Administrator Guide

Fuze for Salesforce Configuration

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Introduction

This guide provides configuration, customization, and technical support details for Fuze for Salesforce. The information provided in this guide is not meant to outline a complete setup process, but rather to provide you with an overview of settings and options available for Fuze for Salesforce administration.

> **Some settings and steps described in this guide may differ or may not be available in pre-5.4 versions of Fuze for Salesforce.**

> **See the Fuze for Salesforce Installation guide on Fuze community for detailed installation steps and required files.**

For details about how to use Fuze for Salesforce, see the Fuze for Salesforce section of our help center.

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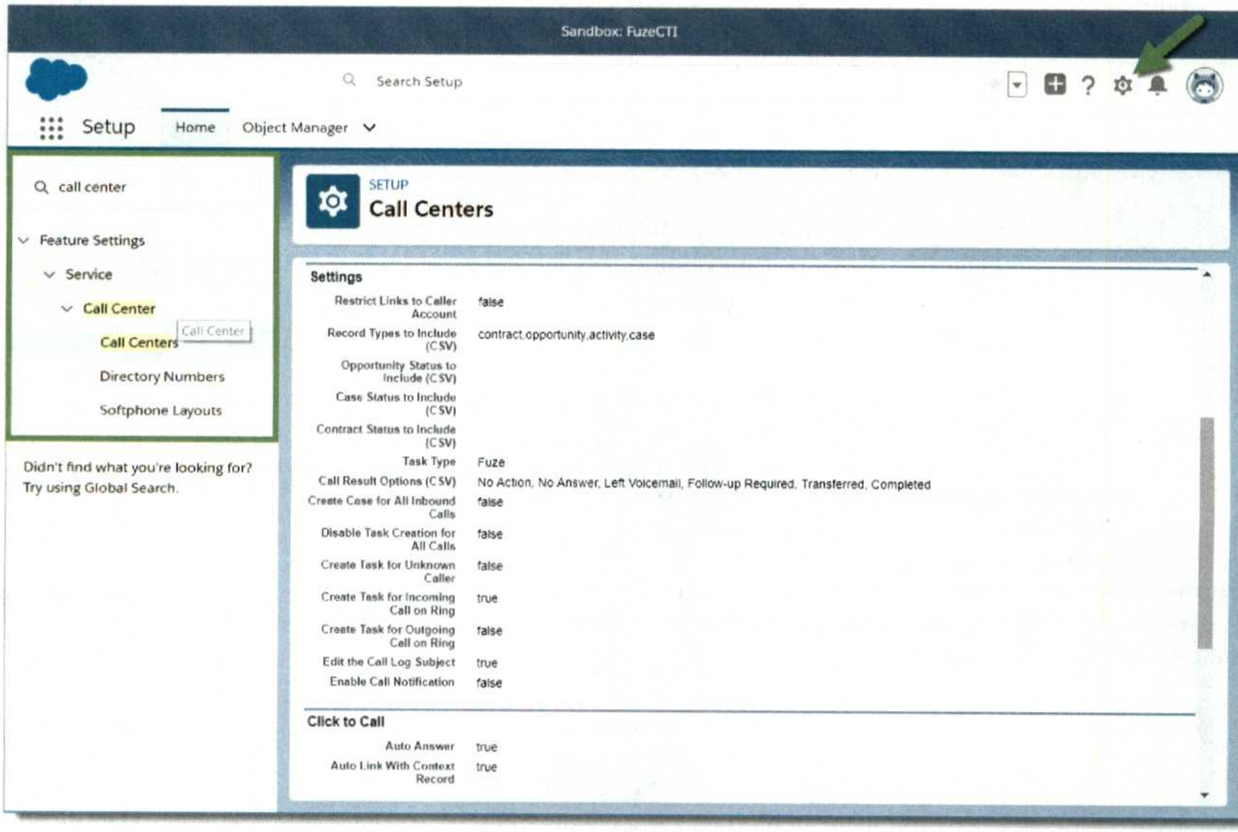
Fuze for Salesforce Settings

As a Salesforce administrator, you can configure Fuze for Salesforce settings from the following location in the Salesforce application: **Setup** > **Feature Settings** > **Service** > **Call Center**> **Call Centers** > **Fuze for Salesforce**.



The following table provides more detail about each of the settings that are available for Fuze for Salesforce.

Fuze for Salesforce Settings

Setting Name	Details	Default Value(s)
Restrict Links to Caller Account	By default, when an agent searches for an opportunity, contract, or case to which to link a call, Fuze for Salesforce restricts the search to the account of the caller. You can choose to un-restrict the search results by updating this setting value to **False**. When this setting is **False**, searches adhere to the values defined for **Opportunity/Case/Contract Types to Include (CSV)**, or if no values are configured for those settings, all results are returned.	**True**
Record Types to Include (CSV)	These are the record types that are included in the incoming call notification, and when searching for a record to link to a call. Supported record types are account, case, contract, and opportunity, all of which are listed by default. You can restrict to a smaller subset as needed.	**Contract, Opportunity, Account, Case**
Opportunity Types to Include (CSV)	This setting serves two purposes: • Defines the opportunity types that are included in the incoming call notification. If this field is left blank, no opportunity status is included. • If **Restrict Links to Caller Account** is **False**, only opportunities that match these values are returned when a user searches for an opportunity, contract, or case to link to a call. If no values are configured for this setting, all results are returned. • If there is no contact associated with the call, then all opportunities are searched since there is no account to filter against.	**Prospecting,Qualification,Proposal/Price Quote,Value Proposition,Closed Lost,Closed Won,Id. Decision Makers,Needs Analysis,Negotiation/Review,Perception Analysis** **Note:** Your Salesforce instance values may different from these.

Fuze for Salesforce Settings		
Setting Name	**Details**	**Default Value(s)**
Case Types to Include	The case types that are included in the incoming call notification, and searching records to link to the call. If this setting is blank, no case statuses are included.	**New,Escalated,Working**
Contract Status to Include (CSV)	These are the contract statuses that are included in the incoming call notification, and searching records to link to the call. If this setting is blank then no contract status is included.	**Draft,In Approval Process,Activated**
Task Type	The value of this setting is used to populate the **Type** field on the **Task** object created in Salesforce by the Fuze app for each call. If your organization has triggers and/or workflows that are dependent on the value of the **Type** field on the **Task** object to be set to **Call**, after updating the call center to version 5.1.1, you should manually update the value from **Fuze** to **Call** to maintain previous behavior.	**"Fuze"**
Call Result Options (CSV)	This setting determines the wrap-up codes that an agent can choose from when finishing a call.	**Call successful,Follow-up required,Left voicemail,No answer,Transferred**
Create case for all inbound calls	By default, Fuze for Salesforce automatically creates a task (call log) for each answered incoming call (as determined by the value of **Create Task for incoming call on Ring**). Fuze does not automatically create a related Salesforce case, but the agent can link to an existing case from the call log. Set this option to True if you want Fuze to automatically create a new call log and related Salesforce case for each answered incoming call	**False**

Fuze for Salesforce Settings		
Setting Name	**Details**	**Default Value(s)**
Disable task creation for all calls	When **True**, task creation for all agents in the call center is disabled. **Fuze** recommends this setting always remains **False.** If you have a reason to set this setting to **True**, contact your Fuze representative.	**False**
Create Task for Unknown Caller	If you want your agents to be able to create tasks for unknown callers without an identified contact or lead, update this setting value to **True**.	**False**
Create Task for incoming call on Ring	When **True**, a new task is automatically created for each incoming call, even if your agent does not answer the call.	**True**
Create Task for outgoing call on Ring	When **True**, a new call log is created for each outgoing call, even if the call is not answered on the other end of the call.	**False**
Edit the Call Log Subject	When **True**, users can change the subject of a call log.	**True**
Enable Call Notification	When **True**, a browser screen-pop is displayed on the user's screen for each incoming call.	**False**

Call Center Settings		
Setting Name	**Details**	**Default Value(s)**
Auto Answer	The Auto Answer setting allows you to turn on auto-answer on the callback device for your users. The default value for this setting is **False** (disabled). The callback device itself must also be configured to accept auto answer requests. For information on turning on auto-answer on your device, contact your Fuze representative.	**False**
Auto Link With Current Page Record	When **True**, incoming calls are automatically linked with the current record page open in Salesforce, such as an opportunity or a case. This allows for intelligent linking when agents initiate a call from within the record page..	**True**

Add optional activity record fields for reporting on queues

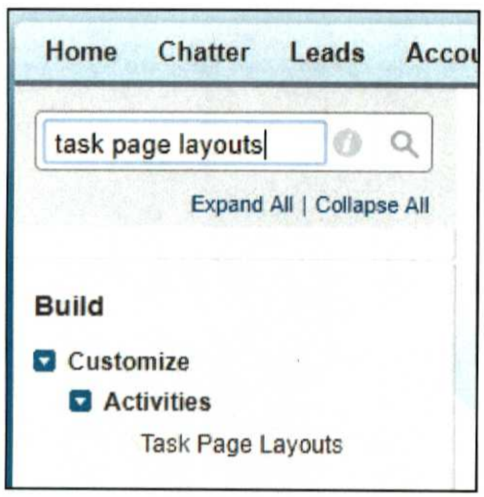
You can add the following fields to the page layouts for activity records:

- **Wait Time -** The amount of time (in seconds) that a caller has been waiting in a queue.
- **Number Called -** The phone number that the caller called.
- **Call Duration -** The amount of time (in seconds) from when an agent answered the call, to when the call ends.

After you add these fields, you can then generate reports that will help you evaluate the call metrics of your agents.

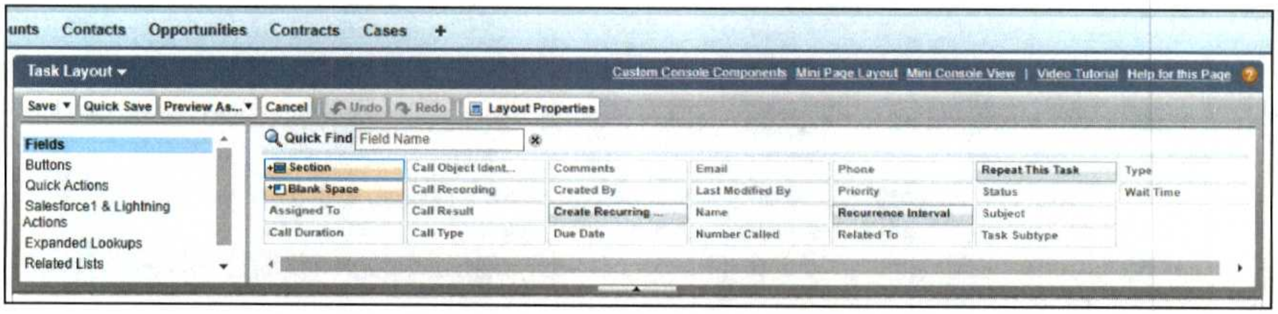
1. From within Salesforce, at the top of the page, click **Setup**.

2. In the left margin, click **Build** → **Customize** → **Activities** → **Task Page Layouts**.

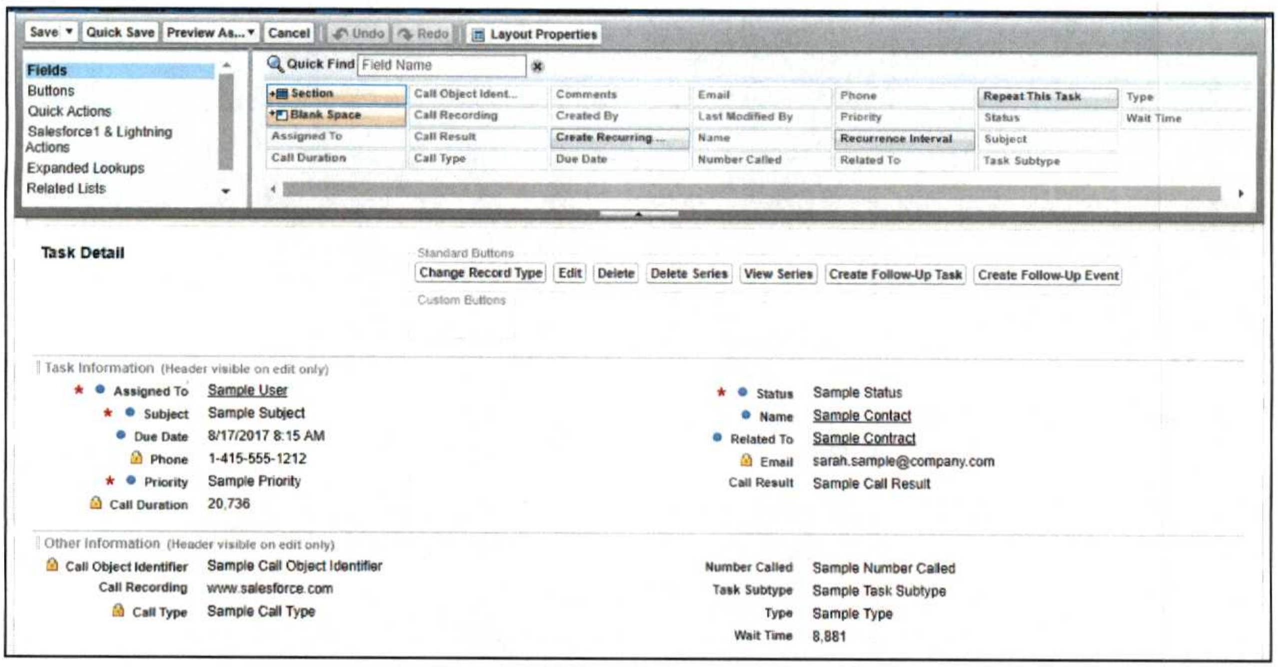


3. Next to the page layout that you want to add the fields, click **Edit**.

4. In the **Task Layout** section, click **Fields**.



5. Drag and drop any or all of the fields (**Wait Time**, **Number Called**, **Call Duration**) to the Task Detail section of the page layout.



6. Click **Save** in the **Task Layout** section.

Configuring Click-to-call

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

When you click a number, the device that you configure as your **preferred click-to-call device** begins to ring. When you answer, the call begins to ring at the other end.

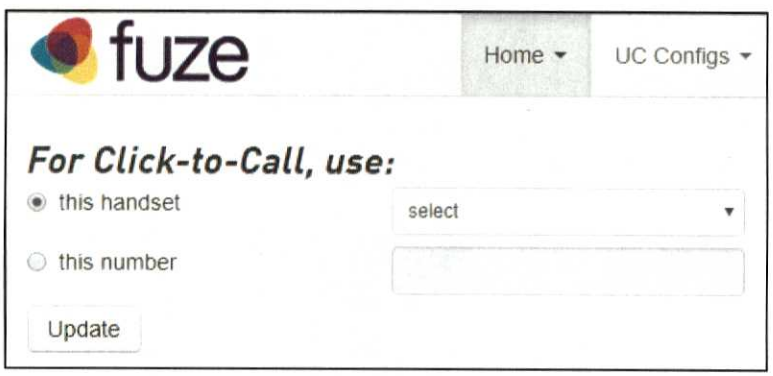
You can choose any of your Fuze devices (desk phone, Fuze Desktop, or Fuze Mobile) or another device, such as your home phone as your **preferred click-to-call device**.

Choosing Your Preferred Click-to-Call Device

1. Log in to the Fuze Customer Portal here: https://portal.thinkingphones.com.

2. Click **Home** > **Click-to-Call**.

3. Select **this handset** or **this number**.



- If you select **this handset**, choose the device that you want Click-to-Call to use (such as your desk phone, Fuze Desktop client, or Fuze Mobile application) from the drop-down menu.
- If you select **this number**, type the full phone number that you want Click-to-Call to use.

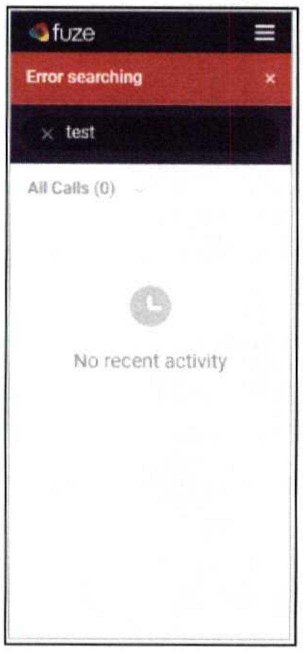
4. Click **Update**. Your Click-to-Call configuration is saved.

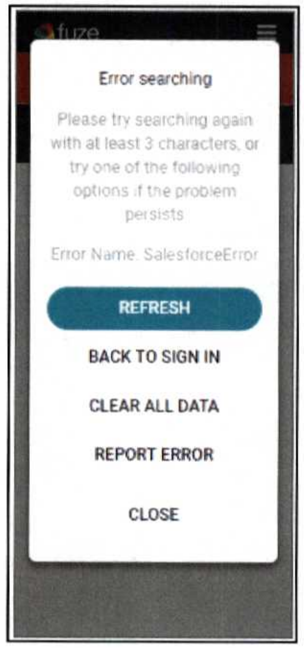
Technical Support

Permission Errors

If a user experiences an error when performing normal actions in *Fuze for Salesforce*, these may be caused by required Salesforce permissions missing from the user profile.

The following screenshots show a search error caused by missing user permissions.





Clicking on the red banner shows error information, and clicking on the error name unveils the **cause of the error**. When a user does not have the proper permissions to a given field, this message will appear on the error details (In this case, the user is missing permission to read/write **Contact.title**):

```
INVALID_FIELD -
Contact(id, phone, firstName, lastName, title, account.id)
                                        ^

ERROR at Row:1:Column:138
No such column 'title' on entity 'Contact'. If you are attempting to use a
custom field, be sure to append the '__c' after the custom field name. Please
reference your WSDL or the describe call for the appropriate names.
```

Field level security can be configured in Salesforce by following these steps:
https://help.salesforce.com/articleView?id=admin_fls.htm

Features that can cause permission errors

The following is a list of *Fuze for Salesforce* features that place requests to Salesforce.

Fuze for Salesforce Action	Salesforce requests
Global search	find for contacts, leads and accounts
Receiving a call (when it creates the call log)	create task (and optionally a case)
Contact search on contact selector	find for contacts and leads
Record search on link record	find for opportunities, contracts, cases, accounts
Set a linked record / create record	update task create opportunities, contracts, cases, accounts
Updating the call log data	update task
Open contact/lead summary	get contact/lead/activity information
Sync task data (when opening any call)	get task

Permissions Table

The following Salesforce permissions are required by users of Fuze for Salesforce.

Object	Field name	Field id	Type
Account	Account Name	name	read/write
	Phone	phone	
Case	Account Name	accountId	read/write
	Case Number	caseNumber	
	Case Owner	ownerId,	
	Contact Name	contactId	
	Date/Time Closed	isClosed	
	Status	status	
	Subject	subject	
Contact	Account Name	accountId	read/write
	Name	firstName, lastName	
	Phone	phone	
	Title	title	
Contract	Account Name	accountId	read/write
	Contract End Date	endDate	
	Contract Number	contractNumber	
	Contract Start Date	startDate	
	Contract Term (months)	contractTerm	
	Description	description	
	Special Terms	specialTerms	
	Status	status	

Object	Field name	Field id	Type
Lead	Company	company	read/write
	Name	firstName, lastName	
	Phone	phone	
	Title	title	
Opportunity	Account Name	accountId	read/write
	Amount	amount	
	Close Date	closeDate, isClosed	
Task	Account Name	accountId	read/write
	Assigned To	whoId	
	Call Recording	tpnincsf__TPN_Call_Recording__c	
	Call Result	callDisposition	
	Call Type	callType	
	Description	description	
	Due Date	activityDate, isClosed	
	Number Called	tpnincsf__Call_NumberCalled__c	
	Related To	whatId	
	Status	status	
	Subject	subject	
	Wait Time	tpnincsf__HoldTime__c	

Session Timeout

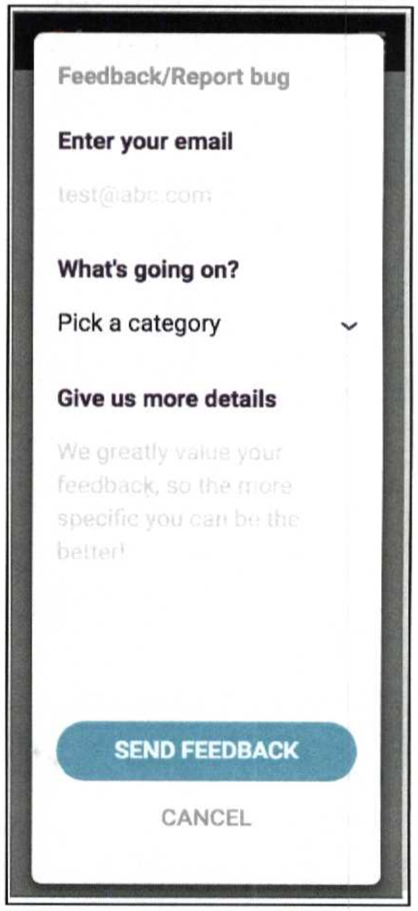
If your users are experiencing issues with Fuze for Salesforce timing out more frequently than desired, you can update the settings in Fuze for Salesforce's **Connected App → OAuth policy** to **Admin Approved → Users are pre-authorized**, and select the profiles for users who will be using this app. This drastically reduces app session timeouts and related errors. Note that with this configuration, profiles that are not pre-authorized will not have access to the *Fuze for Salesforce* app.

Fuze for Salesforce will auto-renew its token expiration as long as the Salesforce token session itself is still alive.

Sending Feedback and Reporting Bugs

To send feedback or report a problem directly from the application,

1. Click the **Menu button** and select **REPORT A PROBLEM.**
2. Fill out the **Feedback Form** (see image) and please be as detailed as possible.
3. Click **SEND FEEDBACK** to submit your feedback.



Contacting Fuze Support

Submit a case: https://fuzecommunity.force.com/support
Phone: 1.800.890.1553

Troubleshooting Tips

To clear Fuze for Salesforce cookies in Google Chrome, run the following URL in the user browser and select REMOVE ALL:

chrome://settings/cookies/detail?site=salesforce.fuze.com → REMOVE ALL

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