



Fuze for Salesforce

Fuze Enablement Team

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Training Objectives

After attending this training, users should have a basic understanding of:

- Overview, signing into, and layout of Fuze for Salesforce
- Connector features, including placing, receiving, and managing calls
- Creating and searching contacts and opportunities
- Additional features and capabilities

Application Overview

Overview

Fuze for Salesforce is an application which is embedded within the Salesforce interface to help sales and support organizations work more efficiently. The application will track, match, and log telephone calls. Using Fuze for Salesforce, an end user can easily perform tasks such as creating contacts and opportunities, as well as accessing customer records.



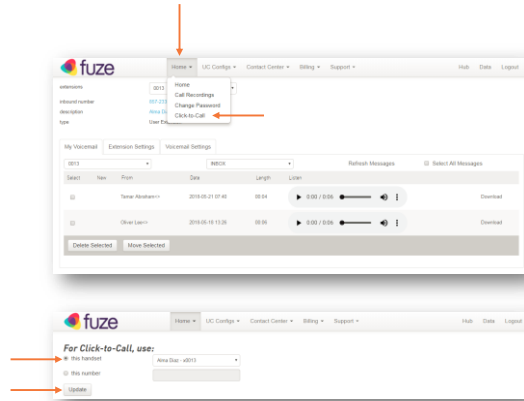
Configuring Click-to-Call within the Portal

Click-to-Call enables a user to place a phone call by clicking on a phone number within Fuze for Salesforce.

- Log into the Fuze Customer Portal
- Click the **Home** menu and then select **Click-to-Call**
- Choose the appropriate device from the **this handset** dropdown
- Click **Update**



A user may select any Fuze device or an external phone number to place calls.



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When **Click-to-Call** is configured and a telephone number has been selected, the device that has been designated as the preferred **Click-to-Call** device will ring. Once that device is answered, the call will then be connected to the far end.

If **this handset** is selected, choose the Fuze device that will integrate with Click-to-Call from the drop-down menu. If the second option, **this number** is selected, the full phone number must be entered and **Click-to-Call** will use that telephone number to connect to the far end.

In order to utilize the **Click-to-Call** feature, Fuze for Salesforce must operate in conjunction with another Fuze device (desk phone, Fuze Desktop, or Fuze Mobile).

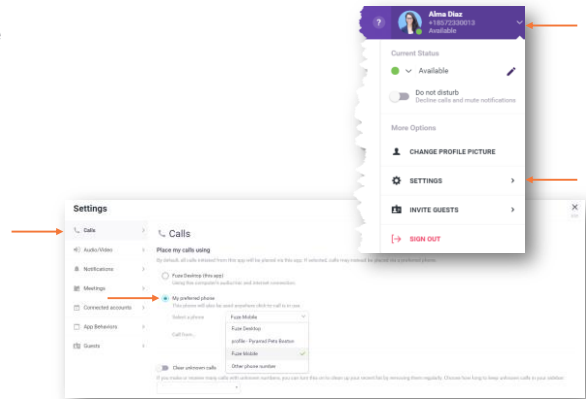
Configuring Click-to-Call within Fuze Desktop

Click-to-Call enables a user to place a phone call by clicking on a phone number within Fuze for Salesforce.

- Log into Fuze Desktop
- Click the profile dropdown menu
- Select **SETTINGS**
- Select **Calls**
- Click the button by **My preferred phone** and **select a phone**



A user may select any Fuze device or an external phone number to place calls.



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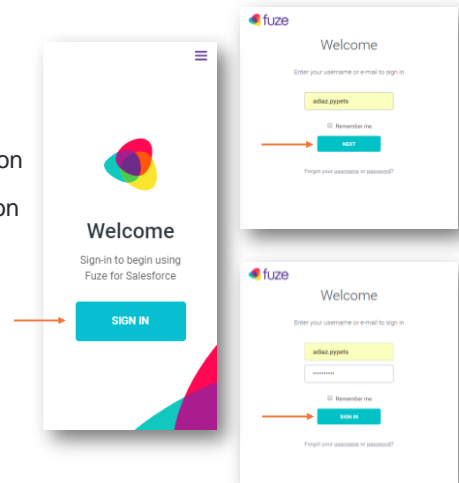


When **Click-to-Call** is configured and a telephone number has been selected, the device that has been designated as the preferred **Click-to-Call** device will ring. Once that device is answered, the call will then be connected to the far end.

If **this handset** is selected, choose the Fuze device that will integrate with Click-to-Call from the drop-down menu. If the second option, **this number** is selected, the full phone number must be entered and **Click-to-Call** will use that telephone number to connect to the far end.

Signing into Fuze for Salesforce

- Sign into Salesforce
- Click the **SIGN IN** button within Fuze for Salesforce
- Enter the username and then click the **NEXT** button
- Enter the password and then click the **SIGN IN** button

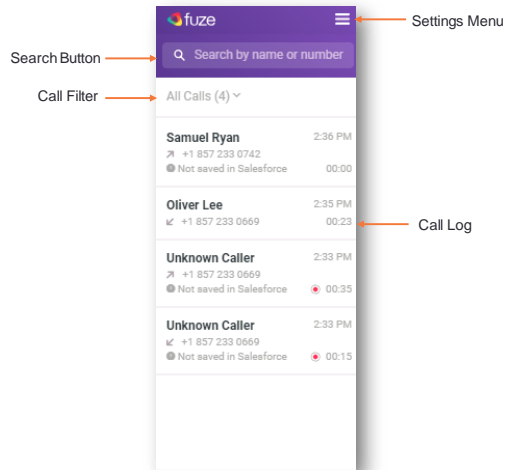


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If Single Sign On (SSO) is set-up for the organization, after the user enters a username, Fuze will automatically redirect to the SSO sign-in page. If the user is already signed in to SSO via the browser, then Fuze for Salesforce will automatically sign the user in.

Fuze for Salesforce Layout



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The Home screen lists the inbound and outbound calls from the past 24 hours. If a call is more than 24 hours old, it will no longer show in Fuze for Salesforce, but can still be found within Salesforce.

A user may utilize the **Search** button to find a contact by name or telephone number. Clicking the **All Calls** dropdown will provide additional filtering options.

Training Objectives

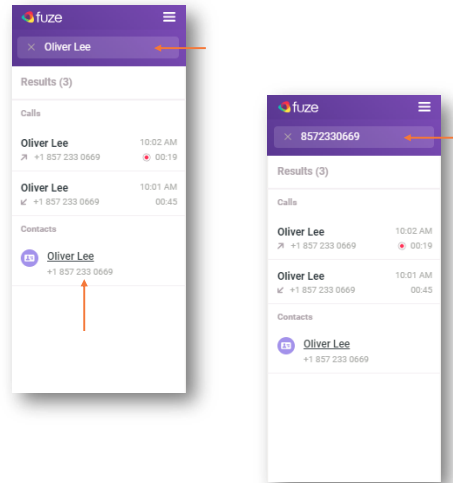
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Placing a Call

To place a call within Fuze for Salesforce:

- Type any part of the contact's name or the full telephone number to call in the Search field
- Press Enter
- Click the telephone number of the person to call in the search results
 - The preferred click-to-call device will ring
- Answer the device
 - The call will begin to ring the recipient



The recording status icon  is displayed when the call is being recorded.

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Calls must be placed utilizing Click-to-Call, which is built into Fuze for Salesforce. The person to whom the call is being placed must be a stored contact in Salesforce. Thus, the user will click on the stored contact's telephone number to initiate a call.

There is the ability to automatically link calls that are initiated via Click-to-Call. When a user clicks on an opportunity, account, or case, Fuze for Salesforce automatically associates the call log to the Salesforce contact from which the click-to-call was initiated. Hence, it is not necessary to manually create associations when using click-to-call, however if necessary, a user may manually override the association at any time.

Call recording is configured by a Fuze Administrator. If enabled, the user has the ability to pause and un-pause the recording from the active call screen by clicking on the recording status icon.

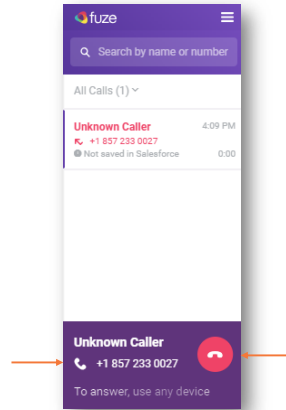
Receiving a Call

When a call is received, Fuze for Salesforce will notify the user of the incoming call.

- Answer the call via any Fuze device to be connected to the caller
- To reject or decline the call, use the selected device or click the  button within Fuze for Salesforce



If the call is being recorded, the recording status icon will appear at the top of the screen once the call has been answered.





Declined calls will be sent to the user's voicemail box.

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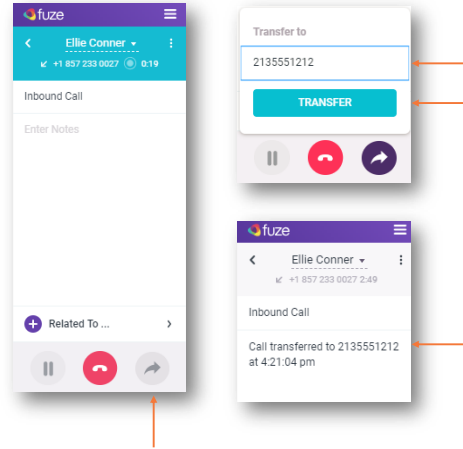
Transferring a Call

To transfer an active call within Fuze for Salesforce:

- Click the  button to initiate the transfer
- Type the telephone number or extension in the **Transfer to** field
- Click the  button





The transferred call will appear in the Call Log.



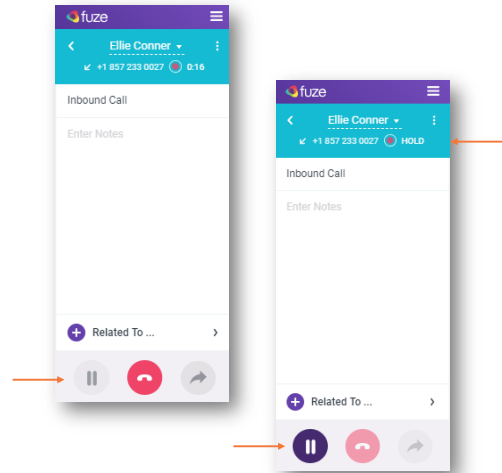
Placing a Call on Hold

To place a call on hold within Fuze for Salesforce:

- Click the  button to place an active call on hold
- Click the  button to resume a held call



Calls on hold will show the status of the held call at the top of the interface.



If a call is placed on hold via Fuze for Salesforce, it must be placed off hold (resumed) via Fuze for Salesforce. If a call is placed on hold via the Click-to-Call device, it must then be placed off hold via that same device.

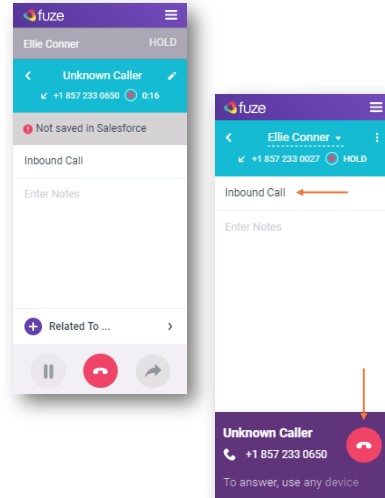
When the user clicks the **Resume** button to resume a held call, the preferred Click-to-Call device will ring. Once answered, the call will continue. When there are multiple calls, only one can be active; the other calls are automatically placed on hold.

Managing Multiple Calls

Fuze for Salesforce allows a user to handle multiple calls at one time.


When a user is notified of a second incoming call, the user may choose to answer or decline the new call.

- Answering a call while currently on a call, will automatically place the current call on hold
- Declining a call while currently on a call, will send the caller to the user's voicemail



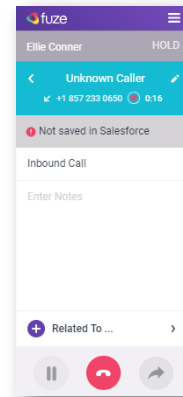
If a user is on a call and needs to place another call, the user can place the call on hold and then dial the second call from a device.

Ending a Call

- Click the  button to end the call within Fuze for Salesforce



The user may also end a call directly from the device.





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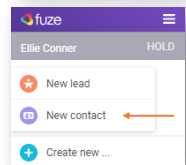
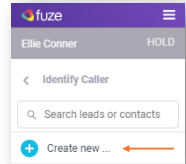
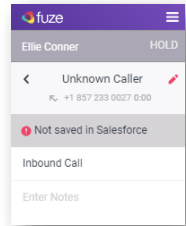
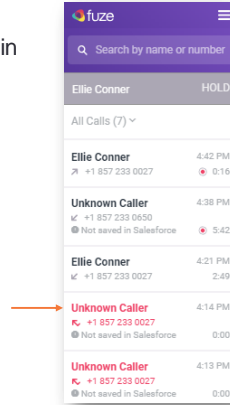
Adding a New Contact

Fuze for Salesforce allows a user to add a new Salesforce contact for an unknown caller directly within the connector.

- Click the **Unknown Caller** in the Call Log
- Click the  button to identify the caller
- Select **Create new...**
- Click the  button
- Fill in all applicable fields and then click the **Save** button




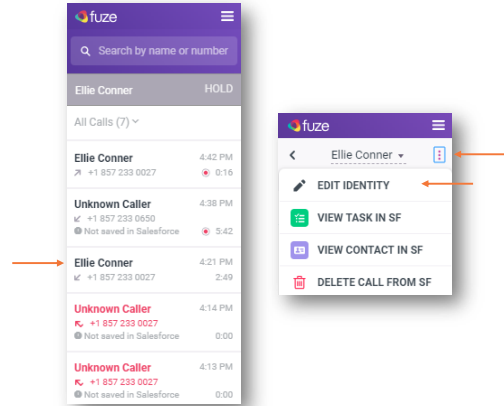
During an active call, the user can click the  button to edit the identity of the created contact; saved contacts can be found within the contacts in Salesforce.



Editing a Contact



Fuze for Salesforce allows a user to edit an existing Salesforce contact directly within the connector.

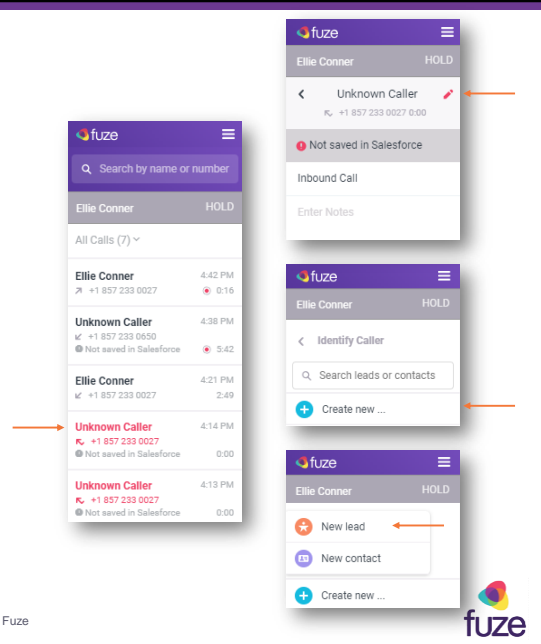
- Select a contact from the Call Log
- Click the  button
- Click **EDIT IDENTITY**
- Edit the contact detail and then click the **Save** button



Adding a New Lead



Fuze for Salesforce allows a user to add a new lead to an existing Salesforce opportunity directly within the connector.

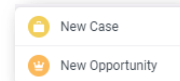
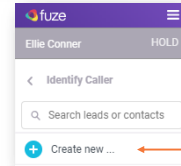
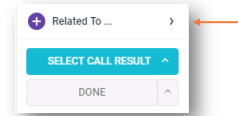
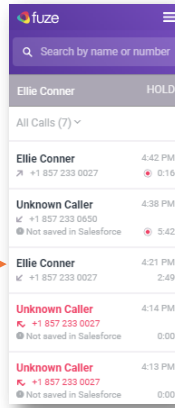
- Select an Unknown Caller from the Call Log
- Click the  button
- Select **Create new...**
- Select the  New lead button
- Fill in all applicable fields and then click the **Save** button



Adding a New Opportunity

Fuze for Salesforce allows a user to add a new opportunity to Salesforce directly within the connector.



- Select a contact from the Call Log
- Click the  button
- Select **Create new...**
- Click the  button
- Fill in all applicable fields and then click the **Save** button

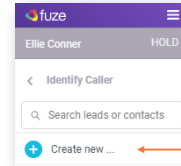
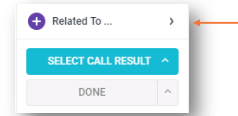
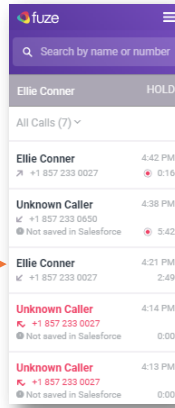


To link to an existing Opportunity, click on the **Search** field, type in the Opportunity number, then press Enter.

Adding a New Case

Fuze for Salesforce allows a user to link an open Call Log to a Salesforce Case directly from the connector.

- Select a contact from the Call Log
- Click the  button
- Select **Create new...**
- Click the  button
- Fill in all applicable fields and then click the **Save** button



To link to an existing Case, click on the **Search** field, type in the Case number, then press Enter.

Training Objectives

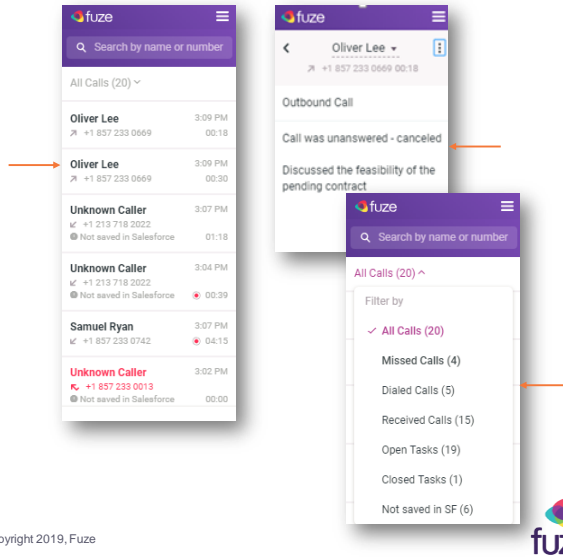
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Accessing the Call Log

A Call Log is used to track and document the interactions with a customer during a call.

- Click the name or number in the Call Log to view additional caller information
- Click the filter dropdown to select which type of calls to view



Call logs are useful for noting the reason for the call, conversation notes, and tracking action items. The call log is stored as an activity record within Salesforce.

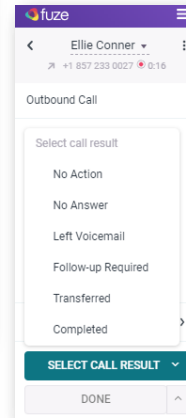
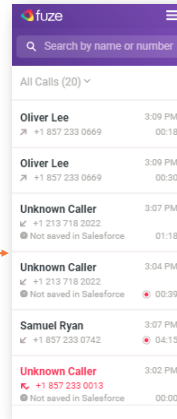
Selecting a Call Result

Fuze for Salesforce allows a user to add a call result directly within the connector, which will appear in the Activity history under Accounts in Salesforce.


- Click the name or number in the Call Log
- Click the **SELECT CALL RESULT** button
- Select the appropriate call result from the available options
- Click **DONE** to assign the call result

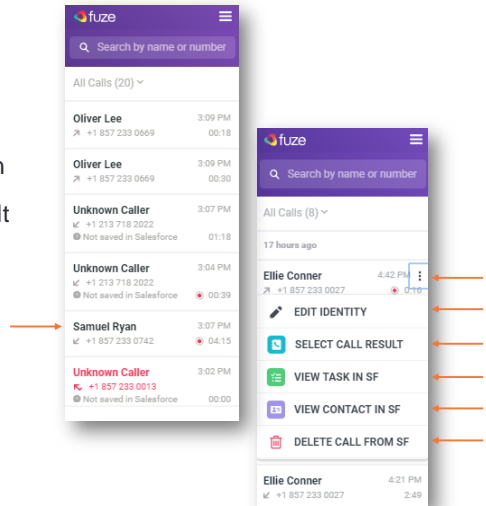


If **DONE** is selected without choosing a call result, the call remains Open.



Managing Call Records

- Hover over the name or number in the Call Log
- Click the  button
- Click **EDIT IDENTITY** to edit the contact information
- Click **SELECT CALL RESULT** to assign a call result
- Click **VIEW TASK IN SF** to be taken to the Task record in Salesforce
- Click **VIEW CONTACT IN SF** to be taken to the Contact record in Salesforce
- Click **DELETE CALL FROM SF** to delete the Call record from Salesforce



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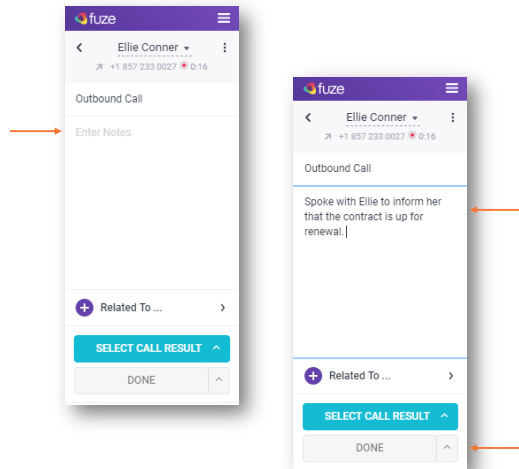
To unhide a contact, search for and click the contact's name.

Once a call has been deleted from Salesforce, it will be stored locally (within the browser database) for 24 hours in case access to the call is needed within that time period.

Adding Notes

Fuze for Salesforce allows a user to add a note within the connector, which will appear in the Activity history under Contacts in Salesforce.


- Click within the **Enter Notes** field
- Enter notes
- Click **DONE**

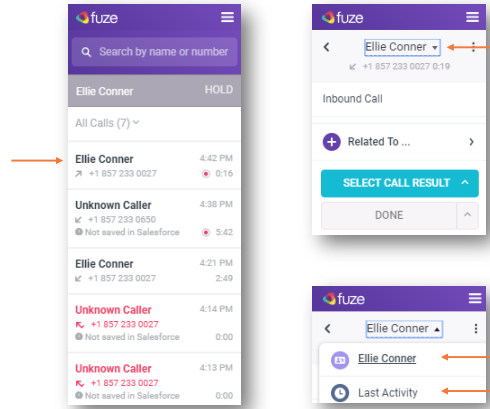


There is the ability to select the arrow next to the **DONE** button, which will offer the option to select **Done + open Task** or **Done + open Contact** both of which will open the appropriate panel in Salesforce.

Viewing Objects by Account or Contact

Fuze for Salesforce allows a user to view account or contact information for a caller.

- Select a contact from the call log
- Click the dropdown arrow next to the contact's name
- Click the contact's name to be taken to the Contact area of Salesforce
- Click the  button to view the last activity for the contact



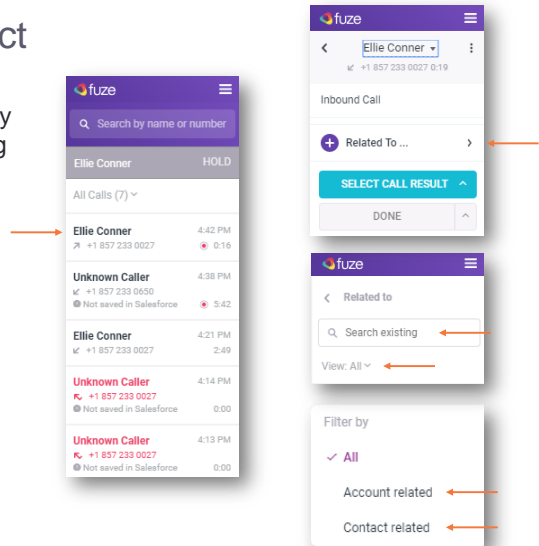
Account-related details are displayed by default, however a user may select contact-related results in the filter that appears at the top of the list to view Opportunities.

The filter selection for Opportunities, by Account or Contact, persists for subsequent calls.

Searching by Account or Contact

Fuze for Salesforce allows a user to filter results by account related or contact related, when searching for opportunities and cases to link to a call.

- Select a contact from the call log
- Click the **Related To ...** button
- Click **Search existing** to filter the search by keyword
- Click the **View All** dropdown arrow
- Click **Account related** to view information by account
- Click **Contact related** to view information by contact



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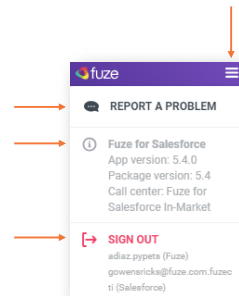
By default, the Search screen is pre-populated with account related results. Hence, this allows the user to easily find the Opportunity or Case. Clicking on the ellipsis will allow the user to view the information in Salesforce.

When searching for Opportunities and Cases to link to a call, the matching text in the search results will be in bold, which helps to easily identify matching text in the search results. The minimum keyword length to search is two characters

Accessing Help and Signing Out

The Help feature allows a user to interact with Fuze or view application information.

- Click the ☰ icon
 - Choose **REPORT A PROBLEM** to access the Feedback form
 - View application information
 - Select **SIGN OUT** to close out of Fuze for Salesforce



Once the Feedback form has been filled out, the user may click **SEND FEEDBACK** to submit the form directly to Fuze. In the **What's going on?** dropdown, the following categories are available:

- Call Hold/Transfer/End
- Call Log/Activity Record
- Caller Matching
- Click-to-Call
- Inbound Call
- Link to Related Record
- Other

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Knowledge Check

1. Fuze for Salesforce is an application that runs outside of Salesforce. True or False? **False**
2. Click-to-Call enables the user to place a phone call by clicking on a phone number within Fuze for Salesforce. True or False? **True**
3. Fuze for Salesforce will automatically link calls initiated via Click-to-Call. True or False? **True**
4. An incoming call can be declined directly from Fuze for Salesforce. True or False? **True**
5. The Call Log is used to track and document interactions with a customer during a call. True or False? **True**
6. A Call Log can only be linked to an opportunity. True or False? **False**
7. The Fuze for Salesforce home screen lists inbound and outbound calls from the past 24 hours. True or False? **True**



Thank You!