

# Salesforce integration



## User manual

8/14/2019

### Product line neo, version 6.x

The described functions can be used with the following ASC products:

EVOIPneo

EVOLUTIONneo / XXL / eco

INSPIRATIONneo

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## General information

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## 2 Introduction

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### 2 Introduction

The Salesforce application for ASC can be used to link a recording to Salesforce objects. You can then use the recordings in different areas, e. g. in customer processes, opportunities, contacts, leads, and accounts.

Users can deploy the recordings within the Salesforce interface for any object. Depending on the configured authorizations in the ASC System Configuration, users can control the recording by means of the recording options in the *ASC Recorder*.

### 3 User interface and general functions

1. Log in to the Salesforce app with your ASC user account.
2. There are different options to use the app; select the tab *Accounts*, for instance.
3. Select the respective account to go to the detail view.

The ASC Recorder offers a recording menu with different functions:

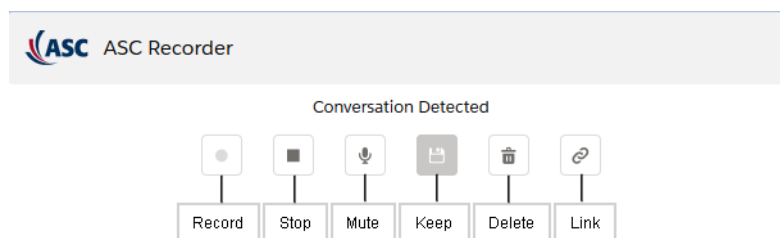


Fig. 1: ASC Recorder - icons

The following options depend on the configuration and authorizations that the respective user has been given in the System Configuration of ASC.

<i>Record</i>	Records the conversation
<i>Stop</i>	Stops the recording
<i>Mute</i>	Toggle button mutes or unmutes the recording
<i>Keep</i>	Keeps the recording
<i>Delete</i>	Discards the recording
<i>Link</i>	Links the recording to the currently opened object

**NOTICE!** Without an active conversation, the icons are disabled.

If there is a conversation for the logged-in user, the information *Conversation Detected* is displayed.



Fig. 2: Conversation detected

If the Recording Planner in the System Configuration has been configured accordingly, the recording starts as soon as a conversation is detected.

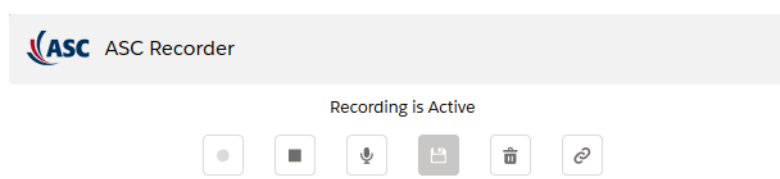


Fig. 3: Recording is running

The following options are available to control the recording.

#### Mute recording

1. Click on the icon *Mute* to mute the recording.
  - ⇒ The information *Recording Muted* is displayed.

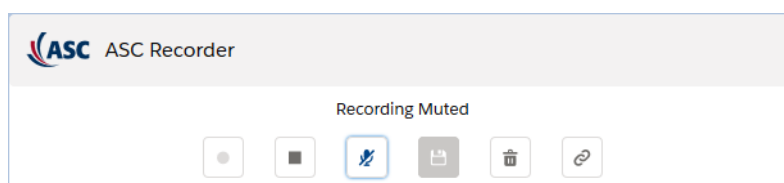


Fig. 4: Mute recording

- To unmute a recording, click on the icon *Mute* again.  
⇒ The information *Recording is Active* is displayed again.

### Stop and start recording

- Click on the icon *Stop* to stop the recording.  
⇒ The information *Recording Stopped* is displayed.

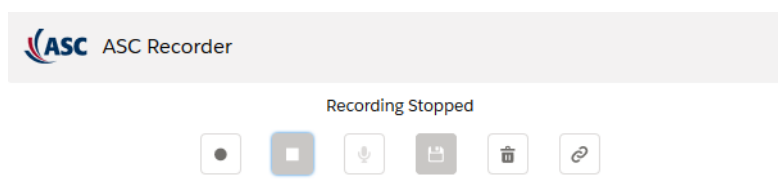


Fig. 5: Recording stopped

- To start the recording again, click on the icon *Record*.

### Keep recording

- Click on the icon *Keep* to keep the recording on the server.

### Delete recording

- Click on the icon *Delete* to discard the recording.

### Link recording

- Click on the icon *Link* to link the recording with the currently opened object.  
⇒ Once the conversation has been finished, the name of the linked recording appears in the section *Recordings*.

### Replay recording

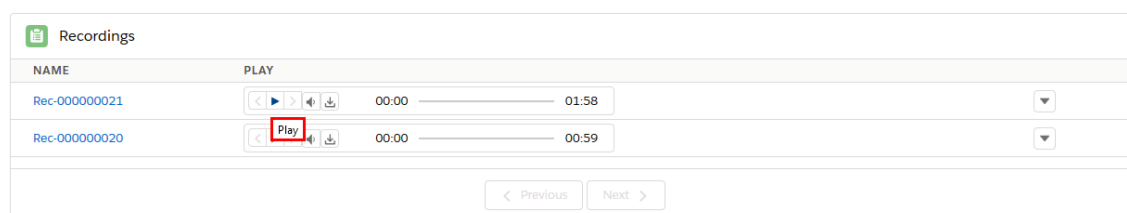


Fig. 6: Replay recording

- Click on the icon *Play* to replay the recording.

### Link subsequently

The list of available recordings also contains recordings which have not yet been linked. The period from which recordings are supposed to be displayed can be configured in the *ASC User Management*. For more information about the configuration refer to the administration manual for tenants *Salesforce integration*.

- To link a recording with an object, click on the button *Link Recordings* at the end of the respective row in the list *Available Recordings*.

⇒ That way, the recording is linked with the active object.

Available Recordings			
DIRECTION	DATA START	PHONE NUMBER	
INBOUND	07.08.2019 09:18:15	+4968184496846	<a href="#">Link Recordings</a>
INBOUND	07.08.2019 08:56:22	+4968184496846	<a href="#">Link Recordings</a>
INBOUND	07.08.2019 08:51:25	+4968184496846	<a href="#">Link Recordings</a>
INBOUND	06.08.2019 15:26:55	+4960215001337	<a href="#">Link Recordings</a>
INBOUND	06.08.2019 14:15:51	+491743131117	<a href="#">Link Recordings</a>
INBOUND	16.07.2019 11:02:24	+4960215001223	<a href="#">Link Recordings</a>
INBOUND	16.07.2019 11:02:01	+4960215001223	<a href="#">Link Recordings</a>
INBOUND	10.07.2019 14:29:31	+4960215001223	<a href="#">Link Recordings</a>
<div> <a href="#">&lt; Previous</a> <a href="#">Next &gt;</a> </div>			

Fig. 7: List of all available recordings

### Delete link

- To remove the link of a recording with the active object, open the drop-down list at the end of the row and click on the menu item *Delete*.

⇒ The link is removed from the list.

Verwandt
Details
Nachrichten
**ASC Recording**

Recordings

NAME	PLAY
Rec-000000019	<div> <div> <div>&lt;</div> <div>&gt;</div> <div>&lt;&gt;</div> <div>⏮</div> <div>⏭</div> </div> <div>00:00 ————— 04:03</div> <div> <div>⏮</div> <div>⏭</div> <div>⏮</div> <div>⏭</div> </div> </div>

< Previous

Next >

▼

Delete

Fig. 8: Delete link

### Log out

To log out, click on your profile image in the top right corner.

Select the option *Log Out* from the context menu.



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## Glossary