

*THE ULTIMATE GUIDE*

TO OPTIMIZING YOUR SALESFORCE POWERED

# CALL CENTER



transera

eBook

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# Introduction: The Problem with Salesforce

Salesforce is a great tool for call centers everywhere. Salesforce allows call center agents to easily interact with customers and report the results of their interactions. But with all the industry buzz surrounding the email and chat capabilities available in Salesforce, 90% of customers still prefer to talk to someone. With Salesforce, you can handle pretty much every aspect of your call center within the program—except for voice calls. To please the customers who prefer to speak with someone during interactions, contact center agents and managers must open multiple platforms in order to make and receive calls and manage reporting. Things can quickly become confusing and difficult to manage when contact center personnel have to switch back and forth between Salesforce and other applications, and often both the agent and customer are left feeling frustrated with the hassle. Imagine the time, energy, and headaches that could be saved if voice calling was available on the same platform as other interaction channels, with a fully integrated agent desktop,

seamless provisioning, and unified reporting. Imagine overall customer satisfaction if callers no longer had to repeat previously answered questions or discussion. That's where Transera comes in. With Transera's Salesforce app, you can handle voice interactions and record a complete history of customer interactions all within Salesforce. Say goodbye to the days of juggling multiple applications to manage customer interactions. As a native part of Salesforce, Transera's Salesforce app gives you the ability to access everything from one platform.

“Transera delivers call center management, administration, routing and reporting capabilities from within the Salesforce application itself. Our customer, call, and agent data is integrated into the Salesforce database for unified visibility and control. We also add Interactive Voice Response (IVR) and call routing strategies both of which can be driven by the data in Salesforce, resulting in better customer experiences.”

- [TRANSERAINC.COM](http://TRANSERAINC.COM)

In this eBook, we will discuss how you can optimize your call center and access voice through Transera's Call Center App for Salesforce.



## Eliminate the Reporting Headache

When contact center managers have to access an application outside of Salesforce to get “voice,” it creates an unnecessary headache. Far too much time and energy is wasted switching between applications for voice and reporting, and customers become frustrated while agents scramble to open all necessary applications to handle a call. If your team has to use several portals to make calls and gather analytics, the process becomes taxing on you, the agents, and the customers.

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“Transera creates Call Data Records and Agent Activity Records as native Salesforce objects so you can leverage all the reporting functionality within Salesforce to create call center reports that combine Salesforce and call center data. In addition, Transera appends the Salesforce lead, case, contact or similar record with call data and custom wrap-up codes.”

- [TRANSERAINC.COM](http://TRANSERAINC.COM)

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Luckily, Transera’s Salesforce app integrates all of your monitoring and reporting into one central location using native Salesforce database objects and reporting tools. This integration eliminates headache and error, making your call center run smoother and more efficiently.

# Streamline Your Supervisor Management Process

[Click here for a youtube video describing this process!](#)

Instead of adding yet another application to your call center to enable voice, why not use the application you already have? Streamline your sales process with the Transera Salesforce app.

The Transera Call Center App for Salesforce makes it easy for you to build and administer a voice call center within Salesforce without having to log in to another application. With a simple point-and-click user interface, call center managers can set up call center sites and teams, and assign agents to teams—all without ever having to leave the Salesforce app.

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“ With the Transera Call Center App for Salesforce, you don’t have to add another application to your infrastructure that requires redundant login, users and administration. You can set up and administer your call center within the Salesforce Administration and Build functions. ”

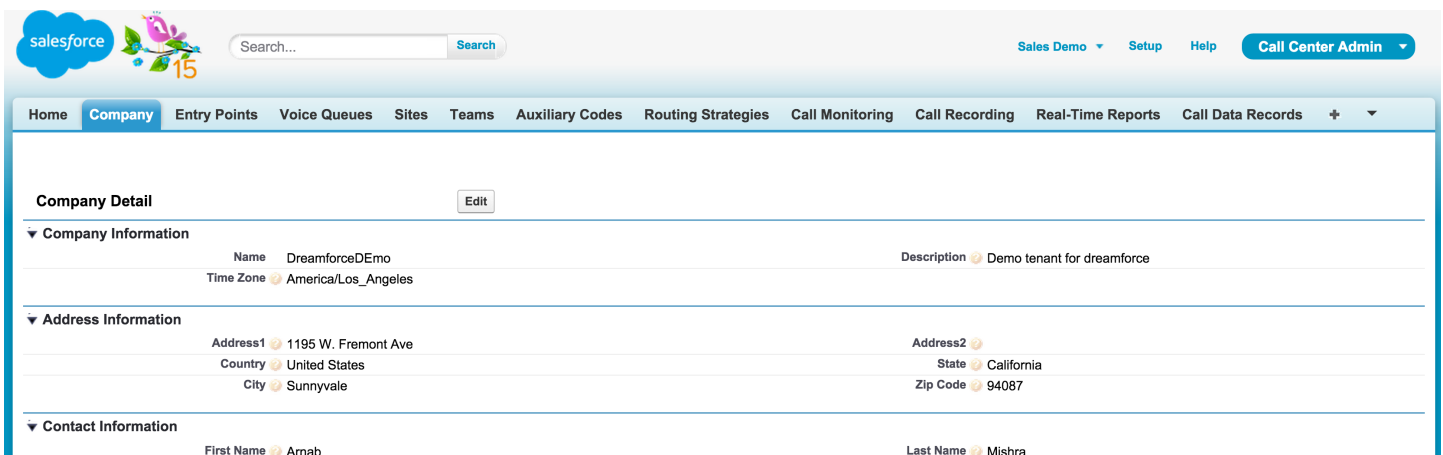
- TRANSERAINC.COM

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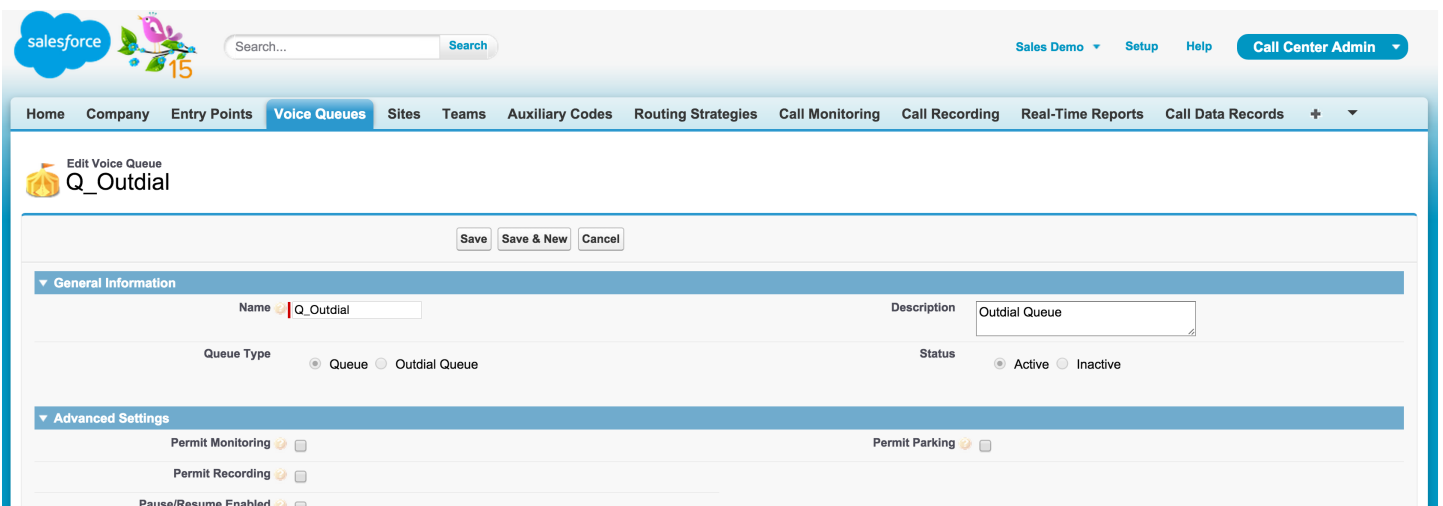
Implementing the Transera Call Center App is as simple as setting up a few basic building blocks.

1. Define basic information about your company and global settings such as maximums for active calls, entry points, queues, and disconnects.



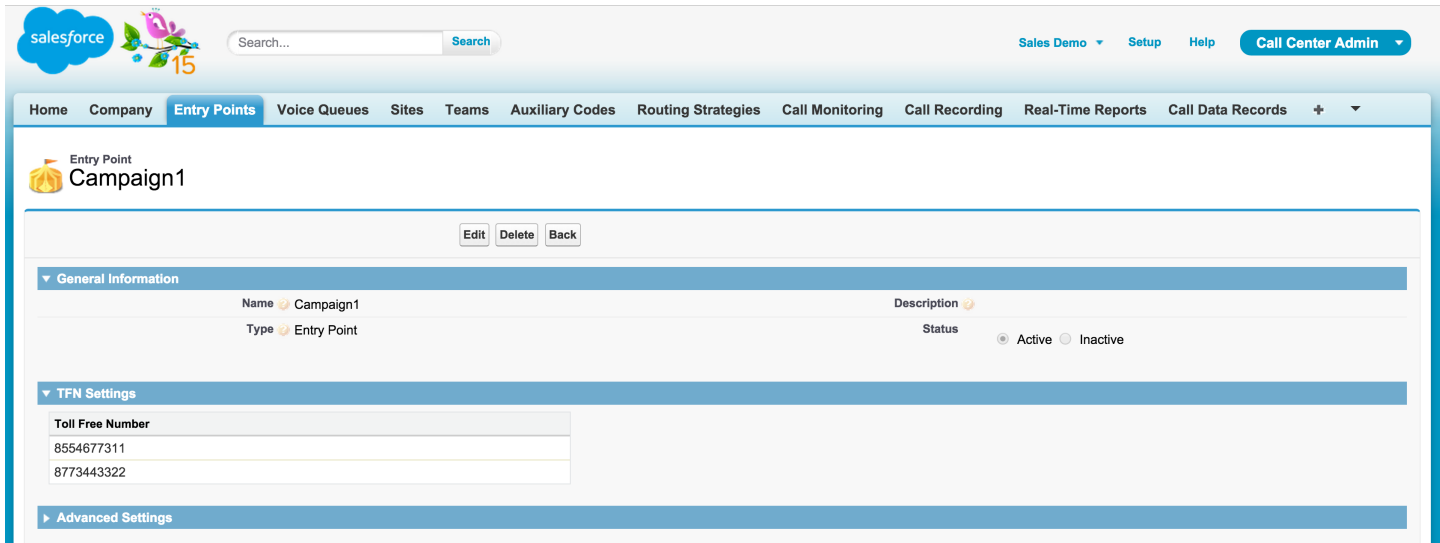
The screenshot shows the 'Company Detail' page in Salesforce. The page has a header with the Salesforce logo, a search bar, and navigation links for Sales Demo, Setup, Help, and Call Center Admin. Below the header is a navigation bar with links for Home, Company, Entry Points, Voice Queues, Sites, Teams, Auxiliary Codes, Routing Strategies, Call Monitoring, Call Recording, Real-Time Reports, and Call Data Records. The main content area is titled 'Company Detail' and contains three sections: 'Company Information', 'Address Information', and 'Contact Information'. Each section has a list of fields with their values. The 'Company Information' section includes Name (DreamforceDEmo), Time Zone (America/Los\_Angeles), and Description (Demo tenant for dreamforce). The 'Address Information' section includes Address1 (1195 W. Fremont Ave), Country (United States), City (Sunnyvale), Address2, State (California), and Zip Code (94087). The 'Contact Information' section includes First Name (Arnab) and Last Name (Mishra). An 'Edit' button is located next to the 'Company Detail' header.

2. Define call center entry points, which determine how calls come into the center. Entry points can be used to support specific campaigns, business units, product lines, or geographies.



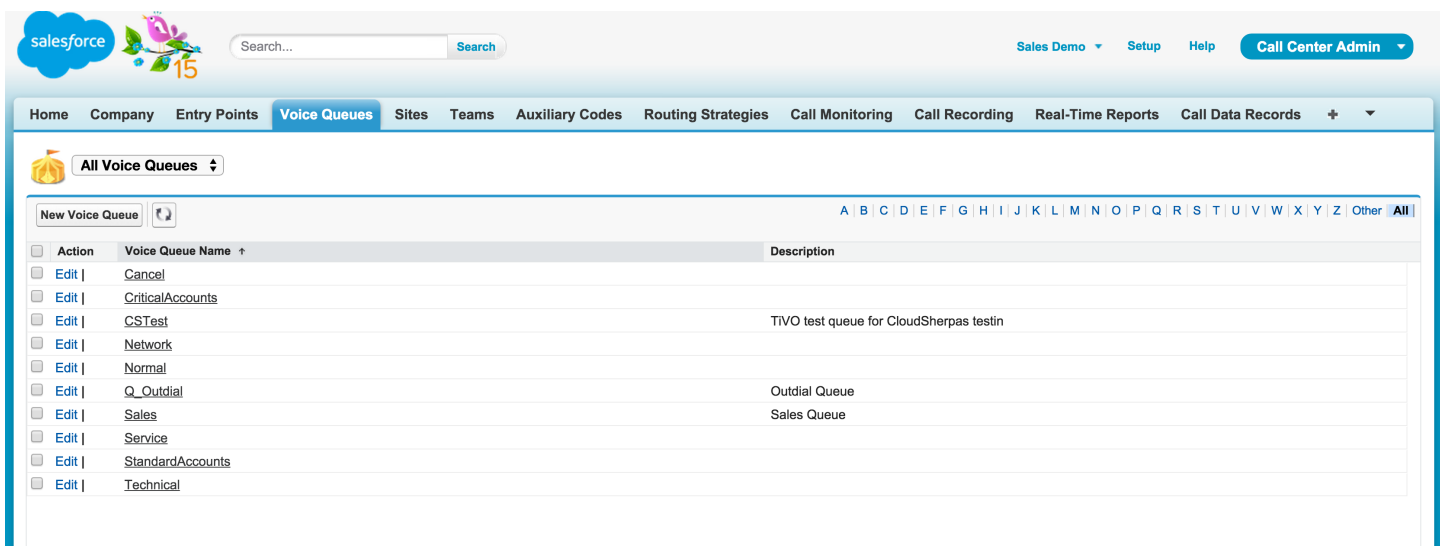
The screenshot shows the 'Edit Voice Queue' page in Salesforce for a queue named 'Q\_Outdial'. The page has a header with the Salesforce logo, a search bar, and navigation links for Sales Demo, Setup, Help, and Call Center Admin. Below the header is a navigation bar with links for Home, Company, Entry Points, Voice Queues, Sites, Teams, Auxiliary Codes, Routing Strategies, Call Monitoring, Call Recording, Real-Time Reports, and Call Data Records. The main content area is titled 'Edit Voice Queue Q\_Outdial' and contains two sections: 'General Information' and 'Advanced Settings'. The 'General Information' section includes fields for Name (Q\_Outdial), Description (Outdial Queue), Queue Type (Queue), and Status (Active). The 'Advanced Settings' section includes checkboxes for Permit Monitoring, Permit Recording, Pause/Resume Enabled, and Permit Parking. Buttons for Save, Save & New, and Cancel are located at the top of the form.

3. You then associate toll-free numbers with each entry point, activate or deactivate the entry point, define call maximums, and the phone number for overflow calls.



The screenshot shows the Salesforce Call Center Admin interface. The top navigation bar includes 'Home', 'Company', 'Entry Points', 'Voice Queues', 'Sites', 'Teams', 'Auxiliary Codes', 'Routing Strategies', 'Call Monitoring', 'Call Recording', 'Real-Time Reports', and 'Call Data Records'. The 'Entry Points' tab is selected. The main content area shows the configuration for 'Campaign1' under 'Entry Point'. It includes a search bar, 'Edit', 'Delete', and 'Back' buttons. The 'General Information' section shows 'Name: Campaign1', 'Description: ', 'Type: Entry Point', and 'Status: Active'. The 'TFN Settings' section shows 'Toll Free Number' with two input fields containing '8554677311' and '8773443322'. The 'Advanced Settings' section is collapsed.

4. Set up voice queues for your call center. Voice queues are where customers wait until an agent becomes available to take the customer's call.

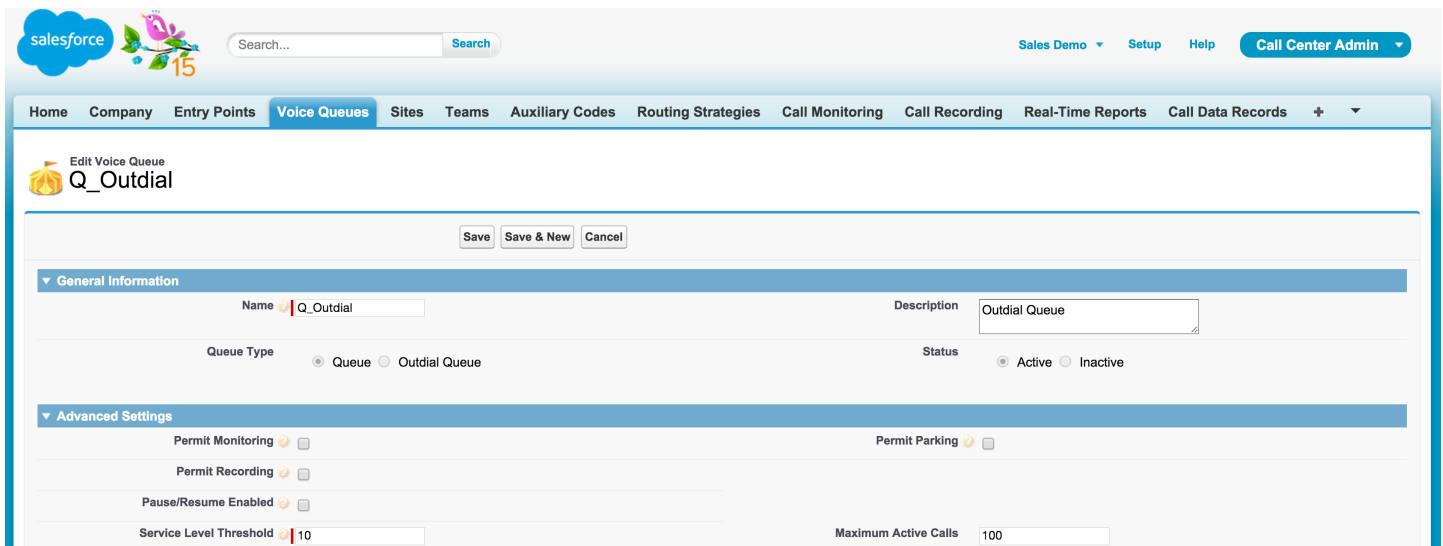


The screenshot shows the Salesforce Call Center Admin interface with the 'Voice Queues' tab selected. The main content area shows a table of voice queues. The table has columns for 'Action', 'Voice Queue Name', and 'Description'. The 'All Voice Queues' dropdown is set to 'All'. The table lists several queues, including 'Cancel', 'CriticalAccounts', 'CSTest', 'Network', 'Normal', 'Q\_Outdial', 'Sales', 'Service', 'StandardAccounts', and 'Technical'. The 'Description' column contains details for some queues, such as 'TIVO test queue for CloudSherpas testin' and 'Outdial Queue'.

Action	Voice Queue Name	Description
<a href="#">Edit</a>	Cancel	
<a href="#">Edit</a>	CriticalAccounts	
<a href="#">Edit</a>	CSTest	TIVO test queue for CloudSherpas testin
<a href="#">Edit</a>	Network	
<a href="#">Edit</a>	Normal	
<a href="#">Edit</a>	Q_Outdial	Outdial Queue
<a href="#">Edit</a>	Sales	Sales Queue
<a href="#">Edit</a>	Service	
<a href="#">Edit</a>	StandardAccounts	
<a href="#">Edit</a>	Technical	

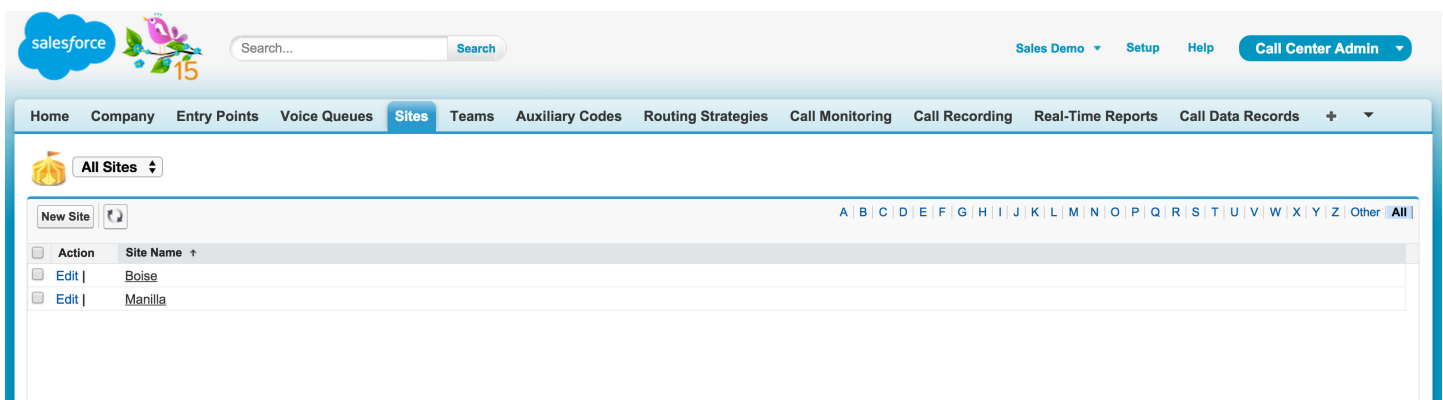
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For each queue, you can define for inbound or outbound calls, as well as defining permits, monitors and recording, and service level thresholds. You can also define when an alert signals that a customer has been waiting on a line for too long, as well as other SLA KPIs such as maximum wait time.



The screenshot shows the 'Edit Voice Queue' page in Salesforce. The page title is 'Edit Voice Queue' with a sub-header 'Q\_Outdial'. There are buttons for 'Save', 'Save & New', and 'Cancel'. The page is divided into two main sections: 'General Information' and 'Advanced Settings'. In the 'General Information' section, the 'Name' is 'Q\_Outdial' and the 'Description' is 'Outdial Queue'. The 'Queue Type' is set to 'Queue' (radio button selected) and the 'Status' is set to 'Active' (radio button selected). In the 'Advanced Settings' section, there are checkboxes for 'Permit Monitoring', 'Permit Recording', and 'Permit Parking', all of which are currently unchecked. There is also a 'Pause/Resume Enabled' checkbox, which is unchecked. The 'Service Level Threshold' is set to '10' and the 'Maximum Active Calls' is set to '100'.

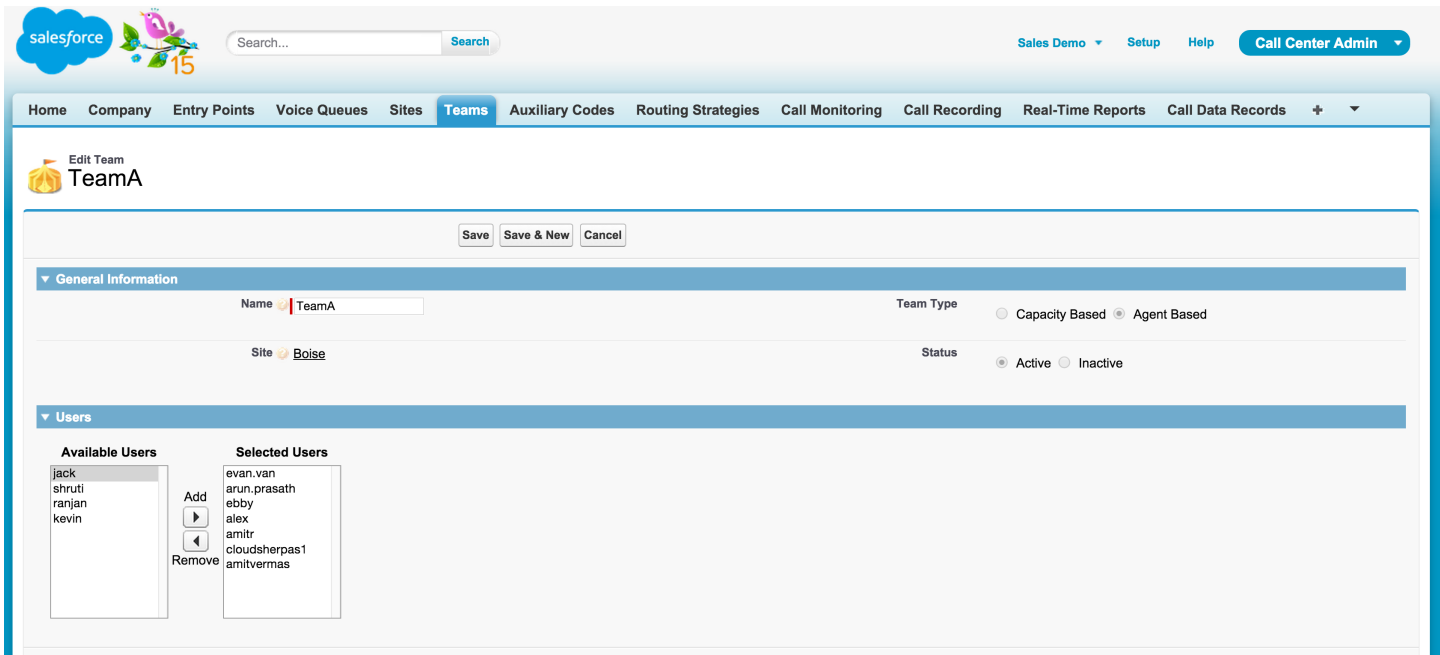
5. Set up your call center sites and teams with a simple point-and-click, and assign agents to teams.



The screenshot shows the 'All Sites' page in Salesforce. The page title is 'All Sites'. There is a 'New Site' button and a search bar. Below the search bar, there is a table with columns 'Action' and 'Site Name'. The table contains two rows: one for 'Boise' and one for 'Manilla'. Each row has an 'Edit' link next to it. At the top of the table, there is a navigation bar with letters A through Z and 'Other' and 'All'.



Agents already set up with email and chat in Salesforce can become phone agents as well. The same user profiles used in Salesforce work to access the Transera Call Center App.



**General Information**

Name: TeamA

Team Type: ☐ Capacity Based ☒ Agent Based

Site: Boise

Status: ☒ Active ☐ Inactive

**Users**

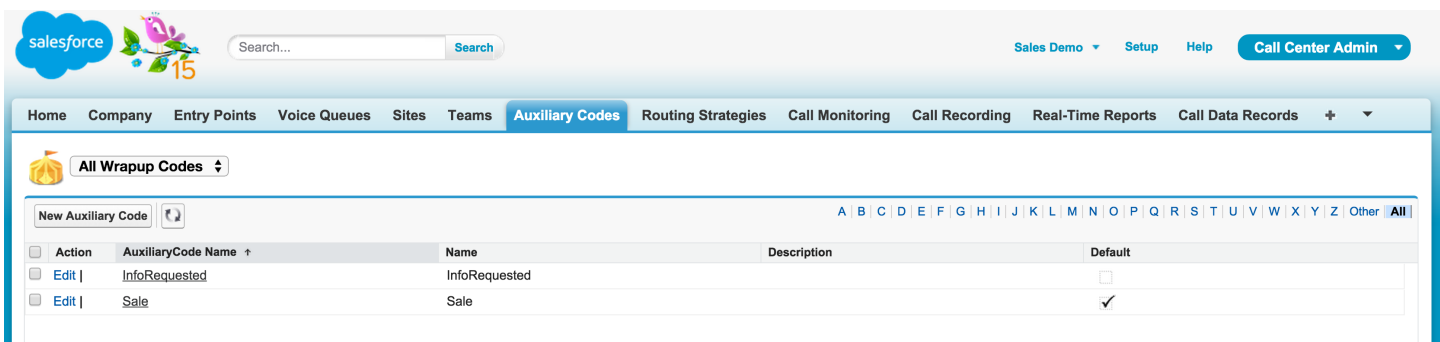
**Available Users**

- jack
- shruti
- ranjan
- kevin

**Selected Users**

- evan.van
- arun.prasath
- ebby
- alex
- amtr
- cloudsherpas1
- amitvermas

6. Create status codes for agents to use, as well as wrap-up codes that designate how a call is or is not resolved.



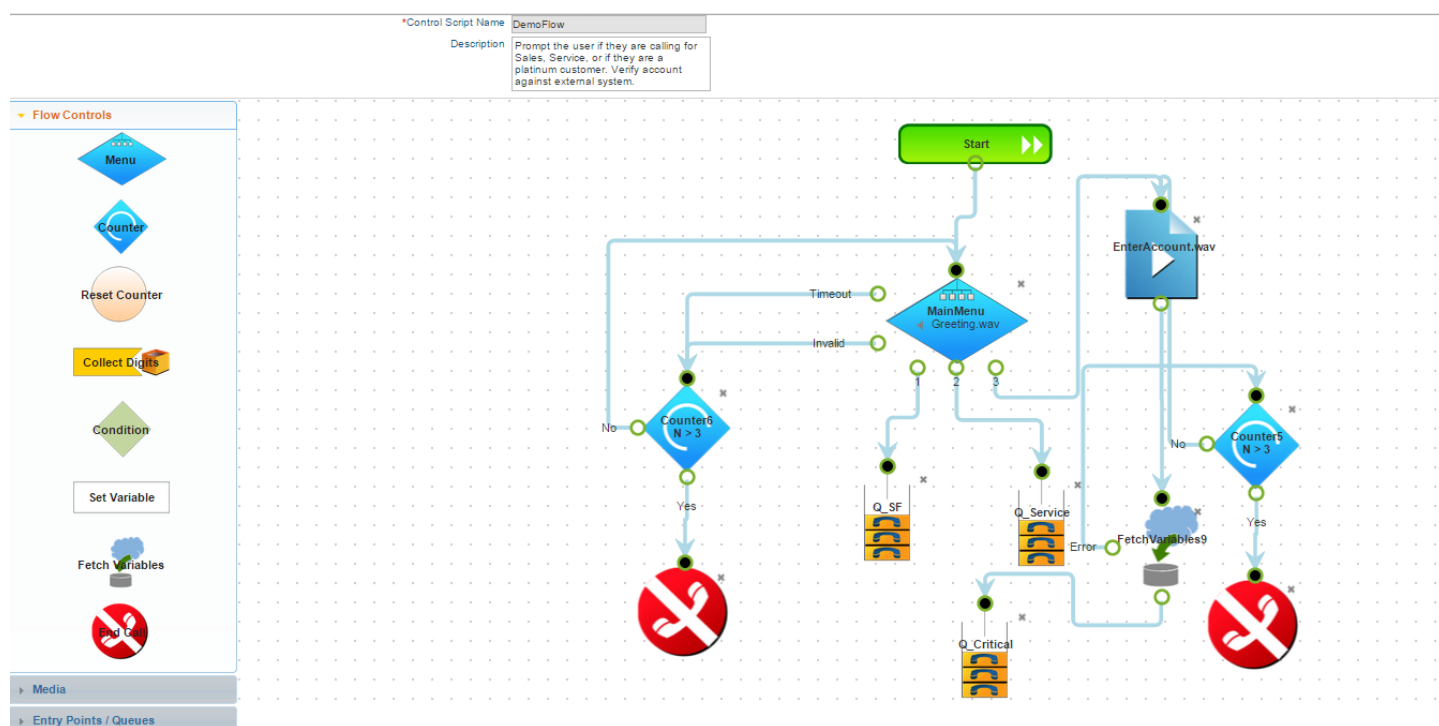
**All Wrapup Codes**

Action	AuxiliaryCode Name	Name	Description	Default
<a href="#">Edit</a>	InfoRequested	InfoRequested		<input type="checkbox"/>
<a href="#">Edit</a>	Sale	Sale		<input checked="" type="checkbox"/>

Once your call center building blocks are established, your new streamlined process within the Transera Call Center App for Salesforce will help you track what's going on in your call center. Real-time dashboards and KPIs within the app make the process that much easier.

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7. Create Call Flows and associate them to entry points. Use the control blocks in the Call Flow builder to define the IVR call flow that the caller experiences. Control block components enable playing prompts/wave files and capturing information from the caller. Decisions for routing the call to an appropriate queue or entry point can be made based on the caller entered parameters, call associated data, and/or the query result from an external system or database.



Flow Control shows the decision points, control points, counters, and database lookups for calls. Using a simple drag and drop interface, you can add a menu component that welcomes callers and prompts input. You can add paths for a sales queue, a service queue, and a premium customer path. You can then specify the number of items to offer callers, the how many chances to give the caller to enter a valid menu option, and what to do if the caller does not enter an option.

## Agent Productivity

[Click here for a youtube video describing this process!](#)

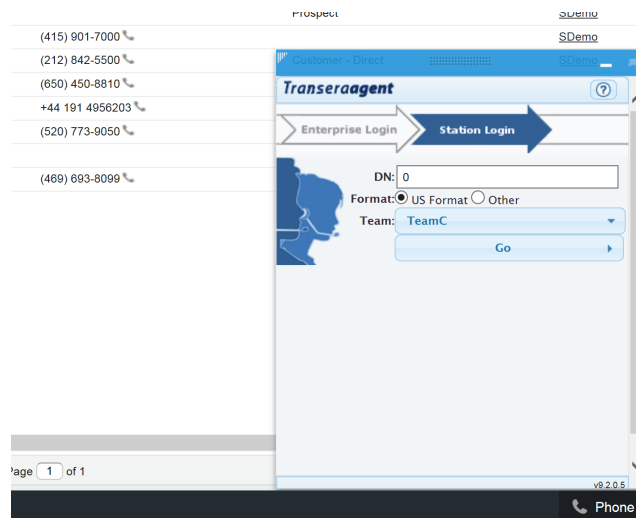
Using Transera in conjunction with Salesforce allows you to build and administer a voice call center within Salesforce Service Cloud and Sales Cloud applications, saving the time once necessary to switch between applications, thus increasing overall contact center productivity.

“Make your call center agents more productive and effective by letting them make and receive calls within the Salesforce application, while automatically logging pertinent data about their calls in the Salesforce database.”

- TRANSERAINC.COM

After implementing the Transera Call Center App, accessing and using voice within Salesforce is a matter of following a few simple steps.

1. An agent clicks the phone icon to open the agent applet, enters the telephone number where they can be reached, and selects the contact center team they are joining.

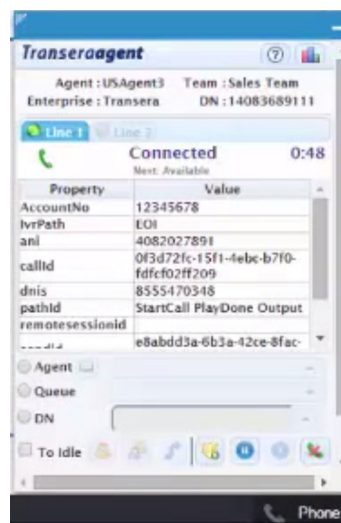
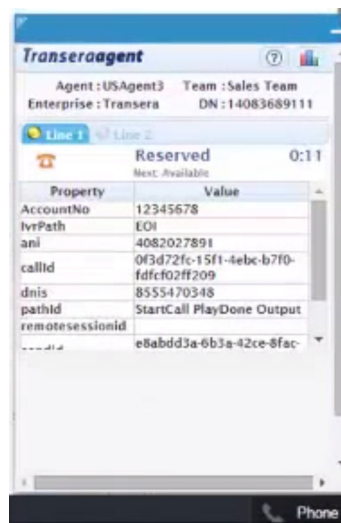


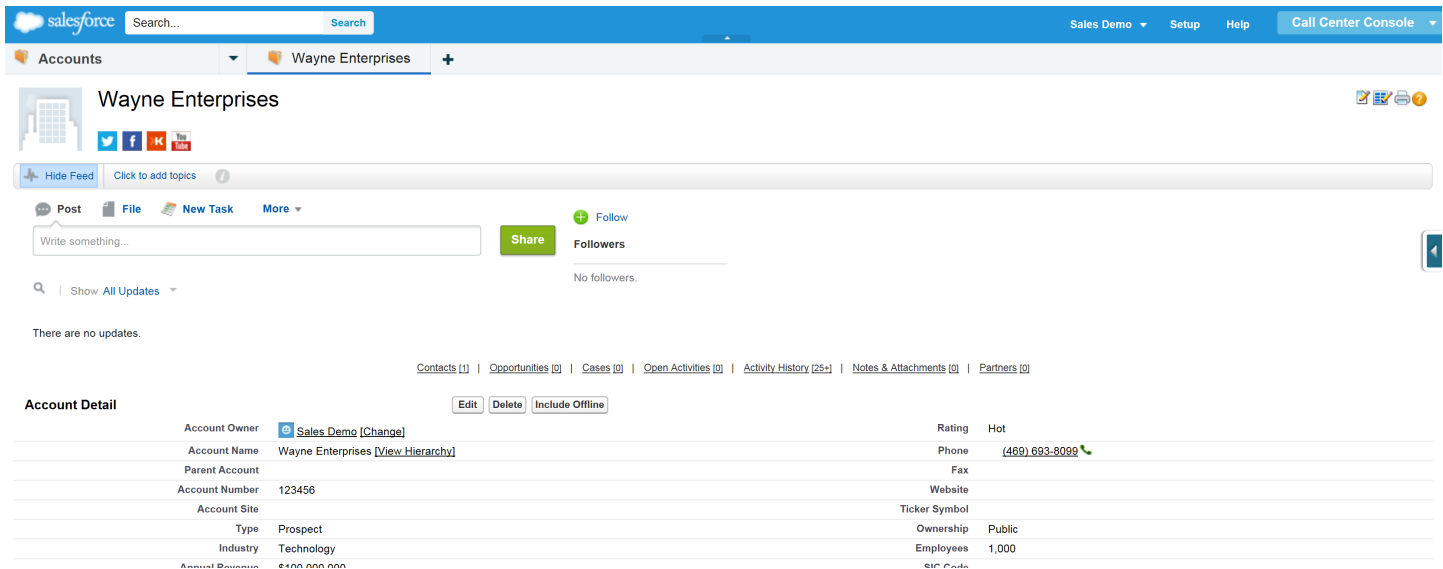
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The agent then specifies whether he or she is available to take calls, and is reserved until connected with a caller.

2. The applet displays any available information about the incoming call and opens the Salesforce record of the caller. The agent can access the entire history of the caller's interactions without having to open a separate database application.

One of the most time-consuming and frustrating interactions between a call center agent and a customer is repeating already answered questions or discussions. However when an agent has complete access to a caller's history from within Salesforce, he or she no longer needs to repeat questions or discussions, and agent productivity increases as less time is wasted on repetition. The agent can start a conversation with the full context of the customer's discussions, saving the customer the frustration of repeating his or her question or discussion.





**Wayne Enterprises**

Hide Feed | Click to add topics

Post | File | New Task | More

Write something... [Share](#) [Follow](#)

Followers: No followers.

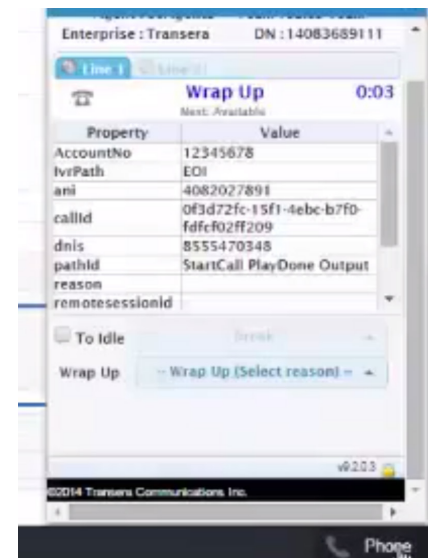
There are no updates.

Contacts (1) | Opportunities (0) | Cases (0) | Open Activities (0) | Activity History (25+) | Notes & Attachments (0) | Partners (0)

**Account Detail** [Edit](#) [Delete](#) [Include Offline](#)

Account Owner	<a href="#">Sales Demo</a> <a href="#">[Change]</a>	Rating	Hot
Account Name	Wayne Enterprises <a href="#">[View Hierarchy]</a>	Phone	(408) 693-8098
Parent Account		Fax	
Account Number	123456	Website	
Account Site		Ticker Symbol	
Type	Prospect	Ownership	Public
Industry	Technology	Employees	1,000
Annual Revenue	\$100,000,000	SIC Code	

3. At the call's conclusion, the agent enters the interaction wrap-up code. The wrap-up code informs the agent if further action needs to be taken, such as a call back. Wrap-up codes are configurable to your business, and once a wrap-up code is selected, it's added to the caller's record. Agents can add any details about the interaction to be visible the next time the customer calls, making the record that much more valuable to the customer interaction.



“Transera Call Center App for Salesforce provides visibility into your customer interactions across channels by adding Call Data Records and Agent Activity Records to the Salesforce database for unified reporting. Your unique call wrap-up codes are captured for resolution analysis. You can use all the data captured by Transera to build reports using Salesforce's native reporting tools.”

- TRANSERAINC.COM



## Improve Your Customer Experience

One of the biggest complaints that call center managers hear is that customers have to repeat their issues over and over again to agents. However, with Transera's Salesforce app, the agent can start the discussion in context so the customer doesn't have to repeat information. At the end of the call, the agent specifies the wrap-up code which is defined and configured within Salesforce itself.

Customers are relieved and delighted when an agent can start a conversation with the full context of the customer's previous interactions. A recorded history, easily accessed from within Salesforce, saves time for both the agent and the customer, ensuring that the customer's experience is positive and that he or she will remain loyal to the company.

The wrap-up codes allow agents to know exactly which action, if any, needs to be taken to follow up with the customer and keep the caller satisfied.

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“Optimize your customer interactions at every stage of the customer journey.”

- [TRANSERAINC.COM](https://www.transerainc.com)

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“Arm your agents with real-time caller information—including identities, history, intent—so they know when your best customers are calling and have what they need to be effective. Transera screen pops include the caller's data in Salesforce, phone data and IVR prompt selections.”

- [TRANSERAINC.COM](https://www.transerainc.com)

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## About Us

Transera is a team of tech innovators who are the contact center and statistical performance analytics experts—we've spent decades helping contact centers perform better and we know the pain points and the opportunities inside and out. We've come from the on-premise contact center and telephony world, created the most innovative and enterprise-ready cloud-based virtual contact center infrastructure and married both to the powerhouse possibilities of Big Data analytics.

We work with consumer-facing companies to transform their contact centers into strategic business assets. Our cloud-based software is the only solution that improves contact center performance through statistical analytics that draw out insights which are then used to drive global management and control of interactions. We improve contact center performance through integrations with your existing contact center systems or as a stand-alone solution.

Transera delivers call center management, administration, routing and reporting capabilities from within the Salesforce application itself. Our customer, call and agent data is integrated into the Salesforce database for unified visibility and control. We also add Interactive Voice Response (IVR) and call routing strategies both of which can be driven by the data in Salesforce resulting in better customer experiences.

The Transera Call Center App for Salesforce is easy and inexpensive to implement and cost-effective for a contact center with a handful of agents and will scale as your call center grows. Call centers with thousands of agents rely on Transera contact center applications.

To get started managing your call center using the Transera Call Center App for Salesforce, visit

<http://www.transerainc.com/products/salesforceapp/>

or call [1-800-727-0766](tel:1-800-727-0766)