

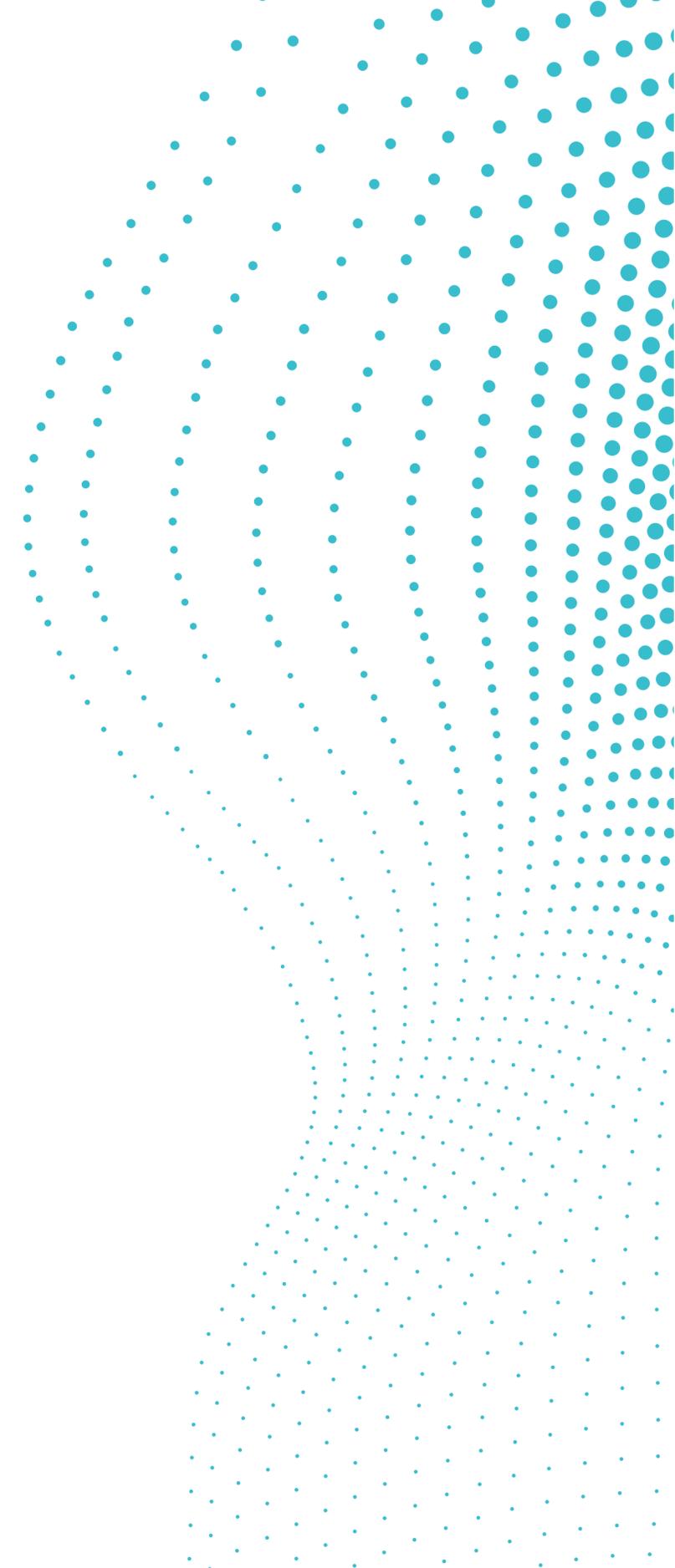
broadvoice

SALESFORCE INTEGRATION

Product Guide

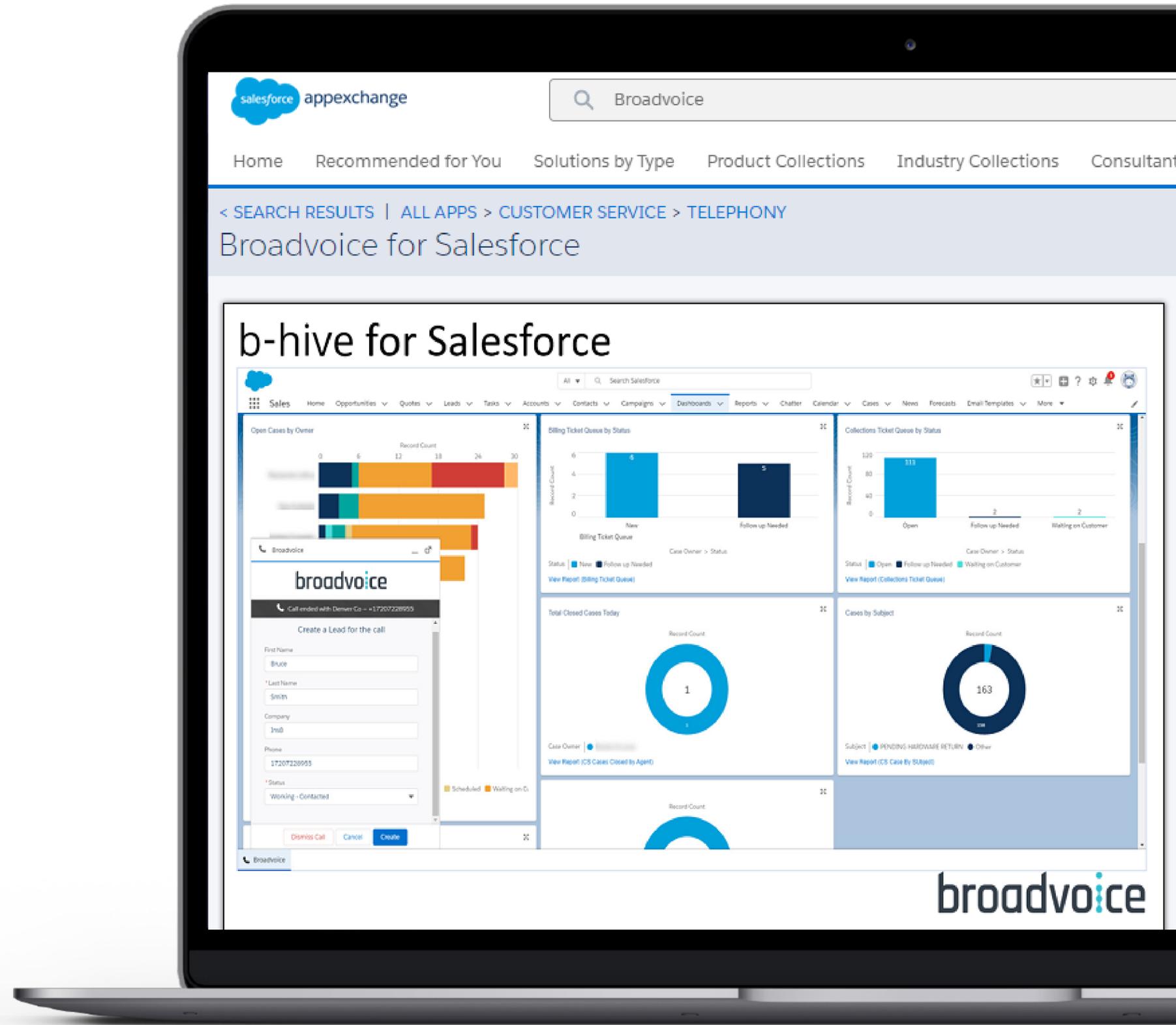
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INTRODUCTION

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.



broadvoice

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

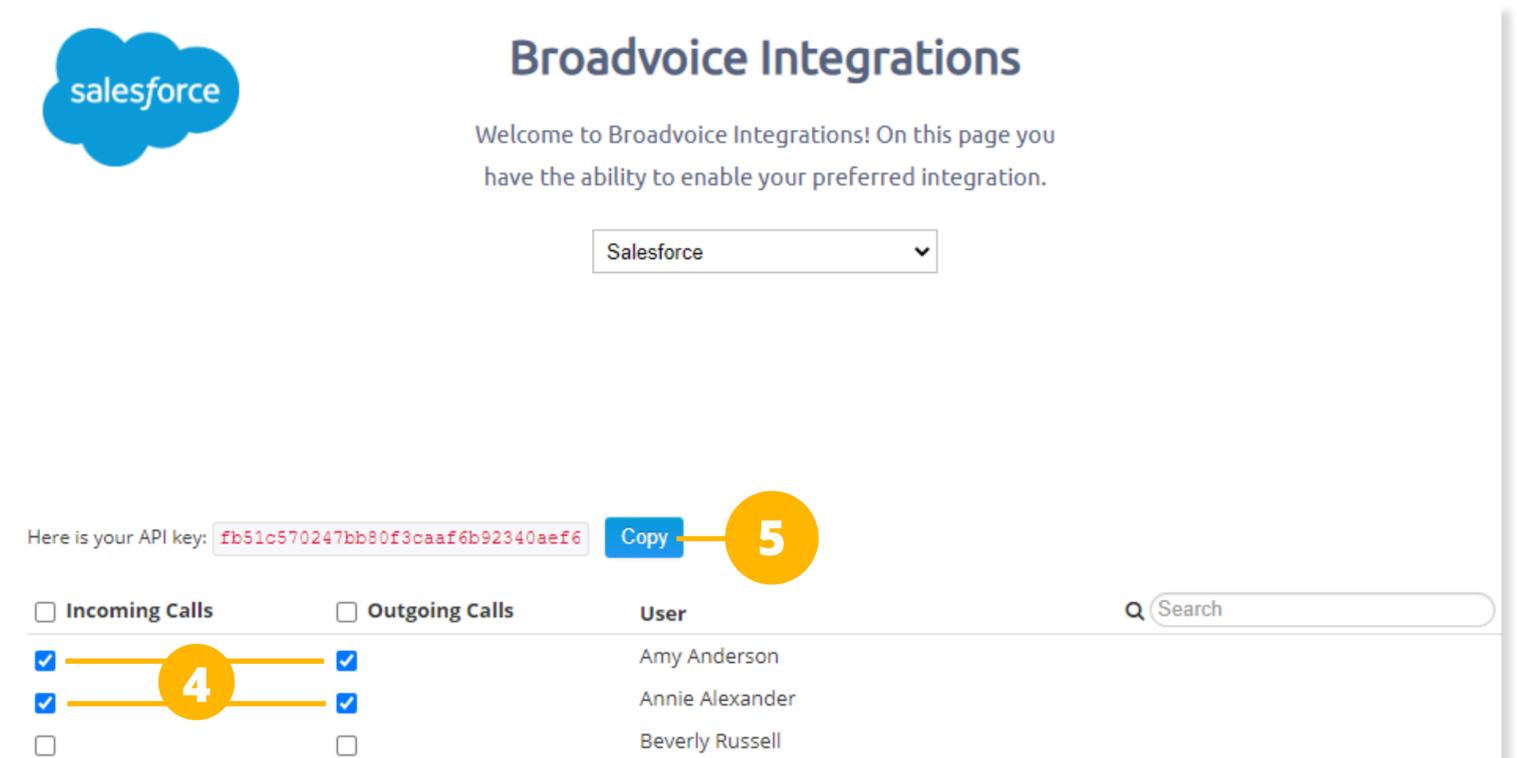
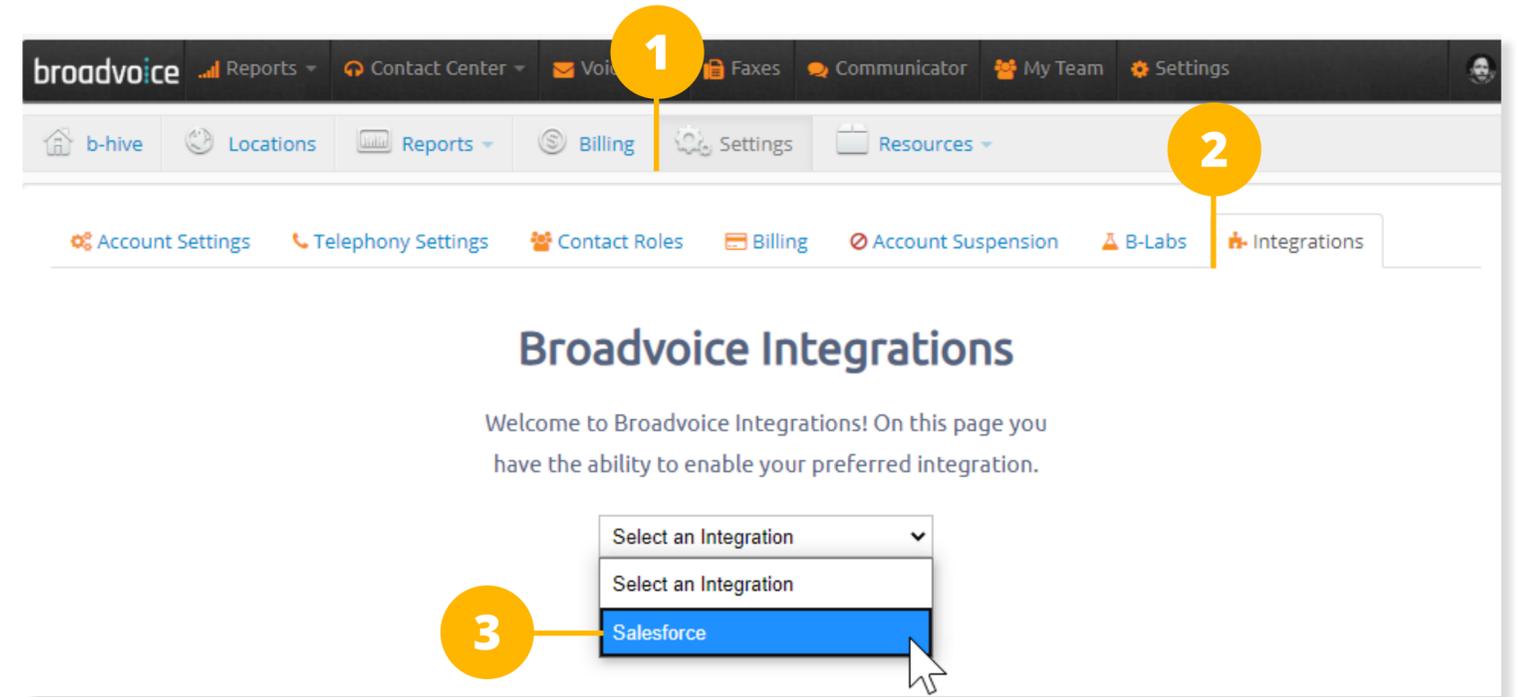
- Active Broadvoice b-hive account
- User(s) must have an integration-enabled Pro seat
- Active Salesforce account (Professional, Enterprise, and Unlimited)
- Integration users added to Salesforce call center

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.

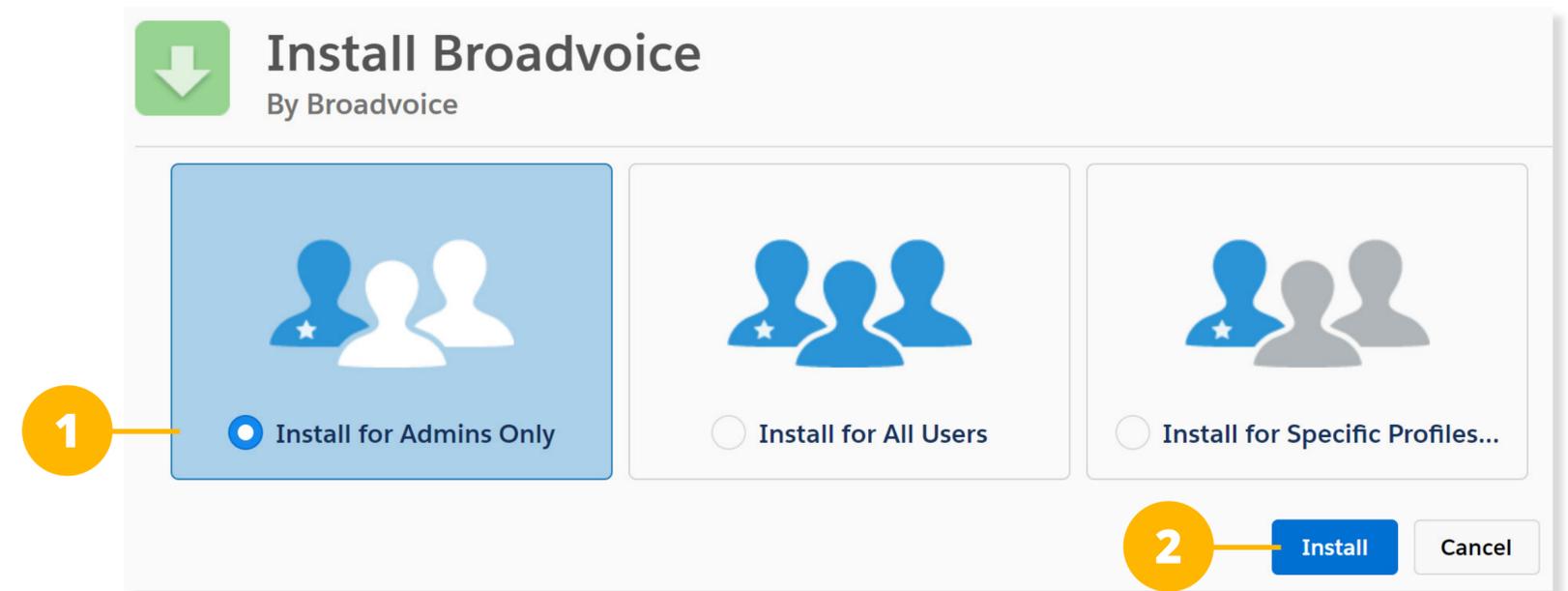
1. Select the **Settings** tab
2. Select the **Integrations** tab
3. Select **Salesforce** from Integrations drop-down
4. Select **Inbound /Outbound** for all users needing access
5. Copy **API Key** for later use



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**



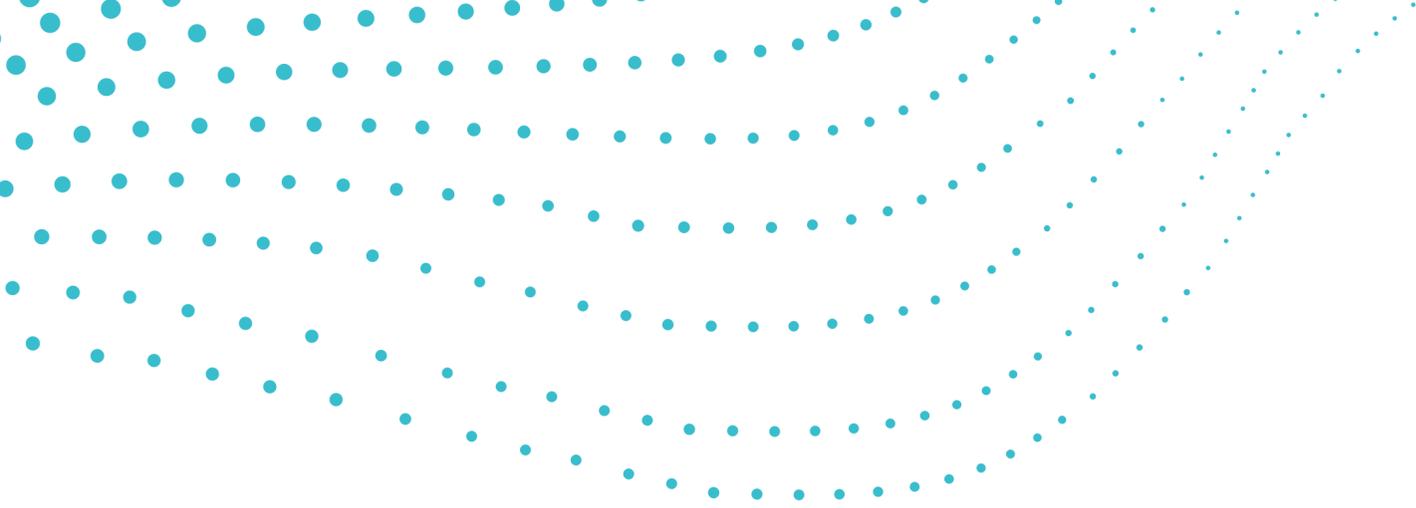
Approve Third-Party Access

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	<input checked="" type="checkbox"/>
login.salesforce.com	<input checked="" type="checkbox"/>
test.salesforce.com	<input checked="" type="checkbox"/>

Yes, grant access to these third-party web sites

Continue Cancel



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**

Setup Home Object Manager

Search Setup

Broadvoice

Apps

Broadvoice Setup

Installed Packages

Complete the sections below to set up the Broadvoice integration.

1 Get Started

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.

* API Key
fb51c570247bb80f3caaf6b92340aef6

Establish Inbound Connection
Authorize Broadvoice to send data to your Salesforce org

✓ Successfully authorized!

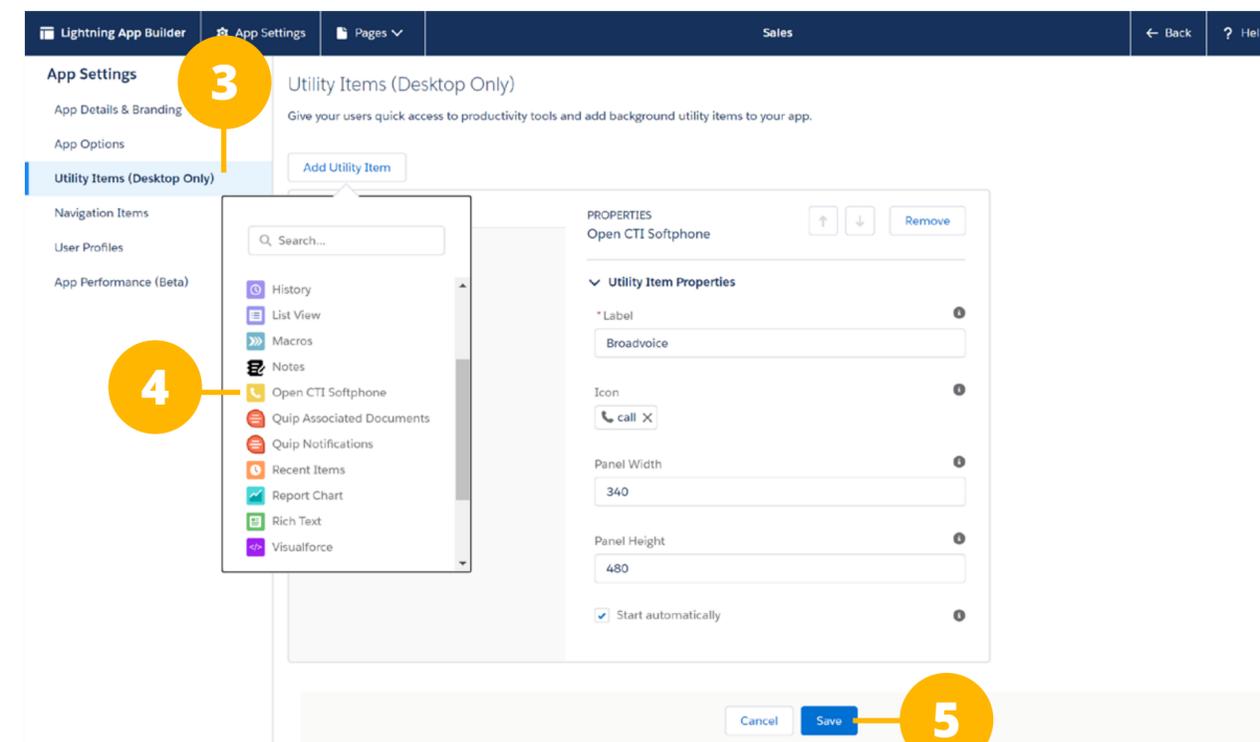
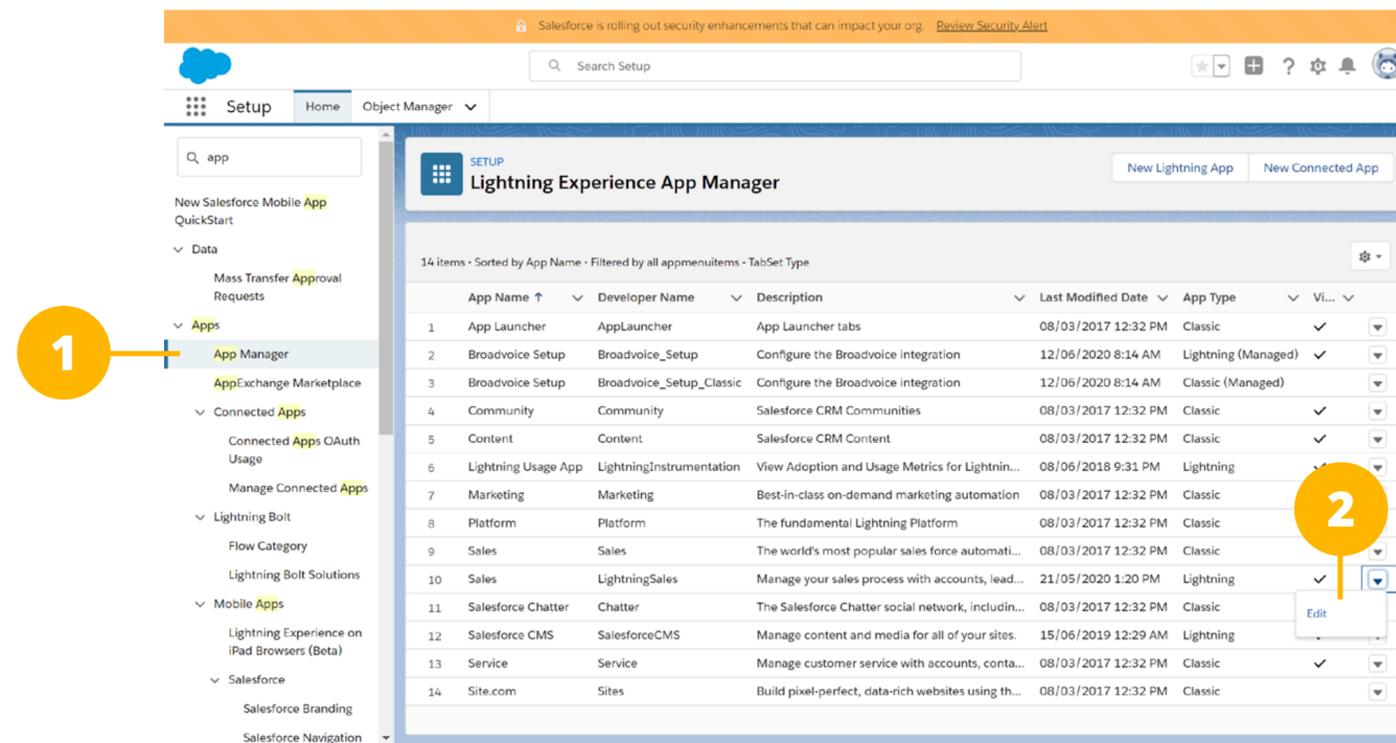
3 Reauthorize

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.



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

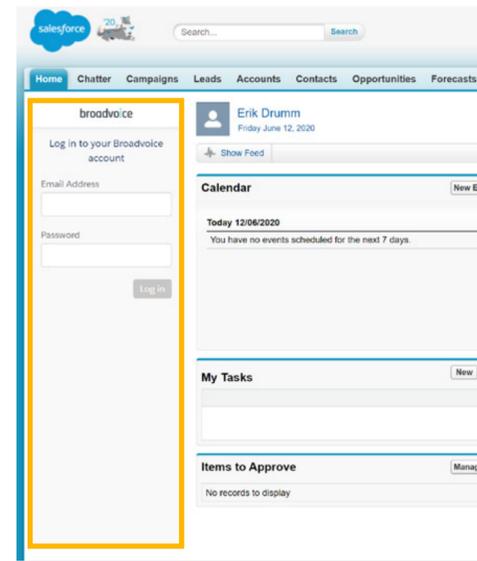
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'call' and a list of options: Feature Settings, Service, Call Center, and Call Centers (highlighted with a yellow circle 1). Below 'Call Centers' are 'Directory Numbers' and 'Softphone Layouts'. The main content area is titled 'Call Centers' and contains a table with one row: 'Broadvoice' (highlighted with a yellow circle 2). Below the table is a 'Call Center Users' section with a 'Manage Call Center Users' button (highlighted with a yellow circle 3).

The screenshot shows the 'Manage Call Center Users' page. It features search criteria fields (highlighted with a yellow circle 4) and a 'Find' button. Below the search area is a table of users with checkboxes for selection. The table has columns for Full Name, Alias, Username, Role, and Profile.

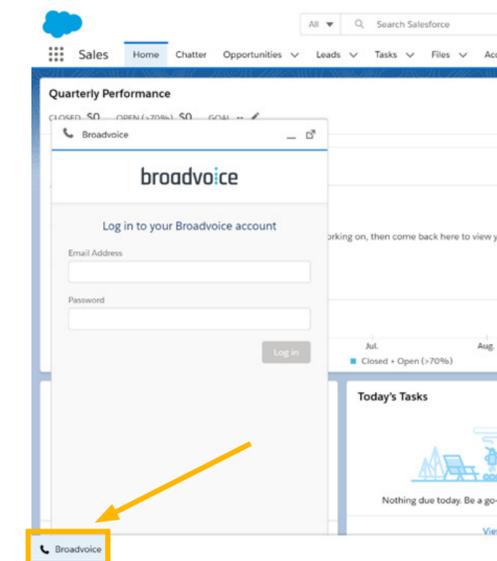
	Full Name	Alias	Username	Role	Profile
<input checked="" type="checkbox"/>	Adamsen, Adam	aadam	aa@adamsen.adam		Standard Platform User
<input type="checkbox"/>	Drumm, Erik	EDrum	erik.drumm@yiptel.com		System Administrator
<input type="checkbox"/>	Eden, Eric	eeden	eric.eden@yiptel.com	Customer Support, North America	Standard Platform User
<input type="checkbox"/>	Test Implementations	iteam	amanda@yiptel.com		System Administrator

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.



Classic

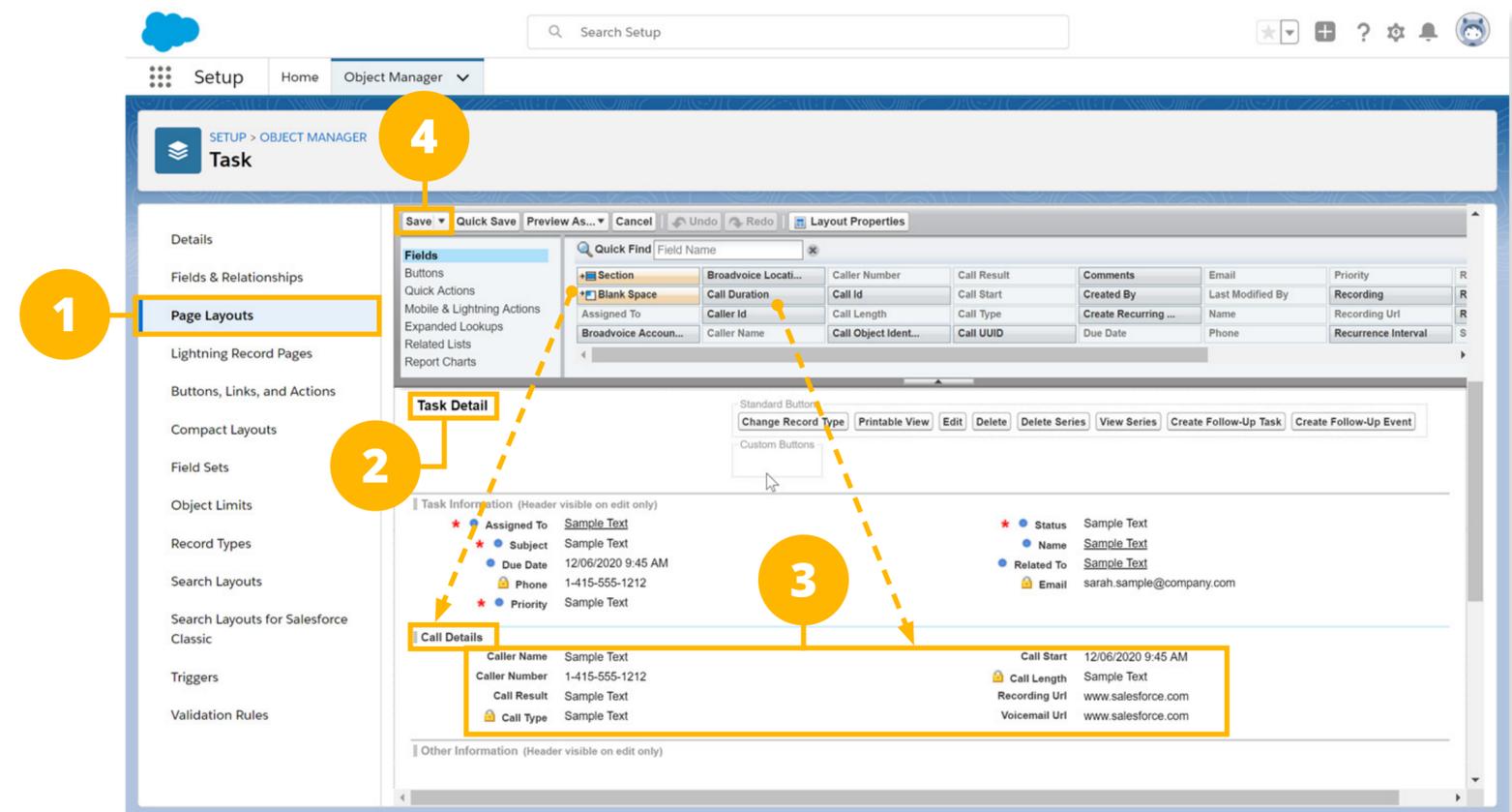


Lightning

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**



PROFILE PERMISSION SETS

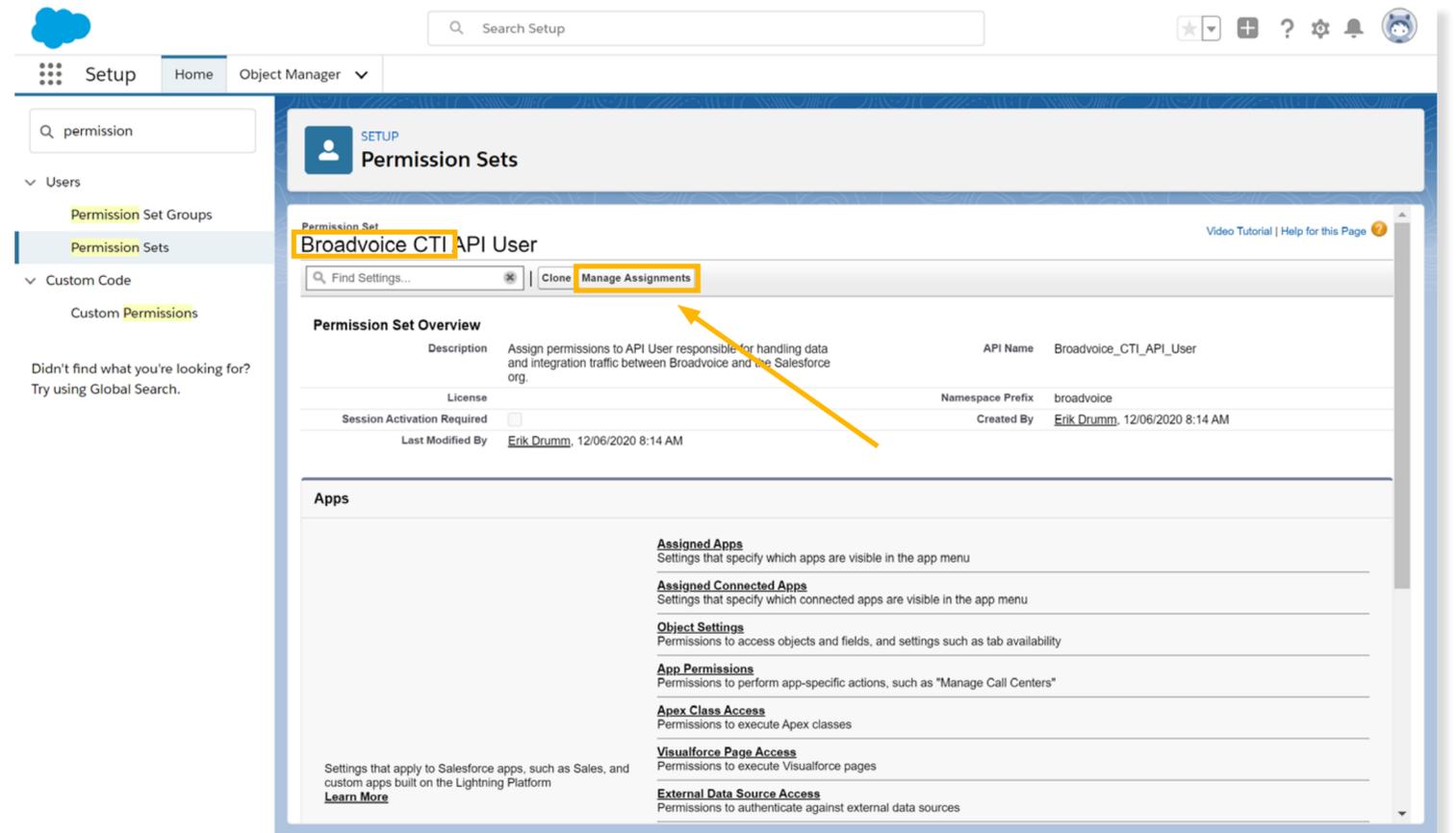
The CTI package requires user profile access to many fields. For some organizations, these fields might be restricted based on the configuration of Salesforce. To easily grant access, you can assign permission sets provided upon installation of the CTI package.

API User

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.

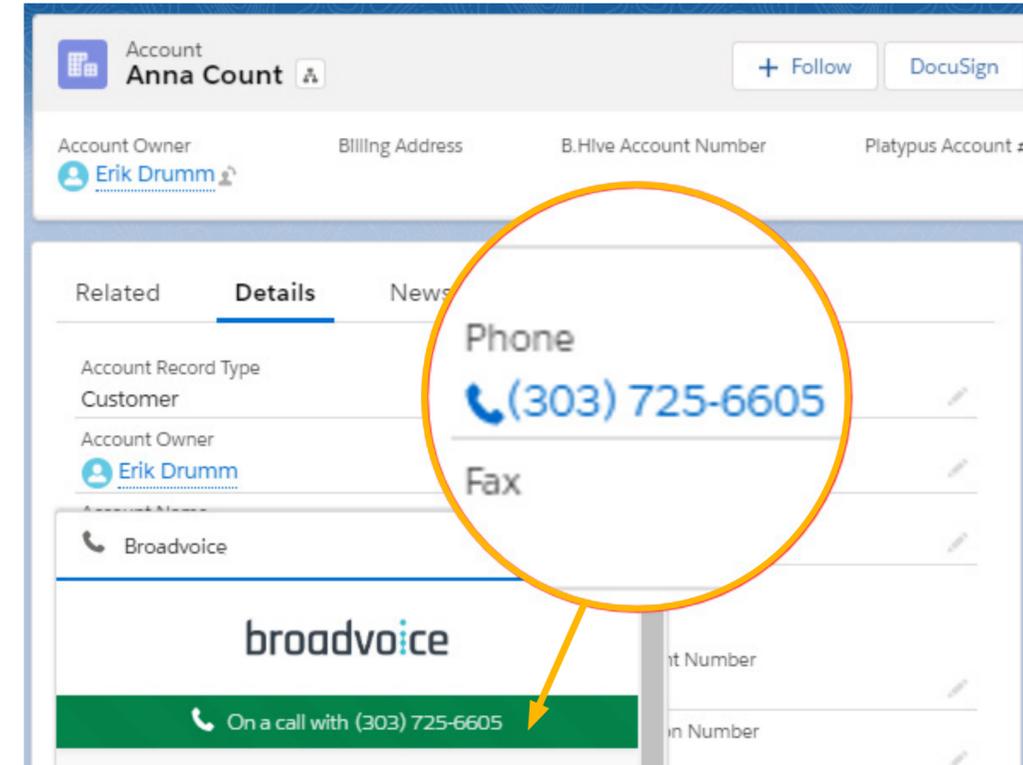
Broadvoice User

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).



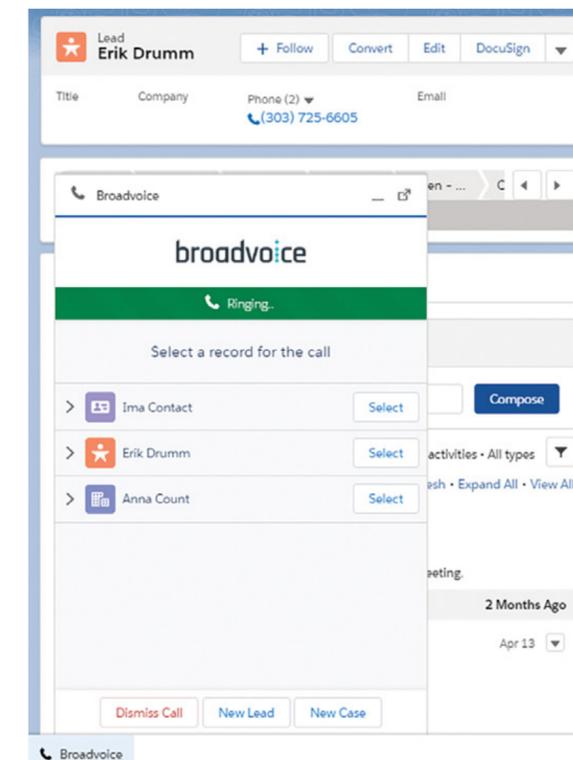
PLACING CALLS

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.

The image displays three sequential screenshots of the Broadvoice interface during an inbound call. The first screenshot shows a 'Ringing...' status with a list of contacts: 'Ima Contact', 'Erik Drumm', and 'Anna Count', each with a 'Select' button. At the bottom, there are buttons for 'Dismiss Call', 'New Lead', and 'New Case'. The second screenshot shows the 'Create a Lead for the call' form, which is pre-filled with information from the caller ID: First Name 'Erik', Last Name 'Drumm', Company 'Broadvoice', and Phone '13037256605'. The status is set to 'Working - Contacted'. The third screenshot shows the 'Create a Case for the call' form, pre-filled with Subject 'New Case', Status 'New', Severity 'Medium', Channel 'Phone', Account ID 'Big Mac', and Contact ID 'Ima Contact'. The phone number is '13037256600'. Yellow arrows indicate the flow of information from the 'New Lead' button in the first screenshot to the 'Create a Lead' form in the second, and from the 'New Case' button to the 'Create a Case' form in the third.

