User Guide

Fuze Connect for ServiceNow

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Introduction

Fuze Connect is a desktop application which automatically looks up ServiceNow data during a call, to give you the information you need about the caller at a glance.

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Getting Started

Fuze Connect is offered as a desktop application. To install Fuze Connect on your computer, you can download the executable from Fuze servers.

1. Open your web browser and navigate to the Fuze Connect download link:

    ● https://fuzeconnect.gts.fuze.com/

Your browser should automatically download the Mac or Windows installer that is specific to your platform.

2. Open the downloaded Fuze Connect installer, and follow the installation instructions.

Initial Setup

Perform the following actions to set up Fuze Connect with ServiceNow

-   Once installation is complete, you may start Fuze Connect.
-   On first run, you will need to log in to your Fuze account.
-   On this screen, enter your **Fuze Username** and click **Next**.
-   Depending on your account settings, you will either be prompted for your **Fuze Password**, or redirected to your **authentication provider** to complete your login.
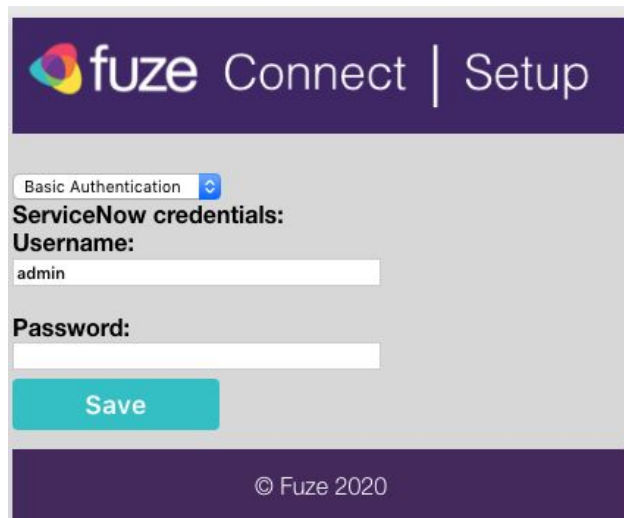
Authorizing ServiceNow

Once you log in with your Fuze account, additional authentication will be required to complete the connection between Fuze and ServiceNow.

If you receive the following message, you must authorize your connected ServiceNow integration before you can use Fuze Connect:
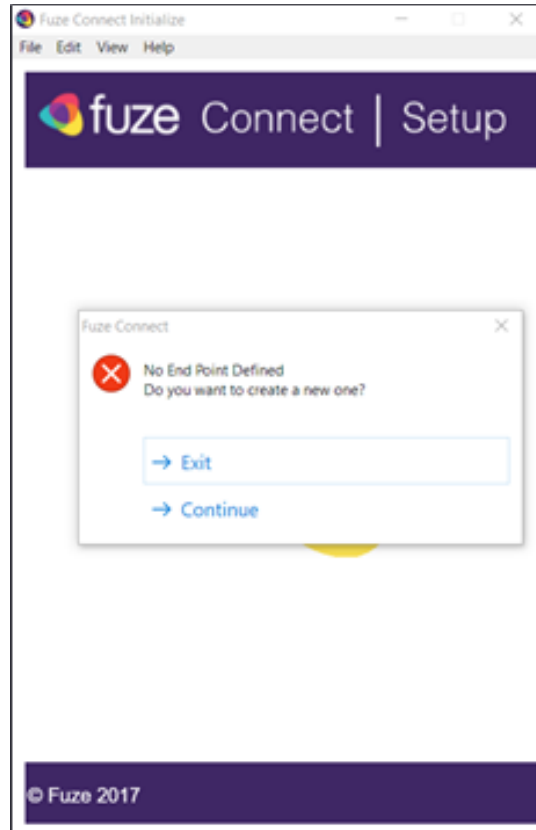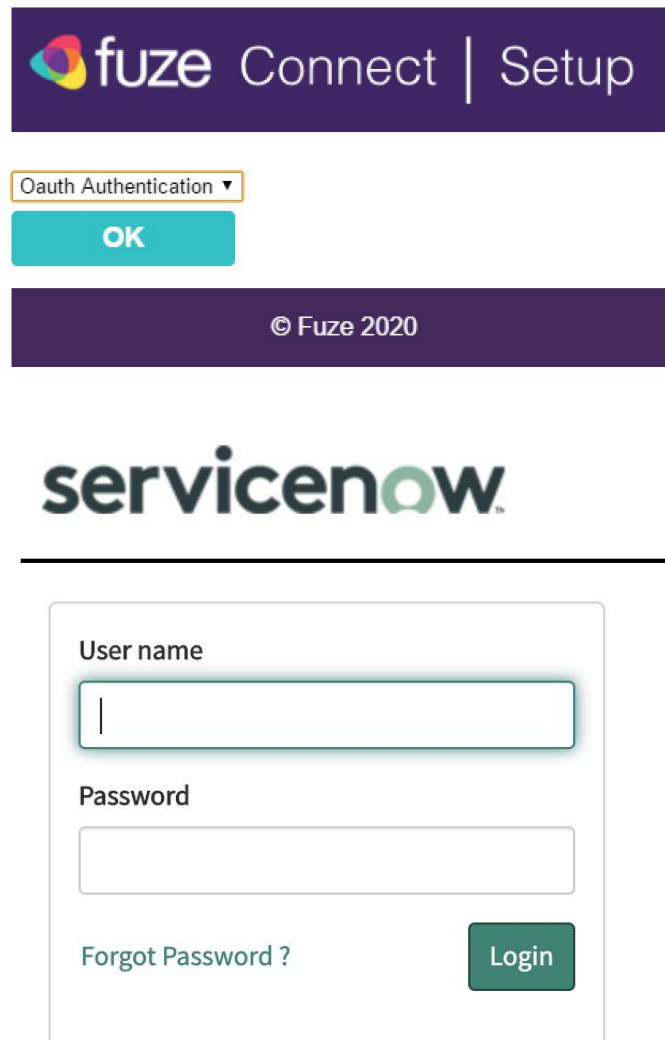
1.   Click **Continue** to proceed to the next prompt

1.1   On this screen you can enter your ServiceNow username/password to authenticate and press Save.

1.2   You can also change the authentication method to Oauth and press OK so you can authorize the application logging in to ServiceNow on your default browser.


1.2.1   If necessary, log in to your ServiceNow. In some cases a screen asking for authorization for Fuze Connect to be able to access ServiceNow may appear and user should accept it.

2.   After the username/password is validated by Fuze Connect or after the Oauth2 process is finished a Fuze Connect landing page will appear on the browser.

Once Fuze Connect has been authorized with your ServiceNow instance, you can begin using Fuze Connect right away.

Idle Screen

While you are not on a call, Fuze Connect will display the following Idle Screen:
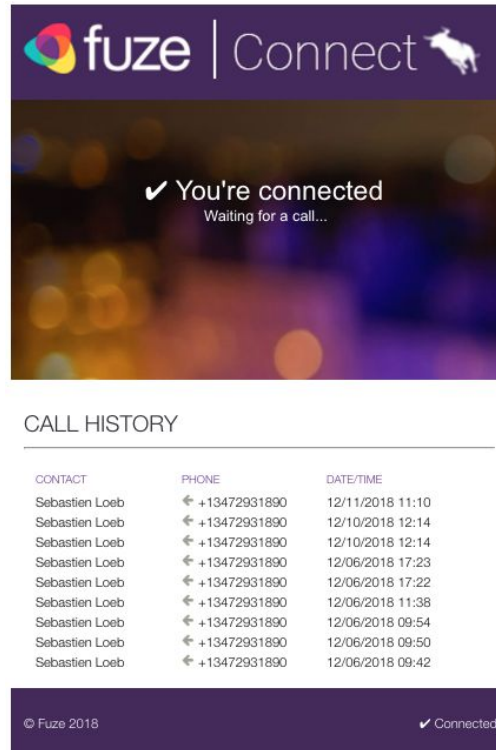
Fuze Connect Idle Screen

The idle screen shows the connection status of Fuze Connect.

Below the status text and image is the Call History, which shows all calls made or received while Fuze Connect was open and active.

- A **left arrow** indicates an **Inbound Call**.

- A **right arrow** indicates an **Outbound Call**.

Clicking on a record in the Call History will dial that contact at the number shown.
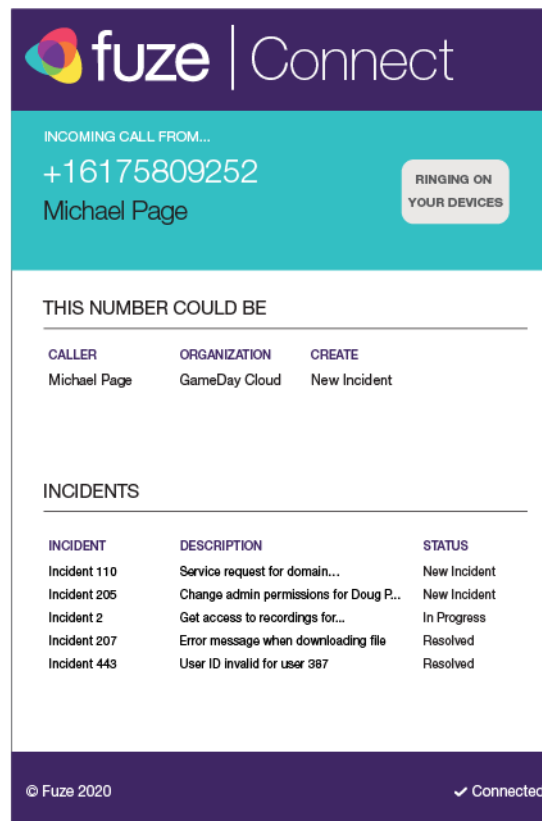
Inbound / Outbound Calls

On an incoming or outgoing call, the Connector will present relevant information by performing a lookup in your connected ServiceNow environment based on the caller's phone number and Caller ID.

Once the lookup is complete, a table will be displayed which shows relevant data.

Fuze Connect will attempt to match the phone number to any accounts in the connected ServiceNow environment.

Contacts will be searched matching the phone number and if it will be displayed in the primary area if found. When there is a Contact Match, the integration will display related Incidents

Incoming call info

On-Call Actions

The following actions can be performed on the associated data in Fuze Connect while on a call:

- Click on the **Caller Name** to open that contact in your connected ServiceNow.

- Click on the **Incident** listing to automatically open that record in your connected ServiceNow.

- Click on the **New Incident** link creates a new incident on ServiceNow and pops it on the browser.

Call Notes and Wrap-Up

When the call ends, a Notes window will be opened for the user to be able to add call notes related to the incident that the user has clicked or created and select a Wrap-Up code.

Call notes will also include a link to the associated call recording link. NOTE: Call recordings are stored on the Fuze platform for a defined amount of time, currently 60 days. If a user clicks on a call link for a call that is older than this defined time, they will receive an error or notification that the link is expired.

Call Wrap-Up Window, displayed after each call if enabled

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