b·hive

SALESFORCE INTEGRATION

PRODUCT TUTORIAL

Version 1.0 | March 2020

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

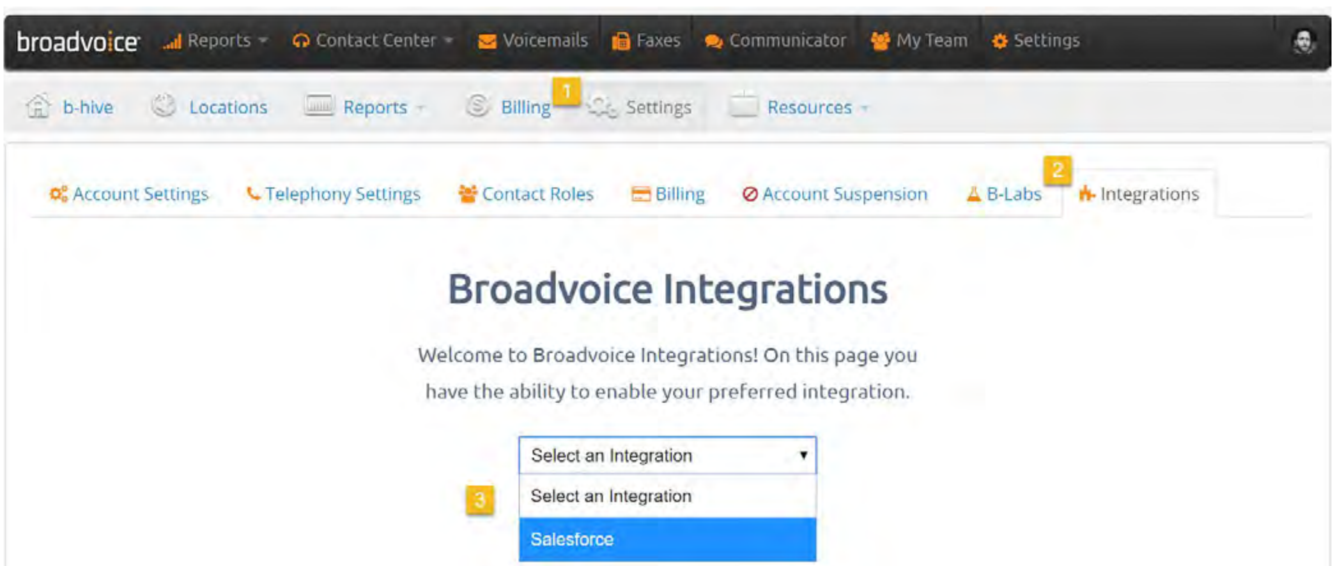
- Active Broadvoice b-hive account
- User(s) must have an integration-enabled Pro seat
- Active Salesforce account (Essentials, Performance, Professional, Enterprise, Unlimited)
- Integration users added to Salesforce call center

Installation & Setup

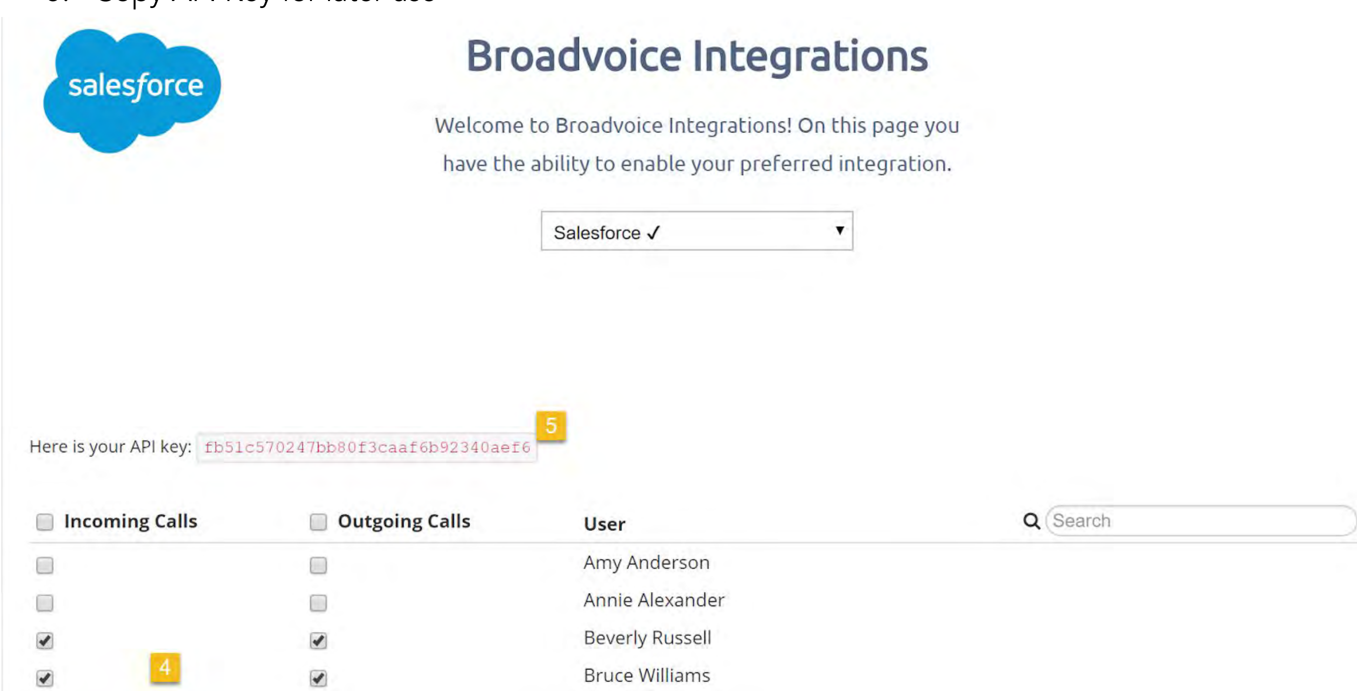
Enabling b-hive users

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



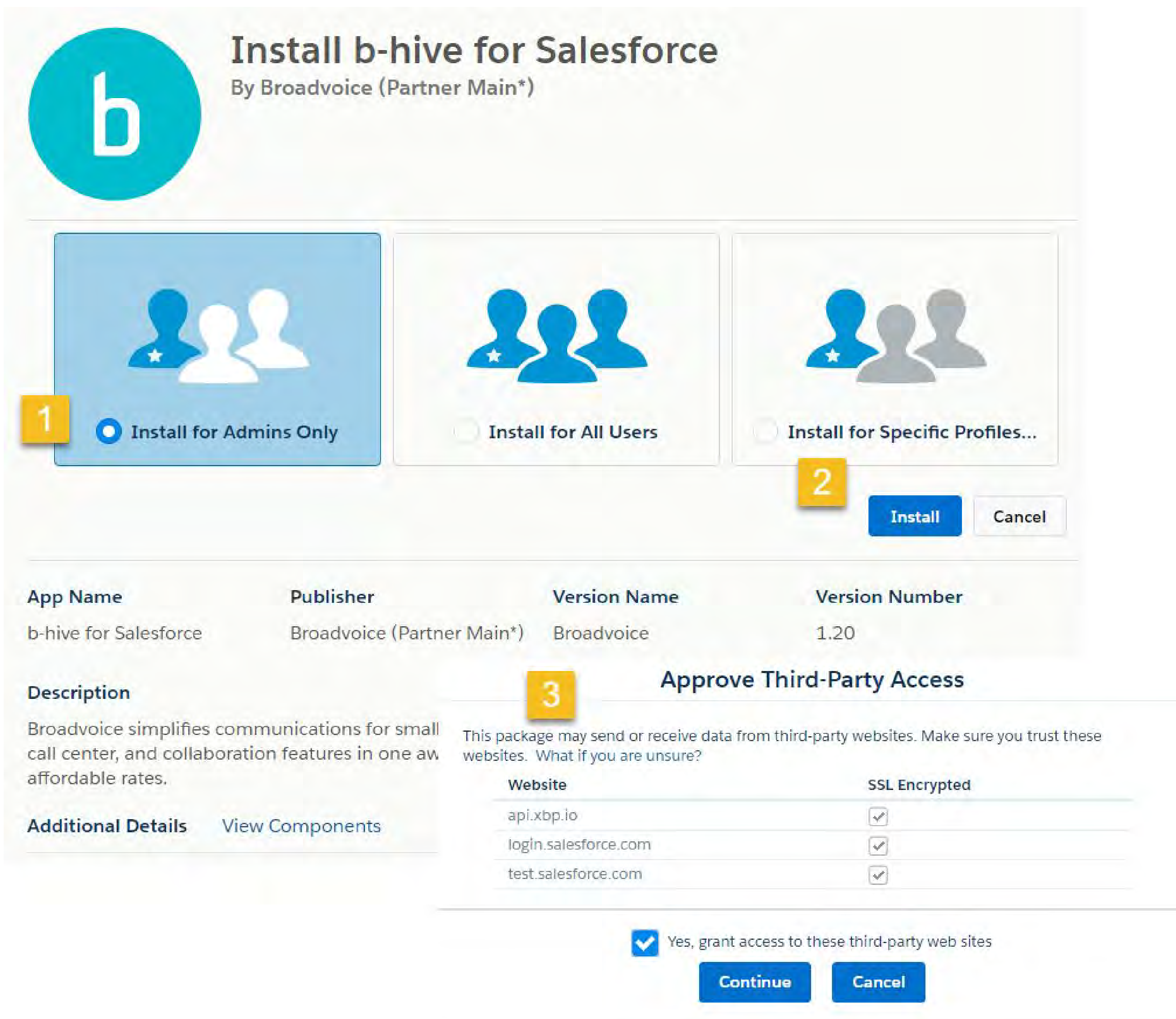
4. Select inbound/outbound for all users needing access
5. Copy API Key for later use



Installing in Salesforce

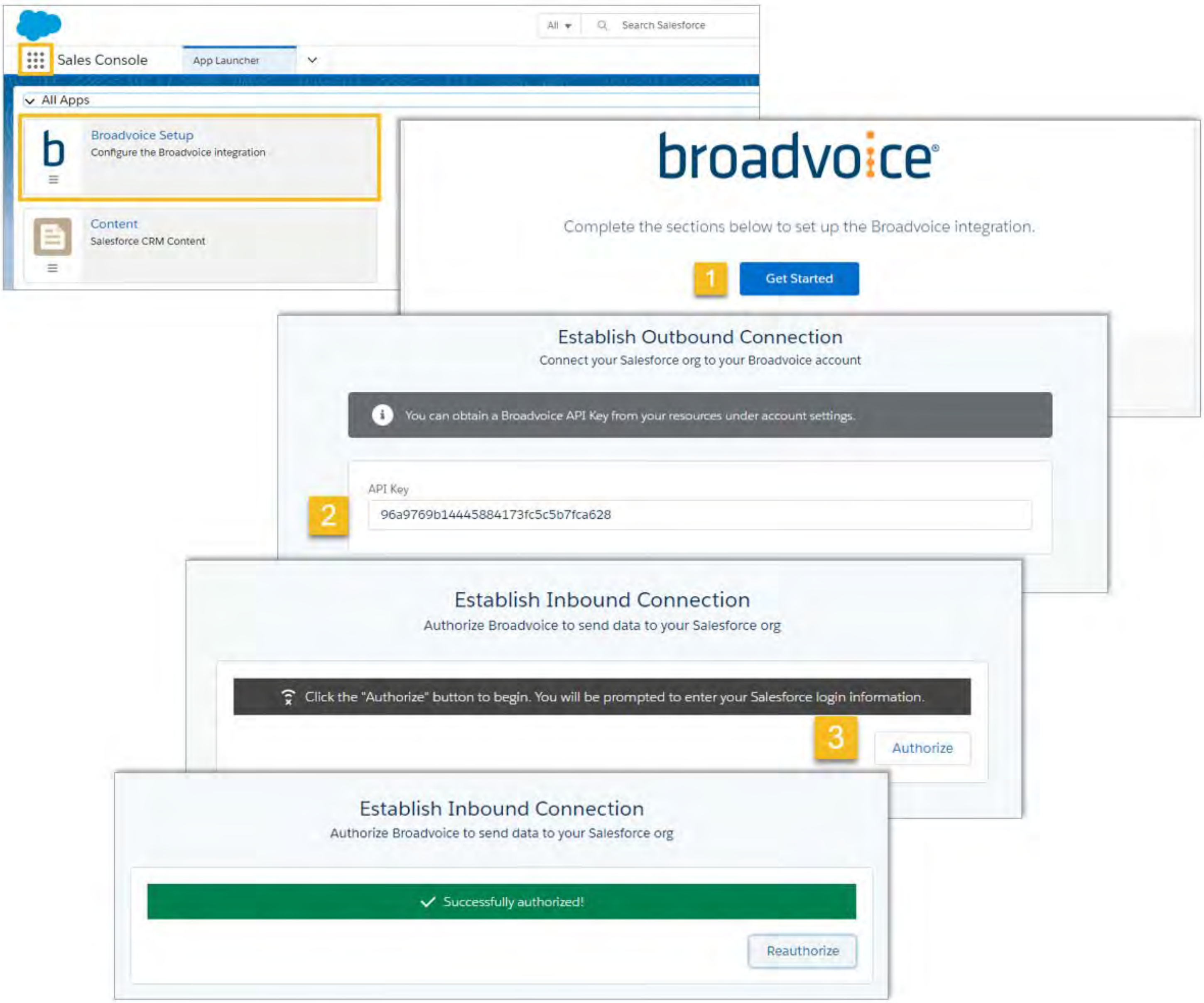
The Broadvoice integration can be located in the Salesforce AppExchange. Once found, follow the below steps for installation.

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



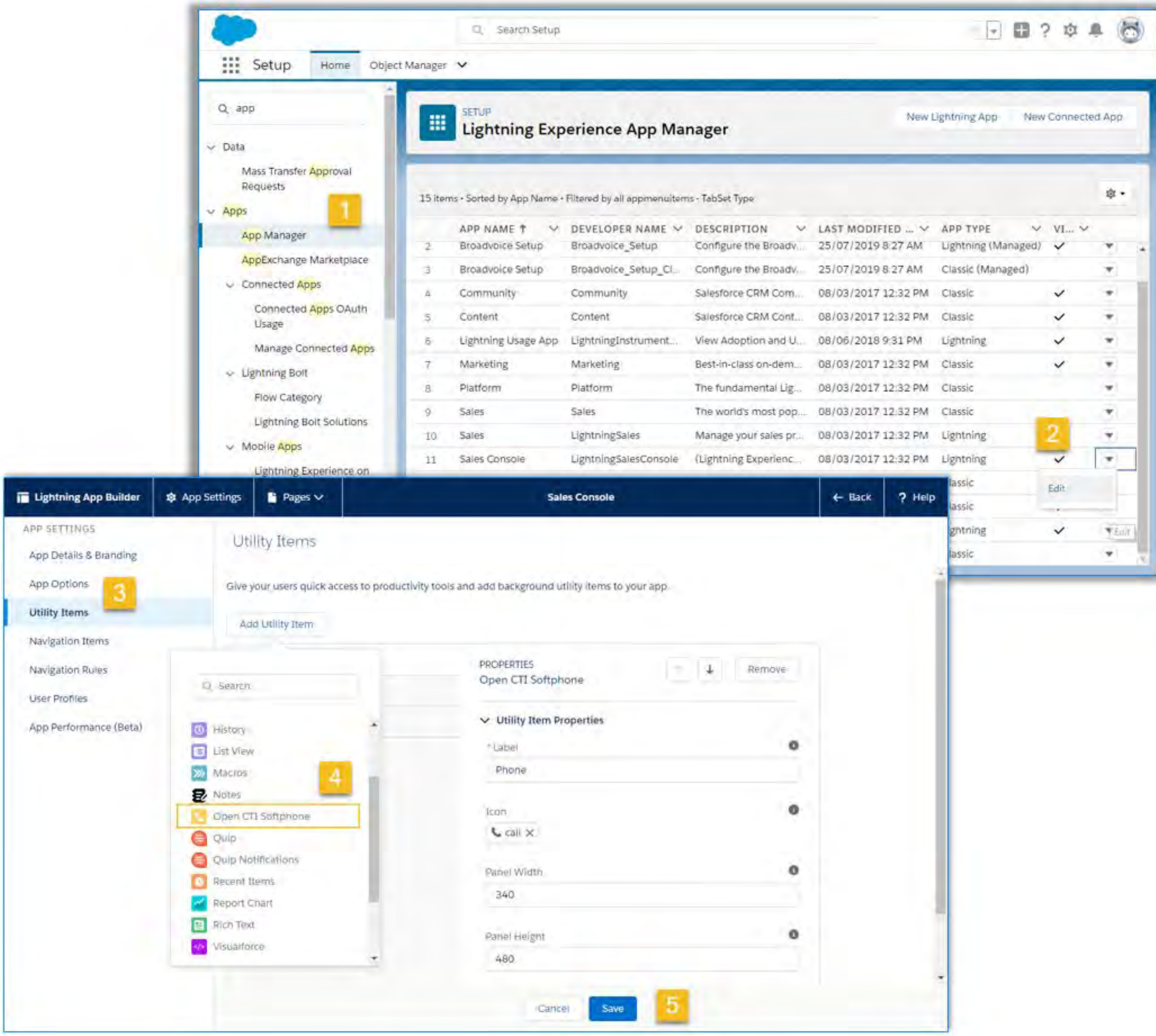
Then click on the App Launcher icon in the upper left-hand corner (Lightning) and choose Broadvoice Setup. This will begin a simple wizard. Walk through the following steps to complete.

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



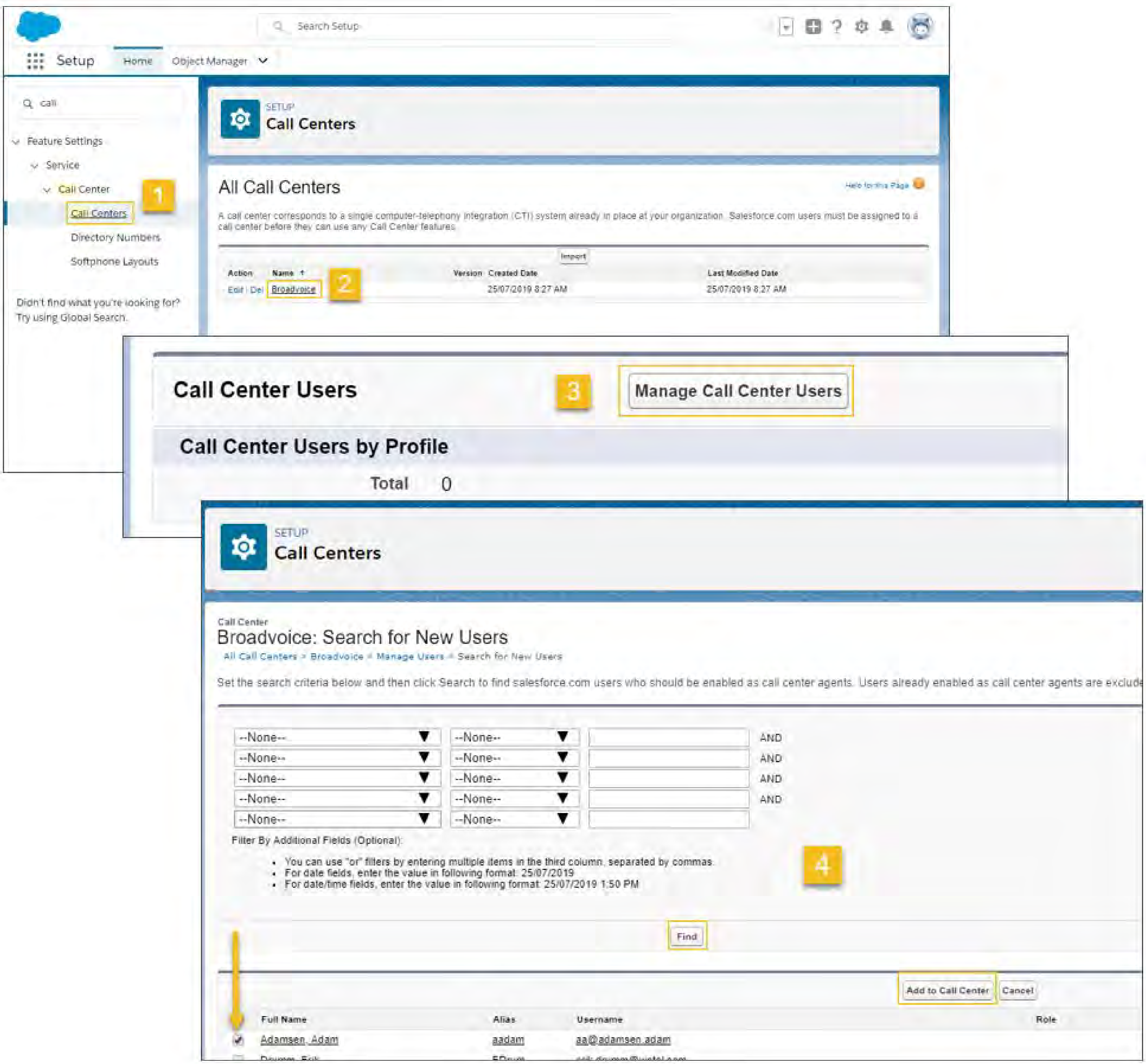
Note: Changing the Softphone Label to 'b-hive' or 'Broadvoice' can help identify its location for users.

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

Enabling Salesforce Users

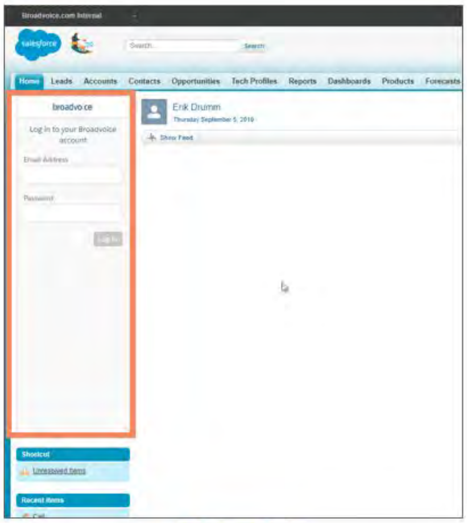
You'll need to designate which users you would like to have access to the Broadvoice CTI.

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

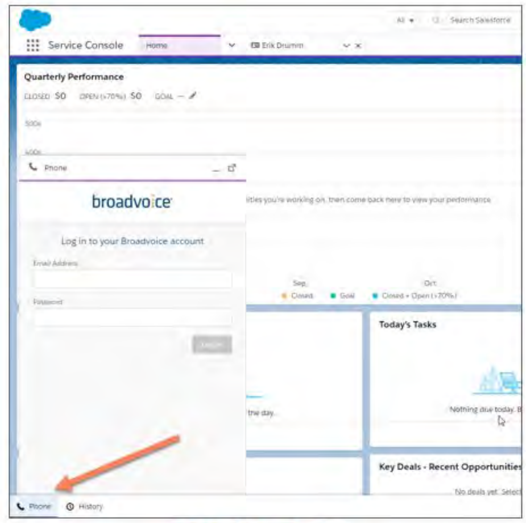


Verifying Installation

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

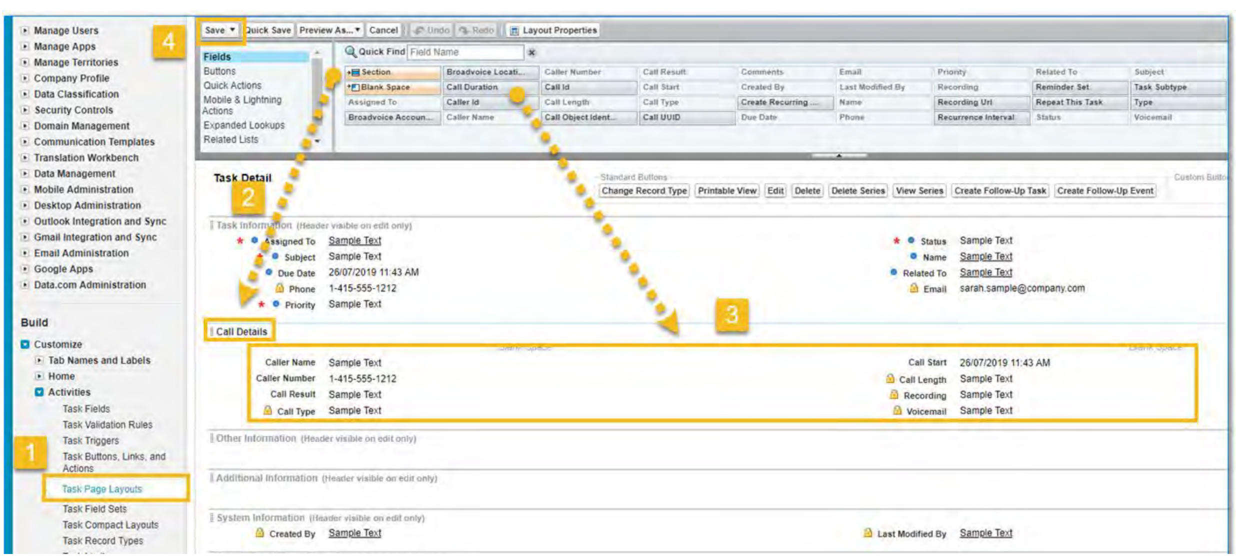


Lightning

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

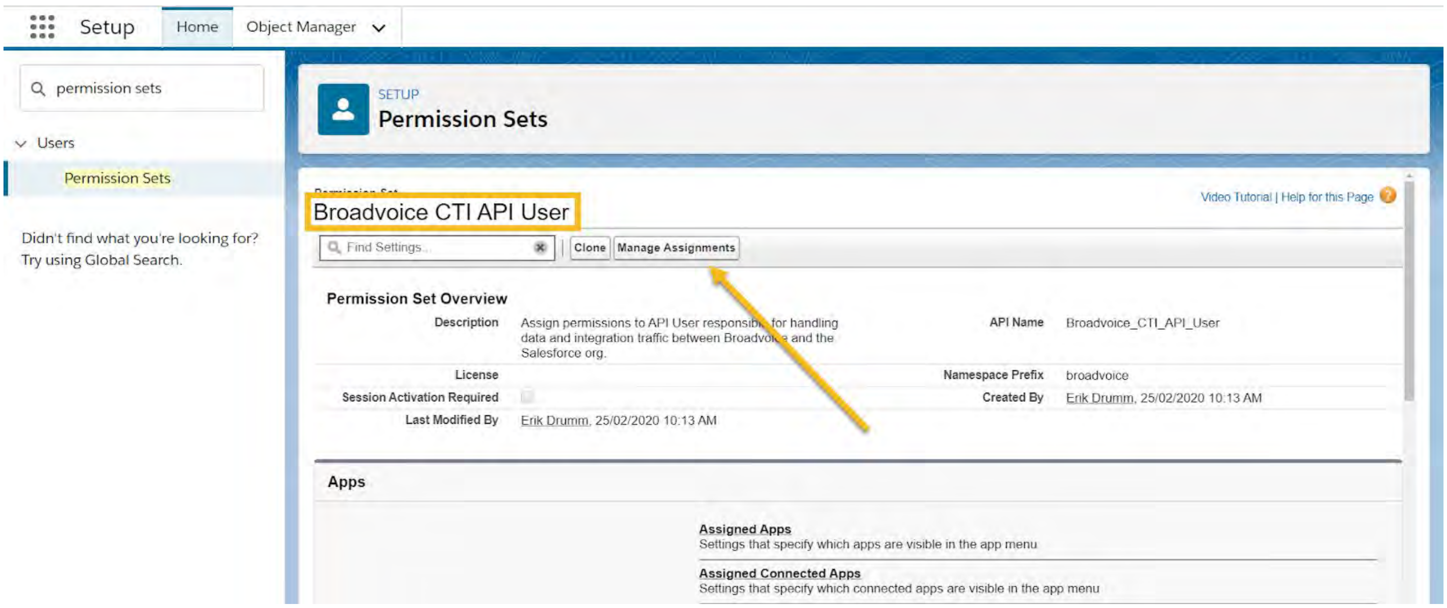


Profile Permission Sets

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.

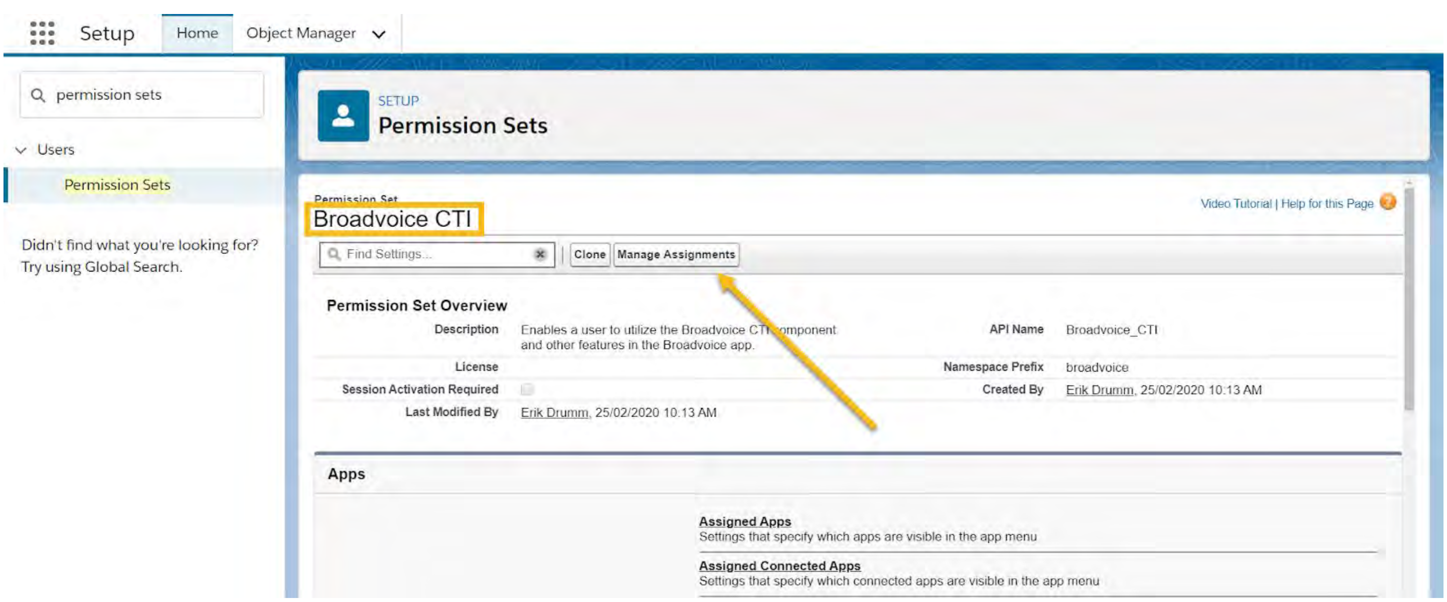
API User

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.



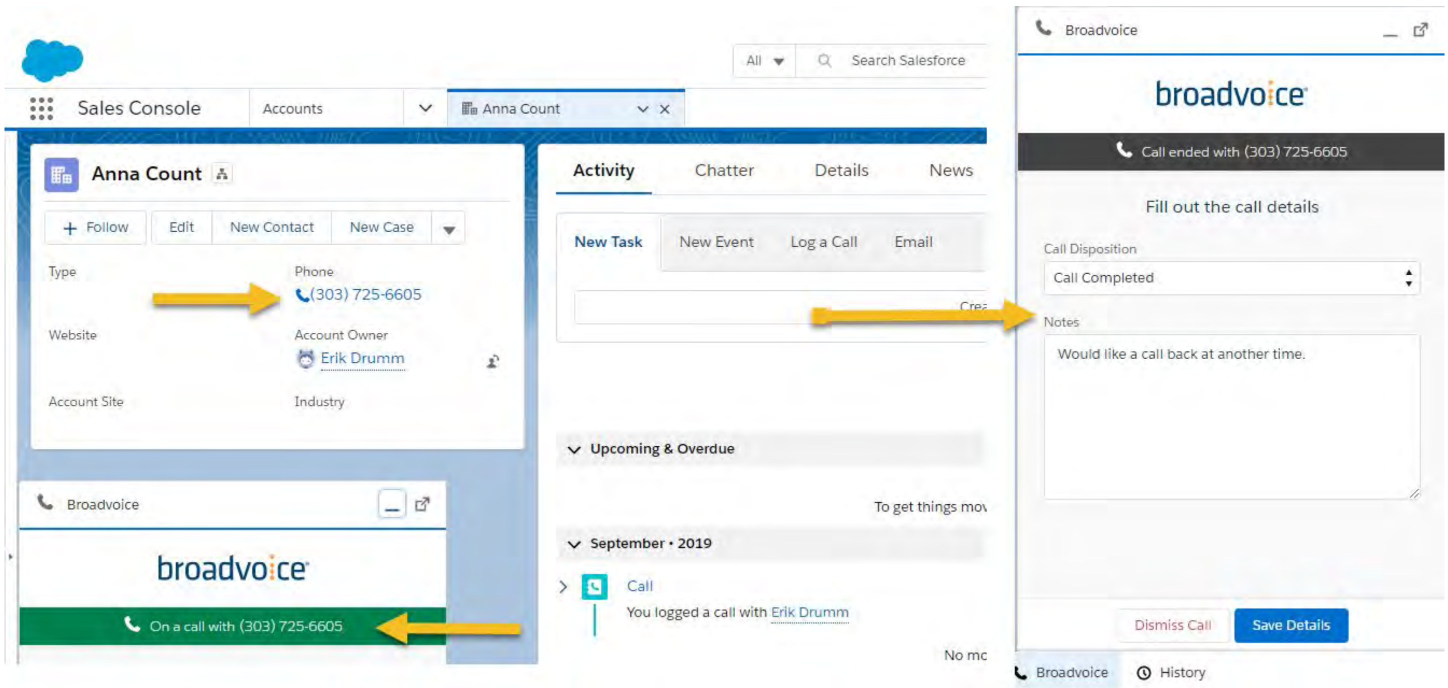
Broadvoice User

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).



Placing Calls

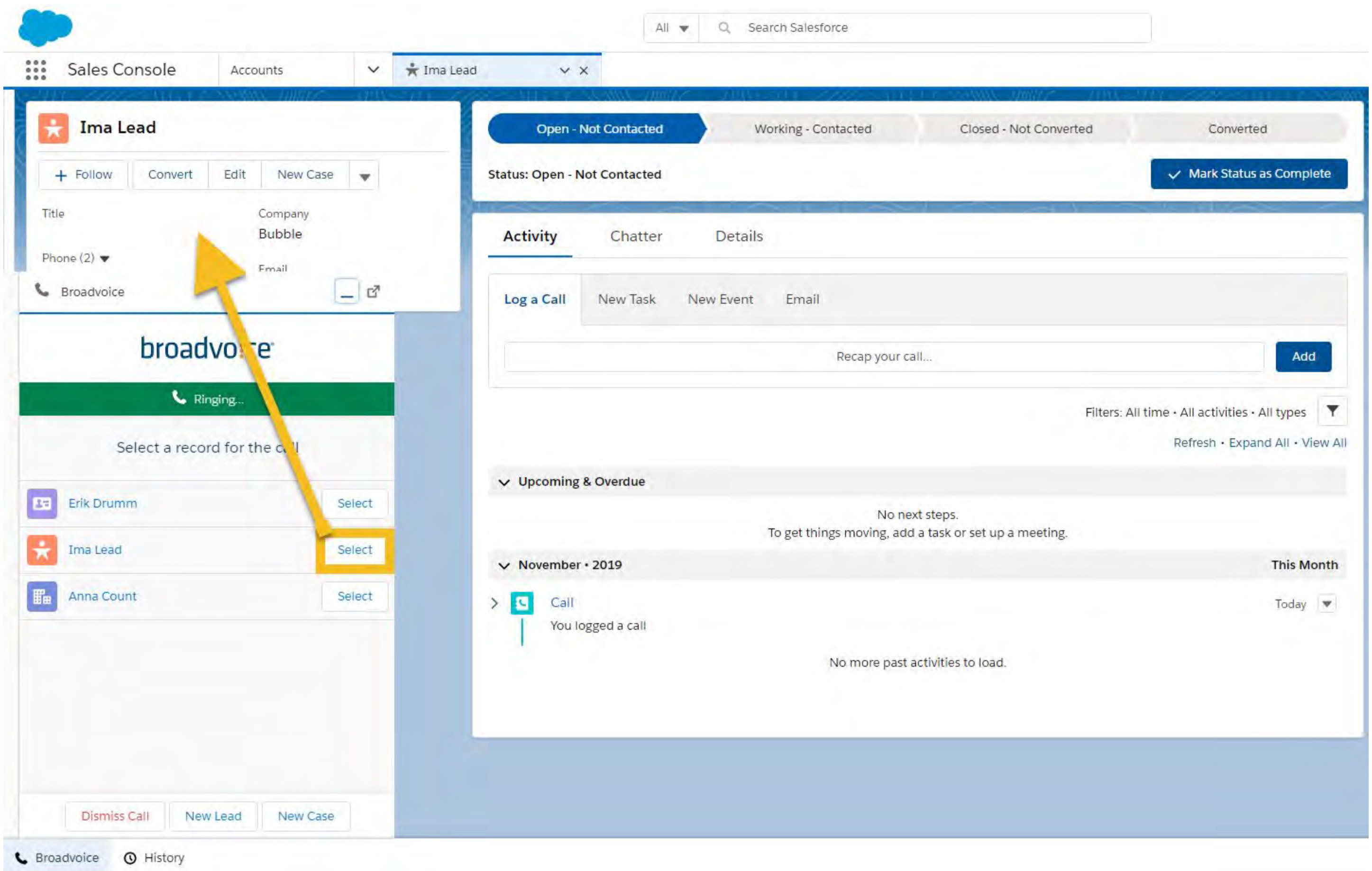
Navigate to the record you would like to have the call activity logged in and click the phone icon next to the number you wish to dial. This will initiate a call to your devices. Answering will then place the call. The CTI will show you on a call with the number. Once the call is completed, you can add 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.