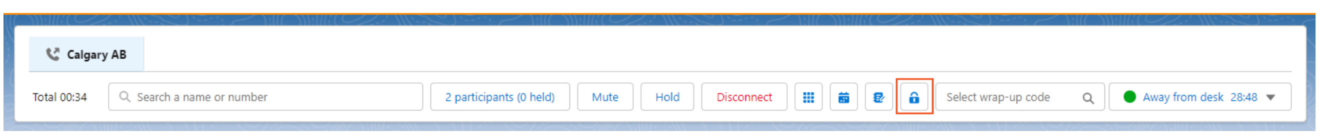
   Result: The Schedule Callback icon turns gray.

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.

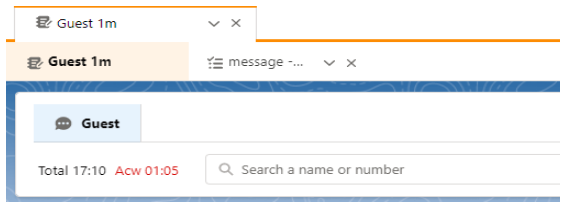


2.7 After call work / wrap up

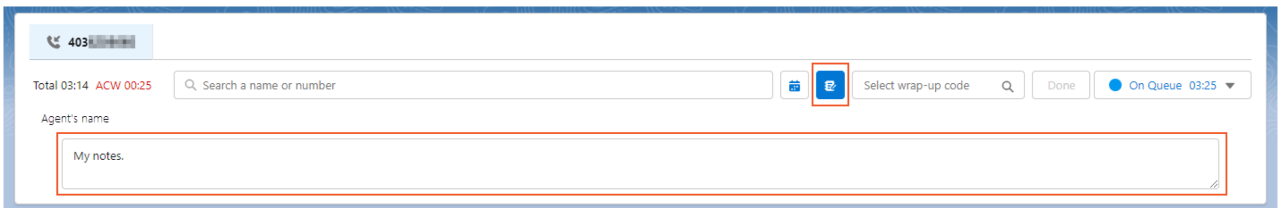
After a queue-related interaction is disconnected, the widget displays the ACW time. Depending on Genesys Cloud configuration, the timer may show elapsed time or the countdown timer. The wrap-up codes presented are based on Genesys Cloud configuration.

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.

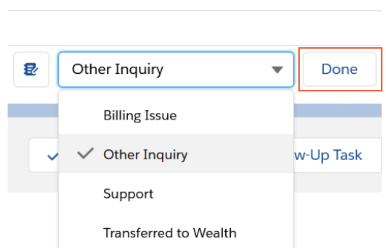
When the wrap-up is complete, the notes icon displays as it did originally, and the timer disappears.



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.

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

3 Callback interactions

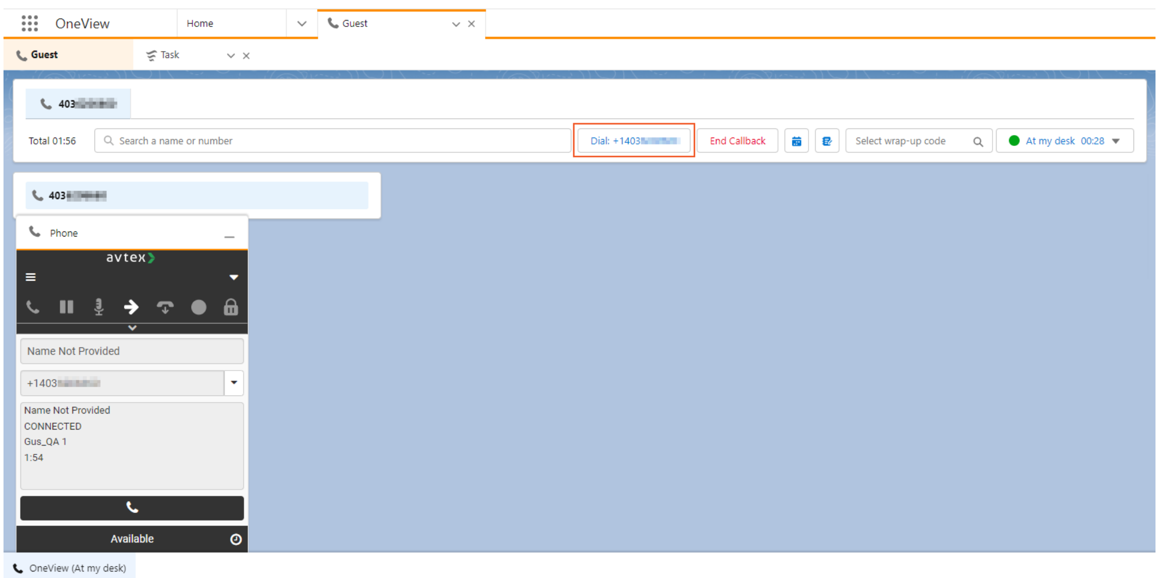
3.1 Respond to a callback interaction

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:

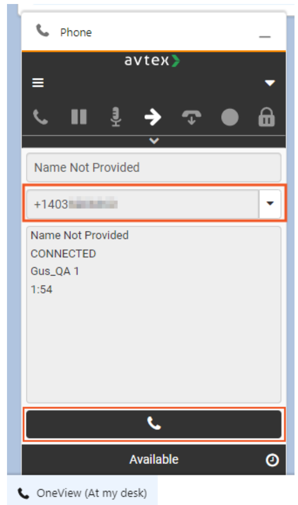
1. Click the displayed phone number button to dial the number. If required, select the appropriate number from the drop-down list of numbers.

   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**.

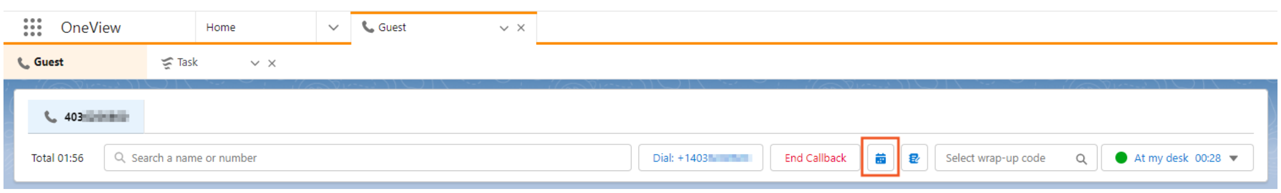
Note: Callbacks can also be initiated from the CTI panel. See https://help.mypurecloud.com/articles/place-transfer-dismiss-callback/.



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.

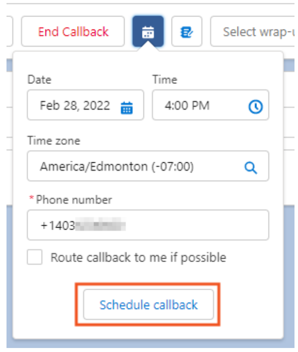


Note: If the Schedule Callback button is unavailable (gray):

- 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:

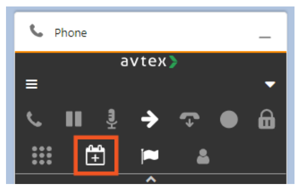
- **Date**: type or select the date. **Note:** A callback cannot be scheduled for more than 30 days in advance.
- **Time**: type or select the time
- **Time zone**: select the time zone of the contact
- **Phone number**: If the contact wants the callback to a different number, enter the number the contact 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.



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

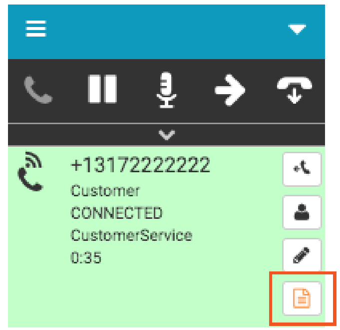
To dismiss a callback without calling the customer or transferring the interaction, click **End Callback**.

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.

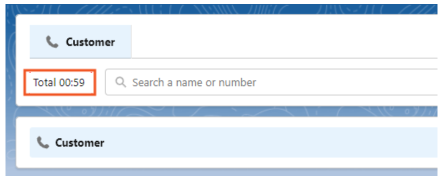
4.2 Place a call for a preview campaign

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:

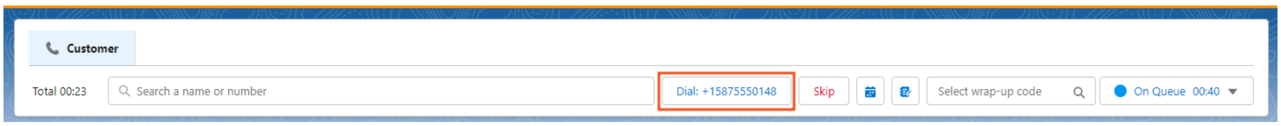
- *Schedule a callback* for another time.
- *Blind transfer* to another queue or agent.
- If administrators have allowed skipping of preview calls, the Skip button will be available. If it's determined the outbound call is not required, click **Skip**. The interaction is considered closed and not put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



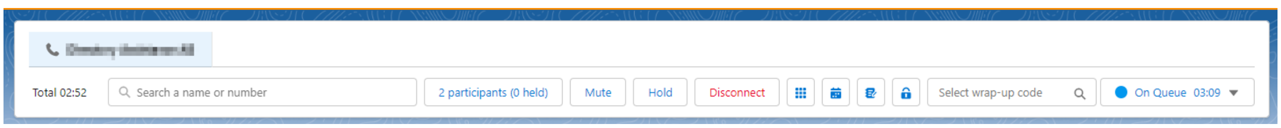
To proceed with making the outbound call to the contact:

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.



   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**.

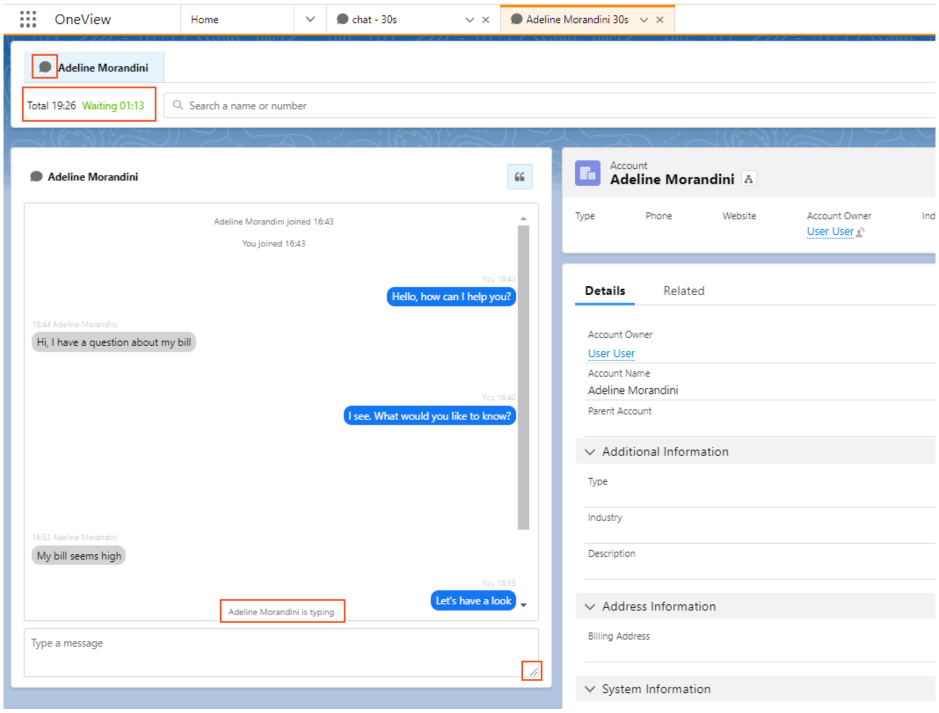
   Result: The after call work timer starts.

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



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*.

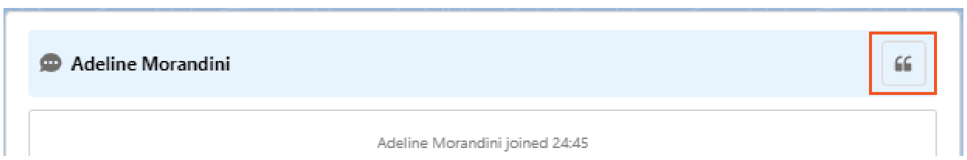
5.1.2 Canned responses

Canned responses configured in Genesys Cloud are used in OneView.

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

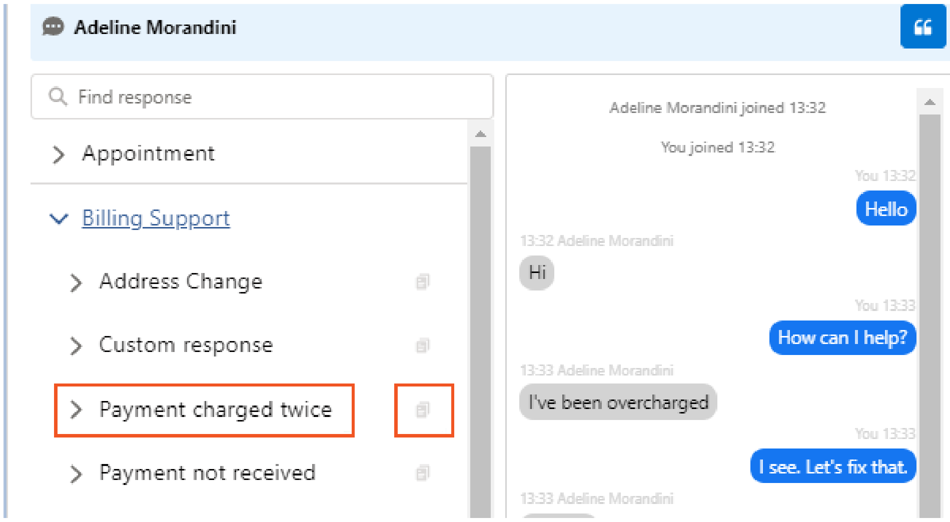
Note: Not available for Genesys Cloud *Communicate* users.

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.

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 https://help.mypurecloud.com/articles/use-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:

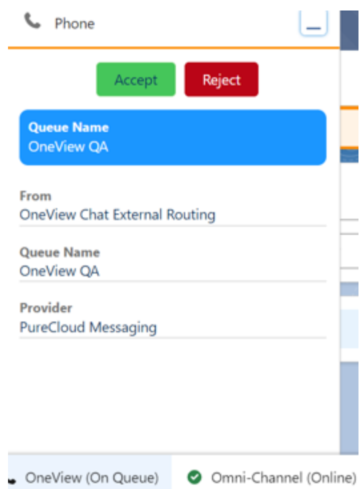
- Notes added to the interaction by a previous agent are indicated to the receiving agent. Click the Notes icon to view.
- Wrap-up codes presented correspond to the original queue the interaction entered. If the receiving agent is not a member of that queue, default wrap-up codes are presented.
- When 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

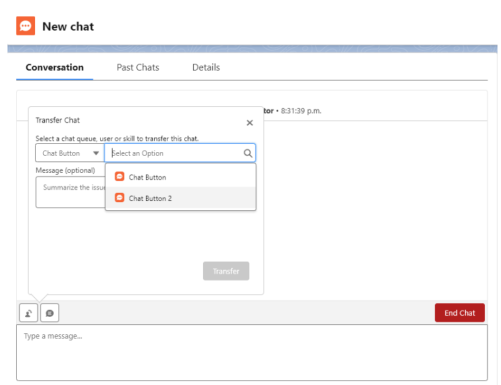
A Blind transfer can be initiated via chat external routing.

To transfer:

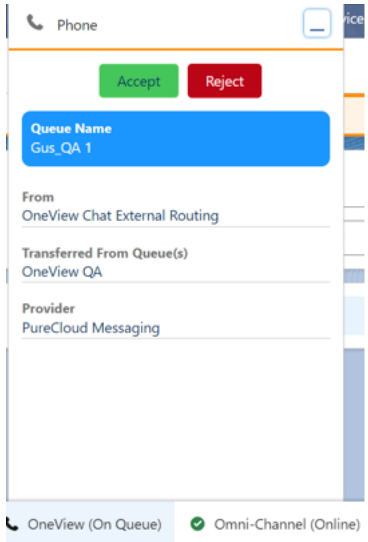
1. Set the Omni-Channel status to Online.
2. Initiate a Salesforce chat interaction.
3. Agent 1 accepts a Salesforce chat routed through OneView Chat External Routing.



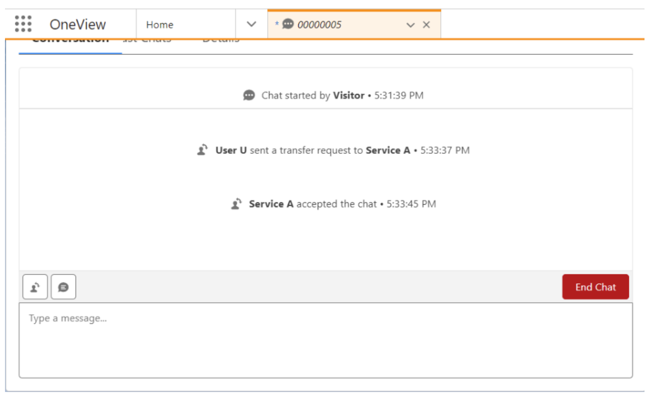
4. Agent 1 transfers chat to another queue (chat button).



5. Agent 2 receives transfer through Genesys Cloud.



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



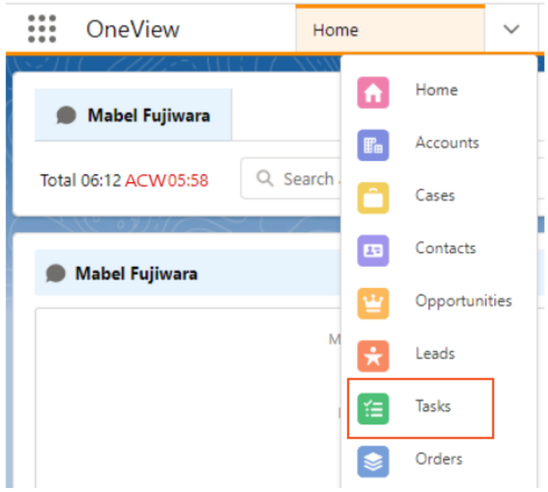
7. Click the **End Chat** button to disconnect.

5.5 View a past chat conversation

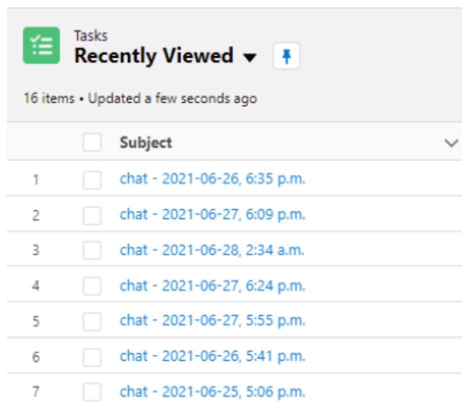
Note: Not available for Genesys Cloud *Communicate* users.

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

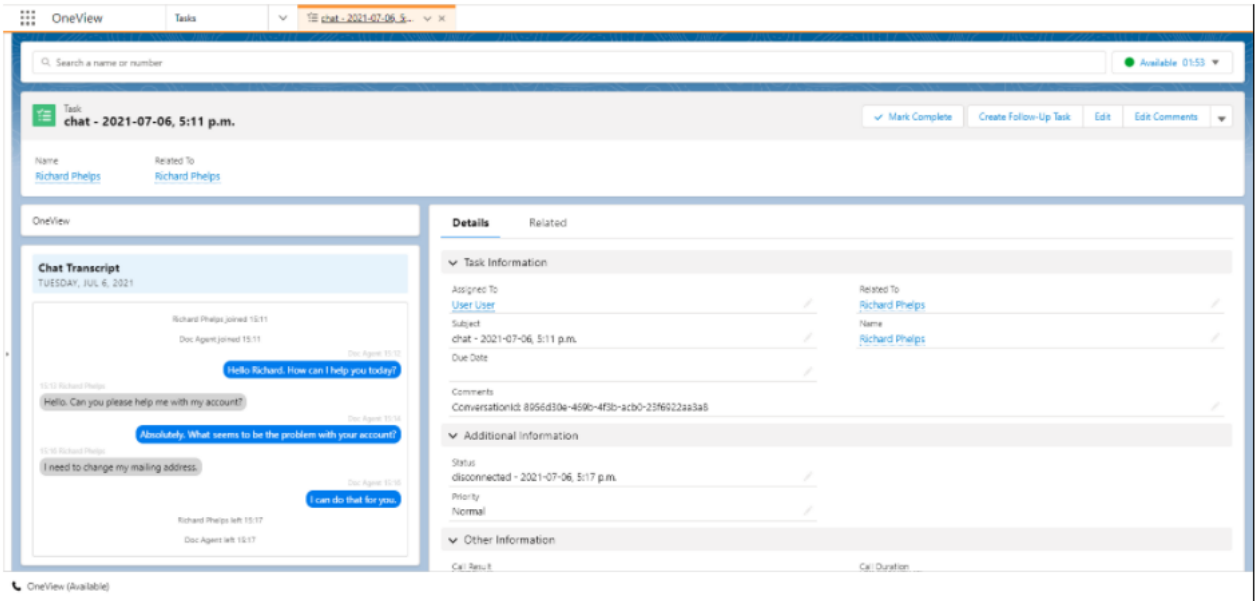
1. Click the drop-down menu beside **Home** and click **Tasks**.



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



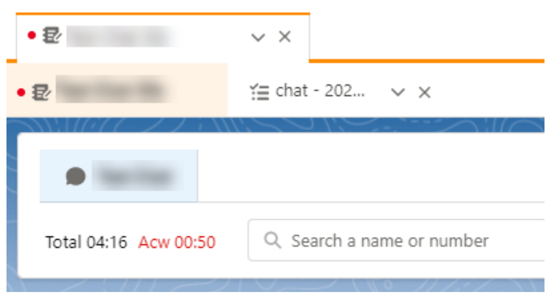
3. The details of the task and the chat transcript component are displayed.



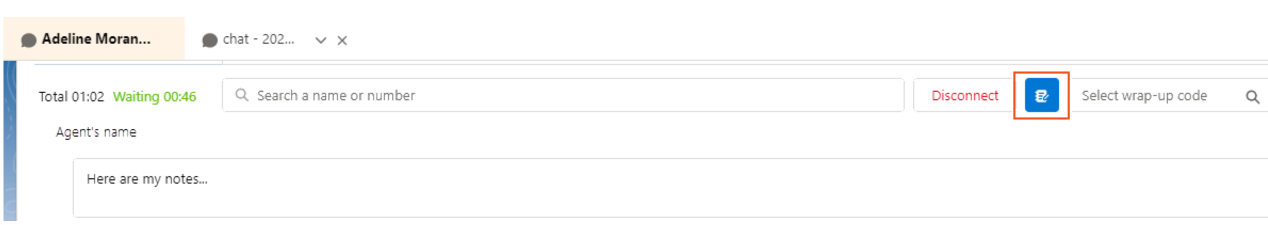
5.6 After chat work / wrap up

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.

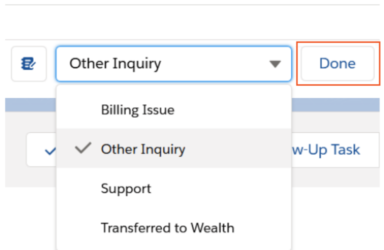
For contextual tabs, a red dot and a notes icon display in the primary tab.



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.

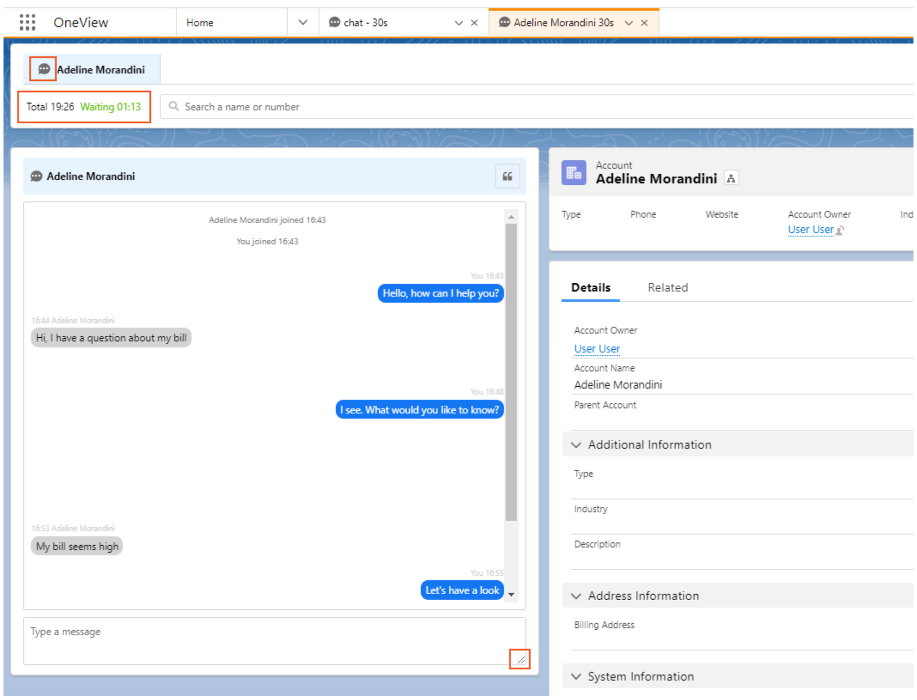
6 Message interactions

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



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

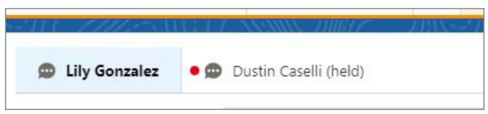
The interaction and state timers are located at the top left of the screen.

- 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*.

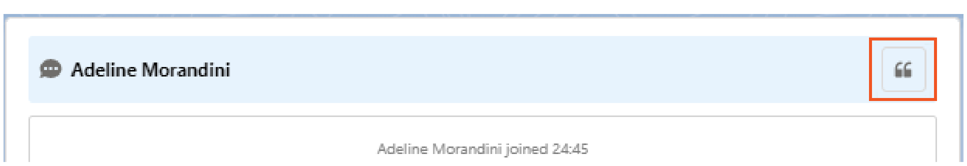
6.1.2 Canned responses

Canned responses configured in Genesys Cloud are used in OneView.

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

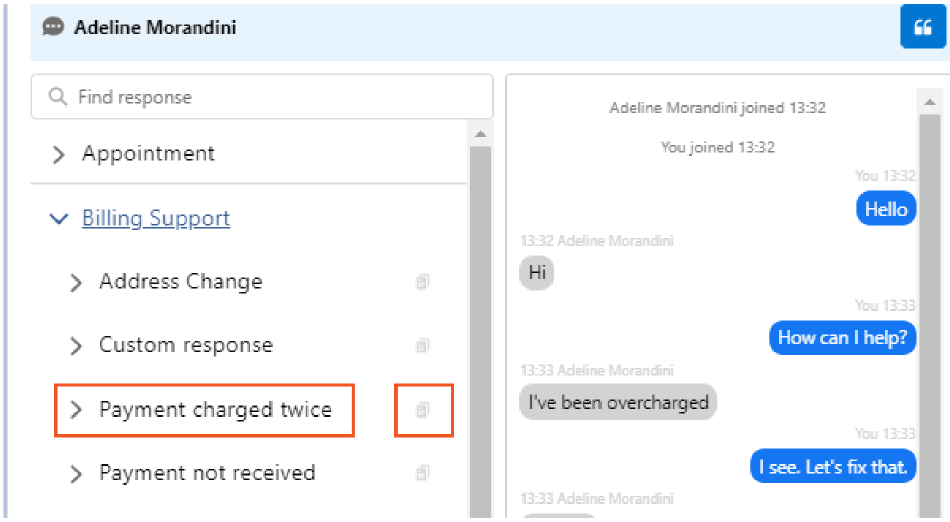
Note: Not available for Genesys Cloud *Communicate* users.

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.

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

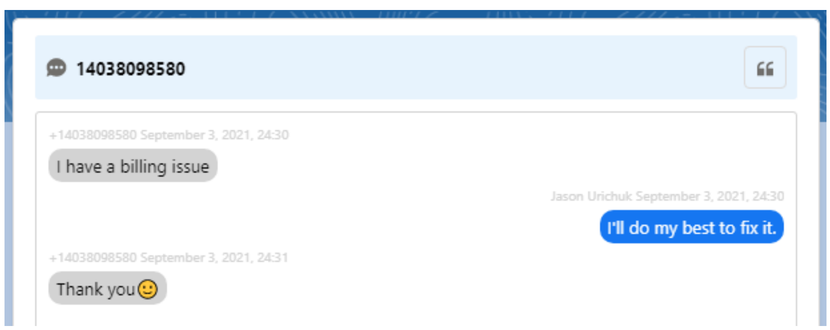


4. To close the list of canned responses, click the Canned Responses icon again.

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

6.1.3 View emojis

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



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

6.1.4 View images and stickers

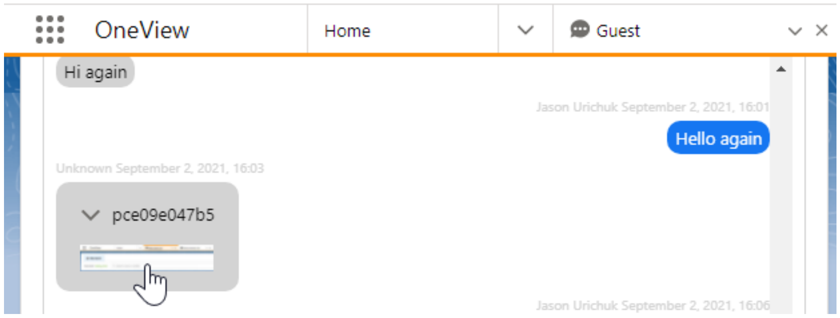
Customers may send stickers and images (e.g., screen captures) to the agent. The file types currently supported are .jpg, .png, and .gif.

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.

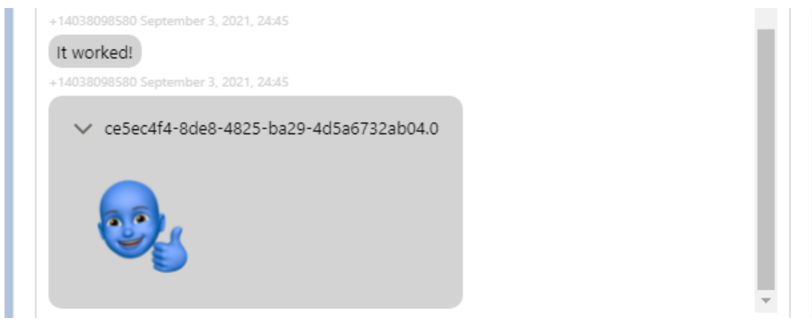


Result: The image will download.

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

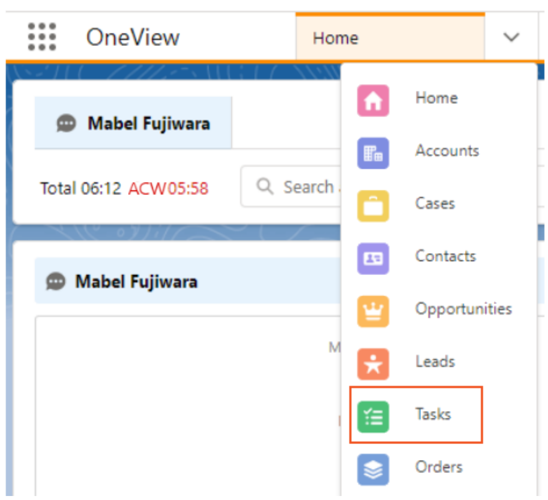
A message transferred from another agent presents in the same way as a regular message interaction. Additional details:

- 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.

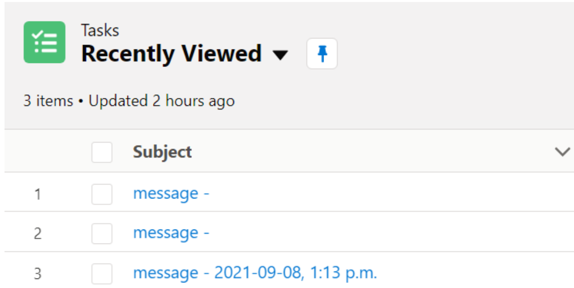
6.4 View a past message conversation

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.

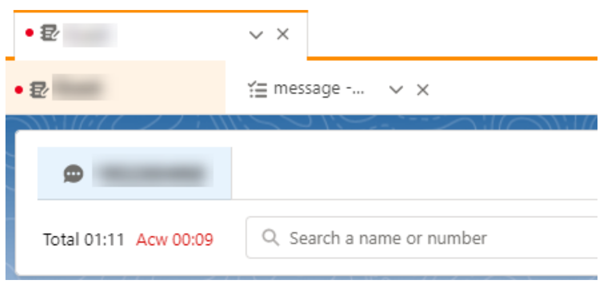


Result: The details of the task and the message transcript component are displayed. Emojis and stickers sent by the customer will also be included in the transcript.

6.5 After message work / wrap up

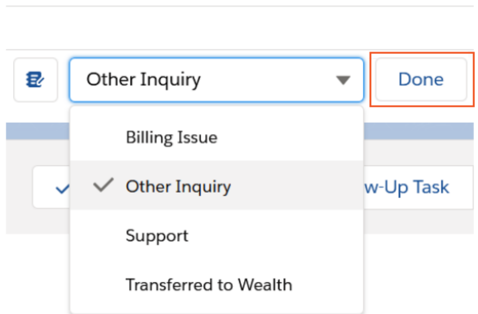
After a queue-related interaction is disconnected, the widget displays the ACW time. Depending on Genesys Cloud configuration, the timer may show elapsed time or the countdown timer. The wrap-up codes presented are based on Genesys Cloud configuration.

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.

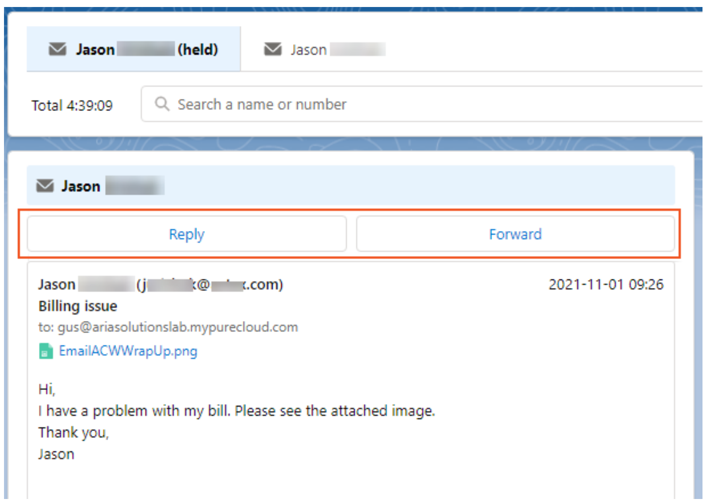
Result: The details of the interaction are populated on the task record page, if configured by administrators.

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:

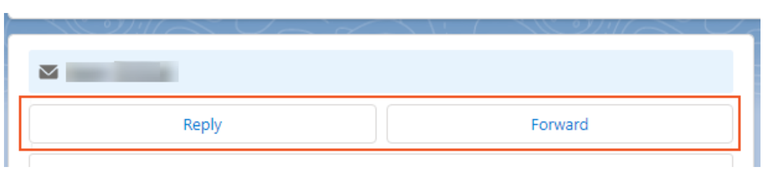
- the email subject
- the email text
- if there are attachments
- the email sender



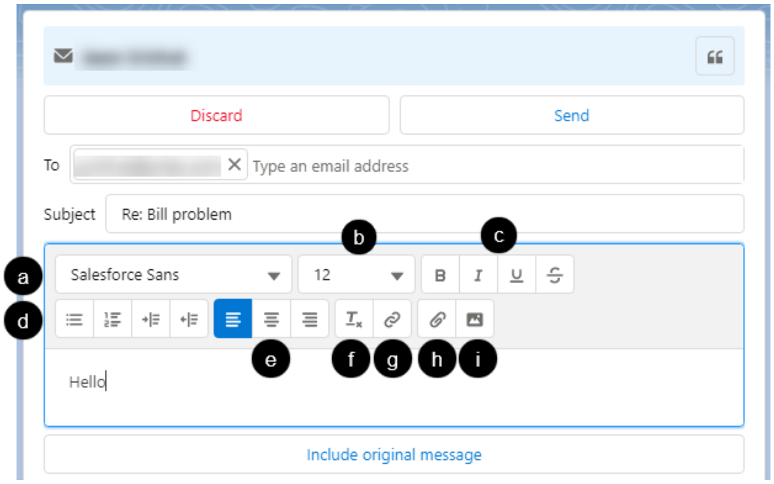
7.2 Reply to or forward an email

To reply to or forward an email:

Click **Reply** or **Forward**.



A draft email is created.



1. 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*.

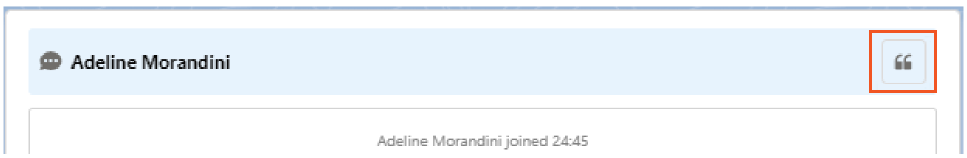
7.2.2 Canned responses

Canned responses configured in Genesys Cloud are used in OneView.

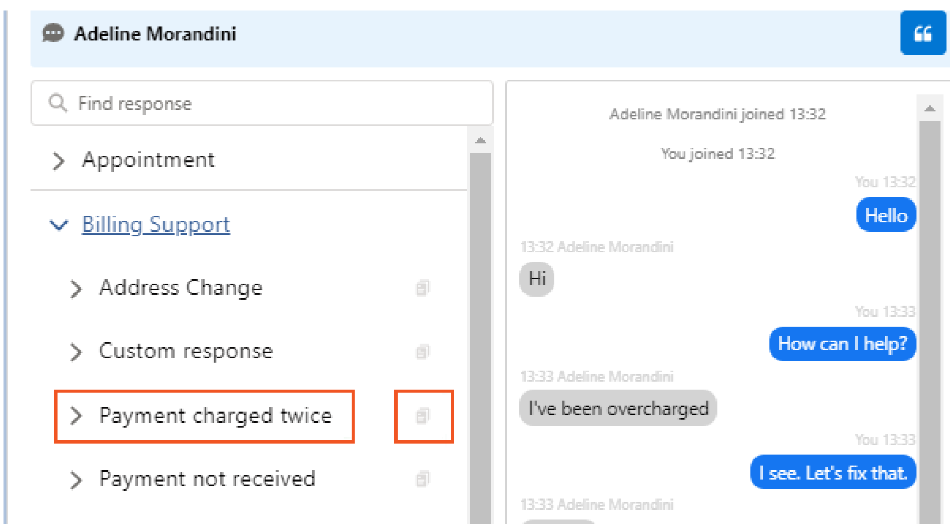
See https://help.mypurecloud.com/articles/canned-responses-overview/.

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.



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

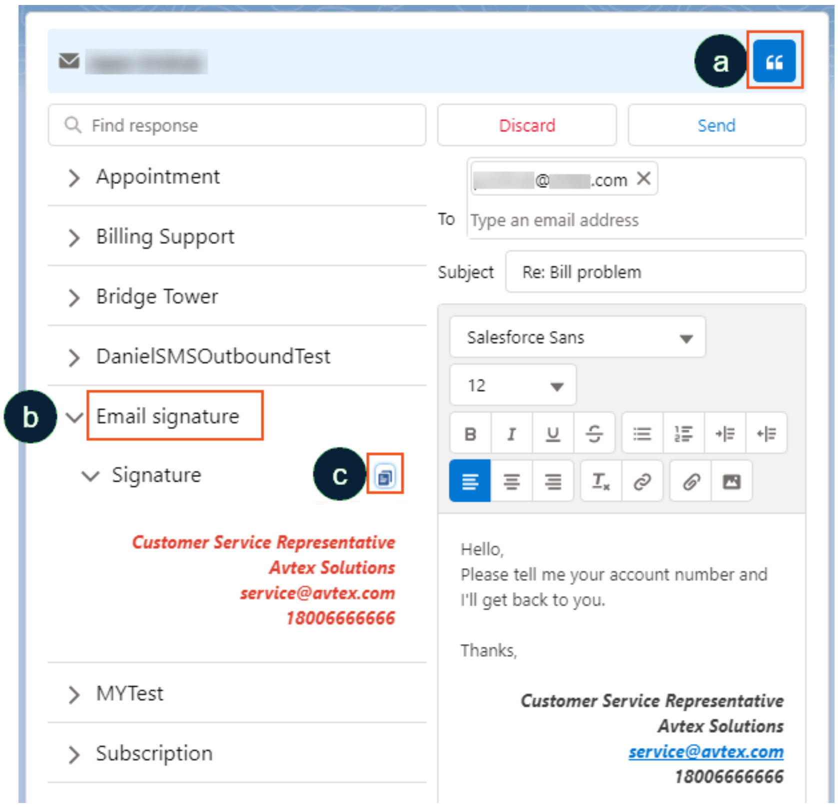
   For more information on using canned responses, see https://help.mypurecloud.com/articles/use-canned-responses-during-acd-interactions/.

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.

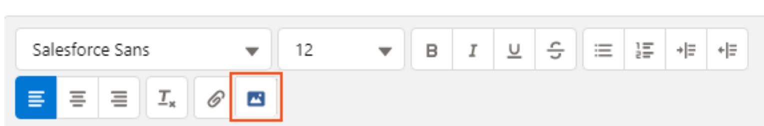


7.2.3 Insert inline image

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.

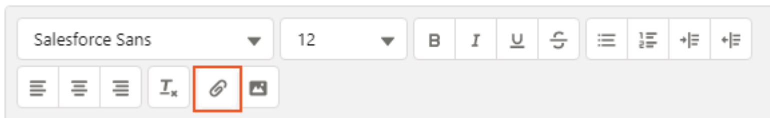
   Note: The permitted file types are .jpg, .png, and .gif.

7.2.4 Attach a file to an email

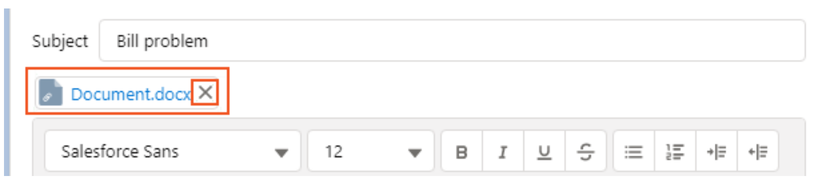
Agents can send attachments in an email.

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: [https://-docs.aws.amazon.com/ses/latest/DeveloperGuide/mime-types-appendix.html.](https://docs.aws.amazon.com/ses/latest/DeveloperGuide/mime-types-appendix.html)

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.

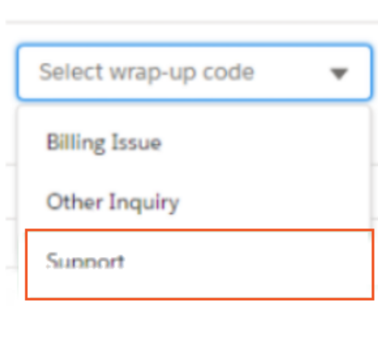
8 Troubleshooting

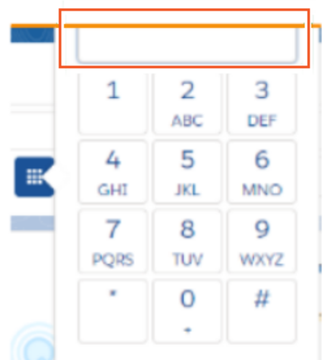
8.1 OneView controls not visible

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

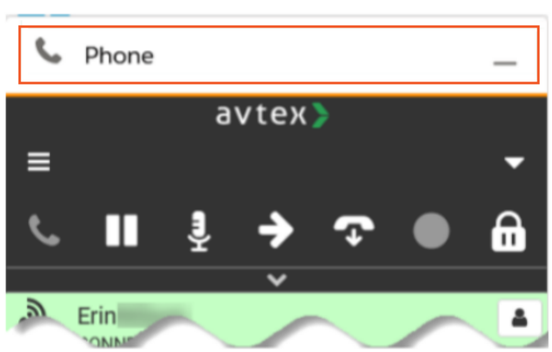
Depending on the amount of content configured on a Salesforce page, drop-down and/or pop-up items such as the directory search, wrap-up code list, or the keypad may be cutoff or appear underneath other Lightning app items. Refer these issues to your Salesforce/OneView Administrator to adjust the Lightning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

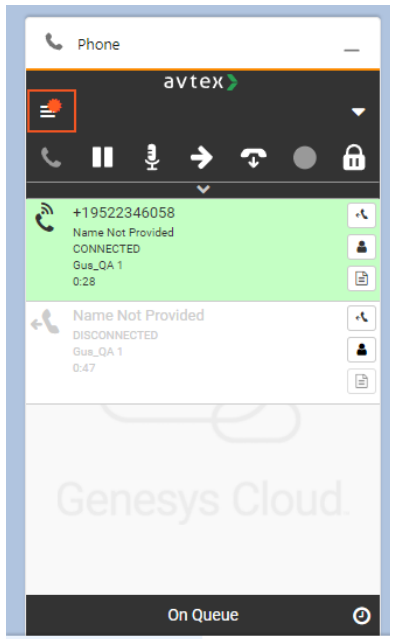


8.4 Schedule a callback button is gray

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.

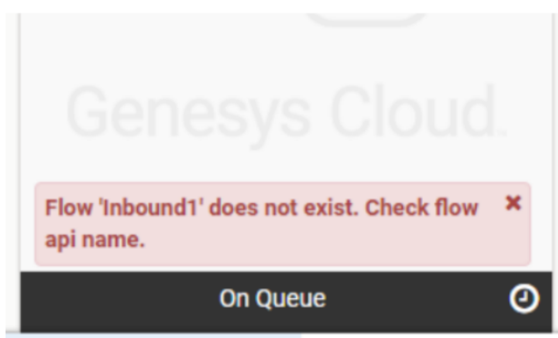
8.5 Interaction not displaying in tabs

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.



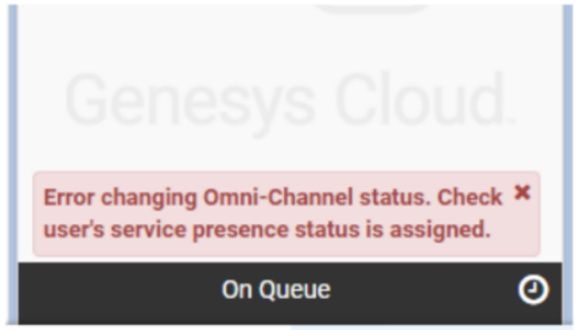
8.6 Salesforce flow errors

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.

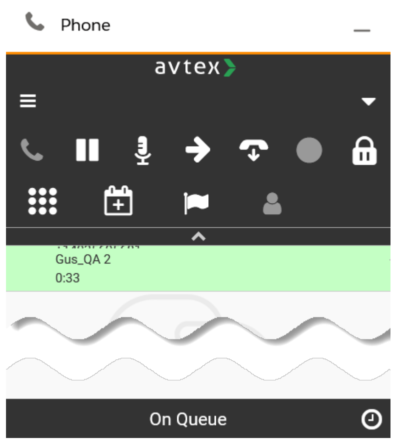


9 Appendix

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 https://help.mypurecloud.com/articles/call-controls/.



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 *Microphone* updates to *Accept an interaction* section. *Response field size* details are updated in the *Respond to Chat* section. Added *Get Transcript* feature to the *Getting Started* section. 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 *On Behalf of Queue* and *Direct dial* timer from *Alerting* to *Dialing*. 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. 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 *Communicate* 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.