

:talkdesk[®]

Troubleshooting Guidelines for Admins

June 2022

Troubleshooting Guidelines for Admins

This e-Book provides Talkdesk account Administrators information about troubleshooting steps and frequently asked questions with regards to the usage of our products. It will help you to determine the symptoms and applicable workaround.

This document is subject to change. If you would like to suggest any improvements to this document, please report them to us.

Version	Date	Rationale
1.0	Jun 24, 2022	Issued.
1.1	Sep 15, 2022	CTI Connector section added. Minor aesthetic changes.

Troubleshooting Guidelines for Admins

Login

- Error: Your User has Conversations Installed
- Error: Account name accepts only letters and numbers
- Error: Should have at least 3 characters and cannot end with a dash
- Error: Could not validate your credentials
- User(s) didn't receive a Talkdesk invitation

Workspace App

- I can't seem to find the phone dialer
- My Agents can't see the option to change their status
- As an Admin, how can I manage my account within the Workspace App
- How can I access my Apps, inside Workspace
- How can I access external Apps, from Workspace
- Why are my Users being redirected to Workspace instead of Classic
- When my User(s) changes status, the timer starts at a value different than 0:00

Call Quality

- Audio quality is poor
- Using Guardian to get Call quality insights
- My team is working remotely, how can I improve Call quality?
- Agents cannot hear Caller
- Caller cannot hear Agents

Call Routing

- How was this Call routed

CTI Integration

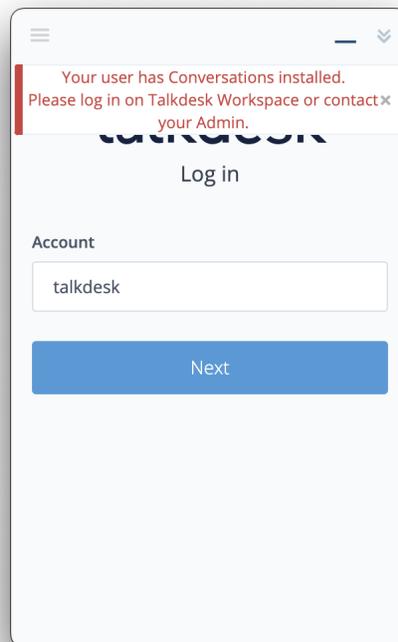
- Errors "Please login in your Salesforce Connector" or "Your default integration is not connected"

Troubleshooting Guidelines for Admins

Login

Error: Your User has Conversations Installed

If you already started the migration process to move away from Callbar into Conversations, also known as Workspace, it's likely that some of your Users will catch the following message: *Your User has Conversations installed. Please log in on Talkdesk Workspace or contact your Admin.*



Resolution: This occurs every time that a User attempts to use Callbar, but was already migrated to Workspace.

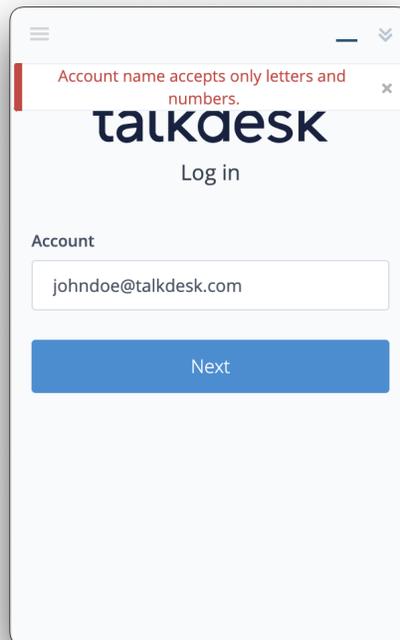
- Instruct the User to log in via:
 - For US accounts: [your-account-name].mytalkdesk.com/atlas/.
 - For EU accounts: [your-account-name].mytalkdesk.eu/atlas/.
 - For CA accounts: [your-account-name].mytalkdeskca.com/atlas/.
- Or, instruct to download and use the Desktop app:
 - For US accounts: [your-account-name].mytalkdesk.com/atlas/download.
 - For EU accounts: [your-account-name].mytalkdesk.eu/atlas/download.
 - For CA accounts: [your-account-name].mytalkdeskca.com/atlas/download.

 [Upgrading to Talkdesk Agent Workspace](#)

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Error: Account name accepts only letters and numbers

This error is exhibited in Callbar, if one of your account Users attempts to insert an e-mail or their Username instead of the Account name, an error will popup to alert.

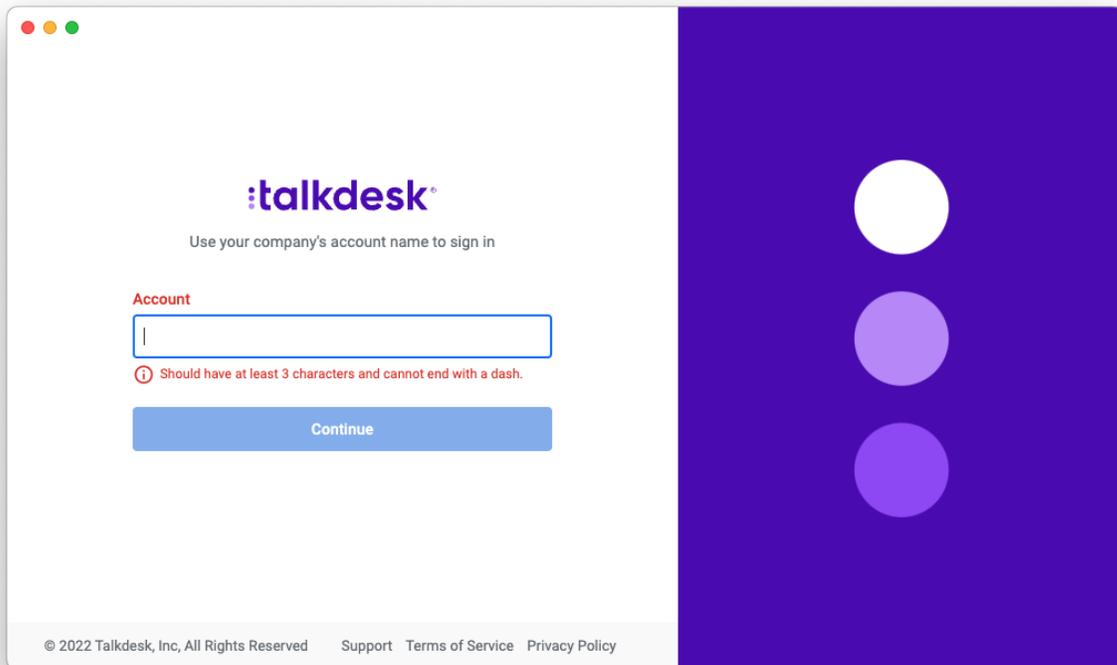


Resolution: Make sure you provide all your Users with the correct Account Name.

Troubleshooting Guidelines for Admins

Error: Should have at least 3 characters and cannot end with a dash

This error is exhibited in the Workspace App, if one of your account Users attempts to insert special characters or a string too short to be compatible with a valid Account Name.

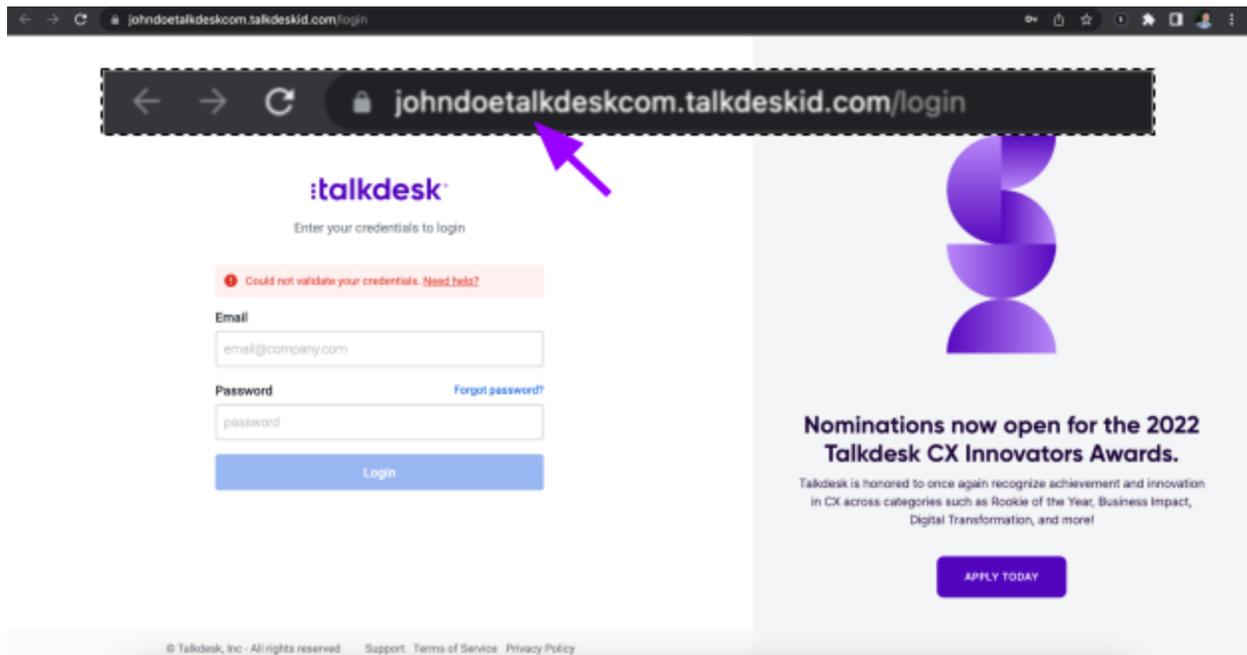


Resolution: Make sure you provide all your Users with the correct Account Name.

Troubleshooting Guidelines for Admins

Error: Could not validate your credentials

This message will eventually show up on your browser during an attempt to log in without success, either through Callbar or Workspace.



Resolution: To troubleshoot the root cause, navigate to the address bar of Google Chrome and check if the URL is showing the correct Account Name. Most likely will not! Go back to Callbar or Workspace and retry to log in using the correct Account Name.

There are also some cases in which the Account Name was correctly typed but the User is still unable to log in. Explore the following options:

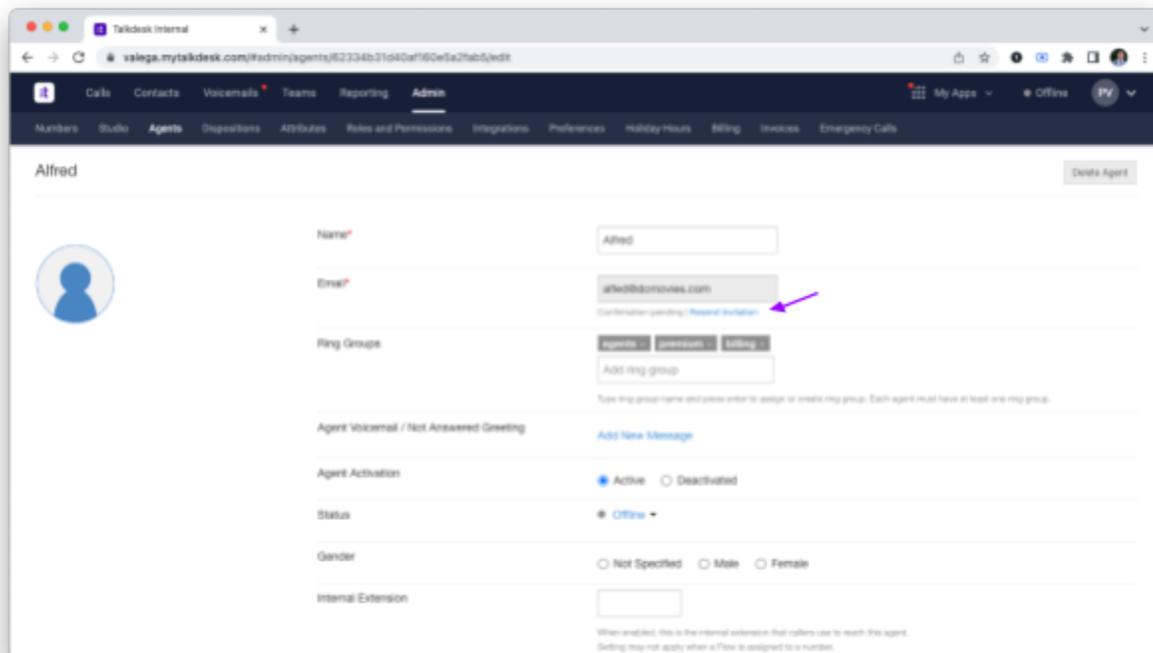
- Check if the User is correctly configured under your account. If not, create it.
- Check if the User's e-mail is correctly configured under the Agent Profile. If not, reach Support to correct it.
- Check if the User is active. If not, activate it.
- Help the User to recover their password through the option "Forgot password?".

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User(s) didn't receive a Talkdesk invitation

After assigning a new license under your Talkdesk Account, Users will need to confirm their enrollment to start using any of the installed products.

This is not applicable to Accounts that have exclusive SSO login methods as these are automatically activated upon the first login.



Resolution:

- Make sure the Agent is created under your account.
- Confirm that the Agent is set as active.
- Make sure the email registered on the Agent's profile is correct.
- Whitelist the following domains:
 - *talkdesk.com
 - *outbound-mail.sendgrid.net
 - *sendgrid.net
- If everything above has been confirmed and/or corrected, retry sending the invitation e-mail by navigating to Admin > Users > UserName > Resend Invitation.

Troubleshooting Guidelines for Admins

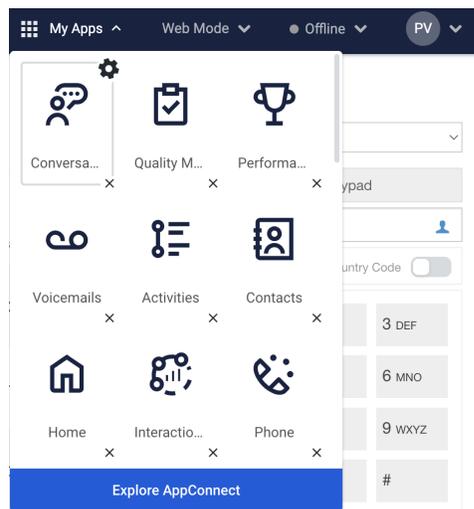
Workspace App

I can't seem to find the phone dialer

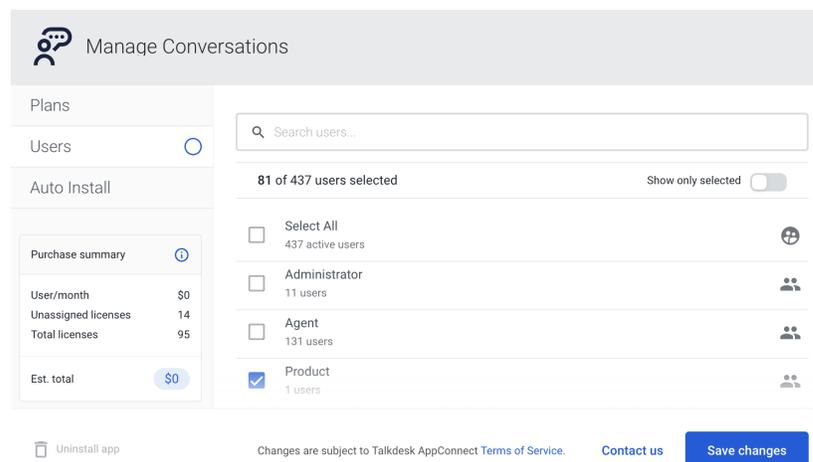
After migrating or activating the Workspace App there is one additional step that you, as an Administrator, need to complete: enable Conversations.

Resolution:

- Under My Apps, locate Conversations and click the cogwheel on the right top corner of the app.



- Then, select Users and make sure to tick all Users that should be having access to Conversations.



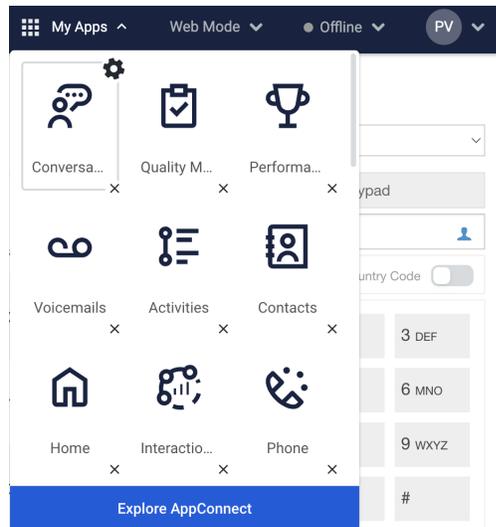
Troubleshooting Guidelines for Admins

My Agents can't see the option to change their status

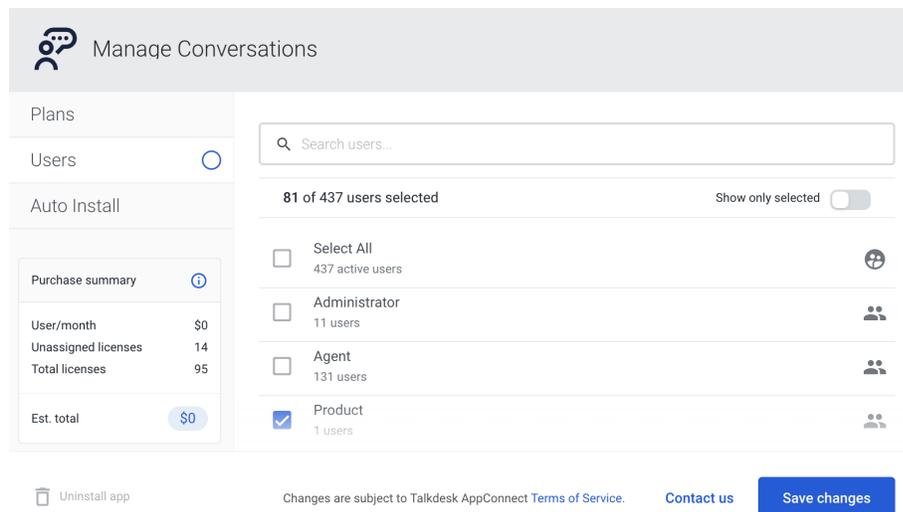
Again, there is still one step to complete before your Agents are ready to fully use the Workspace: enable Conversations.

Resolution:

- Under My Apps, locate Conversations and click the cogwheel on the right top corner of the app.



- Then, select Users and make sure to tick all Users that should be having access to Conversations.

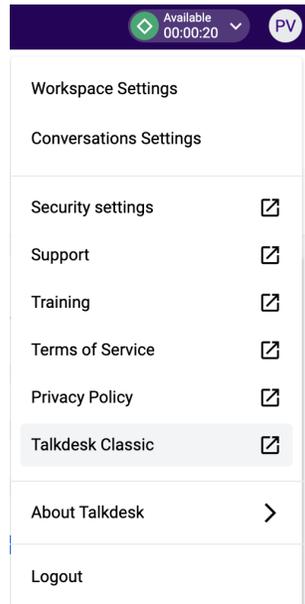


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As an Admin, how can I manage my account within the Workspace App?

The Workspace App is composed of several products, one of them being the Administration panel. While most of the functionalities have already transitioned from other versions to the Workspace App, this is not the case for the Administration Panel.

Resolution: To manage your account you still need to access Talkdesk Classic. Navigate to your initials, on the right top corner of the screen and click it. Then from the dropdown menu, select Talkdesk Classic.

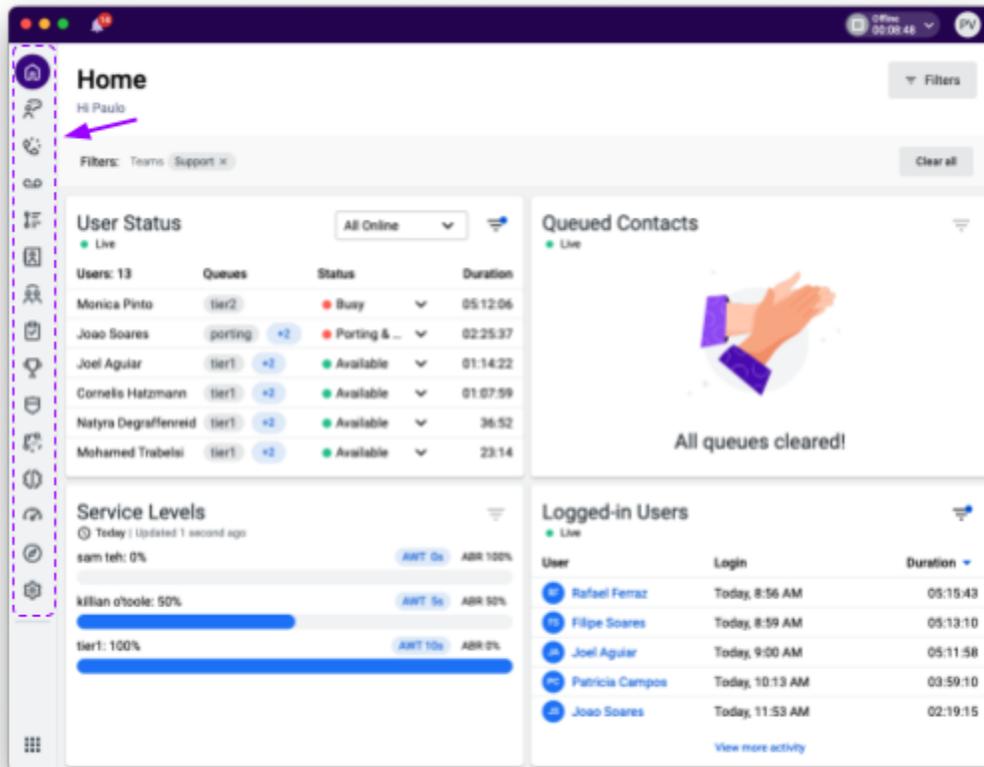


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How can I access my Apps, inside Workspace?

Talkdesk Agent Workspace unifies all CX applications and information agents need, empowering them to work more efficiently and effectively.

Resolution: On the left side of the App, you will find a vertical navigation bar, composed of several icons. Click on the desired one to reach the App/Product.



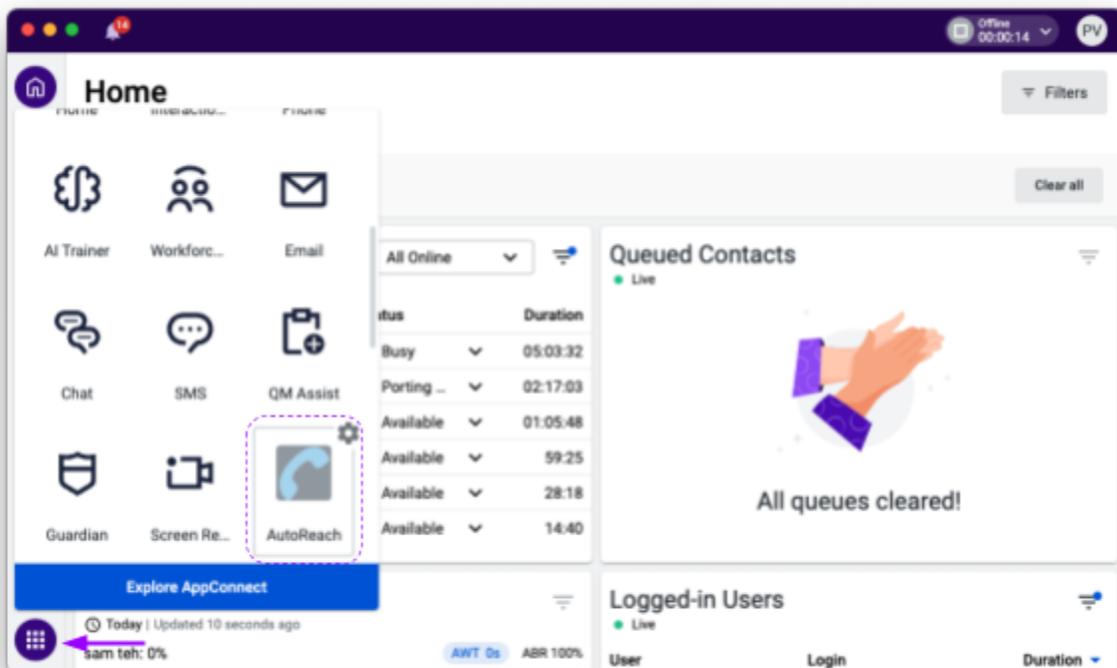
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How can I access external Apps, from Workspace?

AppConnect contains hundreds of Apps that are able to boost your productivity.

We want to provide you with the best experience while navigating through all your Apps and touchpoints. Therefore, it's also possible to access your external installed apps, from Talkdesk Agent Workspace.

Resolution: On the left side of the App, you will find a vertical navigation bar. Click on the last button to visualize all your Apps, including the external ones.



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Why are my Users being redirected to Workspace instead of Classic?

As part of the migration process to Workspace, or to prevent Users from using Callbar, you may want to define a scenario in which using Workspace is the only available option. In this case, Users will not be able to log in on Callbar.

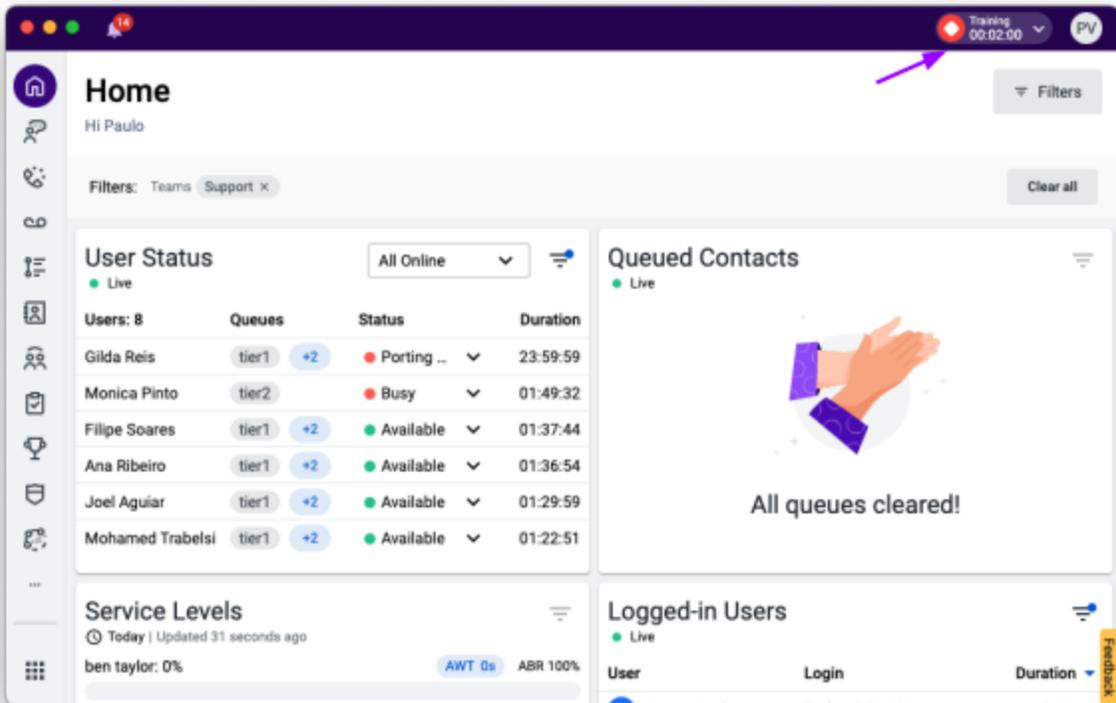
Resolution:

- For an Account-level setting:
 - Under Admin > Preferences > Login on Talkdesk Workspace, check if the toggle for Activate Talkdesk Workspace as the default login experience is active.
- For a User-level setting:
 - Under Agents > *AgentName* > Login on Talkdesk Workspace, check if the toggle for Activate Talkdesk Workspace as the default login experience is active.

Troubleshooting Guidelines for Admins

When my User(s) changes status, the timer starts at a value different than 0:00

When transitioning between statuses, either auto or manually induced, you may notice that your User(s) timer is starting at a different value than 0:00. For contextualization, the User below transitioned from Available to Training status and the timer started at 00:02:00.



The screenshot shows the Talkdesk Admin interface. In the top right corner, a user's status is shown as 'Training' with a timer at '00:02:00'. A purple arrow points to this timer. The main interface displays a 'User Status' table with the following data:

Users: 8	Queues	Status	Duration
Gilda Reis	tier1 +2	Porting ..	23:59:59
Monica Pinto	tier2	Busy	01:49:32
Filipe Soares	tier1 +2	Available	01:37:44
Ana Ribeiro	tier1 +2	Available	01:36:54
Joel Aguiar	tier1 +2	Available	01:29:59
Mohamed Trabelsi	tier1 +2	Available	01:22:51

Other sections visible include 'Queued Contacts' (All queues cleared!), 'Service Levels' (ben taylor: 0%, AWT 0s, ABR 100%), and 'Logged-in Users'.

Resolution: This happens when your User's computer clock is not aligned with the respective timezone. Refer to [this website](#) to check any discrepancies and adjust it accordingly.

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Call Quality

Audio quality is poor

Delays, pops, clicks? We know how important it is for you to establish a good connection with your Customers. We feel the same! Most of the incidents reported as poor audio quality are mainly related to your network conditions.

Resolution: To guarantee the best audio quality possible, please take a moment to review the article on our knowledge base - [Setting up Talkdesk: Requirements and Best Practices](#).

Afterward, complete the following checklist:

- Browser: Google Chrome is configured as the default browser and updated to the latest version.
- Operating System (OS): Windows 10 / OSX 10.14+ / Linux 64bit (Debian 9 or Red Hat 8 based distros) / Chrome OS.
- RAM: Recommended 8 GB of RAM.
- CPU: Intel i5 / AMD Ryzen 5.
- Security: If you use any software or Proxy that can block applications, please include Callbar and/or Workspace in the allowlist. More info [here](#).
- Virtualization: avoid using the Callbar usage inside a VDI and read the recommendations below for VDI usage.
- Make sure to use a wired Ethernet connection instead of WiFi.
- We recommend using a wired headset with a 3.5 mm jack (analog) port.
- Run a network quality test, [here](#) and compare it with the following values:

 [Check logs here](#).

Metric	Required	Recommended
MOS Score	> 4.2	> 4.3
Jitter	< 30 ms	< 10 ms
Packet Loss	< 3 %	< 1 %
Round Trip	< 200 ms	< 100 ms

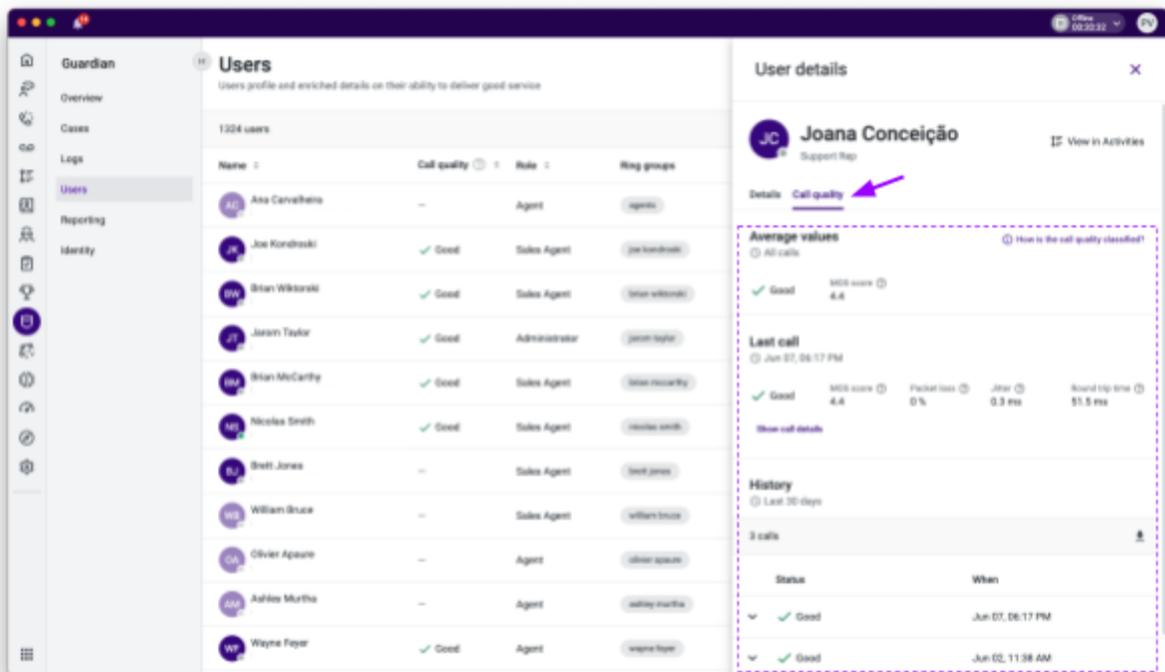
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Using Guardian to get Call quality insights

Guardian shows if and where your agents might be engaging in risky behavior or outside the “norm”, but not only. It also provides you valuable insights about Call quality, allowing you to take appropriate measures to the network connection or the set up of your Agents.

Resolution:

- Under Guardian, navigate to Users.
- Observe the column Call quality, which reports the average scoring for every User of your Account.
- To get details about a certain User, click on the respective name.
- On the right pane, select Call quality and observe that you are able to get specific Call details, of the past 30 days.
- You can now identify Agents presenting degraded network connectivity. You can leverage Talkdesk recommendations to adjust the setup and networking connectivity.



 [Using Talkdesk Guardian Users](#)

Troubleshooting Guidelines for Admins

My team is working remotely, how can I improve Call quality?

Talkdesk allows your team to deliver world-class service to your Customers, taking advantage of our Workspace App. The performance of our products and services is dependent, among other factors, on the quality of the internet connection of your Users.

Resolution: Take a moment to review and cascade the information contained in our knowledge base article - Best Practices when Working From Home.

Afterward, complete the following checklist for every team member:

- Computer and Setup
- Wired Headset
- Network

 [Best Practices when Working From Home](#)

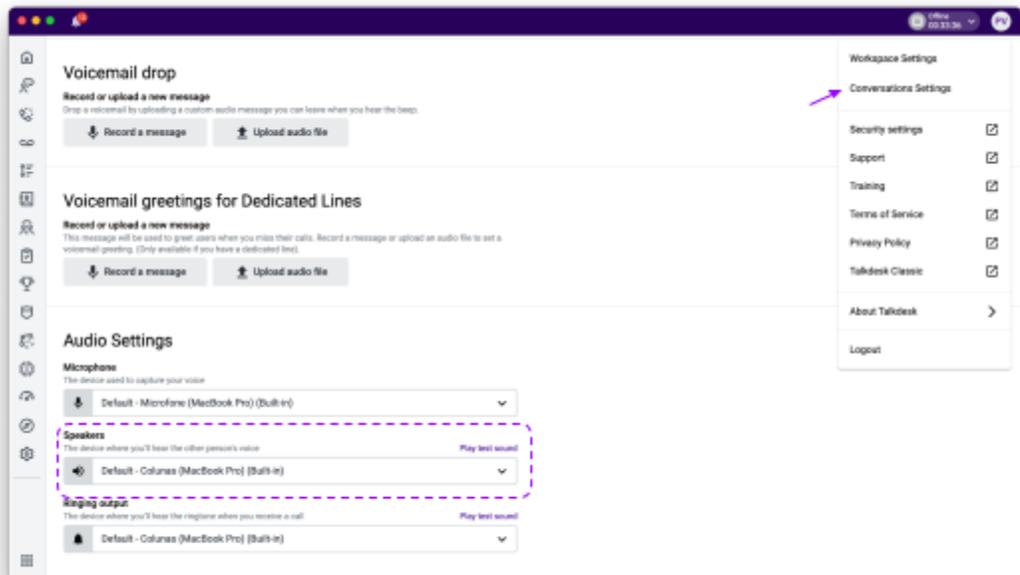
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Agents cannot hear Caller

In the scenario where, in a Call, Agents are not able to hear Caller, firstly you need to understand if this symptom occurs in every Call, or if you are able to isolate it to a specific Agent.

Resolution:

- If it happens with every Call:
 - Configure your Firewall and router to have the following ports open:
TCP: 443 and 80 outbound and inbound.
UDP: 1,024 to 65,535 outbound only.
 - Make sure that no proxy server is controlling the ports mentioned above, since port 80 cannot be proxied on a network with Talkdesk agents.
 - Configure your Antivirus and VPN to allow Workspace as a trusted App.
- If it happens with certain Agent(s):
 - Check if the speakers are muted.
 - Check if the speakers are able to reproduce audio from other apps.
 - On the right top corner of the Workspace App, locate your initials and click it. Then, select Conversations Settings and make sure that the desired Speakers are correctly selected:



 [Agents cannot hear Caller](#)

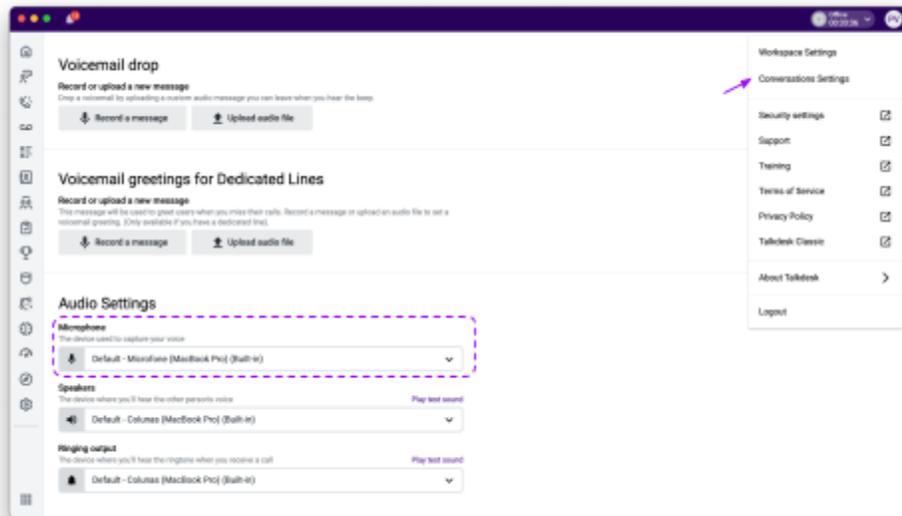
Troubleshooting Guidelines for Admins

Caller cannot hear Agents

Under some circumstances Caller can report the inability to hear your Agents. Most of the issues reported are related to browser permissions and hardware settings.

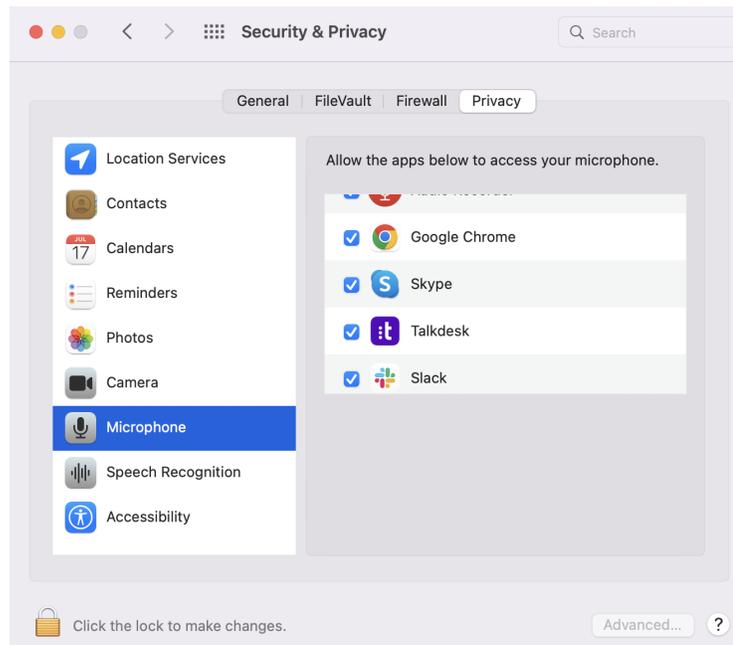
Resolution:

- Check if your headset is correctly connected, if possible try another port.
- On the right top corner of the Workspace App, locate your initials and click it. Then, select Conversations Settings and confirm that the correct Microphone is selected:

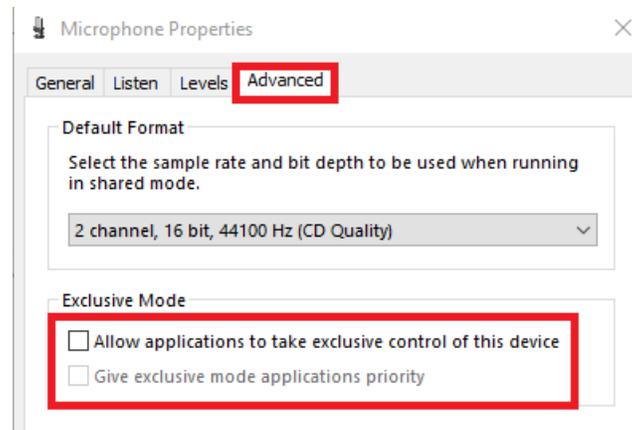


- Confirm that you have the latest version of Google Chrome, and that is configured as the default browser. Consider removing any of the following extensions: Adblock Plus, Adblock, HTTPS Everywhere, ScriptSafe, Flashblock, Disconnect, DoNotTrackMe, Ghostery and WebRTC Network Limiter.
- On Google Chrome, navigate to <chrome://settings/content/microphone?> and check if your account URL is listed as authorized to access your microphone.
- If you are using macOS:
 - Confirm if Talkdesk has the right to access your microphone, by navigating to System Preferences > Security and Privacy > Microphone.

Troubleshooting Guidelines for Admins



- If you are using Windows:
 - Open your navigate to "Control Panel" (either through File Explorer, Start Menu, or the Search Bar). Then click on "Hardware and Sound" and then click on "Sound".
 - Click on the "Recording" tab and then select your microphone and click "Properties".
 - Click the "Advanced" tab. remove the check mark next to "Allow applications to take exclusive control of this device" to the box. Apply.



 [Caller cannot hear Agents](#)

Call Routing

How was this Call routed

It's common practice wanting to know how a certain Call was routed. This is particularly useful to understand what flow or part of it did the Call take, as well as the status and behavior of every Agent that was involved in answering it.

Resolution: To achieve this, we will need to pull 3 complementary reports.

- First, identify the Call through the corresponding ID. You can follow this article for detailed instructions on how to get it.
- Then, navigate to Reporting > Explore:
 - In Default Reports, search for Studio Flow Execution Report - this will allow you to understand which steps the Call went through and if they were successful or not.
 - Adjust the Date filter to match the correct period, paste the Call ID under Interaction ID and run it.
- Once again, navigate to Reporting > Explore:
 - In Default Reports, search for Agent Status Report - this will allow you to understand the status of every Agent at the time of the Call.
 - Adjust the Date filter with the correct range and run it.
- As a final step, navigate to Reporting > Explore:
 - In Default Reports, search for Ring Attempts Report - this will allow you to understand what was the behavior of every Agent when invited to respond to that particular Call.
 - Adjust the Date filter to match the correct period, paste the Call ID under Interaction ID and run it.

 [How was this Call routed](#)

Troubleshooting Guidelines for Admins

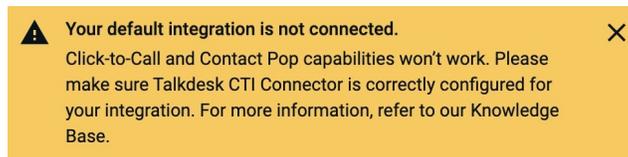
CTI Integration

Errors “Please login in Salesforce Connector” and “Your default integration is not connected”

Callbar Error Message:

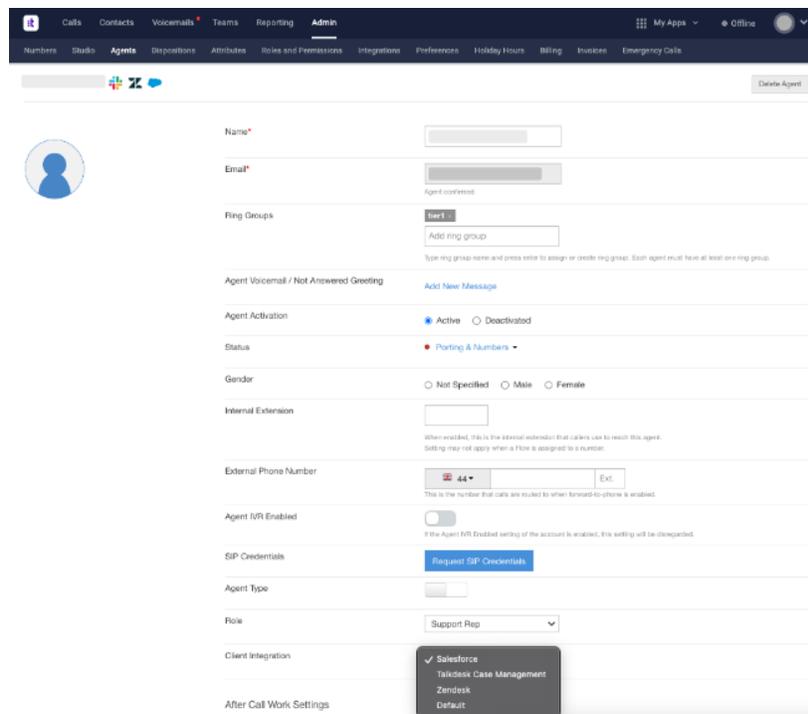


Workspace Error Message:



Resolution: To check all the steps necessary to have the CTI connected follow these instructions.

1. Confirm the agent set-up:
 - Confirm that the integration that the agent should connect to the CTI with is selected on the “Client Integration” option inside of the agent profile:



Troubleshooting Guidelines for Admins

2. Confirm the correspondence between Talkdesk and the connected system:
 - Confirm if the user exists in both Talkdesk and the connected system, with the same e-mail. In case the e-mail address is not the same, please contact Talkdesk Support.

3. Confirm the agent's usage:
 - Make sure that the agent is using a single Chrome tab of Salesforce / Zendesk / Dynamics (or other CTI-compatible integrations). If at any point the agent opens a second Chrome tab of Salesforce / Zendesk / Dynamics, the CTI can become disconnected again.
 - Ask the agent to sign in to Talkdesk through the Workspace App or the Callbar. Web versions of Talkdesk Apps, such as Workspace via the browser or Callbar Web version (directly in Chrome) do not support CTI functionalities.
 - Once you confirm that the agent is fully logged in a Talkdesk App, ask them to sign in the CTI in Salesforce/Zendesk/Dynamics. The two systems should now be connected!
 - Advise the agent that closing the lid of a laptop, putting the computer to sleep, network interruptions, or long periods of inactivity can interrupt this connection. Performing the steps documented above will be necessary.