

Avaya Phone System Salesforce Add-In

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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

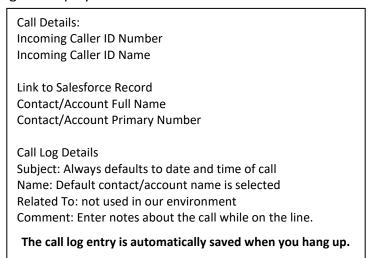
- 3. When calls come into either the call center line (if your extension is part of the call center group) or your personal direct dial number, the SalesForce integration will recognize the incoming call and will on:
 - 3.1 No matching record: will not pop to any screens.
 - 3.2 A single matching record: 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:



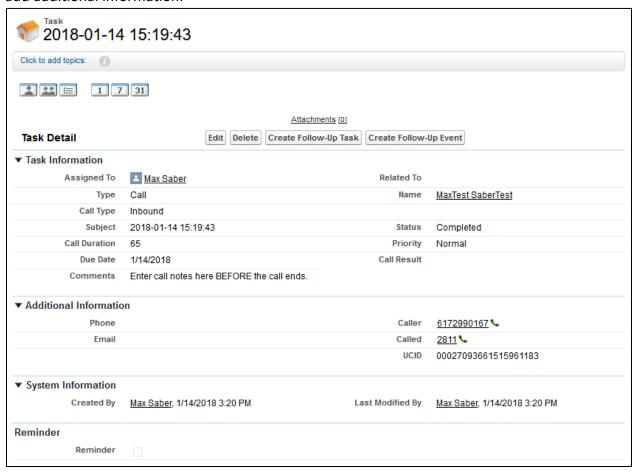
- 1: Answer Call
- 2: Disconnect/Hang-up Call
- 3: Place Call on Hold
- 4: Initiate Call Consult
- 5: Call Transfer
- 6: Conference

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:





 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.



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.