



Grandstream Networks, Inc.

UCM6xxx IP PBX Series

Salesforce CRM Integration Guide



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INTRODUCTION

Customer relationship management (CRM) is a set of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle, with the goal of improving business relationships with customers.

The UCM6XXX series support two CRM API, SugarCRM and Salesforce CRM, allowing users to get full information about their contacts, customers and leads, and save call information details to specific table history for further usage.

This guide contains a step-by-step configuration needed to set up Salesforce CRM with the UCM6XXX.

UCM6XXX CONFIGURATION

The UCM6XXX series allow the following features using Salesforce CRM:

- Querying
- Updating
- Adding CDR records through Salesforce APIs (SOAP or REST)

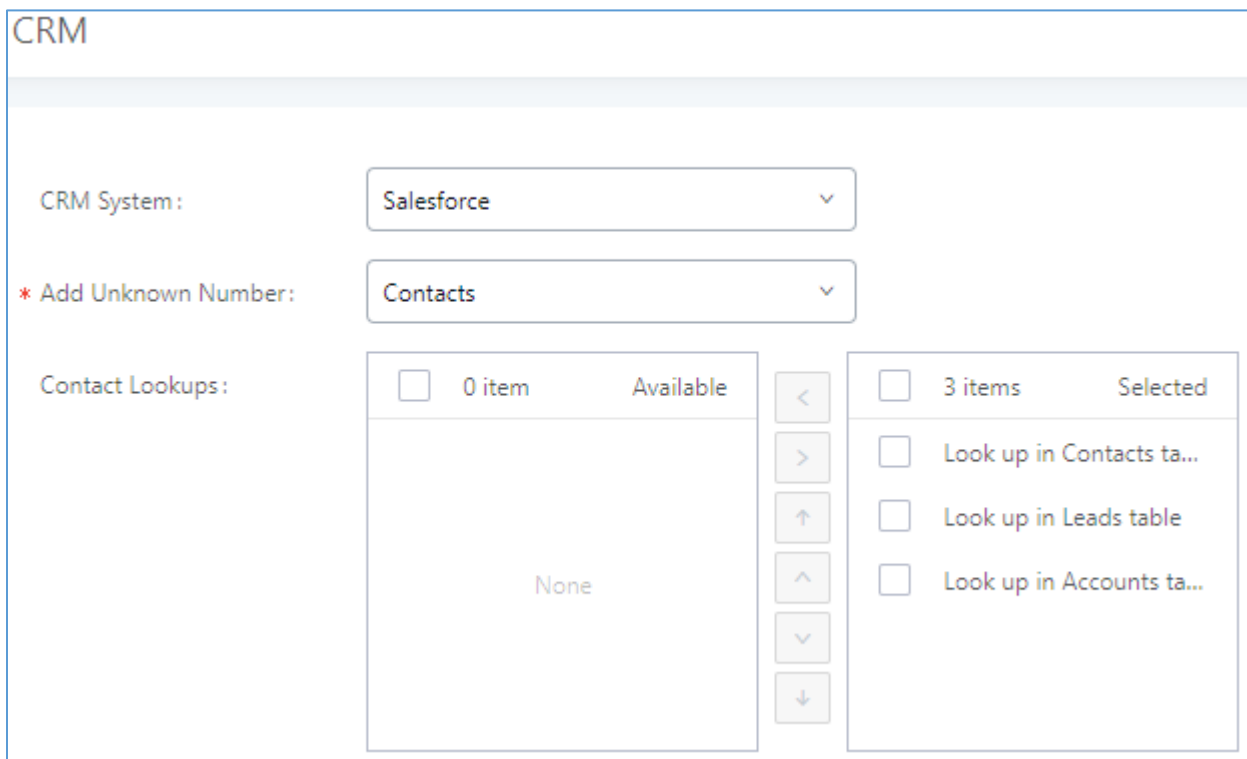
Two steps are required to configure UCM6xxx with Salesforce CRM:

1. **Admin Configuration.**
2. **User Configuration.**

Admin Configuration

This step is required to configure received calls, add contact phone number, Contact Lookups... These settings will apply to all users on this UCM6XXX using Salesforce CRM platform.

Salesforce configuration page can be accessed using admin login at “Web GUI→**Value-Added Features**→**CRM**”.



The screenshot shows the CRM configuration interface. It includes the following elements:


- CRM System:** A dropdown menu set to "Salesforce".
- * Add Unknown Number:** A dropdown menu set to "Contacts".
- Contact Lookups:** A selection interface with two panes. The left pane is labeled "0 item Available" and contains "None". The right pane is labeled "3 items Selected" and contains three options:
 - Look up in Contacts ta...
 - Look up in Leads table
 - Look up in Accounts ta...

Figure 1: Salesforce Settings

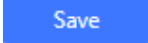

1. Select **Salesforce** from the “CRM System” dropdown list to use the Salesforce CRM and make similar configuration to the above, below are the details:



Table 1: Salesforce Settings

CRM System	Allows users to select a CRM system from the drop-down list, choose Salesforce to use Salesforce CRM.
Add Unknown Number	Allows to automatically save received calls from numbers not previously logged in Salesforce CRM and add contact phone number to specific table (Contacts, Leads...).
Contact Lookups	<p>Selects CRM tables that will be used to lookup for contact details when making/receiving calls.</p> <p>Press  to select where the UCM can perform the lookups on the CRM tables</p>

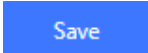
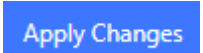
Once users finish configuring above settings using admin access:

2. Click on  and .
3. Logout from admin access.

User Configuration

This configuration is per user, it will allow users to authenticate and sync up with Salesforce CRM platform.

Note: Admin Configuration needs to be set before enabling CRM for users.

1. Access to the UCM web GUI as user and go to “User Portal→**Value-added Features**→**CRM User Settings**”.
2. Click on “**Enable CRM**”.
3. Enter the **username**, **password** and **Security Token** associated with your Salesforce CRM account.
4. Click on  and .

The status will change from “**Logged Out**” to “**Logged In**” and users can start using Salesforce CRM.



CRM User Settings

Save
Cancel

Enable CRM:

* Username:

* Password:

* Security Token:

Login Status: Logged In

Figure 2: CRM User Settings

Table 2: CRM user settings

Username	Enter Salesforce username to login.
Password	Enter Salesforce Password to login.
Security Token	Enter security token of your salesforce account.

SALESFORCE CONFIGURATION

On the Salesforce Web page:

1. Access the Salesforce app launcher and navigate to "Reports" as displayed on following figures.



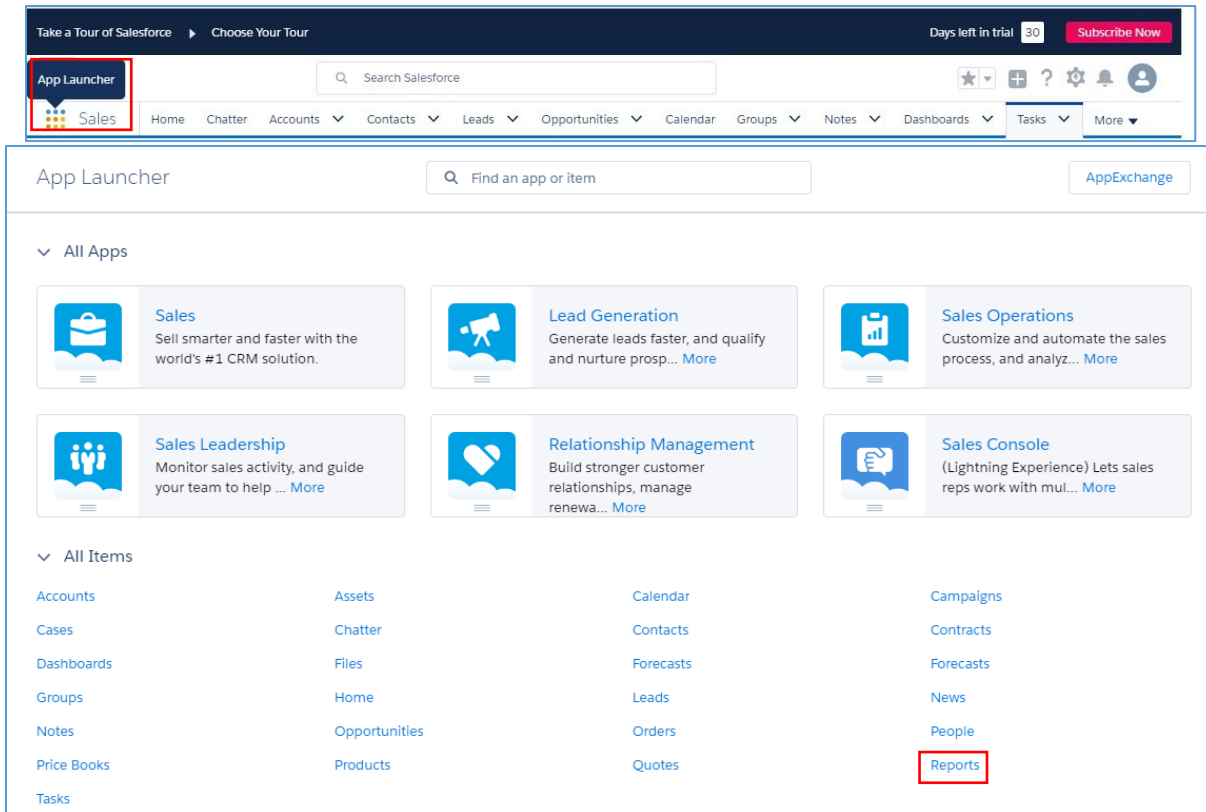


Figure 3: App Launcher

2. Click on “New Report” as shown on below figure.

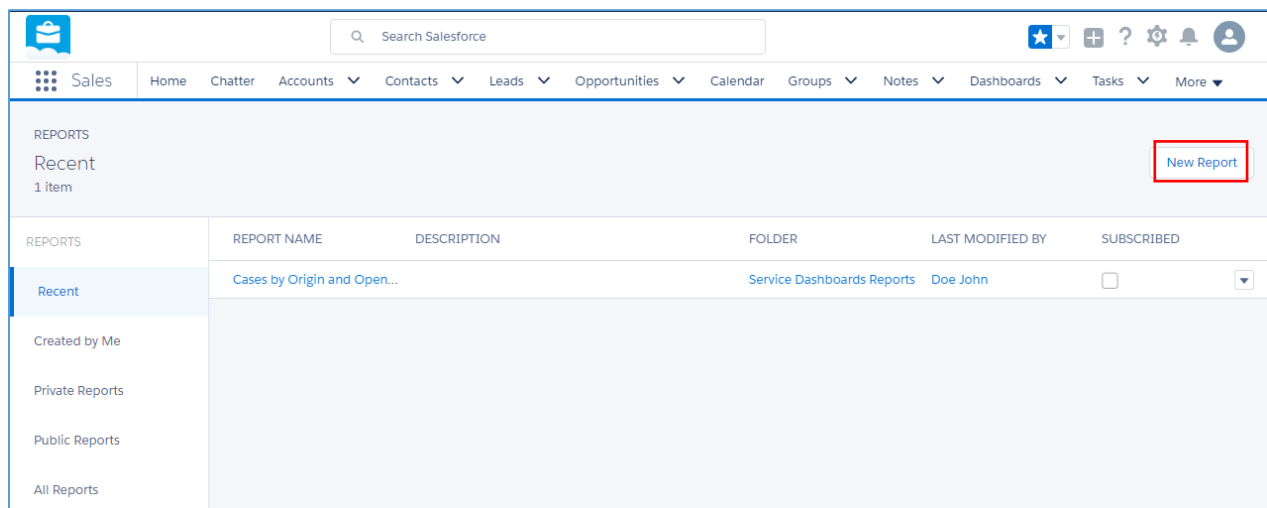
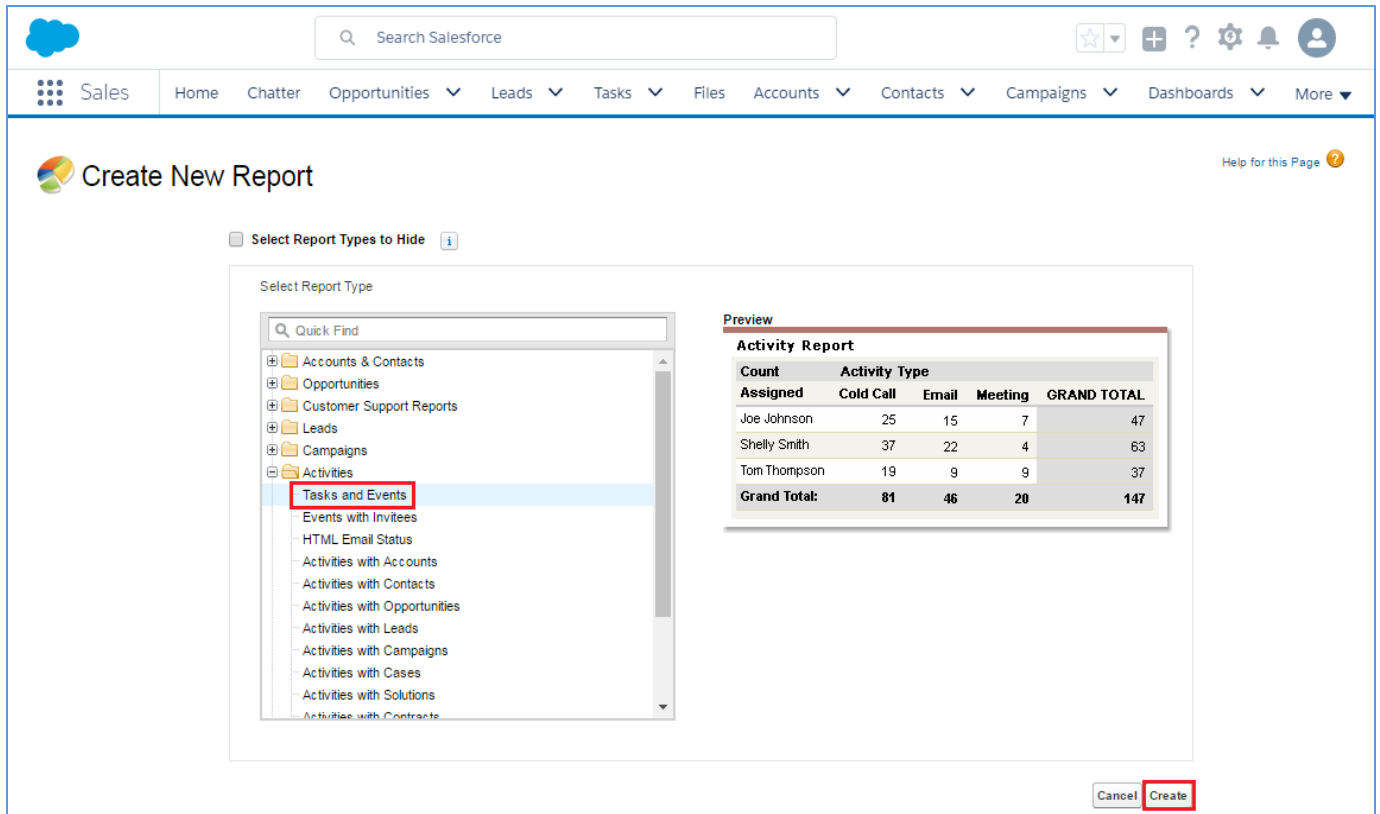


Figure 4: Create New Report

3. On the “Report Type” dropdown select “Activities > Task and Events” report, then click on “Create” as displayed on the following screenshot.





Create New Report

Select Report Types to Hide

Select Report Type

Quick Find

- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
 - Tasks and Events**
 - Events with Invitees
 - HTML Email Status
 - Activities with Accounts
 - Activities with Contacts
 - Activities with Opportunities
 - Activities with Leads
 - Activities with Campaigns
 - Activities with Cases
 - Activities with Solutions
 - Activities with Contracts

Preview

Activity Report

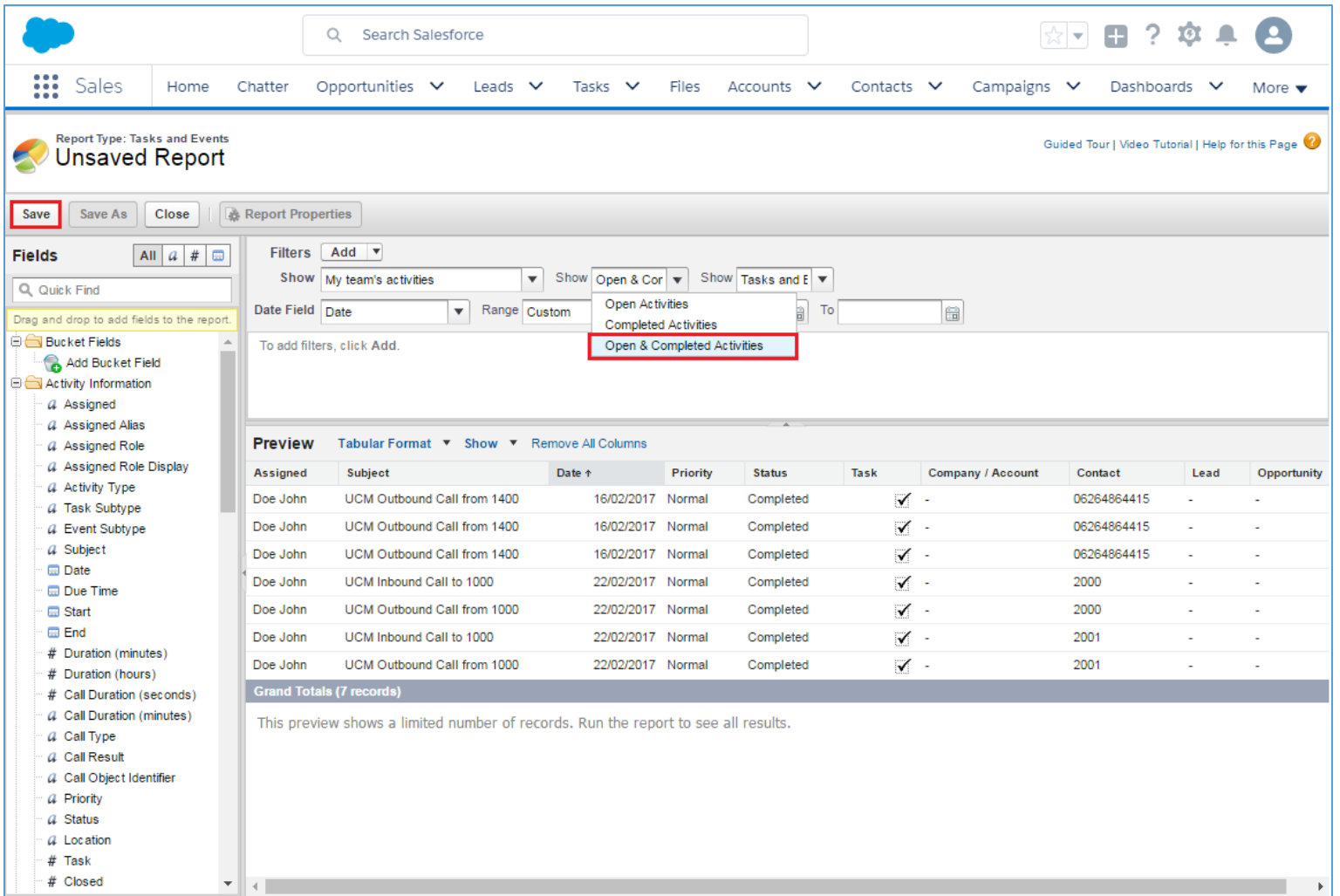
Count	Activity Type			GRAND TOTAL
	Assigned	Cold Call	Email	
Joe Johnson	25	15	7	47
Shelly Smith	37	22	4	63
Tom Thompson	19	9	9	37
Grand Total:	81	46	20	147

Cancel Create

Figure 5: Task and Event Report

- In "Show" dropdown list, select "Open & Complete Activities" then click on "Save".
- On the "Preview window, a list of inbound/outbound calls will be shown.





Report Type: Tasks and Events
 Unsaved Report

Save Save As Close Report Properties

Fields: Add Bucket Field, Activity Information, Date, Due Time, Start, End, Duration, Call Duration, Call Type, Call Result, Call Object Identifier, Priority, Status, Location, Task, Closed.

Filters: Add, Show My team's activities, Date Field Date, Range Custom, Open & Completed Activities.

Assigned	Subject	Date ↑	Priority	Status	Task	Company / Account	Contact	Lead	Opportunity
Doe John	UCM Outbound Call from 1400	16/02/2017	Normal	Completed	✓	-	06264864415	-	-
Doe John	UCM Outbound Call from 1400	16/02/2017	Normal	Completed	✓	-	06264864415	-	-
Doe John	UCM Outbound Call from 1400	16/02/2017	Normal	Completed	✓	-	06264864415	-	-
Doe John	UCM Inbound Call to 1000	22/02/2017	Normal	Completed	✓	-	2000	-	-
Doe John	UCM Outbound Call from 1000	22/02/2017	Normal	Completed	✓	-	2000	-	-
Doe John	UCM Inbound Call to 1000	22/02/2017	Normal	Completed	✓	-	2001	-	-
Doe John	UCM Outbound Call from 1000	22/02/2017	Normal	Completed	✓	-	2001	-	-
Grand Totals (7 records)									

This preview shows a limited number of records. Run the report to see all results.

Figure 6: Report Preview

- Once you click “Save”, a “Save Report” window popup to set a name for the newly created report, fill the information and click on “Save”.



Save Report
Help for this Page ? ✕

Report Name

Report Unique Name i

Report Description

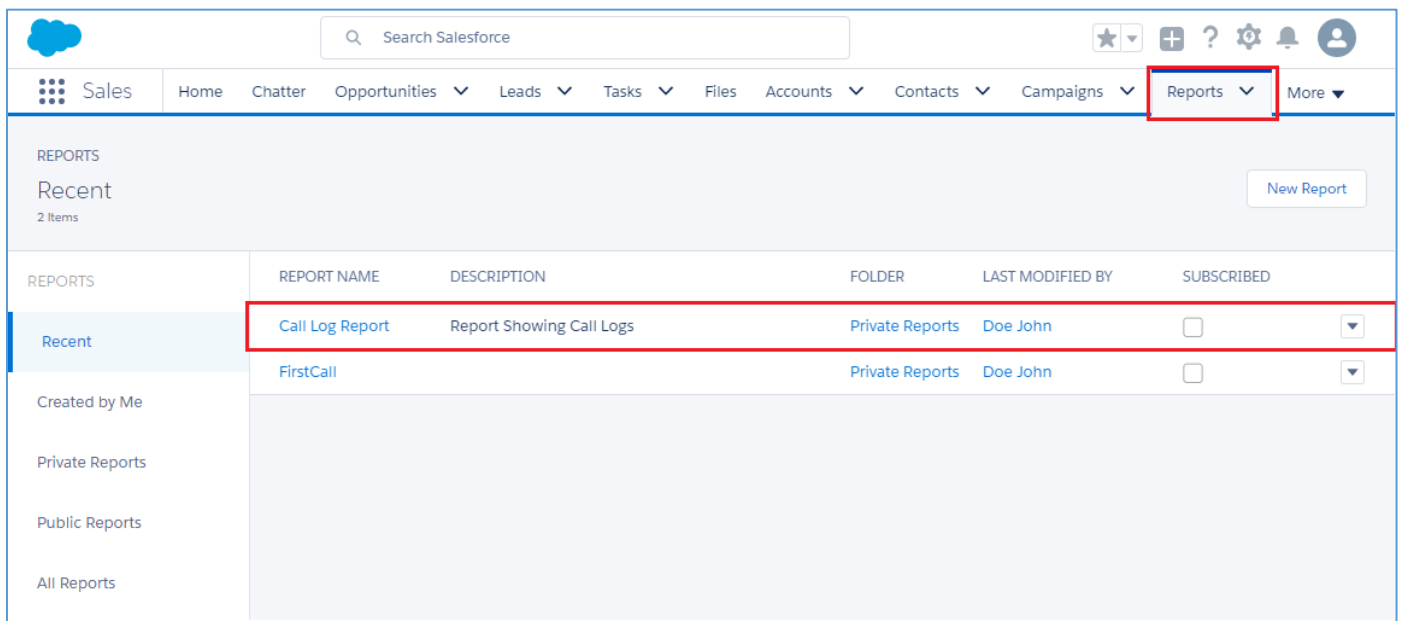
Report Folder ▼

Save Hierarchy Level i

Your report is set to show data from the Hierarchy level of: "Doe John"

Figure 7: Save Report

Whenever users need to check call logs on Salesforce web page, they need to navigate to “Reports” and click on the created report for tasks and events.



The screenshot shows the Salesforce Reports page. The 'Reports' menu item in the top navigation bar is highlighted with a red box. Below it, the 'Recent' report category is selected in the left sidebar. The main table lists reports, with the 'Call Log Report' row highlighted by a red border. The table has columns for Report Name, Description, Folder, Last Modified By, and Subscribed.

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY	SUBSCRIBED
Recent	Call Log Report	Report Showing Call Logs	Private Reports	Doe John	<input type="checkbox"/> ▼
	FirstCall		Private Reports	Doe John	<input type="checkbox"/> ▼

Figure 8: Call Log Report

