Keyyo Unify

Integrated Telephony Application for Salesforce

Installation Guide

Important: You have to be an administrator to install and deploy Keyyo Unify for your users.

Table of Contents

1 Install Keyyo Unify

1.1 Install Keyyo Unify package

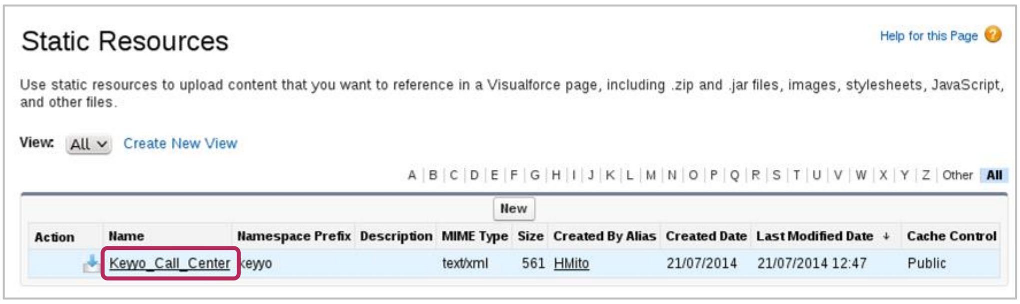
- Go to the [AppExchange]
- Click on "Get It Now" and then on "Log in to the AppExchange"
- Enter your Salesforce credentials and validate
- Click on "Install in production"
- Check the box "I have read and agree to the terms and conditions" and click on "Confirm and Install!"
- In the package installation detail page, click on "Continue". Then, in the "Approve third party Access", check "Yes" and "Continue"
- Follow then the steps to install the app

As you can see, Keyyo Unify is now installed in Salesforce!

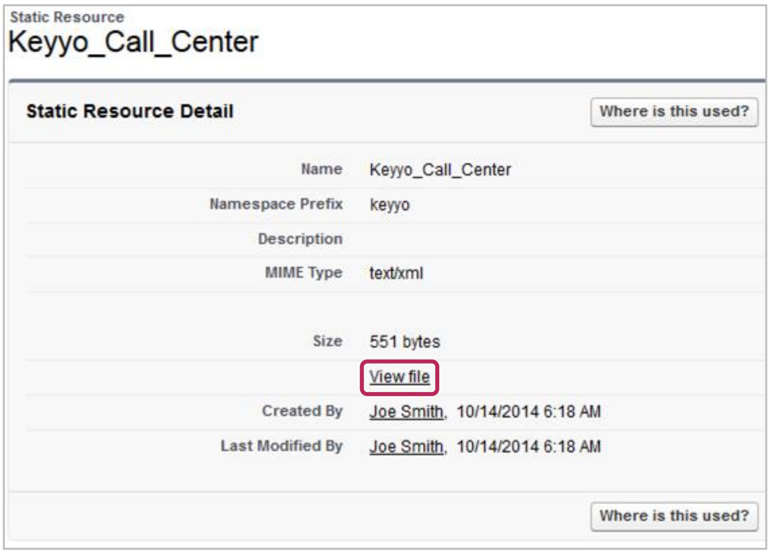
1.2 Install Keyyo Unify call center

You now have to install a new "Call Center" in your Salesforce organization.

- From the Salesforce setup page,
  - Salesforce Lightning: Search "Static Resources"
  - Salesforce Classic: Go to "Build", "Develop" and then click on "Static Resources"
- Click on "Keyyo_Call_Center"

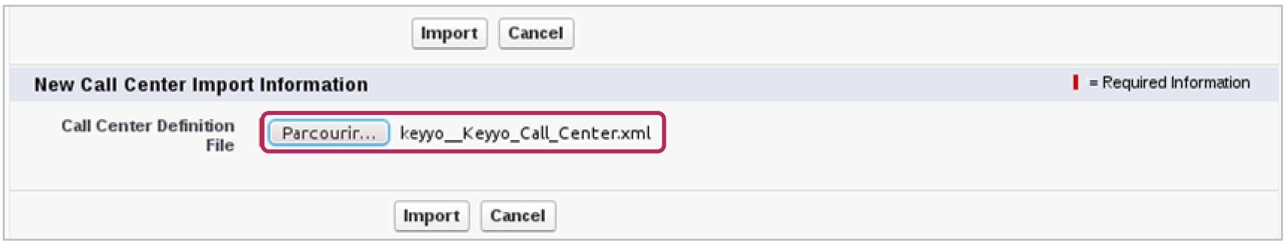


- Right click on "View file", and save the file on your computer (you will have to upload the file in a few minutes)

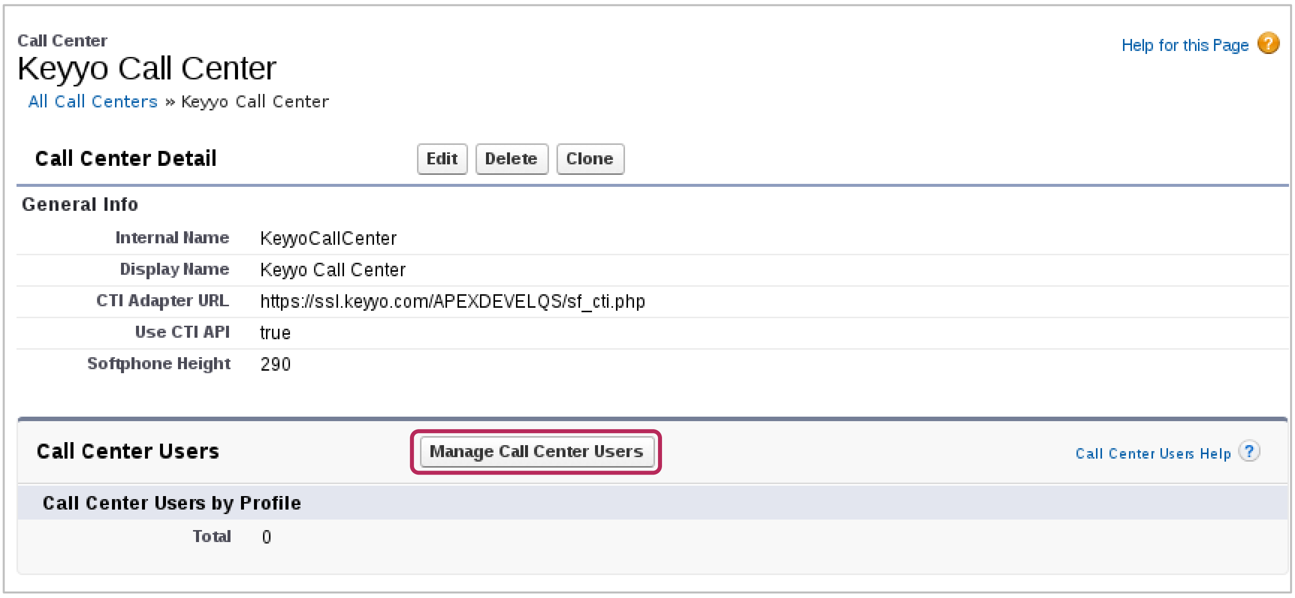


- Again from the sidepanel,
  - Salesforce Lightning: Search "Call Centers"
  - Salesforce Classic: Go to "Customize", click successively on "Call Center" and "Call Centers"
- Click on "Import"
  Note: If this is the first time you import a call center, you will probably see a page entitled "Introducing Salesforce CRM Call Center" ; Please click on "Continue".

- Choose the file you previously saved on your computer, then click on "Import"

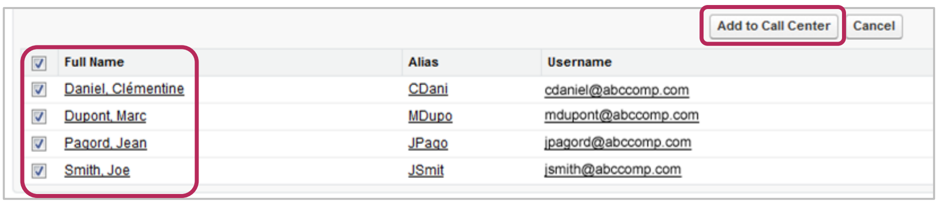


- Click on "Manage Call Center Users"



- Click "Add More Users"

- Click on "Find" to access the user list of your Salesforce organization
- Select the users who will use Keyyo Unify, and click "Add to Call Center"

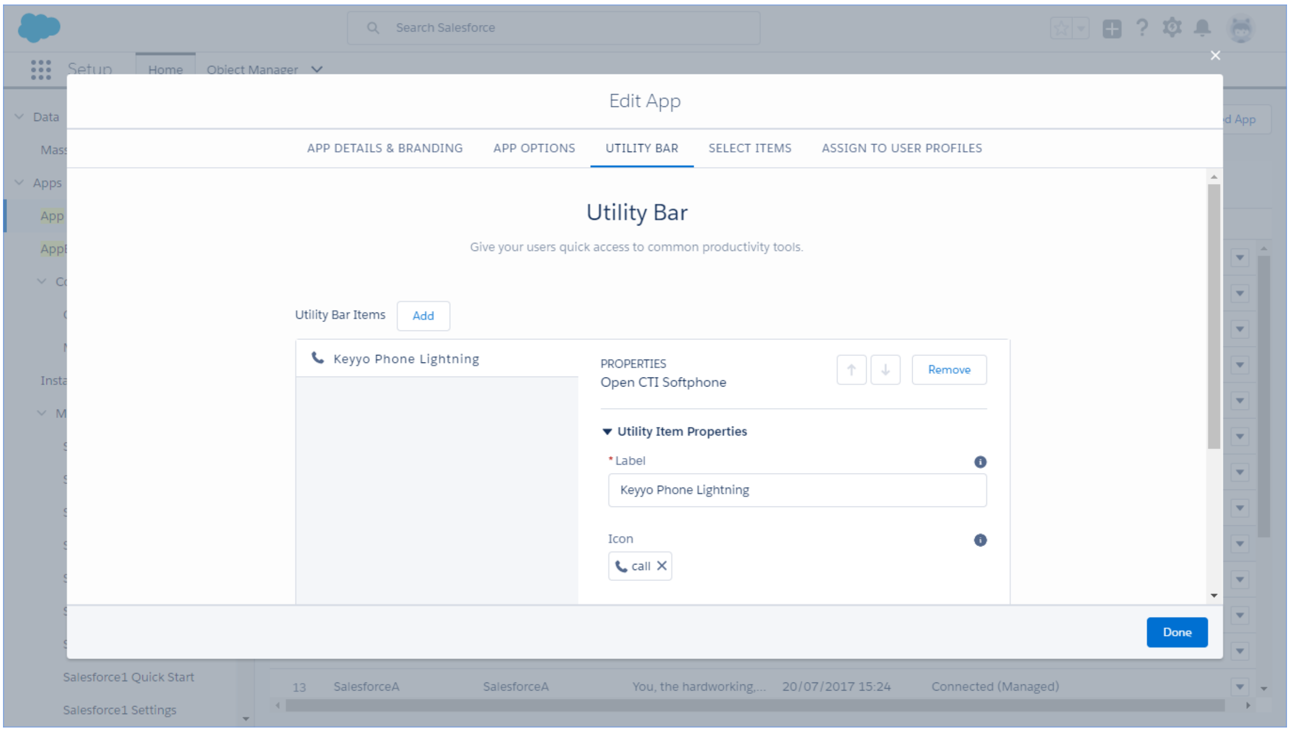


1.3 Integrate Keyyo Unify in Salesforce

This step is only necessary for Salesforce Lightning.

Add Keyyo Unify to the Lightning application of your choice:

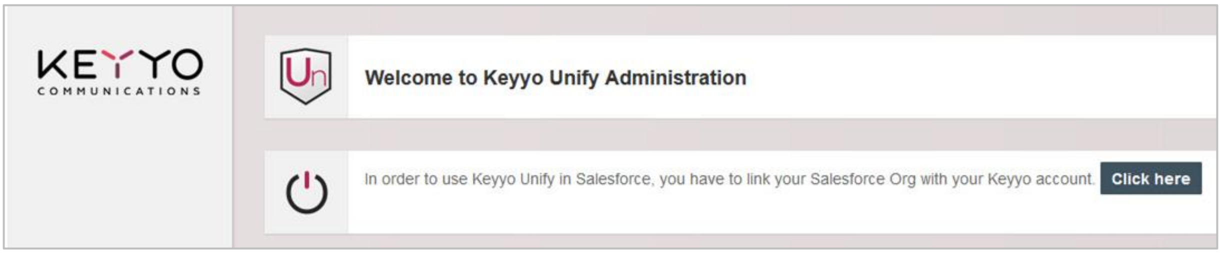
- From the Salesforce setup page, search "App Manager"
- For the Lightning application you've chosen, for instance "Sales", click the menu on the right and select "Edit"
- Select the "Utility Bar" tab, click the "Add" button and choose "Open CTI Softphone"
- Leave the default values, save and click "Done"



1.4 Associate your Keyyo account to your Salesforce organisation

- Access the Keyyo Unify configuration page,
  - Salesforce Lightning: Click on the "App Launcher" button and choose "Keyyo Unify Administration"
  - Salesforce Classic: Click the "+" button and choose "Keyyo Unify Administration"

- The first time you open this page, you have to associate your Salesforce organization to your Keyyo account; click on "Click here"



- You are then redirected to an authorization page where you have to enter the login and password of your **Keyyo administrator account**
- Check the right box and click on "Authorize"

Note for Professional Edition only: If an error occurs, you may need to follow the few steps detailed below.

Add the Keyyo Line user page layout

- Go to the Salesforce setup page,
  - Salesforce Lightning:
    - Search "Object Manager"
    - Click on "User" then on "User Page Layouts"
    - Click on "Edit"
  - Salesforce Classic:
    - In the "Build" section, click on "Customize"
    - Then, click on "Users" and "Page Layout"
    - Click on "Modify" next to "User page layout"
- Drag-and-drop "Keyyo line" in "Additional Information"

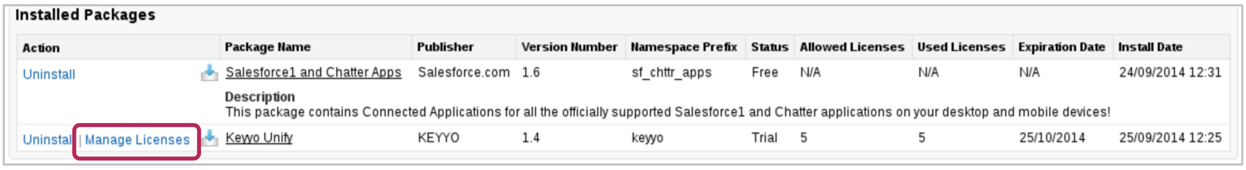
2 Configure Keyyo Unify

2.1 Associate your Keyyo Unify licenses to your Salesforce users

You now have to associate the Keyyo Unify license(s) to your Salesforce user(s):

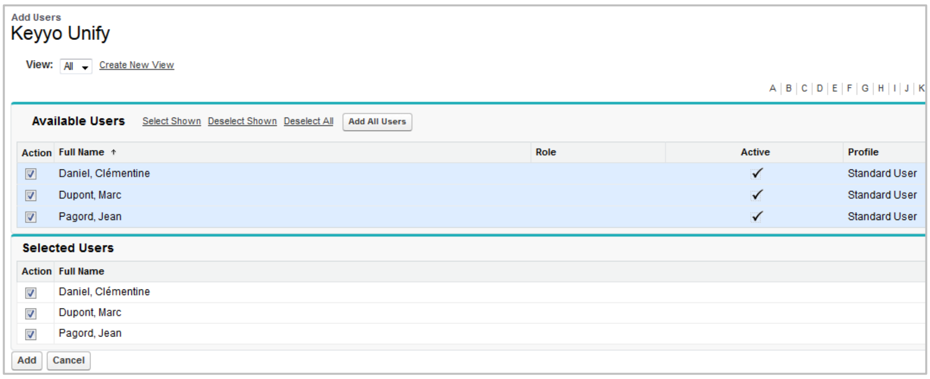
- From the Salesforce setup page,
  - Salesforce Lightning: Search "Installed Packages"
  - Salesforce Classic: Go to "Build", then "Installed Packages"

- Click on "Manage Licenses"



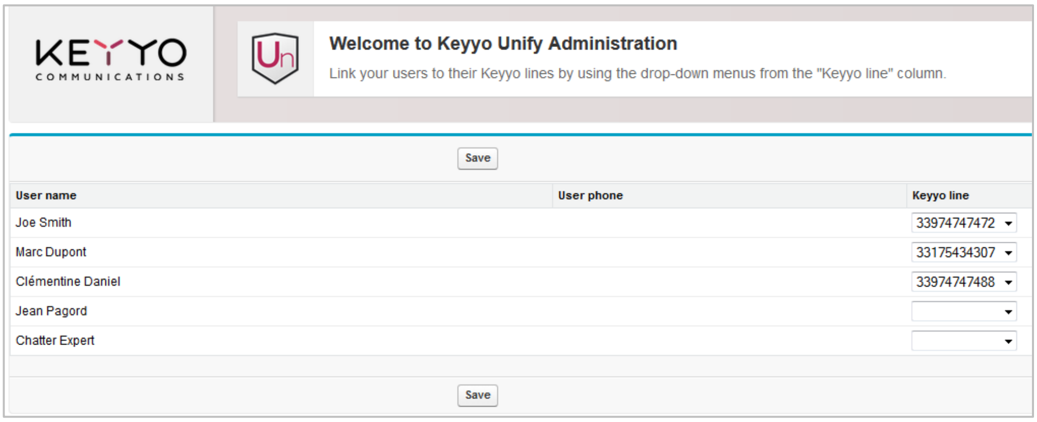
- Then click on "Add Users"

- Choose the users who will use Keyyo Unify and click on "Add"
  Note: You can add as many users as available Keyyo Unify licenses.



2.2 Associate your Keyyo lines to their Salesforce user

- Go back to the "Keyyo Unify Administration" page and associate Keyyo Unify users to their Keyyo lines, then click on "Save"



2.3 Define the call outcome field

In the "Keyyo Unify Administration" page, you can pick the field that you want to use to save the outcome of the call.

If you select "Task Status", the default outcomes will be: Not Started, In progress, Completed, Waiting on someone else or Deferred.

If you choose, "Task custom field: Outcome", you will be able to customize the outcome values:

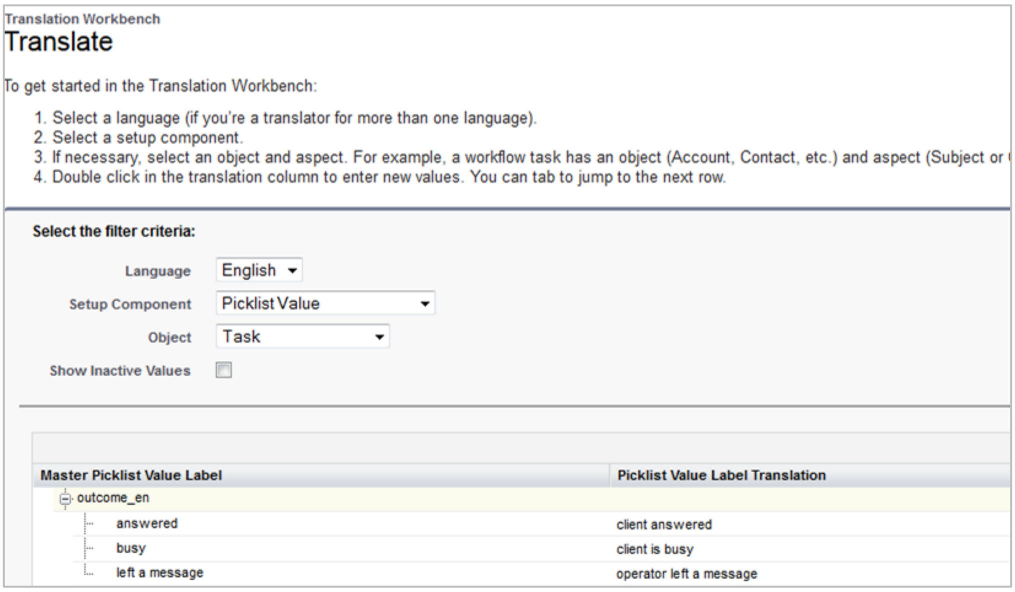
- In the Salesforce setup page,
  - Salesforce Lightning:
    - Search "Object Manager"
    - Select "Activity", then "Fields & Relationships"
    - Click on "Outcome"
  - Salesforce Classic:
    - Go to "Build" → "Customize" → "Activities" → "Activity Custom Fields"
    - Click on "outcome"
- You can add new Picklist Values, or edit the existing values

2.4 Translate the call outcomes

Salesforce Lightning: You can translate the call outcomes directly from the page accessed in the previous paragraph.

Salesforce Classic:

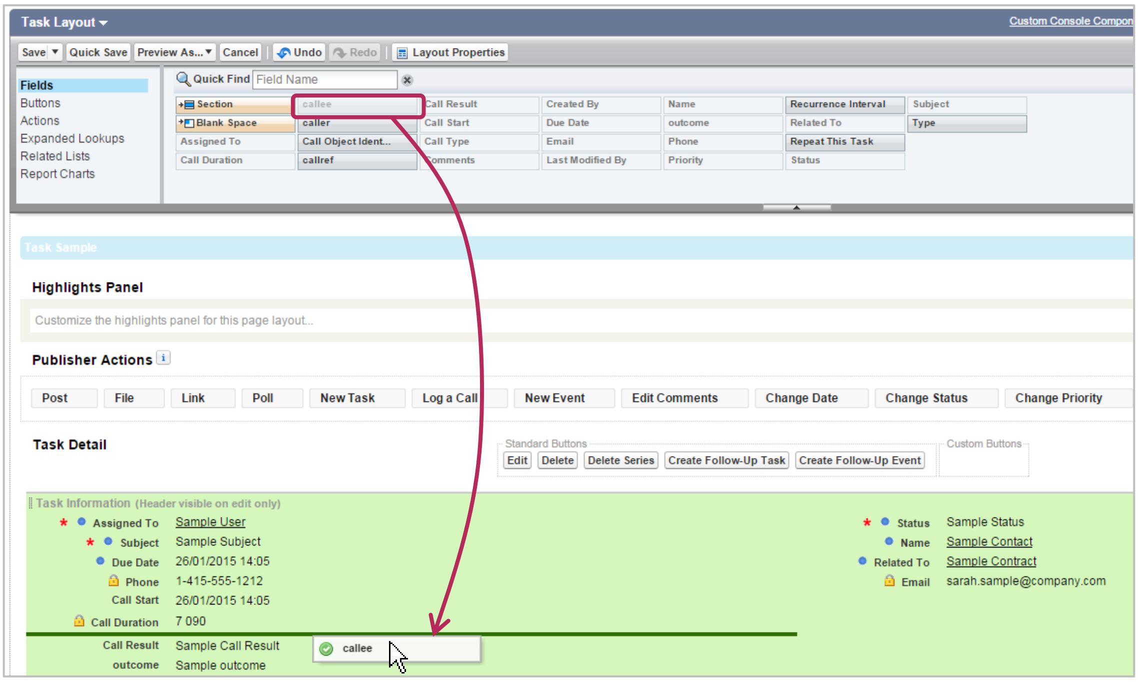
- From the Salesforce setup page, go to "Administer", "Translation Workbench" and click on "Translate"
- Select "Picklist Value" in the "Setup Component" drop-down menu and "Task" in the "Object" dropdown menu
- You can modify each value in French and English



2.5 Customize the task page layout

To display the call information in the task page (duration, call type…), you need to personalize the task page layout:

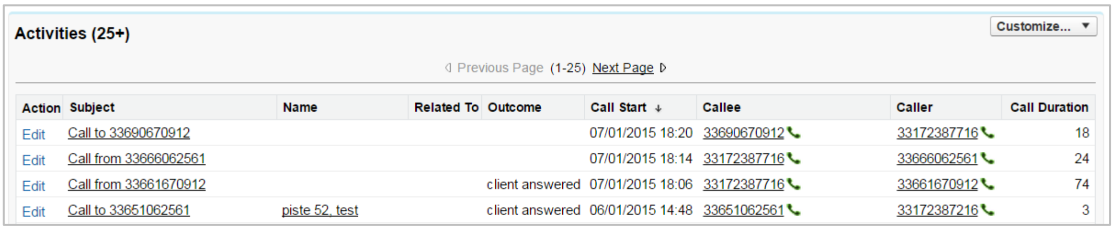
- From the Salesforce setup page,
    - Salesforce Lightning:
        - Search "Object Manager", then click on "Task"
        - Select "Page Layouts"
    - Salesforce Classic:
        - Go to "Build", "Cutomize" and click on "Activities"
        - Select "Task Page Layout"
- Click on "Edit" next to "Task Layout"
- Drag-and-drop a field containing call information from the "Task Layout" section to the "Task detail" one
- Repeat that for each of the following fields referring to call details: Call duration, Call Start, Callee, Caller, Call Type, Call outcome (or Call Result), Call Ref.



KEYYO COMMUNICATIONS

Tips: To enhance the Keyyo Unify user experience, you can customize the activity search layout of your Salesforce users. For instance, you can display the call outcome, the duration, the caller or callee number, or any other information.

- From the Salesforce setup page,
  - Salesforce Lightning:
    - Search "Object Manager"
    - Click on "Activity", then on "Search Layouts"
    - Next to "Search results", click on "Edit"
  - Salesforce Classic:
    - Click on "Build", "Customize" and on "Activities"
    - Then, click on "Activity Search Layouts"
    - Next to "Search results", click on "Edit"
- Add the columns you want in "Selected fields"
- Check "Override the search result column customizations for all users"
- Click on "Save"


Activities (25+)

Customize...

Previous Page (1-25) Next Page

Action	Subject	Name	Related To	Outcome	Call Start	Callee	Caller	Call Duration
Edit	Call to 33690670912				07/01/2015 18:20	33690670912	33172387716	18
Edit	Call from 33666062561				07/01/2015 18:14	33172387716	33666062561	24
Edit	Call from 33661670912			client answered	07/01/2015 18:06	33172387716	33661670912	74
Edit	Call to 33651062561	piste 52, test		client answered	06/01/2015 14:48	33651062561	33172387216	3

You are ready to use the Keyyo Unify App!

3 Tune Keyyo Unify

Go back to "Keyyo Unify Administration" page.

3.1 Pick where the call outcome should be saved

You can choose to save the call outcome selected by the Salesforce user in the task either in the custom field ("Outcome") or in the status generic field.

3.2 Save the due date, or not

You can choose to save the due date, or not, which is the call date by default.

3.3 Control the automatic task creation

By default, a task is automatically created for each call. You can disable this feature though, either for the missed calls or for all calls.