Keyyo Unify

Integrated Telephony Application for Salesforce

User Guide

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Make a call

To make a call, click on a phone number in a contact card, a lead or an account for instance.
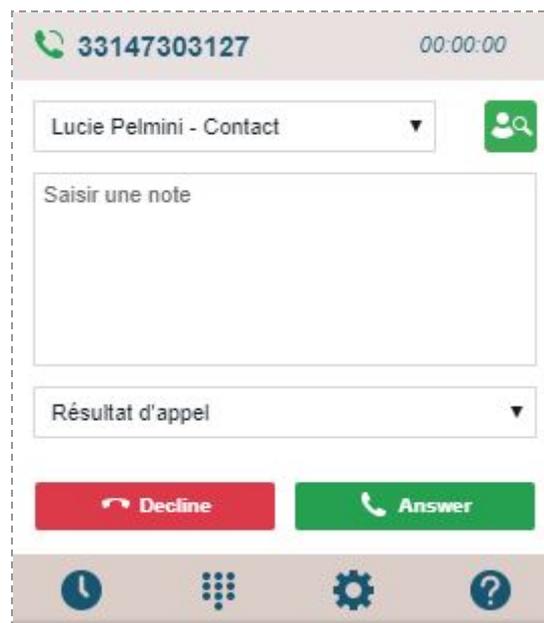
By default, you should pick up the call on your Keyyo line to initiate the outgoing call.
If you'd like, you can enable the automatic pick up on your landline (your phone will use the handsfree mode). To do this, go to the user settings.

You can also dial a number from the application keypad.

Control an incoming call

When you receive a call, a new modal window is created.

You can either click on:
- **Answer**, the call is then automatically picked up on your phone (in handsfree mode).
- **Decline**, the call is then rejected and the caller is redirected to your voicemail.

If you were on another modal window and if you return to the call list, click on the new incoming call to display its modal window.

Control an ongoing call
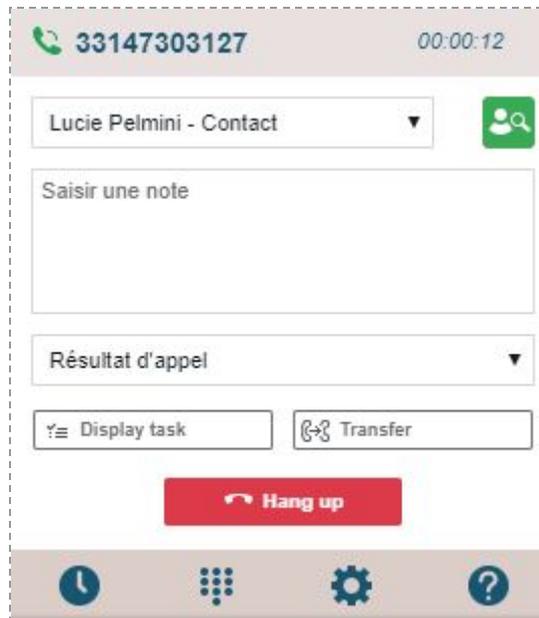
When you're in a call, from its modal window, you can either click on:
- **Display task**, to display the Salesforce task created for the call.
- **Transfer**, to transfer the call to a contact, a lead or an account for instance.
- **Hang up**, to terminate the call.

You can also transfer a call to a third-party number from the application keypad.

Note : If the automatic task creation is set by default, a task is created as soon as the call is picked up and a "Update task" button is available to update the task whenever you want (see the "Qualify a call" section for more details).

Qualify a call
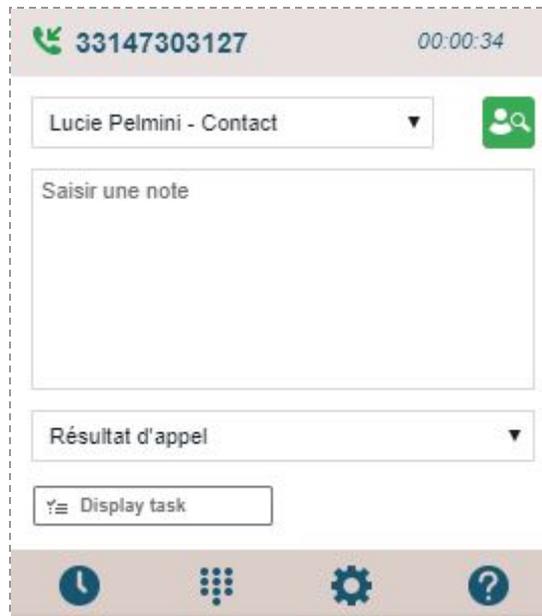
You can from the modal window of a call:
- Choose, based on the phone number, a contact, a lead or an account for instance to associate to the call (otherwise, the most relevant one is selected) and access its card,
- Write a comment about this call,
- Choose a call outcome,
- See the call task.

By default, when you select an outcome, the call task is automatically opened.
If you'd like, you can disable the automatic task opening from the user settings.
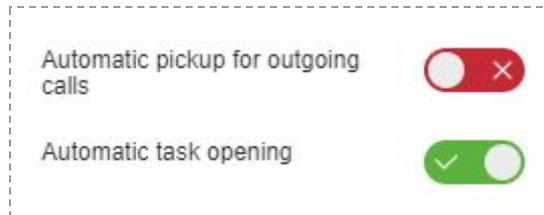

If you return to a call from the call list and modify the information, click on "Update" to save your changes.

Define the users settings

Two user settings are available.

Automatic pickup for outgoing calls: if enabled, the calls starts automatically from your phone (in handsfree mode) when you initiate a call from the application; otherwise, you have to pick up the call from your phone.
This setting is disabled by default.

Automatic task opening: if enabled, the call task is automatically opened when you select a call outcome; otherwise the outcome is silently saved.
This setting is enabled by default.