

SALESFORCE INTEGRATION Product Guide



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- Introduction

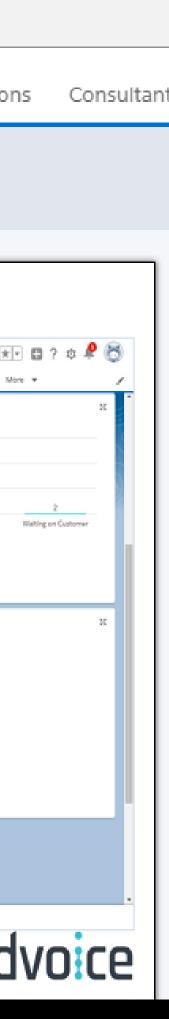
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INTRODUCTION

This integration is intended for b-hive users who use Salesforce as their CRM and want to gain efficiencies by having inbound and outbound calls tracked automatically in Salesforce.



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FEATURES

Inbound record matching

The calling party number is matched against Salesforce accounts, contacts, leads, and cases allowing a user to quickly access the right area

Outbound click-to-call

Calls can be originated from Salesforce records with a single click

Call dispositioning

Identify the outcome of each call using a consistent pick-list

Call notes

Add notes to each call activity on the fly

New records

Create new leads or cases easily from the embedded app

Activity logging

Time, duration, and direction of each call is stored

Record-linking

link to b-hive call recordings and voicemails within Salesforce

REQUIREMENTS

- Active Broadvoice b-hive account
- User(s) must have an integration-enabled Pro seat
- Active Salesforce account (Professional, Enterprise, and Unlimited)
- Integration users added to Salesforce call center



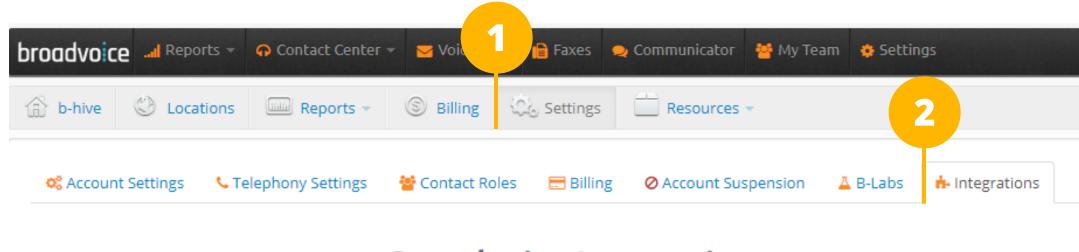
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INSTALLATION & SETUP

ENABLING B-HIVE USERS

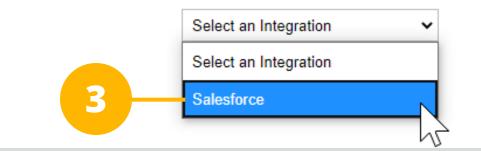
Users needing the ability to use the Salesforce integration must be enabled in the b-hive account by an account admin.

- 1. Select the **Settings** tab
- 2. Select the **Integrations** tab
- 3. Select **Salesforce** from Integrations drop-down
- 4. Select **Inbound /Outbound** for all users needing access
- 5. Copy **API Key** for later use



Broadvoice Integrations

Welcome to Broadvoice Integrations! On this page you have the ability to enable your preferred integration.





Broadvoice Integrations

Welcome to Broadvoice Integrations! On this page you have the ability to enable your preferred integration.

Salesforce	×	
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Here is your API key: fb51c57	0247bb80f3caaf6b92340aef	6 Copy - 5	
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☑4	<u> </u>	Annie Alexander	
		Beverly Russell	

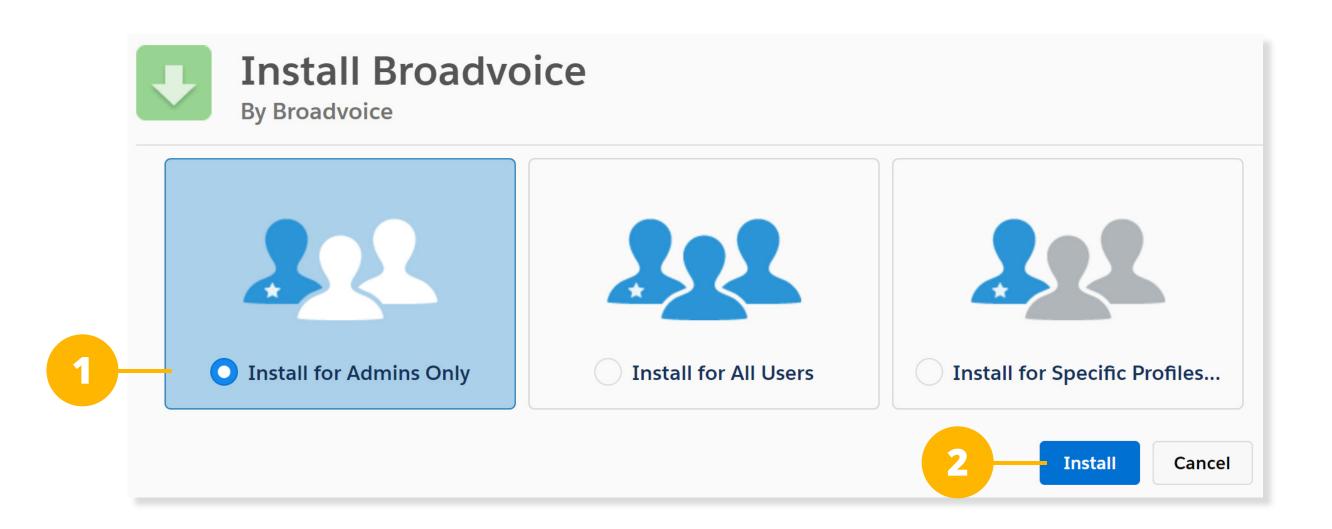




INSTALLING IN SALESFORCE

The Broadvoice integration can be located in the Salesforce AppExchange. Once found, follow the below steps for installation.

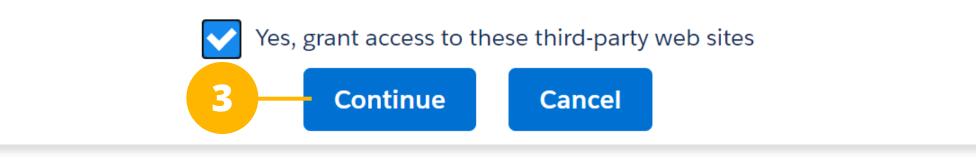
- 1. Select Install for Admins Only
- 2. Click **Install**
- 3. Grant third-party access and select **Continue**



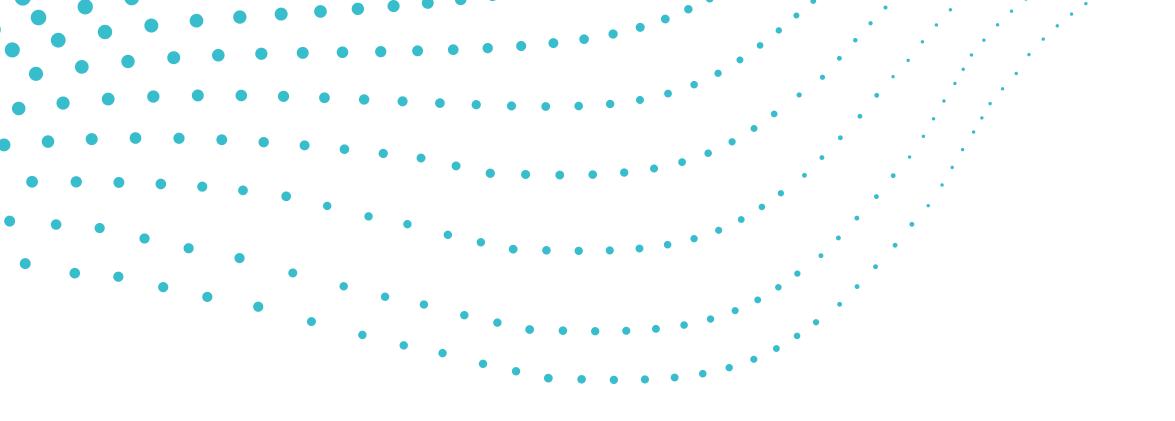
Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?

Website	SSL Encrypted
api.xbp.io	
login.salesforce.com	
test.salesforce.com	







Then click on the App Launcher icon in the upper left-hand corner (Lightning) and choose Broadvoice Setup. This will begin a simple wizard. Walk through the following steps to complete.

1. Click Get Started

- 2. Paste the **API Key** located on the b-hive integrations page
- 3. Click Authorize

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Complete the sections below to set up the Broadvoice integration.



Establish Outbound Connection

Connect your Salesforce org to your Broadvoice account

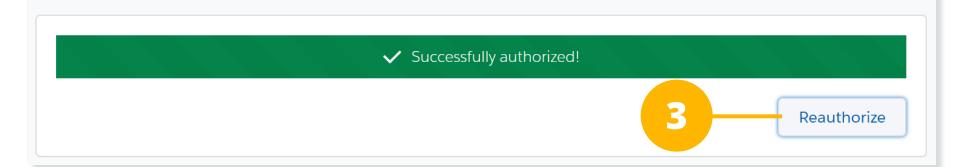
i You can obtain a Broadvoice API Key from your resources under account settings.

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* API Key fb51c570247bb80f3caaf6b92340aef6

Establish Inbound Connection

Authorize Broadvoice to send data to your Salesforce org





Then you'll need to add the CTI Softphone to the app your company uses within Salesforce (Lightning Only)

- 1. Find App Manager in Setup
- 2. Choose **Edit** from the drop down to the right of the app you use
- 3. Select **Utility Items**
- 4. Add Open CTI Softphone
- 5. Click Save

When complete, click **Back** in the upper righthand corner to return to setup.

* Note: Changing the Softphone Label to 'b-hive' or 'Broadvoice' can help identify its location for users.

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ENABLING SALESFORCE USERS

You'll need to designate which users you would like to have access to the Broadvoice CTI.

- 1. Select Call Centers under Setup
- 2. Click on **Broadvoice**
- 3. Click Manage Call Center Users
- 4. Find the users and add them to the Call Center

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VERIFYING INSTALLATION

To ensure the package has been set up correctly, click **Home (Classic)** or launch the appropriate application from the App Manager and click the phone icon in the bottom left-hand part of the screen (Lightning). You should see a login screen with a Broadvoice logo.

CREATING CUSTOM VIEWS

As a Salesforce admin, you can create custom layouts as well as designate which views are available to specific user roles. Available call fields are: *length, type, result, comments, recording URL and voicemail URL.* First search for **Object Manager** within Setup and select the **Task** object then follow these simple steps below:

- 1. Select Page Layout and click on Task Layout
- 2. Add a section named **Call Details**
- 3. Add the desired call-related fields
- 4. Click Save

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PROFILE PERMISSION SETS

The CTI package requires user profile access to many fields. For some organizations, these fields might be restricted based on the configuration of Salesforce. To easily grant access, you can assign permission sets provided upon installation of the CTI package.

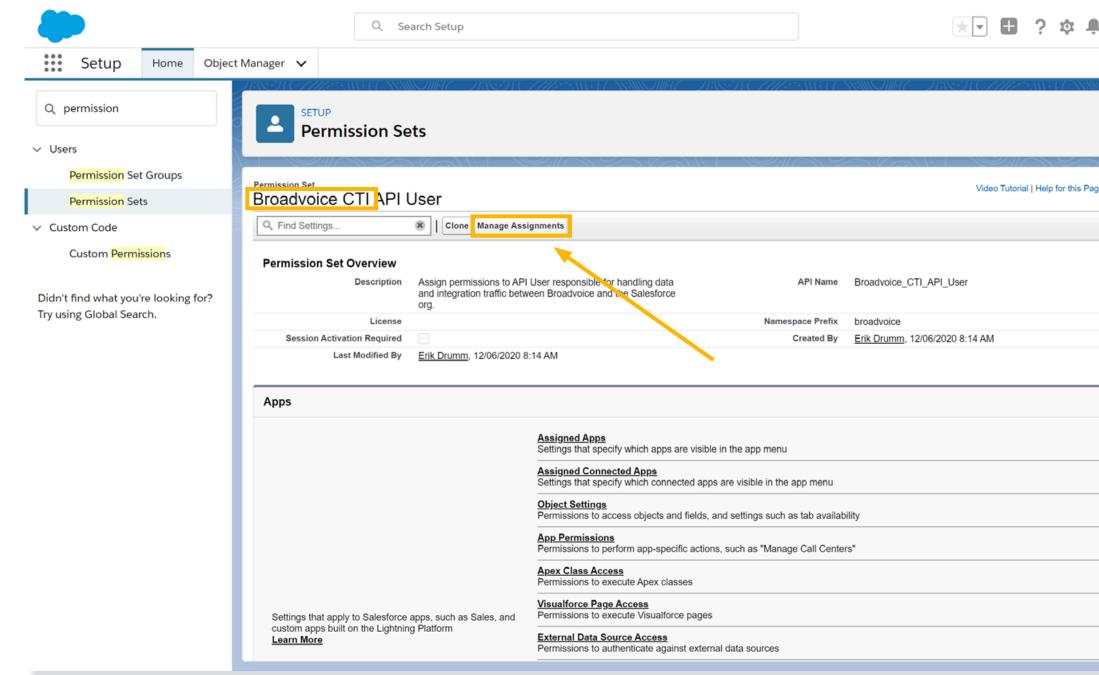
API User

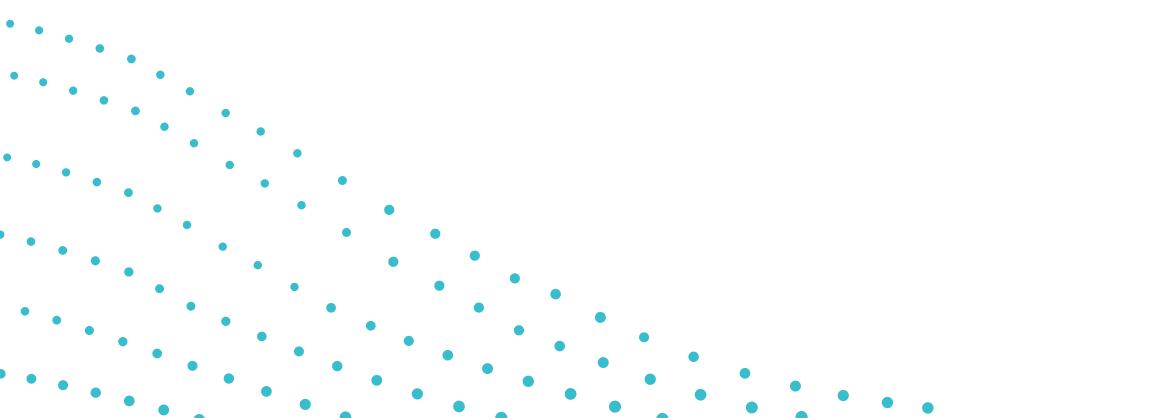
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The API User Permission Set allows Salesforce administrators or API Users to link custom elements to your b-hive account. To add, navigate to **Permission Sets** in Setup, and assign to the desired user.

Broadvoice User

The Broadvoice CTI Permission Set allows access to missed calls which is a custom object available with the CTI. To add, navigate to **Permission Sets** in Setup and assign to the desired user(s).





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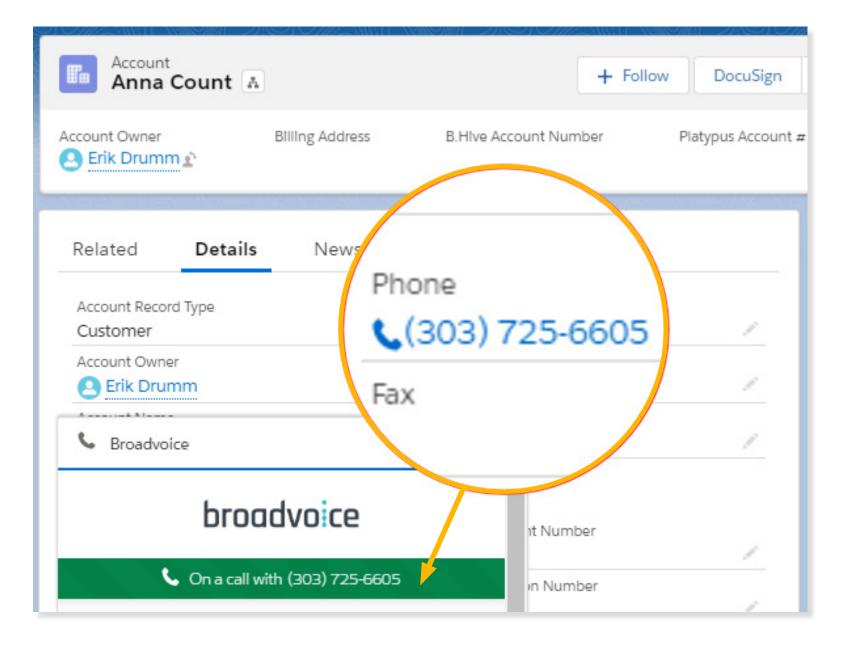
PLACING CALLS

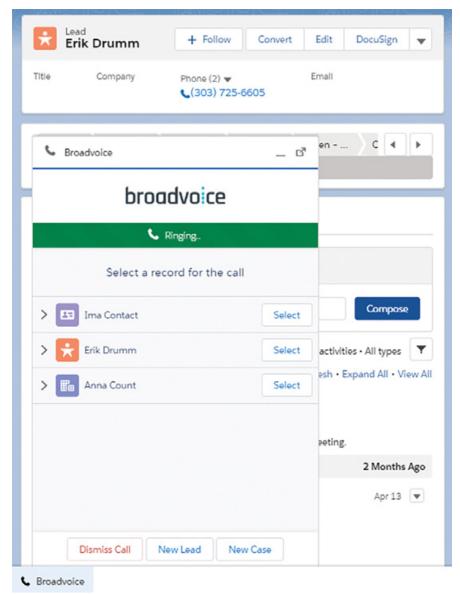
Navigate to the record you would like to have the call activity logged in and click the phone icon next to the number you wish to dial. This will initiate a call to your devices. Answering will then place the call. The CTI will show you on a call with the number. Here, you can add a call disposition and/or notes for future reference and click **Save Details**. To add additional notes to a call, simply type the notes and click **Save Details** again. To bypass call logging, simply click **Dismiss Call** at the bottom.

RECEIVING CALLS

Incoming calls will attempt to match the calling party number with records in Salesforce. These records can be contacts, accounts, leads, or cases. If multiple records are matched, click **Select** next to the record you would like to have the call activity saved in. Clicking on the name will give basic detail so you can select the correct record. Once you select the record, you can add a call disposition and/or notes for future reference and click **Save Details**. If you need to add further notes to a call before it is ended, simply type the notes and click **Save Details** again. To bypass call logging, simply click **Dismiss Call** at the bottom.

* Calls received while on an active call will be designated as 'missed calls'.





CREATING NEW RECORDS

You can easily create new leads or cases from inbound calls with the click of a button. Once the lead or case is created, you can then add a call disposition and notes to the call activity itself.

Leads

To create a new lead, click **New Lead**. Lead information will auto-fill based on the caller ID information if available. From here, simply add or update contact information, choose the lead status, and click **Create**. Once the lead is created, you can add information related to the specific call activity for reference later. >

>

Cases

To create a new lead, click **New Case**. The phone number will auto-fill based on the caller ID information if available and the channel will pre-fill to Phone. From here, add the subject and status. Optionally, you can search for an account or contact to associate the case with. Once the case is created, you can add information related to the specific call activity for reference later.

broadvoice			
📞 Ringing			
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