



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.

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1 Install Keyyo Unify

1.1 Install Keyyo Unify package

- Go to the <u>AppExchange</u>
- 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"

Static Resou	rces						Не	lp for this Page 🥜
Use static resources to and other files.	upload content that you want t	to referen	ce in a Vi	sualfor	ce page, includin	g .zip and .jar	files, images, stylesh	eets, JavaScript,
View: <u>All v</u> Create I	lew View	A B	C D E	FG	H I J K L M	N O P Q	R S T U V W X	Y Z Other All
				New				
Action Name	Namespace Prefix De	scription	МІМЕ Тур	e Size	Created By Alias	Created Date	Last Modified Date $\ \downarrow$	Cache Control
Kewo_Cal	<u>Center</u> keyyo		text/xml	561	<u>HMito</u>	21/07/2014	21/07/2014 12:47	Public



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

atic Resource Detail	Where is this use
Name	Keyyo_Call_Center
Namespace Prefix	keyyo
Description	
MIME Type	text/xml
Size	551 bytes
	<u>View file</u>
Created By	Joe Smith, 10/14/2014 6:18 AM
Last Modified By	Joe Smith, 10/14/2014 6:18 AM

- 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".

All Call Ce	enters		Help for this Page 🥝
A call center corre Salesforce.com us	sponds to a single cor ers must be assigned	mputer-telephony integration is to a call center before they conternate the second sec	(CTI) system already in place at your organization. :an use any Call Center features.
Name 🕇	Version	Created Date	Last Modified Date
No records to displa	ay.		

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

	Import	
New Call Center Impor	t Information	= Required Information
Call Center Definition File	Parcourir keyyo_Keyyo_Call_Center.xml	
	Import Cancel	



• Click on "Manage Call Center Users"

Call Center Keyyo Call Cent All Call Centers » Keyyo C	Cl all Center	Help for this Page 🥑
Call Center Detail	Edit Delete Clone	
General Info		
Internal Name	KeyyoCallCenter	
Display Name	Keyyo Call Center	
CTI Adapter URL	https://ssl.keyyo.com/APEXDEVELQS/sf_cti.php	
Use CTI API	true	
Softphone Height	290	
Call Center Users	Manage Call Center Users	Call Center Users Help 🕐
Call Center Users by I	Profile	
Total	0	

• Click "Add More Users"

All Call Centers » Keyyo Call Center: ManaQ All Call Centers » Keyyo Call Center » Man View: All v Create New View	je User s ^{age Users}	S																					I	Help	for ti	his Pag	e 🕜
		А	В	С	D	Е	F	G	Н		J	κ	LIN	4 N	0	P	Q	R	S	Τ	U	V	W 3	XΙ	'ΙΖ	Other	All
		Ac	d M	lor	e U	ser	s	R	em	ove	e Us	ers															
Full Name 🔹	Alias					Use	erna	ume	e								Rol	e				Pr	ofile	9			
No records to display.																											

- 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"

					Add to Call Center	Cancel
1	V	Full Name	Alias	Username		
	V	Daniel, Clémentine	<u>CDani</u>	cdaniel@abccomp.com		
	V	Dupont, Marc	MDupo	mdupont@abccomp.com		
	\checkmark	Pagord, Jean	JPago	jpagord@abccomp.com		
	V	Smith, Joe	<u>JSmit</u>	jsmith@abccomp.com		



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"

		Q. Search Salesforce	🔬 🖬 ? 🏟 🌲 👼	
	Setup Home Obie	ct Manager 🗸	×	
∨ Data		Edit App	d App	
Mass		APP DETAILS & BRANDING APP OPTIONS UTILITY BAR SELECT ITEMS ASSIGN TO USER PROFILES		
∨ Apps			A	
Арр		Utility Bar		
App		Give your users quick access to common productivity tools.		
		Utility Bar Items Add		
η		📞 Keyyo Phone Lightning PROPERTIES 🔶 Remove		
		Open CTI Softphone		
		✓ Utility Item Properties		
		•Label		
		Keyyo Phone Lightning		
		Icon		
S		€, call ×		
9				
S			Done	
S	Salesforce1 Quick Start	13 SalesforceA SalesforceA You, the hardworking 20/07/2017 15:24 Connected	(Managed)	Ţ
9	Salesforce1 Settings		······································	

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"

D	Proits d'accès à l'application
	Un
	Keyyo Unify
Vec	uillez renseigner les identifiants de votre npte administrateur Keyyo
Identif	ant
Mot de	e passe
lot de pa	asse oublié ?
) je d	lonne à l'application Keyyo Unify les droits suivants :
	Modification des modules CTI
1	Lancement d'un appel
1	Envoi d'un SMS
~ ~	
	Connexion au CTI Websocket
5	Connexion au CTI Websocket Lecture de la liste des lignes VOIP



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"

Installed Packages														
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date					
Uninstall	Salesforce1 and Chatter Apps	Salesforce.com	1.6	sf_chttr_apps	Free	N/A	N/A	N/A	24/09/2014 12:31					
	Description This package contains Connected Applications for all the officially supported Salesforce1 and Chatter applications on your desktop and mobile devices!													
Uninstal Manage Licenses	Kewo Unify	KEYY0	1.4	keyyo	Trial	5	5	25/10/2014	25/09/2014 12:25					

• Then click on "Add Users"

Package De Keyyo Back to Pi	tails Unify revious Page												He	lp for	this Paç	je 🕜
	Package Name	Keyyo Unify				Publisher	KEYY0									
	Status	Trial			Allowe	d Licenses	5									
	Expiration Date	25/10/2014			Use	d Licenses	2									
					A B C D E	F G H I	J K L	м N O	PQ	RS	T U	V	w x	Y Z	Othe	r All
License	ed Users		Add Users	Remove Multiple Users												
Action	Full Name 🛧			Role	Active	Profile										

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

Add User	o Unify			
View:	Al Create New View			
			A B C D	E F G H I J
Ava	ilable Users <u>Select Shown</u> <u>Deselect Shown</u> <u>Deselect All</u> Add All Users			
Action	Full Name 🔹	Role	Active	Profile
V	Daniel, Clémentine		✓	Standard User
V	Dupont, Marc		✓	Standard User
	Pagord, Jean		\checkmark	Standard User
Selec	ted Users			
Action	Full Name			
V	Daniel, Clémentine			
V	Dupont, Marc			
v	Pagord, Jean			
Add	Cancel			



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"

		Welcome to Keyyo Unify Administration Link your users to their Keyyo lines by using the drop-down menus from the "Keyyo line" column.					
		Save					
User name		User phone	Keyyo line				
Joe Smith			33974747472 👻				
Marc Dupont			33175434307 👻				
Clémentine Daniel			33974747488 👻				
Jean Pagord			•				
Chatter Expert			•				
		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

Translation Workbench Translate									
To get started in the Translati	on Workbench:								
 Select a language (if you're a translator for more than one language). Select a setup component. If necessary, select an object and aspect. For example, a workflow task has an object (Account, Contact, etc.) and aspect (Subject or 4. Double click in the translation column to enter new values. You can tab to jump to the next row. 									
Select the filter criteria:	Select the filter criteria:								
Language	Language English -								
Setup Component Picklist Value									
Object	Object Task 👻								
Show Inactive Values									
Master Dicklint Value Lab	al	Bioklist Value Label Translation							
i outcome_en	ei	Pickinst value Laber franslation							
- answered		client answered							
busy		client is busy							
left a message		operator left a message							



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.

Task Layout -								Custom Console Compo
Save V Quick Save Prev	view As Cancel	🔊 Undo 🛝 Redo 📔	E Layout Proper	ties				
Fields Quick Find Field Name *								
Buttons Actions Expanded Lookups Related Lists Report Charts	+ Section + Blank Space Assigned To Call Duration	callee caller Call Object Ident callref	Call Result Call Start Call Type Comments	Created By Due Date Email Last Modified By	Name outcome Phone Priority	Recurrence Interva Related To Repeat This Task Status	I Subject Type	
Task Sample								
Highlights Panel			1					
Customize the highligh	ts panel for this page la	ayout						
Publisher Actions	i							
Post File	Link Poll	New Task	Log a Call	New Event Ec	lit Comments	Change Date	Change Status	Change Priority
Task Detail				Standard Buttons Edit Delete Delete Serie	es Create Follow-	Up Task Create Follow-U	Custom B	luttons
Task Information (Hea * Assigned To * Subject Due Date Phone Call Start Call Duration Call Call Duration	der visible on edit only Sample User t Sample Subject 26/01/2015 14:05 1-415-555-1212 26/01/2015 14:05 7 090 Sample Call Result	entre N				* • • R	● Status Sample ● Name <u>Sample</u> elated To <u>Sample</u>	Status <u>Contact</u> <u>Contract</u> mple@company.com
outcome	 Sample outcome 	Callee						



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+)							ustomize 🔻	
			d Prev	/ious Page (1-25) <u>Next Page</u> ₽			
Action	Subject	Name	Related To	Outcome	Call Start ↓	Callee	Caller	Call Duration
Edit	Call to 33690670912				07/01/2015 18:20	33690670912	<u>33172387716</u> 📞	18
Edit	Call from 33666062561				07/01/2015 18:14	33172387716	<u>33666062561</u> 🍾	24
Edit	Call from 33661670912			client answered	07/01/2015 18:06	33172387716	<u>33661670912</u> 🍾	74
Edit	Call to 33651062561	piste 52, test		client answered	06/01/2015 14:48	<u>33651062561</u> 🍾	<u>33172387216</u> 📞	3

You are ready to use the Keyyo Unify App!



3 Tune Keyyo Unify

Go back to "Keyyo Unify Administration" page.

Pick where the call outcome should be saved :	Task custom field : Outcome ▼
Save the due date :	Yes T
Automatic task creation:	Enabled (default)
Save	

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.