Agent Activities in Cisco Webex Contact Center for Salesforce

Receive an Inbound Call in Cisco Webex Contact Center for Salesforce

To receive an inbound call:

Procedure

Step 1 In Salesforce, click the **App Launcher** menu and select **Webex Contact Center** App.

Step 2 Click the **Phone** button (on the bottom left) and sign in to the client.

Step 3 In the client screen, change the status to **Available** to receive calls.

Step 4 When there is an incoming call, the client finds the Automatic Number Identification (ANI) number in the record to see if the customer already exists.

- If the record is found and screen pop is configured, then customer details are displayed in a pop-up screen.

- If the record is not found, then a New Contact profile screen pop appears where you can enter the details.

Note To set up the screen pop, see Create a Default Softphone Layout.

Step 5 After the call is disconnected, select a wrap-up reason from the drop-down list.

An activity is logged against the respective Salesforce contact.

To see the activity log, click any entry in the Activity list. The following details appear:

Table 1: Call Activity Log

Parameter	Description
Assigned To	Shows the name of the agent who answered the call.
Subject	Shows type of the call, date, and timestamp.
Contact Type	Shows the contact type.
Ani	Shows caller's number.
Call Duration	Shows call duration in seconds.
Queue Name	Shows the queue name.
Due Date	Shows the follow-up date.
Priority	Shows the priority, such as High, Normal, or Low.
Created By	Shows the agent who has created the record.
Status	Shows the status of the call entry.
Call Object Identifier	Shows object ID used to track the call.
Call Type	Shows the call type.
Dnis	Shows the Agent's phone number.
Call Result	Shows the wrap-up option that is used, such as Follow-up, Default, or custom defined option.
Name	Shows the customer name.
Related To	Shows the related case with this activity.
Last Modified By	Shows the Agent who modified the task.
Comments	Shows Agent comments.

To play a recording, select an activity in the contact page and click **Play Recording**.

Note   If you have issues playing the recording, follow the steps in Set up Call Recording in Cisco Webex Contact Center for Salesforce.

Place an Outbound Call in Cisco Webex Contact Center for Salesforce

To place an outbound call:

Procedure

Step 1	In Salesforce, click the **App Launcher** menu and select **Webex Contact Center**.
Step 2	Enter the contact name in the **Search Salesforce** textbox and click the contact name, and then click the phone number to dial. Or, click **Phone > Dialer** and then enter the phone number and click the phone icon to dial.
Step 3	After the call is disconnected, an activity is logged for the respective Salesforce contact.

Create a Report in Cisco Webex Contact Center for Salesforce

To generate a report:

Procedure

Step 1	In Salesforce, click **App Launcher** > **Webex Contact Center**.
Step 2	From the Navigation Apps drop-down, select **Reports**.
	Note If the *reports* is not listed, click **Edit > Add More Items** and add the Reports.
Step 3	To see all the existing reports, click **All Reports**.
	Note There is a default call activity report that installs with Cisco Webex Contact Center for Salesforce client. You can modify the dates, and add or remove fields and filters.
Step 4	To create a new report, click **Reports > New Report**.
Step 5	In the Report Builder tab, select the required report type and then click **Save & Run**.
Step 6	Enter the `Report Name` and click **Save**.

Cisco Webex Contact Center for Salesforce generates this report using the data that is logged in the Salesforce.

Report Parameters in Cisco Webex Contact Center for Salesforce

The following parameters are available to track in Cisco Webex Contact Center:

Parameter	Description
Date	Indicates the date when the activity got created.

Parameter	Description
Subject	Indicates the activity happened along with date and time stamp.
Status	Indicates the status of the call. It is always complete.
Call Duration (Seconds)	Indicates the duration of the call in seconds.
Call Type	Indicates if the call type is inbound or outbound.
Call Result	Indicates wrap-up reason used after the call.
Call Object Identifier	Indicates the session ID for future debugging purpose.
Account ID	Indicates the owner ID to track the customer.
Ringing Time	Indicates count of ringing duration before the call is answered.
Wrap Up Duration	Indicates the time taken to update the details after the call ended.
Queue Name	Indicates the name of the queue where call is received.
Contact Type	Indicates the medium used to communicate. Currently, only call is provided.
Ani	Indicates the ANI digits delivered with the call. ANI is a service provided by the phone company that delivers the caller's phone number along with the call.
Dnis	Indicates the Dialed Number Identification Service (DNIS) digits delivered with the call. DNIS is a service provided by the phone company that delivers a digit string indicating the number the caller dialed along with the call.