

## Guide how to install Salesforce integration for your Onoff Business account.

With OnOff Business and Salesforce integration, you can avoid manual data entry work and log all your team's mobile interactions (calls, SMS, VM) automatically in Salesforce!

The installation process takes only 2-click.

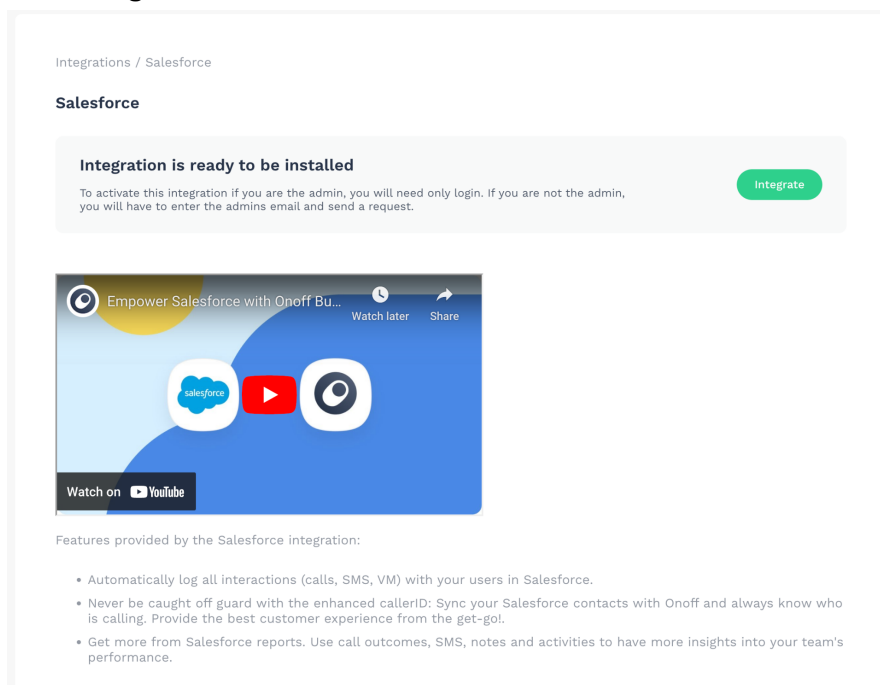
\*You will need admin rights both for the Onoff Business and Salesforce platforms or to provide the email of the Salesforce admin in your organization

To start

- **Log in** to your Onoff Business admin account.
- Select the **Integrations** page from the navigation menu
- Find and select **Salesforce** in the application list

### Step 1: Install integration

- Click **Integrate**



- You will be redirected to Salesforce’s authorization page, where you will be able to log in to the Salesforce admin account.

## Step 2: Connect the Onoff number

- After authorization into your Salesforce account, you will be redirected back to the Onoff admin account, where you will see Onoff user lists already open and ready to connect.
- You can choose All numbers in one click, filter by Label, or just choose several of them and click **Integrate**.

The screenshot shows the 'Integrate numbers' interface. At the top, there's a title 'Integrate numbers'. Below it, there's a 'Select all' checkbox, a 'Search user' input field, and a 'Filter by label' dropdown menu. The main area contains a list of users, each with a checkbox, a profile picture/initials, name, email, phone number, and a 'Sales' button with a '+2' indicator. The users listed are:

| Selection                           | Initials | Name           | Email                      | Phone Number     | Sales   | +2 |
|-------------------------------------|----------|----------------|----------------------------|------------------|---------|----|
| <input type="checkbox"/>            | LE       | Laura Evans    | evanslaura@onoffapp.com    | +33 7 80 ** ** * |         |    |
| <input checked="" type="checkbox"/> | JS       | Justin Smith   | smithjustinn@onoffapp.c... | +33 7 25 ** ** * |         |    |
| <input checked="" type="checkbox"/> | TD       | Trevor Dowd    | trevordowd@onoffapp.com    | +33 7 39 ** ** * |         |    |
| <input type="checkbox"/>            | KT       | Ketevan Ts.    | ketevants@onoffapp.com     | +33 7 95 ** ** * | Sales   | +2 |
| <input type="checkbox"/>            | AR       | Amelie McAdams | ...                        | +1 332 *** ** *  | Mark... | +1 |

At the bottom right, there are 'Cancel' and 'Integrate' buttons.

And that is it! The integration is now up and running. You can come back anytime to the Onoff Business admin account to manage the integration and to add or delete users from the integration.

You can remove the integration from the same page by clicking the “Remove” button and accepting the terms.