



## **FIBERME Communications LLC.**

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FCM630A Series IP PBX - Salesforce CRM Integration Guide

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## INTRODUCTION

Customer relationship management (CRM) is a set of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle, with the goal of improving business relationships with customers.

The FCM630A series supports several CRM API, allowing users to get full information about their contacts, customers and leads, and save call information details to specific table history for further usage.

This guide contains a step-by-step configuration needed to set up Salesforce CRM with the FCM630A.



# FCM630A CONFIGURATION

The FCM630A series allow the following features using Salesforce CRM:

- Querying
- Updating
- Adding CDR records through Salesforce APIs (SOAP or REST)

Two steps are required to configure FCM630A with Salesforce CRM:

1. **Admin Configuration.**
2. **User Configuration.**

## Admin Configuration

This step is required to configure received calls, add contact phone number, Contact Lookups... These settings will apply to all users on this FCM630A using Salesforce CRM platform.

Salesforce configuration page can be accessed using admin login at **“Web GUI→Value-Added Features→CRM”**.

CRM

CRM System:

\* Add Unknown Number:

Contact Lookups:


<input type="checkbox"/> 0 item	Available		<input type="checkbox"/> 3 items	Selected
	None	<	<input type="checkbox"/> Look up in Contacts ta...	
		>	<input type="checkbox"/> Look up in Leads table	
		↑	<input type="checkbox"/> Look up in Accounts ta...	
		^		
		↓		
		⇩		

Figure 1: Salesforce Settings


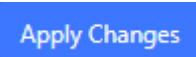
1. Select **Salesforce** from the “CRM System” dropdown list to use the Salesforce CRM and make similar configuration to the above, below are the details:



**Table 1: Salesforce Settings**

<b>CRM System</b>	Allows users to select a CRM system from the drop-down list, choose Salesforce to use Salesforce CRM.
<b>Add Unknown Number</b>	Allows to automatically save received calls from numbers not previously logged in Salesforce CRM and add contact phone number to specific table (Contacts, Leads...).
<b>Contact Lookups</b>	Selects CRM tables that will be used to lookup for contact details when making/receiving calls. Press  to select where the FCM can perform the lookups on the CRM tables


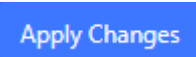
Once users finish configuring above settings using admin access:

2. Click on  and .
3. Logout from admin access.

## User Configuration

This configuration is per user, it will allow users to authenticate and sync up with Salesforce CRM platform.

**Note:** Admin Configuration needs to be set before enabling CRM for users.

1. Access to the FCM web GUI as user and go to “User Portal→**Value-added Features**→**CRM User Settings**”.
2. Click on “**Enable CRM**”.
3. Enter the **username**, **password** and **Security Token** associated with your Salesforce CRM account.
4. Click on  and .

The status will change from “Logged Out” to “Logged In” and users can start using Salesforce CRM.



CRM User Settings

Save
Cancel

Enable CRM:

\* Username:

\* Password:

\* Security Token:

Login Status: Logged In

Figure 2: CRM User Settings

Table 2: CRM user settings

<b>Username</b>	Enter Salesforce username to login.
<b>Password</b>	Enter Salesforce Password to login.
<b>Security Token</b>	Enter security token of your salesforce account.

## SALESFORCE CONFIGURATION

On the Salesforce Web page:

1. Access the Salesforce app launcher and navigate to "Reports" as displayed on following figures.



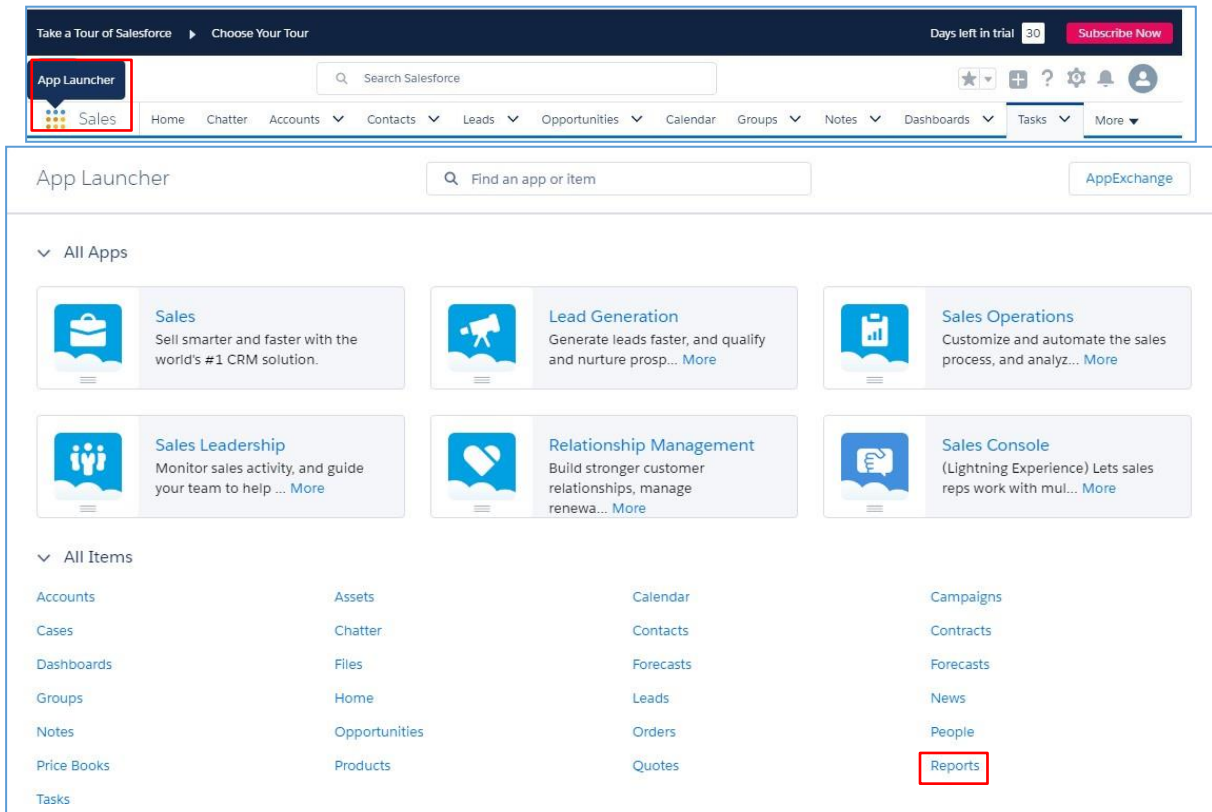


Figure 3: App Launcher

2. Click on “New Report” as shown on below figure.

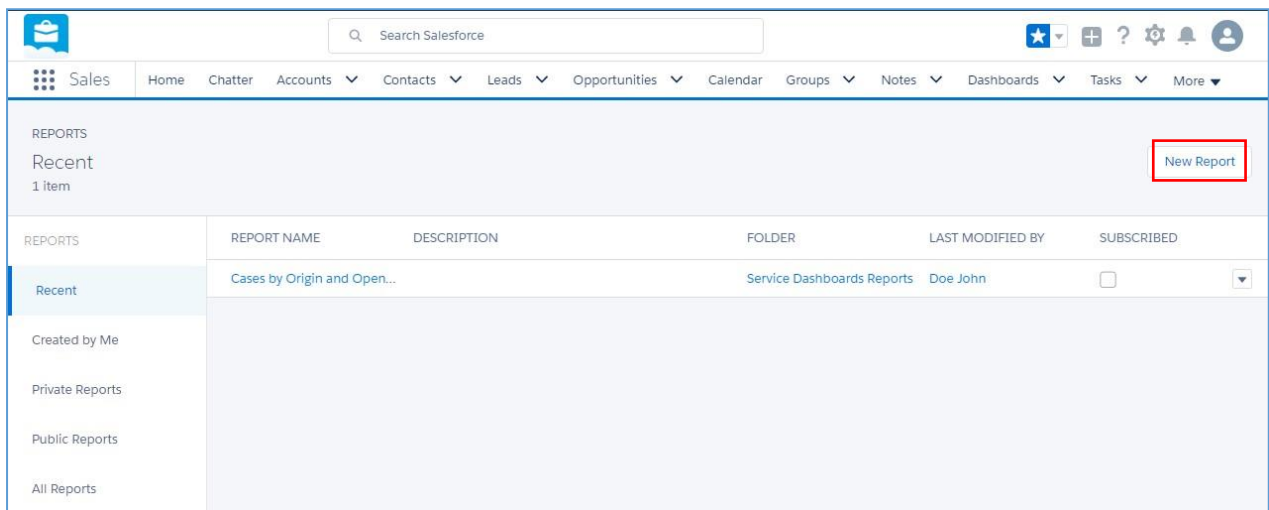


Figure 4: Create New Report

3. On the “Report Type” dropdown select “Activities > Task and Events” report, then click on “Create” as displayed on the following screenshot.



**Activity Report**

Count	Activity Type				
Assigned	Cold Call	Email	Meeting	GRAND TOTAL	
Joe Johnson	25	15	7		47
Shelly Smith	37	22	4		63
Tom Thompson	19	9	9		37
<b>Grand Total:</b>	<b>81</b>	<b>46</b>	<b>20</b>		<b>147</b>

Figure 5: Task and Event Report

4. In “Show” dropdown list, select “Open & Complete Activities” then click on “Save”.
5. On the “Preview window, a list of inbound/outbound calls will be shown.





The screenshot shows the Salesforce Report Builder interface. At the top, there's a search bar and navigation tabs for Sales, Home, Chatter, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and More. Below this, the report is titled "Unsaved Report" with a sub-header "Report Type: Tasks and Events". A toolbar contains "Save", "Save As", and "Close" buttons, along with a "Report Properties" icon. The "Fields" section on the left lists various activity-related fields like "Assigned", "Subject", "Date", "Duration", etc. The "Filters" section at the top right shows a filter for "My team's activities" and a date field set to "Date". A dropdown menu is open, showing options: "Open Activities", "Completed Activities", and "Open & Completed Activities", with the last option highlighted by a red box. The "Preview" section displays a table with 7 records of activity data.

Assigned	Subject	Date ↑	Priority	Status	Task	Company / Account	Contact	Lead	Opportunity
Doe John	UCM Outbound Call from 1400	16/02/2017	Normal	Completed	✓	-	06264864415	-	-
Doe John	UCM Outbound Call from 1400	16/02/2017	Normal	Completed	✓	-	06264864415	-	-
Doe John	UCM Outbound Call from 1400	16/02/2017	Normal	Completed	✓	-	06264864415	-	-
Doe John	UCM Inbound Call to 1000	22/02/2017	Normal	Completed	✓	-	2000	-	-
Doe John	UCM Outbound Call from 1000	22/02/2017	Normal	Completed	✓	-	2000	-	-
Doe John	UCM Inbound Call to 1000	22/02/2017	Normal	Completed	✓	-	2001	-	-
Doe John	UCM Outbound Call from 1000	22/02/2017	Normal	Completed	✓	-	2001	-	-

Figure 6: Report Preview

- Once you click "Save", a "Save Report" window popup to set a name for the newly created report, fill the information and click on "Save".



**Save Report**
Help for this Page ? x

Report Name

Report Unique Name  i

Report Description

Report Folder  ▼

Save Hierarchy Level  i

Your report is set to show data from the Hierarchy level of: "Doe John"

Figure 7: Save Report

Whenever users need to check call logs on Salesforce web page, they need to navigate to “Reports” and click on the created report for tasks and events.

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY	SUBSCRIBED
Recent	Call Log Report	Report Showing Call Logs	Private Reports	Doe John	<input type="checkbox"/>
Created by Me	FirstCall		Private Reports	Doe John	<input type="checkbox"/>
Private Reports					
Public Reports					
All Reports					

Figure 8: Call Log Report

