

Configuring advanced features of NewVoiceMedia in Salesforce

When you have configured your NewVoiceMedia and Salesforce integration, you can optionally further customize your installation by configuring some or all of the following advanced features. As you configure advanced features for your NewVoiceMedia and Salesforce integration, refer to this checklist to ensure that you complete all the required tasks.

Custom settings

To configure some of the optional features, you must configure some custom settings. These optional features are indicated by an asterisk (*).

Add an Activities tab (Salesforce Classic only)

By default, activity records are listed within the Activity History (Salesforce Classic) or Past History (Salesforce Lightning Experience) sections in their related Salesforce objects. If you are using Salesforce Classic, you might want to add an Activities tab to help you locate all activities in a view.

Automate callback numbers for Click to dial*

If enabled for your account, you can configure NewVoiceMedia to dynamically select a callback number.

Automate call recording for outbound calls*

If enabled for your account, you can configure NewVoiceMedia to automatically record outbound calls.

Configure call logging in task records*

If enabled for your account, you can configure pages so that agents can add notes to a task record from within an open Salesforce object.

Configure call recording annotation in Salesforce

If enabled for your account, you can configure the call recording annotation feature in Salesforce.

Configure call recordings in task records*

By default, to listen to call recordings, supervisors must log in to the Call Recordings module in NewVoiceMedia. Alternatively, you can provide a way for agents to access or listen to the call recording from within the related Salesforce task record. You can also enable agents to rate the quality of the call recording.

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Configure Conversation Analyzer in Salesforce*

If enabled for your account, Conversation Analyzer enriches the call recording player experience.

Get started with NewVoiceMedia Conversation Analyzer Analytics

If enabled for your account, you can use Conversation Analyzer Analytics in Salesforce. The Conversation Analyzer Analytics feature analyzes your Salesforce CRM data seamlessly with data from your NewVoiceMedia account and from Conversation Analyzer. This integration provides you more business insights than Conversation Analyzer on its own. You can also gain a better understanding about what conversations are being had and when.

Configure disposition codes for NewVoiceMedia in Salesforce*

If you want to enable agents to provide a disposition code for their interactions, you must create and configure a disposition code field. If the enforced disposition codes feature is enabled for your account, you can also prevent NewVoiceMedia assigning another interaction to an agent before the agent has provided a disposition code for their previous interaction.

Configure multi-interaction routing

To use multi-interaction routing, both the multi-interaction routing and NewVoiceMedia omni-channel features must be enabled for your account. Contact your account manager if you want to enable these features for your account. You can then configure omni-channel for NewVoiceMedia by integrating with Salesforce Omni-Channel presence or Salesforce external routing.

Configure Salesforce record popping

If enabled for your account, you can configure various popping features.

Configure scheduled callbacks (Salesforce Classic only)

If you are using Salesforce Classic, and if enabled for the account, an agent can schedule a callback.

Integrate NewVoiceMedia with Salesforce1

You can use NewVoiceMedia version 1.9 onwards with Salesforce1.

Integrate with Salesforce Omni-Channel (Salesforce Classic only)

If you are using Salesforce Classic, and if enabled for your account, you can integrate your NewVoiceMedia agents' states with Salesforce Omni-Channel's presence statuses to ensure the work is routed to the agents effectively.

Post a message to the Chatter feed when an agent adds notes or creates a callback* (Salesforce Classic only)

If you are using Salesforce Classic, you can configure NewVoiceMedia to post to the Chatter feed when an agent adds notes or schedules callbacks.

Process task creation failures

Occasionally NewVoiceMedia fails to create a task after a call, generally in Salesforce orgs running a large number of competing processes. Failing to create a task loses the information provided by the agent in the Log a Call area. If enabled for your account, NewVoiceMedia automatically retries creating the task. If this second attempt fails, you can process the task creation yourself.

Reconfigure NewVoiceMedia in Salesforce for disaster recovery

Sometimes, usually for disaster recovery, you will need to migrate your NewVoiceMedia account to an alternative node.