

Enhance your Salesforce productivity with Navigate UC

The Navigate UC Salesforce Adapter improves productivity for users of Navigate UC and Salesforce.

The adapter presents a convenient embedded call control window in the Salesforce browser window to allow tight integration between Salesforce and the user's Splicecom handset.

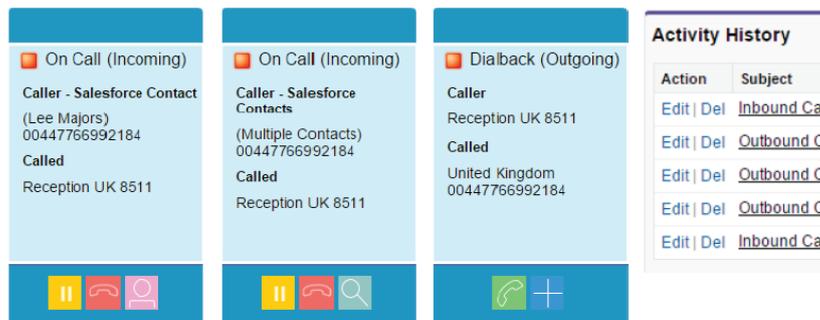
Users can interact with Salesforce to initiate calls, answer calls, and to add new or "pop" existing entities such as Leads, Contacts, Cases etc. using the telephone number of the caller or called party.

Call History records are also written against the selected entities.

The adapter is available as standard with Navigate UC CRM.

Find Callers

When a phone call is received, the adapter will automatically search through all of the records held within Salesforce to find the number that is dialing in. Depending on what it finds, one of three things will happen:



One:
The phone number is found once: The Phone Panel displays a 'pop' button. This button allows the user to open the record that has been found.

Two:
Multiple instances of the phone number are found: The Phone Panel displays a 'search' button. Clicking this button will show the multiple instances found, allowing the user to manually select the correct instance.

Three:
The phone number is not found: The Phone Panel displays the 'new' button. Clicking this button will create and open a new entity with an association to the callers number.

Activity History:
Calls made and received are written to the activity history.

Key Features:



- Create a new Salesforce entity (lead/account/case/etc)
- Pop an existing Salesforce entity
- Click to call
- Write a call record against a Salesforce entity
- Records call duration against call history
- Answer, hold and hang-up the call without leaving Salesforce

Specifications:

- **Operating Systems:**
Windows 7, 8, 10
- **Browser:**
Google Chrome
Mozilla Firefox
- **Navigate UC license type:**
CRM
- **Supported Salesforce Versions:**
Requires Salesforce to be licensed for the "Open CTI" API. Please check at https://developer.salesforce.com/docs/atlas.en-us.api_cti.meta/api_cti/sforce_api_cti_intro.htm or with your Salesforce Account Manager if your version has access to this API. Please note: Lightning interface does not support Open CTI.