

Salesforce integration



User manual

3/18/2021

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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1

General information

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2 Introduction

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*.

User interface and general functions

1. Log in to the Salesforce application with your ASC user account.
⇒ The window to enter the Credential Settings opens.



This setting must be configured for every user who has been assigned an extension in the *neo* application and who is supposed to deploy ASC Recording in the Salesforce application. In case of missing information, contact your administrator.

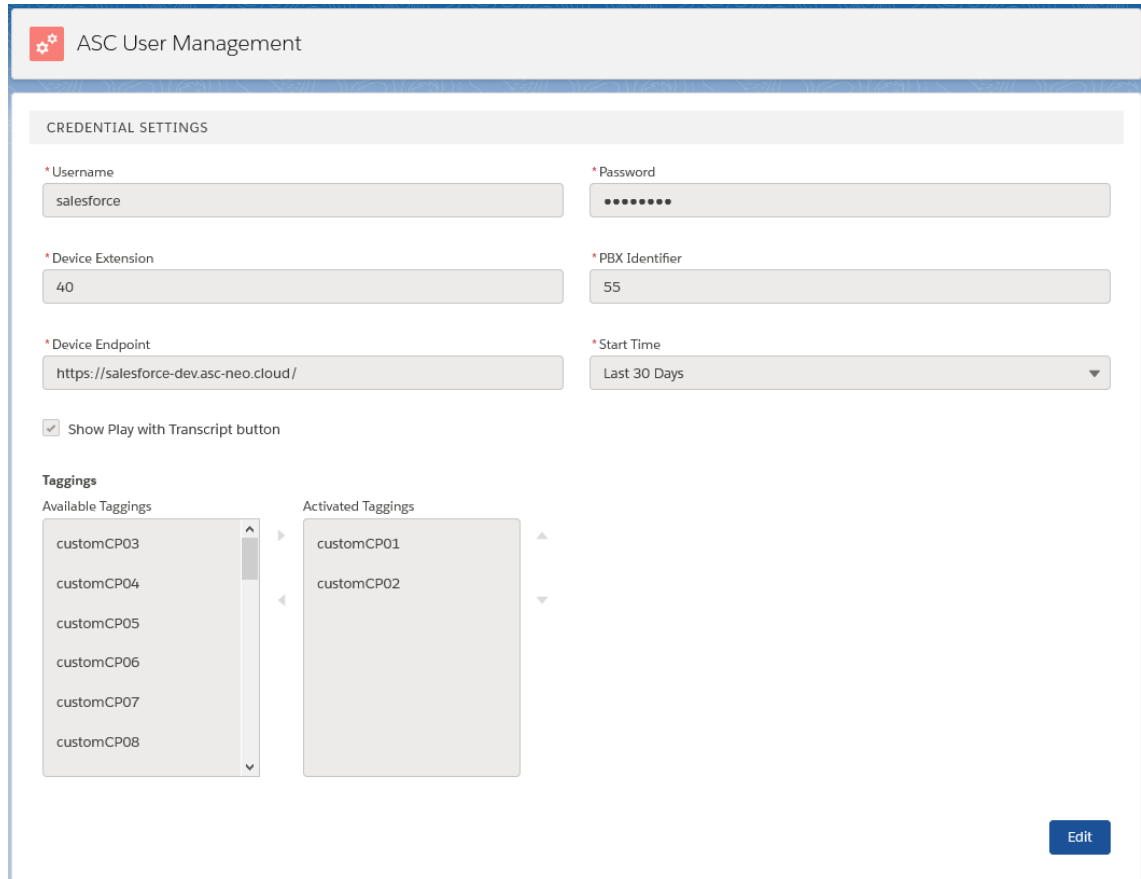


Fig. 1: Salesforce application - Configure ASC User Management

2. Click on the button *Edit* to edit the parameters.

Credential Settings

1. Enter the following parameters:

Username	Enter the user name of the tenant for which the Salesforce integration has been set up on the recording server.
Password	Enter the password to access the ASC recording server.
Device Extension	Enter the extension of the recording server, in the example 40.
PBX Identifier	Enter the PBX Identifier which has been configured for the recording server in the ASC application System Configuration in the PHONEapp module, in the example 55. If information is missing, contact your system administrator.
Device Endpoint	Enter the URL that is used to call up the application. You can use the IP address or an DNS name, in the example https://salesforce-dev.asc-neo.cloud. If information is missing, contact your system administrator.

Start Time Enter the period of time from which you would like to display conversations from the application.



The *neo* system requires a signed [SSL](#) certificate from a root certifying authority; otherwise it will not be possible to establish a connection between Salesforce and the recording server. The operator of the *neo* must have the certificate issued for the respective DNS name and install it on the recording server with the certificate import tool. The DNS name for the *neo* system for which the certificate has been issued must be used as an end device in the Salesforce configuration.

Play with Transcript

☒ **Show Play with Transcript** When activating this check box, the button for transcription is displayed in your account in the tab *ASC Recordings*. This allows replaying the audio and displaying the content of a recording as text.







Recordings				
NAME	PLAY	TAGGINGS	TOPICS	
Rec-000000054	  00:00 — 00:08	Customer number: anotherTaggingTest	Play with Transcript	
Rec-000000049	  00:00 — 00:30	Customer number: customerNumber customCP02: cp02	Play with Transcript	
<div> < Previous Next > </div>				

Fig. 2: Transcription button in the tab Accounts - ASC Recordings

Configure taggings

1. In the list *Available Taggings*, select the required fields and add them to the list *Activated Taggings* by clicking on the arrow keys.
2. Click on the button *Save* to save the configuration.



The displayed available customCP fields depend on the assigned authorization set. If you require additional customCP fields, the administrator must add the authorizations for the corresponding customCP fields for you.

Using the Salesforce application

1. There are different options to use the application; select the tab *Accounts*, for instance.

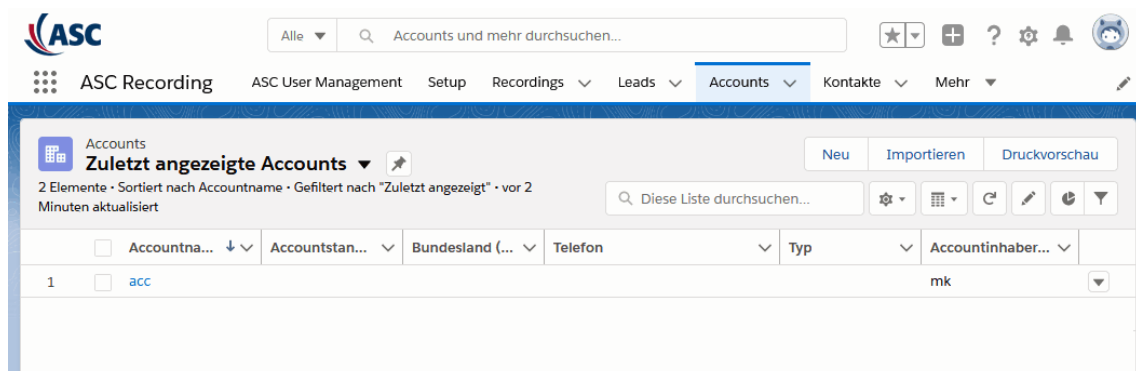


Fig. 3: ASC Recorder - Accounts - list

2. Select the respective account to go to the detail view.
3. Select the tab *ASC Recording*.

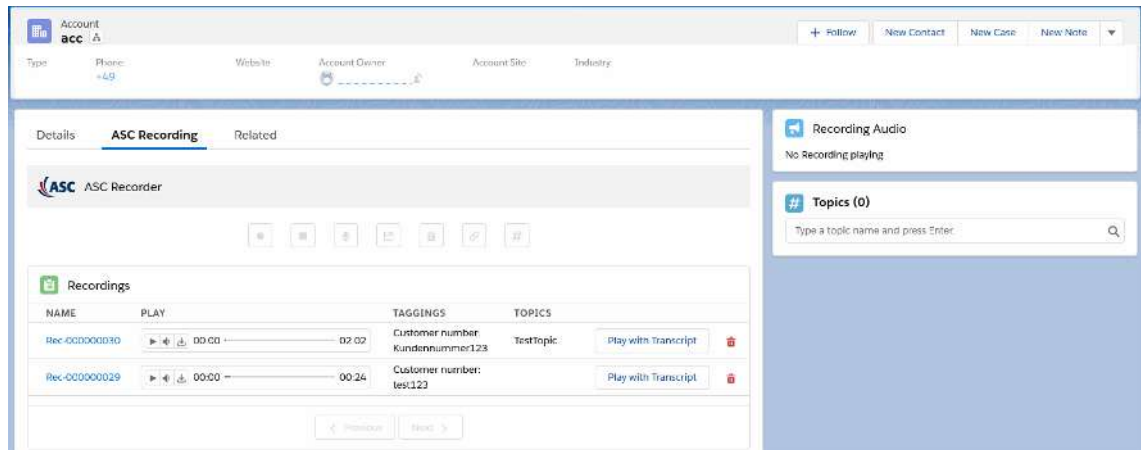


Fig. 4: ASC Recorder - Accounts - tab ASC Recording

The ASC Recorder offers a recording menu with different functions:

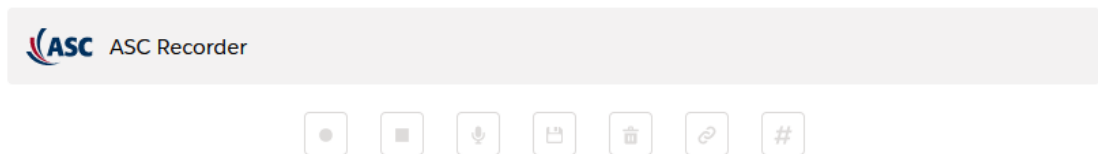


Fig. 5: ASC Recorder - icons

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

The available 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
<i>Tag Call</i>	Tags additional data to the call

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



Fig. 6: Conversation detected

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

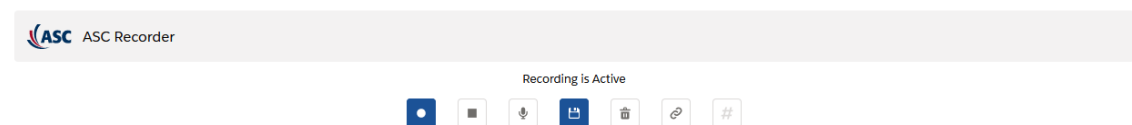


Fig. 7: Recording is active

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.

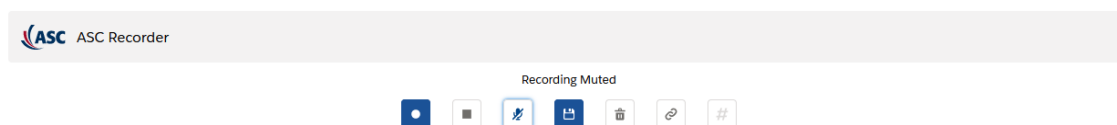


Fig. 8: Recording muted

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

Stop and start recording

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

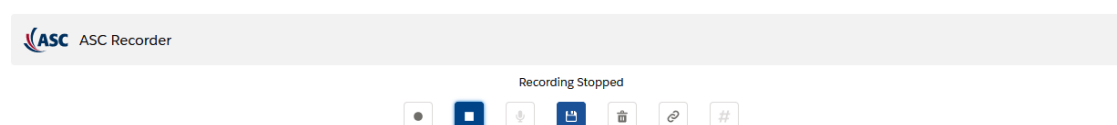


Fig. 9: Recording stopped

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

Keep recording

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

Delete recording

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

Link recording

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

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*.

1. To link a recording to 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 to the active object.

Available Recordings			
DIRECTION	DATA START	PHONE NUMBER	TAGGINGS
INBOUND	27.11.2020, 10:09:59	+49	Link Recordings
<div> < Previous Next > </div>			

Fig. 10: List of all available recordings

Replay recording







Recordings					
NAME	PLAY	TAGGINGS	TOPICS		
Rec-000000030	  00:00 — 02:02	customCP01: Kundennummer123	TestTopic	Play with Transcript	
Rec-000000029	  00:00 — 00:24	customCP01: test123		Play with Transcript	
<div> < Previous Next > </div>					


Fig. 11: Replay recording

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

Load transcript and additional data


If a recording has been linked, you can load the transcript and the additional data of the recording.

1. Click on the button *Load Transcript* in the top right corner to load the transcript.
2. Click on the button *Load Additional Data* in the top right corner to load the additional data.
⇒ The additional data appears in the detail view.


 Recording
Rec-000000030


[Load Additional Data](#)
[Load Transcript](#)

Recording Name
Rec-000000030


Owner



ASC Recording Id
c19fb61d-ded1-4810-aef7-a134a866c5b9

Lead


Contact


Account
acc

Opportunity


Case


Topics
TestTopic

Start Time
16.11.2020, 08:52

Direction
INBOUND

Caller Phone Number
anonymous

Called Phone Number
40

Tagging Information

Customer number
customCP02

Topics (1)

Type a Topic name and press Enter.

TestTopic X

Recording Audio

  00:00 — 02:02

Chat started by

Chat ended by

Fig. 12: Details of the recording

Delete link

An ASC Admin User can delete links between recordings and objects.

1. To remove a link of a recording to an active object, click on the bin icon at the end of the line.
⇒ The link is removed from the list. The recording itself is kept; only the link to this object is deleted.







Recordings					
NAME	PLAY	TAGGINGS	TOPICS		
Rec-000000030	  00:00 — 02:02	customCP01: Kundennummer123	TestTopic	Play with Transcript	
Rec-000000029	  00:00 — 00:24	customCP01: test123		Play with Transcript	
<div> < Previous Next > </div>					

Fig. 13: Delete link to object

Add topics

If the system administrator has authorized you to add topics, you can include the menu in your page layout.

1. Click on the tab *ASC Recording*.
2. Select the menu item *Edit page* in the settings at the top right.

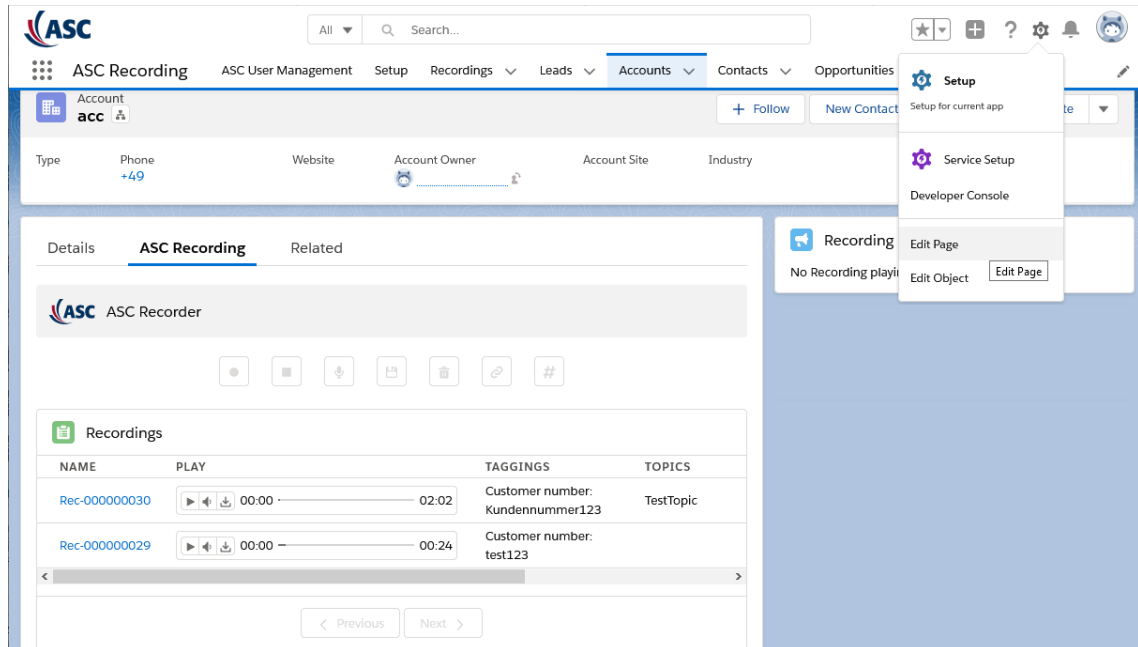


Fig. 14: Page layout - ASC Recording - edit page

⇒ The Lightning App Builder appears.

3. Click on the tab *ASC Recording* in the center window.
4. Select the entry *Topics* in the list of components.
5. Use drag and drop to move the entry to the required menu in the center window.

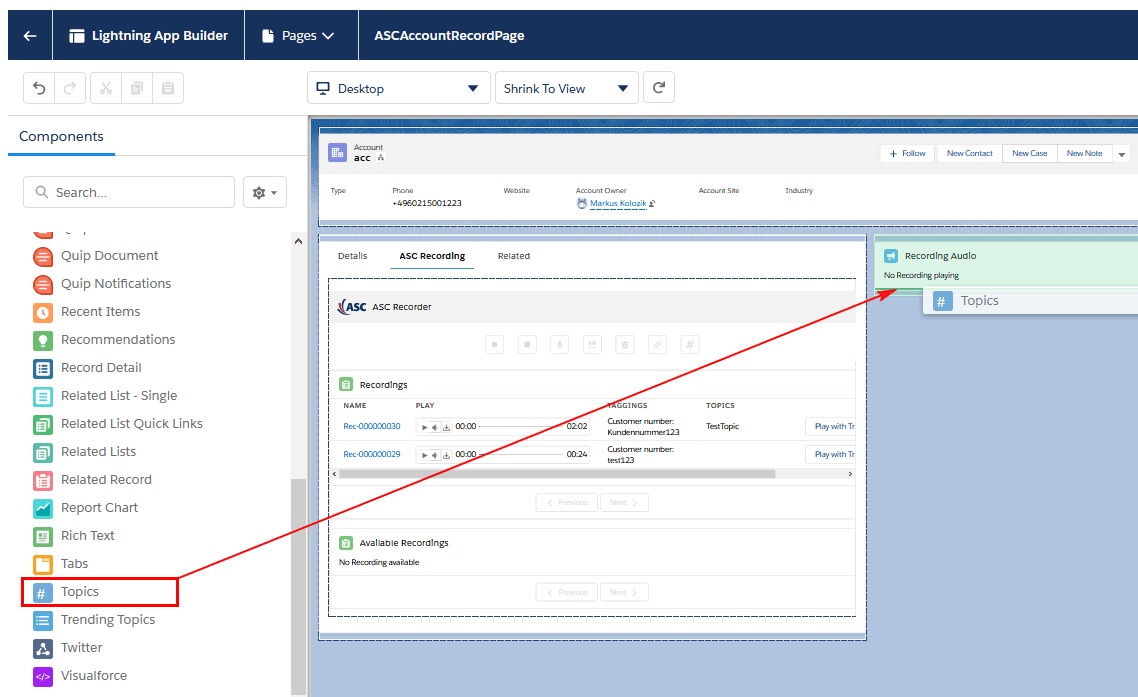


Fig. 15: Page layout - ASC Recording - edit page

6. In the title of the Lightning App Builder, you can see the name of the page layout you are in.

7. Click on the button **Save** at the top right.
⇒ The menu **Topics** now appears in your customized page layout.

Grant account login access

If you have to open a support ticket, activate account login access to ASC Technologies AG-Support.

1. Select the menu item **Settings** above your profile icon.

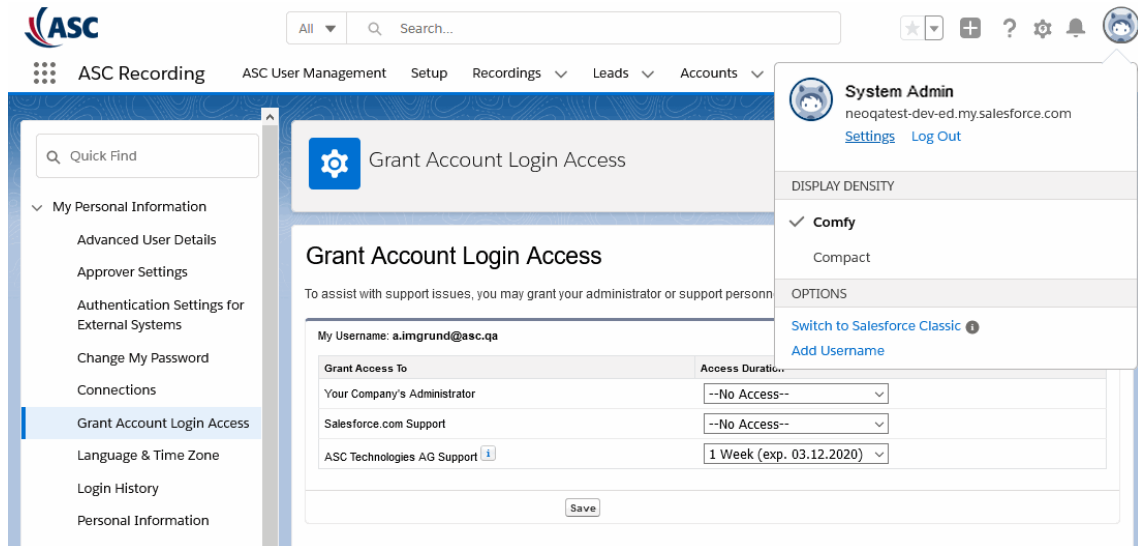


Fig. 16: Grant account login access to ASC Technologies AG-Support

2. Select the menu item **My Personal Information > Grant Account Login Access** in the navigation bar.
3. From the drop-down list in the line **ASC Technologies AG-Support**, select the entry **1 Week** (exp.: xx.xx.xxxx) to grant temporary support for one week.
4. Click on the button **Save** to save the settings.

Log out

1. To log out, click on your profile image in the top right corner.
2. Select the option **Log Out** from the context menu.

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Glossary

SSL

Secure Socket Layer
