



User Guide

Fuze Connect for Salesforce

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Introduction

Fuze Connect is a desktop application which automatically looks up Salesforce 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 Salesforce

- 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 User ID** 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.



Welcome

Enter your username or e-mail to sign in

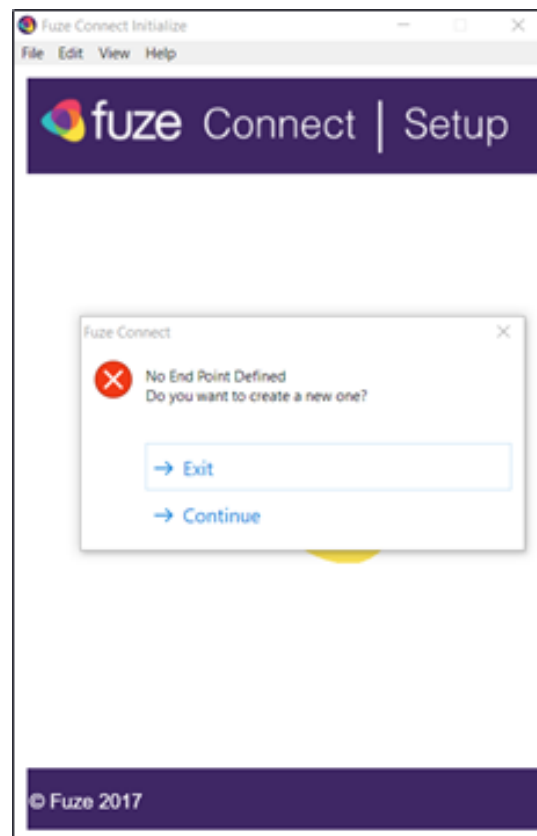
NEXT

Forgot your [username](#) or [password](#)?

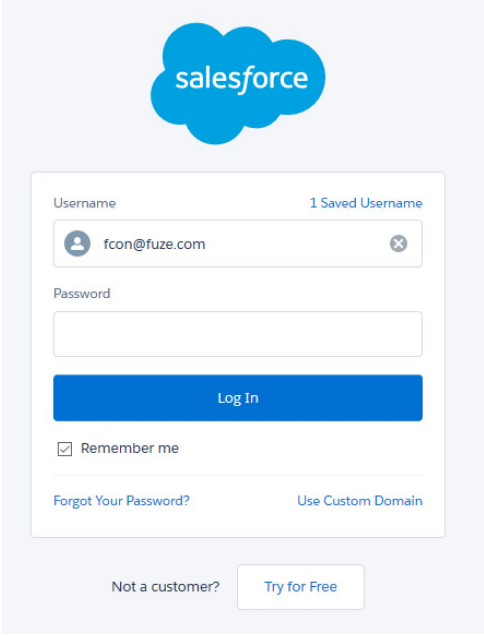
Authorizing Salesforce

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

If you receive the following message, you must authorize your connected Salesforce integration before you can use Fuze Connect:



1. Click **Continue** to be redirected to your Salesforce



The image shows a Salesforce login interface. At the top is the Salesforce logo. Below it is a login form with the following elements:

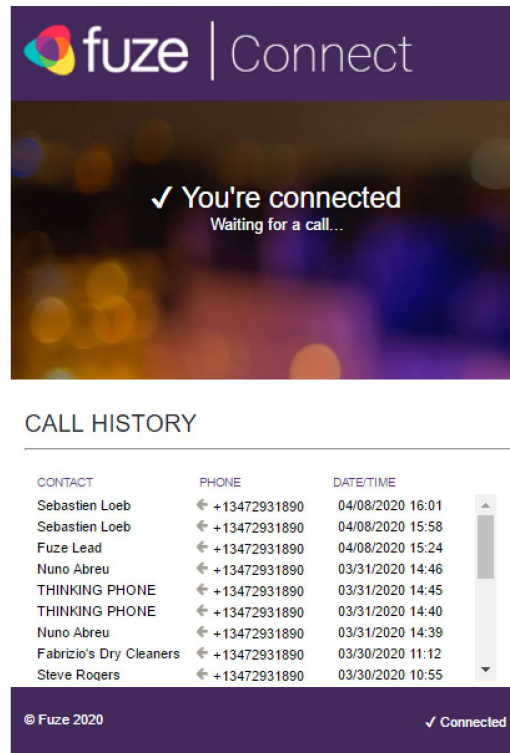
- Username:** A text input field containing "fcon@fuze.com" with a "1 Saved Username" label and a clear button (X).
- Password:** A text input field.
- Log In:** A blue button.
- Remember me:** A checked checkbox.
- Forgot Your Password?:** A link.
- Use Custom Domain:** A link.
- Not a customer?:** A link.
- Try for Free:** A button.

2. If necessary, log in to your Salesforce. In some cases a screen asking for authorization for Fuze Connect to be able to access Salesforce may appear and user should accept it. After the OAuth2 process is finished a Fuze Connect landing page will appear on the browser.

Once Fuze Connect has been authorized with your Salesforce 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.

Calls initiated in this way will be made using your preferred Click to Call device, as configured in the Fuze Customer Portal.

Inbound / Outbound Calls

On an incoming or outgoing call, the Connector will present relevant information by performing a lookup in your connected Salesforce 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 contact/leads/accounts in the connected Salesforce environment.

Entities matched will be displayed in the primary area if found. When there is a match, the integration will display related opportunities when available.



The screenshot displays the Fuze Connect interface. At the top, the Fuze logo and 'Connect' are shown. Below this, a teal box indicates the caller's information: 'CONNECTED TO ... +13472931890 Michael Page'. Underneath, a section titled 'THIS NUMBER COULD BE' contains a table with columns for CALLER, ORGANIZATION, and CREATE. The data row shows 'Michael Page', 'Fuze Solution Engineering', and 'New Opportunity...'. Below that, an 'OPPORTUNITIES' section contains a table with columns for STAGE, NAME, MRR, and CLOSE DATE. The data rows are: 'Discovery', 'Fuze Connect licen...', '1500', '2020-02-19'; and 'Discovery', '2020-02-25 15:45:5...', '0', '2020-02-25'. At the bottom of the interface, there is a dark purple bar with '© Fuze 2020' on the left and '✓ Connected' on the right.

CALLER	ORGANIZATION	CREATE
Michael Page	Fuze Solution Engineering	New Opportunity...

STAGE	NAME	MRR	CLOSE DATE
Discovery	Fuze Connect licen...	1500	2020-02-19
Discovery	2020-02-25 15:45:5...	0	2020-02-25

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/lead/account in your connected Salesforce.
- Click on the **Opportunity** listing to automatically open that record in your connected Salesforce.
- Click on the **New Opportunity** link to create a new opportunity associated to the contact/account and open it on a new window on Salesforce.

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 contact/lead/account of the call and select a Wrap-Up code. If an opportunity or a new opportunity link is clicked, then the phone call entry is also associated with that opportunity.

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.



fuze Call Wrap-Up

Select a Wrap Up Code: **Miguel Oliveira**
Fuze Meeting  **2018-11-20 16:46:02**

Call Notes:
Need to set a meeting with Miguel for next week!

Save

© Fuze 2018

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

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