

Service Cloud Voice: Guide for Admins

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Introduction to Service Cloud Voice

Service Cloud Voice is a feature for the Service Console that offers some of the following advanced capabilities:

- Integrates telephony and shows calls all on the Service Cloud platform
- Gives agents and supervisors real-time Omni-Channel visibility from the console
- Boosts agent productivity and shortens call times with fewer clicks and less data entry and wrap-up tasks
- Implements a phone channel quickly without code or API's

[See this Salesforce trailhead to learn more about the benefits of Service Cloud Voice](#)

Setting Up

We'll now break down what you'll need from a licence and technical pre-requisite perspective to get started.

Licence prerequisites

Your agents who will be using Service Cloud Voice need to have the following licences from Salesforce and Natterbox:

Salesforce

- Service Cloud
- Omni-Channel
- Partner Telephony

Natterbox

- Service Cloud Voice integration
- Call package

Technical prerequisites

Salesforce Omni-Channel

Omni-Channel needs to be configured and ready to use.

NB Service Cloud Voice is only available in Console Apps

Hardware

Users need to be on a PC or Mac computer, with the requirements following those of Salesforce Lightning - [see here](#)

Computers need to have built-in speakers and a microphone or ability to connect to these devices externally.

Audio equipment

Users will need to have speakers and a microphone enabled. While it is possible to use inbuilt desktop / laptop speakers, attaching an audio headset with a microphone will give better sound quality for the user, as well as preventing background noise and feedback for other participants on the call. If connecting to an external device via Bluetooth, the user will perform this set up in their computer settings.

Web Browser

Users need to be on the latest stable version of Google Chrome or Mozilla Firefox. Please note that Salesforce dictates the supported browsers, [see here](#) for more details and other restrictions to be aware of.

Salesforce version

Users need to be on Salesforce Lightning.

Salesforce Storage

Note, whilst call recordings made through Service Cloud Voice are stored on the Natterbox platforms the transcript texts themselves are sent and stored within Salesforce.

A transcription is estimated to consume between 0.5KB-2KB per minute.
Roughly 1.5KB-6KB for an average 3 minute call.
Roughly 1.5MB-6MB for 1000 average calls per day.

Web RTC

The Natterbox webphone allows you to make and receive calls from your device without the need to install any software. To check that your network is ready to start using webphone, you can use the test tool here: <https://test.webrtc.org/>

For more details on how to use the webphone, please see our [Client Advisories for Webphone and PBX](#)

Steps to be completed during setup

The Natterbox deployment team will complete the majority of steps required to get your company set up with Service Cloud Voice and there are a handful of things we'll need your help with along the way, shown below¹.

We'll need you to:

1. * Grant us System Administrator access to your org so we can install these packages:

¹ Please note there are some additional Salesforce features you may wish to take advantage of which will need to be completed by you or your Salesforce Integration partner. These are detailed in **Optional steps** at the end of this section

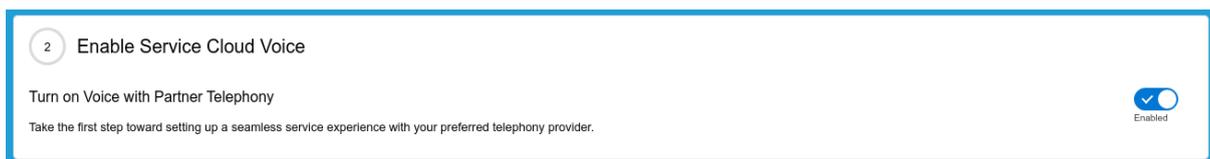
- Natterbox
- CTI
- Telephony Partner / BYOT package

*Someone from our deployment team will contact you once we're ready for you to do this.

Once you've given us access, please wait for the Natterbox Team to contact you to complete the steps that follow:

2. Enable Service Cloud Voice in Salesforce

- a. Enable the Service from Setup > Partner Telephony > Enable Service Cloud Voice > Enabled



3. Create an 'Available' status in Omni-Channel (so that your team can start making and receiving phone calls)

- a. Navigate Setup > Omni-Channel > Presence Statuses
- b. Click **New**
- c. Set the name to "**Available for Calls**" or something similar
- d. Ensure the **Status Options** is set to **Online**
- e. add **Phone** to **Selected Channels**
- f. Click **Save**

Presence Statuses

Let agents indicate when they're online and available to receive work items from a specific service channel, or whether they're away or offline.

Basic Information

Status Name:

Developer Name:

▼ Status Options

Choose whether agents are online or busy when they use this status. Online statuses let agents receive new work items. Busy statuses make your agents appear away and indicate that they're unavailable to receive work items.

Online
 Busy

▼ Service Channels

Select one or more service channels to assign to this presence status. Agents logged into this presence status can receive work from the channels you select.

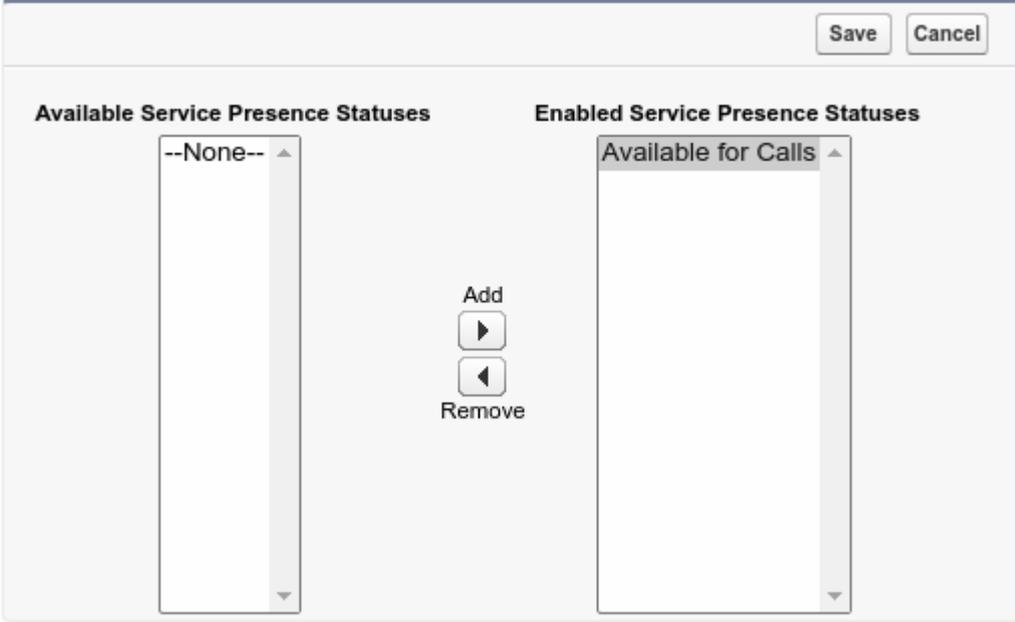
Available Channels

Selected Channels

Phone

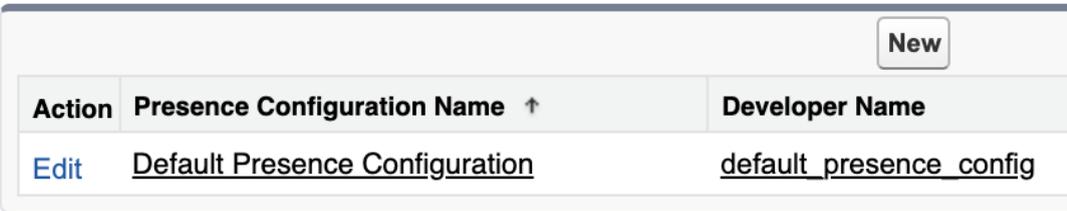
4. Go to relevant profile(s) in Salesforce and make the new statuses available to those profiles (Omni-Channel)
 - a. Navigate Setup > Profiles
 - b. Click on the name of the Profile you need to update
 - c. Click **Enabled Service Presence Status Access**
 - d. Click **Edit**
 - e. Assign the Available for Calls status you just created

Enable Service Presence Status Access



f. Click **Save**

5. Update the Presence Configuration to allow calls to be rejected
 - a. Setup > Omni-Channel > Presence Configurations
 - b. Edit the presence configuration you agents will be using :



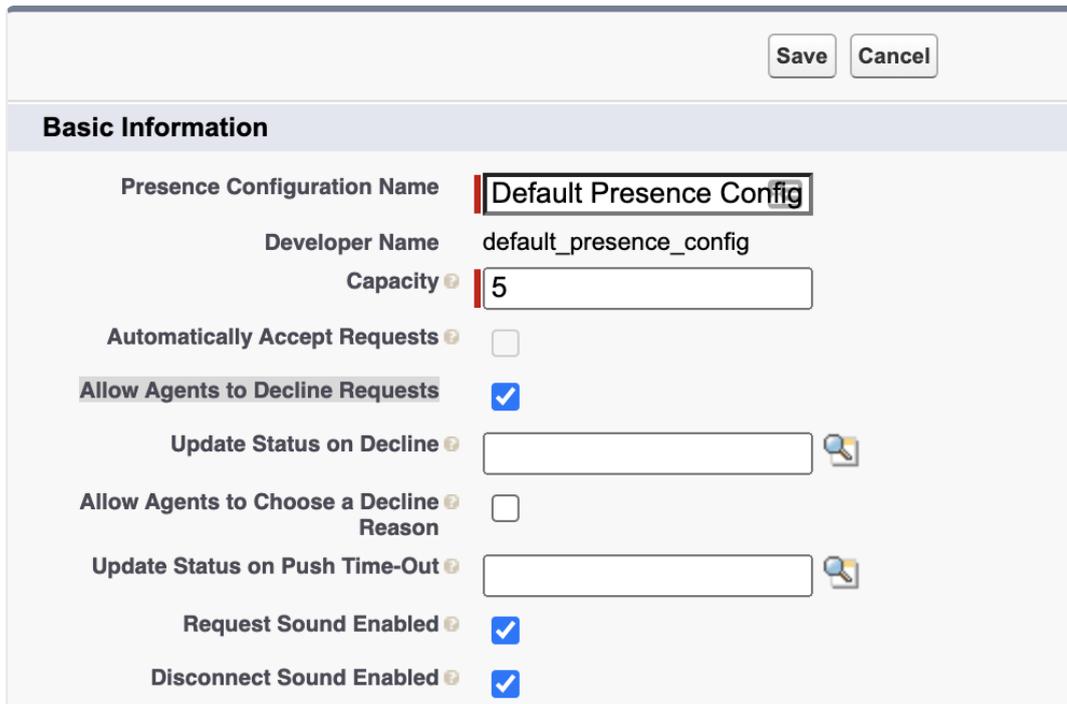
Action	Presence Configuration Name ↑	Developer Name
Edit	<u>Default Presence Configuration</u>	<u>default_presence_config</u>

c. Enable the option “**Allow Agents to Decline Requests**” :

Default Presence Configuration

Define how much work agents can accept and which Omni-Channel features they can access.

All agents are automatically assigned to the default presence configuration.



Save Cancel

Basic Information

Presence Configuration Name

Developer Name

Capacity

Automatically Accept Requests

Allow Agents to Decline Requests

Update Status on Decline

Allow Agents to Choose a Decline Reason

Update Status on Push Time-Out

Request Sound Enabled

Disconnect Sound Enabled

d. Click **Save**

6. Update users' profiles to make the **Voice Calls** tab visible (this is the one that shows your recent calls):

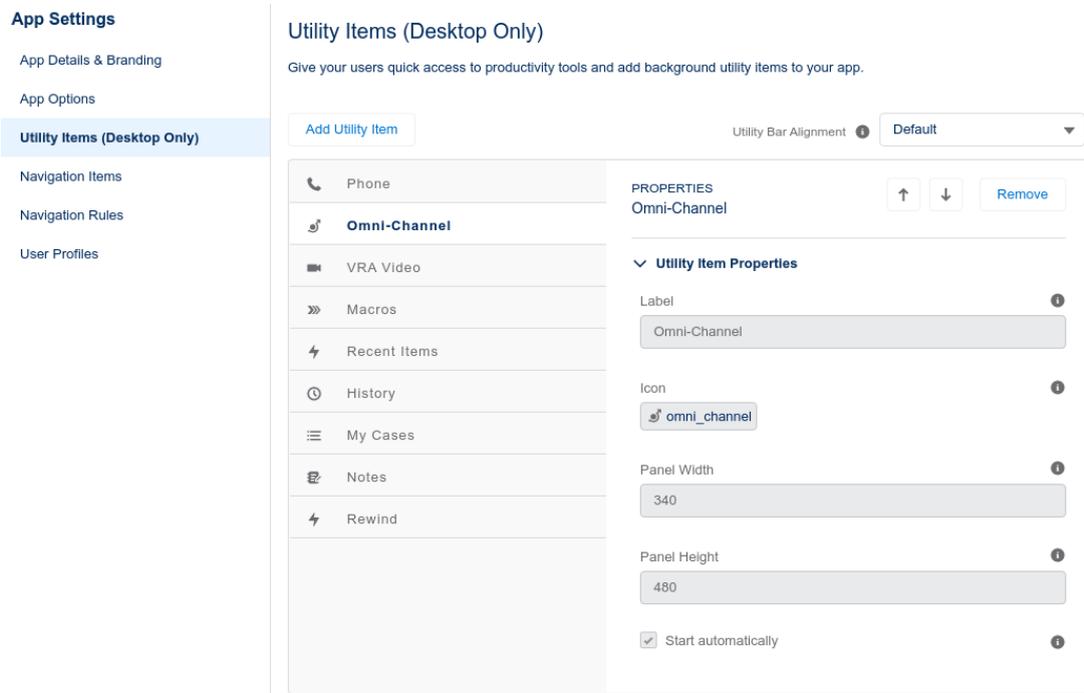
Setup > Profiles > Select the Profile > Edit > Voice Calls: Default On > Save

7. Add Omni-Channel widget as a utility item to relevant Lightning apps

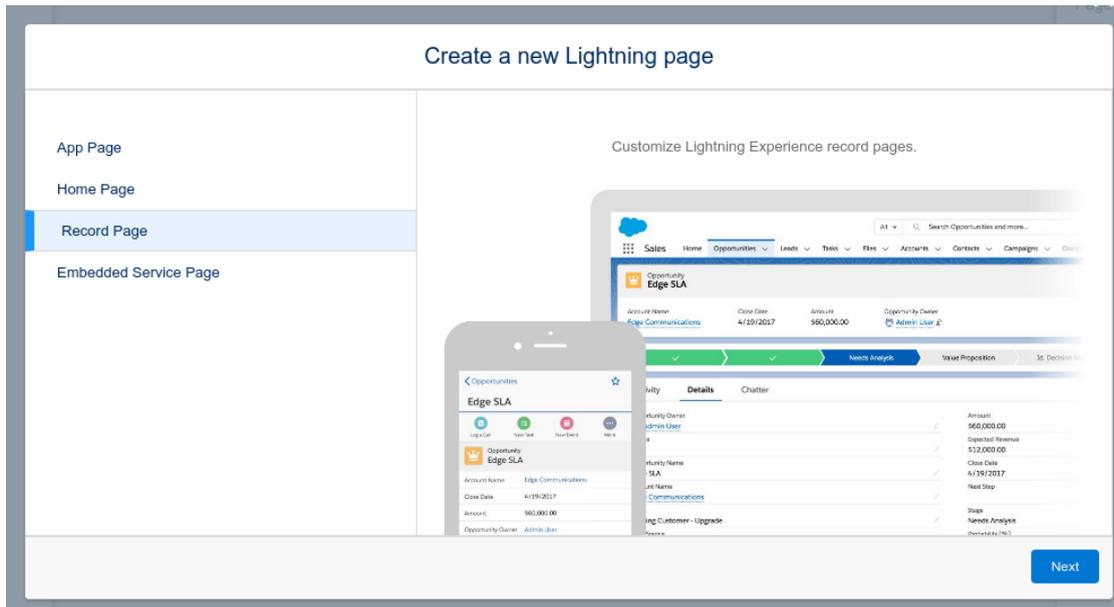
a. Add Omni-Channel to Salesforce Service Console

i. Setup > App Manager > Service Console > Edit > Utility Items > Add

Utility Item > Add **Omni Channel** > Save



8. Add the **Conversation** and **Recording UI** to the Service Console for viewing **Real Time Transcription** and playing back **Recordings**, also add the **Phone** controls for call controls inside the Voice Call object and alerts when closing the object
 - a. Setup > Lightning App Builder > New
 - b. Select **Record** **Page** and hit **Next**

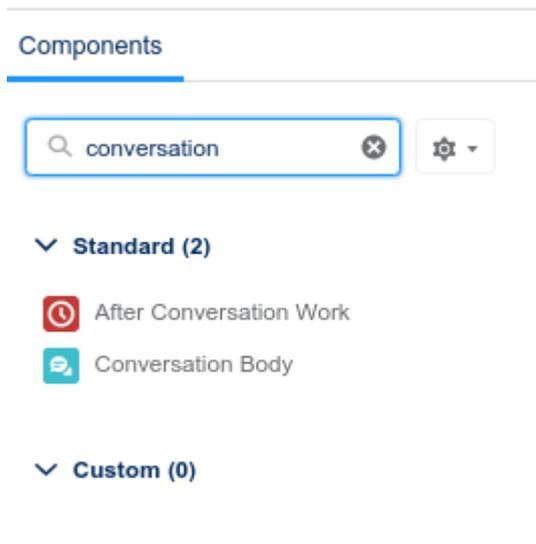


- c. Title the page **Voice Call Record Page** and select the Salesforce **Voice Call** object from the Object field and hit **Next**

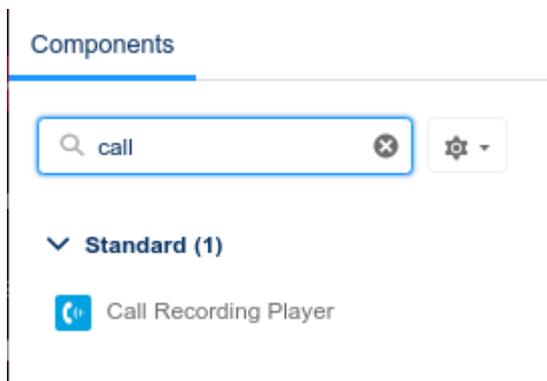
* Label

* Object

- d. Choose what kind of layout you want
- e. Once inside the Light App Builder for **Voice Call Record Page** search for **Conversation Body** from the Components panel



- f. Drag **Conversation Body** onto the desired location
- g. Search for the **Call Recording Player** from the Components panel



- h. Drag the **Call Recording Player** onto the desired location
- i. Search for the **Record Detail** component from the Components panel

Components

▼ Standard (1)

 Record Detail

- j. Drag the **Record Detail** component onto the desired location
- k. Search for the **Phone** component from the Components panel
- l. Drag the **Phone** component onto the desired location

Components

▼ Standard (1)

 Phone

- m. Save, Activate and then Assign as **Org Default** so all users will have this view, hit Next

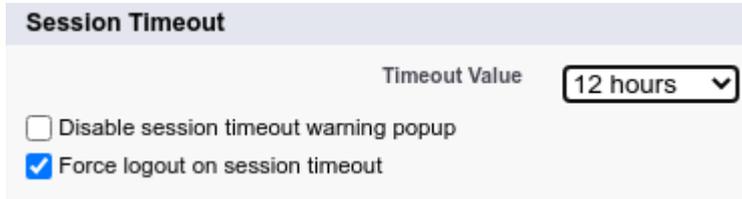
[Assign as Org Default](#)

- n. Select whether you want this layout for both Mobile and Desktop, but ensure at least Desktop is chosen
- o. **Save**
- p. You will see the layout of the Voice Call object in action once you've placed your first Service Cloud Voice call. If it's not how you want it simply navigate back to **Lightning App Builder** and edit the **Voice Call Record Page**

9. Amend the **Salesforce Session Settings**

- a. Setup > Session Settings
- b. Set **Timeout Value** to **12 Hours** (recommended)

- c. Check the option **Force logout on session timeout**
- d. Click **Save**



The screenshot shows a 'Session Timeout' configuration panel. At the top, there is a 'Timeout Value' dropdown menu set to '12 hours'. Below this, there are two checkboxes: 'Disable session timeout warning popup' (unchecked) and 'Force logout on session timeout' (checked).

- e. Setup > Profiles > Edit [Profile for Service Cloud Voice users]
- f. Set **Session Times Out After** to **12 Hours** (recommended)
- g. Click **Save**



The screenshot shows a 'Session Settings' configuration panel. It features a 'Session Times Out After' dropdown menu set to '12 hours of inactivity'. An information icon (i) is located to the right of the dropdown.

- h. Repeat the above steps for each Profile your Service Cloud Voice users will be using

Note the following two options involve configuring users with non-Natterbox Webphone devices (OTT, MS Teams, Yealink, Softphone).

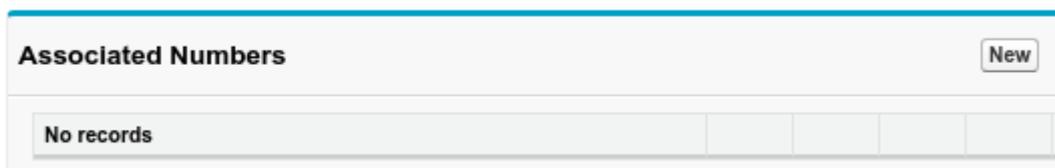
Natterbox will configure this for you as part of the initial deployment of Service Cloud Voice, but please note that any further users you provision that wish to use any of these devices will need these steps carried out before they can use it with Service Cloud Voice.

10. (Optional) Configure user's to use a OTT Device or MS Teams device

If your users need to use an OTT device (or an MS Teams Device) as their endpoint for Service Cloud Voice, note that MS Teams Devices are configured the same way as an OTT Device. For each user ensure they have an OTT device added to their Natterbox

User record.

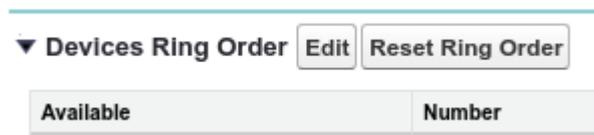
1. Navigate to **Natterbox Users** from the Natterbox App
2. Edit the User Record by clicking onto the name of the User
3. Navigate to **Associated Numbers** and confirm whether they have an OTT device configured



- a. If no OTT devices have been configured, click **New**
 - b. Add your OTT number and set the type appropriately for the kind of device it is
 - c. The other settings can be set based upon the requirements of how the device will be used, [see more on this here](#)
 - d. Hit **Save**
4. Click **Edit** on the user's record
 5. Under the field **Monitored Device** select the OTT Device
 6. Hit **Save**
 7. In order for the user to start using the OTT or MS Teams Device, the user will need to log out and back in again **OR** dial **##0** from the Service Cloud Voice dialler in order to reload their settings
 8. (Optional) Configure users to use a Yealink or Softphone

If your users need to use a Yealink deskphone or a Softphone device as their endpoint for Service Cloud Voice, ensure each user has a Yealink or Softphone device added to their Natterbox User record.

- a. Navigate to **Natterbox Users** from the Natterbox App
- b. Edit the User Record by clicking onto the name of the User
- c. Navigate to **Devices Ring Order** and confirm whether they have a Yealink or Softphone device configured



- i. If no Yealink/Softphone devices have been configured click navigate to the **Devices** tab
 - ii. Click **New Device**
 - iii. Configure your device as appropriate, [see more on this here](#)
 - iv. Hit **Save**
 - v. Return to the User Record from **Natterbox Users**
 - vi. Click **Edit** on the **Devices Ring Order**
 - vii. Click **Assign Devices**
 - viii. Search for the recently created device, highlight and click **Add**
 - ix. Hit **Save**
- d. Click **Edit** on the user's record
 - e. Under the field **Monitored Device** select the Yealink or Softphone Device
 - f. Hit **Save**
 - g. In order for the user to start using the Yealink or Softphone Device, the user will need to log out and back in again **OR** dial **##0** from the Service Cloud Voice dialler in order to reload their settings

11. Complete!

Optional Steps

The setup steps below are also to be performed by you or your Salesforce Integration partner in Salesforce. While not required to get the basic Service Cloud Voice integration to work, they will significantly improve your users' experience of Service Cloud Voice.

Languages

Service Cloud Voice will now have the ability to support different languages and dialects for the dynamic voice transcription.

We currently have support for the following languages/dialects :

- English (Generic)
- German
- French
- Spanish

How to enable different languages

By default, the chosen language will always be generic English which attempts to best handle English across the different dialects, so it's recommended to choose a region specific dialect for offices in the same location.

Account Level

Within AVS on the account settings page, the option to change the language for all users is available.

▼ **Service Cloud Voice Settings**

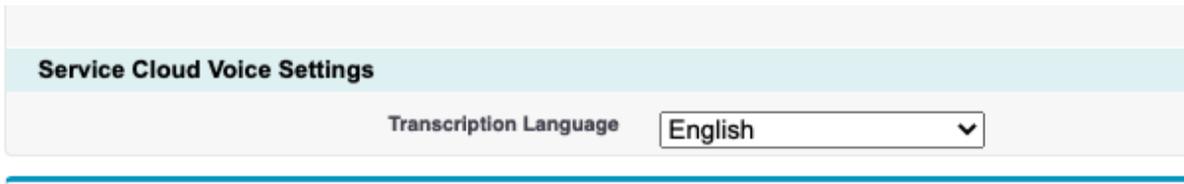
Next Best Action Integration Enabled

Transcription Language ▼

User Level

Within AVS on the user record, the option to change the language for a specific user is also available, this will override the account level setting.

This can be useful for organisations where different users are handling calls from different regions and which need to be transcribed in the native language.

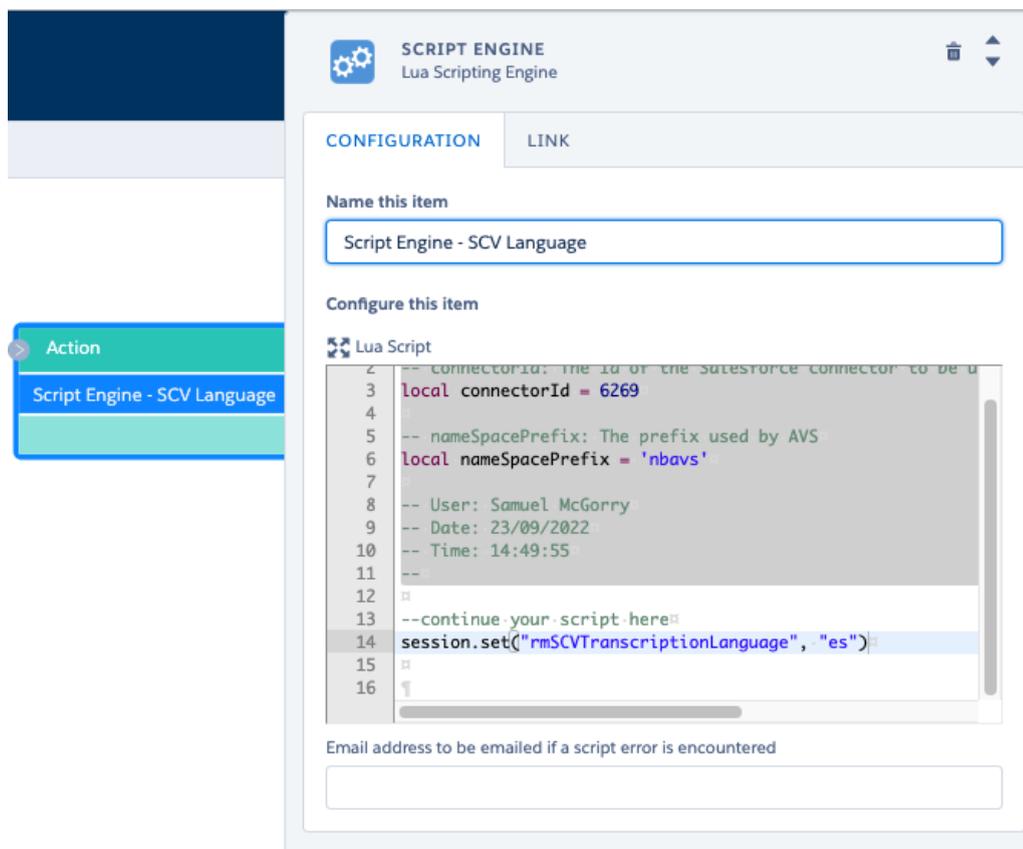


Routing Policy Level

Within AVS on the routing policy, the option to change the language for all particular calls is also available, this will override both the account and user level settings.

This can be useful for organisations that handle calls from different regions, the language setting can be placed after different regional numbers to ensure the matching language is always selected when a call hits a particular number. This will also solve the ability to support agents who are bi-lingual and are switching between languages when taking calls from different regions.

The language setting can be enabled using a Script Engine component in the routing policy :



1. Add a new **Script Engine Action** component **before** you connect **Connect** component
2. Add the line `session.set("rmSCVTranscriptionLanguage", "")`

3. Within the second parameter (the second set of quotations) enter the desired country code
 - English (Generic) : **en**
 - German : **de**
 - French : **fr**
 - Spanish : **es**

Note currently you will only be able to change languages for outbound calls

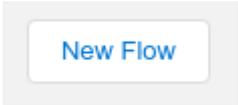
Next Best Action

Salesforce Next Best Action is an Einstein feature which allows you to provide recommendations to your agents using a set of rules and conditions. With the Natterbox Integration you will be able to use the live transcripts from agents' calls to pick up on key terms and phrases to invoke Next Best Action and make a recommendation in real time. [See more on Next Best Action here.](#)

Note next best action requires the Natterbox App 1.99 or greater.

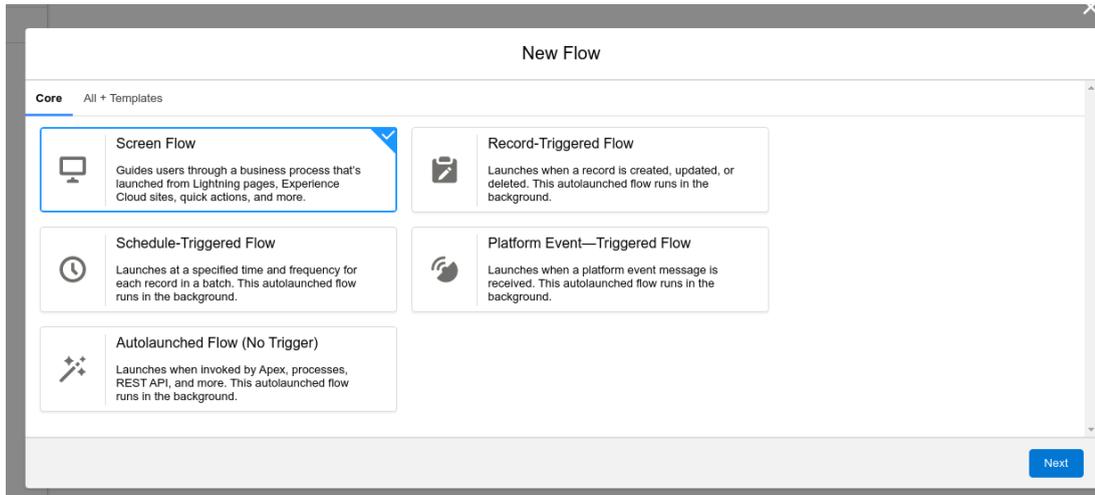
Configuring Next Best Action

1. Navigate Setup > Flows
2. Create a New Flow

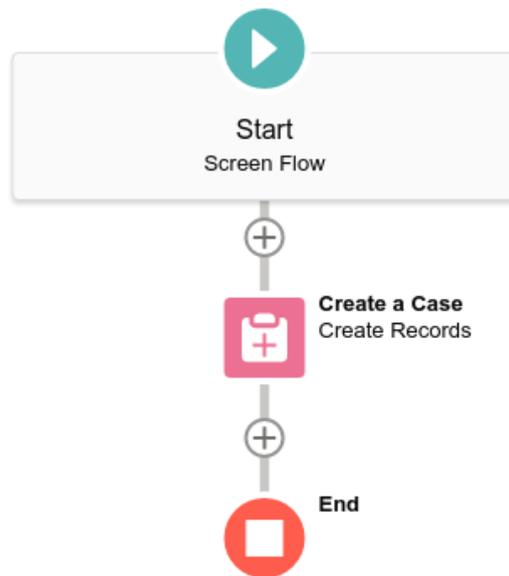


New Flow

3. Select Screen Flow
4. Click Next



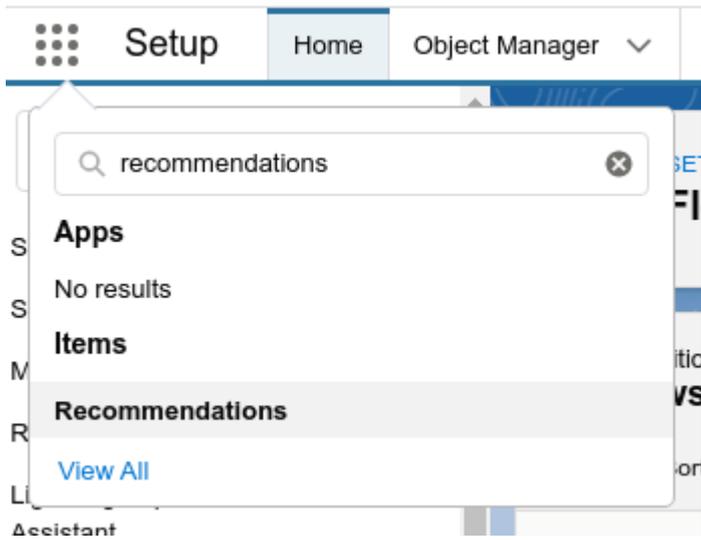
5. Select a method of creating a flow (Freeform or Auto-Layout)
6. Create a Flow based upon your requirements



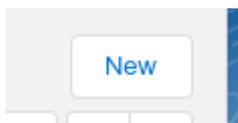
(Basic Salesforce Case creation example flow)

7. Click Activate
8. Click Save

9. Navigate to the Recommendations App



10. Create a New Recommendation



New Recommendation

Detail Information

*Name

*Description

Image 

Response Information

*Acceptance Label

*Action

*Rejection Label

(Basic confirmation recommendation)

11. Click Save
12. Navigate Setup > Next Best Action
13. Create a New Strategy

[New Strategy](#)

14. Set a name and description for your strategy
15. Choose Voice Call under Object Where Recommendations display

New Strategy

* Name

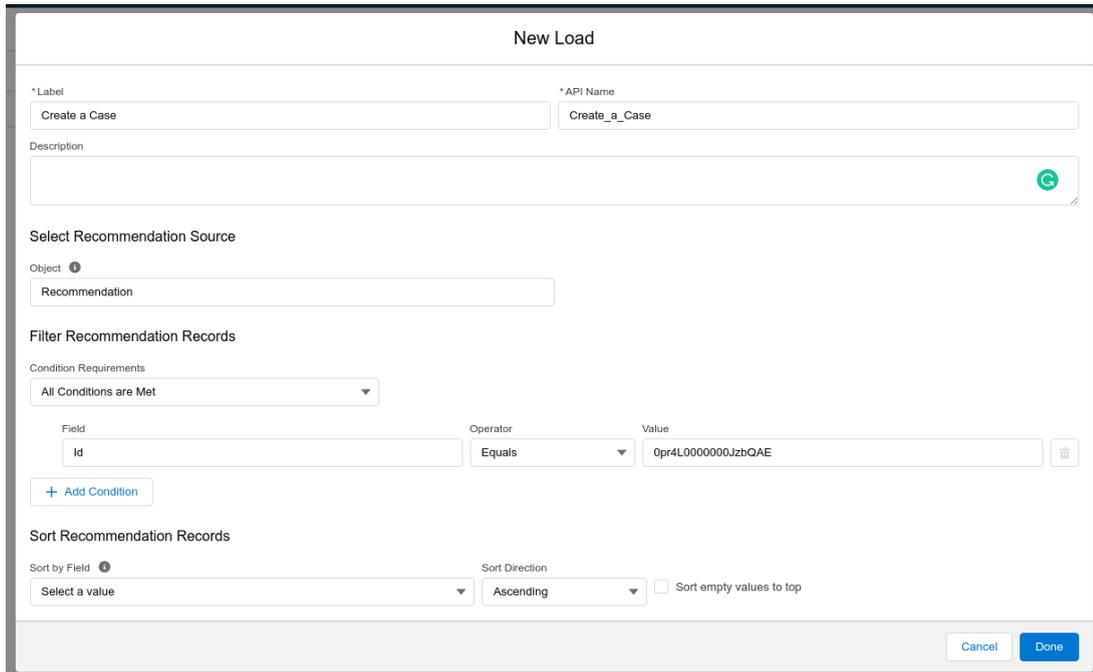
* API Name

Description

Object Where Recommendations Display i

Template i

16. Click Done
17. Create a Load and set to the Recommendation you have created



18. Add a Filter (where the transcription criteria will be set)

- a. Set a Label and Description for your Filter
- b. Set a Filter criteria and set the resource to \$Request.intent
- c. Set a Operator to match your criteria by (Text Contains is recommended for general word/phrase matching as part of a conversation)
- d. Set a Value to match on, this value must be lowercase and must be enclosed with single quotation marks (i.e. 'help')
- e. Repeat the steps above if you need to add any additional conditions

New Filter

* Label

* API Name

Description

Standard Advanced

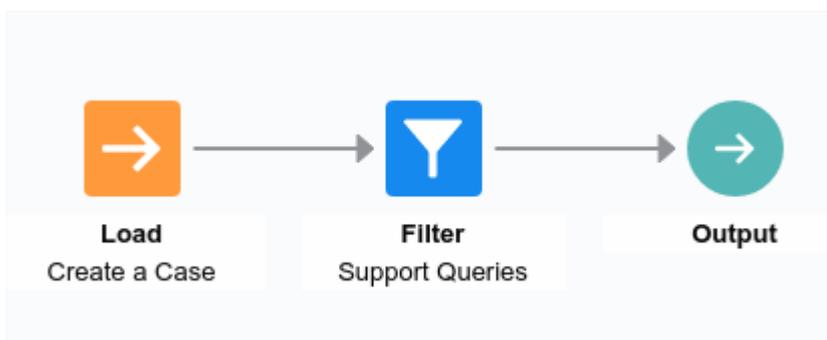
When to Execute Filter

Any Condition Is Met ▼

<small>Resource</small>	<small>* Operator</small>	<small>Value</small>	
<input type="text" value="\$Request.intent"/>	<input type="text" value="Contains"/> <small>Q</small>	<input type="text" value="'help'"/>	
OR <input type="text" value="\$Request.intent"/>	<input type="text" value="Contains"/> <small>Q</small>	<input type="text" value="'aid'"/>	
OR <input type="text" value="\$Request.intent"/>	<input type="text" value="Contains"/> <small>Q</small>	<input type="text" value="'I need support'"/>	

[+ Add Condition](#)

19. Click Save



(Basic Case creation Flow)

20. Navigate to Setup > Lightning App Builder
21. Edit the Voice Call Record Page
22. Search for the Einstein Next Best Action from the components panel
23. Drag the Einstein Next Best Action component onto the Voice Object onto the desired location

Components

✕
⚙️ ▾

▼ **Standard (1)**

 Einstein Next Best Action

24. Edit the Einstein Next Best Action component

25. Link the new Strategy to the component

Title ⓘ

Hide Einstein Header

* Strategy Source ⓘ

✕

* Action Strategy ⓘ

✕

Maximum Recommendations Displayed

✕

Hide Empty Component ⓘ

26. Search for the Natterbox BYOT Next Best Action from the components panel

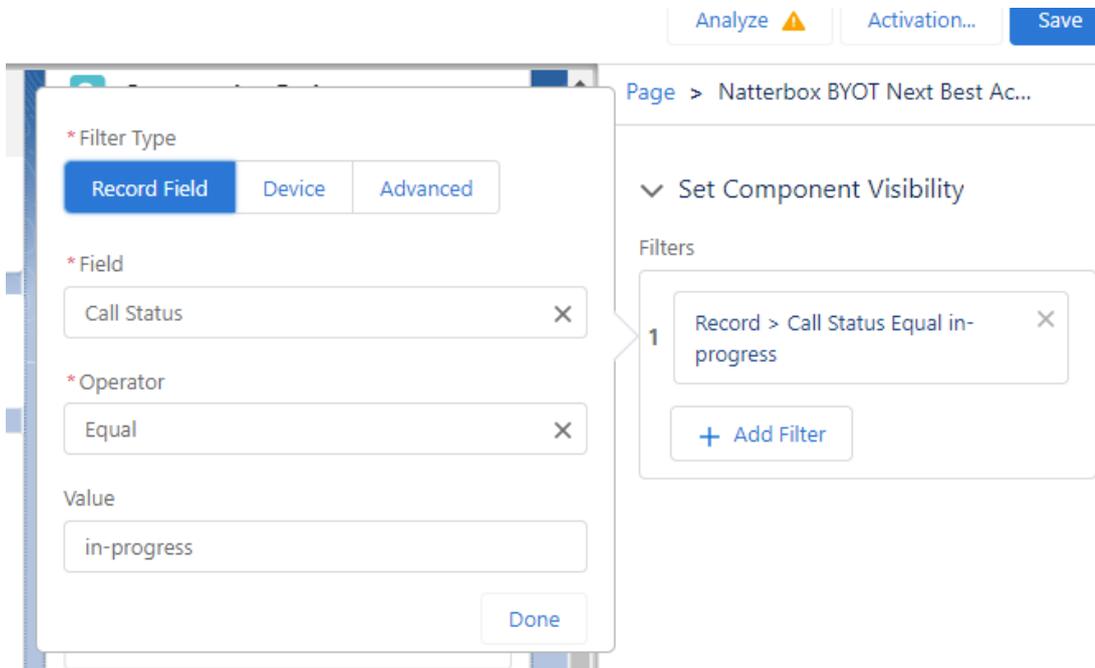
27. Drag the Natterbox BYOT Next Best Action component onto the Voice Object

Note this component will not be visible from the object, the component just needs to be present

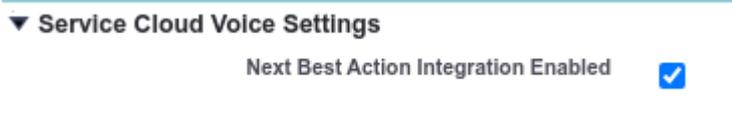
28. Edit the Natterbox BYOT Next Best Action component

29. Click Add Filter

- 30. Under Field search and select Call Status
- 31. Ensure the Operator is set to Equal
- 32. Under Value enter “in-progress”



- 33. Click Save
- 34. Navigate to Natterbox App > Account Settings
- 35. Check Next Best Action Integration Enabled



- 36. Set the Transcription Event Batch Size (it’s recommended to be left at 1)



Note when the batch size is left at 1 it will produce the quickest response time, but it will request more Next Best Action requests per call. See here for Next Best Action limits, if your organisation begins to reach these limits simply increase the size of the batches to reduce the usage (keep in mind this will increase the delay before a recommendation is made)

37. Done! Now perform a test by initiating a Service Cloud Voice call and saying one of the preconfigured phrases

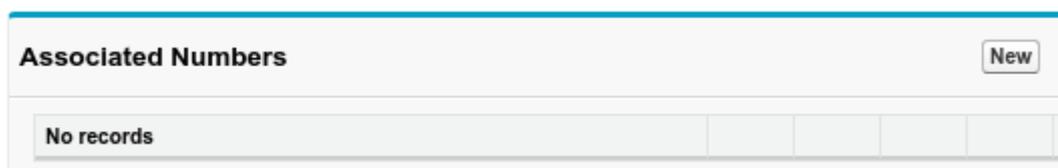
Note allow up to a minute for response time, though normally it should not be much longer than 10 seconds.

Further note: transcript is combined into one, so words and phrases will search on both customer and agent together - there's currently not an option to separate these out.

Configuring a user to be able to use an OTT or Microsoft Teams device

Note that MS Teams Devices are configured the same way as an OTT (Over the Top) Device so, for each user, ensure they have an OTT device added to their Natterbox User record.

1. Navigate to **Natterbox Users** from the Natterbox App
2. Edit the User Record by clicking onto the name of the User
3. Navigate to **Associated Numbers** and confirm whether they have an OTT device configured



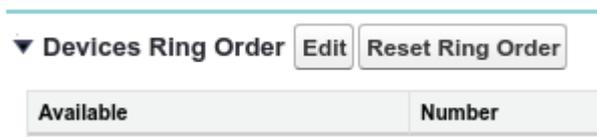
- a. If no OTT devices have been configured click **New**
- b. Add your OTT number and set the type appropriately for the kind device it is
- c. The other settings can be set based upon the requirements of how the device will be used, [see more on this here](#)
- d. Hit **Save**
4. Click **Edit** on the user's record
5. Under the field **Monitored Device** select the OTT Device
6. Hit **Save**

7. In order for the user to start using the OTT or MS Teams Device, the user will need to log out and back in again **OR** dial **##0** from the Service Cloud Voice dialler in order to reload their settings

Configuring a user to be able to use a Yealink or Softphone

Ensure users have a Yealink or Softphone device added to their Natterbox User record.

- a. Navigate to **Natterbox Users** from the Natterbox App
- b. Edit the User Record by clicking onto the name of the User
- c. Navigate to **Devices Ring Order** and confirm whether they have an Yealink or Softphone device configured



- i. If no Yealink/Softphone devices have been configured, navigate to the **Devices** tab
- ii. Click **New Device**
- iii. Configure your device as appropriate, [see more on this here](#)
- iv. Hit **Save**
- v. Return to the User Record from **Natterbox Users**
- vi. Click **Edit** on the **Devices Ring Order**
- vii. Click **Assign Devices**
- viii. Search for the recently created device, highlight and click **Add**
- ix. Click **Save**
- d. Click **Edit** on the user's record
- e. Under the field **Monitored Device** select the Yealink or Softphone Device
- f. Hit **Save**
- g. In order for the user to start using the Yealink or Softphone Device, the user will need to log out and back in again **OR** dial **##0** from the Service Cloud Voice dialler in order to reload their settings

User Guide

Here we break down key features of Service Cloud Voice and how you will use them.

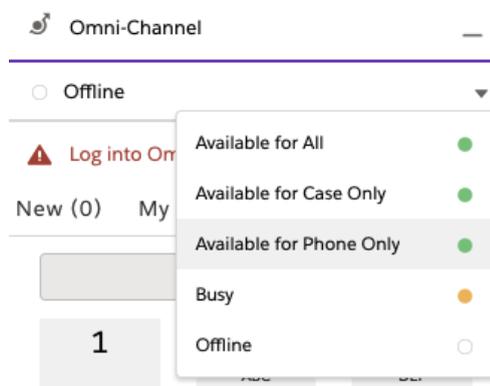
Accessing Service Cloud Voice

- **Login** to Salesforce
- Go to **Service Console**
- **Allow** use of Microphone (has to be enabled on first time of using only)
- Open the **Omni-Channel** widget (bottom left of your screen, see below) by clicking on it

Note, Service Cloud Voice will work outside of outside of Service Console as long as Omni-Channel has been configured for that Salesforce Lightning App

 **Omni-Channel (Offline)**

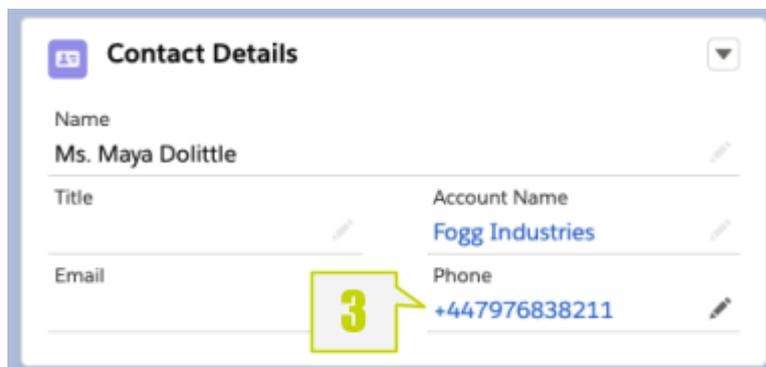
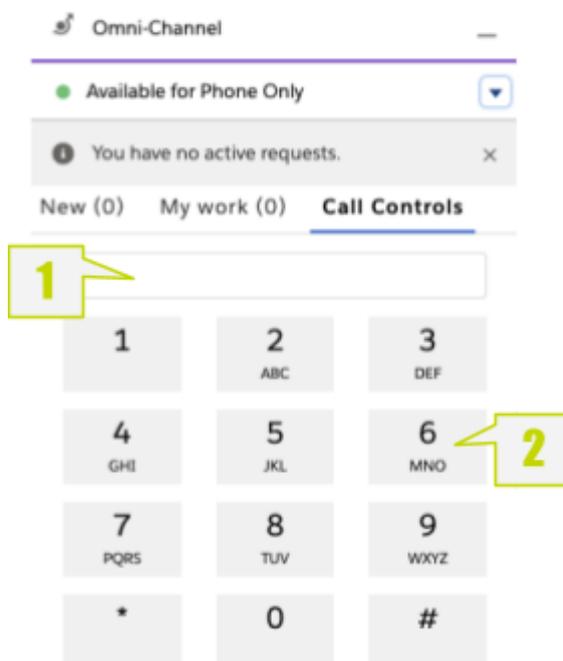
Once the Omni-Channel widget is open, choose the appropriate **Availability status** to enable you to make / receive calls (example highlighted below). Note that if you don't do this, you won't be able to make or receive any calls!



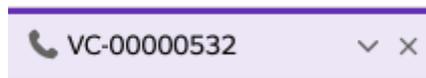
Making a call

There are three ways in which you can make a call using Service Cloud Voice:

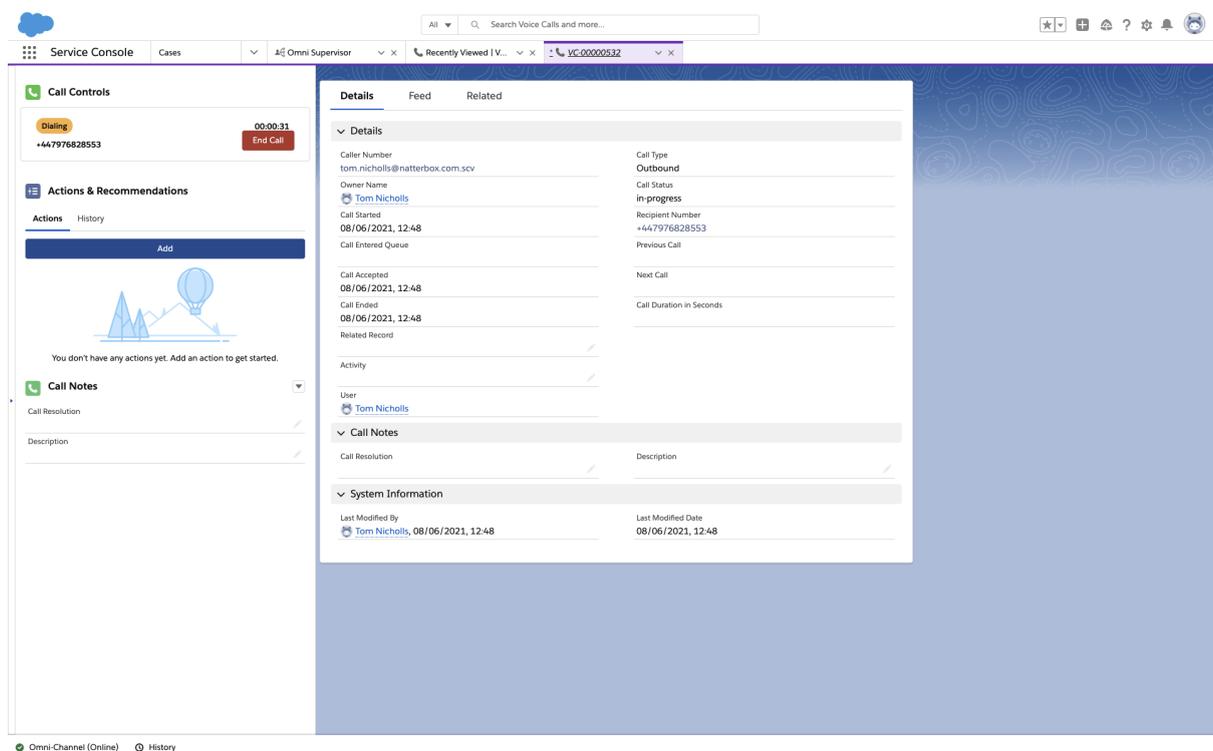
1. Enter the number directly into the **dial field** using your keyboard
2. Tap the number in on the **keypad**
3. **Click-to-dial** a phone number that's highlighted in blue from anywhere in Salesforce (example shown from Contact Details below)



Once the call has been initiated, a new Voice Call tab (object) will appear:



and will open, like this:

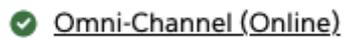


[Click here for Voice Call object details](#) (please note the Voice Call object is a Salesforce-managed entity)

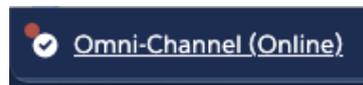
[See here for details of what you can do once the call is live](#)

Receiving a call

When you receive an inbound call, if your Omni-Channel widget is currently closed, you will see it change colour from this:

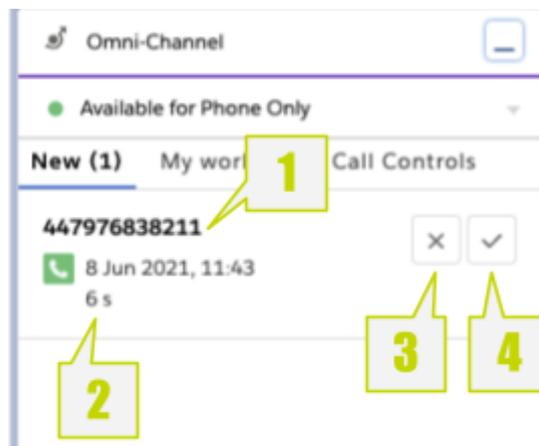


to this:

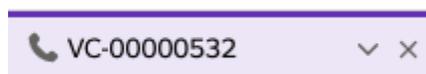


The Omni-Channel widget will show information about the inbound call in the **New** tab:

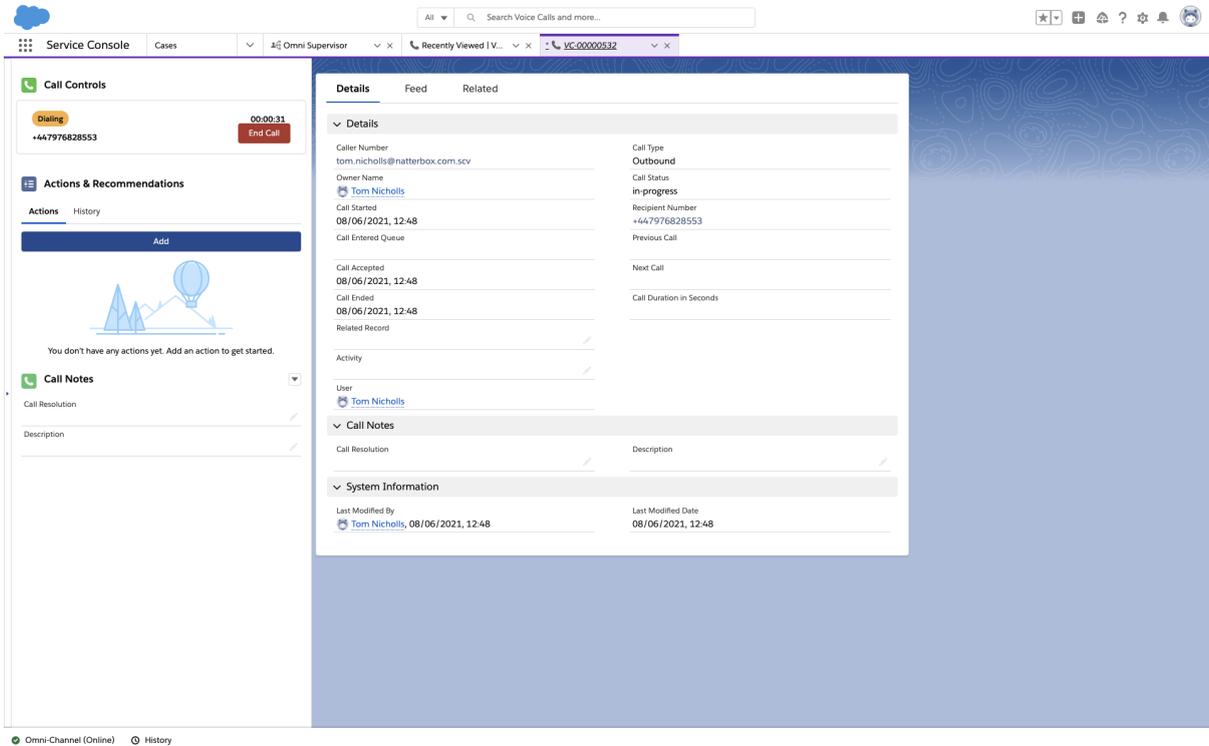
1. Caller number
2. Time elapsed
3. Reject call
4. Accept call



On clicking **Accept Call**, a new Voice Call tab (object) will appear, like this:



and will open, like this:



[Click here for Voice Call object details](#) (please note the Voice Call object is a Salesforce-managed entity)

[See here for details of what you can do once the call is live](#)

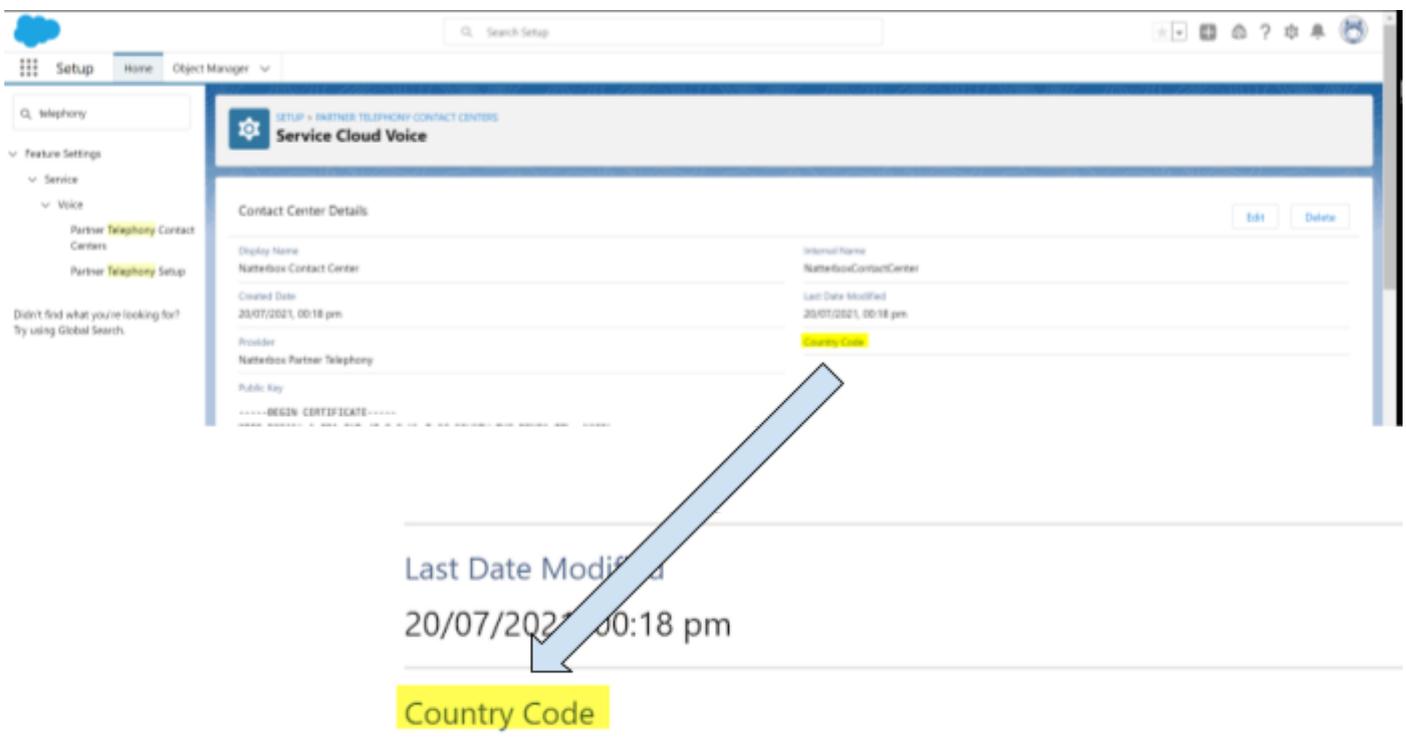
Failing to receive a call

In the event a SCV user is unable to answer an inbound call, the routing policy will still carry on.

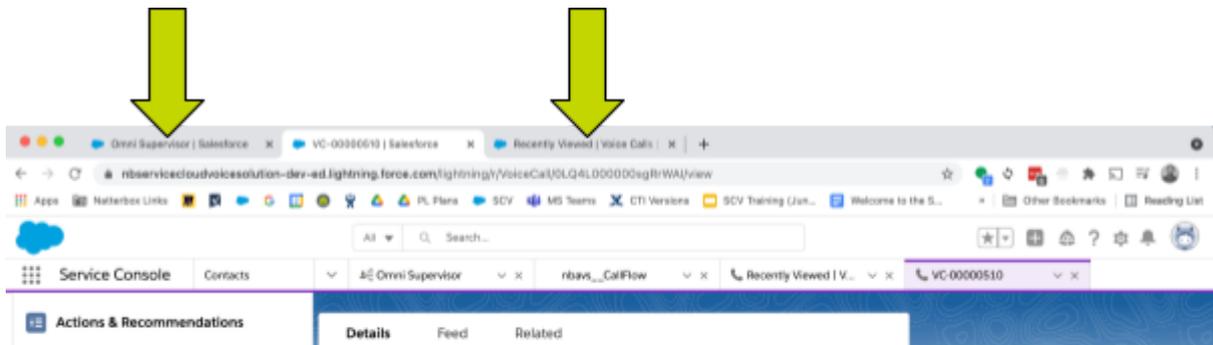
Assuming the routing policy finishes on a Voicemail component, Voicemail will still be recorded but as no agent answered the call no Salesforce Voice Call Object will be generated either so the customer’s recording will not be transcribed.

Things to remember when making and receiving calls:

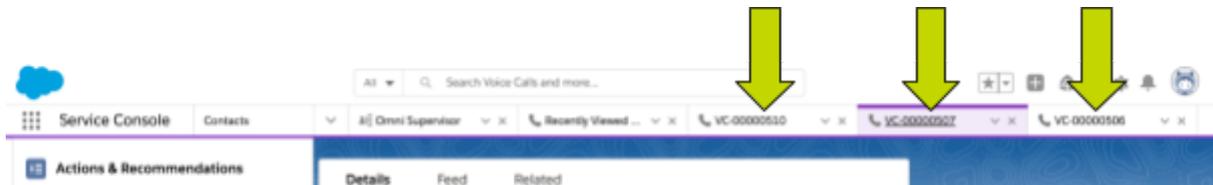
- Ensure you have already chosen the appropriate **Availability status** to enable you to receive (and make) calls
- (Outbound only) If your Admin has set up an exit code (eg +44 for UK) then all calls will be automatically prefixed with this unless you input another. If your Admin has not set up an exit code (this scenario is shown in the screenshot below), you will need to prefix all calls with this, removing the first “0” For example the UK number 07976838234 becomes **+447976838234**. This is the case regardless of which of the 3 dialling options you choose).



- You can only have one Salesforce console window open at a time to be able to make and receive calls. In this example below you will need to close two of the windows:



- All Voice Call tabs (those that start with **VC**) need to be closed to be able to make and receive calls, like this²:

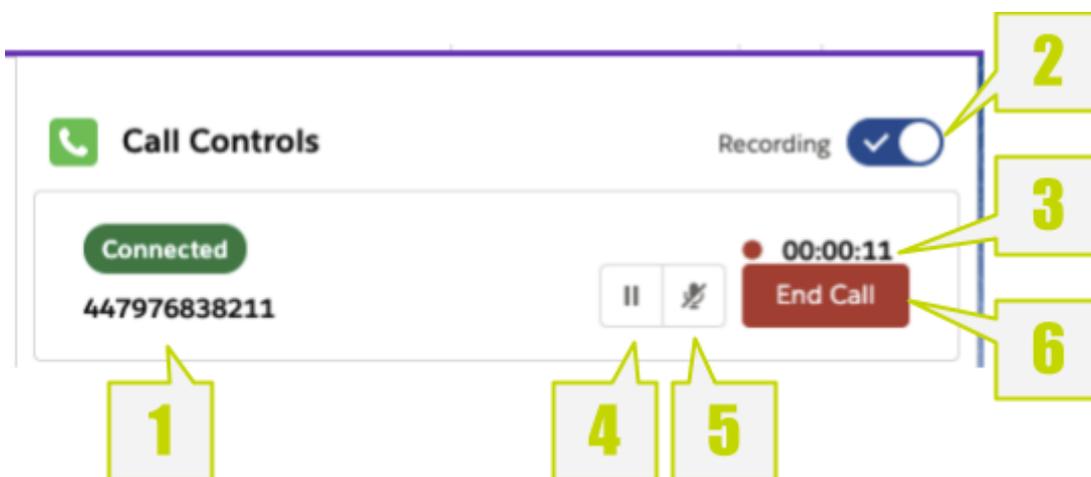


² Unless your Admin has enabled **After Conversation Work** in which case you can have multiple Voice Call tabs open

Once you're on a call

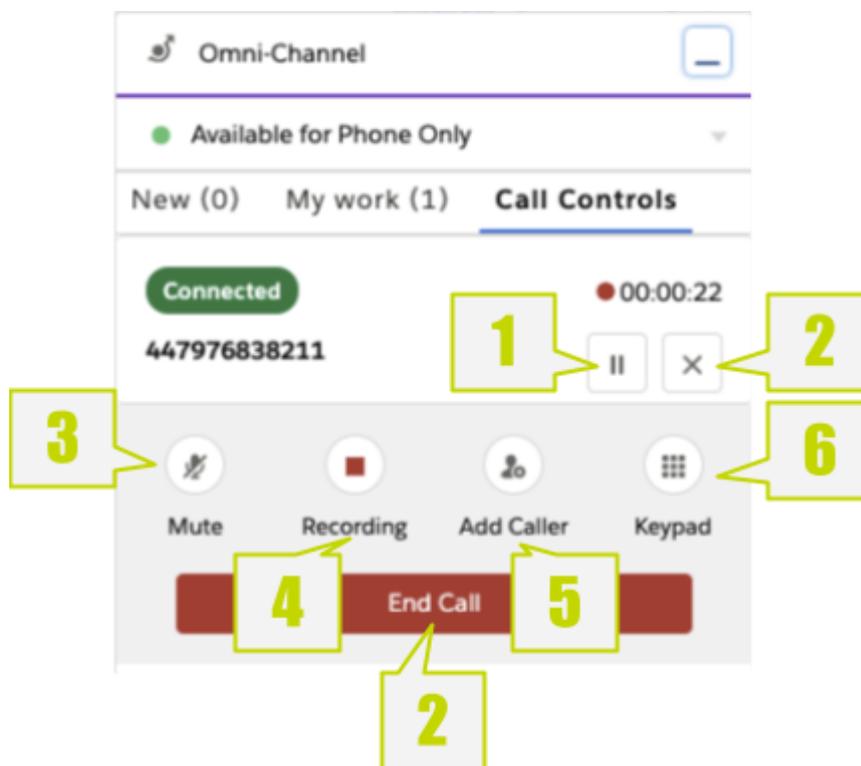
In Service Console you will see the following summary call controls once you're on a call:

1. Caller number
2. Pause / Resume Call Recording (showing as active here)
3. Call duration
4. Place call on hold
5. Mute call
6. End Call



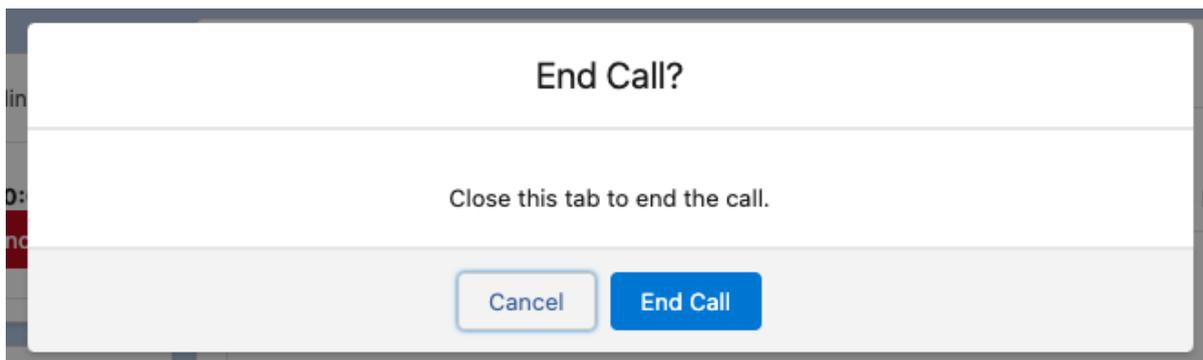
To access full call controls, click on the Omni-Channel widget which will take you to the **Call Controls** tab:

1. Place call on hold
2. End Call
3. Mute Call
4. Pause / Resume Call Recording (showing as active here)
5. Add Caller (for transfers, [see next section](#))
6. Open keypad

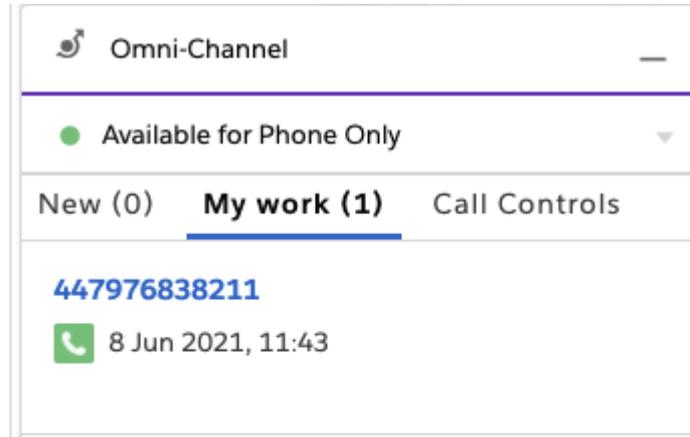


Note if you close the Voice Call object whilst on a call your call will be terminated.

If you haven't added the **Phone** component to the page layout you will **not** receive the following alert and instead you will have your call immediately terminated, to add this component [please see here](#) :

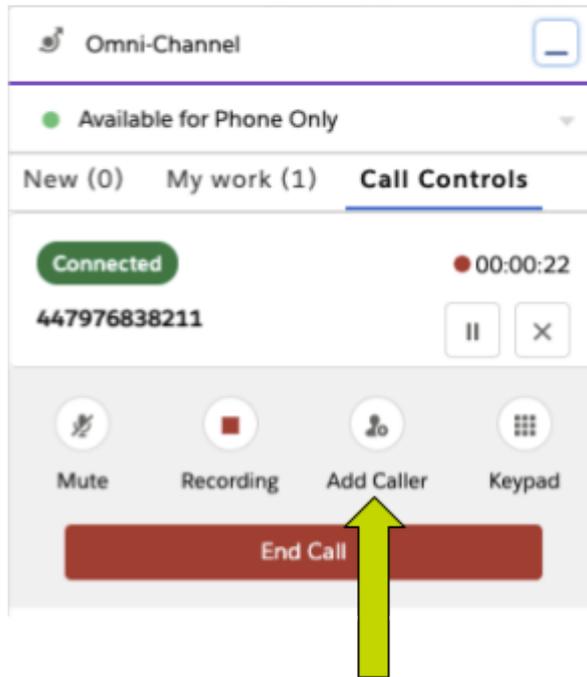


Clicking on **My work** will also show you the date and time the call commenced.

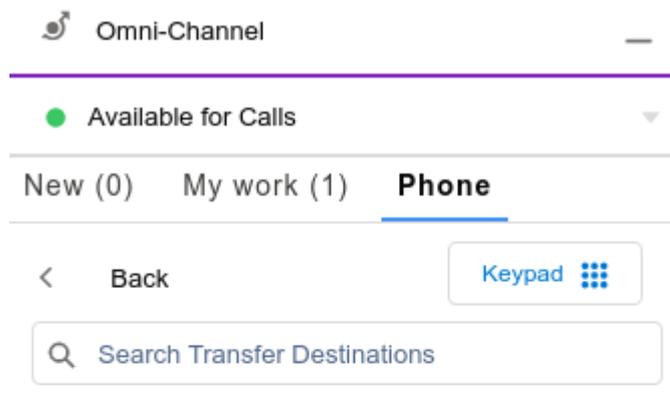


Transferring a call / adding another participant

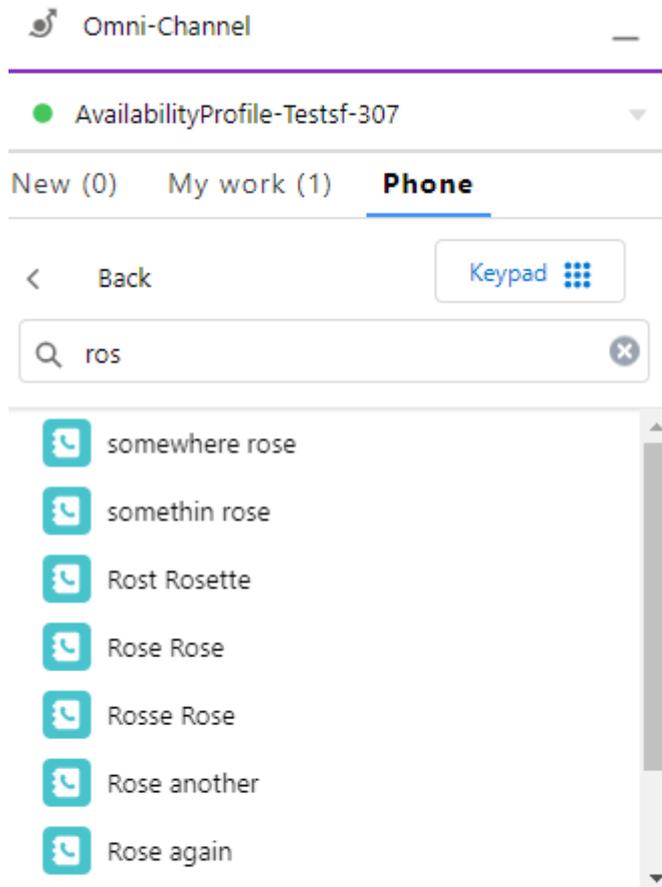
During a call, click the **Add Caller** button as below:



This will take you to the following screen where you can search for a Contact from the **Search Transfer Destinations** box:



Note you must enter at least three characters before results will be returned, as below:



Click on the Contact you wish to dial from from the results and click **Call** to begin a transfer to that Contact's associated number.

If you hover over the contact you will see the number that will be dialled when initiating the transfer.

Note when making an internal transfer to another agent, the receiving agent will need to be logged in and available calls using the Omni Channel Presence in order to receive the call, otherwise the transfer will fail and automatically reconnect the original call.

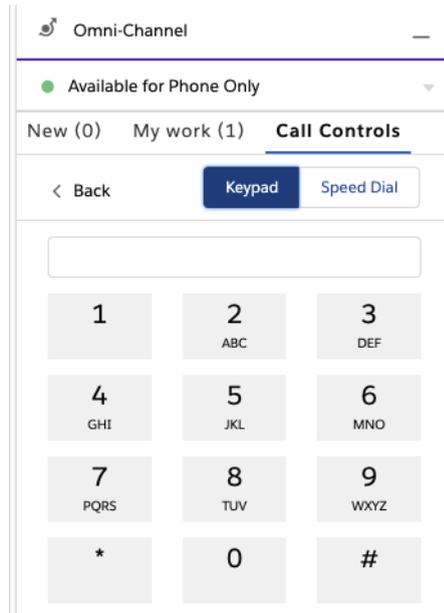
If you click on a **Natterbox user** will transfer to their **Natterbox extension**.

Clicking on a **non-Natterbox Salesforce user, Salesforce Contact** or **Salesforce Account** will transfer to the record's associated phone number.

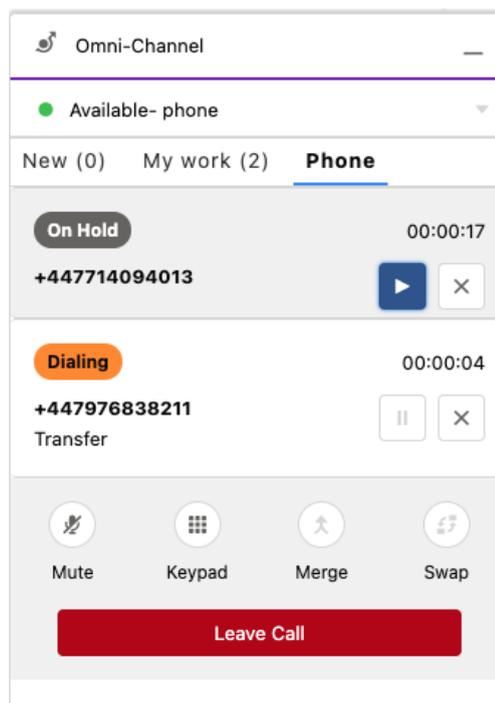
For a **non-Natterbox Salesforce user, Salesforce Contact** if a phone number is not set then their **mobile number** will be used instead.

If you would prefer to type the contact's number in directly, select **Keypad** and then:

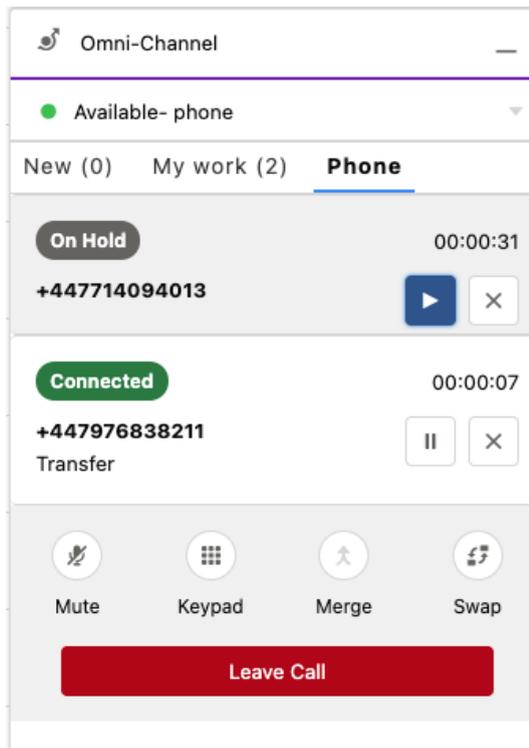
- Type in the number you wish to call directly on the keypad or
- Use your keyboard to tap the number into the dial field



Once the call has been initiated to the other participant, you will see the following screen, where the first participant will be automatically placed on hold:



Once the new participant answers the call, the screen changes to look like this:



If you wish to go into Conference mode (where all three participants can speak to and hear each other), click the **Merge** button.

Transfer Behaviour

The contact transfer integration works according to Salesforce’s design and as such there are some limitations to be aware of.³

Results limit

³ Please note that these are limitations with the way Salesforce has designed the transfer system and cannot be influenced by Natterbox.

When searching for a contact, a maximum of 50 results can be returned at one time.

How to re-search

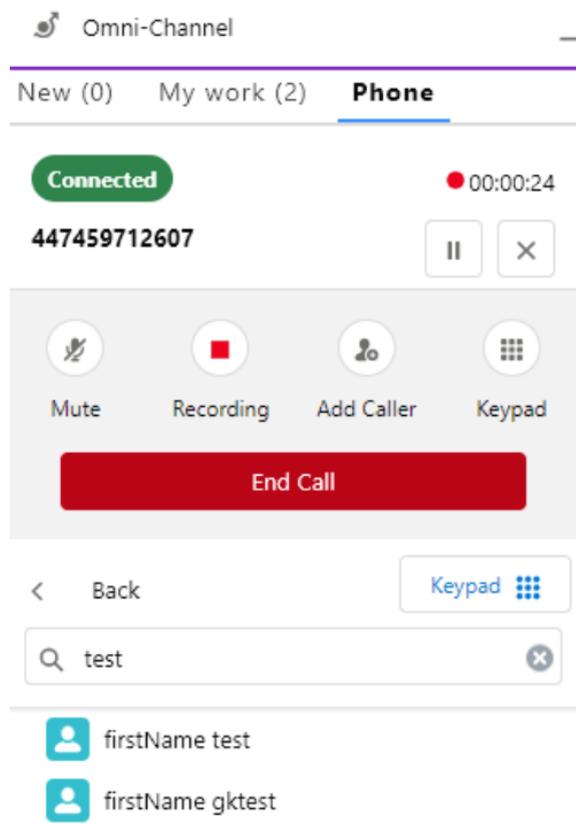
If a name is entered incorrectly, in order to correct your search result you will need to cancel out of the **Add Caller** dialog by clicking:

- **Back**
- **Add Caller**

before entering your search again . If you just delete what you have typed and try a new search, no results will be returned.

Add Caller option gets stuck on Dialer

If a call is ended while the **Add Caller** dialog is open, the **Add Caller** dialog - along with any search results - may remain on the dialer even when the user is no longer handling a call.



Unable to show full contact directory

It's not possible to show a list of all available contacts from the **Add Caller** dialog - instead you need to type at least the first three letters of the person's name to be able to start your search.

Agent Availability / Presence not available

You won't be able to view the Presence, Natterbox Availability or Omni-channel Availability of agents from the dialer.

General Address Book

There is no provision within Service Cloud Voice to make this address book available outside of call transfers.

Relating Voice Calls to leads

On receiving an inbound call, Service Cloud Voice will pop a Voice Call record, so if you wish to link a match to a Lead, you will need to create the following **Salesforce Flow**.

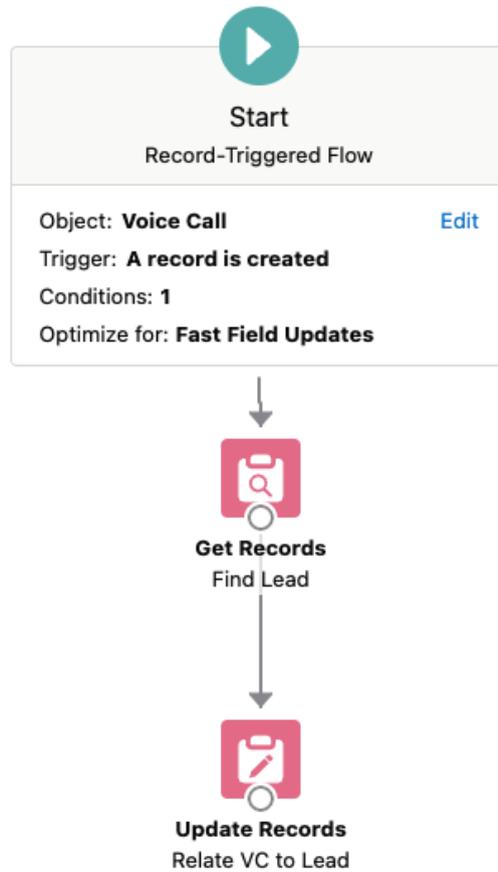
Note if you also want a new **Contact** to be created, make sure you also enable Channel-Object linking.

Further note, a Voice Call Object can be manually associated with **Contacts** by updating the related list link but it's not possible to do the same for **Accounts**, in which case a Salesforce Flow will be required in order to form the link.

Step 1:

Complete the details for **Record-Triggered Flow** as below:

- Object: **Voice Call**
- Trigger: **A record is created**
- Conditions: **1**
- Optimize for: **Fast Field Updates**



Step 2:

Complete the details for **Configure Start** as below:

- Object: **Voice Call**
- Trigger the Flow When: **A record is created**
- Condition Requirements: **All Conditions Are Met (AND)**
- Field: **CallType**
- Operator: **Equals**
- Value: **Inbound**
- Optimize the Flow for: **Fast Field Updates**
- Click **Done**

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Voice Call

Configure Trigger

* Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field	Operator	Value
CallType	Equals	Inbound

+ Add Condition

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Cancel

Done

Step 3:

Complete the details for **Edit Get Records** as below:

- Object: **Lead**
- Condition Requirements: **All Conditions Are Met (AND)**
- Field: **MobilePhone**
- Operator: **Equals**
- Value: **\$Record > Caller Number**
- Sort Lead Records: **Not Sorted**
- How Many Records to Store: **Only the first record**
- How to Store Record Data: **Automatically store all fields**
- Click **Done**

Edit Get Records

Find Salesforce records and store their field values in flow variables.

Find Lead (Find_Lead) 

Get Records of This Object

* Object

Filter Lead Records

Condition Requirements

Field	Operator	Value
MobilePhone	Equals	Aa \$Record > Caller Number X 

Sort Lead Records

Sort Order

 If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

- Only the first record
- All records

How to Store Record Data

- Automatically store all fields
- Choose fields and let Salesforce do the rest
- Choose fields and assign variables (advanced)

Step 4:

Complete the details for **Edit Update Records** as below:

- How to Find Records to Update and Set Their Values: **Use the voice call record that triggered the flow**
- Condition Requirements to Update Record: **None-Always Update Record**
- Field: **RelatedRecordId**
- Value: **Lead from Find_Lead > Lead ID**
- Click **Done**

Edit Update Records

Update Salesforce records using values from the flow.

Relate VC to Lead (Relate_VC_to_Lead) 

• **How to Find Records to Update and Set Their Values**

- Use the voice call record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

 Because this flow runs *before* a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow *after* the record is saved.

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▼

Set Field Values for the Voice Call Record

Field	Value
<input type="text" value="RelatedRecordId"/>	← <input type="text" value="Lead from Find_Lead > Lead ID"/> 
<input type="button" value="+ Add Field"/>	

Switching between devices

If a user has both a single configured Softphone (i.e. Webphone) and a single Deskphone (i.e OTT device) then the Service Cloud Voice dialler will display a settings option for managing your devices, like this:



Clicking this settings icon will take you to the following page:

 Omni-Channel
—

● Available for Calls
▼

 You have no active requests.
×

New (0)
My work (0)
Phone

<
Settings

Your Phone Type

Softphone

Desk Phone

* Phone Number

447410698484

Cancel

Save Changes

 Omni-Channel (Online)
 History

From here you will be able to select either **Softphone** or **Desk Phone** to switch between your two configured devices.

Press **Save Changes** to confirm this as your device from which to make and receive calls.

If a user has a **Desk Phone** device, you will notice an editable text field, though please **do not** modify this field as it will misconfigure the user.

Note if you have multiple **Desk phone** devices (eg OTT & MS Teams) or multiple **Softphone** devices (Yealink & Webphone) then these settings will not be accessible, though the Admin can instead update the user's **Monitored Device** in the **Natterbox User** page:

Edit Delete

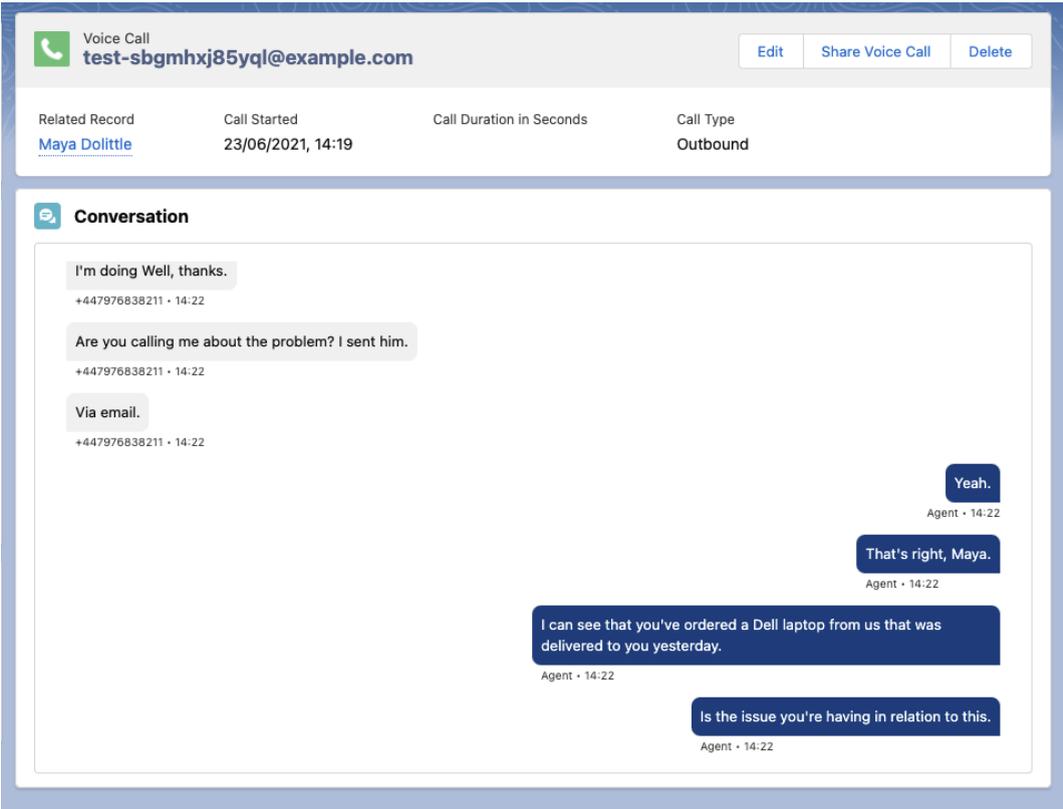
▼ Natterbox User Information

Email Address	dsadas@dasdasd.com.sandbox00d3o0000000pmdauu				
First Name	testy	Last Name	westy		
Mobile		Active	<input type="checkbox"/>		
User Extension	2005				
WebPhone Disabled	<input type="checkbox"/>	Availability Profile			
WebPhone Mode	Use Default	Availability State			
Track Outbound CTI Device	<input type="checkbox"/>	Monitored Device		12009 - Webphone	



Transcription

Your inbound and outbound Service Cloud Voice calls are transcribed in real time with the transcript appearing in your **Voice Call** tab. The customer's transcript is shown on the left while yours is shown on the right.



The screenshot displays a voice call interface with a header bar and a main conversation area. The header bar includes a phone icon, the text "Voice Call", and the email address "test-sbgmhxj85yql@example.com". To the right of the header are three buttons: "Edit", "Share Voice Call", and "Delete". Below the header is a table with four columns: "Related Record", "Call Started", "Call Duration in Seconds", and "Call Type". The table contains one row with the following data: "Maya Dolittle" (with a link), "23/06/2021, 14:19", and "Outbound". The main area is titled "Conversation" and shows a transcript of the call. The transcript consists of several messages: a customer message "I'm doing Well, thanks." (14:22), a customer message "Are you calling me about the problem? I sent him." (14:22), a customer message "Via email." (14:22), an agent response "Yeah." (14:22), an agent response "That's right, Maya." (14:22), an agent response "I can see that you've ordered a Dell laptop from us that was delivered to you yesterday." (14:22), and an agent response "Is the issue you're having in relation to this." (14:22).

Related Record	Call Started	Call Duration in Seconds	Call Type
Maya Dolittle	23/06/2021, 14:19		Outbound

Conversation

I'm doing Well, thanks.
+447976838211 • 14:22

Are you calling me about the problem? I sent him.
+447976838211 • 14:22

Via email.
+447976838211 • 14:22

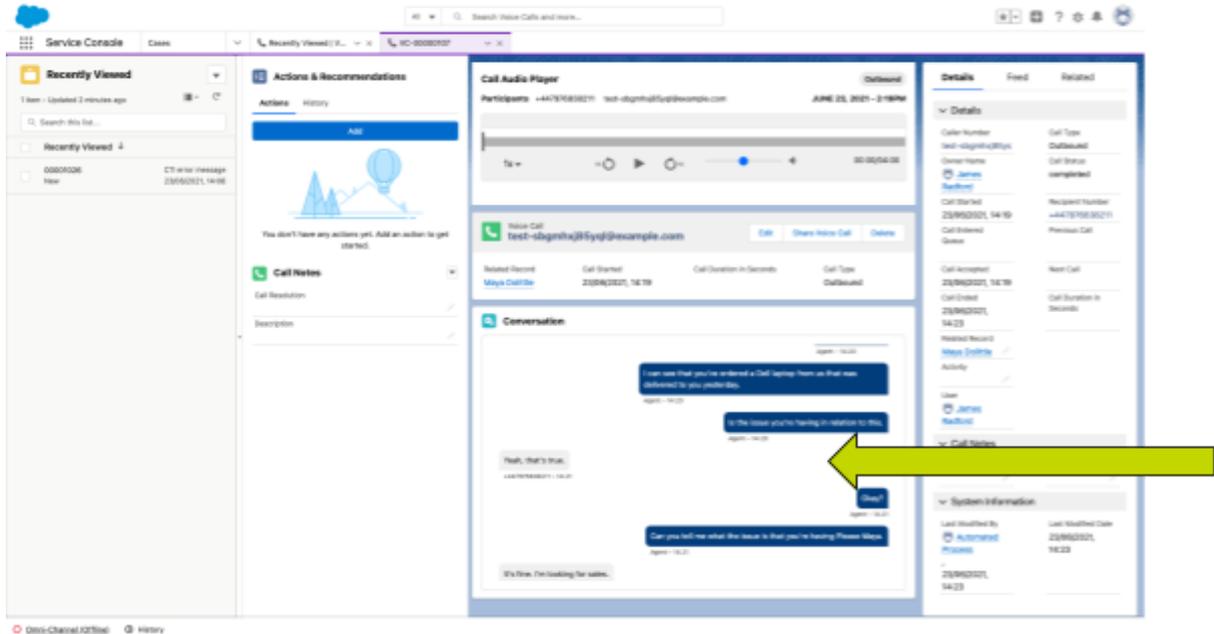
Yeah.
Agent • 14:22

That's right, Maya.
Agent • 14:22

I can see that you've ordered a Dell laptop from us that was delivered to you yesterday.
Agent • 14:22

Is the issue you're having in relation to this.
Agent • 14:22

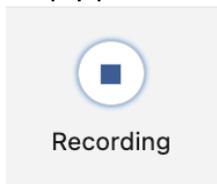
The transcript is also saved in the **Voice Call** object where it can be viewed at any time.



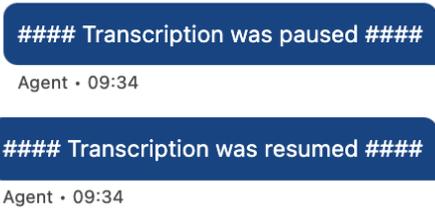
Pausing Transcription (and call recording)

Once the pause/resume call recording functionality has been correctly configured it will also be possible to pause the transcription using the same option.

Simply press the “Recording” button :



Both the call recording and the call transcription will be paused and a message will be sent into the agent’s conversation window to indicate this, then to resume just press it again.



Transcription and Call Transfer Behaviour

Note: If an agent transfers a call, the transcript will stop at the end of the first call leg⁴.

Voice Call Object Details

The Voice Call object also has the following details that relate to your call.

Caller Number: the phone number of the person who made the call.

Call Type: the types of call connections, for which the possible types are:

- Bridge
- Callback
- Coach
- Inbound
- Internal
- Outbound
- Transfer

Owner Name: the phone number of the user who owns the phone number

⁴ This is a known issue that Salesforce is working to resolve and this document will be updated to reflect the change once it is live

User: the phone number of the Service Cloud Voice user

Call Status: the status of a phone call. The following status values are possible:

- **New:** indicates that the Voice Call record has been created. An inbound call that is never accepted by an agent remains in this state
- **In-progress:** indicates that the call has been accepted (or, for outbound messages, initiated) by an agent
- **Transferred:** indicates that the agent has attempted to transfer the call. Another Voice Call record is created to track the state of the transferred call. This record remains in the transferred state until the call is completed. After the transferred call is completed, this Voice Call record enters the **completed** state
- **Completed:** indicates that the call has ended. If **After Conversation Work (ACW)** is enabled, that work begins after the call has completed

Call Started: the time and date when the call was connected

Call Accepted: the date and time when someone accepted the call

Call Ended: the time when a call ended

Recipient Number: the recipient's phone number

Call Entered Queue: name of the agent queue

Previous Call: Phone number of the previous call when a call was transferred from one agent to another

Next Call: Phone number of the next call when a call was transferred from one agent to another

Call Duration in Seconds: The total call duration in seconds

Related Record: The phone number of the related record

Activity: the ID of the related activity. Please note that it's currently not possible to create activities via Service Cloud Voice and that activities will need to be manually created and linked on the Voice Call object

*Please note that the Voice Call object is a Salesforce managed entity. If you require further call details please refer to the **Call Logs** from the Natterbox App*

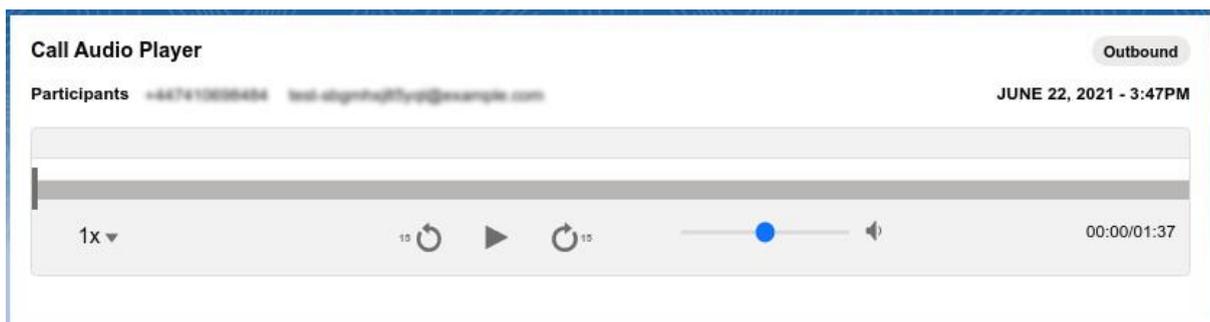
For more information on the Voice Call object please [refer to this Salesforce API documentation](#)

How are Voice Call Objects related to a Natterbox Call Reporting Object?

The Voice Call Object and the Call Reporting Object are not directly linked with an object lookup; the **VendorCallKey** field on the Voice Call Object will match either the CRO's **To UUID** or **From UUID** depending on if it's inbound or outbound.

Call Recording

When a call has been completed the Voice Call object will be populated with the associated call recording which can be played from Salesforce's audio player.

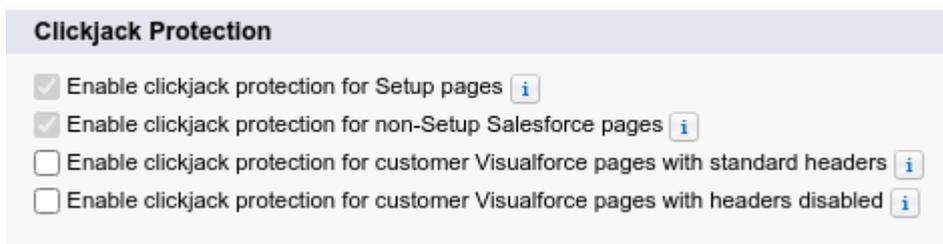


Troubleshooting

Why does the Webphone not launch / the keypad is disabled

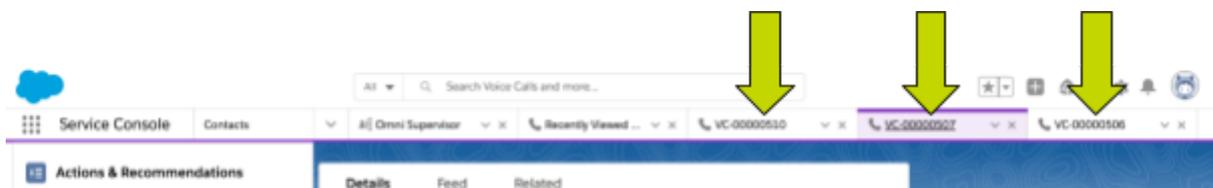
If the Service Cloud Voice dialler appears with an error message that reads “**We couldn’t sign you in to the telephone provider**” please ensure that “clickjack protection” has been disabled within the organisation for visualforce pages.

Navigate to **Setup > Session Settings** then uncheck the option “Enable click protection for customer Visualforce pages with **headers disabled**”, before pressing **Save** :



Why am I not receiving any calls?

1. Please ensure all Voice Call tabs have been closed as any that are open will block further inbound calls (unless you have **After Conversation Work** enabled in Salesforce (see 2nd **Service Channels** screenshot below)



Service Channels

Route work from a Salesforce object, such as cases, chats, leads, or even custom objects, to support agents.

Save **Cancel**

Basic Information

Service Channel Name

Developer Name

Salesforce Object

Custom Console Footer Component

Minimize the Omni-Channel widget when work is accepted

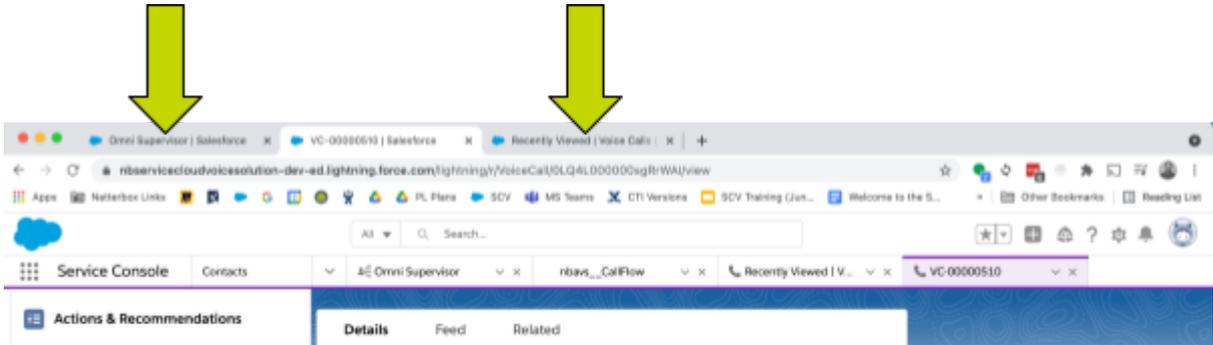
After Conversation Work Time (Beta)

Give agents wrap-up time after conversations 

Max Time (seconds)

Save **Cancel**

2. You can only have one Salesforce console window open at a time to be able to make and receive calls. In this example below you will need to close two of the windows:



Why is Salesforce Omni-Channel Presence not synced with Natterbox Availability

Calls should only ever get sent to users who are ready and available for calls, this is done by agents setting themselves to available from the Omni-Channel and then Natterbox syncs their status using the Natterbox Availability system.

If a user's Availability state does not match their Presence in Omni-Channel it may be because the agent is NOT assigned to the **contact center**.

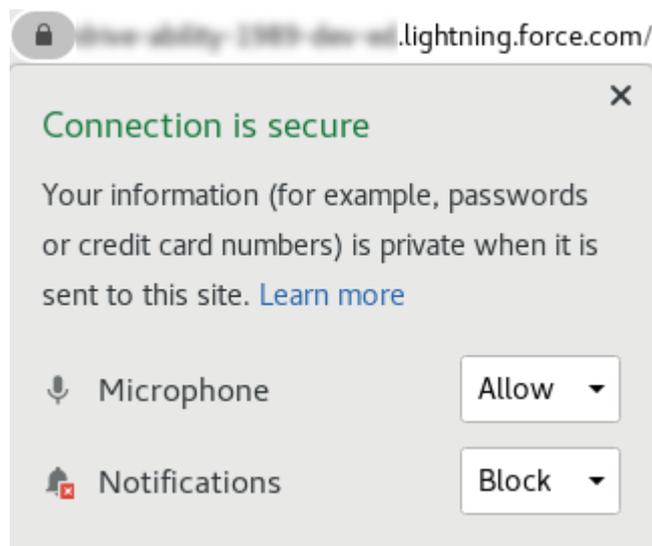
Please ensure any affected users are NOT assigned the CTI or Freedom licence within the AVS App.

Re-enabling the licenses for the users should re-assign all the required configurations appropriately so for all affected users :

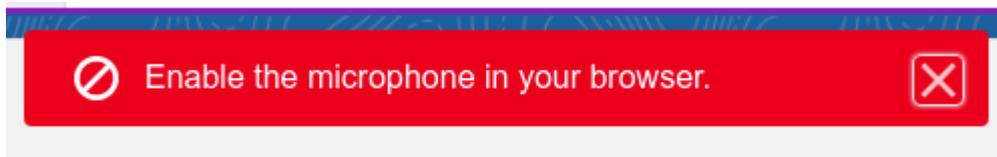
1. Uncheck their SCV license in the AVS App
2. Save
3. Re-enable the SCV license
4. Save
5. Retest

Why can't the other party hear me?

Ensure you have allowed Salesforce access to your microphone.



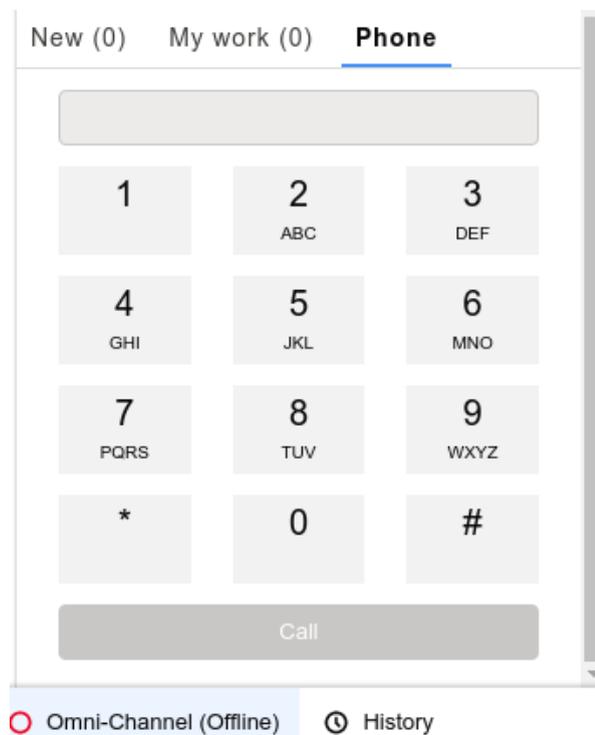
You may also notice this Salesforce error when loading a page if you haven't allowed access to your microphone:



Why can't I make calls?

1. Ensure you have already chosen the appropriate **Availability status** to enable you to make (and receive) calls

If you haven't done so, you'll see that your keypad is greyed out and you'll get a no entry symbol when you try to enter numbers into the dial field



2. Check that your user is a member of the **Natterbox Contact Center**

- a. Navigate to Setup > Partner Telephony Contact Centers > Natterbox Contact Center then look for your user under **Contact Center Users**

Contact Center Users Q Search...

<input type="checkbox"/>	FULL NAME	EMAIL	PERMISSION SETS	USER PROFILE
<input type="checkbox"/>	Service Webpage	service.webpage@natterbox.com	Contact Center Admin (Partner Tele...	System Administrator

- b. If your user is not a member, in the Natterbox App remove the Service Cloud Voice licence from that user, save, then re-add the licence and save again
- c. Confirm the user is now a member of the Natterbox Contact Center - the Service Cloud Voice dialler should now be operational

3. Check that your user has their monitored device correctly set

- a. Navigate to your user from the **Natterbox App** by going to **Natterbox Users**
- b. Click on your user
- c. Check under the **Monitored Device** section that your user’s device is correctly set
 - i. If it’s not the device you expect, click the dropdown, select the appropriate device and hit **Save Monitored Device**

▼ Natterbox User Information			
Email Address	dsadas@dsdasd.com_sandbox00d3q0000000omduau		
First Name	testy	Last Name	westy
Mobile		Active	<input type="checkbox"/>
User Extension	2005		
WebPhone Disabled	<input type="checkbox"/>	Availability Profile	
WebPhone Mode	Use Default	Availability State	
Track Outbound CTI Device	<input type="checkbox"/>	Monitored Device	12009 - Webphone



Monitored Device 12009 - Webphone

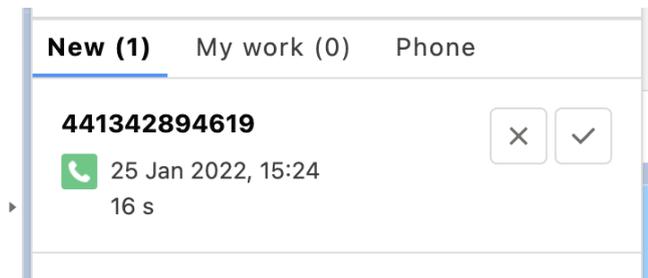
Why can't anyone make or receive any calls?

In the event the Salesforce Domain name is changed the Salesforce Cloud Voice settings become out of sync. You will need to contact Natterbox to have the Domain name updated on the platform.

Why can't I reject calls?

Calls are handled via Salesforce Omni-Channel hence in order to reject a call an agent needs to be able to reject a work item. Check the option “**Allow Agents to Decline Requests**” has been enabled under the Omni-Channel settings- [see step 4 here](#)

Once this option is enabled, the decline icon should appear on the Omni-Channel :



Why can't I view the live transcription of my call?

Check that the **Conversation Body** component has been added to the Salesforce **Voice Call Record** - [see step 7 here](#)

Why can't I view my call recordings?

Check that the **Call Recording Player** component has been added to the Salesforce **Voice Call Record** - [see step 7 here](#)

Why can't I play back my call recordings?

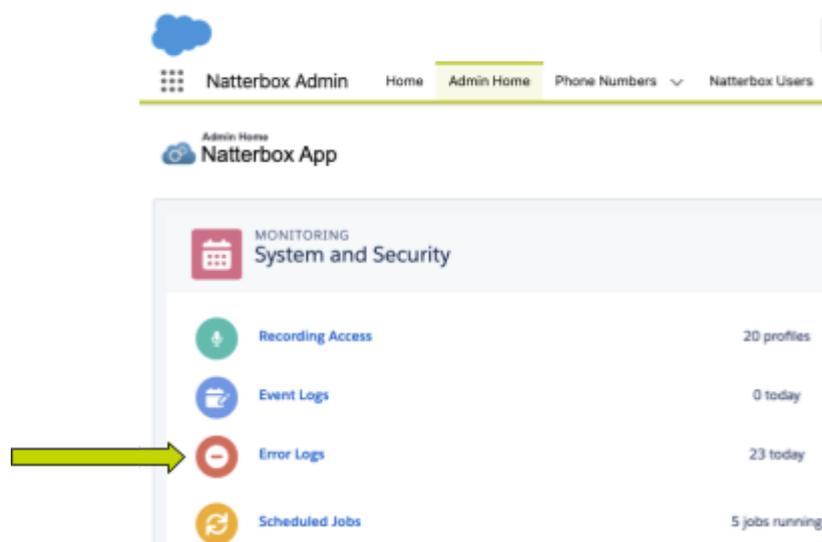
Check that your user has access to your call recordings -this can be done by enabling all users to access their own recordings from the **Account Settings** in the Natterbox App or by creating a new **Recording Policy**, from the **Admin Home page**.

Service Errors

Service Cloud Voice service errors will be logged to the errors logs section of the Natterbox App.

From the **Natterbox App**, navigate to:

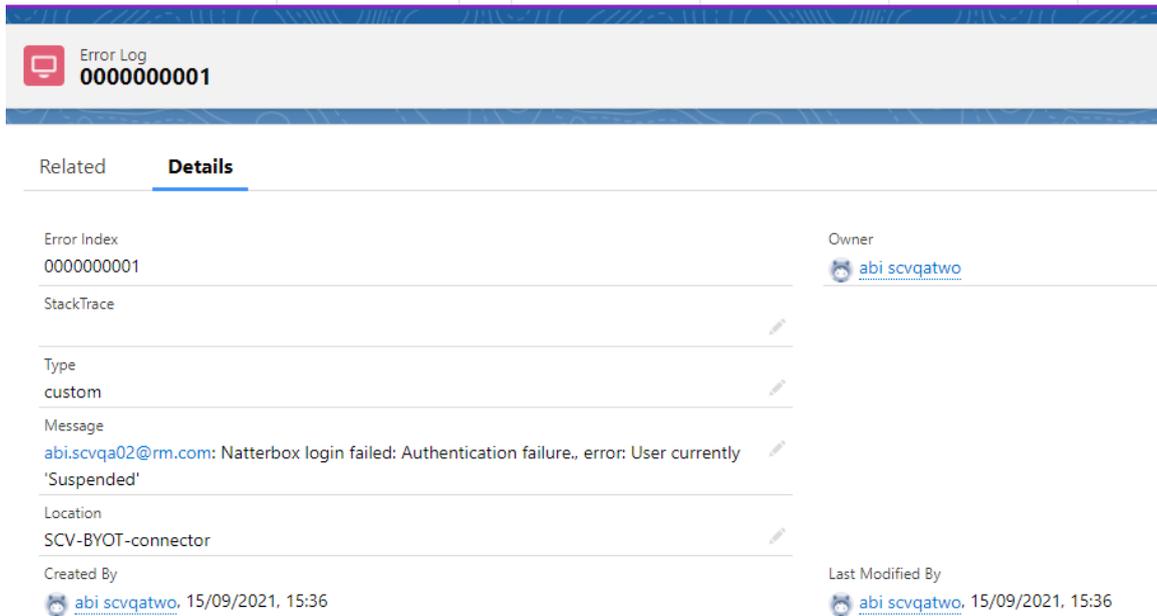
- > **Admin Home** page
- > **Error Logs**



From here you can search for users who are experiencing any service issues with Service Cloud Voice.

Authentication errors

If there is an error associated with a user that contains the message “**Authentication failure**”, this would result in Service Cloud Voice not loading and the webphone not appearing.

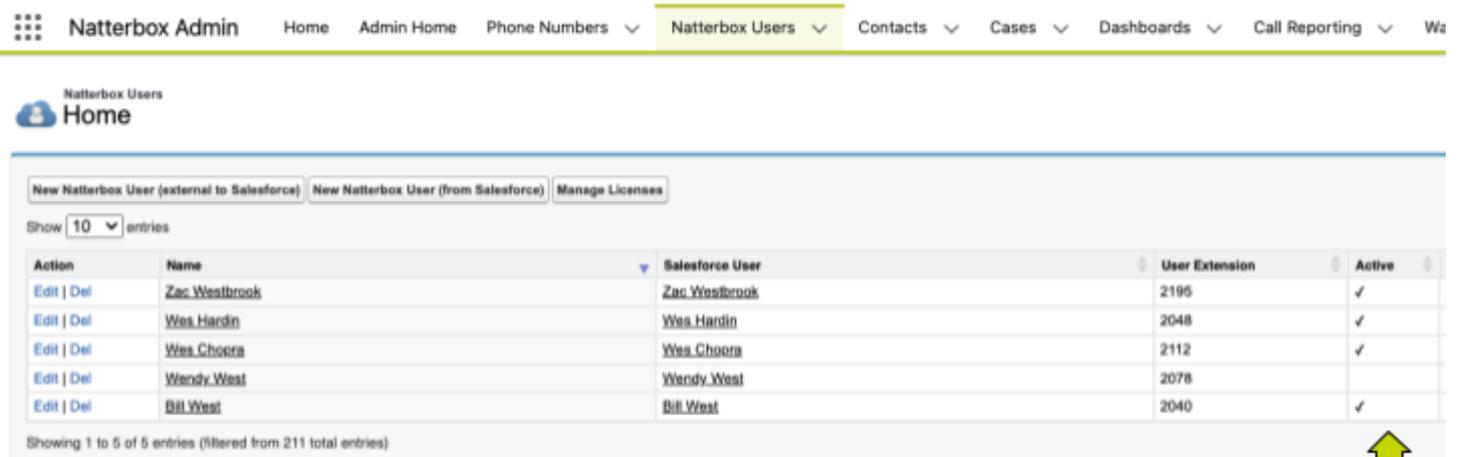


Error Log
0000000001

Related **Details**

Error Index	0000000001	Owner	 abi.scvqatwo
StackTrace			
Type	custom		
Message	abi.scvqa02@rm.com: Natterbox login failed: Authentication failure., error: User currently 'Suspended'		
Location	SCV-BYOT-connector		
Created By	 abi.scvqatwo , 15/09/2021, 15:36	Last Modified By	 abi.scvqatwo , 15/09/2021, 15:36

The most likely reason for this happening would be that the user is not Active. To check this, go to the **Natterbox Users** page to ensure that the user is **Active**:



Natterbox Admin | Home | Admin Home | Phone Numbers | **Natterbox Users** | Contacts | Cases | Dashboards | Call Reporting | Wa

Natterbox Users Home

New Natterbox User (external to Salesforce) | New Natterbox User (from Salesforce) | Manage Licenses

Show 10 entries

Action	Name	Salesforce User	User Extension	Active
Edit Del	Zac Westbrook	Zac Westbrook	2195	✓
Edit Del	Wes Hardin	Wes Hardin	2048	✓
Edit Del	Wes Choera	Wes Choera	2112	✓
Edit Del	Wendy West	Wendy West	2078	
Edit Del	Bill West	Bill West	2040	✓

Showing 1 to 5 of 5 entries (filtered from 211 total entries)

Configuration errors

If there is an error associated with a user that contains the message “**No devices available**”, this would result in Service Cloud Voice not loading and the webphone not appearing as it is not detected.

 Error Log
0000000004

Related **Details**

Error Index	0000000004	Owner	 abi scvqatwo
StackTrace			
Type	custom		
Message	abi.scvqa02@rm.com : Natterbox login failed: No devices available., error: no registered devices or associated numbers found 		
Location	SCV-BYOT-connector		
Created By	 abi scvqatwo , 08/10/2021, 15:49	Last Modified By	 abi scvqatwo , 08/10/2021, 15:49

Check the user's device configuration:

- > **Natterbox Users**
- > **Natterbox User Information**
- > **Monitored Device** - ensure a device is set as shown below:

▼ **Natterbox User Information**

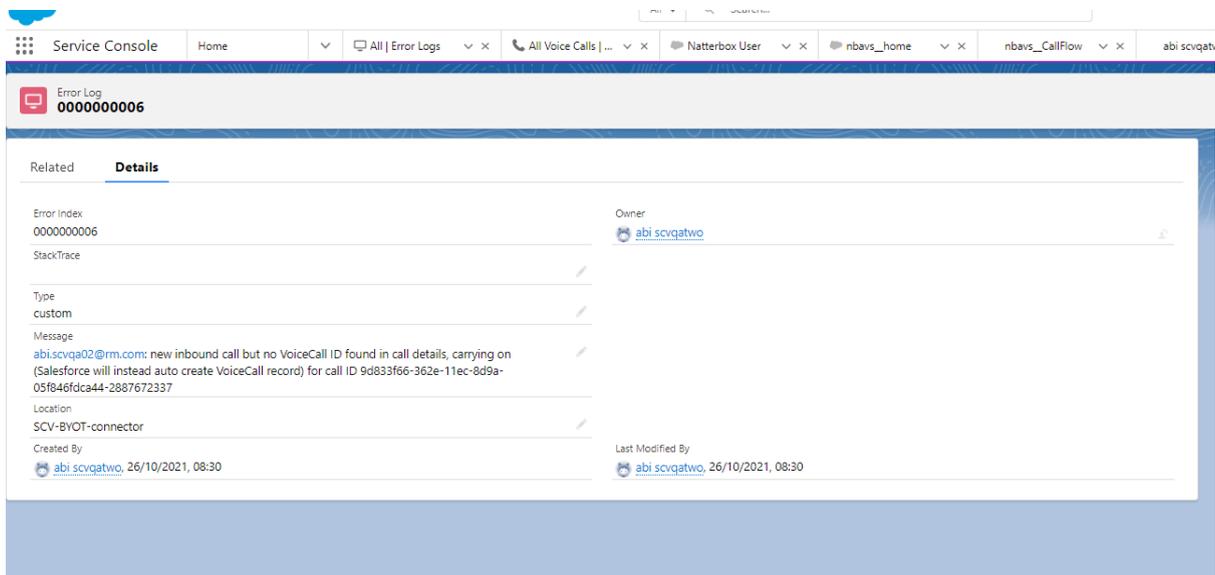
Email Address	dsadas@dasdasd.com_sandbox00d3g0000000rmduau	Last Name	westy
First Name	testy	Active	<input type="checkbox"/>
Mobile			
User Extension	2005		
WebPhone Disabled	<input type="checkbox"/>	Availability Profile	
WebPhone Mode	Use Default	Availability State	
Track Outbound CTI Device	<input type="checkbox"/>	Monitored Device	12009 - Webphone



Monitored Device 12009 - Webphone

Voice call object errors

If there is an error associated with a user that reads “**No VoiceCall ID found**”, this indicates the Salesforce Voice Call object was not successfully created as part of a Service Cloud Voice call. This means the call may have failed to establish and the transcript will not have been saved. Copy and paste **Message** and Date (shown in **Created By** here) from the error log and contact support@natterbox.com for further diagnosis.



Call operation errors

If there is an error associated with a user that reads “**X failed for [device ID]**” with X being a call operation, it indicates that particular operation failed for the user at some point in a call.

The call operation failure messages are:

- **Dial failed** : An outbound call has failed to establish
- **Answer failed** : An inbound call has failed to establish
- **Hold failed** : Placing a customer on hold has failed
- **UnHold failed** : Taking a customer off hold has failed

- **Attended transfer dial failed** : Initiating an attended transfer has failed
- **Attended transfer swap failed** : Switching between calls during an attended transfer has failed
- **Attended transfer merge** : Combining calls into a single during an attended transfer has failed
- **Attended transfer complete failed** : Completing an attended transfer has failed
- **Attended transfer abort failed** : Cancelling the initiation of an attended transfer has failed
- **Blind transfer failed** : Completing a blind transfer has failed
- **Hangup failed** : Terminating a call has failed

There can be various reasons why a particular operation failed, so please copy and paste the **Message** and Date (shown in **Created By** here) fields from the error log and contact support@natterbox.com for further diagnosis.

 Error Log
000000007

Related **Details**

Error Index
000000007

StackTrace

Type
custom

Message
abi.scvqa02@rm.com: Natterbox error: Dial failed to number '447459712607'

Location
SCV-BYOT-connector

Created By
 [abi.scvqatwo](#), 27/10/2021, 12:27

Owner
 [abi.scvqatwo](#)

Last Modified By
 [abi.scvqatwo](#), 27/10/2021, 12:27