Salesforce User Guide

In this user guide, you will learn the basic steps to process an inbound call to designated queue. Dahua Salesforce integrate a system called Shoretel Connect as the telephone program. Shoretel program run as an add-on menu on the bottom of Salesforce page.

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Requirements

All agents must have an account created / login to Sales force - https://login.salesforce.com/

Your salesforce account must be setup on your first day of work, for any assistance, please contact your system administrator.

Google Chrome is the preferred browser for this application.

Getting Started

Login to Salesforce

Your welcome email includes a link to your organization's Salesforce site and your login information. Click on the link provided in the email. The link logs you in to the site automatically. The site prompts you to set a password and choose a security question and answer to verify your identity in case you forget your password.

After you log in, it launches the main page of Salesforce (Picture 1). Shoretel Program (Computer Telephone Interface) is located on the bottom left hand corner (picture 2). When you click on the Phone button, it will expand and by clicking on it again, it will collapse.
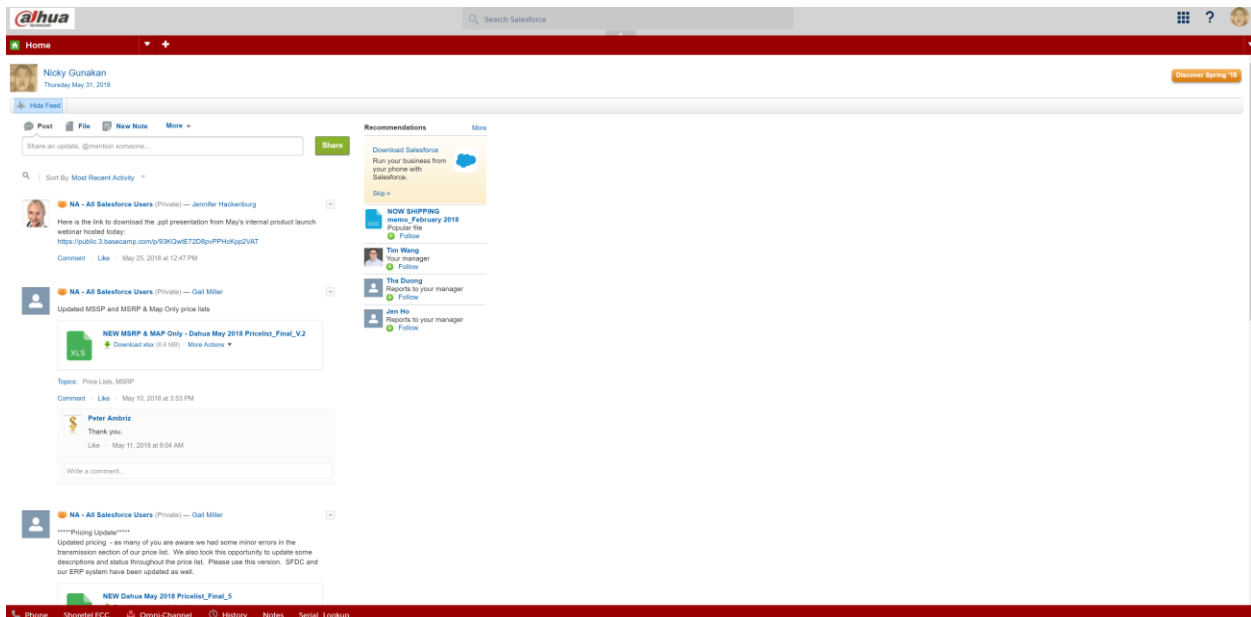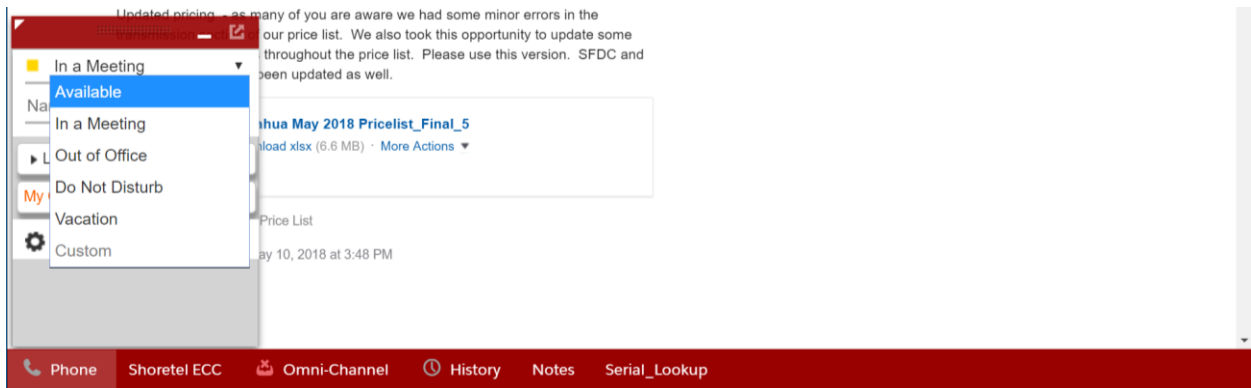

Picture 1
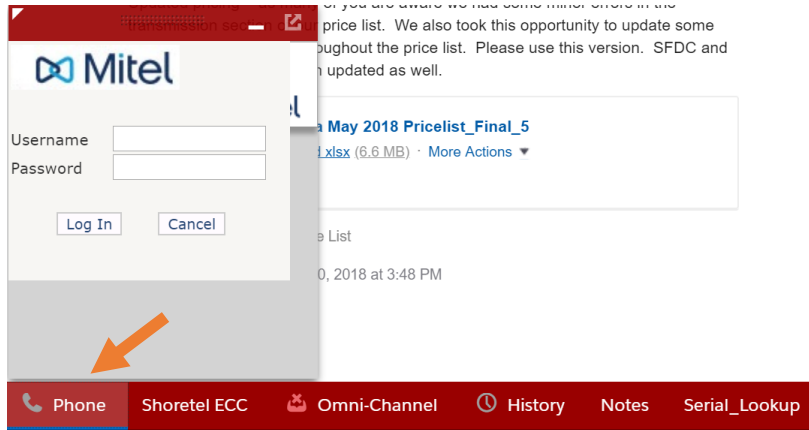
Picture 2

Enter the username and password of your Mitel Shoretel account which set by your system administrator. If it doesn't work, please reach out to System Administrator for additional assistance.

Now your phone has been linked to your Shoretel profile. To change your phone status, you just need to click on the available button (Picture 3).

There are 5 different status you can select. But Agent must always set their status to **Available** on this tab menu. Option to select different status will be available from different tab menu, will be explained on the next chapter.

Picture 3

Shoretel ECC

On this menu, please enter the same login credential as your login to the phone system in the previous step. After you successfully login, it will take you to the queue user interface (Picture 4).
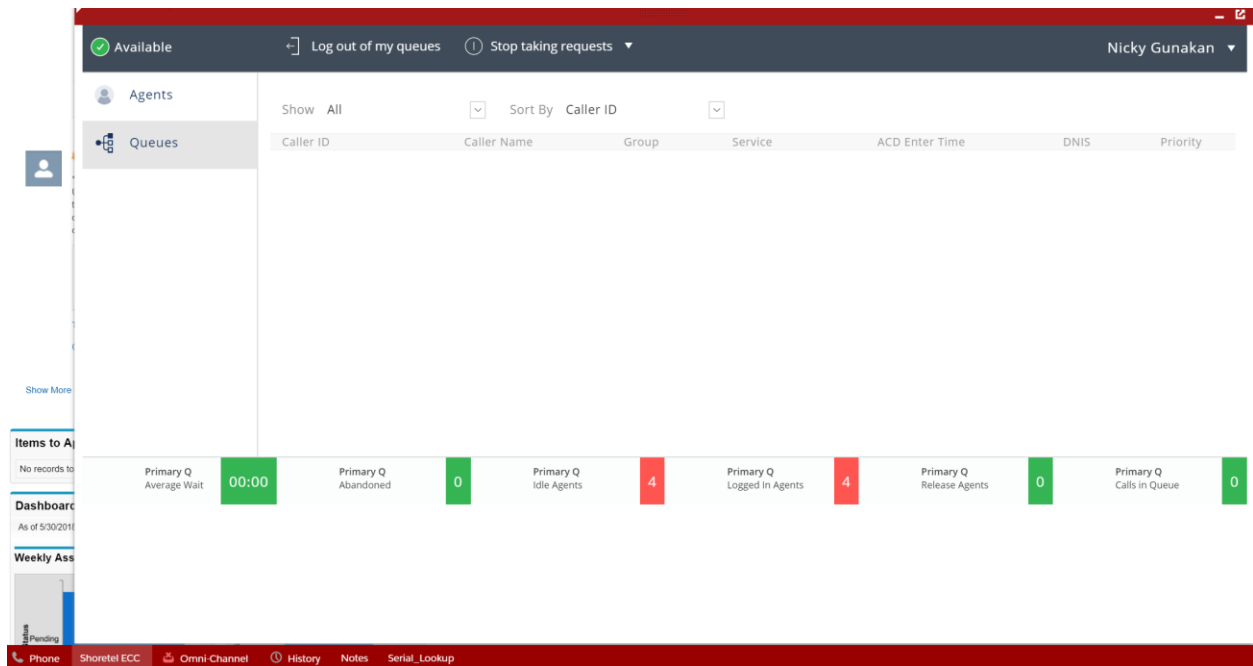
Picture 4

By default, your status is set to Available that means ready to receive inbound calls from the queue.

Note: It is important to ensure that microphone and audio setup are functioning before login to Salesforce system.

From this Shoretel ECC tab, agent is able to see this following:

1. **Avg wait** – Average customer wait time on the day
2. **Abandoned** – total abandoned call on the day
3. **Idle Agents** – Total number of agent who is currently available and ready to take request (email or phone call)
4. **Logged in Agents** – Total number of agent who is currently on the phone interaction with customer
5. **Release Agent** – Total number of agent who is currently set to away status and not available to take request (email or phone call)
6. **Calls in Queue** – Total number of calls in the queue.

Work Status Definition

Agent must select the correct work status in order to get the accurate performance review. Below is the definition of each work status.

1. **No Code –** default status for stop taking request
2. **Break –** Agent is taking his/ her break time
3. **Lunch –** Agent is out to lunch, for longer lunch time, team lead must be notified
4. **Training –** Agent is attending training session
5. **Meeting –** Agent is attending business/ department meeting
6. **Approved Busy –** agent who assigned to work on certain project by the team lead
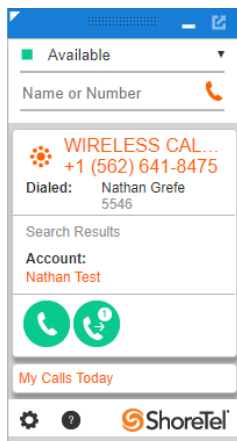
Receive call

After you set your status to Available under **Phone** menu, and also login successfully on **Shoretel ECC** menu, your Shoretel phone will ring when there is an incoming call. (Picture 5)
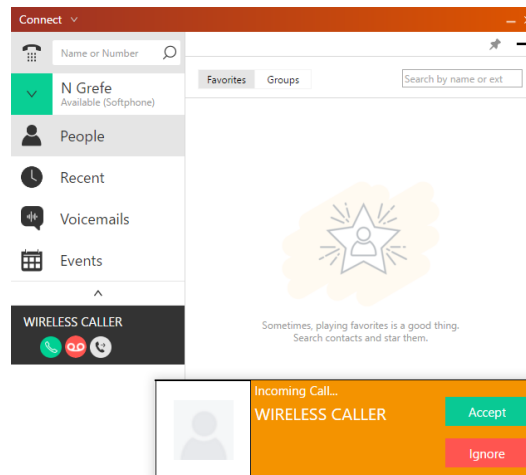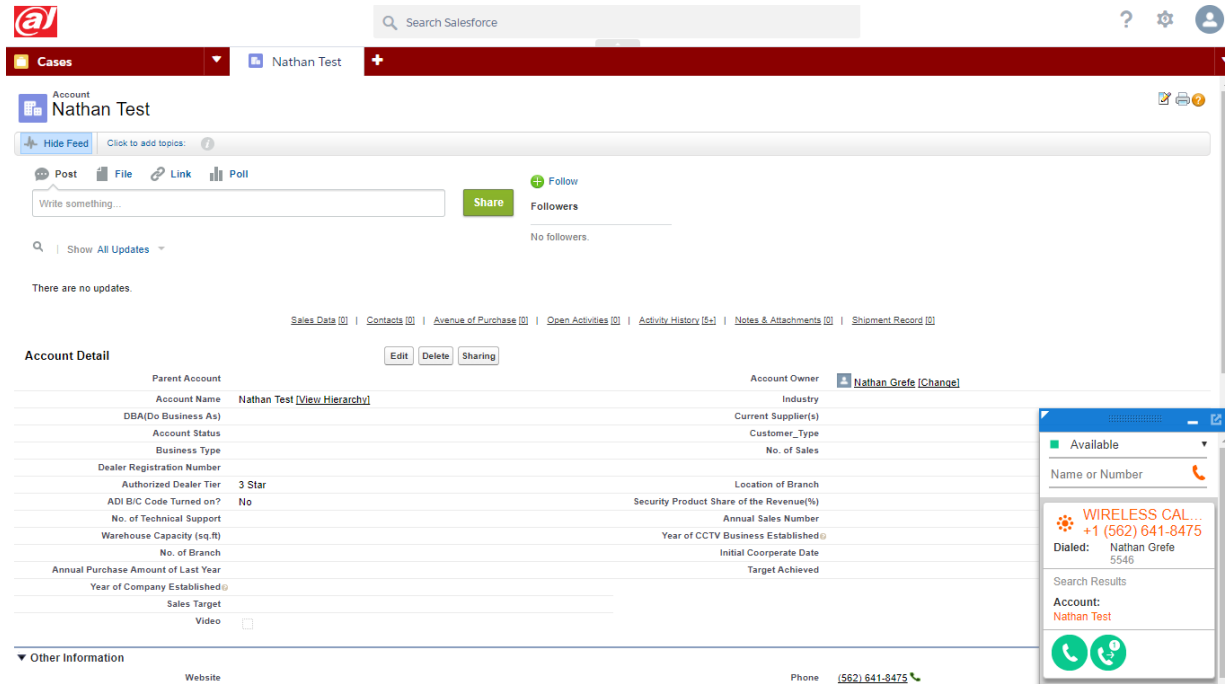

Picture 5

If the customer is already registered in the system, contact name will be provided on the **Phone** menu. (Picture 6)

Picture 6

Click on the customer name, and customer information will launch on the salesforce page. (Picture 7)
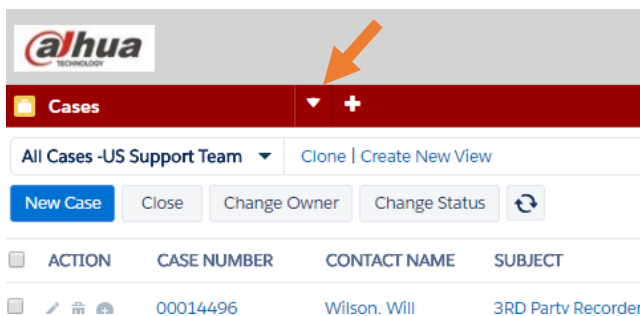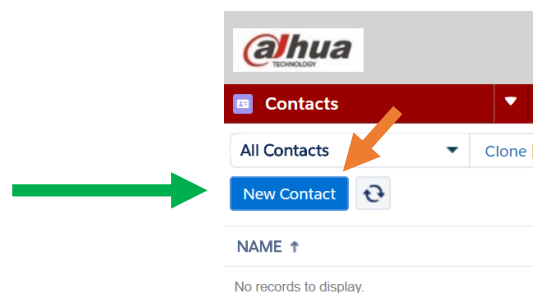

Picture 7

Create contact

In the event that customer is not registered in the system, New contact page will launch on the salesforce page. Then, agent need to create a contact that associated to the caller.

When contact page does not auto populate, Agent MUST follow this below steps:

Click on main salesforce tab on the top left (Picture 8), then click **Contacts**. Contact page will launch, then click on **New Contact** (Picture 9). Now agent can fill out customer information and click on **Save.**

Picture 8

Picture 9

Note: Please DO NOT use NEW contact button under Case page. This will cause the contact to not appear or added properly to the system. When in doubt, double check with your team lead.

Find contact

If the customer stated that they have called us before, their contact information might be saved under different phone number. Agent can use Salesforce search bar to search customer information (Picture 10)

Picture 10

Create Case

After contact information appear on Salesforce page, scroll down and click on **New Case** (Picture 11).

Picture 11

Case page will launch and agent will enter all case information on that page (Picture 12).

Picture 12

Agent must always click on Save button in order to complete the case creation.

Add Product info to case

To attach the product information, click on **New Product** button under product section (picture 13).

Picture 13

Product information page will launch, and click on search icon, and select the product. (Picture 14)

Product Edit
New Product

Product Edit			Save	Save & New	Cancel
Information					

Product Model	[ ] 🔍	
CaseNumber	00014491 🔍	
Firmware Version	[ ]	
LAN IP	[ ]	
WAN IP	[ ]	
HTTP Port	[ ]	
TCP Port	[ ]	
Serial Number	[ ]	

	Save	Save & New	Cancel

🔵 Search for a product ~ Salesforce - Enterprise Edition - Google Chrome — ☐ ✕

ⓘ https://ap6.salesforce.com/_ui/common/data/LookupPage?lkfm=editPage&lknm=CF00N0K00000JEJlo...

🔍 Lookup

[Search...   ] [Go!]

Filter by [--None-- ▼] [--None-- ▼] [   ]

You can use "*" as a wildcard next to other characters to improve your search results.

Recently Viewed Products

The search returned more than the maximum number of rows (200). Please refine your search criteria.

| Product Name	NA Product Family	Inner Model	Product Description	Detailed Descript
12203TNI			2MP 3X Starlight IP PTZ	
1A203TNI			2MP 3x Starlight IR IP PTZ	
22204TNI			2MP 4x IP Dome PTZ IP67	1/2.8" 2MP STAF 4x PTZ, Starlight (Color), ICR, WD 11mm, DC12V, P codec H.264/H.2
40212IC			2MP HDCVI PTZ Dome Starlight	1/2.8" STARVIS (0.005Lux/F1.6, 1 30fps/1080P AC

Picture 14

Close case

Prior closing the case, Agent needs to ensure that all information is entered and saved. Click on **Close Case** will complete the case and make case unmodifiable.

Note: Agent should not close the case if that call needs to be transferred or escalated.
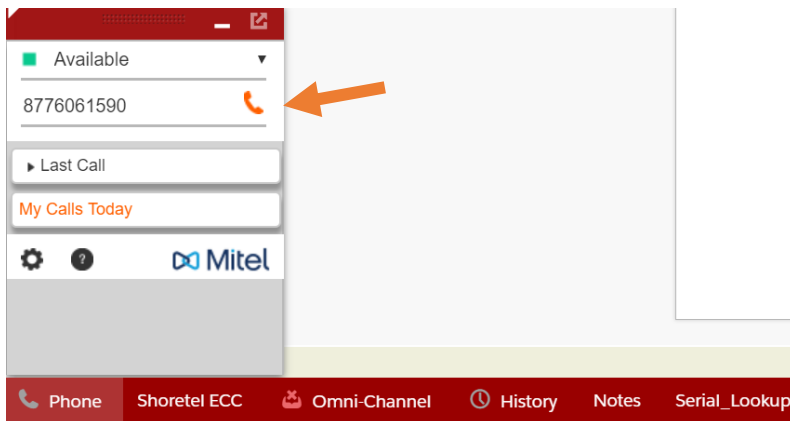
Make an Outbound call

To make an outbound call, Agent will click on **Stop taking request** (Picture 15). Enter the number you like to dial and click on the phone button to start the outbound call.
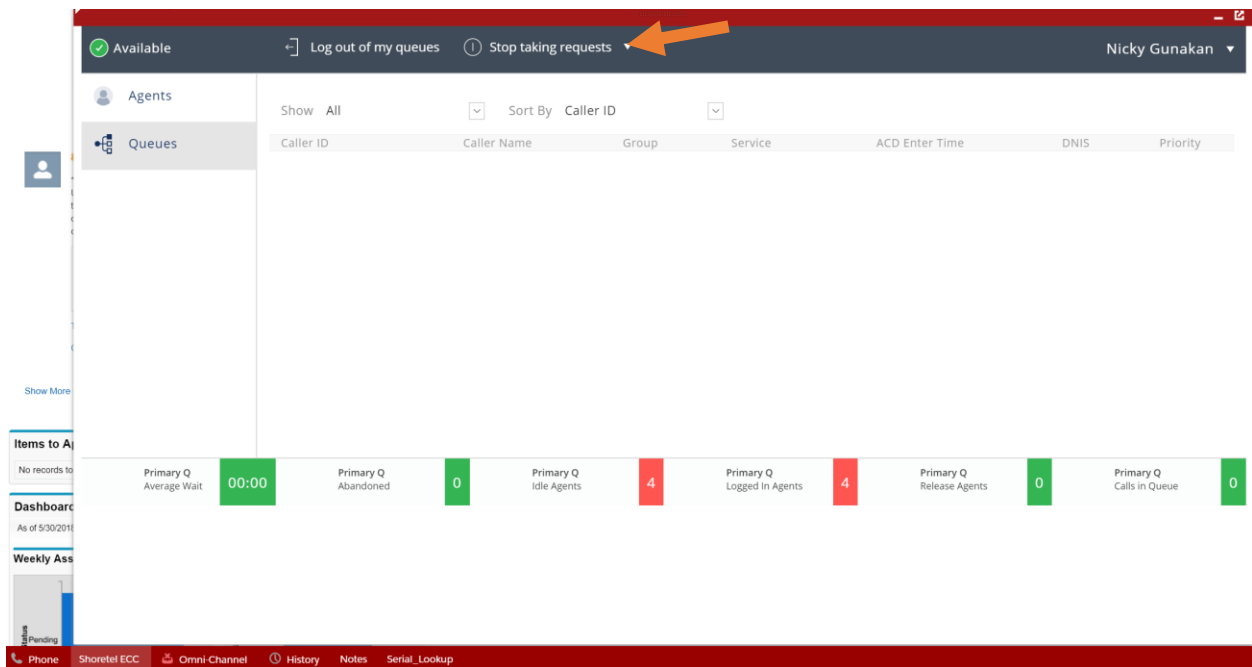
Picture 15

Click on the phone tab and enter the number you like to dial, then press the call button (Picture 16).
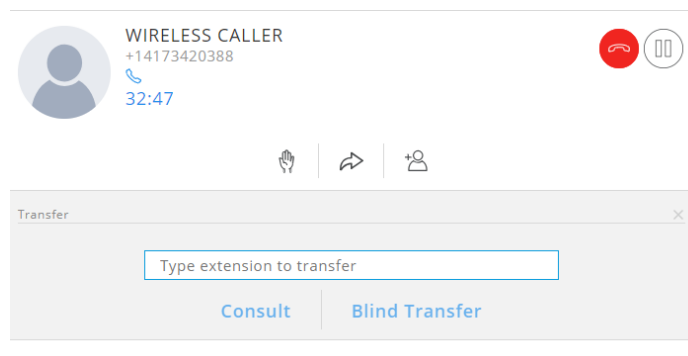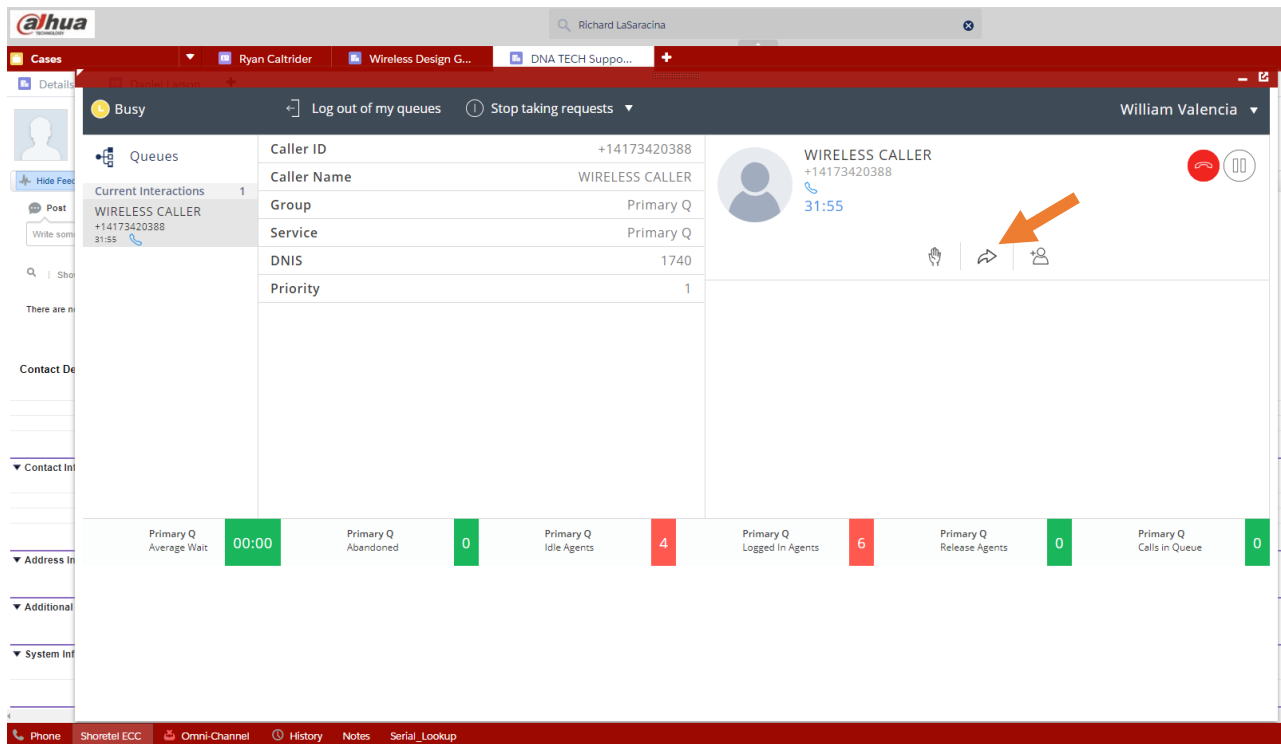

Picture 16

Transfer call

There are two ways to transfer a call to another person:

1. **Blind transfer**: Transfer a call without speaking to the intended recipient. When call transferred to the group/ queues, agent needs to use this option.
2. **Consult transfer**: Transfer a call after speaking to the intended recipient.

Click on the **Transfer** ↗ from your active phone interface, and begin typing the intended extension, and press transfer to complete the transfer (Picture 17).

Picture 17

Escalate case

All cases are set to open status by default. Towards the end of the call, agent will select the case status. Below are the most uses case status and its definition:

1. **Open –** default case status when Agent create case.
2. **Pending –** Agent set case to this status when all customer questions are answered and done with troubleshooting.
3. **Escalated –** agent need to escalate this case to JP Wenger.
4. **Auto-Closed –** Salesforce system will automatically set case to this status when there is no activity on this case for 5 days.
5. **Closed –** Agent manually close the ticket using **Close** button.
6. **On-Hold –** Agent need to perform test and will get back to the customer.
7. **Closed as duplicate –** There is a multiple case open, Agent will inform JP Wenger and he will merge the ticket and set to original ticket to this status.

Logging out

It's important to log out of **Salesforce** at the end of the day.