

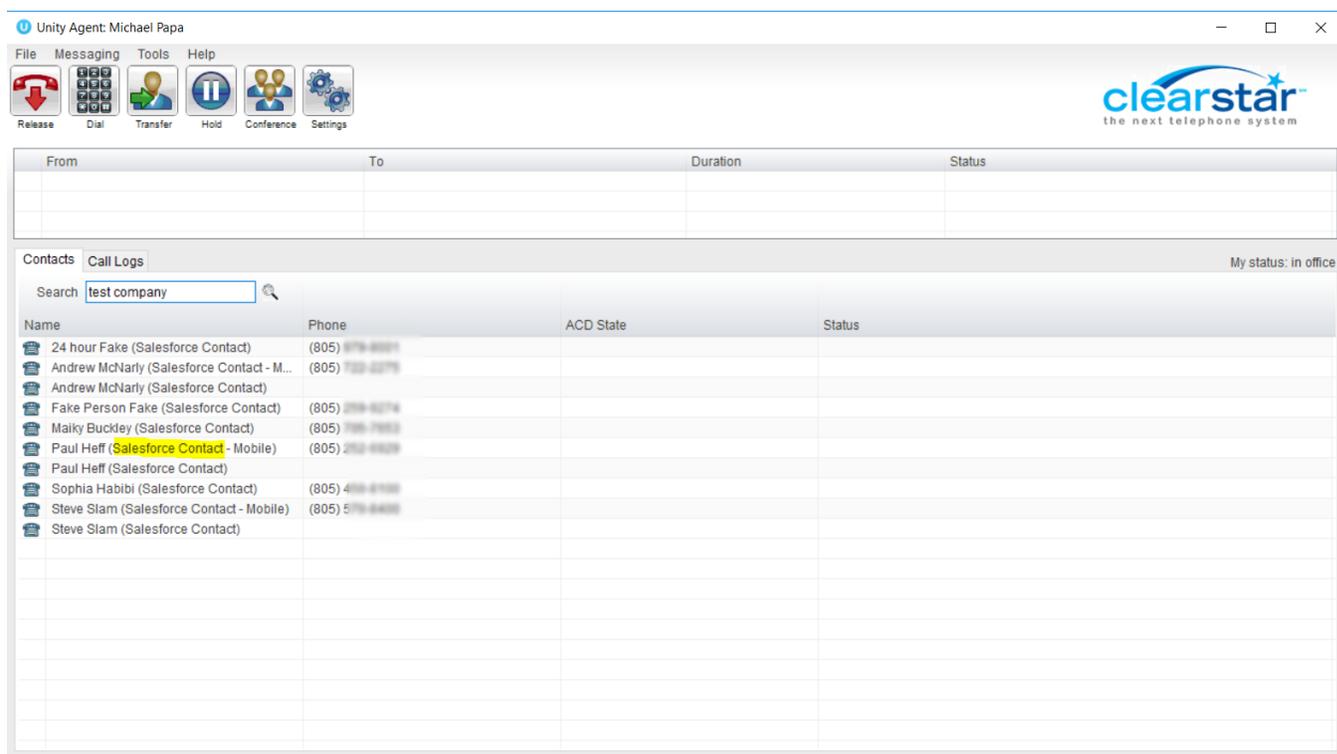
Unity-Salesforce Integration User Guide

Overview

ClearStar™ Salesforce Connector makes it easy to log calls directly into Salesforce. A screen pop, triggered by a call, allows notes to be added from a desktop client and automatically log all calls. These automatic logs also make it easy to run call reports through Salesforce later on.

Placing a call through Unity

Placing a call through Unity can be accomplished two different ways. The first option includes clicking the **Dial** button in the top toolbar, entering the target number, and clicking **OK**. If the target number is in Salesforce, begin by searching for the desired contact or contact's company in the **Search bar**. As shown in the image below, a list of related contacts will populate with the "Salesforce Contact" indicator to the right of the contact's name. Once the contact is located, double click the contact's name, or number, to place the call.



The screenshot shows the ClearStar Unity interface. At the top, there is a toolbar with icons for Release, Dial, Transfer, Hold, Conference, and Settings. Below the toolbar is a table with columns for From, To, Duration, and Status. Underneath is a 'Contacts' section with a search bar containing 'test company'. The search results are as follows:

Name	Phone	ACD State	Status
24 hour Fake (Salesforce Contact)	(805) 979-8881		
Andrew McNarly (Salesforce Contact - M...)	(805) 752-2275		
Andrew McNarly (Salesforce Contact)			
Fake Person Fake (Salesforce Contact)	(805) 259-8274		
Maiky Buckley (Salesforce Contact)	(805) 796-7853		
Paul Heff (Salesforce Contact - Mobile)	(805) 262-6629		
Paul Heff (Salesforce Contact)			
Sophia Habibi (Salesforce Contact)	(805) 410-8168		
Steve Slam (Salesforce Contact - Mobile)	(805) 513-8488		
Steve Slam (Salesforce Contact)			

Accepting a call

Similarly to placing a call, there are several ways to accept a call through Unity:

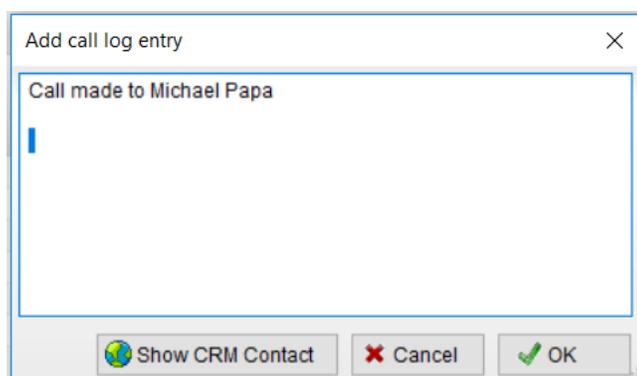
1. Pick up the handset
2. Pressing the green **Answer** button in the top ribbon (the red **Release** button changes to a green **Answer** button when a call is coming in).
3. Click-to-dial, which just involves clicking on a phone number in web browser to initiate a call. (There will be a verification pop-up the first time a click-to-dial call is made. By checking the box in the pop-up, this verification pop-up will no longer present itself).
4. Clicking on the toaster that pops up in the bottom left corner of the screen (depicted below).



Opening a Salesforce Notes

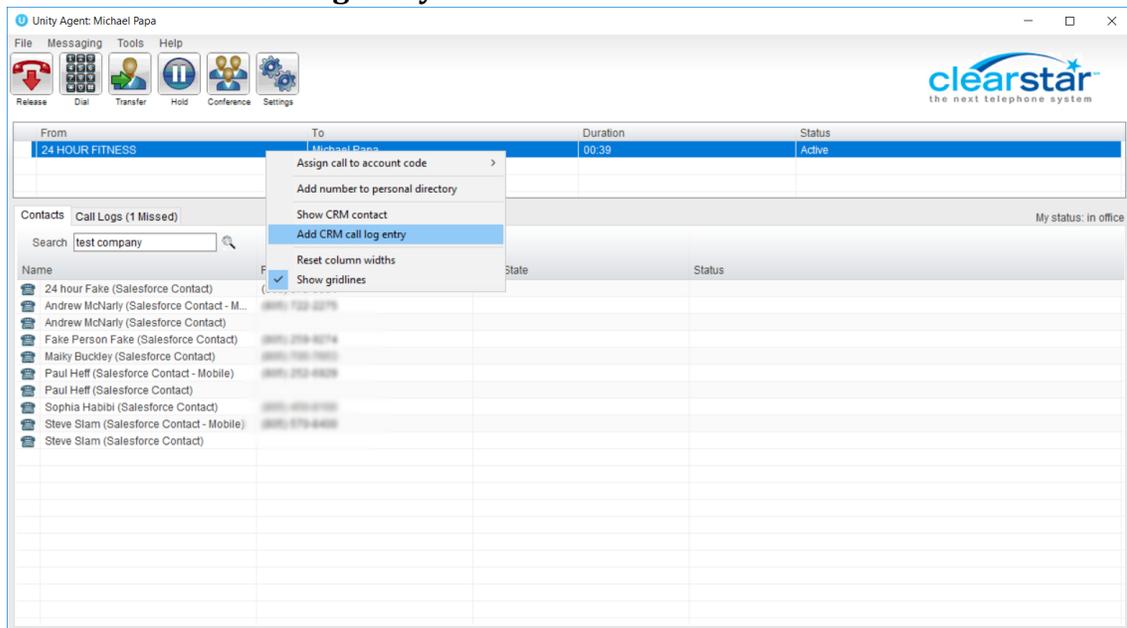
Additionally, there are several ways to view and add notes to Salesforce contacts.

1. To open a CRM Entry popup, like the one shown below, there are two methods:



- a. Click on the small box in the bottom right of the toaster when a call is coming in, or

- b. Right click on the “call in progress” in the top section of Unity and selecting **Add CRM call log entry**.



2. To open a contact in Salesforce, right click on a Salesforce contact, and select **Show CRM contact**, as shown below.

