



CRM LINK for SALESFORCE

Full Admin/User Guide



FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

TABLE of CONTENTS

Overview Fidelity CRM Link	2
1. Prerequisites for CRM Link for Salesforce Installation:	2
List of Salesforce User ID's (Your Salesforce Administrator should be able to export a list.)	2
List of HUD Web User Names	2
Administrator Control Panel (CP) User Name and Password	2
Access to Salesforce	2
2. Setup	2
a. Installing Fidelity CRM Link for Salesforce for the First Time	2
b. Granting Access to All Users	6
c. Setting Up HUD User Logins	7
d. Adding Remote Sites	8
e. Getting Server Token:	9
f. Retrieving Your User ID	9
3. Adding Users to Call Center	13
4. Adding Fidelity SoftPhone Layouts	17
5. Changing the Call Center URL	19
USER GUIDE	21
Using the Fidelity phone:	21
Making a Call Using the Fidelity Phone	21
Answering a Call Using the Fidelity Phone	23
Viewing stored comments	25



FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

Overview

Fonality CRM Link was created to provide enhancements to your Salesforce experience by linking your Fonality Solutions to your Salesforce CRM system. **Fonality CRM Link** integrates business communications into the Salesforce environment to improve agent productivity, increase call efficiency and redefine the customer experience.

Fonality CRM Link will enhance your Salesforce interface with features such as:

- Integrating a Dial Pad SoftPhone with your dashboard
- 1 Click Dial outbound calling using your Fonality Business Solution
- Automatic Call Logging (storing customer notes, contacts, caller ID, records, etc.) in real time
- Integrating custom pop-up Fonality and Salesforce objects through Caller ID

This Administrator's Guide will enable a Salesforce Administrator to deploy **Fonality CRM Link for Salesforce** to your instance of Salesforce CRM.

1. Prerequisites for CRM Link for Salesforce Installation:

List of Salesforce User ID's (Your Salesforce Administrator should be able to export a list.)

List of HUD Web User Names (Combine 1 and 2 for the .csv file to be uploaded to Salesforce.)

Administrator Control Panel (CP) User Name and Password (This will also provide you with your Server ID.) *see bottom of document for HUD Web note

Access to Salesforce.

2. Setup

a. Installing Fonality CRM Link for Salesforce for the First Time:

- LOGIN into Salesforce as System Administrator at <https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B5c95EAB>

FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

- CLICK => Continue

Package Installation Details

Help for this Page

Package Name	SFAdapter
Version Name	1.0
Version Number	1.0 (Beta 4)
Publisher	Fonality
Description	

Continue Cancel

Package Components

- CLICK => Get It Now

NO LOGO

Fonality CRMLink for Salesforce
 Simple integration between Salesforce and your Fonality unified communicati
 ★★★★★ (No Rating)

Email

Like 0

Tweet 0

Overview Details Reviews Provider

Save

Get It Now

App by Fonality

The Fonality CRMLink app for Salesforce allows Fonality customers to click to dial within any Salesforce object, and also offers configurable screen pops for incoming calls.

RELEASED

PRICING
Free

- CLICK => Log in to the AppExchange

NO LOGO

Fonality CRMLink for Salesforce
 Simple integration between Salesforce and your Fonality unified communicati
 ★★★★★ (No Rating)

Email

Like 0

Tweet 0

Overview Details Reviews Provider

Save

Get It Now

To get this app, select one of the below options


Log in to the AppExchange
Use your Salesforce credentials

I don't have a login
Continue as a guest

Even if you plan to install into your sandbox, first login to the AppExchange using your production credentials.

- CLICK => Install in production

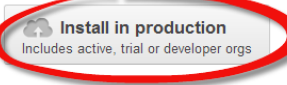
FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

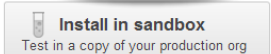
 **Fonality CRMLink for Salesforce**
Simple integration between Salesforce and your Fonality unified communicati
★★★★★ (No Rating)

[Email](#) [Like](#) 0 [Tweet](#) 0

Overview Details Reviews Provider [Save](#) [Get It Now](#)


How would you like to continue?

 **Install in production**
Includes active, trial or developer orgs

 **Install in sandbox**
Test in a copy of your production org

- **CLICK => Confirm and Install!**

Almost there!

 Salesforce.com Inc. is not the provider of this application and has not conducted any review of it. Please [click here](#) to understand what this means with respect to security and trust.

WHAT YOU ARE INSTALLING	WHERE YOU ARE INSTALLING
PACKAGE Fonality CRMLink for Salesforce	ORGANIZATION Evans
VERSION SFAdapter (1.3 / 1.0.0)	EDITION Professional Edition
SUBSCRIPTION Free	USER NAME karelia1@aol.com
DURATION Does Not Expire	
NUMBER OF SUBSCRIBERS Site-wide	

I have read and agree to the [terms and conditions](#) .

[Cancel Install](#) | [Back to previous step](#) [Confirm and Install!](#)

- **CLICK => Continue**



FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

Package Installation Details

[Help for this Page](#) 



Package Name	SFAdapter
Version Name	1.3
Version Number	1.0
Publisher	Fonality
Description	

[Continue](#) [Cancel](#)

Package Components

FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

b. Granting Access to All Users:

- From the **SFAdapter** screen, CLICK => **Next**

Package Installer
SFAdapter Help for this Page ?

Step 1. Approve Package API Access Step 1 of 2

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects
This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Quotes	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Solutions	✓	✓	✓	✓
Documents	✓	✓	✓	✓					

General User Permissions
This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions
This Package will be able to use all of the Administrative Privileges from the user's Profile.

Chat Next Cancel

- CLICK => **Install**

Package Installer
SFAdapter Help for this Page ?

Step 2. Install Package Step 2 of 2

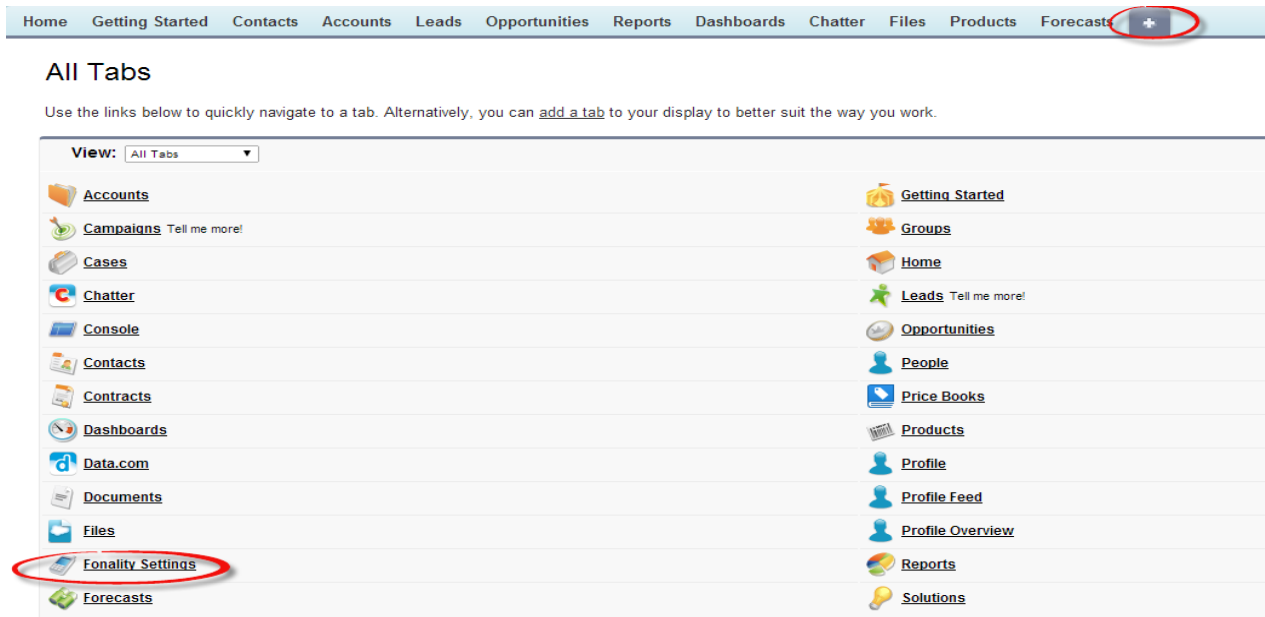
The package is ready to be installed. Click Install to continue.

Previous Install Cancel

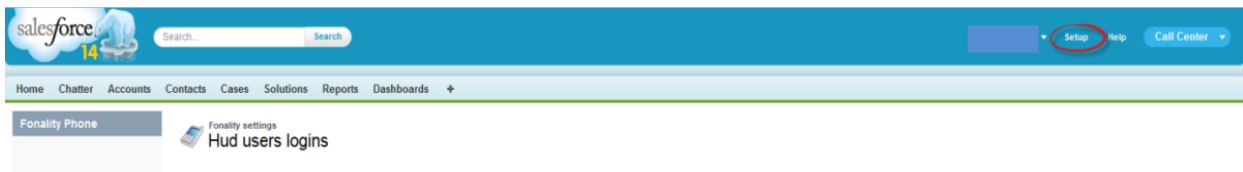
FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

c. Setting Up HUD User Logins:

- CLICK => + Sign from the Tool Bar Menu
- CLICK => **Fonality Settings** (This will take you to the **HUD users logins** screen.)



- CLICK => **Setup** in the upper right hand corner



FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

d. Adding Remote Sites:

Under **Administer**:

- CLICK => **Security Controls** => **Remote Site Settings**.
- CLICK => **New Remote Site**

Quick Find

Expand All | Collapse All

Force.com Home

Administer

- Manage Users
- Manage Apps
- Company Profile
- Security Controls**
- Sharing Settings
- Password Policies
- Session Settings
- Network Access
- Activations *New!*
- Login Access Policies
- Certificate and Key Management
- Single Sign-On Settings
- Auth. Providers
- View Setup Audit Trail
- Expire All Passwords
- Remote Site Settings**
- HTML Documents and Attachments Settings

All Remote Sites

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

View: All Remote Sites [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
No records to display.							

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

- Enter **Remote Site Name** and **Remote Site URL**
- CLICK => **Save**

Quick Find

Expand All | Collapse All

Force.com Home

Administer

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Administration
- Google Apps

Remote Site Edit

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.

Remote Site Edit

Remote Site Name

Remote Site URL

Disable Protocol Security ⓘ

Description

Active

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e. Getting Server Token:

- CLICK => **Fonality Settings**

Enter <https://huc-v5.fonality.com:8080> in the Server URL field.

(**NOTE:** You must have an Admin Username and Admin Password.)

- CLICK => **Get server token**

Fonality Settings
Fonality Salesforce Adapter Settings

Get Server Token

* Don't forget to regenerate your server token after changing admin credentials.

Server URL:

Admin Username:

Admin Password:

Admin Login	Server Token	Server URL
admin10912	289B62F48CACAA6F1591FC63C9301A4619E5421A	https://huc-v5.fonality.com:8080

f. Retrieving Your User ID:

- CLICK => **Setup/Manage Users/Users => User ID**

Setup

All Users

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
<input type="checkbox"/> Edit	Pilichos, Manny	MPili	mpilichos+sf@fonality.com	2/3/2014 10:20 AM		✓	System Administrator	

FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

CLICK => **Edit Layout**

User Profile | Help for this Page

Permission Set Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Managers in the Role Hierarchy [0] | OAuth Connected Apps [1] | Third-Party Account Links [0] | Login History [10+]

User Detail Edit Sharing Change Password

Name	Manny Pi	Role	
Alias	MPili	User License	Salesforce
Email	mp_@os.com	Profile	System Administrator
Username	mpili@nality.com	Active	<input checked="" type="checkbox"/>
Nickname	mpilichos+sf1.390840-@3E12	Marketing User	<input checked="" type="checkbox"/>
Title		Offline User	<input checked="" type="checkbox"/>
Company	Fonality	Knowledge User	<input type="checkbox"/>
Department		Force.com Flow User	<input type="checkbox"/>

DRAG and DROP => **User ID** box located under **Quick Find** down to the **Additional Information** field. **CLICK** => **Save**

User Layout Mini Page Layout Mini Console View Video Tutorial Help for this Page

Save Quick Save Preview Cancel Undo Redo Layout Properties

Quick Find Field Name

- Fields
- Buttons
- Actions
- Expanded Lookups
- Report Charts

Section

Blank Space

User ID

Additional information (Header visible on edit only)

User ID Sample UserID

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Copy your **User ID**:

Monitor

- System Overview
- Imports
- Deployments
- Outbound Messages
- Time-Based Workflow
- Automated Process Actions
- Case Escalations
- API Usage Notifications
- Mass Emails
- Jobs
- Logs

Call Center	FonSFAdapter
Phone	
Extension	
Fax	
Mobile	[Add]
Email Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)
Employee Number	
Start of day	6:00 AM
End of day	11:00 PM
Used Data Space	278 KB [View]
Used File Space	0 B [View]
Last Login	2/3/2014 10:20 AM
Last Password Change or Reset	1/27/2014 8:35 AM

User ID 005i000002cGdQAAU

- CLICK => **Fonality Settings** Under **Upload configuration file**:
- CLICK => **Click here to download the template**

Upload configuration file

To configure fonality salesforce adapter click upload CSV file. Every line contains HUD account for SF users *sf_user_id,HUD_user_account. Click here to download the template.

Adapter configuration file No file selected.

User name	User HUD Login
Mann	10912_700

- CLICK => **Save File**
- CLICK => **OK**

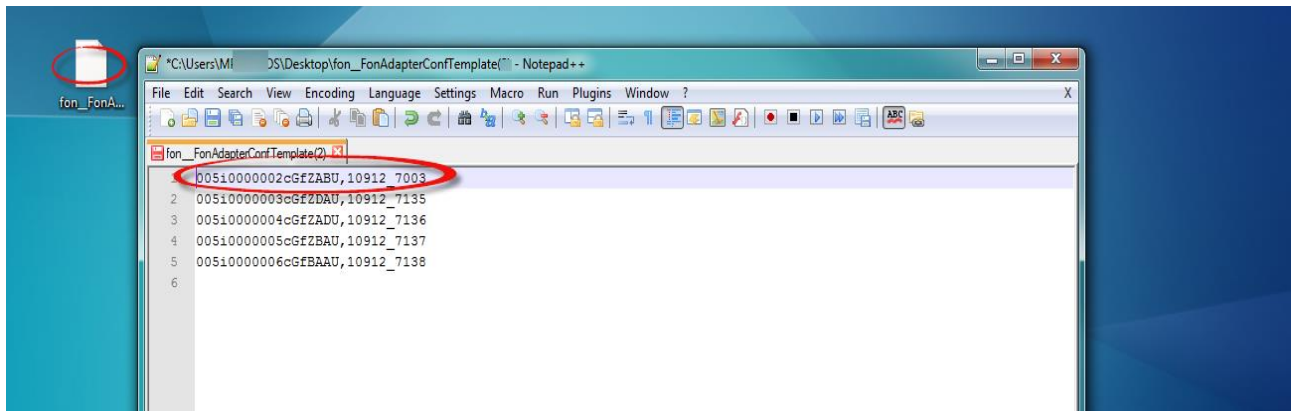
FIND and OPEN => **fon_FonAdapterConTemplate**

- ENTER your **Salesforce USER ID** and **HUD USER ID** in the template with the format **SalesforceID,HUD USER ID (No Spaces)**.

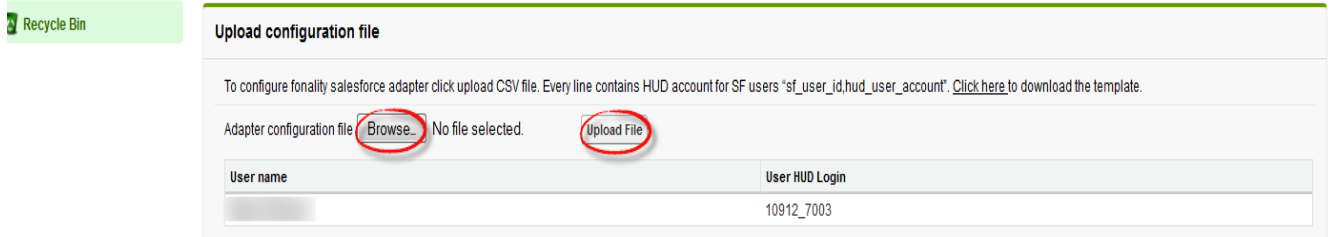
NOTE:

FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

- If you use an email address for your Salesforce User ID, you can change your HUD USER ID to the same email address through the HUDWeb Control Panel (CP).
- If you are going to add multiple users, make sure the format below is applied. Each user will have a unique ID and will have to be entered on a separate line.



- CLICK => **Save**
- CLICK => **Fonality Settings => Browse**
- SELECT => **fon_FonAdapterConTemplate**
- CLICK => **Upload File**



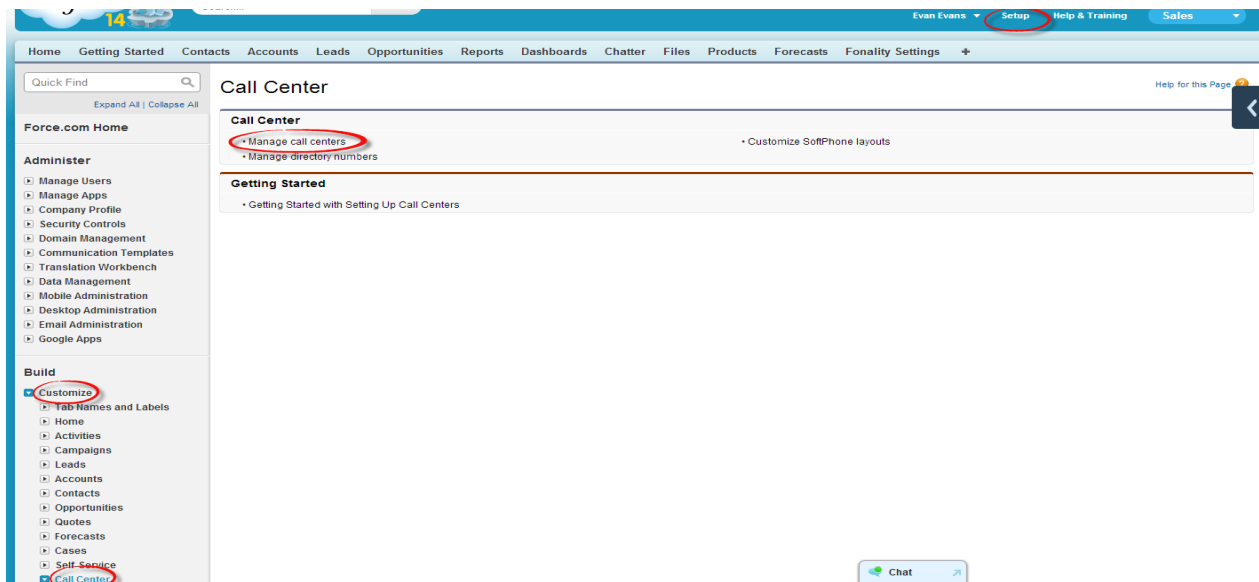
FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

3. Adding Users to Call Center:

CLICK => **Setup**

Under **Build**:

- CLICK => **Customize** => **Call Center** => **Manage call centers**
- CLICK => **Continue**



- CLICK => **Continue** upon reaching **Introducing Salesforce CRM Call Center**

FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

Introducing Salesforce CRM Call Center

Salesforce CRM Call Center improves the productivity of your call center users by providing fast and easy access to accounts, contacts, cases, and other salesforce.com objects that are directly related to incoming calls. By embedding a SoftPhone within salesforce.com, Call Center allows your call center users to perform all the functions of their job from a single application.

Getting Started with Salesforce CRM Call Center

- Install CTI adapters**
 - Update each user's machine so that it has the appropriate Salesforce CTI adapter for the user's call center.
- Define a call center**
 - Specify the call center's name, IP address, port, and any other connection information.
 - Enter dialing options for international, long distance, and external calls.
- Manage users**
 - Select the users who are members of this call center.
- Update the call center directory**
 - Add useful phone numbers beyond the call center user extensions that salesforce.com automatically includes.
- Configure SoftPhone layouts**
 - Select the call details and salesforce.com objects that are automatically displayed with inbound, outbound, and internal calls.
 - Assign a SoftPhone layout to any user profile.

Don't show me this page again

Continue

Ready for Calls

Line 1 On Call

Caller ID 4155551212

Duration 00:22

Found 1 Case

Case Number 00001001

End Call

Hold

Transfer

Conference

Powered by

Salesforce CRM Call Center Resources

- Getting Started with Setting Up Call Centers
- Getting Started with Using a SoftPhone
- Salesforce CRM Call Center Developer's Guide

- CLICK => **FonSFadapter**

All Call Centers

A call center corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce.com users must be assigned to a call center before they can use Call Center features.

Action	Name	Version	Created Date	Last Modified Date
Edit Delete	FonSFAdapter		1/31/2014 1:13 PM	1/31/2014 1:13 PM

- CLICK => **Edit**

Call Center
FonSFAdapter

All Call Centers » FonSFAdapter

Call Center Detail

Edit Delete Clone

General Information

InternalNameAAA	FonSFAdapter
Display Name	FonSFAdapter
CTI Adapter URL	https://huc-dev.fonality.com/repository/SFAdapter/index.html
Use CTI API	true
Softphone Height	200
Softphone Width	500

Dialing Options

Outside Prefix	9
Long Distance Prefix	1
International Prefix	01

- CHANGE => CTI Adapter URL to <https://sfa.fonality.com/SFAdapter/>

FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

- CLICK => Save

Call Center Edit
FonSFAdapter Help for this Page

All Call Centers » FonSFAdapter

Call Center Edit Save Cancel

General Information ! = Required Information

InternalNameAAA

Display Name

CTI Adapter URL

Use CTI API

Softphone Height

Softphone Width

Dialing Options

Outside Prefix

Long Distance Prefix

International Prefix

Save Cancel

- CLICK => Manage Call Center Users

Call Center
FonSFAdapter Help for this Page

All Call Centers » FonSFAdapter

Call Center Detail Edit Delete Clone

General Information

InternalNameAAA FonSFAdapter

Display Name FonSFAdapter

CTI Adapter URL https://sfa.fonality.com/SFAdapter/

Use CTI API true

Softphone Height 200

Softphone Width 500

Dialing Options

Outside Prefix 9

Long Distance Prefix 1

International Prefix 01

Call Center Users Manage Call Center Users Call Center Users Help

Call Center Users by Profile

Total 0

FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

- CLICK => **Add More Users**

Call Center Help for this Page ?

FonSFAdapter: Manage Users

[All Call Centers](#) » [FonSFAdapter](#) » [Manage Users](#)

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

Full Name ↑	Alias	Username	Role	Profile
No records to display.				

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

- Enter Name(s) in the search field
- CLICK => **Find**
- Place a Check mark with the User(s) you would like to add
- CLICK => **Add to Call Center**

Call Center Help for this Page ?

FonSFAdapter: Search for New Users

[All Call Centers](#) » [FonSFAdapter](#) » [Manage Users](#) » [Search for New Users](#)

Set the search criteria below and then click Search to find salesforce.com users who should be enabled as call center agents. Users already enabled as call center agents are excluded from the search results.

--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 3/3/2014
- For date/time fields, enter the value in following format: 3/3/2014 1:15 PM

Find

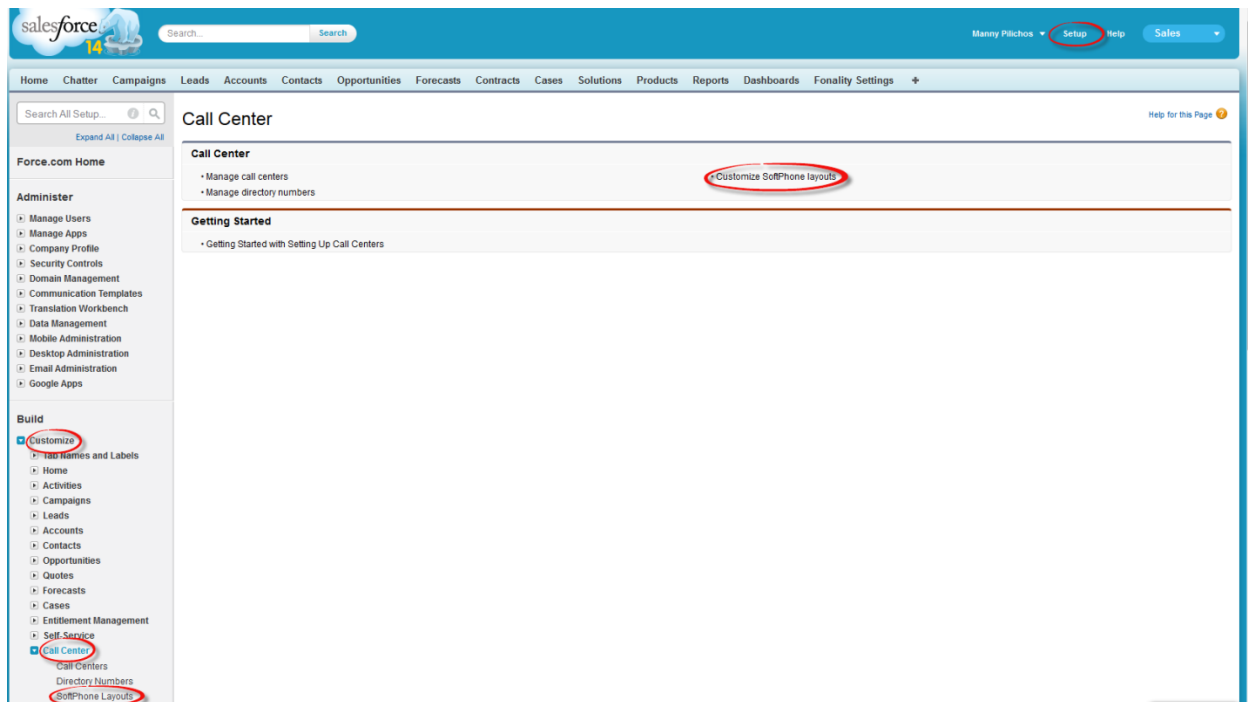
Full Name	Alias	Username	Role	Profile
<input checked="" type="checkbox"/> Smiles, Jonathan	JSmil	rockc_ss@s.net		System Administrator

FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

4. Adding Fonality SoftPhone Layouts

From Setup

- CLICK => **Customize | Call Center**
- CLICK => **SoftPhone Layouts | Customize SoftPhone layouts**



- CLICK => **New**
- Enter the **Name**. Customize your settings under SoftPhone Layout and CTI 2.0 or Higher Settings.
- Check box with => **Is Default Layout**
- CLICK => **Save**

FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

Search All Setup... Expand All | Collapse All

Force.com Home

Administer

- Manage Users
- Manage Apps

SoftPhone Layouts Help for this Page

A SoftPhone is a customizable call control tool that appears in the sidebar of every salesforce.com page if a user is assigned to a call center and is working on a machine on which a CTI adapter has been installed. Similar to page layouts, you can design custom SoftPhone layouts and assign them to call center users based on their user profile.

New SoftPhone Layout Assignment

Name	Default	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
No records to display.					

Search All Setup... Expand All | Collapse All

Force.com Home

Administer

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Administration
- Google Apps

Build

- Customize
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Contacts
 - Opportunities
 - Quotes
 - Forecasts
 - Cases
 - Entitlement Management
 - Self-Service
 - Call Center
 - Call Centers
 - Directory Numbers
- SoftPhone Layouts

SoftPhone Layout Edit Help for this Page

Each SoftPhone layout allows you to customize the appearance of a SoftPhone for inbound, outbound, and internal calls. Assign SoftPhone layouts to user profiles by clicking Layout Assignment in the SoftPhone Layouts page.

Name Save Cancel Default Layout

Select Call Type: **Inbound**

Softphone Layout Help about this section

Display these call-related fields:

- Caller ID, Dialed Number Edit

Display these salesforce.com objects: Add / Remove Objects

- Account, Contact, Lead
- If single Account found, display:** Account Name Edit
If multiple matches found, only Account Name is displayed.
- If single Contact found, display:** Name Edit
If multiple matches found, only Name is displayed.
- If single Lead found, display:** Name Edit
If multiple matches found, only Name is displayed.

CTI 2.0 or Higher Settings Help about this section

Screen Pop Settings:

- Screen pops open within: Existing browser window Edit
- No matching records: Don't pop any screen Edit
- Single-matching record: Pop detail page Edit
- Multiple-matching records: Don't pop any screen Edit

Preview

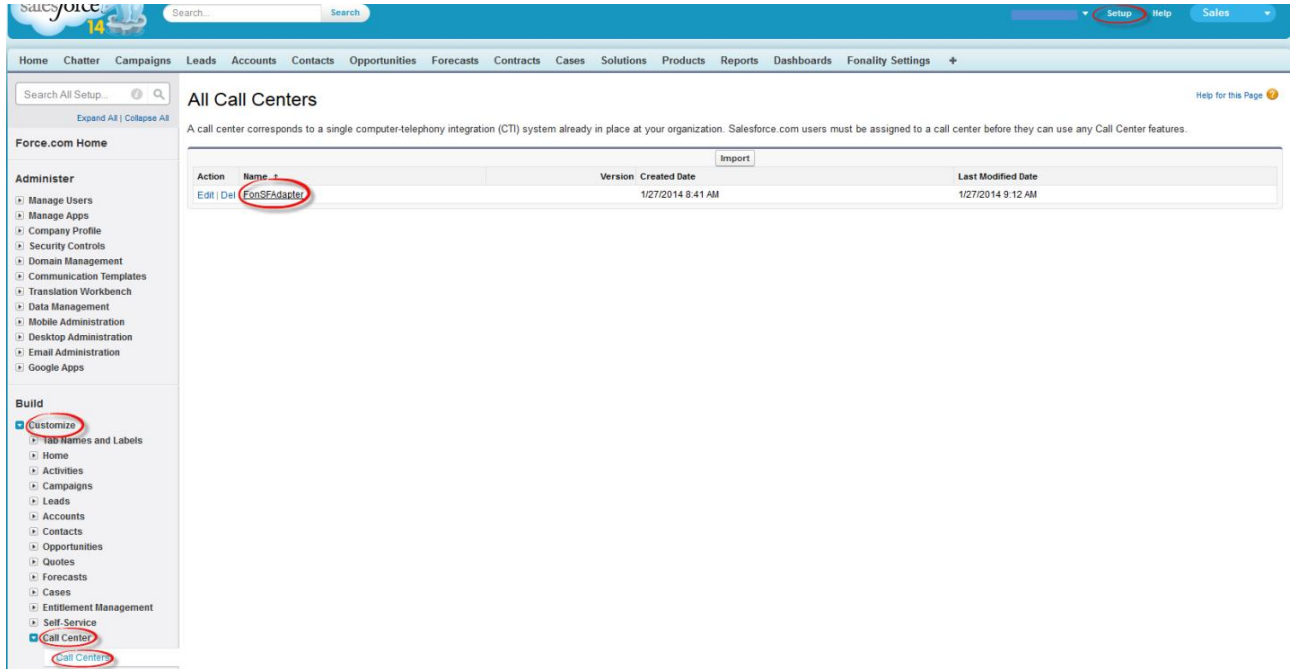
- Line 1** On Call
 - Caller ID: 1-415-555-1212
 - Dialed Number: 1-415-555-1212
 - Account (2) [My Record](#)
 - Contact (2) [Dr. Sarah Samp...](#)
 - Lead (2) [Dr. Sarah Samp...](#)
- Line 2** Incoming Call

FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

5. Changing the Call Center URL

From Setup

- CLICK => **Customize | Call Center**
- CLICK => **Call Centers**
- Choose => **FonSFAdapter**



The screenshot shows the Salesforce Admin interface. At the top, the 'Setup' link is circled in red. The left sidebar shows the 'Build' section with 'Customize' and 'Call Center' circled in red. The main content area displays a table titled 'All Call Centers' with one entry, 'FonSFAdapter', which is also circled in red.

Action	Name	Version	Created Date	Last Modified Date
Edit Del	FonSFAdapter		1/27/2014 8:41 AM	1/27/2014 9:12 AM

FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

- CLICK => Edit

The screenshot shows the Salesforce Admin console interface. The main content area displays the 'Call Center Detail' for 'FonSFAdapter'. The 'Edit' button is circled in red. The page includes sections for 'General Information', 'Dialing Options', and 'Call Center Users'.

General Information	
InternalNameAAA	FonSFAdapter
Display Name	FonSFAdapter
CTI Adapter URL	https://hud.fonality.com/repository/SFAdapterIndex.html
Use CTI API	true
Softphone Height	200
Softphone Width	500

Dialing Options	
Outside Prefix	9
Long Distance Prefix	1
International Prefix	01

Call Center Users	
System Administrator	1
Total	1

- Enter the required URL into **CTI Adapter URL** field. (Uploaded package sets default URL.)
- CLICK => Save

The screenshot shows the 'Call Center Edit' page for 'FonSFAdapter'. The 'CTI Adapter URL' field is circled in red, and the 'Save' button is also circled in red. The page includes sections for 'General Information' and 'Dialing Options'.

General Information	
InternalNameAAA	FonSFAdapter
Display Name	FonSFAdapter
CTI Adapter URL	https://hud.fonality.com
Use CTI API	true
Softphone Height	200
Softphone Width	500

Dialing Options	
Outside Prefix	9
Long Distance Prefix	1
International Prefix	01

FULL ADMIN/USER GUIDE: CRM LINK for SALESFORCE

USER GUIDE

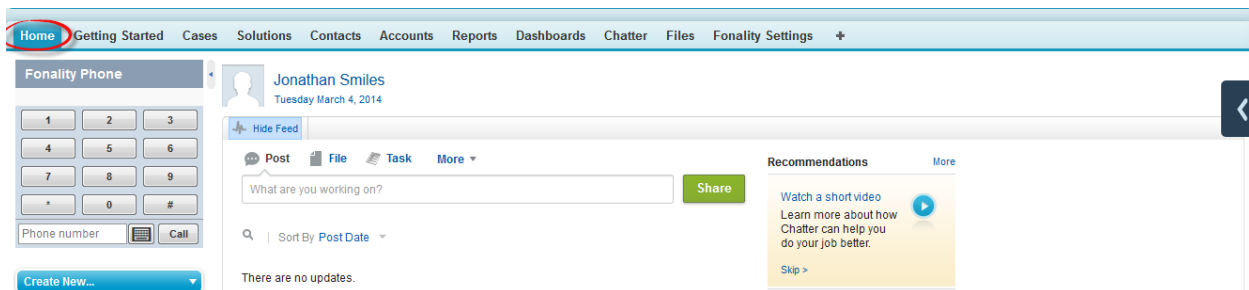
Using the Fonality phone:

User Permissions Needed

To log into Fonality CRM Link Call Center: You must be a member of the FonSFAdapter Call Center. You must also have a Fonality Hud User License. Make sure your computer has an installed microphone and headphones or headset.

Logging In to the Fonality Phone

Fonality CRM Link requires you to log into your Fonality phone system. You are also required to be logged into Salesforce. The Fonality Phone will appear in the upper left hand corner of your dashboard under the **Home** tab.



The Fonality Phone will appear only if you are assigned to the FonSFAdapter Call Center and if the Fonality CRM Link For Salesforce is installed in your organization's instance. If the Fonality Phone does not appear, contact your administrator.

Making a Call Using the Fonality Phone

There are two ways to make a call:

- Dialing a number manually, ie. Typing in the phone number field, clicking on the dial pad and clicking on the **"Call"** button.
- Using 1 Click Dial: Wherever there is a phone number with a 📞 icon, click either the phone number or the 📞 icon once to automatically place the call.

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Dialing a number manually:



Dialing a number using 1 Click Dial:

Mr. Michael MacReady

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[Jonathan Smiles](#) changed Title from Professor to CFO.

[Comment](#) · [Like](#) · February 26, 2014 at 1:03 PM

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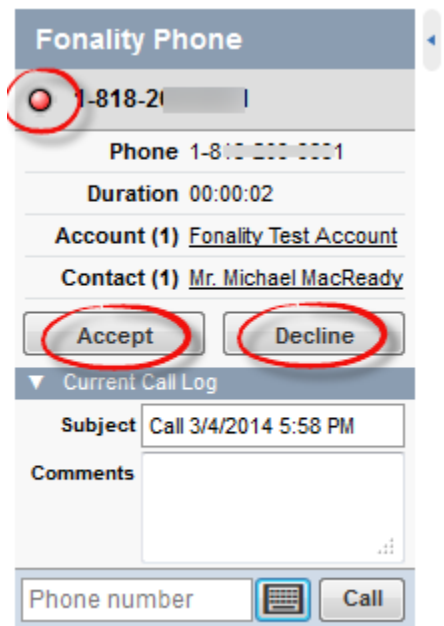
Contact Detail [Edit](#) [Delete](#) [Clone](#) [Request Update](#)

Name	Mr. Michael MacReady	Contact Owner	Jonathan Smiles [Change]
Account Name	Fonality Test Account	Reports To	[View Org Chart]
Title	CFO	Department	
Email	abc@fonalitytest.com	Last Stay-in-Touch	Save Date
Phone	(818) 209-3331		
Mobile		Fax	

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Answering a Call Using the Fonality Phone

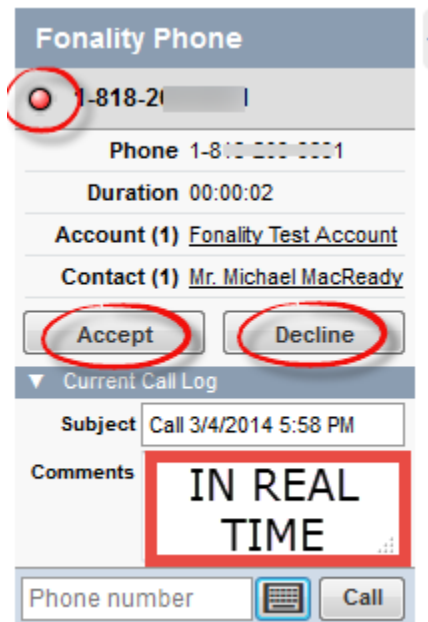
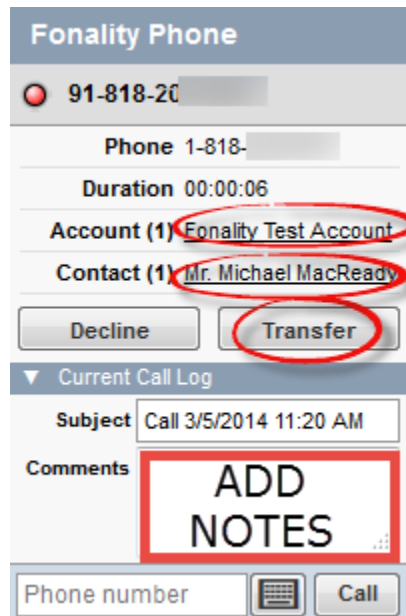
When logged into the Fonality Phone, you can tell that you have an incoming call if you see a flashing red button with a number beneath Fonality Phone. You can **“Accept”** or **“Decline”** the call.



Once you have answered a call, you can:

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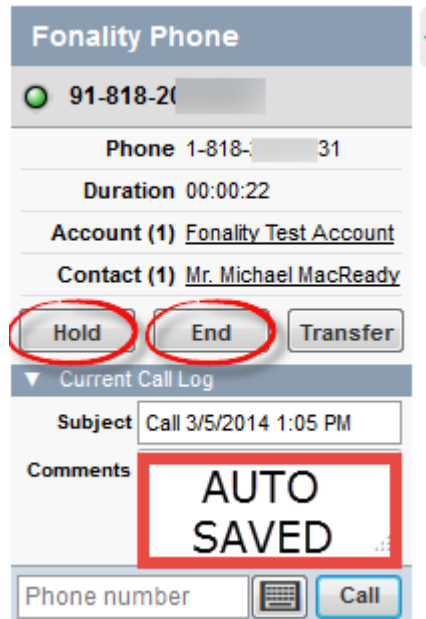
- Log comments and associate Salesforce records with the call
- Put the caller on hold
- Transfer the call to another call center user
- End the call



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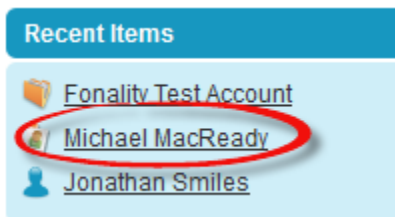
At any time prior to answering or declining the call, you can add notes in the **Comments** field to be stored automatically for the associated Account or Contact in real time.

To hold a call or end a call: Click “Hold” or click “End”. You can also use your physical handset to hang up.



Viewing stored comments

Under **Recent Items** you can click on the associated Account or Contact to view your comments under **Activity History**.



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This will then take you to either your Accounts or Contacts page where you can click on the associated call. Click on the call you would like to view under “**Subject**”.

Activity History						
Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Call 3/5/2014 3:20 PM	Fonality Test Account	✓	3/5/2014	Jonathan Smiles	3/5/2014 3:22 PM
Edit Del	Call 3/5/2014 1:05 PM	Fonality Test Account	✓	3/5/2014	Jonathan Smiles	3/5/2014 1:07 PM
Edit Del	Call 3/5/2014 11:23 AM	Fonality Test Account	✓	3/5/2014	Jonathan Smiles	3/5/2014 11:24 AM
Edit Del	Call 3/5/2014 11:20 AM	Fonality Test Account	✓	3/5/2014	Jonathan Smiles	3/5/2014 11:24 AM
Edit Del	Call 3/5/2014 10:52 AM	Fonality Test Account	✓	3/5/2014	Jonathan Smiles	3/5/2014 10:53 AM

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Your notes will appear under **Task Detail** next to **Comments**.

Task Detail			
▼ Task Information			
Subject	Call 3/5/2014 3:20 PM	Assigned To	Jonathan Smiles
Comments	Testing Notes for PHONE	Status	Completed
Due Date	3/5/2014		
Priority	Normal		

For further information on Fonality CRM Link for Salesforce, please contact us at betafeedback@fonality.com