



# OfficeSuite UC<sup>®</sup> Connector for Salesforce

# Table of contents

- 3** Introduction
- 4** Operating system, hardware and software requirements
- 5** Using OfficeSuite UC Connector for Salesforce

# Introduction

OfficeSuite UC<sup>®</sup> Connector for Salesforce is a feature that integrates your phone communications directly into your Salesforce environment, to accelerate, simplify, and streamline your workflow.

OfficeSuite UC Connector for Salesforce seamlessly integrates telephony users' telephone operations with Salesforce.com, providing multiple features including click-to-dial from Salesforce and Salesforce contact record pop-up based on incoming calls.

## Features

- Screen pop-ups of incoming and outgoing calls based on received and placed calls that are matched to the corresponding record in CRM.
- Click-to-dial from within the Salesforce.com user interface
- Click-to-answer from within the Salesforce.com interface
- Make outgoing calls from within the Salesforce.com user interface
- Selective match: If caller ID matches multiple records within Salesforce.com, the user can select the appropriate record when the caller has been identified verbally
- Note taking: ability to take notes while on calls
- Call logging: ability to log calls with the associated contact
- Create a new lead or contact for an unknown caller
- Manage multiple calls at the same time

# Operating system, hardware and software requirements

## Browsers

- IE8+
- Google Chrome
- Mozilla Firefox
- Safari

## Hardware

- Windows
- Mac OS
- Android
- iOS
- Linux

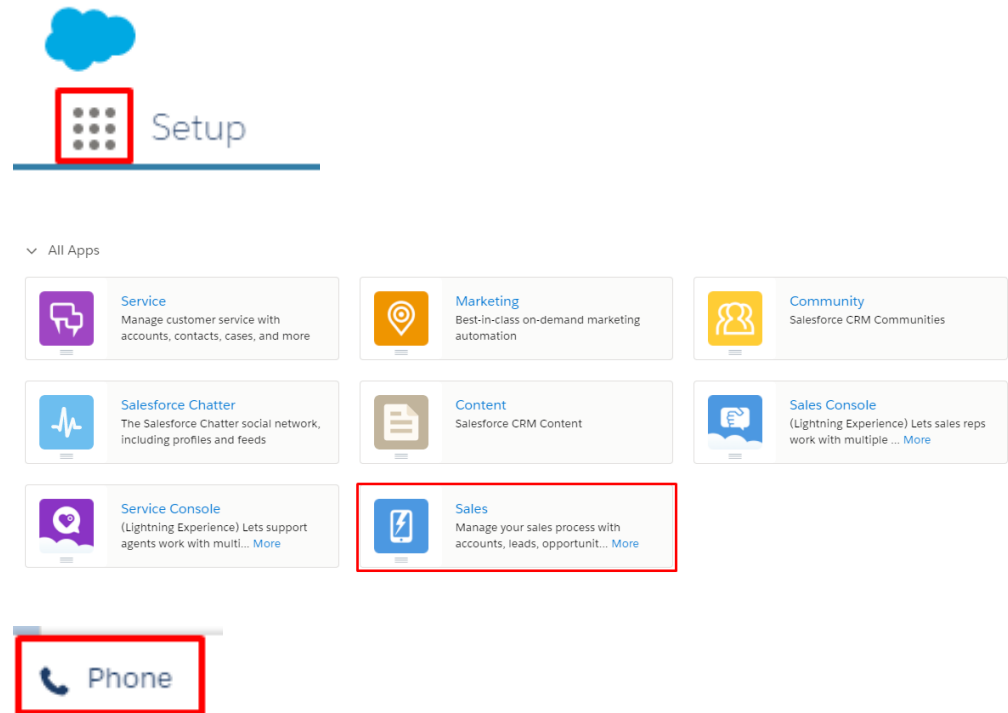
## Salesforce versions

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

# Using OfficeSuite UC Connector for Salesforce from within the Salesforce.com interface

## Connecting Salesforce with OfficeSuite UC

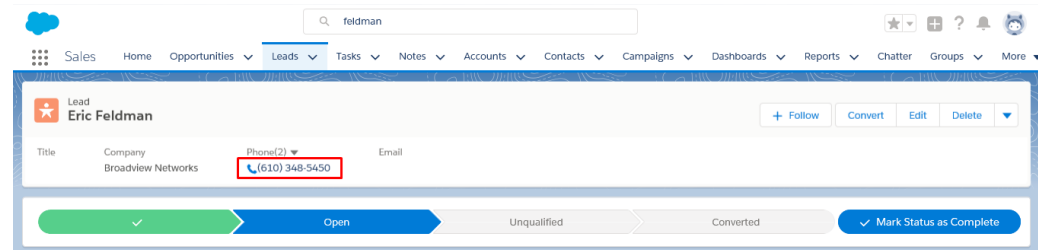
1. Login to Salesforce.com using one of the supported browsers.
2. First time users will need to click on the **App Manager** (the nine dot icon) located on the top left-hand corner.
3. Find out from your Salesforce Admin which app they assigned the OfficeSuite UC Connector for Salesforce to and select that from the App list.
4. You will notice a Phone icon in the lower utility bar. Click on the **phone icon** to launch the OfficeSuite UC Connector for Salesforce.
5. Login with your OfficeSuite UC Extension and PIN and click **Connect Me**. This will connect you to whatever phone you are currently logged into (desk phone, PC softphone or mobile app).



## Placing an Outbound call from Salesforce

There are three options for placing a call within Salesforce:

1. Dialing the phone number using the telephony dial pad. To do this, simply open the OfficeSuite UC Connector by clicking on **Phone** in the bottom right corner, dial the telephone number and hit **Call**.
2. Click-to-dial by clicking on any phone number within Salesforce.
3. Dial directly from your logged in Officesuite UC phone.



## Receiving an Inbound call in Salesforce

On an incoming call, OfficeSuite UC Connector for Salesforce will match the caller ID with the appropriate contact in Salesforce and pop the contact record.

Depending on how your Salesforce Administrator sets up your service, you may also have the ability to turn on/off the automatic screen pops. By default the screen pops are turned on. If you desire to turn off you can do the following:

1. Click on the **Gear icon**.
2. You will then have the ability to turn off by unchecking the box.
3. Click **Save**.

Incoming call screen pops are based on Salesforce database search for matching records (contacts, accounts and leads). If only one match is found, the matching record will pop on the screen.

If multiple matches are found, the matches are listed with hyperlinks to the associated Salesforce record. Pick on the correct contact and that contact's record will display on the screen.

If no matches are found, you will have the ability to click on the **Create New Lead** or **Create New Contact** hyperlinks to open up a blank page to enter in details.

## Taking notes while on a call

Once you have a contact selected, you can enter notes at any time during the call.

At the end of the call, you may append more notes and save all notes by selecting **Log Call**. You also have ability to select a result from the **Call Result** drop-down. If you so choose, you have the ability to not log the call as well (depending how your Salesforce Administrator sets this up). If you never selected a contact, no matches were found, and you didn't create a new contact or lead, this screen will not appear.

## Managing multiple calls

If you are on a call or typing notes upon ending a call, and receive another call, you will notice the **Other Calls** icon.



Click on the **Other Calls** icon and you will see a hyperlink to pop the screen for the calling party. The Other Calls icon allows you to toggle back and forth between calls and not lose any notes you may have typed during the call.

## Viewing notes

If you log the call, then the notes will show as an activity log entry against the associated Salesforce record.

### Activity Timeline

#### Next Steps

- >   Call  
You have an upcoming Task
- >   Call  
You have an upcoming Task

### Call

End User

Subject

Call

Due Date

12/3/2017

Call Duration

0

Call Result

Good Call

Topic

Comments

Spoke about CRM Connector.

### About Windstream Enterprise

Windstream Enterprise collaborates with businesses across the U.S. to drive digital transformation by delivering solutions that solve today's most complex networking and communication challenges.

For more product help, visit [windstreamenterprise.com](http://windstreamenterprise.com)

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