ADMIN TRAINING GUIDE

OfficeSuite UC®
Connector for Salesforce

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Introduction

OfficeSuite UC® Connector for Salesforce integrates the OfficeSuite UC phone system with your Salesforce CRM. It allows you to communicate so that you can make calls directly from Salesforce, including having incoming call screen pop-ups and the ability to take notes and log calls.

OfficeSuite UC Connector for Salesforce will work on any OfficeSuite UC logged in device: desk phone, softphone and mobile apps.

Before you can start using this feature, you will need to install an XML file that corresponds with your version of Salesforce (Salesforce Classic or Salesforce Lightning). Please note that the local Salesforce Administrator will need to perform this function.

Operating system, hardware and software requirements

Browsers

- IE8+
- Google Chrome
- Mozilla Firefox
- Safari

Hardware

- Windows
- Mac OS
- Android
- iOS
- Linux

Salesforce versions

- Professional
- Enterprise
- Unlimited
- Developer
    - Salesforce Classic
    - Salesforce Lightning

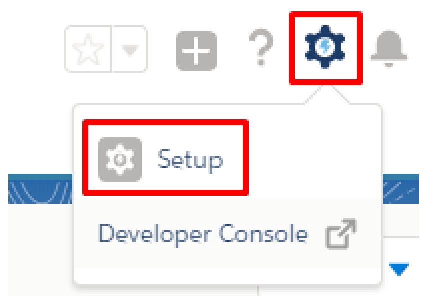
Configuring Salesforce to work with OfficeSuite UC Connector for Salesforce

This section details how to configure the integration of your Salesforce and OfficeSuite UC system. These steps assume that you already have a Salesforce account and are the local Administator.

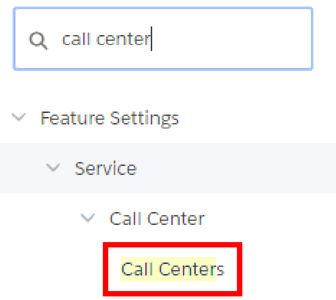
Before beginning, ensure you have completed the following:

- Pop-ups are enabled in your browser.
- During the launch, set-up, or use of Salesforce, if Internet Explorer prompts you with the following pop-up security warning, “Do you want to view only the webpage that was delivered securely?” answer **No**.
- Received the OfficeSuite UC Call Center XML file and saved it on your local computer.

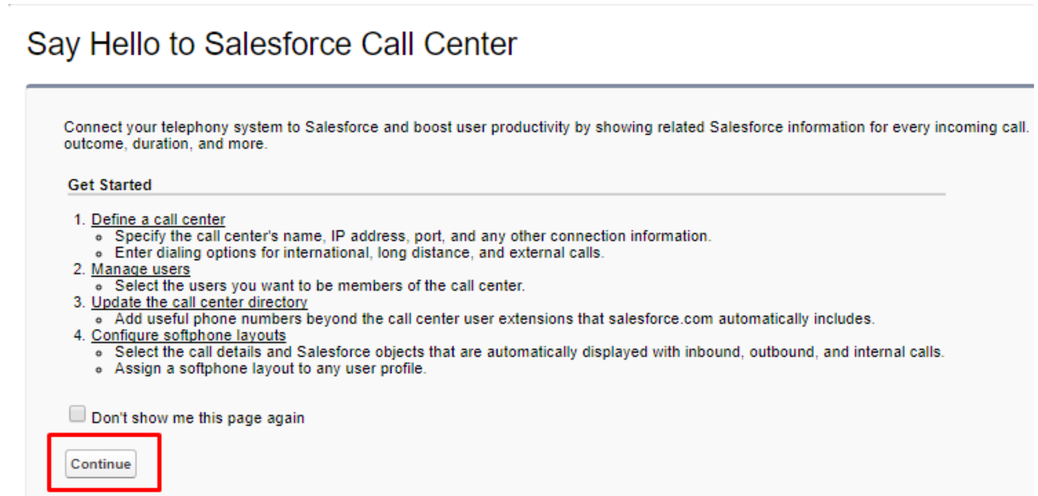
1. Open a web browser, go to Salesforce.com, and log in.
2. Click your name in the upper right-hand corner of the homepage and from the drop-down list, choose **Setup**.



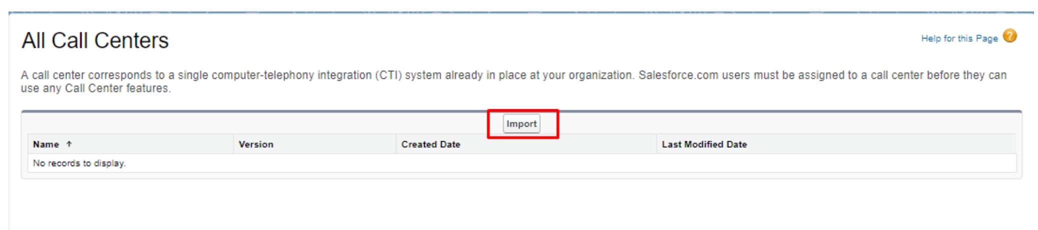
3. In the Navigation pane on the left-hand side of the page, type in call center. Select **Call Centers**.



4. From the Call Center page, click **Continue**.



5. Click **Import**.



6. Click **Choose File**. Locate the OfficeSuite UC Call Center XML file on your desktop. Click **Import**.

7. Click **Home** on the top left of the page.

8. Navigate back to the Call Centers page, then click **Edit** in the Action column next to the newly uploaded Call Center file. You may have to click **Continue** first.

9. Scroll down to the OfficeSuite UC Setup section and enter in your **Tenant Account Number**. Your Tenant Account Number is provided at the early stages of your Provisioning process and is received via email from your Project Manager. Your Tenant Account Number can also be found on your bill. Here is an example of what it looks like: 212555AABB. The remaining fields will already be pre-filled in with defaults.

   Softphone Height – Change to 345

   Minimum Search Number Length – It is recommended you leave this at 7

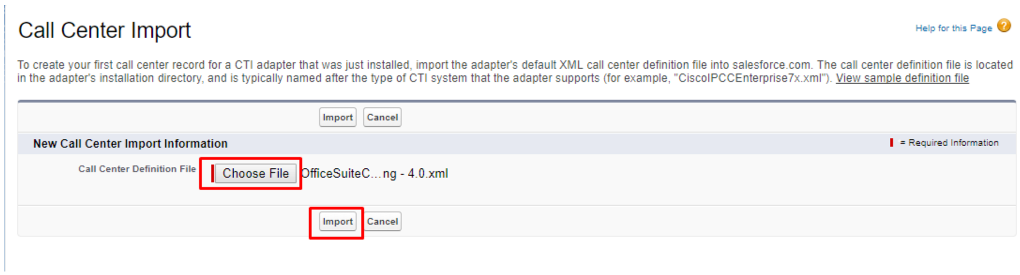
   Automatic Screen Pops – By default the screen pops are turned on

   Allow User Control of Screen Pop – This allows for an individual user to have control whether or not they want to have automatic screen pops

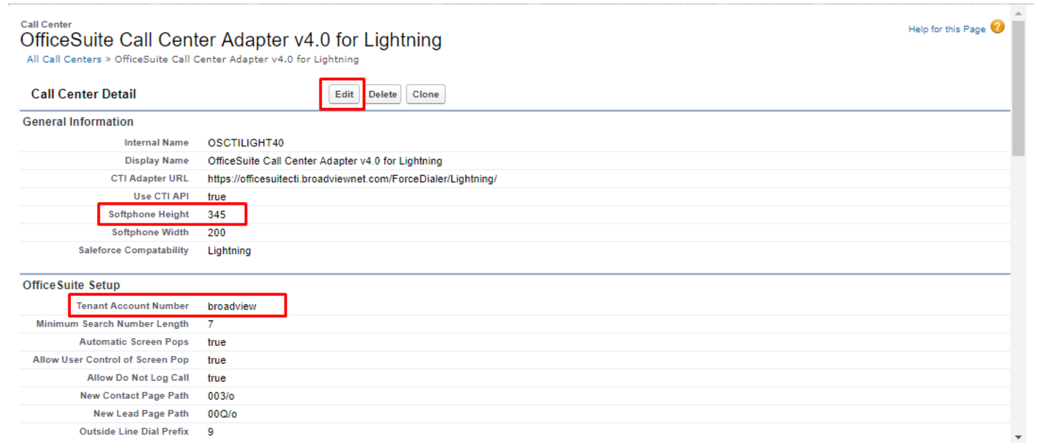
   Allow Do Not Log Call – By default, each user will have the option to either Log Calls or Do Not Log Calls upon call completion

   New Contact Page Path – This will allow for a user to enter in a new contact if not already in Salesforce

   New Lead Page Path – This will allow for a user to enter in a new contact if not already in Salesforce



For both the New Contact and New Leads Page Paths, a user will be presented with the option to create either a new contact or lead if no matches are found. If you remove the URL for one or both of the links, then the options won't be presented. This is how you can disable that feature. The URL can also be changed to any URL within your Salesforce instance. For example if the page you wanted to show was "https://mysalesforce.com/somefolder/thisisthemagicpage", then the path to enter in the Admin screen would be "somefolder/thisisthemagicpage".



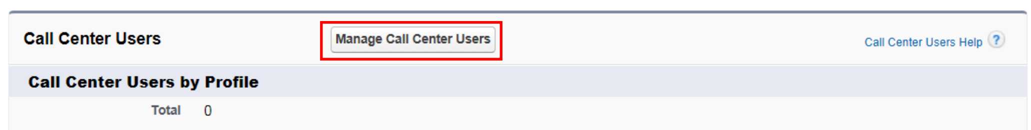
10. Under the **Call Results Setup** section you will notice prepopulated results. You also have the ability to customize as necessary.

11. Under the Custom Field Overrides section, you can change where call notes are stored by entering the field name of the field where you want to store your call notes. The field's data type should be Text Area (255).

12. Click **Save**.

13. Navigate to the **All Call Centers** page again and then click the newly imported adapter.

14. Scroll down and click **Manage Call Center Users**.



15. Click **Add More Users**.

16. To find the user you are logged in as, enter your search criteria and click **Find**. The system returns a line with your user information.

    Note: If your user information does not appear, use the following workaround:

    a. In the Navigation pane, click **My Personal Information** > **Personal Information**.

b. Scroll down and click **Edit**.

c. Beside the Call Center field, click **Call Center** Lookup.

d. The system returns the Lookup window.

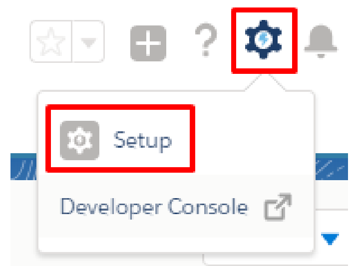
e. Enter the adaptor name and click **Go**! The system returns the Search Results.

f. Click the Name of the adaptor. The adaptor is added to your Personal Information.

g. Click **Save**.

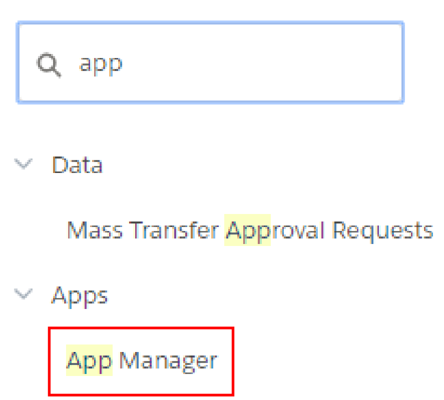
16. Check the box for your account, then click **Add to Call Center**.

17. Click your name in the upper right-hand corner of the homepage and from the drop-down list, choose **Setup**.

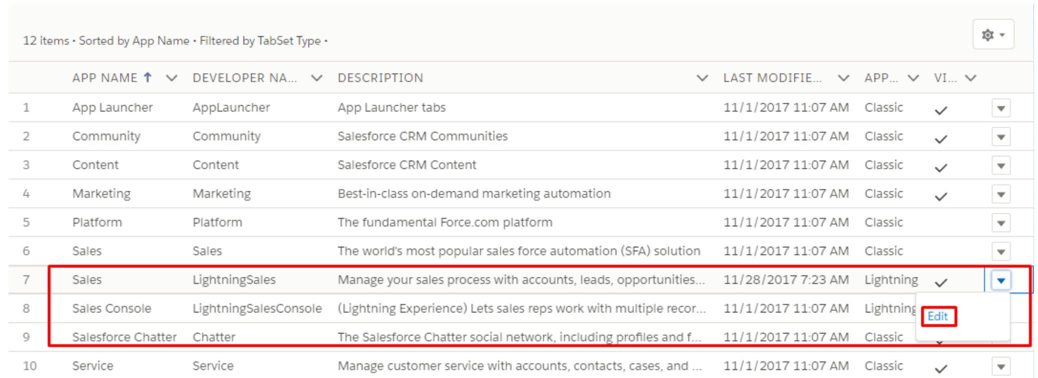


18. If you are using Salesforce Classic, setup is complete. If you are using Salesforce Lightning, please follow steps 19 to 22.

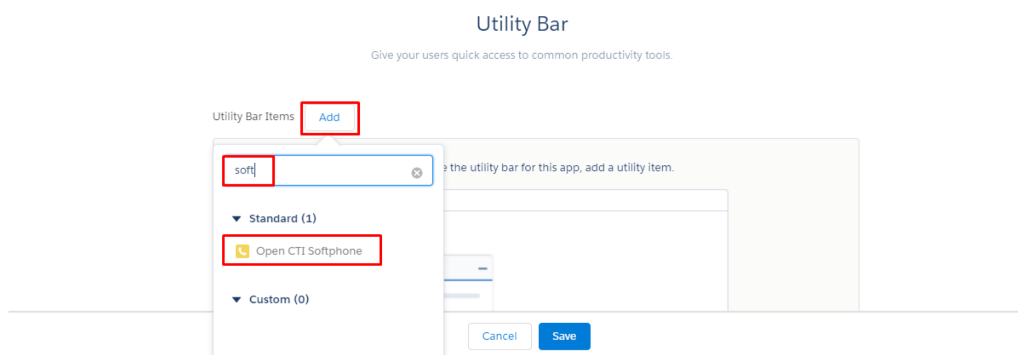
19. In the Navigation pane on the left-hand side of the page, type in app. Select **App Manager**.



20. From the list, select Main Lightning app that you use. Click **Edit**.



21. Locate the Utility bar section. Click **Add**. Type in soft and select the **Open CTI softphone**.



22. Click **Save**.

Licensing

OfficeSuite UC Connector for Salesforce is sold on a per user basis. When purchasing, you will select how many users you would like to have this feature. During the step where you Manage Call Center Users, you will have the ability to select however many users you want but, only the number of users you purchased licenses for will be able to login. Once a user is added to the Call Center, then they will have this feature enabled when they login to Salesforce.

Once you select this feature for a user and they log into it, they will be allocated one of your purchased licenses. On the first day of every month, we will reset the allocated licenses back to 0 and will start re-allocating them as users log in. If you have changes you want to make for the users that have the feature enabled in Salesforce, it is best to make those changes before the end of the month.

What happens if I have an employee that leaves in the middle of the month?

This license won't be reusable until the first of the next month.

What if I need additional licenses?

Contact your Sales Representative to purchase additional licenses.

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