Grandstream Networks, Inc.

UCM6xxx IP PBX Series

Salesforce CRM Integration Guide

Table of Content

Table of Figures

Table of Tables

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**".

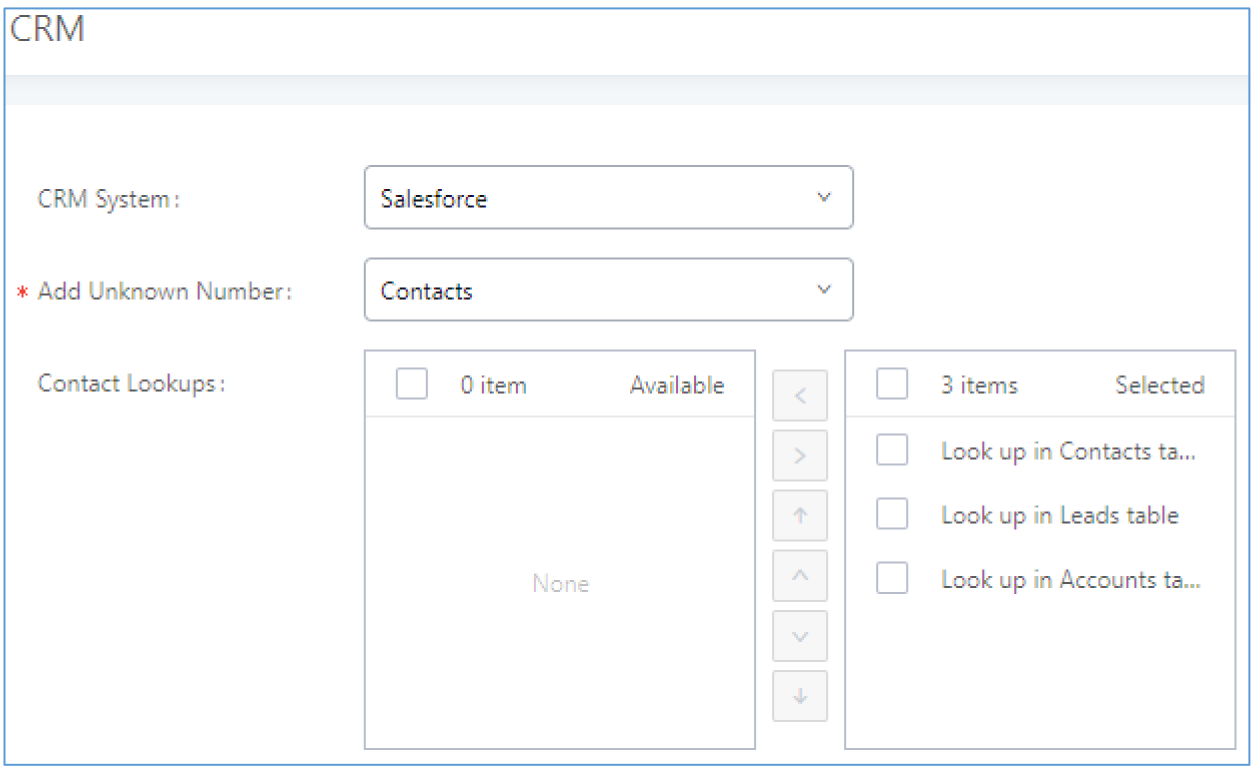

Figure 1: Salesforce Settings

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	Selects CRM tables that will be used to lookup for contact details when making/receiving calls. Press > to select where the UCM can perform the lookups on the CRM tables

Once users finish configuring above settings using admin access:

2. Click on Save and Apply Changes.
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 Save and Apply Changes.

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

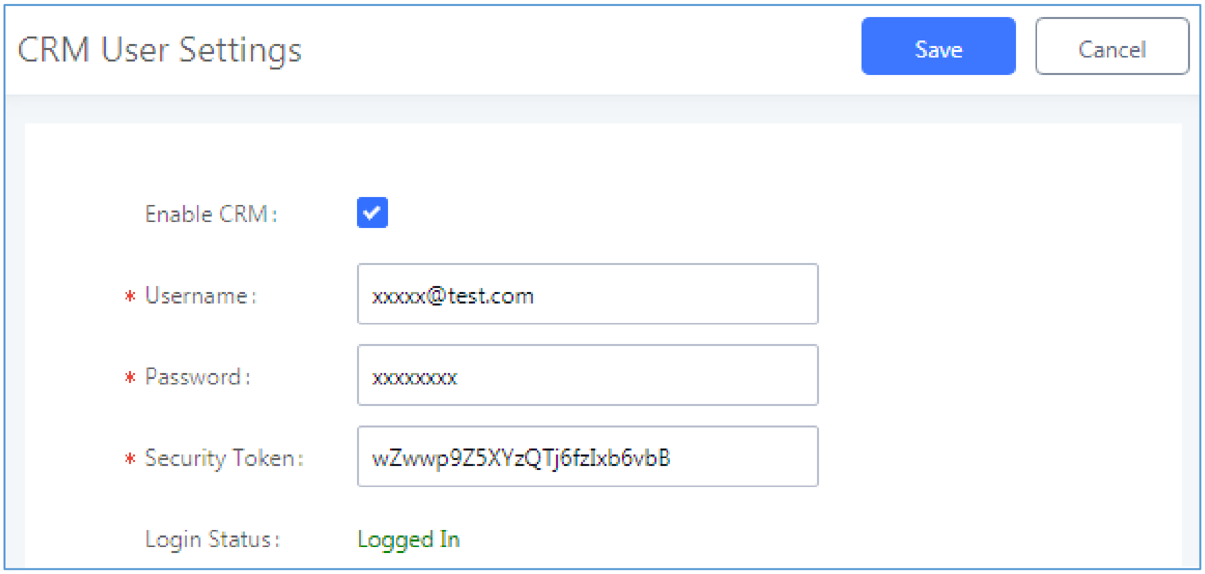

Figure 2: CRM User Settings

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.

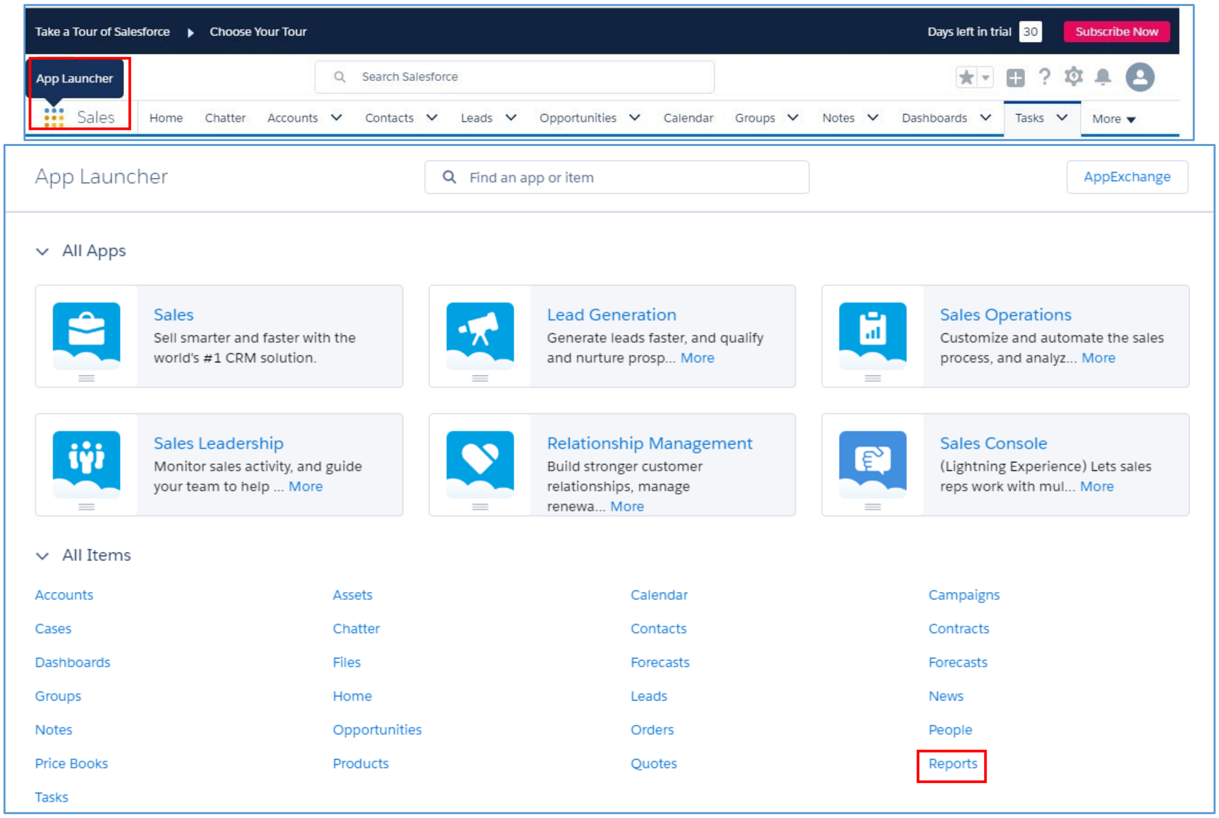

Figure 3: App Launcher

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

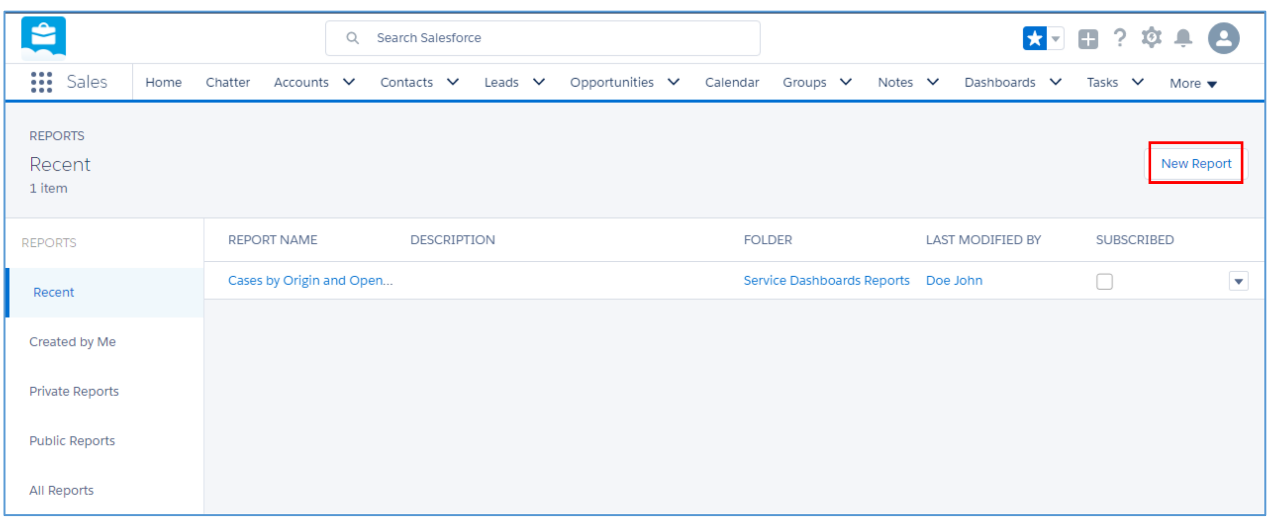

Figure 4: Create New Report

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

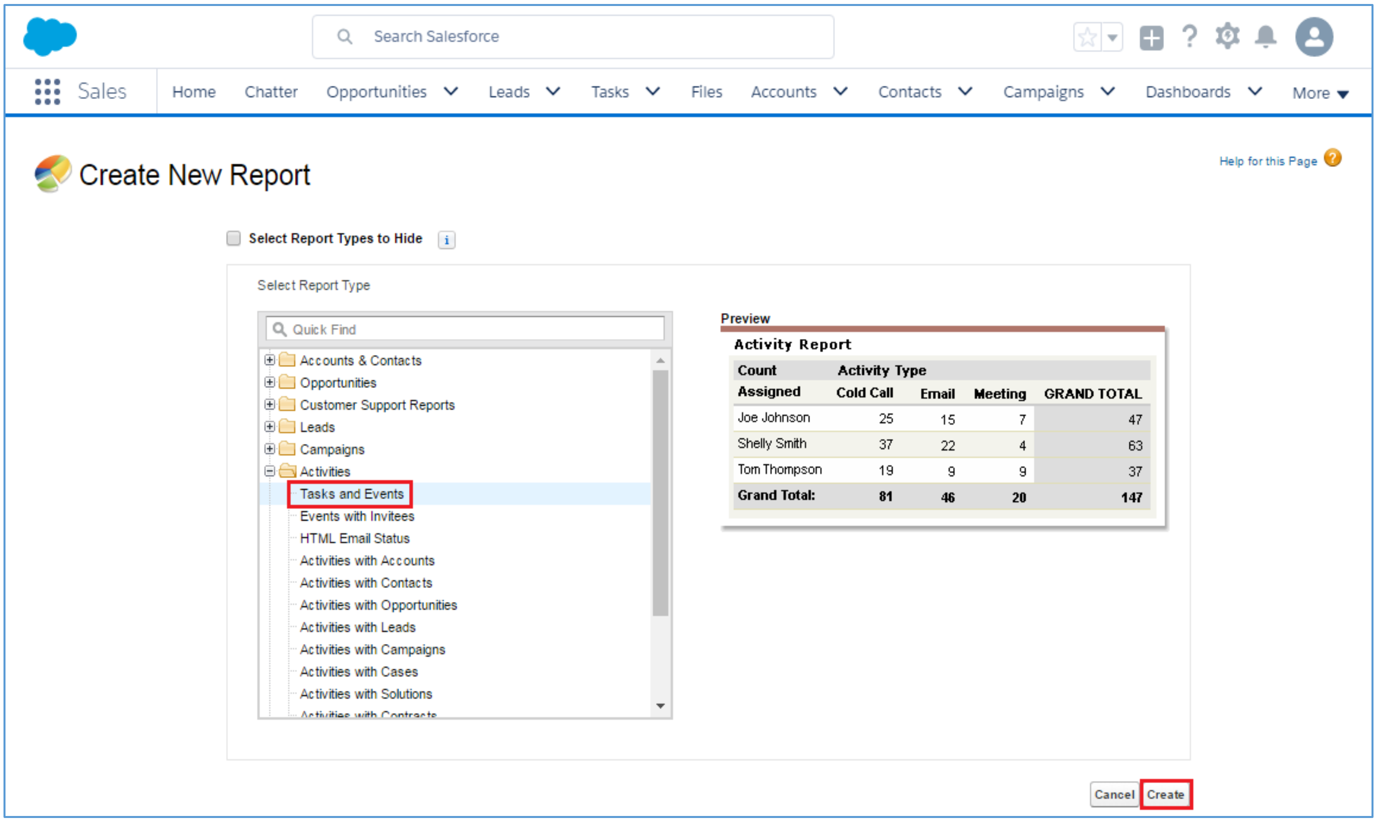

Figure 5: Task and Event Report

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

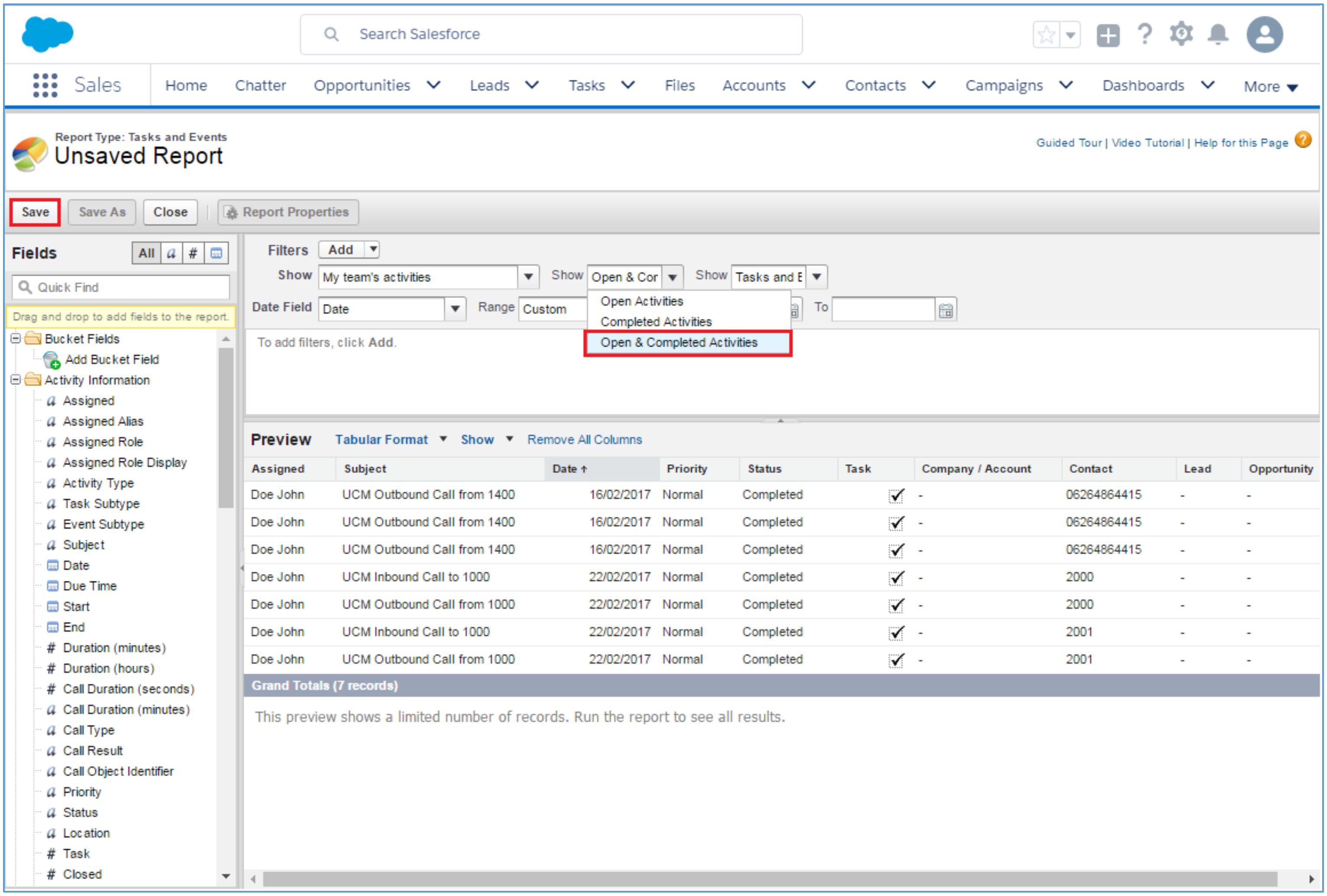

Figure 6: Report Preview

6. 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".

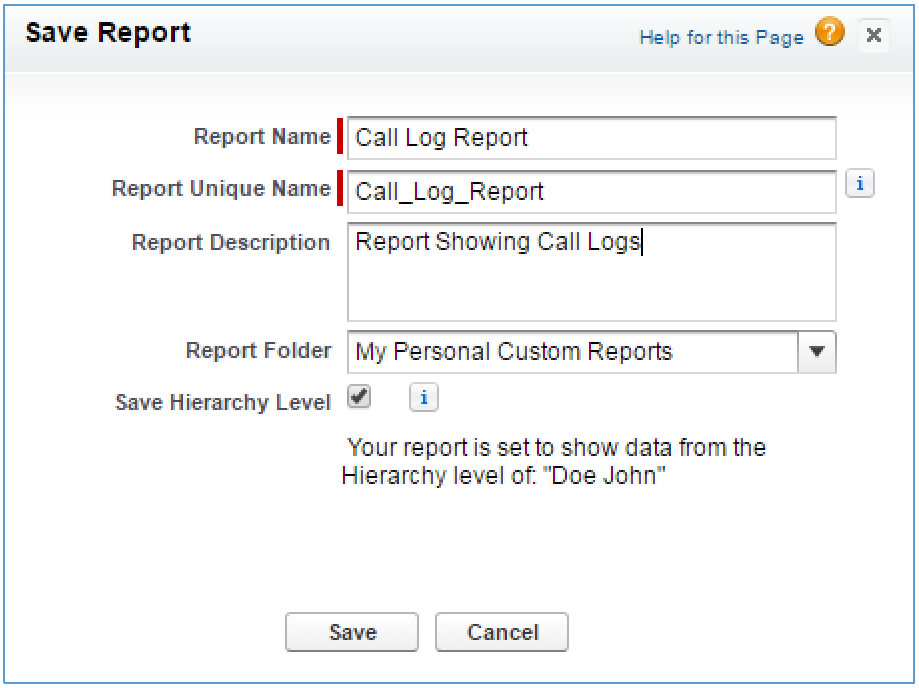

Figure 7: Save Report

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.

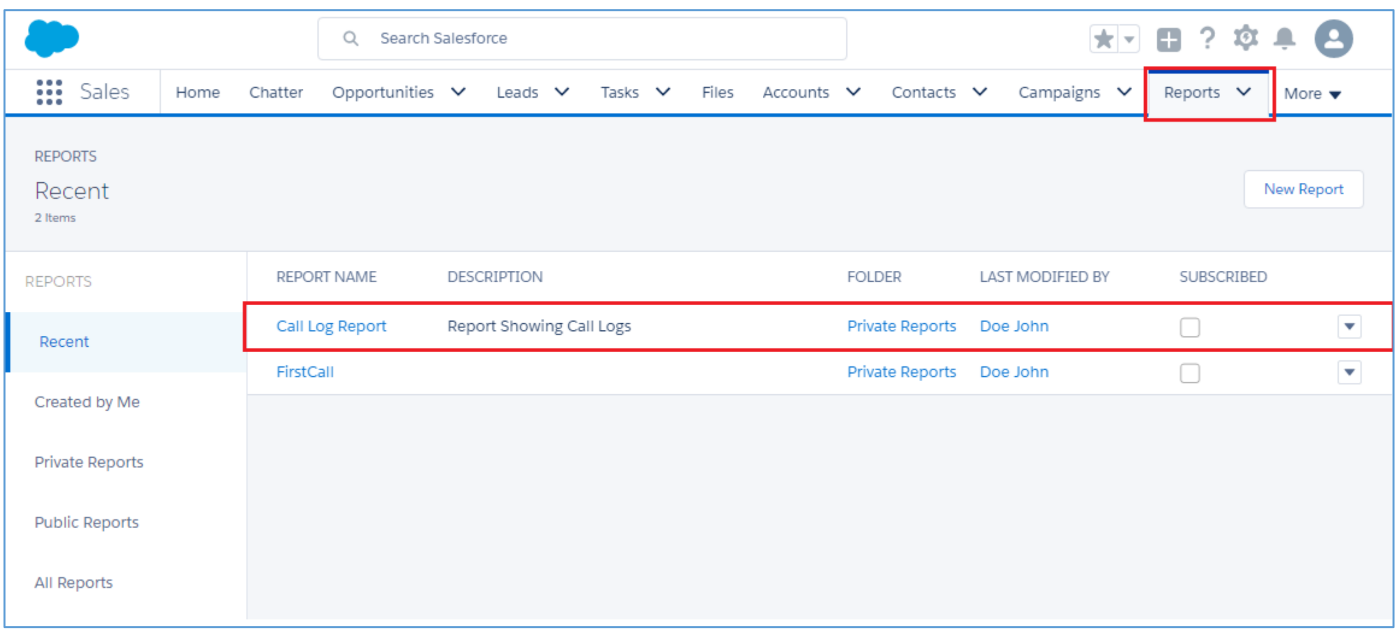

Figure 8: Call Log Report