



b·hive

SALESFORCE INTEGRATION

PRODUCT TUTORIAL



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Introduction

This integration is intended for b-hive users who use Salesforce as their CRM and would gain efficiencies by having inbound and outbound calls tracked automatically in Salesforce.

Features

Inbound record matching - the calling party number is matched against Salesforce accounts, contacts, leads, and cases allowing a user to quickly access the right area.

Outbound click-to-call - calls can be originated straight from Salesforce records with a single click.

Call dispositioning - identify the outcome of each call using a consistent pick-list

Call notes - add notes to each call activity on the fly

New records - create new leads or cases easily from the embedded app

Activity logging - time, duration, and direction of each call is stored

Record-linking - link to b-hive call recordings or voicemails from Salesforce activity

Requirements

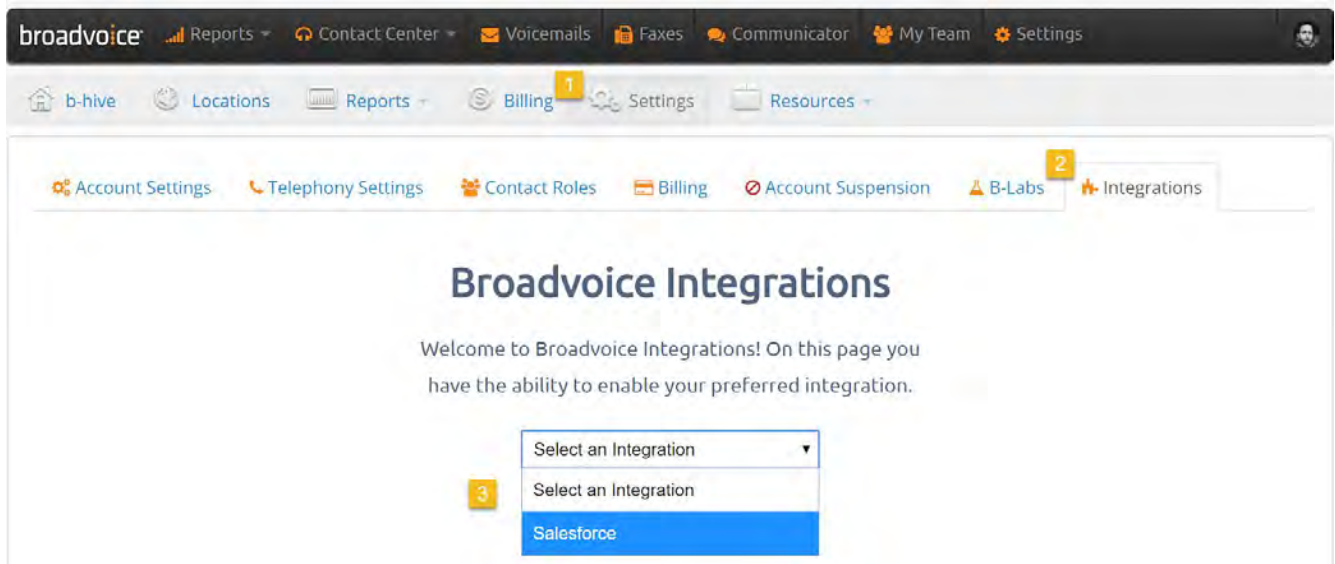
- Active Broadvoice b-hive account
- User(s) must have an integration-enabled Pro seat
- Active Salesforce account (Essentials, Performance, Professional, Enterprise, Unlimited)
- Integration users added to Salesforce call center

Installation & Setup

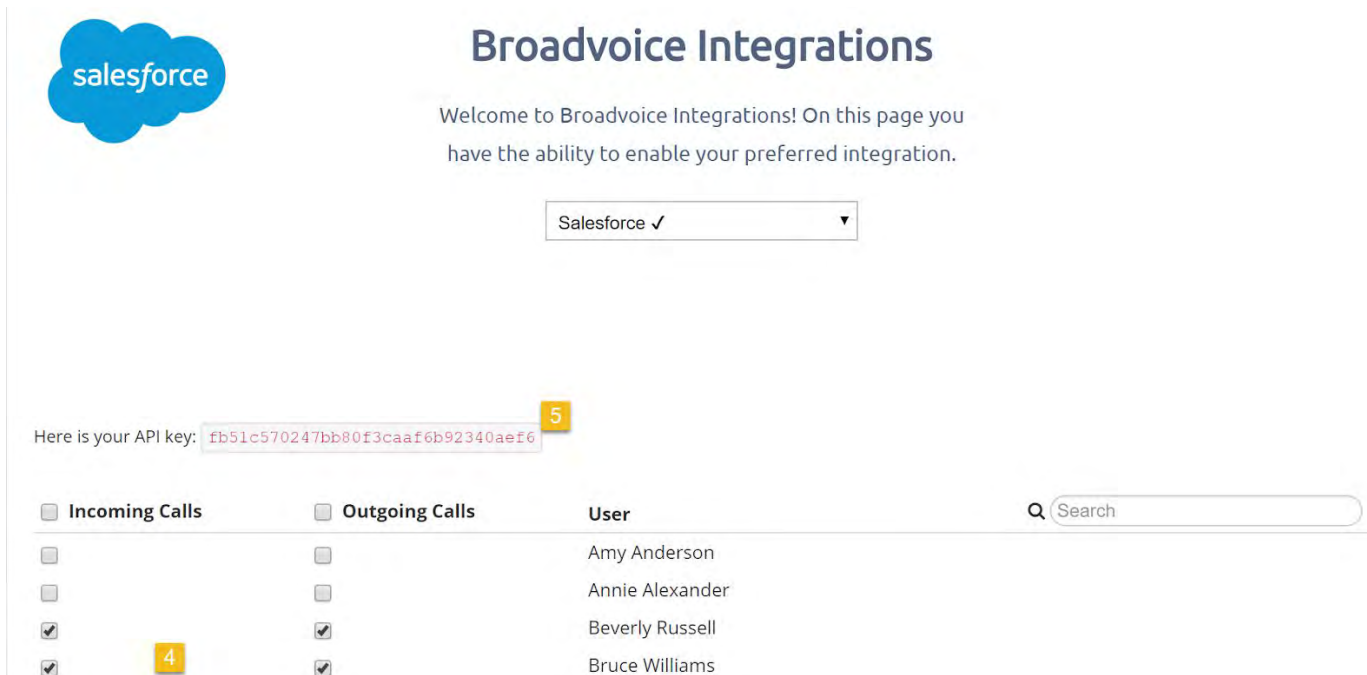
Enabling b-hive users

Users needing the ability to use the Salesforce integration must be enabled in the b-hive account by an account admin.

1. Select the Settings tab
2. Select the Integrations tab
3. Select Salesforce from Integrations drop-down



4. Select inbound/outbound for all users needing access
5. Copy API Key for later use



Installing in Salesforce

The Broadvoice integration can be located in the Salesforce AppExchange. Once found, follow the below steps for installation.

1. Select 'Install for all Users'
2. Click Install
3. Grant third-party access and select Continue



Install b-hive for Salesforce

By Broadvoice (Partner Main*)

1


☒ Install for Admins Only


☐ Install for All Users

2


☐ Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
b-hive for Salesforce	Broadvoice (Partner Main*)	Broadvoice	1.20

Description

Broadvoice simplifies communications for small call center, and collaboration features in one affordable rates.

Additional Details

[View Components](#)

3

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?

Website	SSL Encrypted
api.xbp.io	☒
login.salesforce.com	☒
test.salesforce.com	☒

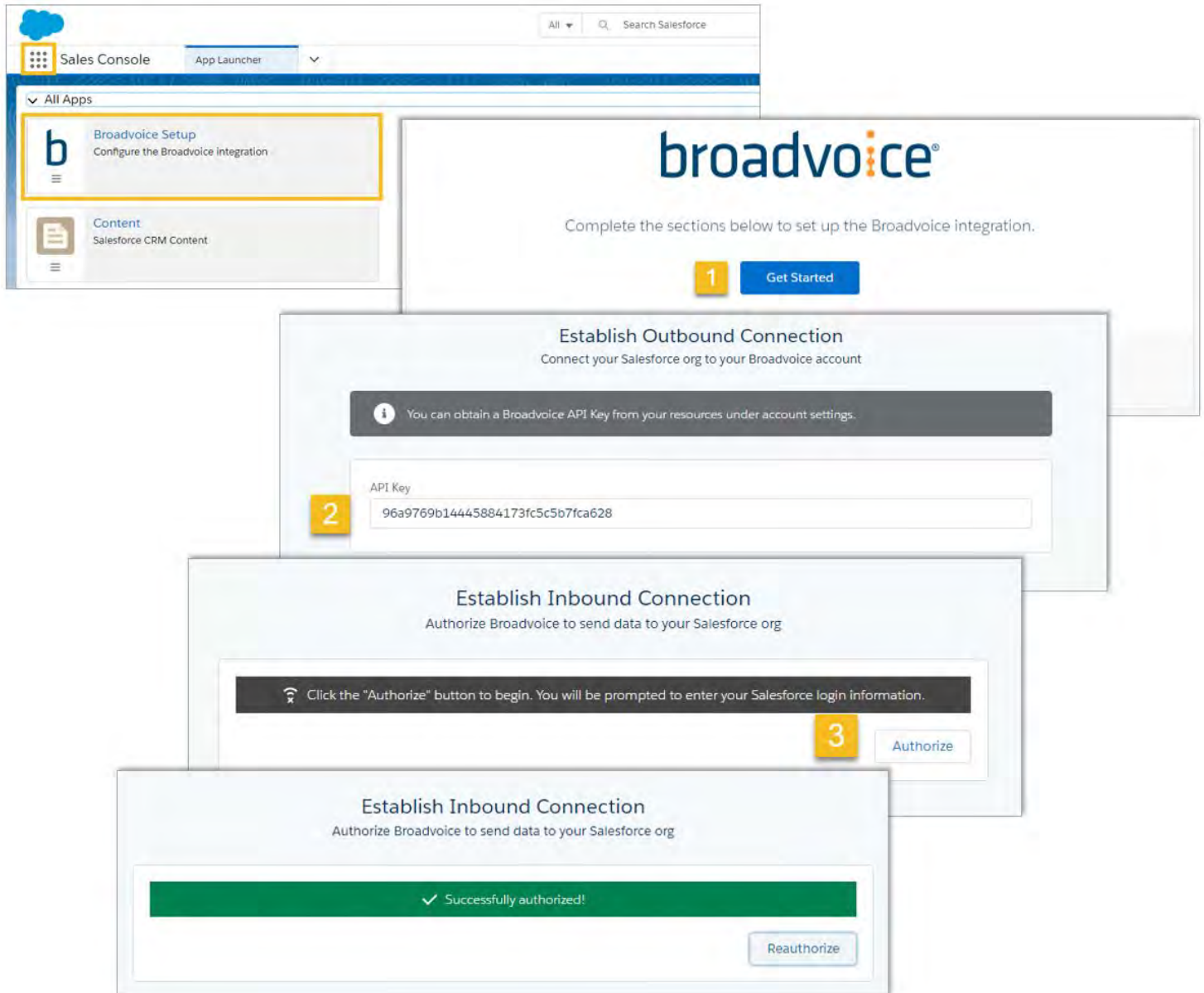
☒ Yes, grant access to these third-party web sites

Continue

Cancel

Then click on the App Launcher icon in the upper left-hand corner (Lightning) and choose Broadvoice Setup. This will begin a simple wizard. Walk through the following steps to complete.

1. Click Get Started
2. Paste the API Key located on the b-hive integrations page
3. Click Authorize



Then you'll need to add the CTI Softphone to the app your company uses within Salesforce (Lightning Only)

1. Find App Manager in Setup
2. Click Edit to the right of the app needing the CTI
3. Select Utility Items
4. Add Open CTI Softphone Item
5. Click Save

The image shows two overlapping screenshots from the Salesforce Lightning interface. The top screenshot is the 'Lightning Experience App Manager' page, displaying a table of installed apps. The bottom screenshot is the 'Utility Items' configuration page for a specific app.

Top Screenshot: Lightning Experience App Manager

Left sidebar: Setup > Apps > App Manager (marked with a yellow '1').

Main table: 15 items, Sorted by App Name. The table lists various apps including Broadvoice Setup, Community, Content, Lightning Usage App, Marketing, Platform, Sales, and Sales Console. The 'Sales Console' app is highlighted with a yellow '2' next to its 'Edit' button.

Bottom Screenshot: Utility Items Configuration

Left sidebar: APP SETTINGS > Utility Items (marked with a yellow '3').

Main content: 'Utility Items' section with a search bar and a list of items. The 'Open CTI Softphone' item is selected and highlighted with a yellow '4'.

Right panel: 'Properties' for 'Open CTI Softphone'. It shows 'Utility Item Properties' with fields for Label (Phone), Icon (call icon), Panel Width (340), and Panel Height (480). The 'Save' button is highlighted with a yellow '5'.

Note: Changing the Softphone Label to 'b-hive' or 'Broadvoice' can help identify its location for users.

When complete, click **Back** in the upper righthand corner to return to setup.

Enabling Salesforce Users

You'll need to designate which users you would like to have access to the Broadvoice CTI.

1. Select Call Centers Under Setup
2. Click on Broadvoice
3. Click Manage Call Center Users
4. Find the users and add them to the Call Center

The first screenshot shows the Salesforce Setup interface. The left sidebar has 'Setup' selected, and the main content area is titled 'Call Centers'. The 'Call Centers' link in the sidebar is highlighted with a yellow box and a red '1'. The main content area shows 'All Call Centers' with a table listing call centers. The 'Broadvoice' call center is highlighted with a yellow box and a red '2'.

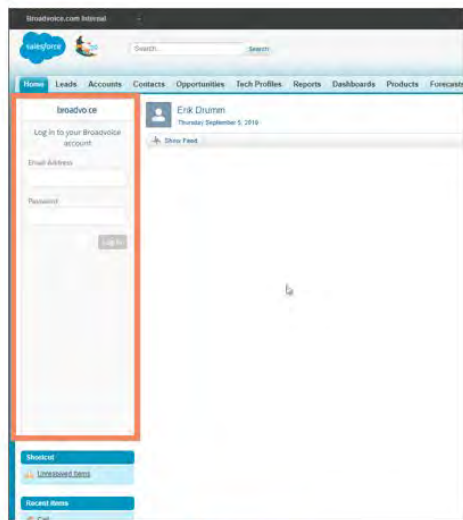
The second screenshot shows the 'Call Center Users' page. The 'Manage Call Center Users' button is highlighted with a yellow box and a red '3'. The page title is 'Call Center Users by Profile' and the total count is 0.

The third screenshot shows the 'Search for New Users' page. The 'Find' button is highlighted with a yellow box and a red '4'. The page title is 'Broadvoice: Search for New Users'. Below the title, there are search criteria fields and a 'Find' button. The search criteria fields are labeled 'Filter By Additional Fields (Optional)'. Below the search criteria fields, there is a table of users. The first user, 'Adamsen, Adam', is highlighted with a yellow box and a red '4'.

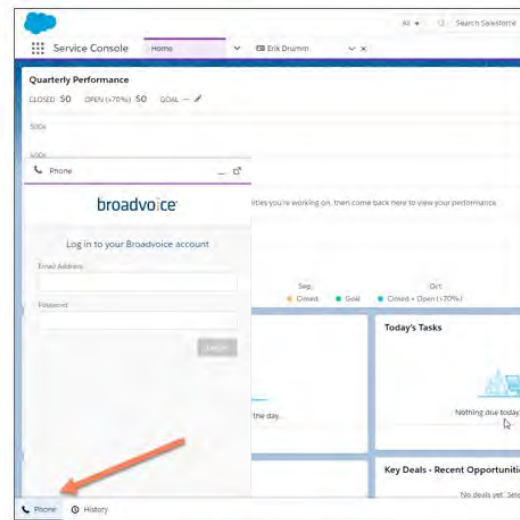
Full Name	Alias	Username	Role
Adamsen, Adam	aadam	aa@adamsen.adam	
Adamsen, Adam	aadam	aa@adamsen.adam	

Verifying Installation

To ensure the package has been setup correctly, click Home (SF Classic) or launch the appropriate application from the App Manager and click the phone icon in the bottom left-hand part of the screen (SF Lightning). You should see a login screen with a Broadvoice logo.



Classic

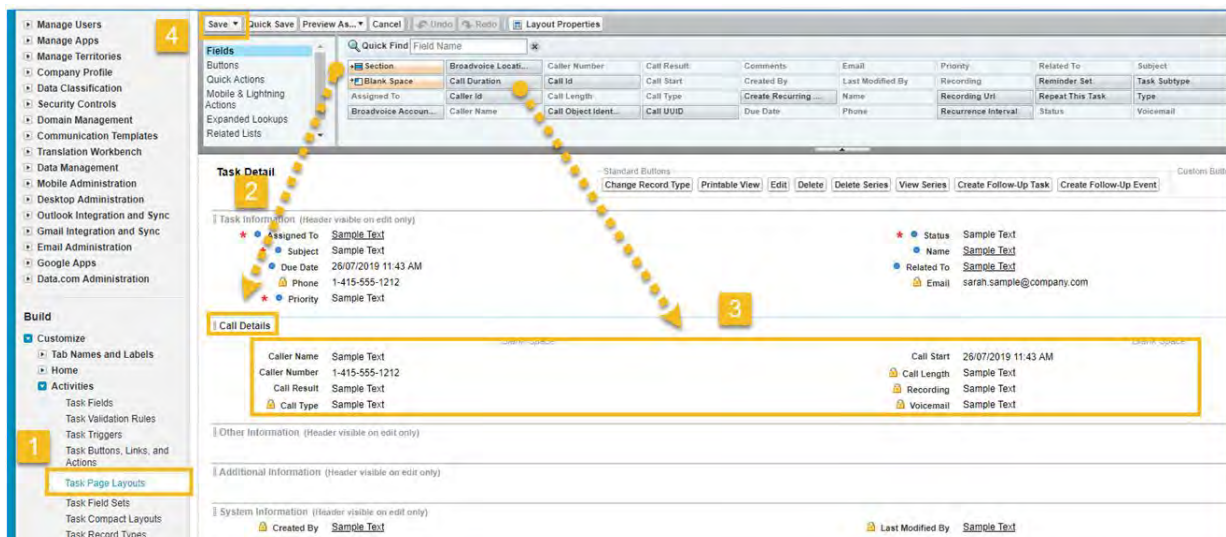


Lightning

Creating Custom Views

As a Salesforce admin, you can create custom layouts as well as designate which views are available to specific user roles. Available call fields are: length, type, result, comments, recording URL and voicemail URL. Follow these simple steps below:

1. Select Task Page Layout in Setup
2. Add a Section Named Call Details
3. Add any Call-related Fields Desired
4. Click Save



Profile Permission Sets

The CTI package requires user profile access to many fields. For some organizations, these fields might be restricted based on the configuration of Salesforce. To easily grant access, you can assign permission sets provided upon installation of the CTI package.

API User

The API User Permission Set allows Salesforce administrators or API Users to link custom elements to your b-hive account. To add, navigate to Permission Sets in Setup, and assign to the desired user.

The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Permission Sets' link is highlighted under the 'Users' section. The main content area displays the 'Broadvoice CTI API User' permission set. A yellow box highlights the name 'Broadvoice CTI API User' at the top. Below it, a yellow arrow points to the 'Manage Assignments' button. The 'Permission Set Overview' section contains the following details:

Field	Value
Description	Assign permissions to API User responsible for handling data and integration traffic between Broadvoice and the Salesforce org.
API Name	Broadvoice_CTI_API_User
License	
Namespace Prefix	broadvoice
Session Activation Required	☐
Created By	Erik Drumm, 25/02/2020 10:13 AM
Last Modified By	Erik Drumm, 25/02/2020 10:13 AM

Below the overview, there are sections for 'Apps', 'Assigned Apps', and 'Assigned Connected Apps', each with a description of their function in the app menu.

Broadvoice User

The Broadvoice CTI Permission Set allows access to missed calls which is a custom object available with the CTI. To add, navigate to Permission Sets in Setup and assign to the desired user(s).

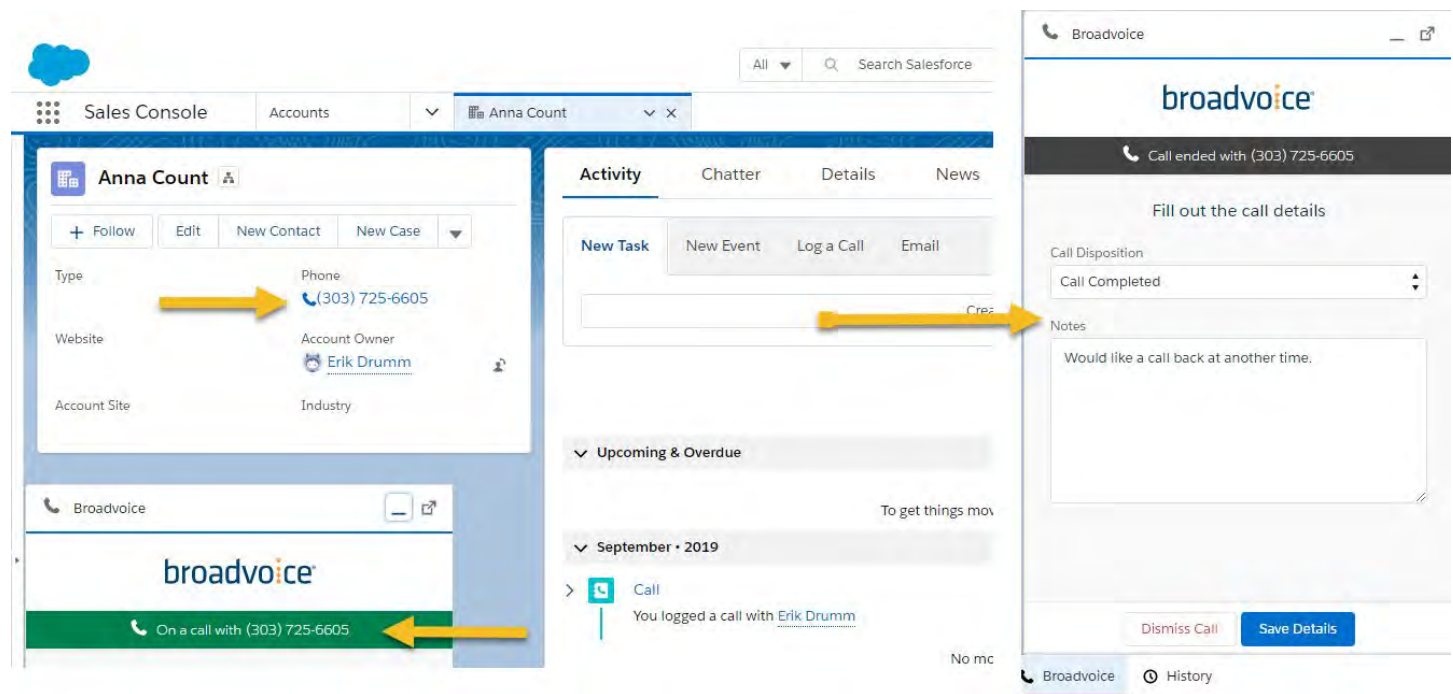
The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Permission Sets' link is highlighted under the 'Users' section. The main content area displays the 'Broadvoice CTI' permission set. A yellow box highlights the name 'Broadvoice CTI' at the top. Below it, a yellow arrow points to the 'Manage Assignments' button. The 'Permission Set Overview' section contains the following details:

Field	Value
Description	Enables a user to utilize the Broadvoice CTI component and other features in the Broadvoice app.
API Name	Broadvoice_CTI
License	
Namespace Prefix	broadvoice
Session Activation Required	☐
Created By	Erik Drumm, 25/02/2020 10:13 AM
Last Modified By	Erik Drumm, 25/02/2020 10:13 AM

Below the overview, there are sections for 'Apps', 'Assigned Apps', and 'Assigned Connected Apps', each with a description of their function in the app menu.

Placing Calls

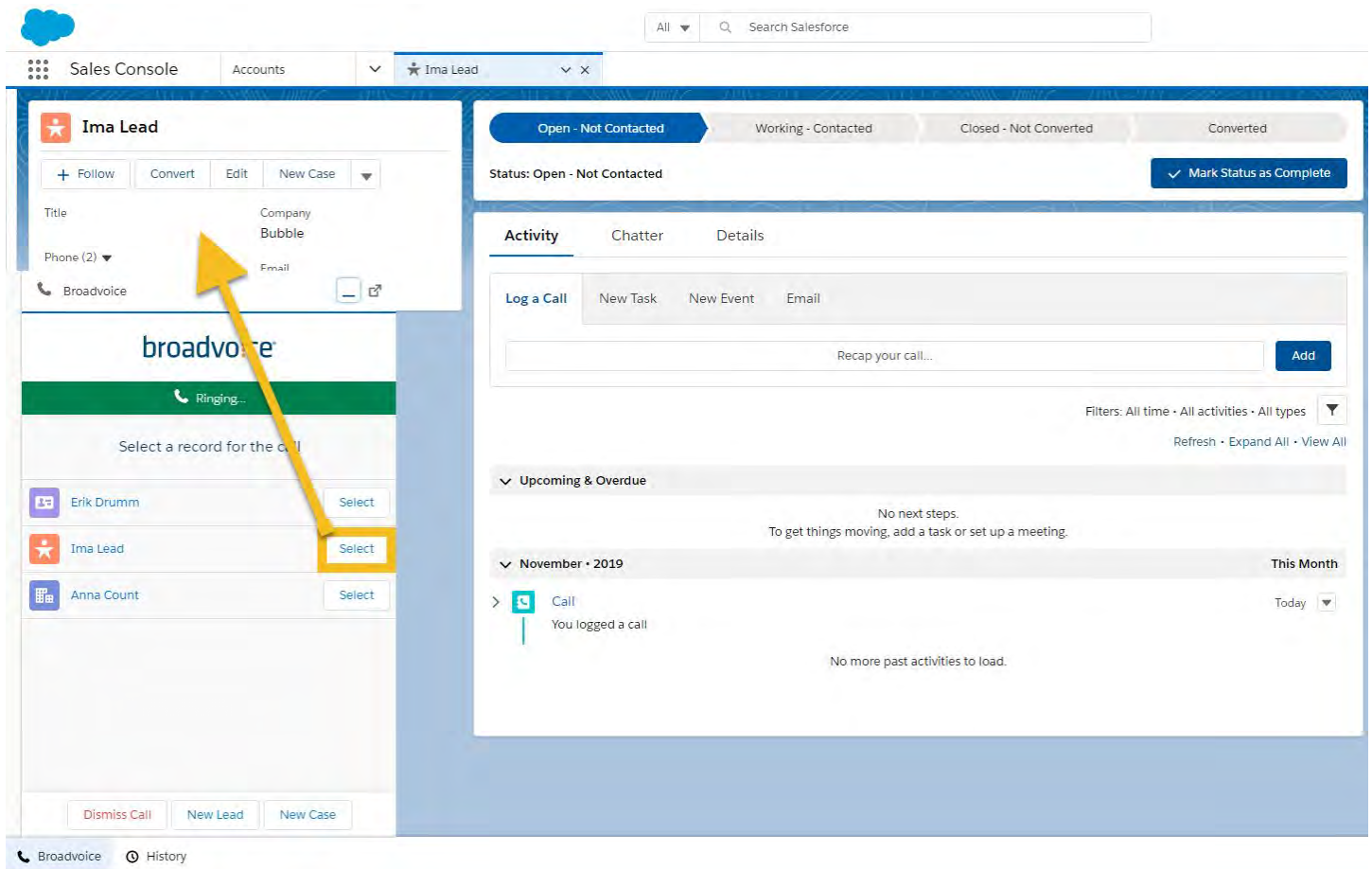
Navigate to the record you would like to have the call activity logged in and click the phone icon next to the number you wish to dial. This will initiate a call to your devices. Answering will then place the call. The CTI will show you on a call with the number. Once the call is completed, you can add call disposition and notes or simply dismiss the call. *calls received while on an active call will be designated as 'missed calls'.



Receiving Calls

Matching Contacts

Incoming calls will match the calling number with records within Salesforce. These records can be contacts, accounts, leads, or cases. If multiple records are matched, click Select next to the record you would like to have the call activity associated with. This will launch that record within Salesforce. You may also choose to dismiss the call. *calls received while on an active call will be designated as 'missed calls'.



New Contacts

Incoming calls that do not match numbers allow you to create either a new lead, a new case, or simply dismiss the call.

Creating New Leads & Cases

You can easily create a new lead or contact from inbound calls clicking the related button at the bottom of the active call window. You can then add details related to the new record. Once added, you will then be able to add a disposition and notes for the call activity on the newly created record.

The screenshot illustrates the Broadvoice interface during an inbound call. On the left, the 'Accounts' sidebar shows a list of accounts, with 'Anna Count' selected. The main window displays the 'Broadvoice' call interface, which is currently in a 'Ringing' state. A yellow box highlights the message 'No records with a matching phone number found' under the 'Select a record for the call' section. At the bottom of the call window, there are three buttons: 'Dismiss Call', 'New Lead', and 'New Case'. Two yellow arrows originate from these buttons. The first arrow points from the 'New Lead' button to the 'Create a Lead for the call' form. The second arrow points from the 'New Case' button to the 'Create a Case for the call' form. Both forms are open and show fields for 'First Name', 'Last Name', 'Company', 'Phone', and 'Status'. The 'Create a Case' form also includes fields for 'Subject', 'Status', 'Priority', and 'Case Origin'. The 'Phone' field in both forms is populated with the number '17472025602'. The 'Status' dropdown in the 'Create a Lead' form is set to 'Working - Contacted'. The 'Subject' field in the 'Create a Case' form is populated with 'New Order'. The 'Status' dropdown in the 'Create a Case' form is set to 'New'. The 'Priority' dropdown is set to 'Medium'. The 'Case Origin' dropdown is set to 'Phone'. The 'Phone' field in the 'Create a Case' form is also populated with '17472025602'. At the bottom of each form, there are buttons for 'Dismiss Call', 'Cancel', and 'Create'.