



## Avaya Solution & Interoperability Test Lab

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# **Application Notes for ConvergeOne Cloud Connect with Avaya Proactive Outreach Manager – Issue 1.0**

### **Abstract**

These Application Notes describe the configuration steps required to integrate the ConvergeOne Cloud Connector with Avaya Proactive Outreach Manager. ConvergeOne Cloud Connector uses the Agent Desktop API of Proactive Outreach Manager (POM) to integrate agent functionality and manage agents using an Agent Desktop.

Readers should pay attention to **Section** Error! Reference source not found., in particular the scope of testing as outlined in **Section** Error! Reference source not found. as well as any observations noted in **Section** Error! Reference source not found., to ensure that their own use cases are adequately covered by this scope and results.

Information in these Application Notes has been obtained through DevConnect compliance testing and additional technical discussions. Testing was conducted via the DevConnect Program at the Avaya Solution and Interoperability Test Lab.

# 1. Introduction

These Application Notes describe the configuration steps required to integrate Cloud Connector with Avaya Proactive Outreach Manager (POM). ConvergeOne Cloud Connector for Avaya POM and Salesforce provides live POM Agent functionality from the Salesforce Customer Relationship Management (CRM) platform.

Cloud Connector uses the Agent Desktop API of Proactive Outreach Manager (POM) to integrate agent functionality and manage agents using an Agent Desktop. Agents log on via Cloud Connector. During the compliance testing, Avaya POM was configured as CCElite to allow communications with Avaya Aura® Communication Manager and Avaya Aura® Application Enablement Service. Avaya POM was installed on Avaya Aura® Experience Portal. Call to and from Experience Portal were routed via a SIP trunk to Avaya Aura® Session Manager.

## 2. General Test Approach and Test Results

The feature tests were performed manually. General test approach was to ensure that the features provided by Agent Desktop API were implanted on Cloud Connector.

DevConnect Compliance Testing is conducted jointly by Avaya and DevConnect members. The jointly-defined test plan focuses on exercising APIs and/or standards-based interfaces pertinent to the interoperability of the tested products and their functionalities. DevConnect Compliance Testing is not intended to substitute full product performance or feature testing performed by DevConnect members, nor is it to be construed as an endorsement by Avaya of the suitability or completeness of a DevConnect member's solution.

### 2.1. Interoperability Compliance Testing

Interoperability compliance testing included feature and serviceability testing. The feature testing focused on the following functionality:

- Agent Login and Logout.
- Agent state: Ready, Not Ready and changing Aux Reason code.
- Nailing the agent and new call notifications.
- Updating contact details.
- Callbacks.
- Adding and Removing contacts from Do Not Call (DNC) lists.
- Call features such as: hold/unhold, send DTMF, Consult, Transfer and Conference

The serviceability testing focused on verifying the ability of the ConvergeOne server and Avaya POM server to recover from adverse conditions, such as power failures and network disconnects.

### 2.2. Test Results

All test cases were executed and verified.

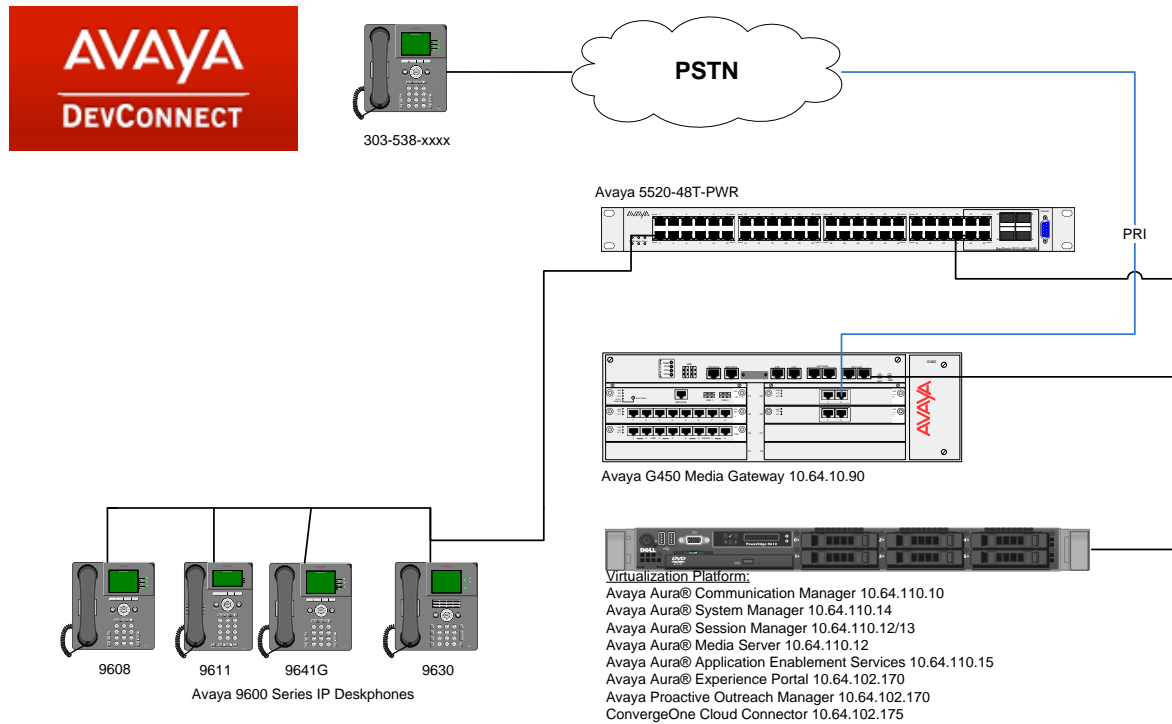
### 2.3. Support

For technical support on the Cloud Connector, contact ConvergeOne via phone, email, or internet.

- **Phone:** 1.888.321.6227
- **Email:** tickets@convergeone.com
- **Web:** <http://www.convergeone.com>

### 3. Reference Configuration

**Figure 1** illustrates the configuration used for testing. In this configuration, Avaya Aura® Experience Portal interfaces with Avaya Aura® Session Manager via SIP. The ConvergeOne Cloud Connector clients were used as agent desktops. ConvergeOne Cloud Connector Server and Clients were deployed as virtual appliances.



**Figure 1:** Configuration with Avaya Proactive Outreach Manager with ConvergeOne

### 3.1. Equipment and Software Validated

The following equipment and software were used for the sample configuration:

Equipment	Software
Avaya Aura® Experience Portal	7.0.2.0.0304
Avaya Proactive Outreach Manager	03.00.03.02.008
Avaya Aura® Application Enablement Services	7.0.0.0.0.13-0
Avaya Aura® System Manager	7.0.0.2.4416
Avaya Aura® Session Manager	7.0.0.0.700007
Avaya Aura® Communication Manager	7.0.1.0.0-FP1
Avaya Aura® Media Server	7.6.0.977
ConvergeOne Cloud Connect	1.3

## 4. Configure Avaya Aura<sup>®</sup> Communication Manager

This section provides the procedures for configuring Communication Manager via the System Access Terminal (SAT).

### 4.1. Administer Hunt Groups

This section provides the Hunt Group configuration for the call center agents. This hunt group will later be configured in Avaya POM.

Agents will log into Hunt Group 1 configured below. Provide a descriptive name and set the **Group Extension** field to a valid extension. Enable the **ACD**, **Queue**, and **Vector** options. This hunt group will be specified in the **Agent LoginIDs** configured in **Section 4.2**.

add hunt-group 1		Page 1 of 4
HUNT GROUP		
Group Number: 1	ACD? y	
Group Name: Skill 1	Queue? y	
Group Extension: 12001	Vector? y	
Group Type: ucd-mia		
TN: 1		
COR: 1	MM Early Answer? n	
Security Code:	Local Agent Preference? n	
ISDN/SIP Caller Display:		
Queue Limit: unlimited		
Calls Warning Threshold:	Port:	
Time Warning Threshold:	Port:	

On Page 2 of the Hunt Group form, enable the **Skill** option.

add hunt-group 1		Page 2 of 4
HUNT GROUP		
Skill? y	Expected Call Handling Time (sec): 180	
AAS? n		
Measured: none		
Supervisor Extension:		
Controlling Adjunct: none		
Multiple Call Handling: none		
Timed ACW Interval (sec):	After Xfer or Held Call Drops? n	

## 4.2. Administer Agent IDs

This section provides the Agent Login IDs for the agents.

Add an **Agent LoginID** for each agent in the call center as shown below. In this configuration, agent login IDs 1101 and 1102 were created for two agents.

add agent-loginID 1101		Page 1 of 2
AGENT LOGINID		
Login ID: 2501	AAS? n	
Name: IP Agent 1	AUDIX? n	
TN: 1	LWC Reception: spe	
COR: 1	LWC Log External Calls? n	
Coverage Path:	AUDIX Name for Messaging:	
Security Code: 1234		
LoginID for ISDN/SIP Display? n		
Password: 123456		
Password (enter again): 123456		
Auto Answer: station		
MIA Across Skills: system		
ACW Agent Considered Idle: system		
Aux Work Reason Code Type: system		
Logout Reason Code Type: system		
Maximum time agent in ACW before logout (sec): system		
Forced Agent Logout Time: :		
WARNING: Agent must log in again before changes take effect		

On Page 2 of the **Agent LoginID** form, set the skill number (SN) to hunt group 1, which is the hunt group (skill) that the agents will log into.

add agent-loginID 1101		Page 2 of 2
AGENT LOGINID		
Direct Agent Skill:	Service Objective? n	
Call Handling Preference: skill-level	Local Call Preference? n	
SN RL SL	SN RL SL	
1: 1 1	16:	
2:	17:	
3:	18:	
4:	19:	
5:	20:	
6:		
7:		
8:		
9:		
10:		
11:		
12:		
13:		
14:		
15:		

### 4.3. Administer Stations

This section provides the extension that agents will log on.

Add a **station** for each extension in the call center as shown below. In this configuration, station 11001 and station 11002 were created.

add station 11001		Page 1 of 5
STATION		
Extension: 11001	Lock Messages? n	BCC: 0
Type: 9630	Security Code: 123456	TN: 1
Port: S00217	Coverage Path 1:	COR: 1
Name: IP Station 1	Coverage Path 2:	COS: 1
	Hunt-to Station:	Tests? y
STATION OPTIONS		
Time of Day Lock Table:		
Loss Group: 19	Personalized Ringing Pattern: 1	
	Message Lamp Ext: 11001	
Speakerphone: 2-way	Mute Button Enabled? y	
Display Language: english	Button Modules: 0	
Survivable GK Node Name:		
Survivable COR: internal	Media Complex Ext:	
Survivable Trunk Dest? y	IP SoftPhone? y	
	IP Video Softphone? n	
	Short/Prefixed Registration Allowed: default	
	Customizable Labels? y	

**Note:** Please note that the configuration of SIP trunk and routing between Communication Manager and Session Manager was preconfigured and is not shown in this document.



## 5. Configure Avaya Aura® Experience Portal and Proactive Outreach Manager

This section covers the administration of Experience Portal. Configuration for Avaya POM is also covered in the section as Avaya POM was co-resident on Experience Portal

Experience Portal is configured via the Experience Portal Manager (EPM) web interface. To access the web interface, enter `http://[IP-Address]/` as the URL in an internet browser, where IP-Address is the IP address of the EPM. Log in using the Administrator user role. The screen shown below is displayed.

**Note:** Some of the screens in this section are shown after the Experience Portal had been configured. Don't forget to save the screen parameters as you configure Avaya Aura® Experience Portal.

**AVAYA** Welcome, admin  
⚠ Last logged in Apr 27, 2016 at 6:01:43 AM MDT

**Avaya Aura® Experience Portal 7.0.2 (ExperiencePortal)** Home Help Logoff

Expand All | Collapse All

You are here: Home

### Avaya Aura® Experience Portal Manager

Avaya Aura® Experience Portal Manager (EPM) is the consolidated web-based application for administering Experience Portal. Through the EPM interface you can configure Experience Portal, check the status of an Experience Portal component, and generate reports related to system operation.

#### Installed Components

**Media Processing Platform**  
Media Processing Platform (MPP) is an Avaya media processing server. When an MPP receives a call from a PBX, it invokes a VoiceXML (or CCXML) application on an application server. It then communicates with ASR and TTS servers as necessary to process the call.

**Email Service**  
Email Service is an Experience Portal feature which provides e-mail capabilities.

**Proactive Outreach Manager**  
Avaya Proactive Outreach Manager (POM) provides a solution for unified, multichannel, inbound and outbound architecture, with the capability to communicate through different channels of interaction, from Short Message Service (SMS) to e-mail to the traditional voice and video.

**Short Message Server**  
Short Message Server (SMS) is an Experience Portal feature which provides SMS capabilities.

**Navigation Menu:**

- ▼ **User Management**
  - Roles
  - Users
  - Login Options
- ▼ **Real-time Monitoring**
  - System Monitor
  - Active Calls
  - Port Distribution
- ▼ **System Maintenance**
  - Audit Log Viewer
  - Trace Viewer
  - Log Viewer
  - Alarm Manager
- ▼ **System Management**
  - Application Server
  - EPM Manager
  - MPP Manager
  - Software Upgrade
  - System Backup
- ▼ **System Configuration**
  - Applications
  - EPM Servers
  - MPP Servers
  - SNMP
  - Speech Servers
  - VoIP Connections
  - Zones
- ▼ **Security**
  - Certificates

## 5.1. Configure a SIP VoIP Connection

To configure an SIP connection, navigate to the **VoIP Connections** page and then click on the **SIP** tab (not shown) and select **Add**. On the **Change SIP Connection** page, configure as follows:

- Set **Enable** to **Yes**
- Set **Proxy Transport** to **TCP**
- For **Proxy Server**:
  - Type in the Session Manager SIP interface IP address in **Address**
  - Type in the Session Manager SIP Port in **Port**
- Type in **Listener Port** to **5060**
- Type in **SIP Domain** to **avaya.com**, as configured in Session Manager.
- Type in a value for **Maximum Simultaneous Calls**, as needed.
- Select **All Calls can be either inbound or outbound**
- 

Name: asm

Enable: ☒ Yes ☐ No

Proxy Transport:

☒ Proxy Servers ☐ DNS SRV Domain

Address	Port	Priority	Weight	
10.64.110.13	5060	0	0	Remove

Additional Proxy Server

Listener Port:

SIP Domain:

P-Asserted-Identity:

Maximum Redirection Attempts:

Consultative Transfer: ☒ INVITE with REPLACES ☐ REFER

SIP Reject Response Code: ☒ ASM (503) ☐ SES (480) ☐ Custom

**SIP Timers**

T1:  milliseconds

T2:  milliseconds

B and F:  milliseconds

**Call Capacity**

Maximum Simultaneous Calls:

☒ All Calls can be either inbound or outbound

☐ Configure number of inbound and outbound calls allowed

**Save** **Apply** **Cancel** **Help**

## 5.2. Verify Applications

Note that the applications needed for Avaya POM were configured during Avaya POM installation. To view the list of application, navigate to **System Configuration → Applications**.

**AVAYA**

Welcome, epadmi  
Last logged in Jun 2, 2016 at 11:37:49 AM PC

Avaya Aura® Experience Portal 7.0.2 (ExperiencePortal)

Home Help Logoff

Expand All Collapse All

User Management

- Roles
- Users
- Login Options

Real-time Monitoring

- System Monitor
- Active Calls
- Port Distribution

System Maintenance

- Audit Log Viewer
- Trace Viewer
- Log Viewer
- Alarm Manager

System Management

- Application Server
- EPM Manager
- MPP Manager
- Software Upgrade
- System Backup

System Configuration

- Applications
- EPM Servers
- MPP Servers
- SNMP
- Speech Servers
- VoIP Connections
- Zones

Security

- Certificates
- Licensing

Reports

- Standard
- Custom
- Scheduled

Multi-Media Configuration

- Email
- SMS

You are here: Home > System Configuration > Applications

### Applications

This page displays the applications that are currently deployed on the Experience Portal system.

<input type="checkbox"/>	Name	Enable	Type	URI	Launch	ASR	TTS
<input type="checkbox"/>	<a href="#">AvayaPOMAgent</a>	Yes	POM:Application	http://10.64.102.170:7080/AvayaPOMAgent/Start	Outbound	No ASR	No TTS
<input type="checkbox"/>	<a href="#">AvayaPOMAnnouncement</a>	Yes	POM:Application	http://10.64.102.170:7080/AvayaPOMAnnouncement/Start	Outbound	No ASR	No TTS
<input type="checkbox"/>	<a href="#">AvayaPOMEmail</a>	Yes	Email	http://10.64.102.170:7080/AvayaPOMEmail/Start	Inbound Default	No ASR	No TTS
<input type="checkbox"/>	<a href="#">AvayaPOMNotifier</a>	Yes	POM:Application	http://10.64.102.170:7080/AvayaPOMNotifier/Start	Outbound	No ASR	No TTS
<input type="checkbox"/>	<a href="#">AvayaPOMSMS</a>	Yes	SMS	http://10.64.102.170:7080/AvayaPOMSMS/Start	Inbound Default	No ASR	No TTS
<input type="checkbox"/>	<a href="#">Nailer</a>	Yes	POM:Nailer	https://10.64.102.170:7443/Nailer/ccxml/start.jsp	Outbound	No ASR	No TTS
<input type="checkbox"/>	<a href="#">PomDriverApp</a>	Yes	POM:Driver	https://10.64.102.170:7443/PomDriverApp/ccxml/start.jsp	Outbound	No ASR	English(USA) en-US Jennifer F
<input type="checkbox"/>	<a href="#">sample_app</a>	Yes	VoiceXML	http://10.64.102.170/ExperiencePortalTest/intro.vxml	11301	English(USA) en-US	English(USA) en-US Jennifer F

Add

Delete

Clear MPP Cache

Help

### 5.3. Configure Avaya POM

When Avaya POM is installed on Experience Portal, a sub menu is added to EPM. On the left pane, select **POM Home** under **POM**. All configurations for Avaya POM are performed from this page, **POM Home**.

The screenshot displays the Avaya Aura Experience Portal 7.0.2 (ExperiencePortal) interface. The top navigation bar includes the Avaya logo, a welcome message for 'epadn', and the last login time 'Last logged in Jun 2, 2016 at 11:37:49 AM P'. The main navigation menu on the left lists various system management and monitoring options, with 'POM' (Proactive Outreach Manager) highlighted under 'System Configuration'. The main content area shows the 'Proactive Outreach Manager 3.0' page. It includes a 'POM Home' tab, a 'Campaigns' dropdown, and a 'Contacts' dropdown. The page content describes the Proactive Outreach Manager as an application for interactive outbound Voice, SMS, and E-mail notifications. It also features a 'Customize View' section with a 'Help' link. The main content area is divided into four sections: 'Campaigns', 'Contact List', 'Agents', and 'Favorites'. The 'Campaigns' section shows statistics for campaigns started today and in running state (0), campaigns in completed state for today (7), campaigns started today and in paused state (0), and campaigns scheduled today (0). The 'Contact List' section shows statistics for contact list updates started today and in running state (0), contact list updates completed today (0), contact list updates started today and in paused state (0), and contact list updates scheduled today (0). The 'Agents' section shows 'Agent Details' (0). The 'Favorites' section lists various favorites including 'Agent Address Book', 'Contact Lists', 'DNC Lists', 'Completion Codes', 'Campaign Restrictions', and 'POM Settings'.

**AVAYA** Welcome, epadn  
Last logged in Jun 2, 2016 at 11:37:49 AM P

**Avaya Aura® Experience Portal 7.0.2 (ExperiencePortal)** Home ? Help Logof

Expand All | Collapse All

**Proactive Outreach Manager 3.0** POM Home Campaigns Contacts

**User Management**  
Roles  
Users  
Login Options

**Real-time Monitoring**  
System Monitor  
Active Calls  
Port Distribution

**System Maintenance**  
Audit Log Viewer  
Trace Viewer  
Log Viewer  
Alarm Manager

**System Management**  
Application Server  
EPM Manager  
MPP Manager  
Software Upgrade  
System Backup

**System Configuration**  
Applications  
EPM Servers  
MPP Servers  
SNMP  
Speech Servers  
VoIP Connections  
Zones

**Security**  
Certificates  
Licensing

**Reports**  
Standard  
Custom  
Scheduled

**Multi-Media Configuration**  
Email  
SMS

**POM**  
POM Home  
POM Monitor

**Proactive Outreach Manager 3.0**

**POM Home** Campaigns Configuration

**Refresh**  
Last poll: 06/15/2016 01:12:50 PM

Proactive Outreach Manager is an application for interactive outbound Voice, SMS and E-mail notifications. With Proactive Outreach Manager, you can easily design and deploy Campaigns that deliver the right information and service over the right media from the right resource at the right time.

Customize View: [ ? ] Help: [ ? ]

**Campaigns**

- 0 Campaign(s) started today and in running state.
- 7 Campaign(s) in completed state for today.
- 0 Campaign(s) started today and in paused state.
- 0 Campaign(s) scheduled today.

**Contact List**

- 0 Contact list(s) updates started today and running state.
- 0 Contact list(s) updates completed today.
- 0 Contact list(s) updates started today and paused state.
- 0 Contact list(s) updates scheduled today.

**Agents**

- 0 Agent Details

**Favorites**

- Agent Address Book
- Contact Lists
- DNC Lists
- Completion Codes
- Campaign Restrictions
- POM Settings

## 5.4. Add POM Server

From **POM Home**, hover over **Configurations** and select **POM Servers**; click **Add** to add a Avaya POM server. On the **Add POM Server** page, type in a name in **POM Server Name** and type in the Avaya POM IP Address in **POM Server IP Address** and Select **Continue**. Note that since Avaya POM was installed on the same server as Experience Portal, the IP Address of Experience portal was used.

The screenshot displays the Avaya Aura Experience Portal 7.0.2 (ExperiencePortal) interface. The top header features the Avaya logo on the left, the user name 'Welcome, epadmin' on the right, and a warning icon with the text 'Last logged in Jun 24, 2016 at 1:46:40 PM PDT'. Below the header is a red navigation bar with 'Avaya Aura® Experience Portal 7.0.2 (ExperiencePortal)' on the left and 'Home', 'Help', and 'Logoff' on the right. A sidebar on the left contains a menu with categories: 'User Management' (Roles, Users, Login Options), 'Real-time Monitoring' (System Monitor, Active Calls, Port Distribution), 'System Maintenance' (Audit Log Viewer, Trace Viewer, Log Viewer, Alarm Manager), and 'System Management' (Application Server, EPM Manager). The main content area is titled 'Proactive Outreach Manager 3.0' and 'POM Home Configurations'. The 'Add POM Server' page is shown, with the instruction 'Use this page to add a new POM server.' Below this are two input fields: 'POM Server Name' with the value 'pom' and 'POM Server IP Address' with the value '10.64.102.170'. At the bottom are three buttons: 'Continue', 'Cancel', and 'Help'.



On the **Edit POM Server** page check the box for **Trust this certificate** and select **Save**.

## 5.5. Configure POM Server

Outbound settings will need to be configured for Avaya POM to place outbound calls. Navigate to **Configurations → POM Servers → Outbound Setting** (not shown). On the **Voice Server Page**, click on the name of Voice Server; EPM, in this case.

On the **Edit Voice Server** page, type in the **User Name** and **Password**, as configured for Experience Portal. This username and password is obtained from the **Outcall** section of **System Configuration** → **EPM Server** → **EPM Settings**.

The screenshot displays the Avaya Aura Experience Portal 7.0.2 (ExperiencePortal) interface. The top navigation bar includes the Avaya logo, a welcome message for 'epadmin', and the last login time: 'Last logged in Jun 2, 2016 at 11:37:49 AM PDT'. The main navigation bar features links for Home, Help, and Logoff, along with a red banner for 'Avaya Aura® Experience Portal 7.0.2 (ExperiencePortal)'. The left sidebar contains a tree view with categories: User Management (Roles, Users, Login Options), Real-time Monitoring (System Monitor, Active Calls, Port Distribution), System Maintenance (Audit Log Viewer, Trace Viewer, Log Viewer, Alarm Manager), System Management (Application Server, EPM Manager, MPP Manager, Software Upgrade, System Backup), and System Configuration (Applications). The main content area is titled 'Proactive Outreach Manager 3.0' and includes links for POM Home and Configurations. The 'Edit Voice Server' page is active, showing a form with the following fields: Name (EPM), IP Address (aaep), User Name (\*admin), and Password (\*). Below the form are buttons for Save, Cancel, and Help.

Welcome, epadmin  
Last logged in Jun 2, 2016 at 11:37:49 AM PDT

Avaya Aura® Experience Portal 7.0.2 (ExperiencePortal)

Home ? Help Logoff

Expand All | Collapse All

Proactive Outreach Manager 3.0

POM Home Configurations

Campaigns Contacts

**Edit Voice Server**

This page allows you to modify Voice Server for outbound calling.

Name EPM

IP Address aaep

User Name \*admin

Password \*

Save Cancel Help

## 5.6. Configure CTI

From **POM Home**, navigate to **Configurations** → **CC Elite Configurations** and select **Add CTI Detail** under **CTI Configuration** (not shown). On the **Add CTI Detail** page, configure as follows:

- Type in a name in **CTI group name**.
- Type in Communication Manager IP Address in **CM IP address**.
- Type in username and password in **CM Login** and **CM Password**.
- Type in AES IP Address in **AES IP address**.
- From the **CTI group role** drop down menu, select **Active**.


The screenshot shows the Avaya Aura Experience Portal 7.0.2 (ExperiencePortal) interface. The top header displays the Avaya logo and the user 'epadmin' with a welcome message and a timestamp. The sidebar on the left contains a tree view of navigation links, including 'User Management', 'Real-time Monitoring', 'System Maintenance', 'System Management', 'System Configuration', and 'Security'. The main content area is titled 'Edit CTI Detail' and includes a description: 'This page allows editing of existing CTI details.' Below this is a form titled 'Edit CTI Configuration' with the following fields:

* CTI group name	aes
* CM IP address	10.64.110.10
* CM login	init
* CM password	*****
* AES IP address	10.64.110.15
CTI group role	Active

At the bottom of the form are three buttons: 'Save', 'Cancel', and 'Help'.



On the **Configure CTI setup details**, **CMS setup details** and **POM Skills** page, select **Add Skill**. Type in the skill as configured in **Section 4.1** for **CCElite Skill Number**, type in a name in **POM Skill Name** and select **outbound** from the **Skill Type** drop down menu.



Welcome, eadmin  
 Last logged in Jun 2, 2016 at 11:37:49 AM PDT

Avaya Aura® Experience Portal 7.0.2 (ExperiencePortal)
 
[Home](#)
[Help](#)
[Logoff](#)

Expand All | Collapse All  

- ▼ **User Management**
  - Roles
  - Users
  - Login Options
- ▼ **Real-time Monitoring**
  - System Monitor
  - Active Calls
  - Port Distribution
- ▼ **System Maintenance**
  - Audit Log Viewer
  - Trace Viewer
  - Log Viewer
  - Alarm Manager
- ▼ **System Management**
  - Application Server
  - EPM Manager
  - MPP Manager
  - Software Upgrade
  - System Backup
- ▼ **System Configuration**
  - Applications
  - EPM Servers
  - MPP Servers
  - SNMP
  - Speech Servers
  - VoIP Connections
  - Zones
- ▼ **Security**
  - Certificates
  - Licensing
- ▼ **Reports**
  - Standard
  - Custom
  - Scheduled
- ▼ **Multi-Media Configuration**
  - Email
  - SMS
- ▼ **POM**
  - POM Home
  - POM Monitor

Proactive Outreach Manager 3.0
POM Home  
Configurations ▼
Campaigns ▼
Contacts ▼

### Create POM Skills

This page allows creation of skills in POM database and associating it with CC Elite skill. For skill type "Outbound", "CC Elite Skill

CC Elite Skill Number	POM Skill Name	Skill Type	Parameter to Monitor for B
<input type="text" value="1"/>	<input type="text" value="Skill"/>	<input type="text" value="Outbound"/>	<input type="text" value="Select only for Inbound"/>
<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="Select"/>	<input type="text" value="Select only for Inbound"/>
<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="Select"/>	<input type="text" value="Select only for Inbound"/>
<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="Select"/>	<input type="text" value="Select only for Inbound"/>
<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="Select"/>	<input type="text" value="Select only for Inbound"/>
<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="Select"/>	<input type="text" value="Select only for Inbound"/>
<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="Select"/>	<input type="text" value="Select only for Inbound"/>
<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="Select"/>	<input type="text" value="Select only for Inbound"/>
<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="Select"/>	<input type="text" value="Select only for Inbound"/>
<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="Select"/>	<input type="text" value="Select only for Inbound"/>

Add more rows (maximum upto 10 in one operation)

Add

Save
Cancel
Help

## 5.7. Configure Contacts

From **POM Home**, navigate to **Contacts** → **Contact Lists** and select **Add**. Type in a name in **Name** and brief **Description** and select **Save**.

### Add New Contact List

This page allows you to add new Contact List.

Name

contacts

Description

Save

Cancel

Help

On the next page, select **Upload Contacts now. Browse..** to the location of the .csv file for the contacts and select **Upload**.

Upload Contacts

File to upload:  No file selected.

Advanced Options

Empty Contact List before import

☐

Automatically update time zone for phone numbers

☐

Check phone numbers for reject patterns

☐

Check phone numbers for phone formats rule

☐

Check phone numbers/E-Mails for DNC

☐

On duplicate record found

Upload

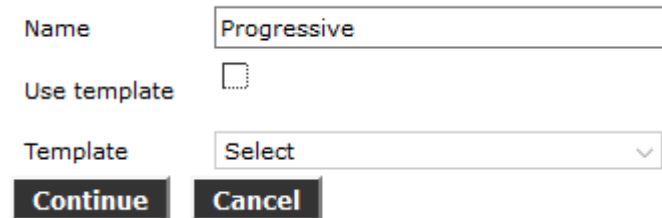
Cancel

Help

## 5.8. Configure Campaign

### 5.8.1. Configure Campaign Strategy

From **POM Home**, navigate to **Campaigns** → **Campaign Strategies** and select **Add**. Type in a name in **Name** field and select **Continue**.



The screenshot shows a web form for configuring a campaign strategy. It has three input fields: 'Name' with the value 'Progressive', 'Use template' with an unchecked checkbox, and 'Template' with a dropdown menu showing 'Select'. At the bottom are two buttons: 'Continue' and 'Cancel'.

**Campaign Strategy Editor** will open as a pop up. Configure a strategy as needed. Below is an example of the strategy configured during compliance testing.

```
<?xml version="1.0" encoding="UTF-8"?>
<tns:AvayaPIMContactStrategy
xsi:schemaLocation="http://www.avaya.com/ContactStrategy ContactStrategy.xsd
" xmlns:tns="http://www.avaya.com/ContactStrategy"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <Handler foundError="false" state="initial">
    <action CallPacingType="Progressive" DriverApp="PomDriverApp"
EnhancedCCA="ON" HoldApp="AvayaPOMAnnouncement" NailerApp="Nailer"
NuisanceApp="AvayaPOMAnnouncement" OnMediaServerFailure="retry" acwTime="5"
allocationType="1" defaultCompCode="all" foundError="false"
guardTime="Disable" maxAgents="3" minAgents="1" outboundSkill="1"
outboundSkillName="Skill 1" overDialRatio="1" priority="5" type="call">
      <address foundError="false" isBranch="false" weekDaysOnly="false">
        <ContactAttribute>phoneNumber1</ContactAttribute>
      </address>
      <resultprocessors foundError="false" nextState="done">
        <result foundError="false" nextState="wait" value="Answer_Human">
          <Agent campaignCallBack="Enable" foundError="false"
generalCallBack="Enable" prefAgentCallback="Enable"/>
        </result>
      </resultprocessors>
    </action>
  </Handler>
</tns:AvayaPIMContactStrategy>
```

### 5.8.2. Configure Campaign Manager

From **POM Home**, navigate to **Campaigns** → **Campaign Manager** and select **Add**. Type in a name in **Name** field and select **Continue**.

**Add a Campaign** x

### Create Campaign

You can start creating a Campaign either by using already created Campaign as template or create new altogether.

Name

☒ New Campaign  
☐ Copy existing Campaign

**Continue** **Cancel** **Help**

On the **Define Campaign** page, select the strategy added in previous section for **Campaign Strategy**. Select the contact list from **Section 5.7** and select **Finish**.

**AVAYA** Welcome, epadm  
Last logged in Jun 2, 2016 at 11:37:49 AM PT

Avaya Aura® Experience Portal 7.0.2 (ExperiencePortal) Home ? Help Logoff

Expand All | Collapse All

**Proactive Outreach Manager 3.0** POM Home Configurations

**Define Campaign**

Give a name to Campaign, define its type, select the Campaign Strategy and one or more Contact List to be used with the Campaign. Click on the "Finish" button to complete the Campaign creation process. To change optional parameters, click the "Next" button.

**Name and Description**

Progressive

**Campaign Strategy**

Select a Campaign Strategy from the following list to be used in the Campaign. Click on the icons to create a new Campaign Strategy, view details of a selected Strategy or refresh the current list.

Progressive

**Campaign type**

☒ Finite ☐ Infinite

☐ Do not associate any Contact List at start

**Contact List**

From the following list select one or more Contact Lists to be used with this Campaign. Click on the icons next to the list to create a new Contact List or refresh the current list.

contacts(Default)  
contact(Default)

Cancel Next Finish Help

## 5.9. Start POM Server

One POM Server is added, start it by navigating to **Configurations → POM Servers → POM Manager**. On the **POM Manager** page, check the box for the Avaya POM server and select **Start**.

The screenshot displays the Avaya Aura Experience Portal 7.0.2 (ExperiencePortal) interface. The top navigation bar includes the Avaya logo, user information (Welcome, eadmin), and login/logout options. The left sidebar contains a menu with categories like User Management, Real-time Monitoring, System Maintenance, and System Management. The main content area is titled 'POM Manager' and includes a 'Refresh' button. Below the title, a message states: 'Use this page to manage the POM servers connected to this EPM.' A table lists the POM servers, with one entry 'pom' at IP 10.64.102.170, showing STOPPED status for Campaign Manager, Campaign Director, Agent Manager, and ActiveMQ. The 'Start' button is highlighted for the 'pom' server.

	POM Server Name	Host Address	Campaign Manager Status	Campaign Director Status	Agent Manager Status	ActiveMQ Status	P
<input checked="" type="checkbox"/>	pom	10.64.102.170	STOPPED	STOPPED	STOPPED	STOPPED	0

Buttons: Start, Stop, Help

## 6. Configure Session Manager

Configuration for Session manager is performed via System Manager. From a web browser type in [https://\[IP-Address\]/SMGR](https://[IP-Address]/SMGR) where IP-Address is the IP Address of System Manager. Log in using appropriate credentials.

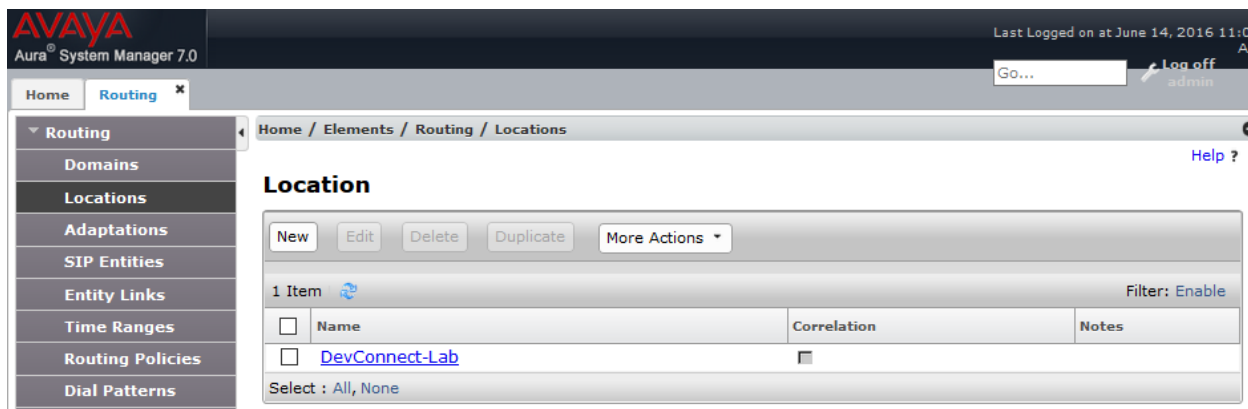
Please note that configuration of each item is not shown in detail. In the following sections, screen captures of the configured items during compliance testing are shown. For details steps on configuration of each item, refer to Document [3].

### 6.1. Configure Domain

Once logged in, select **Routing** (not shown). On the left pane select **Domains**. Click **New** to add a new domain. For compliance testing, domain of avaya.com was added.

## 6.2. Configure Locations

From the left pane, select **Location**. To add a new location, select **New**. For compliance testing, location of DevConnect-Lab was added.



AVAYA  
Aura® System Manager 7.0

Last Logged on at June 14, 2016 11:06 AM

Home Routing

Home / Elements / Routing / Locations

**Location**

New Edit Delete Duplicate More Actions

1 Item Filter: Enable

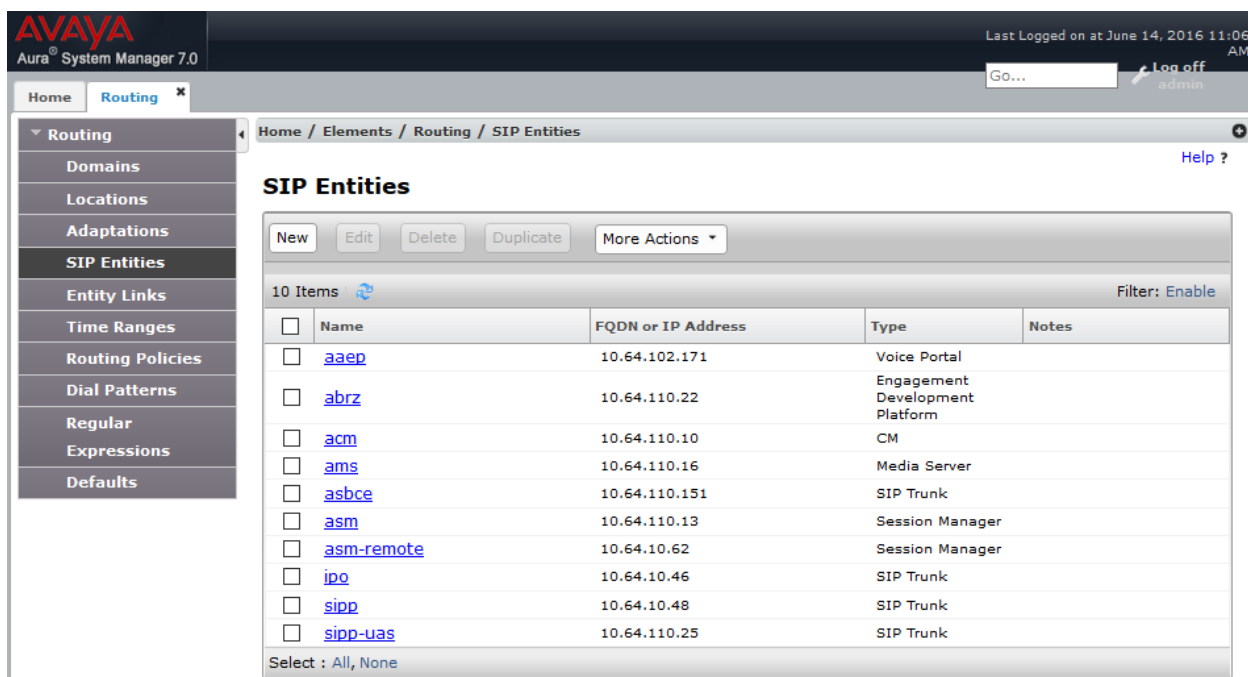
<input type="checkbox"/>	Name	Correlation	Notes
<input type="checkbox"/>	<a href="#">DevConnect-Lab</a>		

Select : All, None

## 6.3. Configure SIP Entities

From the left pane, select **SIP Entities**. To add a new SIP Entity, select **New**. For compliance testing, three SIP Entities were added as shown below.

- aaep: Experience Portal SIP Entity
- asm: Session Manager SIP Entity
- acm: Communication Manager SIP Entity



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Aura® System Manager 7.0

Last Logged on at June 14, 2016 11:06 AM

Home Routing

Home / Elements / Routing / SIP Entities

**SIP Entities**

New Edit Delete Duplicate More Actions

10 Items Filter: Enable

<input type="checkbox"/>	Name	FQDN or IP Address	Type	Notes
<input type="checkbox"/>	<a href="#">aaep</a>	10.64.102.171	Voice Portal	
<input type="checkbox"/>	<a href="#">abrz</a>	10.64.110.22	Engagement Development Platform	
<input type="checkbox"/>	<a href="#">acm</a>	10.64.110.10	CM	
<input type="checkbox"/>	<a href="#">ams</a>	10.64.110.16	Media Server	
<input type="checkbox"/>	<a href="#">asbce</a>	10.64.110.151	SIP Trunk	
<input type="checkbox"/>	<a href="#">asm</a>	10.64.110.13	Session Manager	
<input type="checkbox"/>	<a href="#">asm-remote</a>	10.64.10.62	Session Manager	
<input type="checkbox"/>	<a href="#">ipo</a>	10.64.10.46	SIP Trunk	
<input type="checkbox"/>	<a href="#">sipp</a>	10.64.10.48	SIP Trunk	
<input type="checkbox"/>	<a href="#">sipp-uas</a>	10.64.110.25	SIP Trunk	

Select : All, None



## 6.4. Configure Entity Links

For each SIP Entity, with the exception of Session Manager, an entity link needs to be added. On the left pane, select **Entity Links**. To add a new entity link, select **New**. For compliance testing two entity link, one for Communication Manager and another for Experience Portal, were added.

Entity Links

<input type="checkbox"/>	Name	SIP Entity 1	Protocol	Port	SIP Entity 2	DNS Override	Port	Connection Policy	Deny New Service	Notes
<input type="checkbox"/>	<a href="#">asm_911etc-1_5060_TCP</a>	asm	TCP	5060	asbce	<input type="checkbox"/>	5060	trusted	<input type="checkbox"/>	
<input type="checkbox"/>	<a href="#">asm_aaep_5060_TCP</a>	asm	TCP	5060	aaep	<input type="checkbox"/>	5060	trusted	<input type="checkbox"/>	
<input type="checkbox"/>	<a href="#">asm_abrz_5060_TCP</a>	asm	TCP	5060	abrz	<input type="checkbox"/>	5060	trusted	<input type="checkbox"/>	
<input type="checkbox"/>	<a href="#">asm_abrz_5061_TLS</a>	asm	TLS	5061	abrz	<input type="checkbox"/>	5061	trusted	<input type="checkbox"/>	
<input type="checkbox"/>	<a href="#">asm_acm_5061_TLS</a>	asm	TLS	5061	acm	<input type="checkbox"/>	5061	trusted	<input type="checkbox"/>	
<input type="checkbox"/>	<a href="#">asm_ams_5060_TCP</a>	asm	TCP	5060	ams	<input type="checkbox"/>	5060	trusted	<input type="checkbox"/>	
<input type="checkbox"/>	<a href="#">asm_asm-remote_5060_TCP</a>	asm	TCP	5060	asm-remote	<input type="checkbox"/>	5060	trusted	<input type="checkbox"/>	
<input type="checkbox"/>	<a href="#">asm_ipo_5060_UDP</a>	asm	UDP	5060	ipo	<input type="checkbox"/>	5060	trusted	<input type="checkbox"/>	
<input type="checkbox"/>	<a href="#">asm_sipp_5060_TCP</a>	asm	TCP	5060	sipp	<input type="checkbox"/>	5060	trusted	<input type="checkbox"/>	
<input type="checkbox"/>	<a href="#">asm_sipp_5060_UDP</a>	asm	UDP	5060	sipp-uas	<input type="checkbox"/>	5060	trusted	<input type="checkbox"/>	

Select : All, None

## 6.5. Configure Time Ranges

On the left pane, select **Time Ranges**. To add a new time range, select **New**. For compliance testing, time range of 24/7 was added.

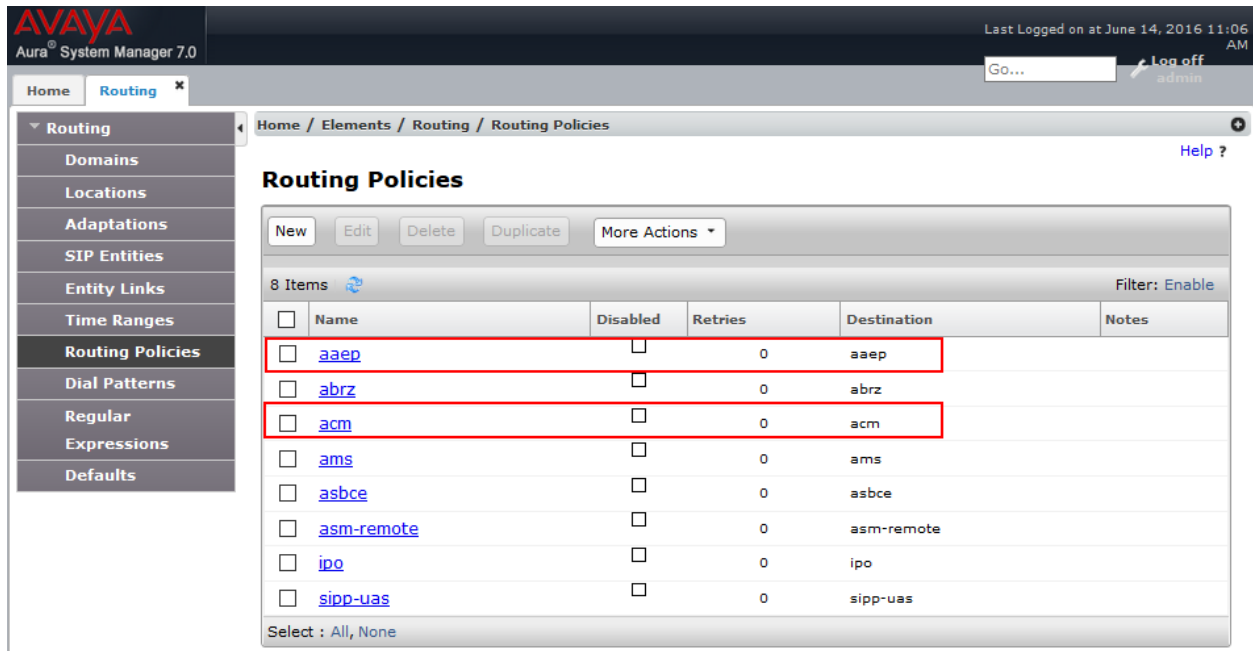
Time Ranges

<input type="checkbox"/>	Name	Mo	Tu	We	Th	Fr	Sa	Su	Start Time	End Time	Notes
<input type="checkbox"/>	<a href="#">24/7</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00:00	23:59	

Select : All, None

## 6.6. Configure Routing Policies

On the left pane, select **Routing Policies**. To add a new routing policy, select **New**. For compliance testing, two routing policies were added, one for Communication Manager and another for Experience Portal.



The screenshot shows the Avaya Aura System Manager 7.0 interface. The left sidebar contains a navigation menu with the following items: Home, Routing, Domains, Locations, Adaptations, SIP Entities, Entity Links, Time Ranges, Routing Policies (selected), Dial Patterns, Regular Expressions, and Defaults. The main content area is titled 'Routing Policies' and shows a table of 8 items. The table has columns for Name, Disabled, Retries, Destination, and Notes. The first three rows are highlighted with red boxes: 'aaep', 'abrz', and 'acm'. The 'aaep' and 'acm' rows are also highlighted with red boxes. The 'aaep' row has a checkbox in the 'Disabled' column. The 'aaep' row has a value of 0 in the 'Retries' column. The 'aaep' row has a value of 'aaep' in the 'Destination' column. The 'aaep' row has an empty 'Notes' column. The 'aaep' row has a 'New' button next to it. The 'aaep' row has an 'Edit' button next to it. The 'aaep' row has a 'Delete' button next to it. The 'aaep' row has a 'Duplicate' button next to it. The 'aaep' row has a 'More Actions' dropdown menu next to it. The 'aaep' row has a 'Filter: Enable' button next to it. The 'aaep' row has a 'Select : All, None' button next to it.

	Name	Disabled	Retries	Destination	Notes
<input type="checkbox"/>	<a href="#">aaep</a>	<input type="checkbox"/>	0	aaep	
<input type="checkbox"/>	<a href="#">abrz</a>	<input type="checkbox"/>	0	abrz	
<input type="checkbox"/>	<a href="#">acm</a>	<input type="checkbox"/>	0	acm	
<input type="checkbox"/>	<a href="#">ams</a>	<input type="checkbox"/>	0	ams	
<input type="checkbox"/>	<a href="#">asbce</a>	<input type="checkbox"/>	0	asbce	
<input type="checkbox"/>	<a href="#">asm-remote</a>	<input type="checkbox"/>	0	asm-remote	
<input type="checkbox"/>	<a href="#">ipo</a>	<input type="checkbox"/>	0	ipo	
<input type="checkbox"/>	<a href="#">sipp-uas</a>	<input type="checkbox"/>	0	sipp-uas	

## 6.7. Configure Dial Patterns

On the left pane, select **Dial Patterns**. To add a new dial pattern, select **New**. For compliance testing three dial patterns were added:

- 110: All calls starting with pattern 110 with either 4 or 5 digits were routed to communication manager. For compliance test, Experience Portal routed calls to extensions 110xx, which were routed to Communication Manager
- 113: All calls starting with pattern 113 and 5 digits long were routed to Experience Portal
- 9: All calls starting with 9 and either 11 or 12 digits long were routed to Communication Manager. This was used for routing calls out to PSTN via Communication Manager.

AVAYA  
Aura® System Manager 7.0

Last Logged on at June 14, 2016 11:06 AM

Go... Log off admin

Home Routing

Home / Elements / Routing / Dial Patterns

### Dial Patterns

New Edit Delete Duplicate More Actions

7 Items Filter: Enable

<input type="checkbox"/>	Pattern	Min	Max	Emergency Call	Emergency Type	Emergency Priority	SIP Domain	Notes
<input type="checkbox"/>	<a href="#">110</a>	4	5	<input type="checkbox"/>			-ALL-	
<input type="checkbox"/>	<a href="#">11120</a>	5	5	<input type="checkbox"/>			-ALL-	
<input type="checkbox"/>	<a href="#">112</a>	5	5	<input type="checkbox"/>			-ALL-	
<input type="checkbox"/>	<a href="#">113</a>	5	5	<input type="checkbox"/>			-ALL-	
<input type="checkbox"/>	<a href="#">115</a>	5	5	<input type="checkbox"/>			-ALL-	
<input type="checkbox"/>	<a href="#">9</a>	11	12	<input type="checkbox"/>			-ALL-	
<input type="checkbox"/>	<a href="#">933</a>	3	3	<input checked="" type="checkbox"/>	Police	1	-ALL-	

Select : All, None

## 7. Configure ConvergeOne Cloud Connector

This section provides the procedures for configuring ConvergeOne Cloud Connector. The procedures include the following areas:

- Administer Server Details
- Administer Reason Codes
- Administer Screen Pop Data
- Administer Display Fields
- Administer Call Log Data and Customizations
- Administer License
- Restart Service
- Administer Call Center

The configuration of Cloud Connector is typically performed by the ConvergeOne deployment team. **Note:** The procedural steps are presented in these Application Notes for informational purposes.

### 7.1. Administer Server Details

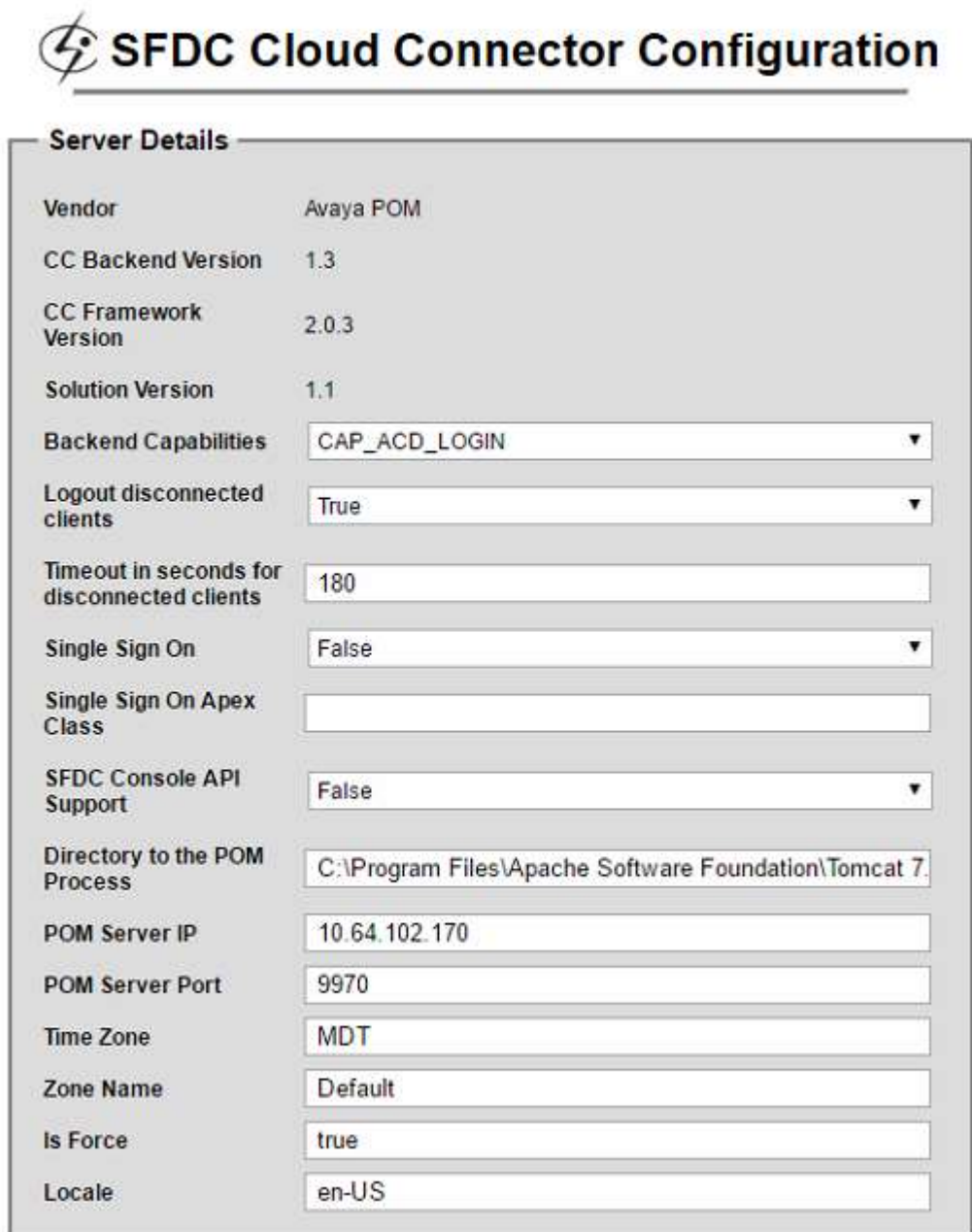
Access the ConvergeOne Cloud Connector web-based interface by using the URL “http://ip-address:8080/ CloudConnectorServer” in an Internet browser window, where “ip-address” is the IP address of the Cloud Connector server. The **Cloud Connector** screen below is displayed. Click **Configuration**, and log in using the appropriate credentials in the subsequent screen (not shown).



The **SFDC Cloud Connector Configuration** screen is displayed. In the **Server Details** sub-section, enter the following values for the specified fields, and retain the default values for the remaining fields.

- **POM Server IP :** The server IP from **Section 5.3**.
- **POM Server Port:** The Server port from **Section 5.3**.

The other configuration items are explained in the detail table.



The screenshot shows the 'SFDC Cloud Connector Configuration' window. The 'Server Details' tab is selected. The configuration fields are as follows:

Field	Value
Vendor	Avaya POM
CC Backend Version	1.3
CC Framework Version	2.0.3
Solution Version	1.1
Backend Capabilities	CAP_ACD_LOGIN
Logout disconnected clients	True
Timeout in seconds for disconnected clients	180
Single Sign On	False
Single Sign On Apex Class	
SFDC Console API Support	False
Directory to the POM Process	C:\Program Files\Apache Software Foundation\Tomcat 7.
POM Server IP	10.64.102.170
POM Server Port	9970
Time Zone	MDT
Zone Name	Default
Is Force	true
Locale	en-US

Field Name	Description	Sample Value	Format
Backend Capabilities	Default value is "CAP_ACD_LOGIN" This is the only mode supported.	CAP_ACD_LOGIN	String
Logout Disconnected Clients	When the client timeout reaches, the Cloud connector Server will disconnect the user connection from the Avaya. If the Cloud Connector needs to logout the user from Avaya, then this needs to be turned on.	True	True/False
Timeout in seconds for disconnected clients	If the Client UI disappears without following the logout procedure, then this timeout will be used to determine to log the agent out automatically or disconnect the session from the Avaya.	180	Integer (in Seconds )
Single Sign On	To support Single sign on from the Salesforce login or not. If enabled, the Connector will log the agent in to the CTI platform, when the user logs into Salesforce.	True	True/False
Single Sign On Apex Class	Apex class used for finding the right user information for logging in the agent automatically.	String	String
SFDC Console API Support	If enabled salesforce cti events will be fired for the different call states.	True	True/False
Directory to the POM Process	The directory where the POM executable is installed	C:\Debug\CTIWrapper.exe	String
POM ServerIP	IP address of the POM server	10.10.0.99	String
POM Server Port	Port of the POM server to be used for connections	9970	String
TimeZone	Time zone to be used for POM callbacks	America/Denver	String
Zone Name	The zone configured in POM management for the environment	Default	String
Is Force	Rather or not an existing agent should be forced out and login by subsequent users.	True	True/False
Local	POM Local setting to be used at login	En-US	String

## 7.2. Administer Reason Codes

Scroll down to the **Reason Codes** sub-sections. For **Enable NotReady Reason Codes**, select “True” from the drop-down list.

Preview call accept timer and also **walk away** (No of abandoned calls before set Agent to Not ready) can be set here.

**Reason Codes**

Default Not Ready Reason Code

0

Enable NotReady Reason Codes

True

Not Ready Reason Codes

Available Attributes

Selected Attributes

1:Break  
2:Meeting  
3:Admin Work

\*Hold down the CTRL key to select more than one option at a time

Field Name

Field Value

Add

Exception Reason Code

0

Time Before Auto Reject The Preview Call

60

No of Abandoned Call before Set Agent to Not Ready

0

### 7.3. Administer Screen Pop Data

Scroll down to the Screen Pop Data sub-sections. Follow [5] to configure the attributes used for screen pop, and for advanced screen pop upon no match. The screenshot below shows the settings used in the compliance testing.

**Screen Pop Data**

**Available Attributes**

**Selected Attributes**

phoneNumber:DST\_ADDR  
DefaultNumber:DefaultNumber  
Phone 1:Phone 1  
Phone 2:Phone 2

\*Hold down the CTRL key to select more than one option at a time

**Field Name**

**Field Value**

**Add**

**Incoming Call ScreenPop Behavior** searchandscreenpop

**Screenpop Event** established

**Advanced Screen Pop Enabled** False

**Advanced Screenpop Search Apex Class** SimpliCTIScrpopRuleManager

**Advanced Screenpop Search Method** search

**Advanced Screenpop - MultiMatch Page** apex/AdvancedScreenPopClient

**Advanced Screenpop - No Match Page**

**Available Attributes**

NewOppurunity:006/e  
NewAccount:001/e  
SearchPage:\_ui/search/ui/Unifi  
NewContact:003/e  
NewCase:500/e  
NewLead:00Q/e

**Selected Attributes**

\*Hold down the CTRL key to select more than one option at a time

**Field Name**

**Field Value**

**Add**

**Bookmarked** None



## 7.4. Administer Display Fields

Scroll down to the **Display Fields** sub-sections. Select the desired attributes from the **Available Attributes** column, and use the arrow icon to move to the **Selected Attributes** column. The screenshot below shows the selected attributes in the compliance testing.

The screenshot shows a window titled "Display Fields". It contains two main sections: "Available Attributes" and "Selected Attributes". The "Available Attributes" section is currently empty. The "Selected Attributes" section contains a list of attributes: "AgentScript:ScriptURL", "ID:ID", "FirstName:First Name", "LastName:Last Name", "Cell:Phone 1", "Office:Phone 2", and "E-Mail:E-Mail". Between these two sections are two arrow buttons, ">" and "<". Below the "Selected Attributes" list is a note: "\*Hold down the CTRL key to select more than one option at a time". At the bottom of the window, there is a section with two input fields: "Field Name" and "Field Value", followed by an "Add" button.

List of fields that are available to be selected are shown in the Available Attributes and can be selected and moved to the Selected Attribute section. If you want to add an Available Attribute, the Field Name and Value form can be used to add new attributes to the list.

## 7.5. Administer Call Log Data and customizations

Scroll down to the **Call Log Data** sub-sections. Follow [5] to configure the parameters to match the telephony network.

## Call Log Data

### Available Attributes

CallAnsweredTime\_\_c:CallAns  
Description:Description  
CallType:CallType  
CallDurationInSeconds:CallDu  
CallWrapupTime\_\_c:CallWrapu  
Subject:Subject  
Hold:Hold



### Selected Attributes

\*Hold down the CTRL key to select more than one option at a time

### Field Name

### Field Value

Add

Call Log Enable

True

Display 'Subject' Field

True

### Available Attributes

textstring:VoiceCall  
textstring:  
dropdownlist:subject1#subject2



### Selected Attributes

\*Hold down the CTRL key to select more than one option at a time

### Field Name

### Field Value

Add

Display 'Related To'  
Field

True

Display 'Associated  
To' Field

True

Display 'Comments'  
Field

True

Pre-defined  
Comments Enabled

False

Save Call Log for  
Connected Calls

False

Call Log Custom  
Fields

### Available Attributes

### Selected Attributes

### Customizations

Click to Dial	False
Enable Custom Message	False
Custom Message Text	Welcome
Long Poll Interval (ms)	45000
Agent Script Window	Salesforce
Agent Script Salesforce VisualForce Page name	
Pop Agent Script Window	True

### Last Calls Options

Display Last Calls	True
Display 'Subject' Field	False
Display 'Related To' Field	False
Display 'Associated To' Field	True
Display 'Date/Time' Field	True
Display 'ANI' Field	True
Last Calls Edit Enabled	False

### JS Console Logging

Automatic JS Console Log Dump Interval	0
Directory to store JS Console Dump	C:\Temp\logs\

Field Name	Description	Sample Value	Format
Click To Dial	Click to dial from the SFDC screens is allowed or not. Click to dial is not currently supported with the POM connector.	False	True/False
Enable Custom Message <sup>1</sup>	Whether or not to enable a custom message to be displayed when a new call arrives to a user's desktop(Currently not supported)	True	True/False
Custom Message	The custom message that should be displayed when a new call arrives to a user's desktop.	Hi, this is an intro message	text
Long Polling Interval	The amount of time in seconds long polling should wait before timing out and making a new request.	45000	Time in milliseconds
Agent Script Window	Holds the options to pop in a new browser or when in Console mode to pop in a new Salesforce tab	Salesforce New Browser	
Agent Script VF Page name	Holds the Name of the VF page that will be used when Configuration is set to "Salesforce"	AgentScript VFP	Text
Pop Agent Script	Whether to pop the Agent Script or only display the link in the line appearance	True	True/False

Field Name	Description	Sample Value	Format
Display Last calls	Whether or not to display the last call list.	True	True/False
Display "Subject" Field	Whether or not to display the Subject Field on the Last call list.	True	True/False
Display "Related To" Field	Whether or not to display the Related To Field on the Last call list.	True	True/False
Display "Associated To" Field	Whether or not to display the Associated To Field on the Last call list.	True	True/False
Display "Date/Time" Field	Whether or not to display the Date\Time Field on the Last call list.	True	True/False
Display "ANI" Field	Whether or not to display the ANI Field on the Last call list.	True	True/False
Last Calls Edit Enabled	Last 3 Calls section allows the user to edit the call log information from the Cloud Connector UI	True	True/False

<sup>1</sup> The Custom message field does **not** support the following characters: ; : & \ |.

	itself, rather than opening the Salesforce Activity screen		
Field Name	Description	Sample Value	Format
Automatic JS Console Log Dump Interval	To turn on automatic dumping of UI logs to the backend. Recommended value is below 0. Anything above 30, will be used as the interval in which the UI logs are dumped to Server	0	integer
Number of JS Console messages to Dump	Number of messages on the UI that needs to be sent to the server.	100	integer
Maximum acceptable dump size in KB	The size of the file that is accepted for every incident of dump. Please use the info below to decide the size of the file. 100 Console Messages – 256 KB 200 Console Messages – 500 KB 300 Console Messages – 750 KB	256	integer
Directory to store JS Console Dump	Where to store the UI log dumps on the server	C:\Program Files\Apache Software Foundation\Tomcat 7.0\logs\	string

## 7.6. Administer License for Cloud Connector

To upload a license file, please request the license key from ConvergeOne implementation team/Techsupport team and cut paste the license key.

**License Server Info**

**License Key**

1vy0brpyxj7eccrgwyunovsan0e5io3x5915e9  
8ye0thpvwhx7pph2o0l1ec16vgrbj9z1wn8zbg  
rscvsv9hol1ws8azfufi00915tp1svdigc2dbv  
knwp9eguxm2blzszohmmxr96vmii8g3hw5vt  
r7g0hd1rqf83i03kweoxw6yc4otsiradgywfhm

**Upload License File**

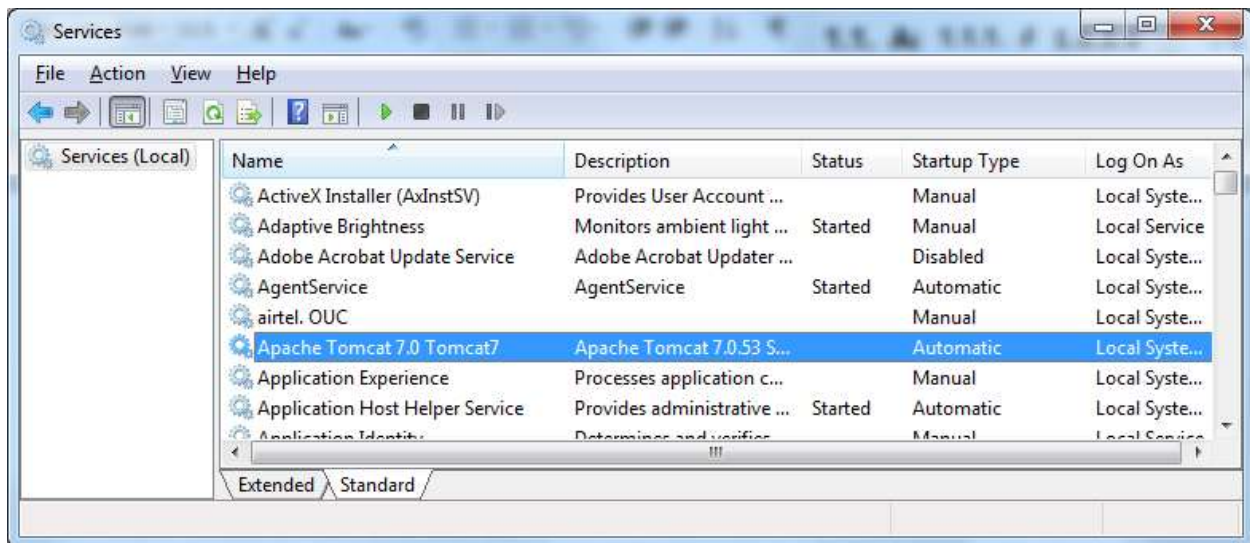
Choose File
No file chosen

Upload License File

Save

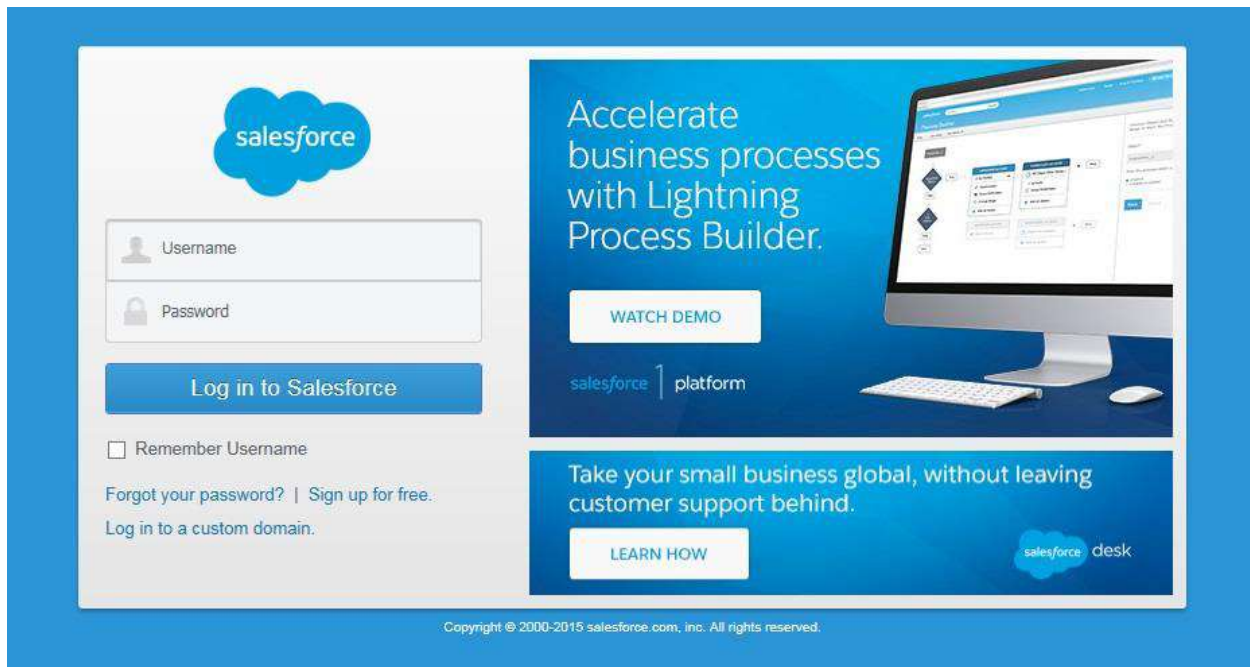
## 7.7. Restart Service

From the SFDC server, select **Start** → **Control Panel** → **Administrative Tools** → **Services** to display the **Services** screen. Restart the **Apache Tomcat 7.0 Tomcat7** service shown below.



## 7.8. Administer Call Center

Access the Salesforce.com login page by using the URL “<https://login.salesforce.com>”, and log in using the administrator credentials.





Scroll the screen as necessary, and select **Build** → **Customize** → **Call Center** → **Call Centers** from the left pane (not shown). The **All Call Centers** screen is displayed, showing a list of pre-configured call centers. Click on the **Edit** button associated with the relevant call center.

## All Call Centers

[Help for this Page](#)

A call center corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce.com users must be assigned to a call center before they can use any Call Center features.

Import				
Action	Name ↑	Version	Created Date	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">AES Call Center Adapter</a>	3.000	5/29/2012 9:30 AM	6/15/2012 9:01 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">AES Call Center Adapter 4</a>	4.000	10/7/2013 10:26 AM	5/13/2014 9:30 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">AES Call Center Adapter 443</a>	4.000	9/4/2013 11:12 AM	9/25/2013 11:36 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">AES Call Center Adapter Vonage</a>	4.000	6/5/2013 8:14 AM	6/7/2013 9:49 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">AES Call Center Highmark</a>	4.000	4/23/2013 11:42 AM	8/27/2013 10:58 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">AvayaLabCCPOM</a>		5/6/2016 1:25 PM	5/6/2016 1:32 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">C1AS - SFDC AES CloudConnector</a>		12/8/2014 7:45 AM	12/8/2014 7:45 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">C1AS - SFDC POM CloudConnector</a>		6/30/2016 8:31 AM	6/30/2016 8:31 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CCE XML Call Center Adapter New</a>	4.000	3/23/2012 1:11 PM	3/23/2012 1:14 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CloudConnectorAES</a>		3/10/2015 6:14 AM	6/28/2016 11:50 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CloudConnectorAESGaston</a>		4/15/2015 12:12 PM	4/15/2015 12:12 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CloudConnectorAIGq</a>		3/10/2015 6:13 AM	5/13/2015 11:39 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CloudConnectorFinesseUCCE</a>		3/12/2015 7:52 AM	3/16/2015 6:58 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CloudConnectorFinesseUCCX</a>		4/1/2015 8:37 AM	4/1/2015 8:38 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CloudConnectorGenesys</a>		3/10/2015 6:12 AM	11/5/2015 8:41 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CloudConnectorPCS</a>		4/9/2015 12:17 PM	4/10/2015 6:06 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CloudConnectorPCSAES</a>		11/30/2015 12:25 PM	12/8/2015 6:06 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CloudConnectorPCSOOpenCTI</a>		4/10/2015 6:18 AM	6/16/2015 9:58 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CloudConnectorPOM</a>		1/26/2016 10:58 AM	2/29/2016 9:07 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CloudConnectorUI2319C</a>		5/21/2015 8:59 AM	5/21/2015 9:02 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CloudConnectorUIPKG23</a>		5/21/2015 9:21 AM	5/21/2015 9:21 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Demo Call Center Adapter</a>	4.000	9/13/2013 9:31 AM	9/13/2013 9:31 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Echopass Call Center Adapter 4.9.12</a>	4.000	5/23/2013 11:34 AM	10/30/2013 12:32 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Genesys Call Center Adapter</a>	4.000	12/4/2013 11:41 AM	12/4/2013 12:23 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">JTAPI Call Center Adapter 4</a>	4.000	5/24/2012 8:40 AM	5/24/2012 8:40 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Paul Call Center Adapter</a>		1/17/2013 12:59 PM	2/25/2015 11:26 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SFDC - Sample Cloud Connector</a>		6/30/2014 12:26 PM	6/30/2014 1:28 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SimpliCTI PCS Call Center Adapter</a>	3.000	5/28/2014 1:20 PM	7/14/2014 11:55 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SimpliCTI UCCX Screenpop Connector V401</a>	4.000	12/10/2013 8:46 AM	12/30/2013 9:56 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Wxx64QA01CCPOM</a>		4/22/2016 8:17 AM	4/22/2016 8:18 AM

Show me [fewer](#) ▲ records per list page

The **Call Center Edit** screen is displayed. For **CTI Adapter URL**, **CTI Standby Adapter URL**, **Primary Config URL**, and **Standby Config URL**, replace the “hostname:8080” portion of the default values with the host name of the SFDC server and port “8443”.

Call Center Edit

[Help for this Page](#) ?

## C1AS - SFDC POM CloudConnector

[All Call Centers](#) » C1AS - SFDC POM CloudConnector

**Call Center Edit**

**General Information** ! = Required Information

InternalNameAAA	<input type="text" value="SFDCPOMCloudConnector"/>
Display Name	<input type="text" value="C1AS - SFDC POM CloudC"/>
CTI Adapter URL	<input type="text" value="http://hostname:8080/CloudC"/>
Use CTI API	<input type="text" value="true"/>
Softphone Height	<input type="text" value="300"/>
Softphone Width	<input type="text" value="200"/>
CTI Standby Adapter URL	<input type="text" value="http://hostname:8080/CloudC"/>
TimeoutInMSecs	<input type="text" value="10000"/>
Primary Config URL	<input type="text" value="http://hostname:8080/CloudC"/>
Standby Config URL	<input type="text" value="http://hostname:8080/CloudC"/>



## 8. Verification Steps

This section provides the verification steps that may be performed to verify that Experience Portal can run iAssist CBM applications.

### 8.1. Verify Experience Portal

1. From the EPM web interface, verify that the MPP server is online and running in the **System Monitor** page shown below.

You are here: [Home](#) > Real-Time Monitoring > System Monitor

#### System Monitor (Jun 15, 2016 1:46:29 PM PDT)



[Refresh](#)

This page displays the current state of the local Experience Portal system plus any remote Experience Portal systems that you have configured. For information about the colored alarm symbols, click Help.

Summary

ExperiencePortal Details

Last Poll: Jun 15, 2016 1:46:19 PM PDT

Server Name	Type	Mode	State	Config	Call Capacity			Active Calls		Calls Today	Alarms
					Current	Licensed	Maximum	In	Out		
EPM	EPM	Online	Running	OK							
ampp	MPP	Online	Running	OK	10	10	100	0	0	29	
Summary					10	10	100			29	

Help

2. From the EPM web interface, verify that the ports on the MPP server are in-service in the **Port Distribution → All servers** page shown below.

You are here: [Home](#) > Real-Time Monitoring > [Port Distribution](#) > Port Distribution Report

#### Port Distribution Report (Jun 15, 2016 1:47:26 PM PDT)



[Refresh](#)

This page displays information about how the telephony resources have been distributed to the MPPs. You configure the telephony resources on the VoIP Connections page.

Total Ports: 10				Last Poll: Jun 15, 2016 1:47:08 PM PDT			
Port	Mode	State	Port Group	Protocol	Current Allocation	Base Allocation	
10	Online	In service	asm	SIP_Trunk	ampp		

[Help](#)

## 8.2. Verify ConvergeOne Advanced Services POM Cloud Connector

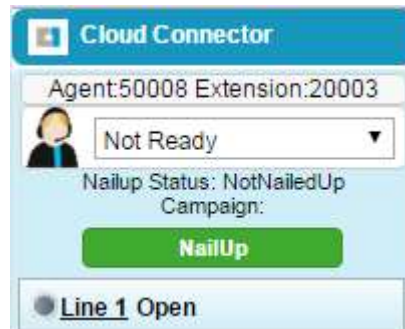
From the agent PC, launch an Internet browser window and enter the Salesforce.com login URL “https://login.salesforce.com”. Log in with the relevant user credentials provided by the end customer.



In the Phone Tab, for **Username**, **Password**, and **Extension**, enter the relevant agent ID, agent password, and agent station respectively. Click **Login**.

After logging in, the user will be on a screen that can be used for Nailing up a call for outbound purposes and also for Agent state change.

**Ready** and **Not Ready** are the two states the agent can choose from. When logged in, the agent is always put in **Not Ready** State. The agent can choose **Ready** state from the drop down list.

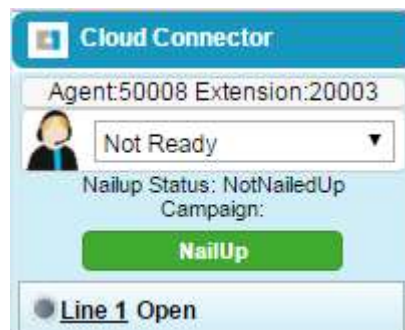


The screenshot shows the 'Cloud Connector' interface. At the top, it displays 'Agent:50008 Extension:20003'. Below this is a dropdown menu with 'Not Ready' selected. Underneath the dropdown, it says 'Nailup Status: NotNailedUp' and 'Campaign:'. A green 'NailUp' button is prominently displayed. At the bottom, there is a 'Line 1 Open' button.

POM nails the agent if a job is running which matches the skillset of the logged in and ready agent. When the agent logs in for the first time, the agent has to click on the Nailup button to inform POM, that the agent is ready for outbound.

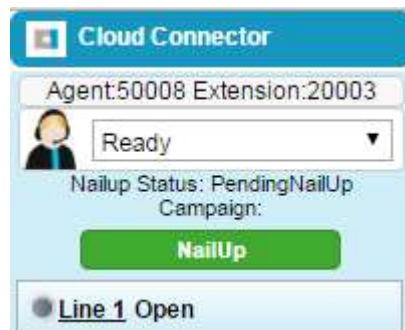
The agent starts with NailUp Status of **NotNailedup** State and goes to **PendingNailUp** and then to **NailedUp** state.

**Note:** If the NailUp call gets disconnected, then the NailUp state goes to **NailingLost**



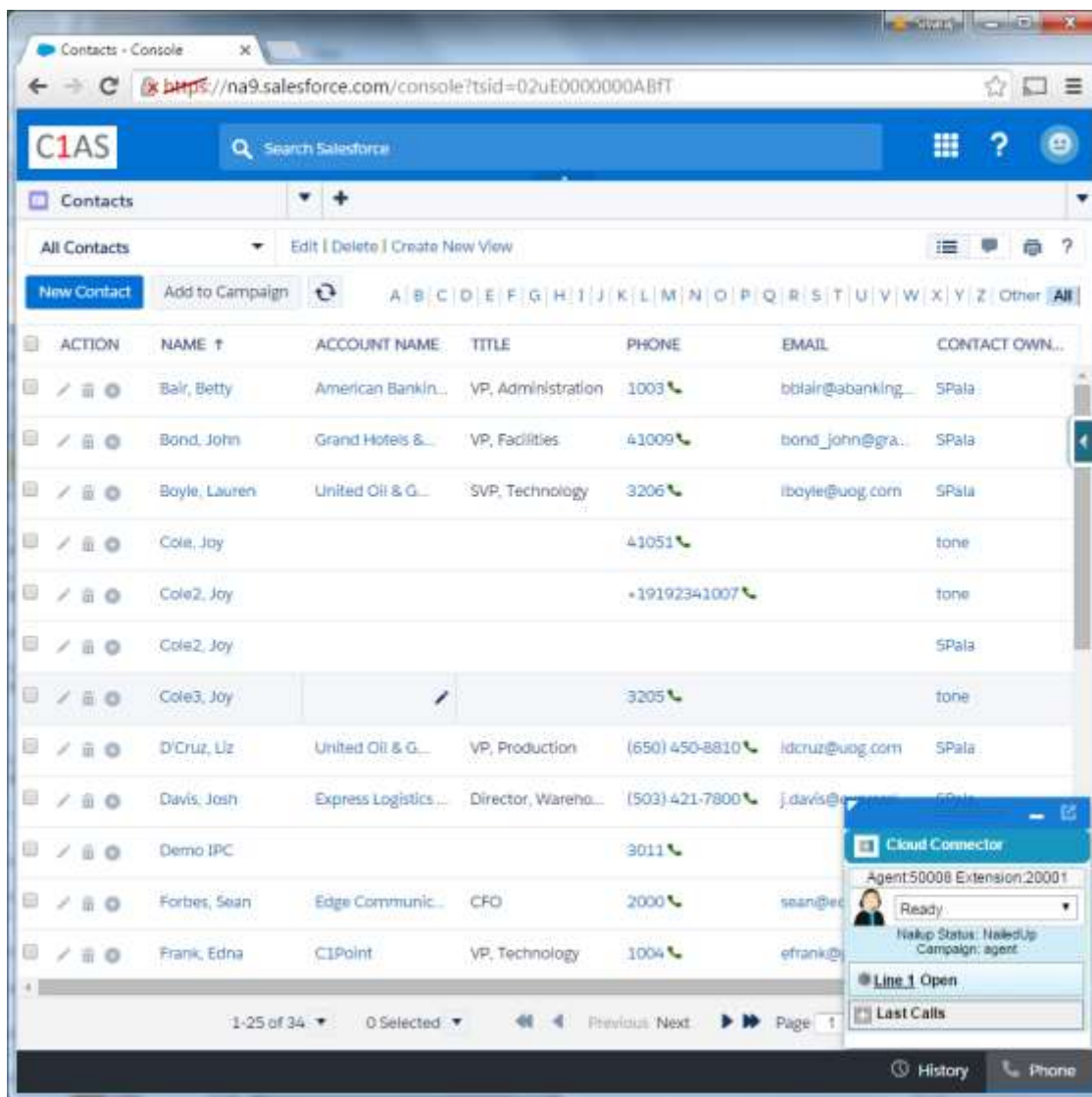
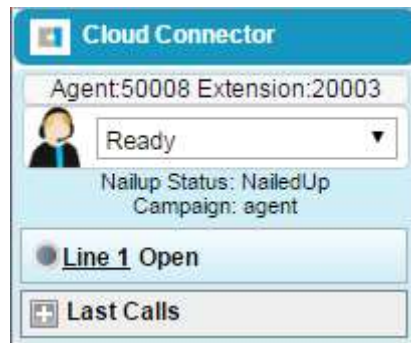
This screenshot is identical to the one above, showing the 'Cloud Connector' interface with 'Not Ready' selected in the dropdown menu and 'Nailup Status: NotNailedUp'.

Agent clicks on **NailUp** button.



The screenshot shows the 'Cloud Connector' interface after the agent has clicked the 'NailUp' button. The dropdown menu now shows 'Ready'. The 'Nailup Status' has changed to 'PendingNailUp'. The 'NailUp' button remains visible, and the 'Line 1 Open' button is still at the bottom.

Agent goes to **PendingNailUp** and a call is delivered to Agent Extension. When the agent clicks on the Nailup Call, it goes to **NailedUp** State.



When a campaign is started and the agent skill matches and Nailed up, the preview/progressive/predictive call will be sent to the Agent UI.

The screenshot displays the Salesforce Agent UI interface. The top navigation bar includes links for Home, Chatter, Campaigns, Leads, Accounts, **Contacts**, Opportunities, Forecasts, Contracts, and Cases. The left sidebar contains a 'Cloud Connector' section with agent status (Ready), a 'Line 1 ESTABLISHED' indicator, and a 'Call Log' section showing a recent call on 2/25/2016 at 12:49:36 PM. The main content area shows the contact details for 'Ms. Maie K', including her name, account name 'Grand Hotels & Resorts Ltd', title 'SVP, Administration and Finance', and various phone numbers. The 'Contact Detail' section includes fields for Department, Birthdate, Reports To, Lead Source, ContactID, Mailing Address, Languages, Created By, and Last Modified By. The 'Opportunities' section at the bottom indicates 'No records to display'.

**Contact: Ms. Maie K ~ Sales**

URL: <https://na9.salesforce.com/003E000000DaD3Z>

Search... Search

Sivara Palanisamy Help Sales

Home Chatter Campaigns Leads Accounts **Contacts** Opportunities Forecasts Contracts Cases +

**Cloud Connector**

Agent50008 Extension:20001

Ready

Nailup Status: NailedUp  
Campaign: agent

**Line 1 ESTABLISHED**

ID: 73  
FirstName: Maie14  
LastName: k  
Cell: 20005  
Office: 9194131295  
E-Mail: mk@con.com  
ConnectedTo: 20005  
Contact: **Ms. Maie K**

**End Call**

**Call Log**

Subject  
2/25/2016, 12:49:36 PM

Name  
Contact: Ms. Maie K

Related To  
-----None-----

Comments

**Last Calls**

**Ms. Maie K**

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

[Opportunities \[0\]](#) | [Cases \[2\]](#) | [Open Activities \[5+\]](#) | [Activity History \[5+\]](#) | [Campaign History \[0\]](#) | [Notes & Attachments \[0\]](#) | [HTML Email Status \[0\]](#)

**Contact Detail** Edit Delete Clone Request Update

Contact Owner	Sivara Palanisamy [Change]	Phone	20005
Name	Ms. Maie K	Home Phone	3204
Account Name	Grand Hotels & Resorts Ltd	Mobile	(312) 596-1230
Title	SVP, Administration and Finance	Other Phone	41051
Department	Finance	Fax	(312) 596-1500
Birthdate	12/16/1945	Email	barr_tim@grandhotels.com
Reports To	View Org Chart	Assistant	
Lead Source	External Referral	Asst. Phone	
ContactID			
Mailing Address	2335 N. Michigan Avenue, Suite 1500 Chicago, IL 60601, USA	Other Address	
Languages	English	Level	Secondary
Created By	Sivara Palanisamy, 5/8/2012 11:29 PM	Last Modified By	Sivara Palanisamy, 2/25/2016 9:47 AM
Description			

Edit Delete Clone Request Update

**Opportunities** New Opportunity Opportunities Help

No records to display

Chat

## 9. Conclusion

These Application Notes describe the configuration steps required to integrate the Cloud Connector with Avaya Proactive Outreach Manager. All feature and serviceability test cases were completed successfully.

## 10. Additional References

This section references the product documentation that is relevant to these Application Notes. Documentation for Avaya products may be obtained via <http://support.avaya.com>

- [1] Implementing Proactive Outreach Manager, Release 3.0.3, May 2016
- [2] Administering Avaya Aura® Communication Manager, Release 7.0, Document 03-300509, Issue 10, June 2015
- [3] Administering Avaya Aura® Session Manager, Release 7.0.1, Issue 2, May 2016
- [4] Administering Avaya Aura® Experience Portal, Release 7.0.1, April 2015
- [5] ConvergeOne Advanced Services SFDC Cloud Connector Install Guide, Release 1.3, March 2016
- [6] ConvergeOne Advanced Services SFDC Cloud Connector User Guide, Release 1.3, March 2016

Documentation related to Cloud Connector may directly be obtained from ConvergeOne.

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