The Right Technology, the Right Results

Promero Could Call Center CTI Integration to Oracle Service Cloud

User Guide

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ORACLE Gold Partner

promero

This guide will assist new users on the use of Oracle Service Cloud CTI.

Document Modification Log	
V 1.0	Initial Draft

An **FYI NOTE** provides additional, helpful information. This information may tell you how to do a certain task or just be a reminder for how-to's given in previous sections

A **WARNING MESSAGE** provides information about how to avoid harm to your system

A **CAUTION** provides information about how to avoid malfunction or unwanted behavior

Table of Contents

Prerequisites

In order to use the Promero Could Call Center CTI Integration to Oracle Service Cloud, a valid Promero Cloud Call Center account will be needed. Please see the Promero Could Call Center CTI integration Deployment guide for details.

Logging Into Oracle Service Cloud

(Figure 1)

1. Log into Service Cloud

    a. Enter your *User Name*
    b. Enter Your *Password*
    c. Click > *Login*

Logging Into the Media Bar

2. Once logged into Oracle Service Cloud, the Media Bar will be displayed.
Note: if you do not see the Media bar please contact your Administrator.
3. Click the login icon below to log into Promero Cloud Call Center as shown below:

Figure 2

        a. Enter your company *Alias*
        b. Enter you *Username*
        c. Enter your *Password*
        d. Click > *Login*

(Figure 3)

4. Once you successfully log into Media Bar, you will notice that the login icon will turn green to let the user know that there connected to Promero Cloud Call Center

(Figure 4)

Agent Telephone Configuration

F.Y.I. The phone used by work with Oracle Service Cloud CTI adapter is the same phone that is configured for use by the Promero Cloud Call Center user accounts. This can be changed using the Configure option in the softphone.

If you work from multiple locations (such as from the contact center, from your home, and from a different office location), then you must configure your telephone settings each time that you change locations.

You can access the contact center from a variety of locations. To receive calls at your present location, select the type of phone system your company uses to route calls, and then enter your personal extension number for that system. You will not need to change these settings again as long you do not access the contact center from any other location. However, if you work from multiple locations (such as from the contact center, from your home, or from a different office location), you must configure Interaction Manager each time that you change locations.

Configuring Your Phone Number

After you have logged into the Media Bar and the Promero Cloud Call Center:

1. Click on the Configure button Configure Icon inside the Media Bar CTI window as shown below:

(Figure 4)

2. Select what type of phone you will be using PBX (VoIP) or Outside Line (regular telephone, Mobile, etc.):

(Figure 5)

(NOTE the agent telephone number cannot contain spaces, dashes or parenthesis)

3. Click > *"Set"* to save

Agent Status

This section explains the importance of your status and how and when to change your status.

(NOTE: Always refer to your Agent Status to monitor your status, so that you're available to receive interactions.)

(Figure 6)

(CAUTION: Interaction Manager will not send you any more interactions until you manually change your status back to Available).

Controlling Status

You can control your status and your availability for accepting or refusing incoming interactions. For example, if you want to leave your station for lunch, a break, or if you need time after a recently concluded interaction, you can make yourself temporarily unavailable for new interactions *(On Break).* Generally, your status automatically returns to *Available* when you finish an interaction. However, sometimes you might want to manually *Select > Available* to change your status.

By selecting different statuses, you can control your work load in the following ways:

Available. *Select > Available* to let Interaction Manager know that you are ready to receive a new interaction.

On Break. *Select > On Break* to tell Interaction Manager not to give you any more calls *(For example, if you want to leave your station for lunch, a break*

This section of explains the basic phone interactions (such as receiving calls, transferring calls, placing a caller on hold, ending a call, and so on). This chapter includes the following topics:

- ✓ Placing Calls
- ✓ Ending a Call
- ✓ Predictive Dialing
- ✓ Accepting Calls
- ✓ Placing a Caller on Hold
- ✓ Call Transfers
- ✓ Conference Calls
- ✓ Inbound Call No Incident
- ✓ Inbound Call New Incident
- ✓ Inbound Call Existing Incident
- ✓ Outbound Call Existing Incident

You can make and receive two basic types of phone calls:

Automatic Call Distributor (ACD) Calls. This type of call occurs when a person dials a number associated with your contact center, and the call is routed to you. ACD calls include:

- A customer who calls and is routed to your phone
- Predictive Calls

Non-ACD Calls. This type of call occurs when the person is making a direct call to your phone number. Non-ACD calls include:

- Direct Inbound Calls: calls that come from outside the company directly to your phone

- Direct Outbound Calls: calls that you make to numbers outside the company.

Outbound Calls

1. Click the Dial Pad Icon:

(Figure 7)

2. Once the Dial Pad is open, please Dial in the number you would like to call within the "Texted Field Box":
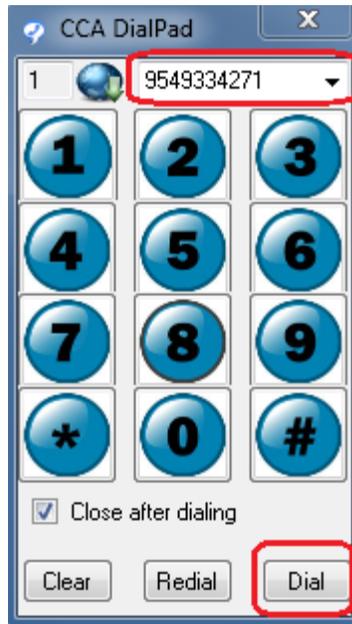
(Figure 8)

3. Then Click > *Dial* to place the call

 (NOTE: *telephone number cannot contain spaces, dashes or parenthesis)*

Predictive Dialing

In **Predictive Calling**, potential customers are called and offered new products and services.

In **Predictive Calling**, the system automatically dials a series of phone numbers of existing customers or potential customers. If a customer answers the phone, the system routes the customer to an available Agent who usually reads a prepared script. The most common use for Predictive Calling is to offer products and services to new or existing customers.

Predictive dialing is accomplished by the Agent clicking the *Login Predictive* button. The agent's telephone will ring, once the Agent takes their phone off hook and remains off hook, the Agent will then begin to receive Predictive Calls.

1. Click the Predictive Icon to log into Predictive Dialer mode, your phone will ring. Answer the phone and do not hang up.

(Figure 9)

2. Once the agent checks the box for Predictive Calling, the agent begins receiving Predictive calls. Showing the First Name, Last Name and phone number of the lead being dialed.

(NOTE: If multiple leads have the same phone number, the names of all leads that have that number will be shown allowing the Agent to choose the correct lead)

3. To logout of Predictive Dialing, just click the Predictive Icon to disconnect from the server, then hang up your phone.

(Figure 10)

Inbound Phone Calls

The Promero Cloud Call Center notifies an Agent of an inbound call by displaying:

1. That there is an incoming call
2. *The Caller ID of that incoming call*
3. *Any Contact associated with the Caller ID of the incoming call*

(Figure 11)

For the agent to accept the incoming call, the agent would need to take their phone off hook by answering their phone (Softphone / External Phone)

(NOTE: If multiple Contacts have the same phone number, the names of all Contacts that have that number will be shown allowing the Agent to choose the correct Contact.)
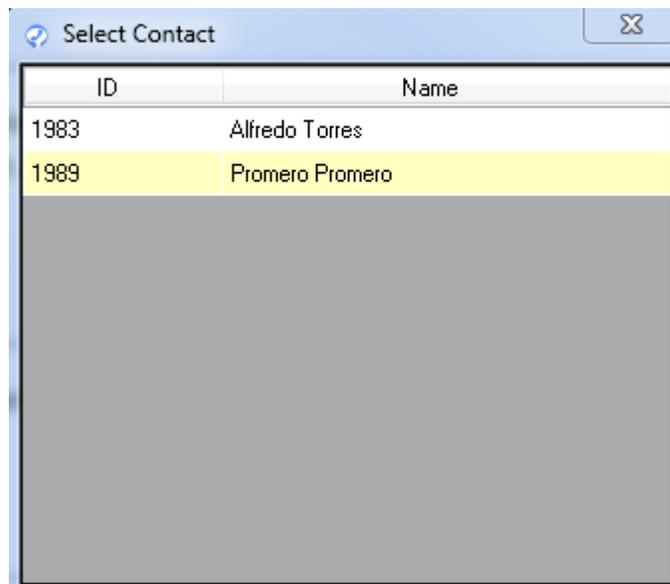
(Figure 12)

Placing Calls On-Hold

Complete the steps in the following procedure to place a caller on hold.

1. *Click the **Hold** Icon*

(Figure 13)

Removing Calls from Hold

When a call is on hold, click the hold button again to retrieve the caller from hold:

(Figure 14)

Transferring Calls

There are three ways to transfer calls directly from you to someone else. The three transfer types are the following:

Direct Transfer - Transfer an active call directly from you to someone else, which is sometimes called a blind transfer or cold transfer.

Supervised Transfer - Use a supervised transfer to speak to the person who is to receive the transferred active call without the caller hearing you. In this way, you can provide the caller's name and other useful information.

Warm Transfer - Use a warm transfer to conference everyone, including you, the active caller, and the person to whom you are transferring the call (such as Agent 2). In this way, you can stay on the line as long as necessary. In addition, you can click the Leave button to remove yourself from the conference, and let the caller and Agent 2 continue talking.

1. Click > *"Transfer Icon"*

(Figure 15)

2. Type the number that you would like to transfer the call to and select the type of transfer you would like to perform

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3. Then Click > *"Proceed"*

(Figure 16)

Conference Calls

This section explains how to create and join a conference call. Conference calls allow several people to communicate simultaneously. Each user is allowed to create a conference. The number of members is limited by the system configuration to three parties in total.

(CAUTION: Before you can create a conference, you must have at least one Active interaction.)

1. Click > **"Conference Icon"**

(Figure 17)

2. Type the *Telephone Number* to the Conference
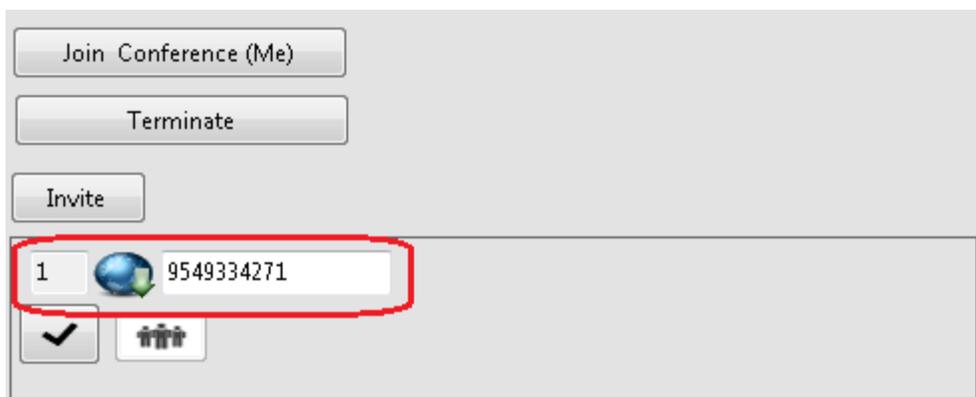
(Figure 18)

3. Click > **"Call"** to connect to 3rd caller

4. Once connected to 2rd caller, Click > **"Conference All Icon"** to connect all parties into one conference call

(Figure 19)

Ending a Conference

1. Click > "*Terminate"*

(Figure 20)

2. Then Click > *"Hang Up Icon"* to End Conference Call

(Figure 21)

Promero Cloud Call Center supports four call types, to display screen pops within Oracle Service Cloud CTI:

1. **Inbound Call No Incident** – This call type will attempt to match the ANI (Caller ID) with an existing Contact in Oracle Service Cloud. If a matching Contact is found it will be displayed. If more than one Contact matches the callers ANI, a list will be displayed. If no Contacts exist no screen pop will be shown.

2. **Inbound Call New Incident** – The system will attempt to match the ANI (Caller ID) and display the Contact and create a new Incident for the Contact.

3. **Inbound Call Existing Incident** – This call type will utilize the Incident ID entered by the caller in an IVR. The Incident ID will be looked up and displayed to the agent in Oracle Service Cloud. If a matching Incident is not found, the screen pop from call type #1 (Inbound Call No Incident) will occur.

4. **Outbound Call Existing Contact** – This call type will attempt to match the DNIS (Dialed number) with an existing Contact in Oracle Service Cloud. If a matching Contact is found, it will be displayed. If more than one Contact matches the callers DNIS, a list will be displayed. If no Contacts exist no screen pop will be shown.

(NOTE: The following section outlines the scree pops that are shown to users, and are customizable by the Oracle Service Cloud Administrator.)

Inbound Call No Incident

When an inbound call comes through Promero Cloud Call Center, it will attempt to match the ANI of the inbound call, but if not ANI matches the call. Oracle Service Cloud will display no screen pop.
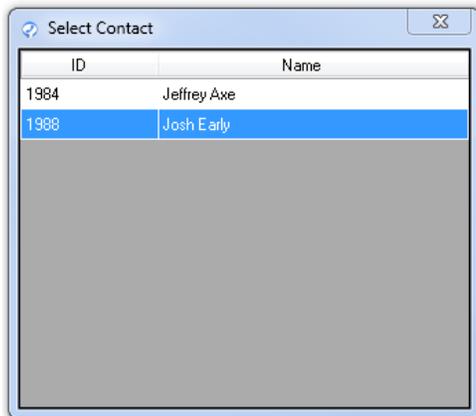
(Figure 22)

The agent then will then select the correct Contact and verify with the Contact, once connected.
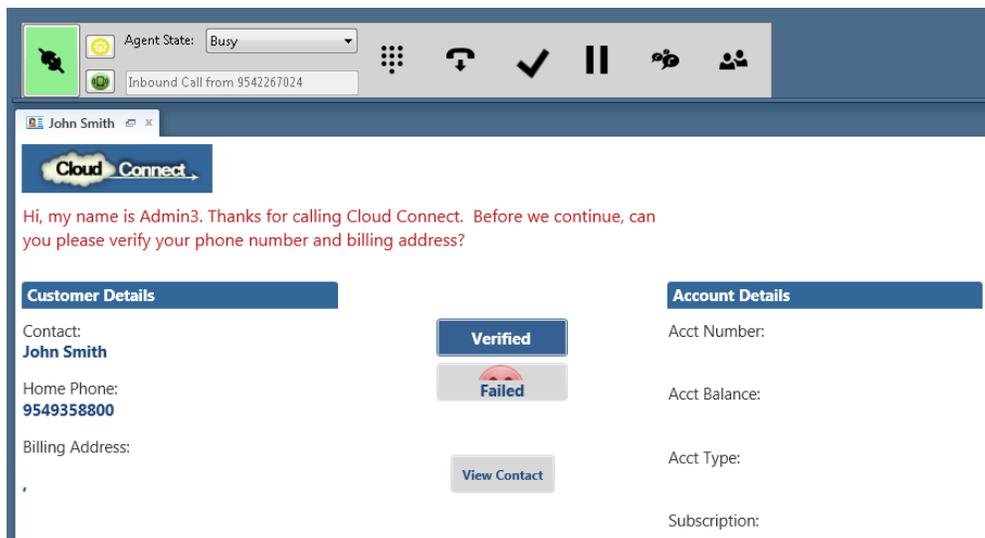
(Figure 23)

(NOTE: Please see Oracle Service Cloud CTI for any information and or documentations on how to create a new Contact and Editing existing Contact. https://docs.oracle.com/cloud/latest/servicecs_gs/docs.htm*)*

Inbound Call New Incident

When an inbound call arrives and existing Contact exists within Oracle Service Cloud CTI, the following screen pop would appear showing the agent the caller/customers Contact information.
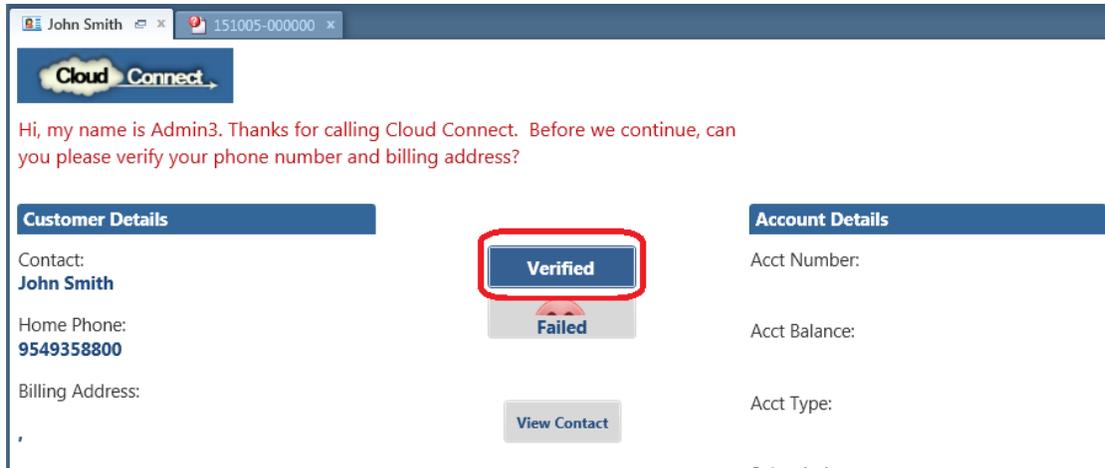
(Figure 24)

The agent will then have to verify the phone number and billing address before creating a new incident for this existing Contact. Once the agent has verified the information, the agent would be able to edit and save the new incident and all notes about the call.
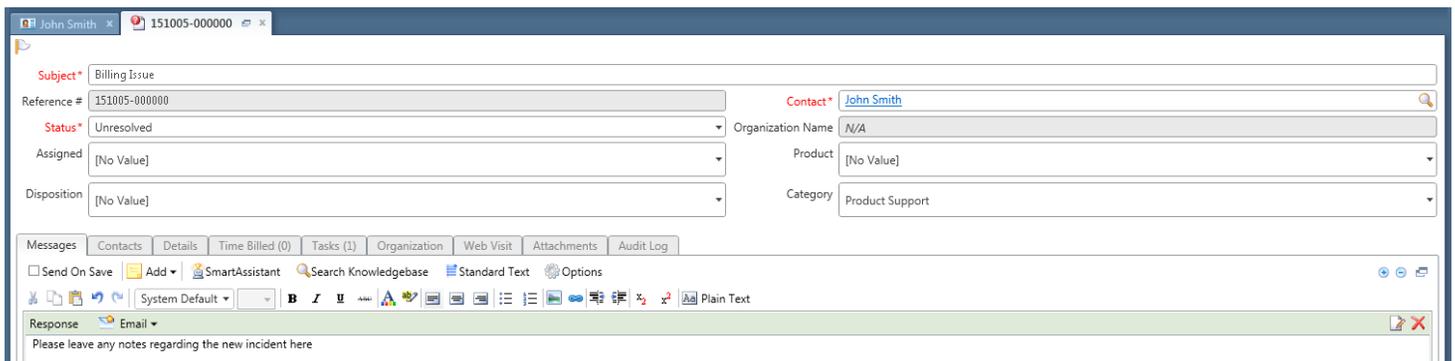
(Figure 25)

When the call is over, please click **"Save and Close"** .

(Figure 26)

Inbound Call Existing Incident

When a caller/customer calls into Promero Cloud Call Center and already has an existing incident open. A screen pop of the open incident would appear on the agent's screen with all past notes and comments.
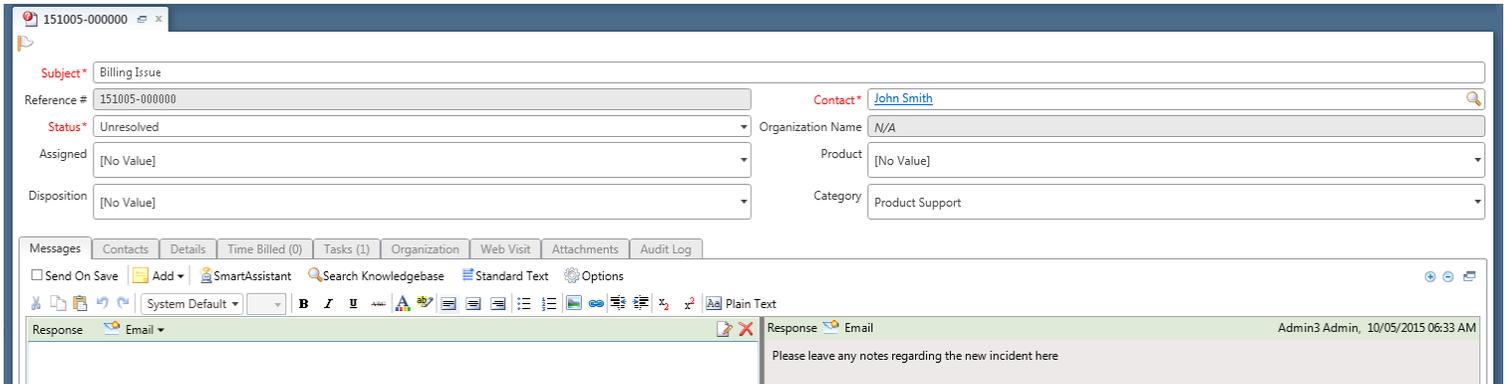
(Figure 27)

Once the agent has completed the call and updated the existing incident, please click *"Save and Close"* .
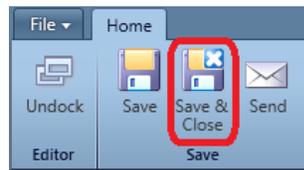
(Figure 28)

Outbound Call Existing Contact

When placing an outbound call, Oracle Service Cloud will attempt to match the DNIS (Dialed number) with an existing Contact in Oracle Service Cloud.

(Figure 29)

The agent then will then select the correct Contact and verify with the Contact, once connected.
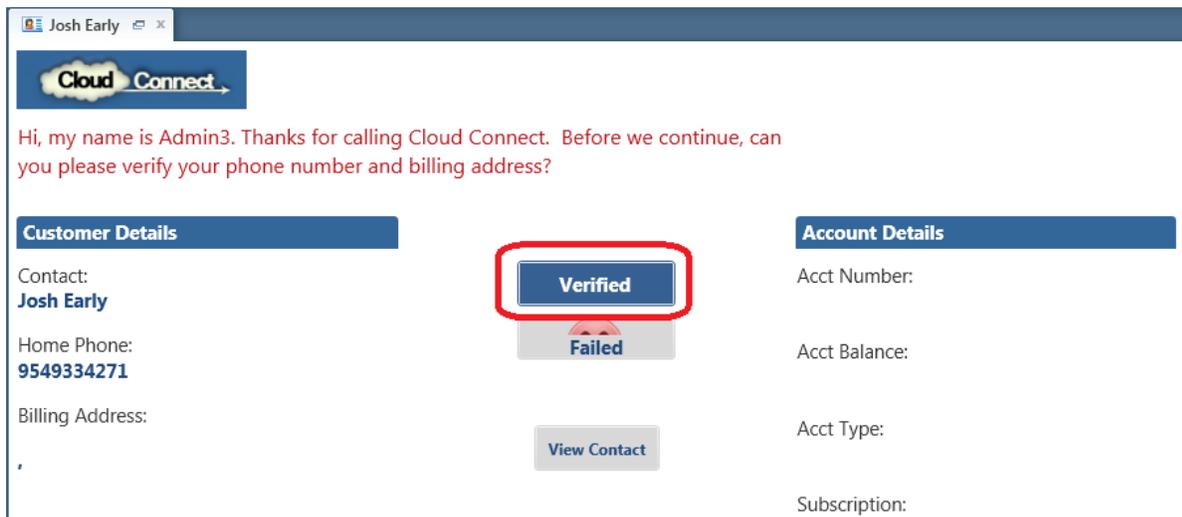
(Figure 30)

When the agent has completed the call, please click *"Save and Close"* .
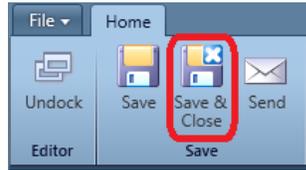
(Figure 31)

(NOTE: Please see Oracle Service Cloud for any information and or documentations. https://docs.oracle.com/cloud/latest/servicecs_gs/docs.htm*)*

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