
broadvoice

# SALESFORCE INTEGRATION

## Product Guide

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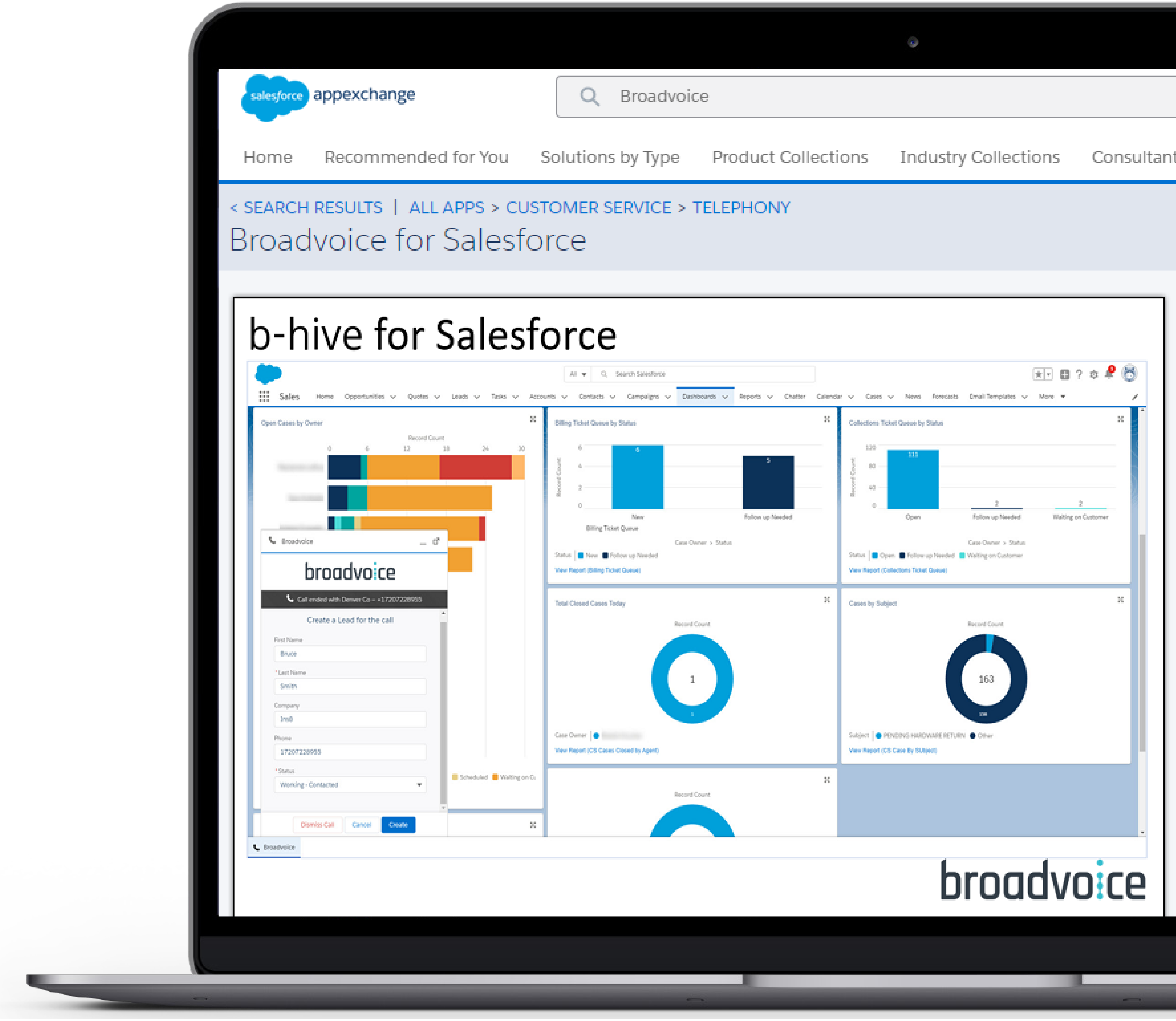
# INTRODUCTION

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.



# 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

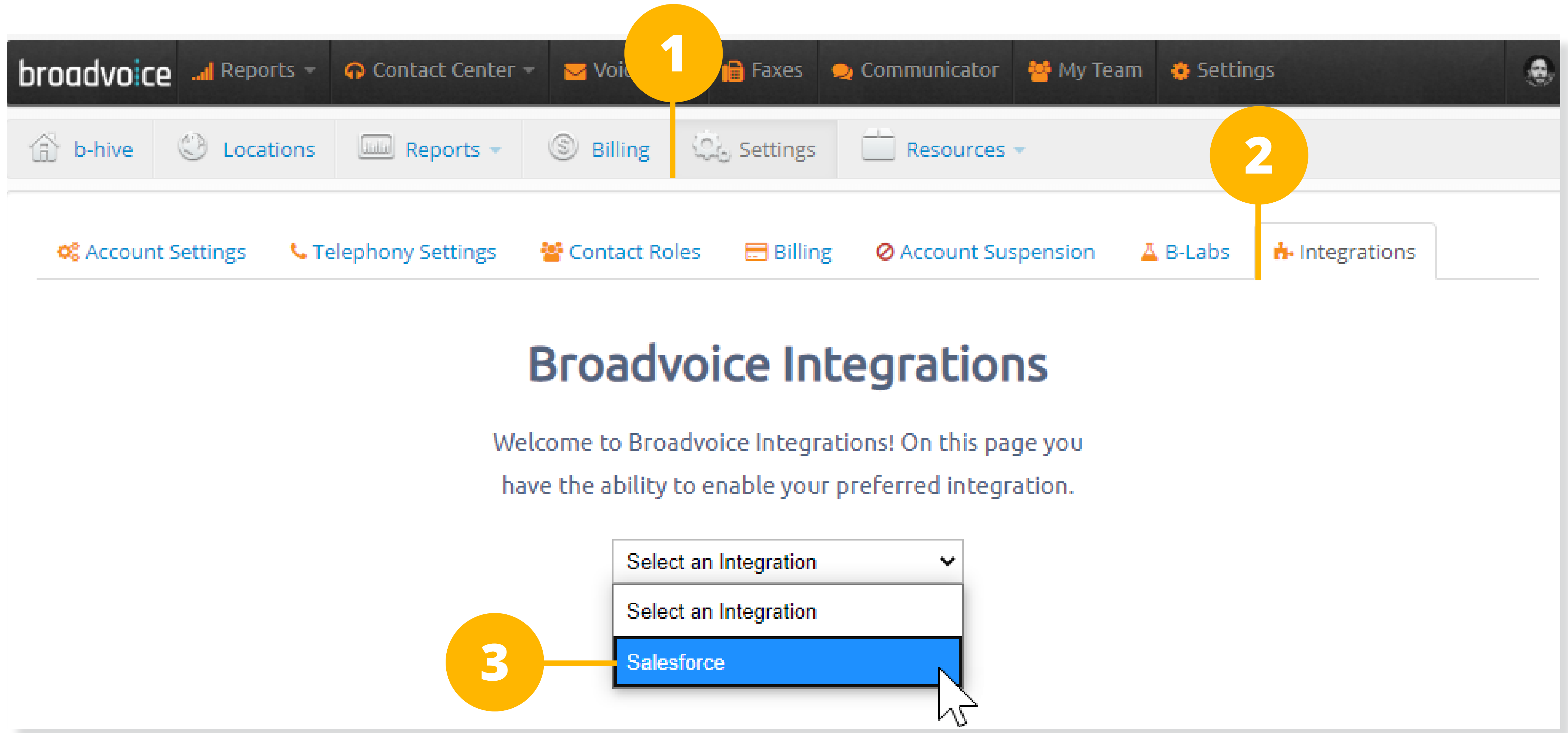
- Active Broadvoice b-hive account
- User(s) must have an integration-enabled Pro seat
- Active Salesforce account (Professional, Enterprise, and Unlimited)
- Integration users added to Salesforce call center

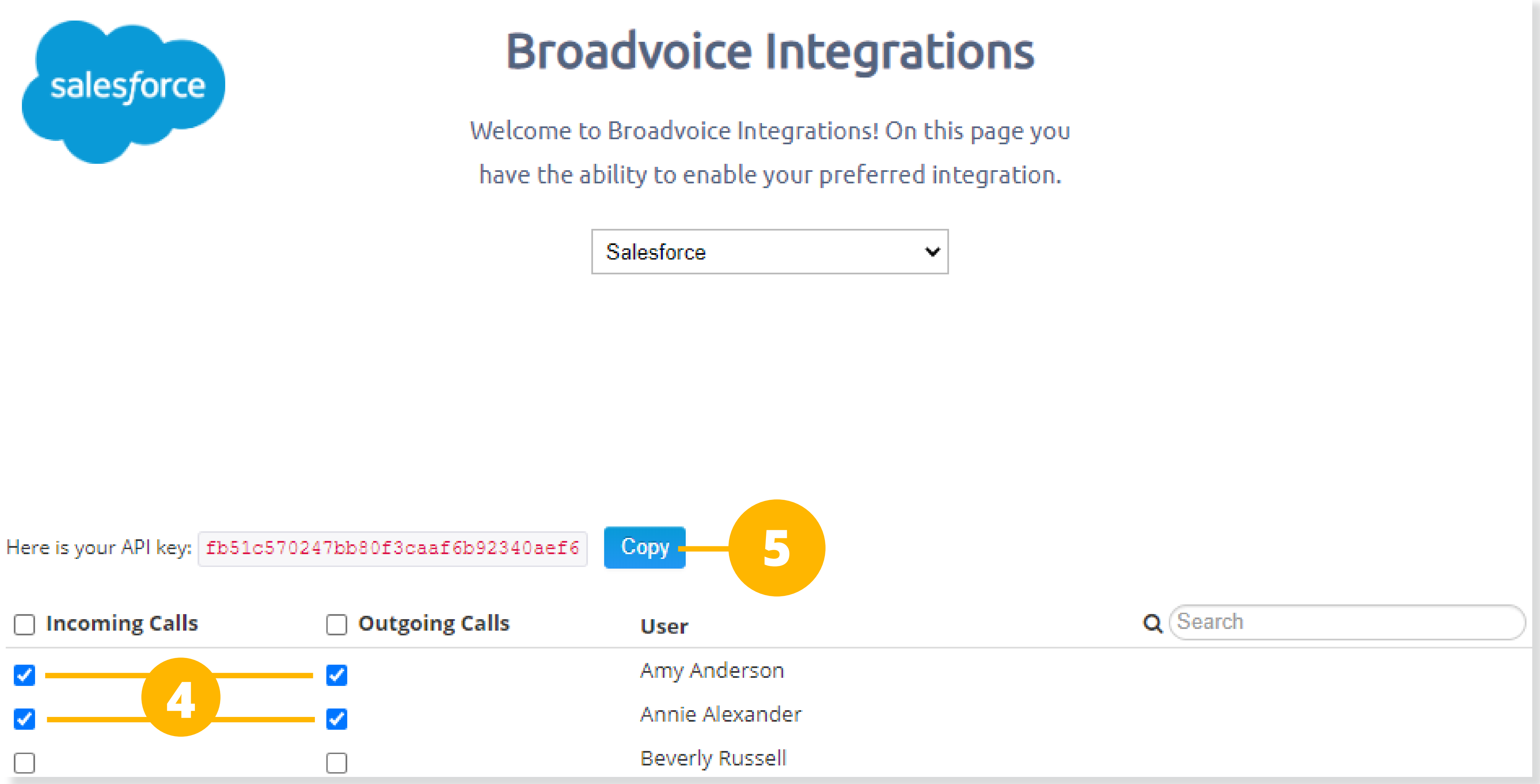
# INSTALLATION & SETUP

## 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

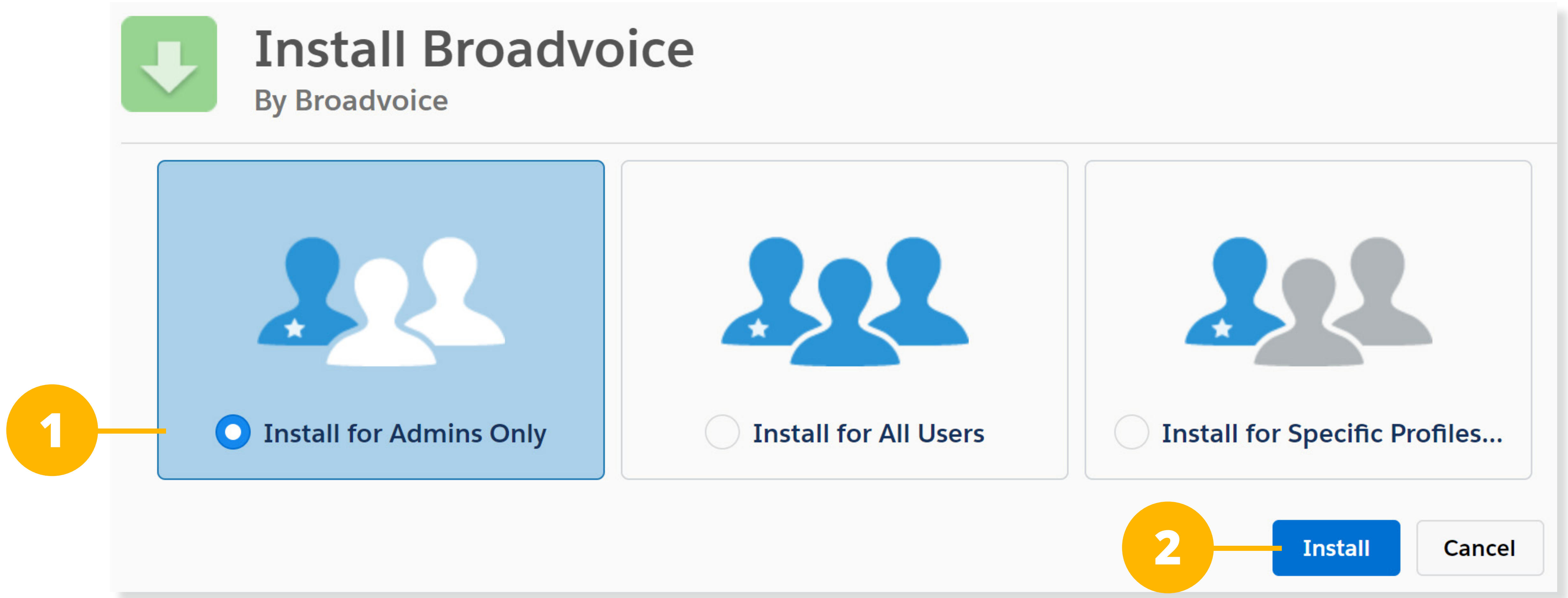


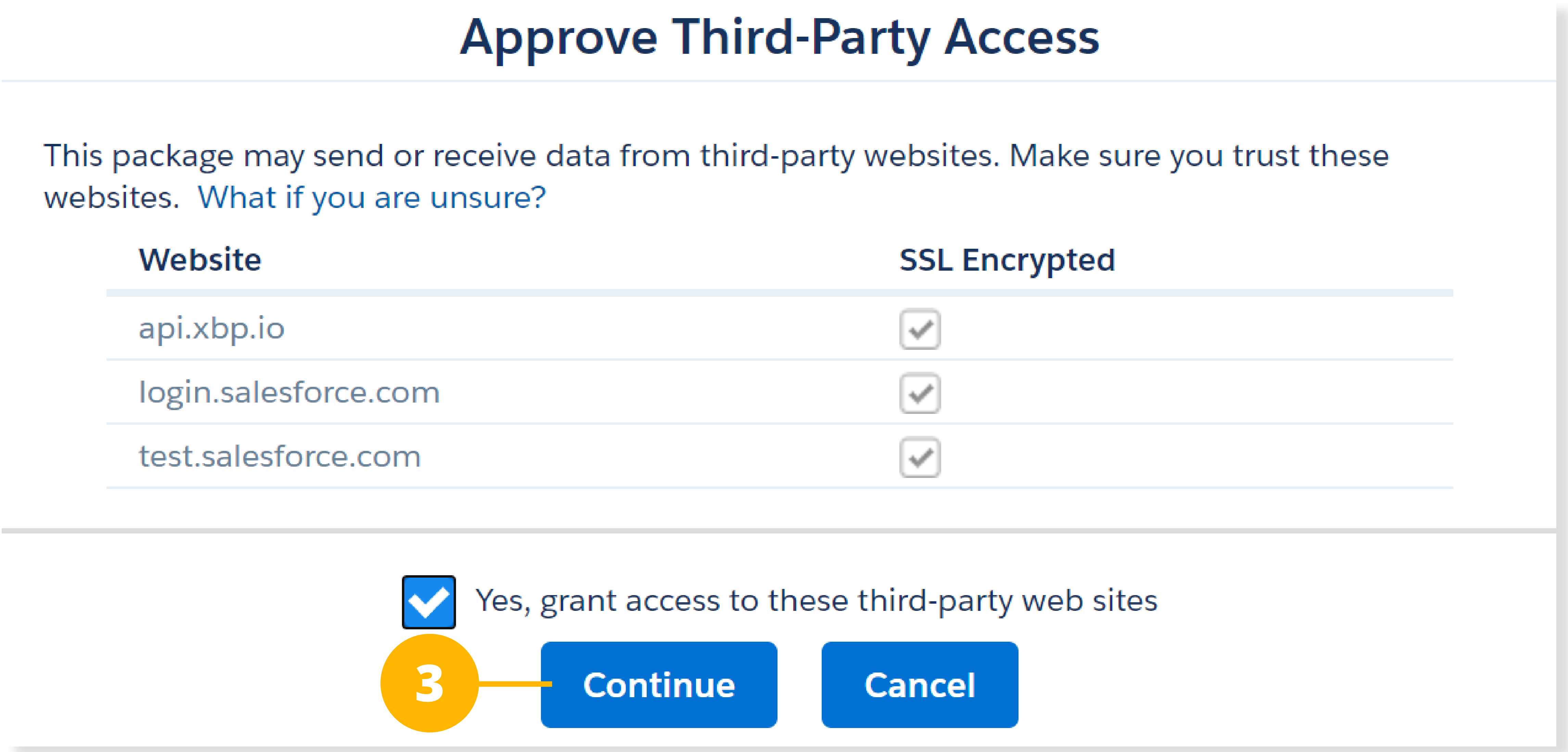



## INSTALLING IN SALESFORCE

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

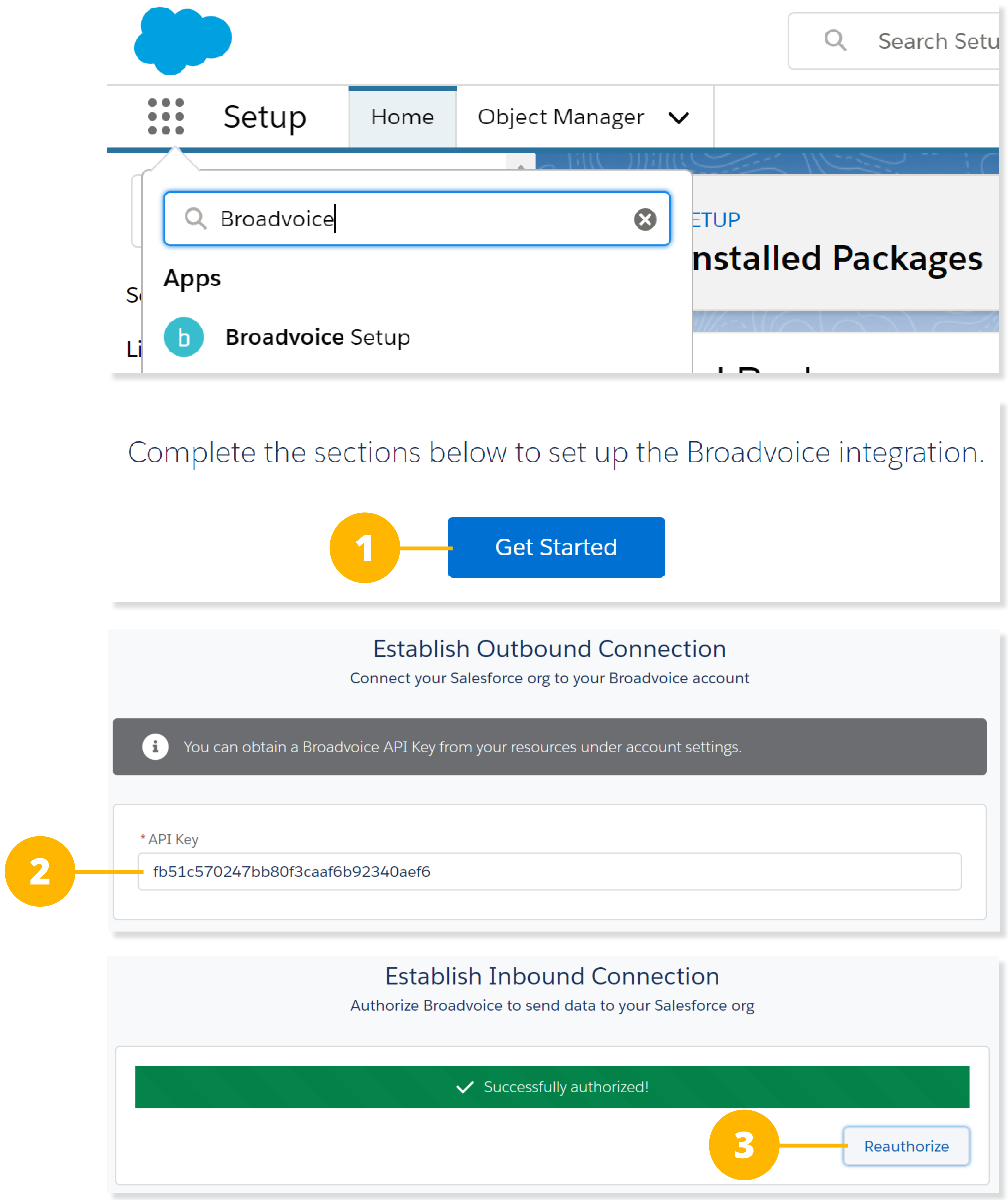
1. Select **Install for Admins Only**
2. Click **Install**
3. Grant third-party access and select **Continue**



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.

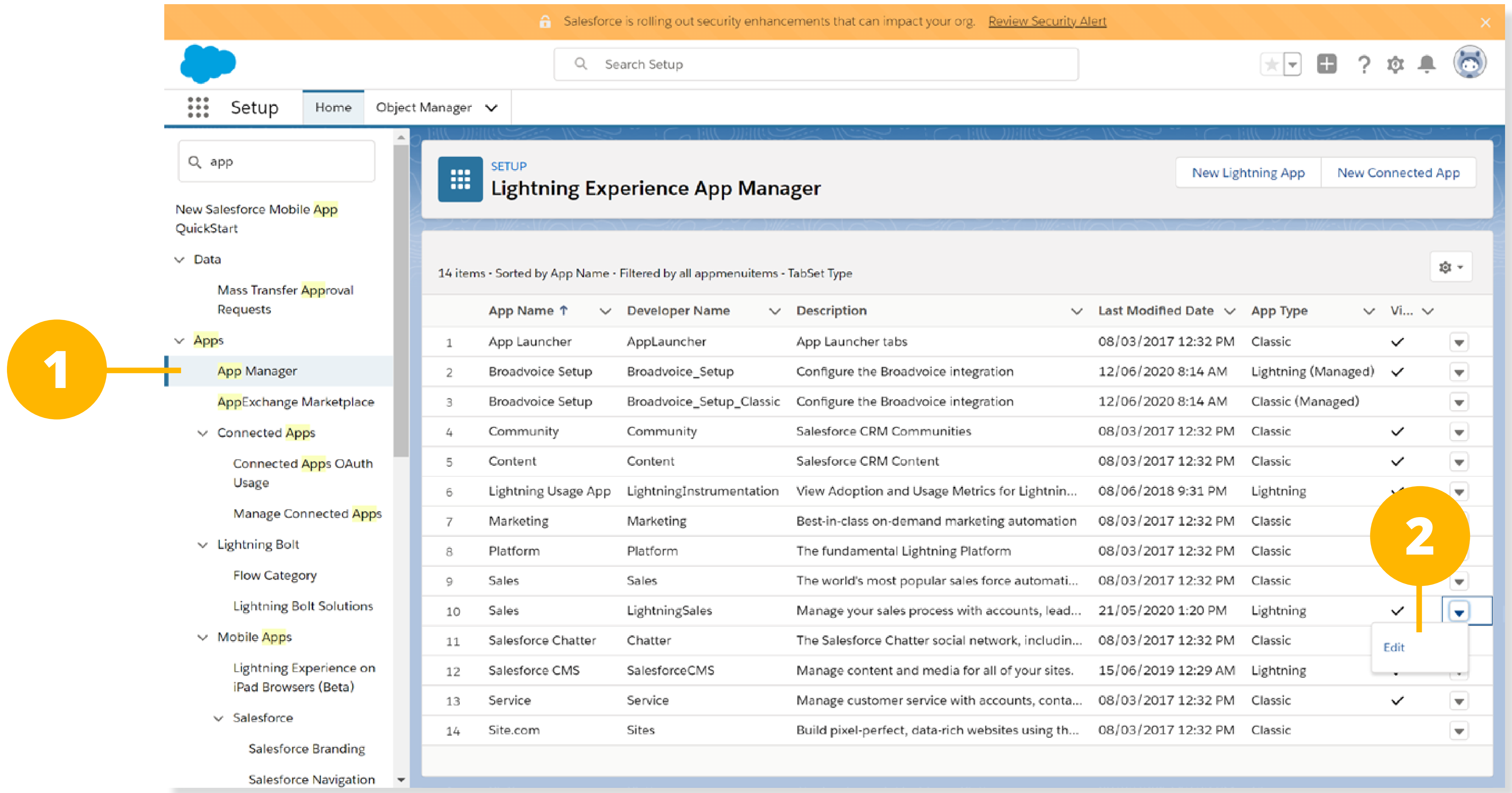
1. Click **Get Started**
2. Paste the **API Key** located on the b-hive integrations page
3. Click **Authorize**

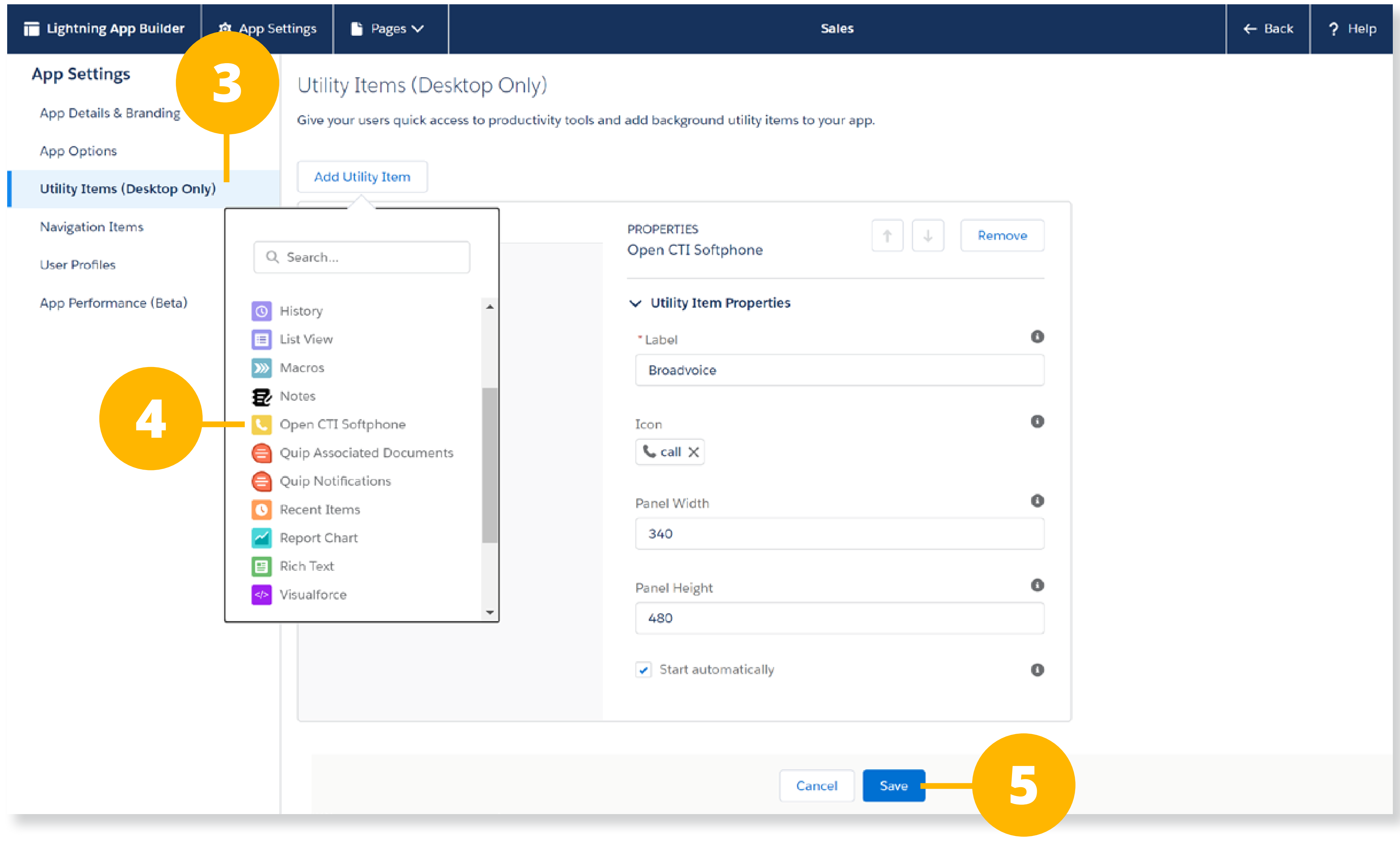


Then you'll need to add the CTI Softphone to the app your company uses within Salesforce (Lightning Only)

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.

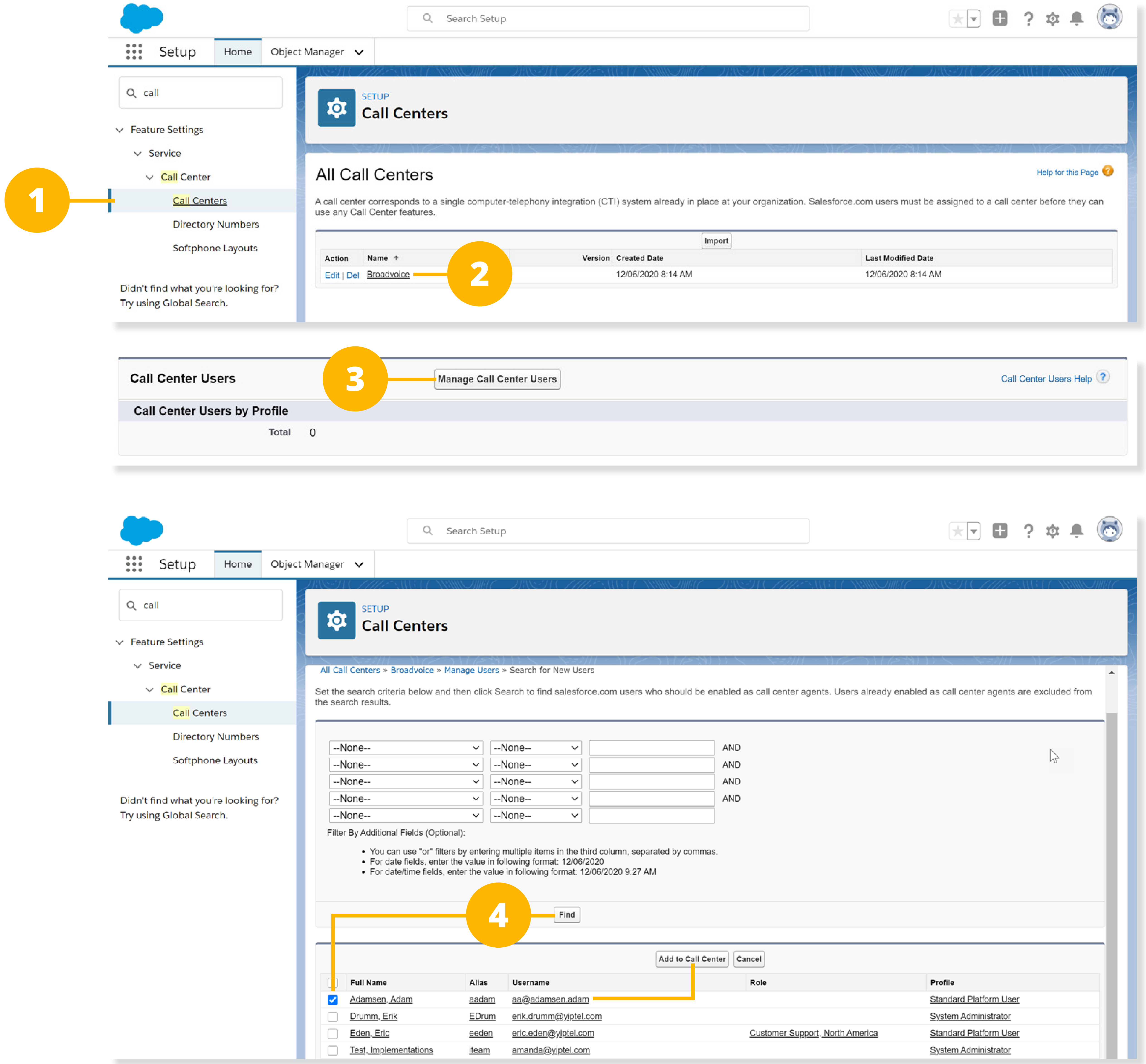



* Note: Changing the Softphone Label to 'b-hive' or 'Broadvoice' can help identify its location for users.

## ENABLING SALESFORCE USERS

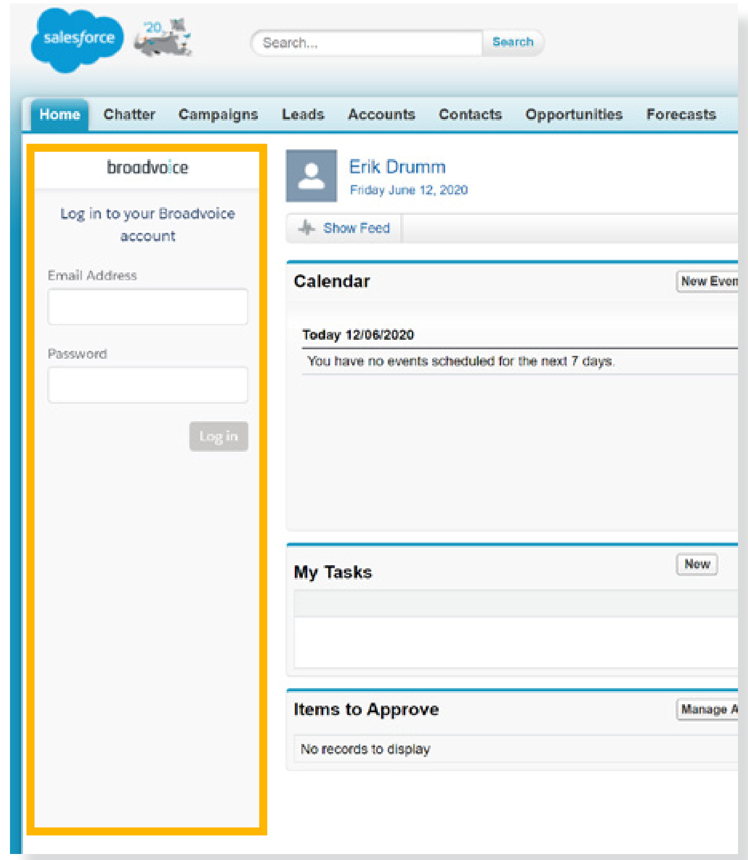
You’ll need to designate which users you would like to have access to the Broadvoice CTI.



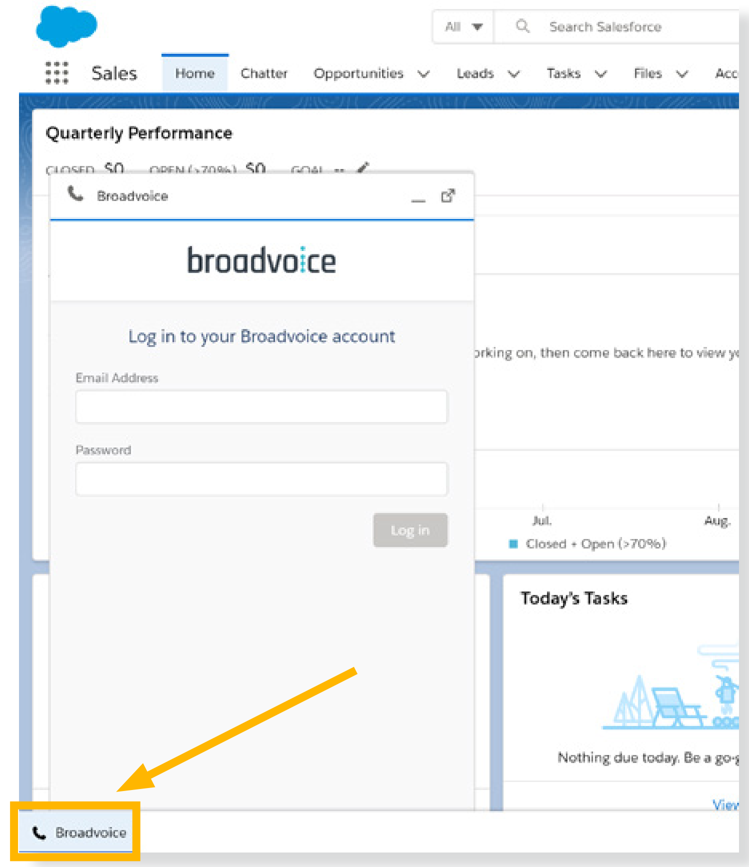

1. Select **Call Centers** under Setup
2. Click on **Broadvoice**
3. Click **Manage Call Center Users**
4. Find the users and add them to the Call Center

## 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

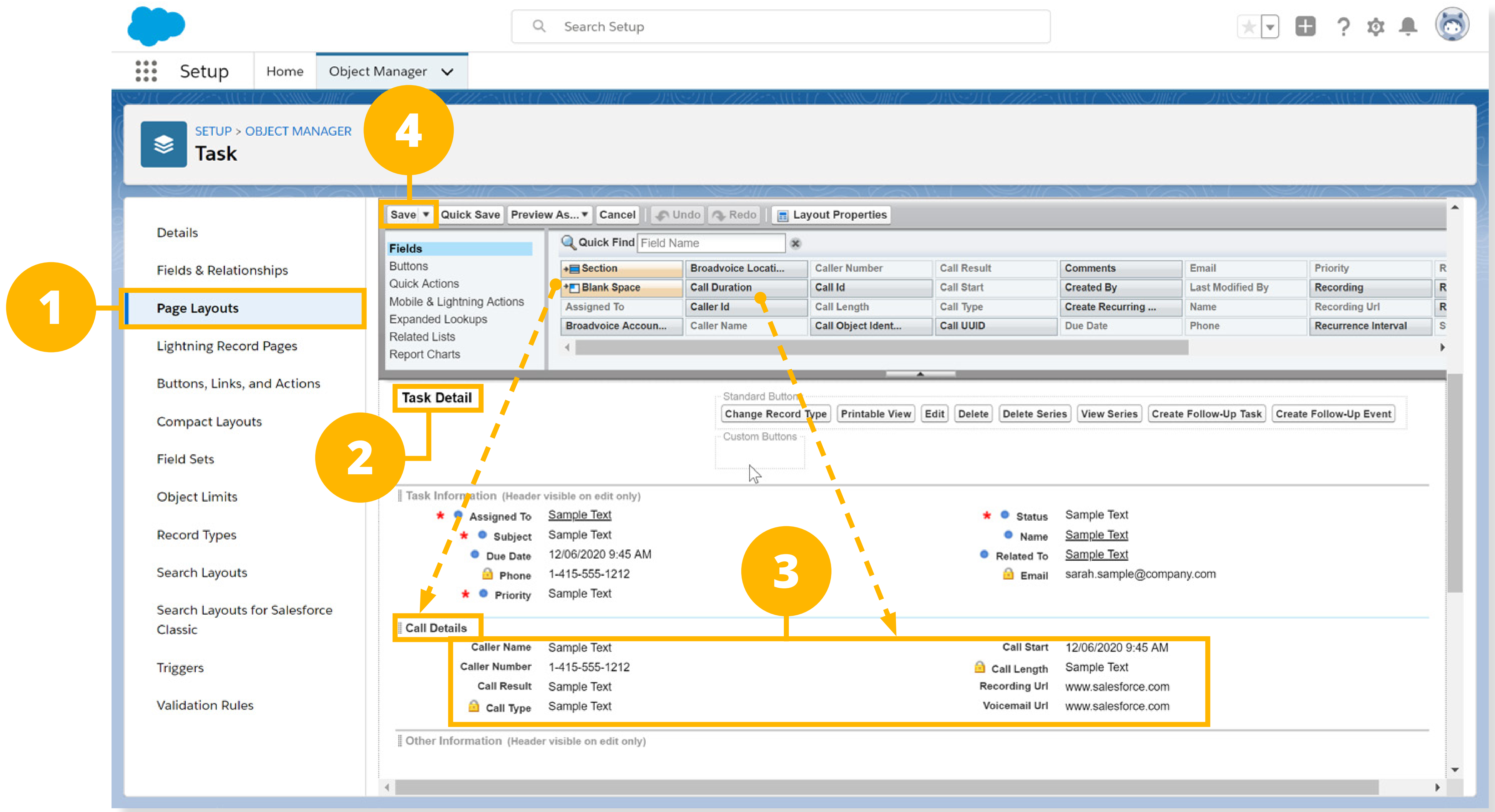



Lightning

## 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**

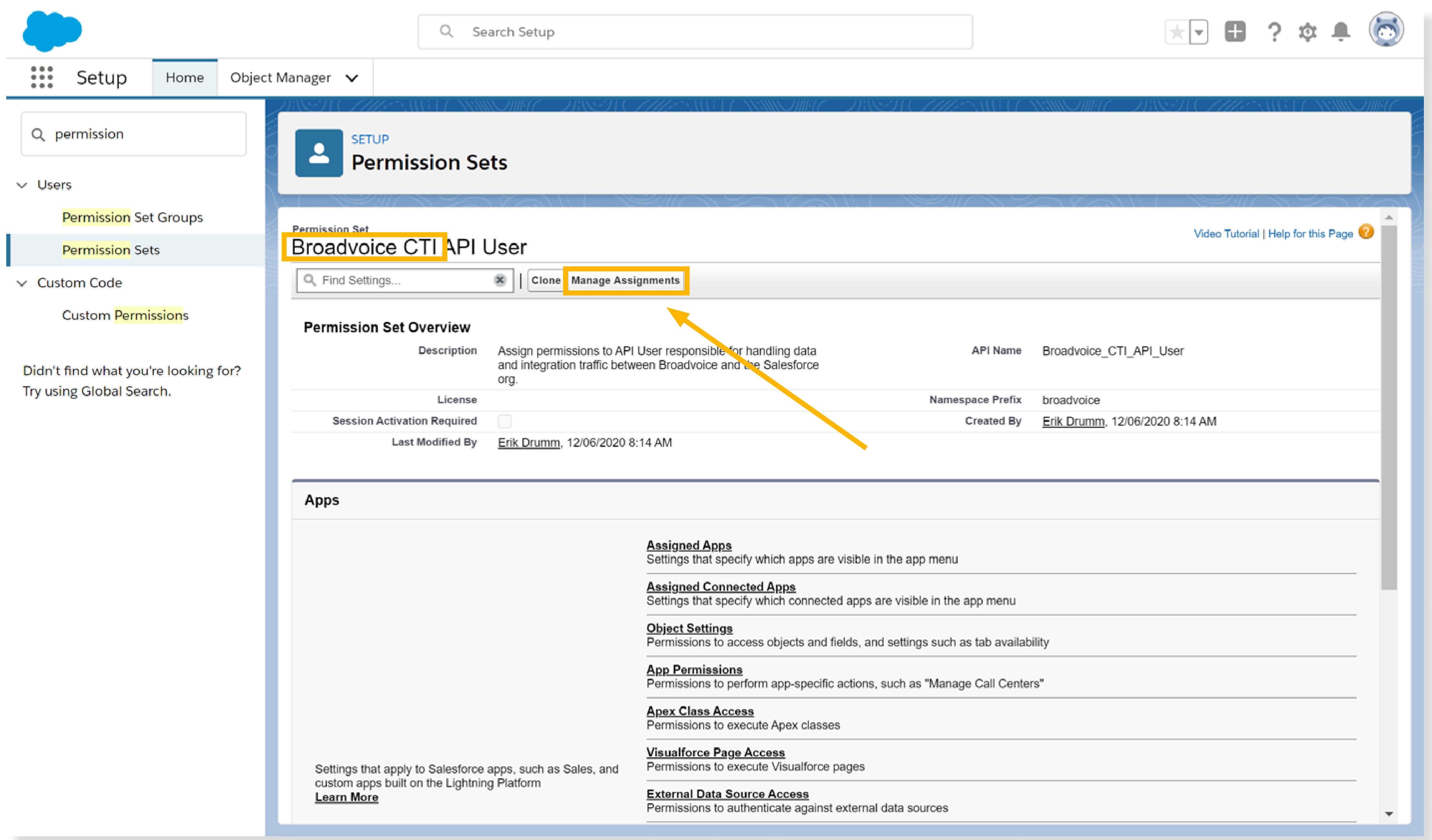


# PROFILE PERMISSION SETS

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.

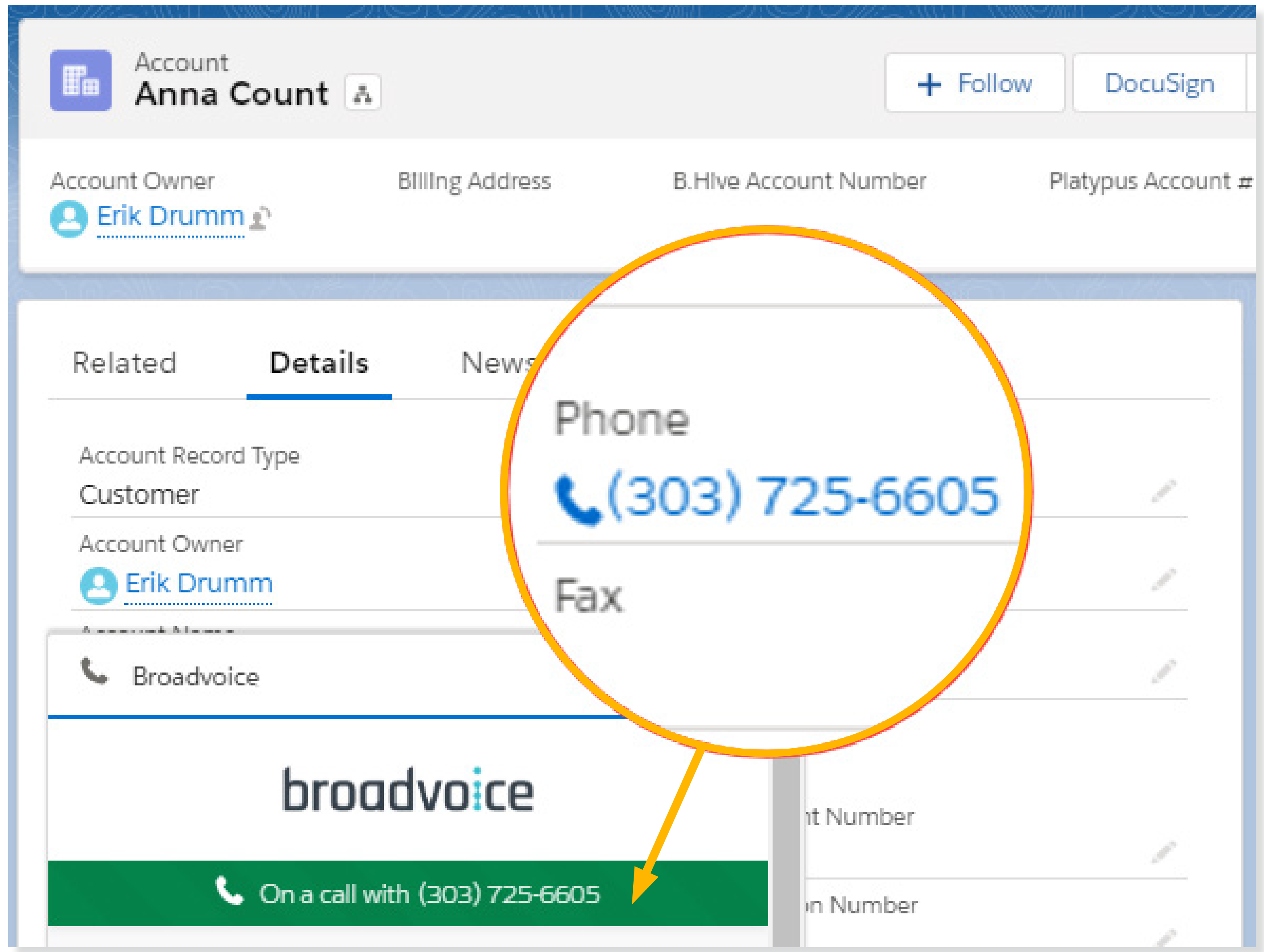
**API User**
The API User Permission Set allows Salesforce administrators or API Users to link custom elements to your b-hive account. To add, navigate to **Permission Sets** in Setup, and assign to the desired user.

**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).



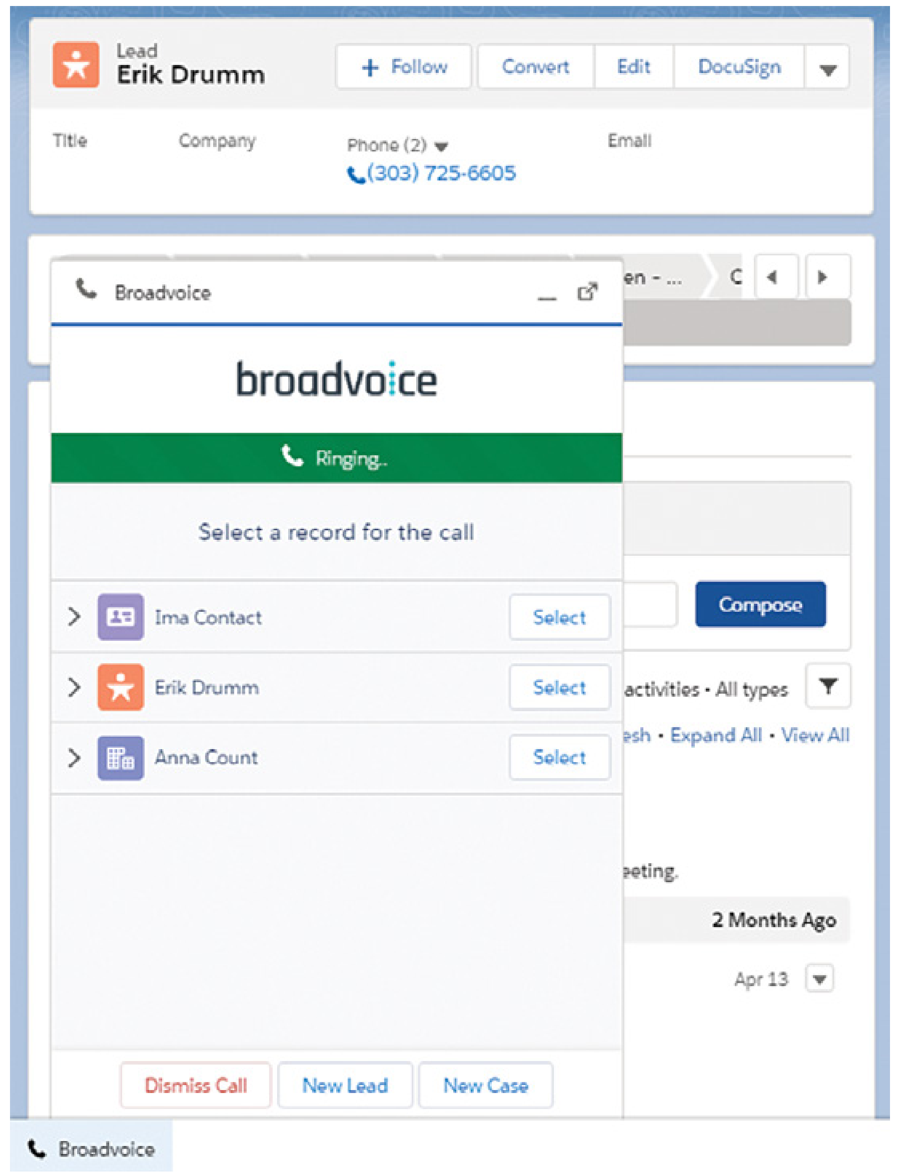
# PLACING CALLS

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.