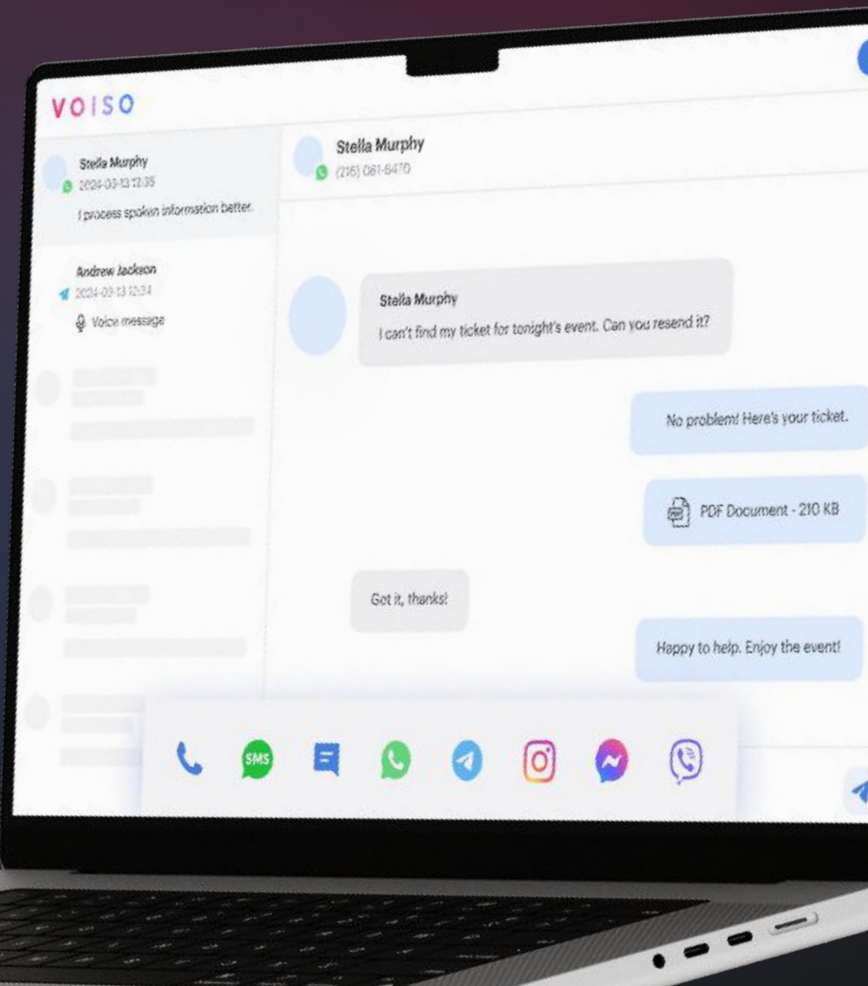# Omnichannel integration guide

Embedding Voiso Agent Workspace into your application

August, 2024

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Introduction

The Voiso Omnichannel Workspace provides a unified platform for agents to seamlessly manage customer interactions across various communication channels. This document provides a step-by-step guide for embedding the Omnichannel Agent Workspace into your application using an iframe, including key technical and functional considerations.

Prerequisites

1. Digital Channel Provisioning

Ensure that the Omnichannel feature is enabled for your Voiso contact center. Please contact your Voiso representative if this feature is not currently activated.

2. WhatsApp Number and Template Approval

WhatsApp should be enabled for your contact center. Make sure that your WhatsApp business profile is set up and the template approval process is completed.

How to access the agent workspace inside your application

You can embed the Voiso Agent Workspace as an iframe within your application. The workspace consolidates all agent activities across both traditional channels (voice, SMS) and digital channels (WhatsApp, Viber, webchat, etc.).

Steps to Embed the iframe

1. Omnichannel Workspace URL

Access the Omnichannel Workspace using the following URL pattern:

https://{{cluster}}.voiso.com/omnichannel/embedded

Example:
https://cc-ams05.voiso.com/omnichannel/embedded

```
<iframe
  src="https://cc-ams05.voiso.com/omnichannel/embedded"
  width="1300"
  height="768"
  style="border: none;"
  allow="microphone; autoplay">
</iframe>
```

Note: contact your Voiso representative if you are unsure about the name of your contact center cluster.

2. Mandatory Setup Requirements
- Minimum Display Resolution: 1300 x 768 pixels for optimal rendering.
- Microphone Access: Set the `microphone-allowed` flag within the iframe.
- CORS Enablement: Contact your Voiso representative to enable CORS for your IP address.

3. User Authentication
- Agents must authenticate using their Voiso username and password credentials.
- User login sessions remain active until the agent logs out manually or is forced logout by the system due to inactivity.
- Ensure that the email address of your application users matches that of the Voiso agent for seamless integration.

How to initiate interactions from your application

To initiate interactions, integrate the following Voiso APIs into your application:

1. Sending WhatsApp Templates to a Contact
You can send WhatsApp templates to existing CRM contacts using the following APIs:

List Template API:

Method: GET

Endpoint: /api/v3/messages/whatsapp/templates

API Documentation

Send Template API:

Method: POST

Endpoint: /api/v3/messages/whatsapp

API Documentation

2. Initiate an Outbound Call (Click-to-Call) from Your Application

Use the Voiso Click-to-Call API to initiate an outbound call to a phone number.

Endpoint: POST /api/v1/{api_key}/click2call

API Documentation

3. Send SMS from Your Application

Use the Voiso Send SMS API to send an SMS to a phone number.

Endpoint: POST /api/v1/{api_key}/sendsms

API Documentation

How to log interaction data in your application

Log details of interactions by subscribing to Voiso webhooks. Voiso webhooks provide real-time notifications for specific events. For more information on webhook structure, please visit our developer guide **Webhook Overview & Object Model**.

1. Call Events

call.answered: triggers when a call is picked up.

call.hangup: triggers when a call is hung up.

call.ended: triggers when a post-call is completed.

Developer Guides: Inbound, Outbound, Dialer

2. Digital Interaction Events

message.received: triggers when a new message arrives.

conversation.ended: triggers when a conversation is archived.

Developer Guide: Digital Interactions

How to process data synchronization in batches

To synchronize interactions in batch mode, typically once a day, use the Call Detail Record (CDR) APIs.

1. CDR API:

Method: GET

Endpoint: /api/v2/cdr

API Documentation

Note: all interactions (voice and digital channel) are added to a CDR record, you can filter them using type parameter.

2. Messages API:

Method: GET

Endpoint: /api/conversation/v1/conversations/{uuid}/messages

API Documentation

Note: The content of text and media messages within a digital conversation is accessible through the Messages API including WhatsApp etc.

Additional Documentation

For more detailed information, please refer to the following resources:

• **Overview of Voiso Omnichannel Workspace**

• **Enabling Omnichannel**

• **Working with WhatsApp**

• **Working with Telegram**

• **Working with Viber**

• **WebChat Configuration**

• **Webhook Configuration**

For any questions, please contact us at:

Pratim Bhattacharya
Senior Product Manager

✉ k.pratim@voiso.com
✉ product@voiso.com