FONALITY

CRM LINK for SALESFORCE

Full Admin/User Guide

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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

- CLICK => **Continue**

- CLICK => **Get It Now**

- CLICK => **Log in to the AppExchange**

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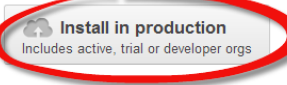
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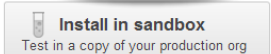
- CLICK => **Confirm and Install!**

- CLICK => **Continue**

Package Installation Details

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

Continue Cancel

Package Components

b. Granting Access to All Users:

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

- CLICK => **Install**

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.)
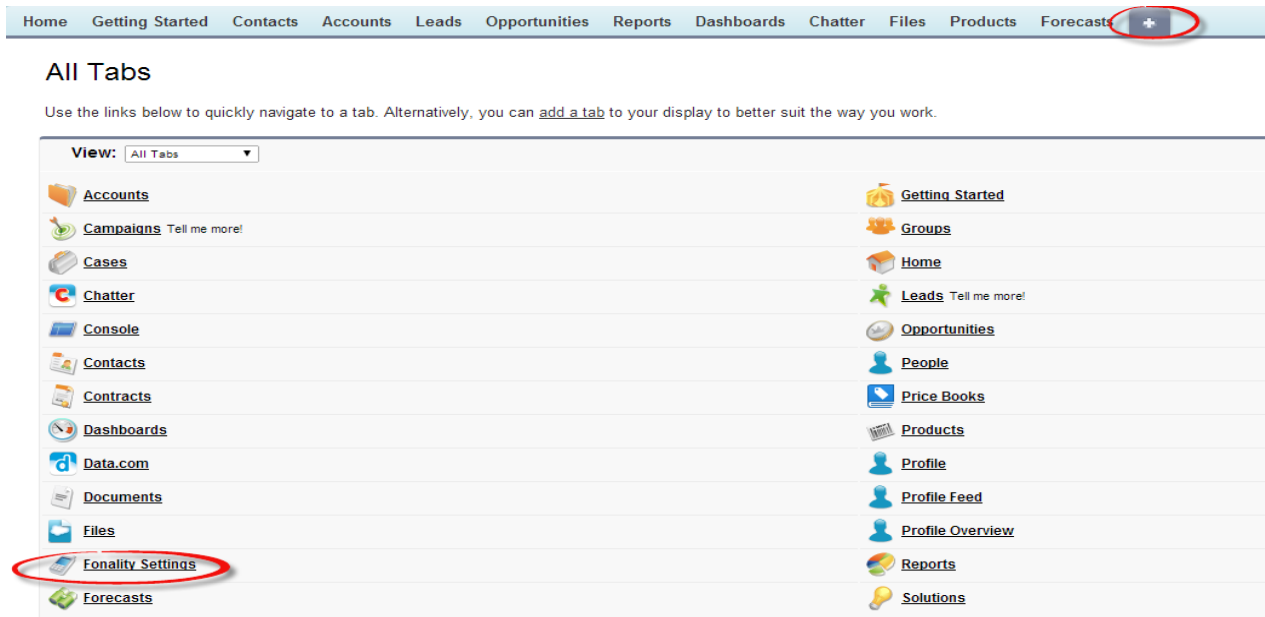
- CLICK => **Setup** in the upper right hand corner
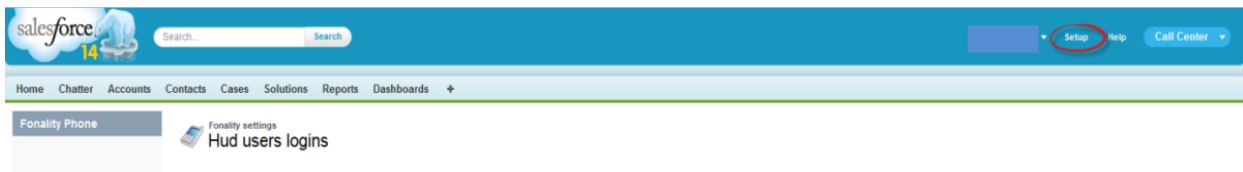
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d. Adding Remote Sites:

Under **Administer**:

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

- CLICK => **New Remote Site**

- Enter **Remote Site Name** and **Remote Site URL**

- CLICK => **Save**

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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**

f. **Retrieving Your User ID**:

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

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CLICK =>**Edit Layout**

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

Copy your **User ID:**

- CLICK => **Fonality Settings**   Under   **Upload configuration file:**

- CLICK => **Click here to download the template**

- 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:

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- 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.
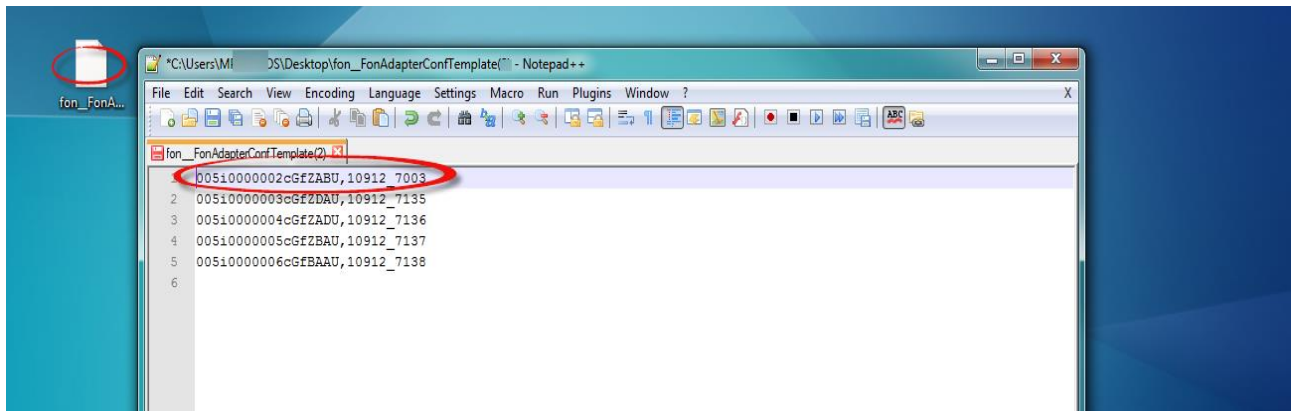
- CLICK =>**Save**

- CLICK => **Fonality Settings** => **Browse**

- SELECT => **fon_FonAdapterConTemplate**
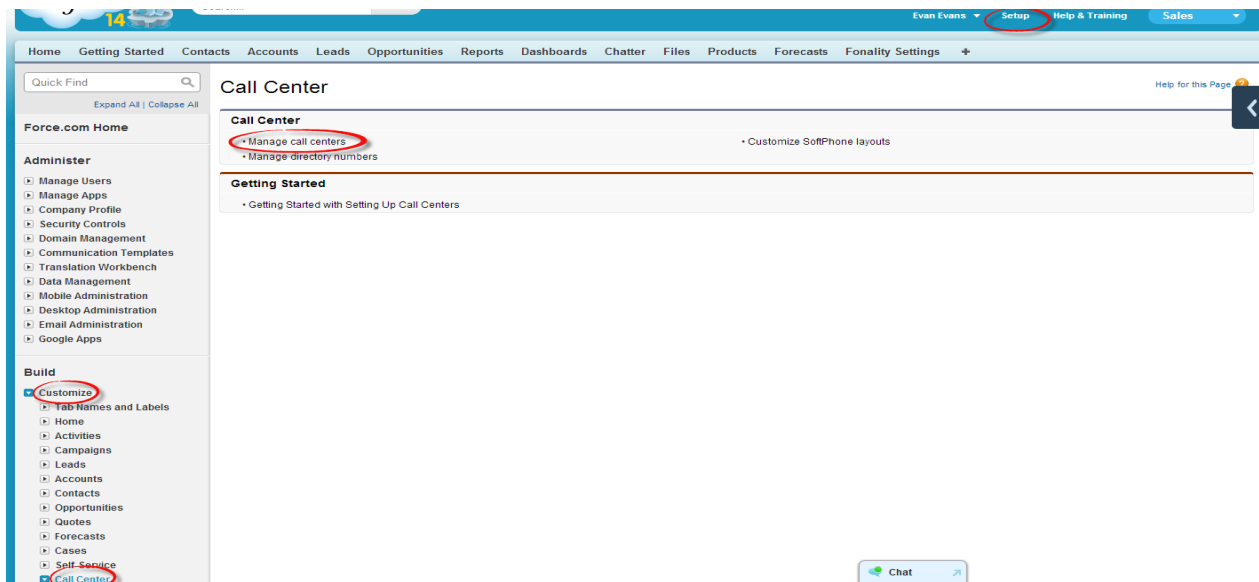
- CLICK => **Upload File**
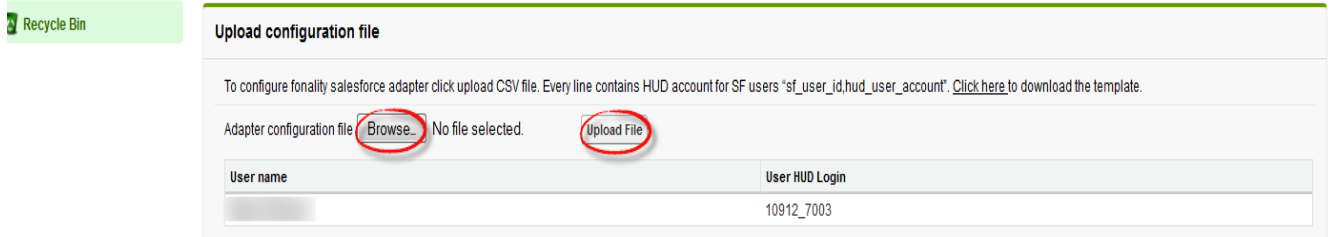
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3. Adding Users to Call Center:

CLICK => **Setup**

Under **Build**:

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

- CLICK => **Continue**

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

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- CLICK => **FonSFadapter**

- CLICK => **Edit**

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

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- CLICK => **Save**

- CLICK => **Manage Call Center Users**

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- CLICK => **Add More Users**

- 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**

4. Adding Fonality SoftPhone Layouts

From **Setup**

- CLICK => **Customize|Call Center**
- CLICK =>**SoftPhone Layouts|Customize SoftPhone layouts**
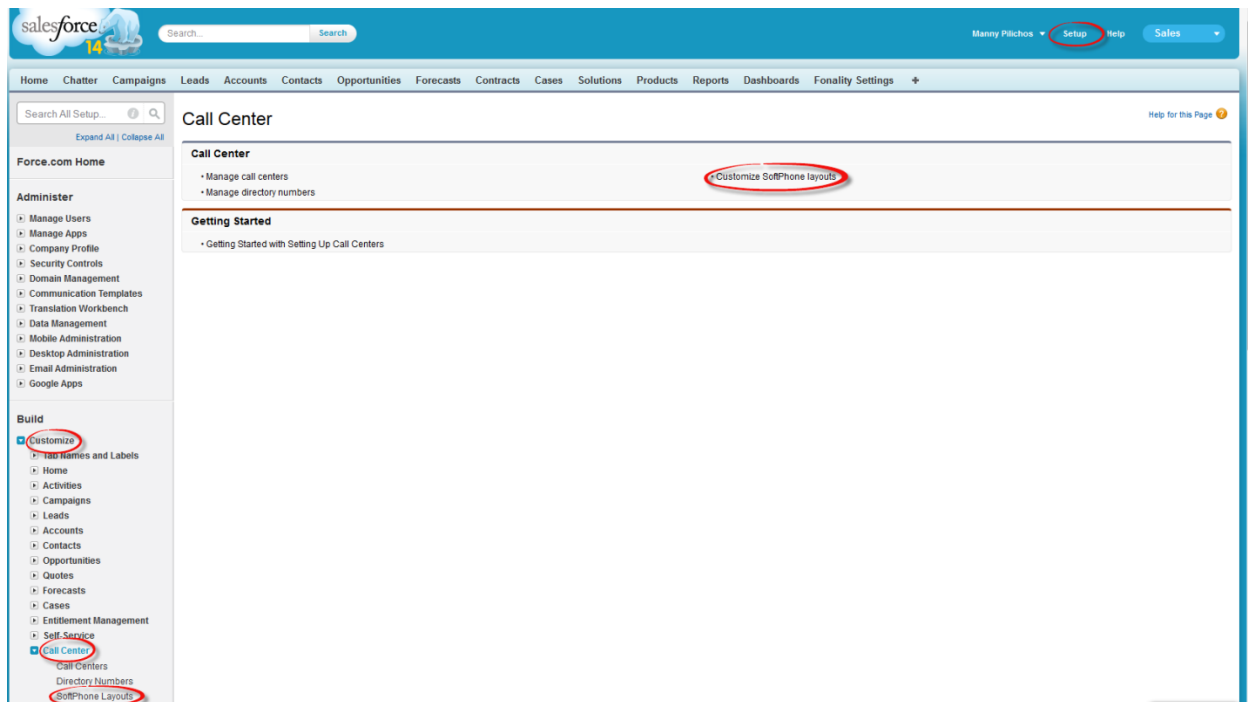
- CLICK => **New**
- Enter the **Name.** Customize your settings under SoftPhone Layout and CTI 2.0 or Higher Settings.
- Check box with =>**Is Default Layout**
- CLICK => **Save**
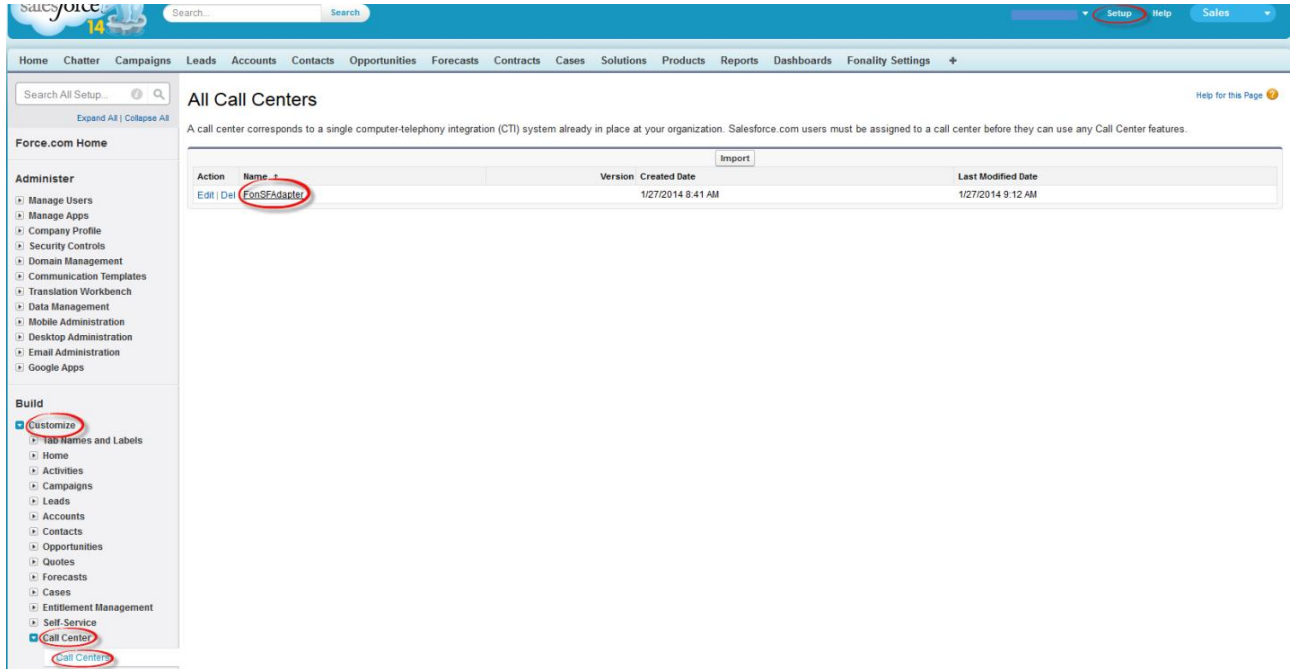
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5. Changing the Call Center URL

From **Setup**

- CLICK => **Customize|Call Center**

- CLICK => **Call Centers**

- Choose => **FonSFAdapter**

- CLICK = > **Edit**

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

- CLICK => **Save**

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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 handset.

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.
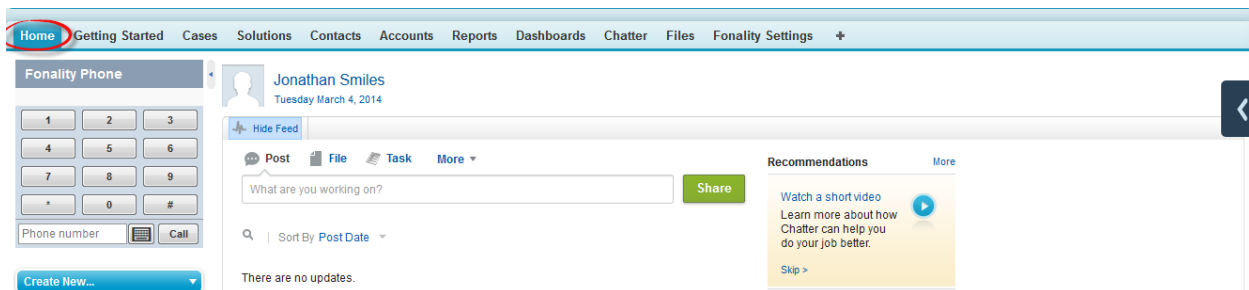

The Fonality Phone will appear only if you are assigned to the FonSFAdapter Call Center and if the Fonality CRM Link For Salesforce is installed in your organization's instance. If the Fonality Phone does not appear, contact your administrator.

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:

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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.
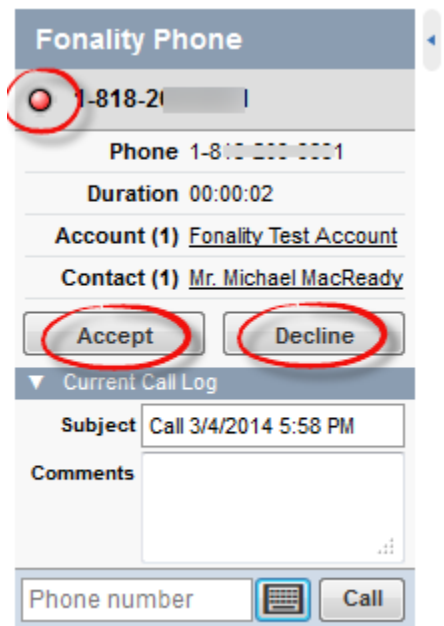
Once you have answered a call, you can:

- Log comments and associate Salesforce records with the call

- Put the caller on hold
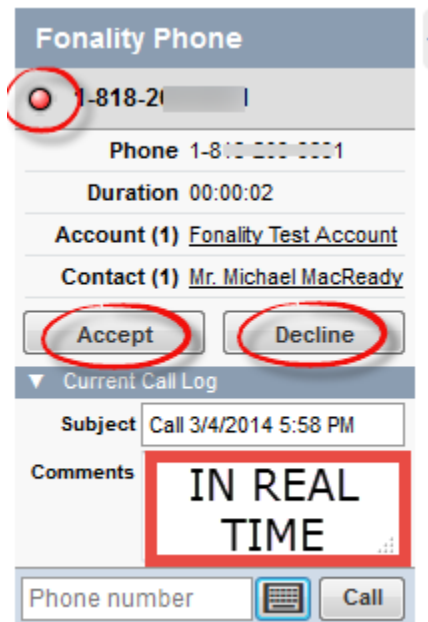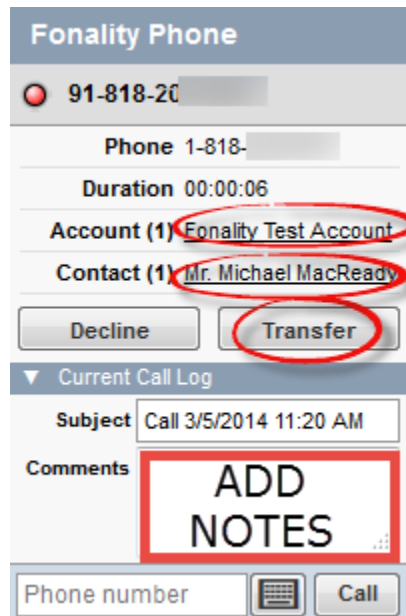
- Transfer the call to another call center user

- 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.
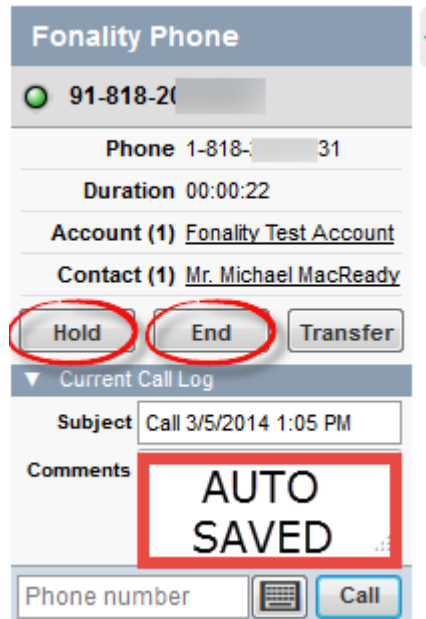
Viewing stored comments

Under **Recent Items** you can click on the associated Account or Contact to view your comments under **Activity History**.
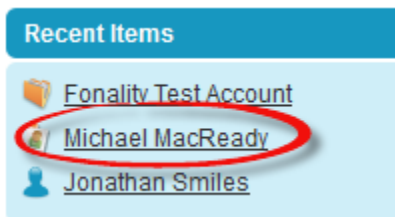
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This will then take you to either your Accounts or Contacts page where you can click on the associated call.   Click on the call you would like to view under "**Subject**".

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

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