COMCAST BUSINESS VOICEEDGE™ INTEGRATION FOR SALESFORCE.COM

USING THE COMCAST BUSINESS VOICEEDGE INTEGRATION FOR SALESFORCE.COM

This application brings you the ability to make a call right from your computer. A desktop phone dialer is added directly to your Salesforce.com application.

- Increase your efficiency by making, ending, and transferring calls from SalesForce.com.
- Manage business contacts by adding or editing contact information while you talk.
- Improve customer interactions by adding notes to a customer contact while on a call.

Prerequisites

The Business VoiceEdge Integration for Salesforce.com requires the following:

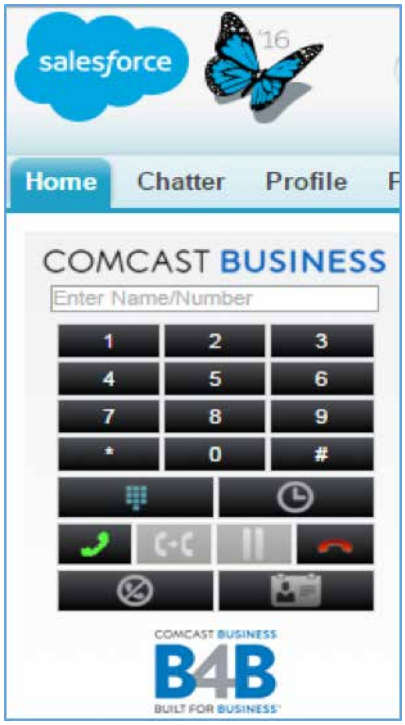
- A Salesforce.com account. If you do not have an account, please contact your Salesforce.com support team to inquire about a license.
- A Business VoiceEdge Integration for Salesforce.com app installed into your Salesforce.com application.
  - Installation instructions are provided after completing the purchase process on Comcast Business Cloud Solutions: https://upware.comcast.com.
- A **Business VoiceEdge Unified Communications seat** with a phone number.
- Username and password for your Business VoiceEdge Portal account.
  - If you do not have log in information, please contact Business VoiceEdge Support at 888-426-6014.
- Google Chrome Version 32.0 or higher. Other browsers (like Firefox or Internet Explorer) may give varying results.

Logging into the Business VoiceEdge Integration for Salesforce.com

1. Log into your Salesforce.com account and open the **Home** page by clicking on the Home tab. The application is located at the top of the left hand sidebar of your Salesforce.com Home page.

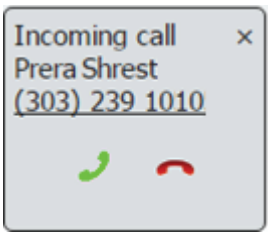
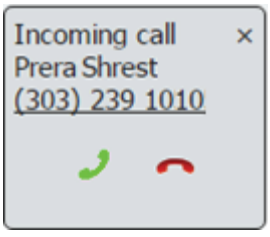
COMCAST BUSINESS

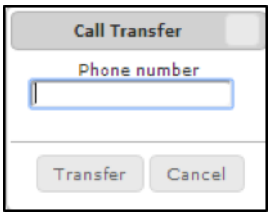
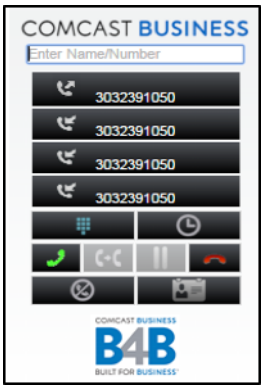
2. To log into the application, enter the following information:
   a. **User ID:** Your **Business VoiceEdge Portal** User ID
   b. **Password:** Your **Business VoiceEdge Portal** password

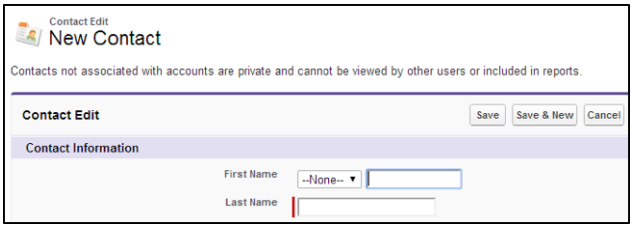
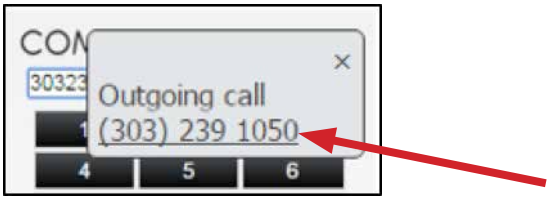
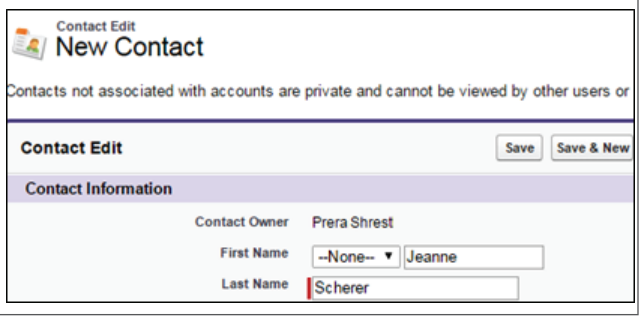


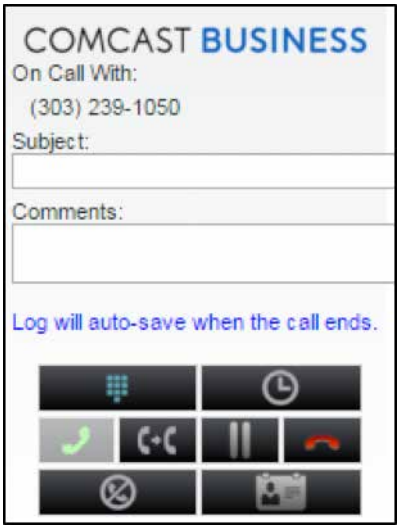
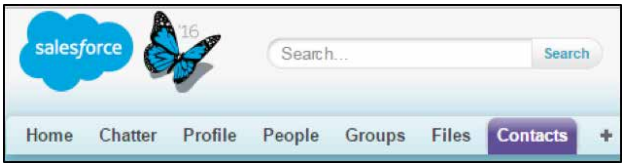
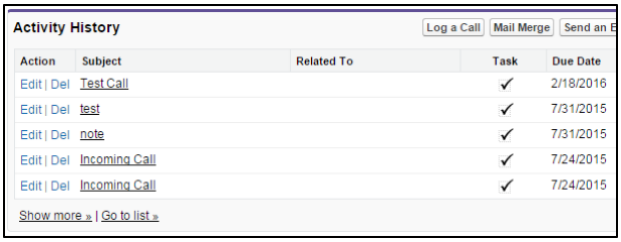
Using the Business VoiceEdge Integration for Salesforce.com

The following table describes the features that are available in the application:

Feature	Steps	Icon
Make a Phone Call	1. In the text box above the keypad, you can type a number, copy/paste a number, or type a name to find a contact or use the keypad to enter the phone number. 2. Click the **Green Phone** icon to initiate the call.	
Answer a Phone Call	1. Click the **Green Phone** icon to answer an incoming call. A notification pop-up will be displayed to identify the incoming caller. The phone icon changes color to indicate you are on a call.	
Reject a Phone Call	1. Click the **Red Phone** icon to send an incoming call directly to voicemail. A notification pop-up will be displayed to identify the incoming caller.	

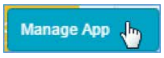
End a Phone Call	1. Click the **Red Phone** icon to end a call. The Application displays the name and number of the current call until the call ends.	
Transfer a Phone Call	1. Select the **Call Transfer** icon to move the call to another number. 2. The **Call Transfer** pop up is displayed. 3. Type the phone number or extension to which the call should be moved, and select **Transfer**. Select Cancel to cancel the call transfer.	 
Place a Call On Hold	1. Select the **On Hold** icon to place a call on hold. 2. The **On Hold** icon turns red to indicate a call is on hold. 3. Select the same **On Hold** icon to release call from hold.	
Place a Phone on Do Not Disturb	1. Select the **Do Not Disturb** icon to send all calls to voicemail. 2. The **Do Not Disturb** icon turns blue when it is on. 3. The **Do Not Disturb** function can be turned on or off either from the salesforce app or from the phone itself.	
Show/Hide Dial pad	1. Select the show/hide dial pad icon to show or hide the dial pad	
Show/Hide Call History	1. Call History can be displayed and hidden by clicking on show/hide call history button.	 

Managing Contacts	Steps	Icon/Screenshot
Create a Contact	1. Select the **Contact** icon. 2. The **New Contact** screen is displayed. You can add contact information to the contact before saving it.	 
Create a Contact During a Call	1. During an incoming or outgoing call, select the hyperlink on the phone number.	
	2. The **Contact** screen is displayed. Any known information is automatically added into the **Contact Information**. You can add additional information to the contact before saving it.	

Comments Log	Steps	Screenshot
Saving Comments Log	1. During an incoming or outgoing call once the call is answered, “On Call With” information displays the caller information like name and or phone number, depending on whether the contact information is already saved or not.	
	2. Entered Subject and Comments log are auto saved in contacts when the call ends. Comment log can be retrieved by going to Contacts > View all contacts > Select hyperlinked name related to the call > Go to activity history to see the comments log.	 

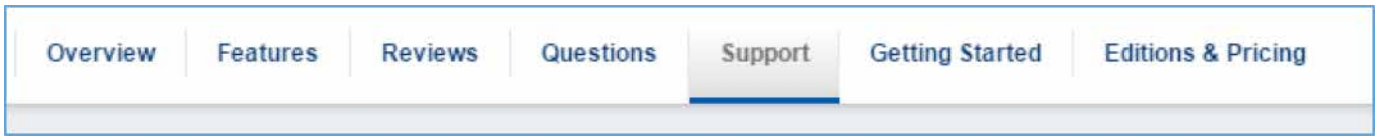
Support

1. Within the Cloud Solutions website navigate to the **My Apps**.

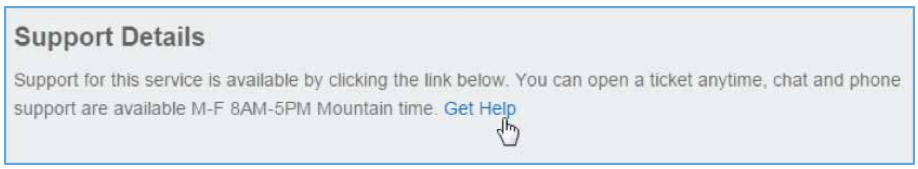
2. Hover over the Salesforce.com Integration app to view the **Manage App icon**.
3. Select **Manage App**. 

4. Select G**o to Product Profile**.

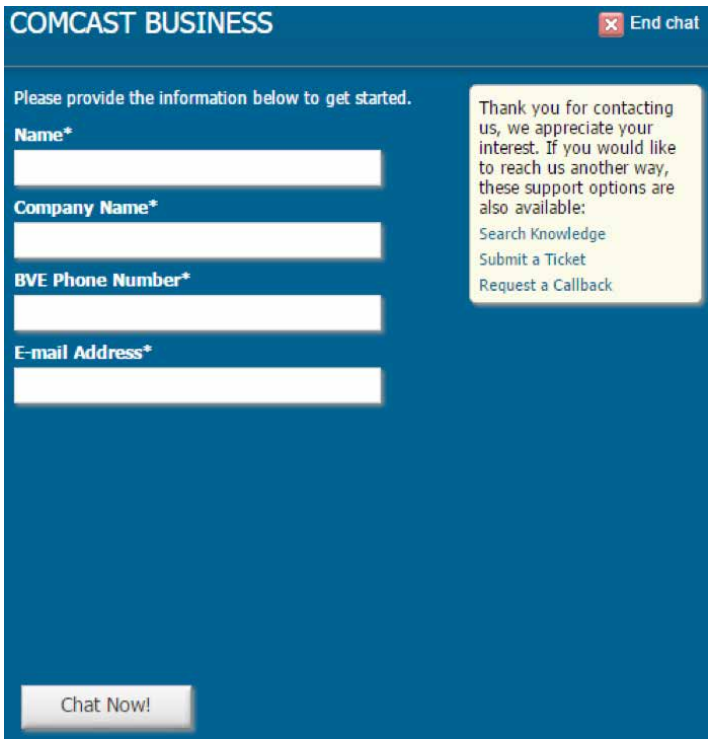
5. Navigate to the **Support** tab.



6. Click Get Help hyperlink.



Result: During business hours, a page will be displayed to allow you to initiate a chat session, submit a ticket, or request a callback. After business hours, you will have the option to submit a ticket.



© 2016 Comcast. All rights reserved.