



**MCPHS**  
UNIVERSITY

## Avaya Phone System Salesforce Add-In

Help Desk, Information Services

Tel: (617) 732-2170

[helpdesk@mcphs.edu](mailto:helpdesk@mcphs.edu)

# 1 AVAYA INTEGRATION WITH SALESFORCE

---

## 1.1 SIGNING INTO THE ADD-IN

1. To sign into the add-in all that is required is your extension, enter your four-digit extension and click the blue arrow to continue.
2. When you sign into the add-in, you'll see the off-call state of the add-in.



Icon 1: Dial Pad to place a call  
Icon 2: Redial

My Calls Today: Opens a Salesforce call log report for your extension.

Last Three Calls: Allows you to directly access the call log entry in Salesforce for that call.

## 1.2 RECEIVING A PHONE CALL

3. When calls come into either the call center line (if your extension is part of the call center group) or your personal direct dial number, the Salesforce integration will recognize the incoming call and will on:
  - 3.1 No matching record: will not pop to any screens.
  - 3.2 A single matching record: pop directly to the callers contact page
  - 3.3 Multiple matching records: pop to a search page you can select the appropriate caller to open.
4. While in a call, the following options become available:



- 1: Answer Call
- 2: Disconnect/Hang-up Call
- 3: Place Call on Hold
- 4: Initiate Call Consult
- 5: Call Transfer
- 6: Conference

5. When a call is answered and the add-in can match to a Salesforce contact, it will pop open to a new tab and change to display more information:

Call Details  
 Caller ID : 6172990167  
 Dialed Num... : Saber, Max

**MaxTest SaberTest**  
 Name : MaxTest SaberTest  
 Mobile : 774 6441542

[My Calls Today](#)  
[Last Three Calls](#)

Call Log Details  
 Subject: 2018-01-14 15:1  
 Name: MaxTest  
 Related To: None  
 Comment... Enter call notes here BEFORE the call ends.

Call Details:  
 Incoming Caller ID Number  
 Incoming Caller ID Name

Link to Salesforce Record  
 Contact/Account Full Name  
 Contact/Account Primary Number

Call Log Details  
 Subject: Always defaults to date and time of call  
 Name: Default contact/account name is selected  
 Related To: not used in our environment  
 Comment: Enter notes about the call while on the line.

**The call log entry is automatically saved when you hang up.**

6. When the call ends you can click **Last Three Calls** then select the call you just completed, this will open the task/call log record that was created in the contact's record for you to add additional information.

**Task**  
 2018-01-14 15:19:43

Click to add topics: ?

1 7 31

Attachments [0]

**Task Detail** Edit Delete Create Follow-Up Task Create Follow-Up Event

▼ **Task Information**

Assigned To	Max Saber	Related To	
Type	Call	Name	<a href="#">MaxTest SaberTest</a>
Call Type	Inbound		
Subject	2018-01-14 15:19:43	Status	Completed
Call Duration	65	Priority	Normal
Due Date	1/14/2018	Call Result	
Comments	Enter call notes here BEFORE the call ends.		

▼ **Additional Information**

Phone	Caller	<a href="#">6172990167</a> 📞
Email	Called	<a href="#">2811</a> 📞
	UCID	00027093661515961183

▼ **System Information**

Created By	<a href="#">Max Saber</a> , 1/14/2018 3:20 PM	Last Modified By	<a href="#">Max Saber</a> , 1/14/2018 3:20 PM
------------	---	------------------	---

**Reminder**

Reminder

### 1.3 PLACING CALLS WITH THE AVAYA/SALESFORCE ADD-IN

7. From the Contact record click the green telephone icon near the number you'd like to dial



8. The applet will bridge the outgoing phone call to your desktop set, when the desktop handset starts ringing pick up the handset and the call will be placed to the number you selected to dial. Outbound calls are logged in the same manner as inbound calls above.