

# Unity-Salesforce Integration Setup

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## **Downloading Unity Client**

1. Go to: [http://impulse.net/support/clearstar-phone-system/clearstar-unity/unity-install-files/?doing\\_wp\\_cron=1518722477.8940711021423339843750](http://impulse.net/support/clearstar-phone-system/clearstar-unity/unity-install-files/?doing_wp_cron=1518722477.8940711021423339843750)
2. Choose the desired Unity Desktop install file
3. Complete the install wizard to download Unity
4. Open **Unity Client**
5. If it does not prompt you with a login window, go to **Settings**, then down to **Authentication**, and enter your credentials:
  - a. Login ID: [impXXXXXXXXXX@impulsevoip.net](mailto:impXXXXXXXXXX@impulsevoip.net)
  - b. Password: (Web portal password)
6. Check **Remember my login ID** and **Remember my password**
7. Press **OK**

## **Connecting to Salesforce**

1. Start by getting your **Security Token** from Salesforce
  - a. This should be searchable from the salesforce search bar, but also found under **setup**.
2. From the **Unity Client**, go to **Settings**
3. Click the **Settings** tab
4. Navigate to **CRM**
5. From the CRM Platform Dropdown, select **Salesforce**
6. Enter your **Salesforce credentials** and **Security Token** and press **Test**
7. Once the test is successful, check all boxes
8. Select the **Automatic Contact Pop** tab and choose the desired settings:
  - a. For automatic popups for all inbound calls, check the following two boxes under **Everytime I answer an inbound call**
    - that is through a call center
    - that is not through a call center
  - b. For automatic popups for all outbound calls, check the following two boxes under **Everytime I make an outbound call**
    - that is through a call center
    - that is not through a call center
9. Back in the left Settings ribbon, navigate to **Click To Dial**
10. **Configure Unity click to dial now**
11. Click **OK**

## Updating Unity User List

1. Right click anywhere in the user list
2. Choose **Manage User List**
3. Customize user list by adding desired users to the right column

The screenshot shows the Unity Agent interface for Michael Papa. The top navigation bar includes File, Messaging, Tools, and Help. Below this are icons for Release, Dial, Transfer, Hold, Conference, and Settings. The Clearstar logo is in the top right corner. The main area is divided into a call log table and a contacts list. The call log table has columns for From, To, Duration, and Status. The contacts list has columns for Name, Phone, ACD State, and Status. A context menu is open over the contact Ian Neal, with 'Manage user list' highlighted. The menu also includes options like Call extension, Call mobile, View user details, Instant message, Send email, Copy number, Copy mobile, Personal directory, and Appearance.

From	To	Duration	Status

  

Name	Phone	ACD State	Status
Alicia Canto	8058846351	Sign-Out	
Amanda Ruiz	8058846387	Available	
Bruce Woode	8058846327		
Cesar Perez	8058846305	Sign-Out	
Chris Binns	8058846302		
Chris Rose	8058846368	Available	
Christopher Waytek	8058846376	Available	
Cristian Small	8058846316	Available	
Dane Allen	8058846388	Unavailable	
Daniel Luna	8058846338	Sign-Out	
Dave Clark	8058846339		
<b>Ian Neal</b>	<b>8058846383</b>	<b>Available</b>	
Jay Hennigan	8058846323		
Jessie Bryan	8058846317		
Justin Maness	8058846318		
Justin Thompson	8058846356	Sign-Out	
Large Conference Room	8058846394		
Lee Carlander	8058846364	Available	
Lucas Walker	8058846397	Sign-Out	
Lynda Radtke	8058846396		