mediahawk

Salesforce Integration

Contents

Are there any System Prerequisites?

You must have Salesforce Enterprise Edition or above.

In order to use the screen popping feature you are required to have Departments Setup and assign users to Call Centre within Salesforce.

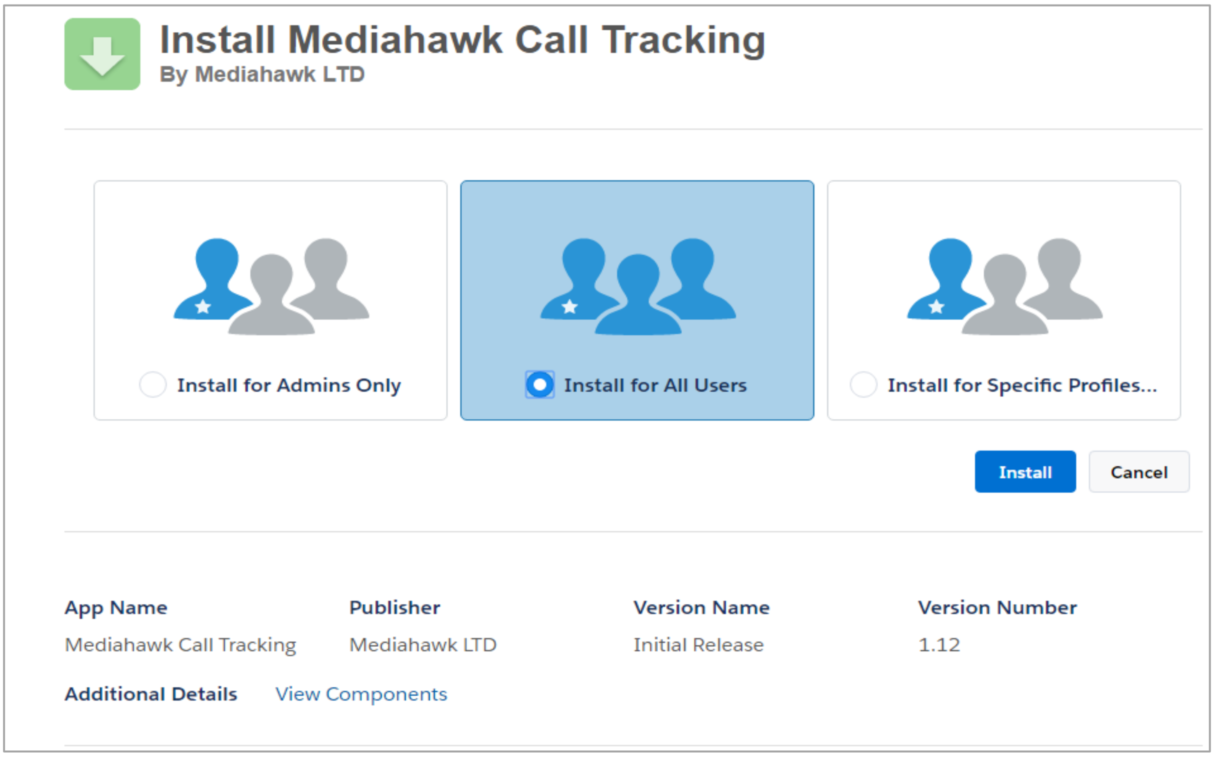
If you have “required” field selected within an Object (IE Lead, Account), it must be a Page Layout requirement, not a single Field requirement. If it is Field setup Mediahawk cannot create new items within the Object (IE Lead, Account)

How do I install the Mediahawk App within Salesforce?

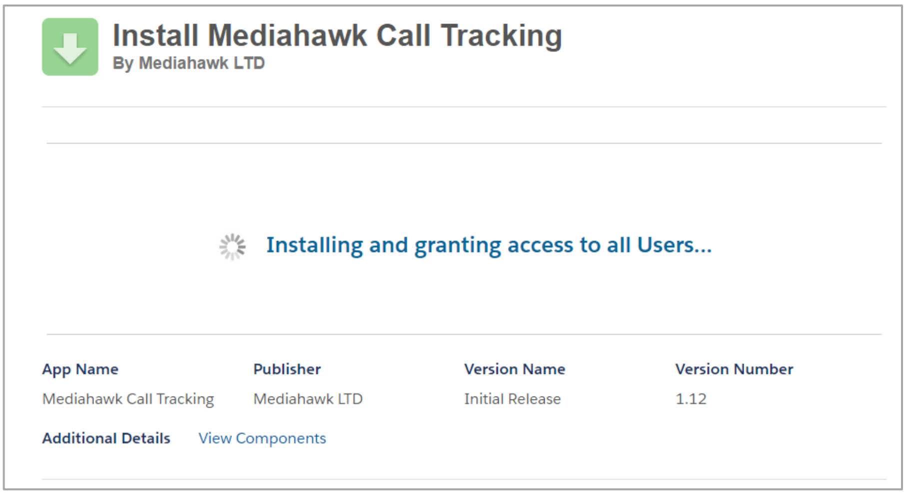
Login to your Salesforce account and then paste the following Web URL into the browser bar

https://login.salesforce.com/packaging/installPackage.apexp?p0=04t58000000kaUZ

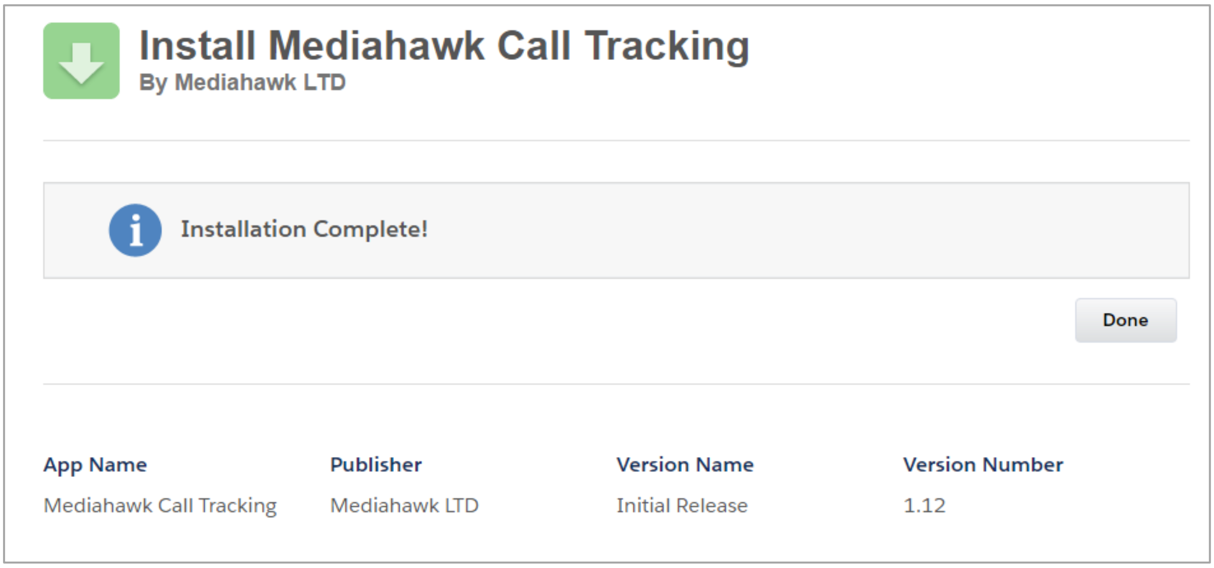
You will be presented with an Install Screen. Select the most appropriate install method (in this example we have selected Install for all users) then click **Install**



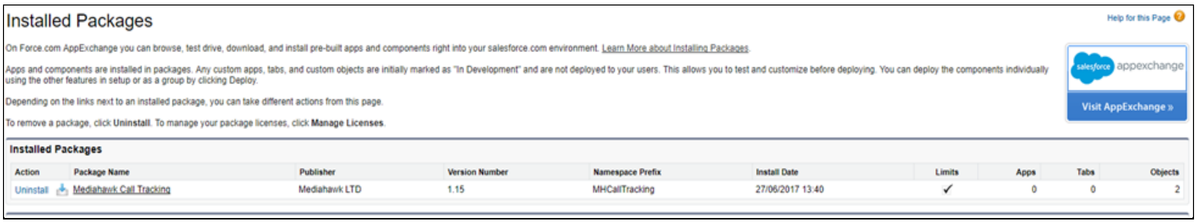
You will continue to see this screen until the installation is complete.



Once complete you will be presented with this screen. Click **Done**



This will then take you to the Installed Packages screen below where you will see the Mediahawk Call Tracking package has been installed.



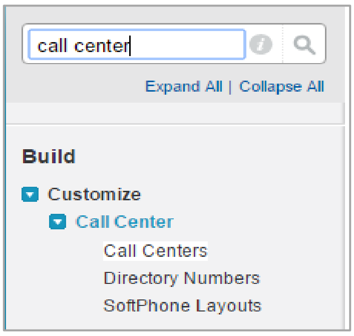
If you are using the screen popping function you will now need to setup the [Call Centre Users]() and [Assign Departments to Users](). If not proceed to [How do I set up the integration in Mediahawk?]()

Setting up Call Centre Users in Salesforce?

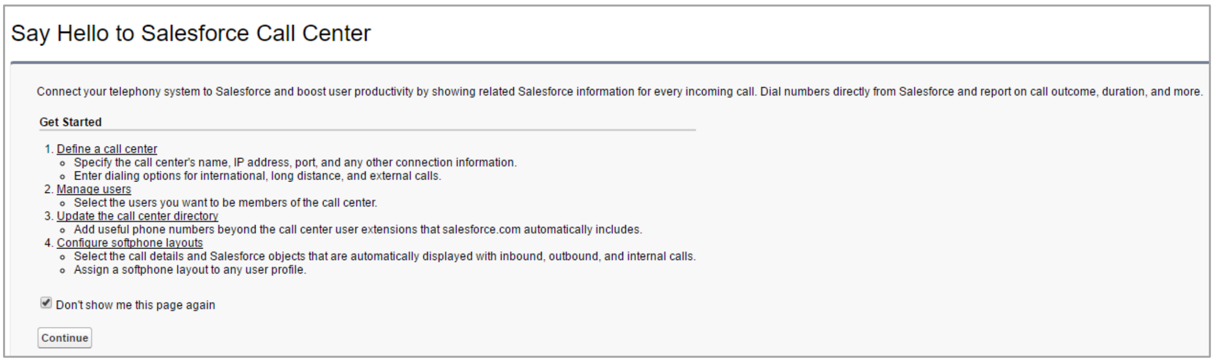
In order to use the Screen Popping feature you are required to assign users to the Call Center Setup.

Select the **Setup** Icon in the Top right of the screen mediahawk

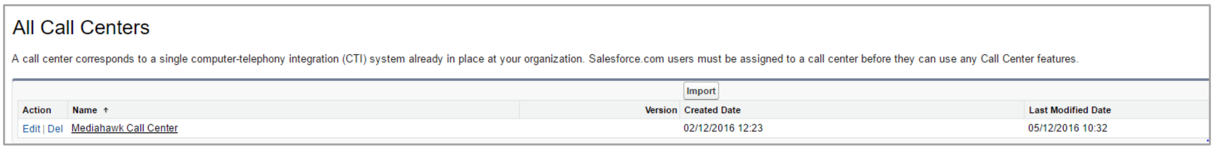
Use the Quickfind/Search Section in the left column and type **Call Center** and then select **Call Centers** from the Drop down



You will then see the screen below, Click **Continue**

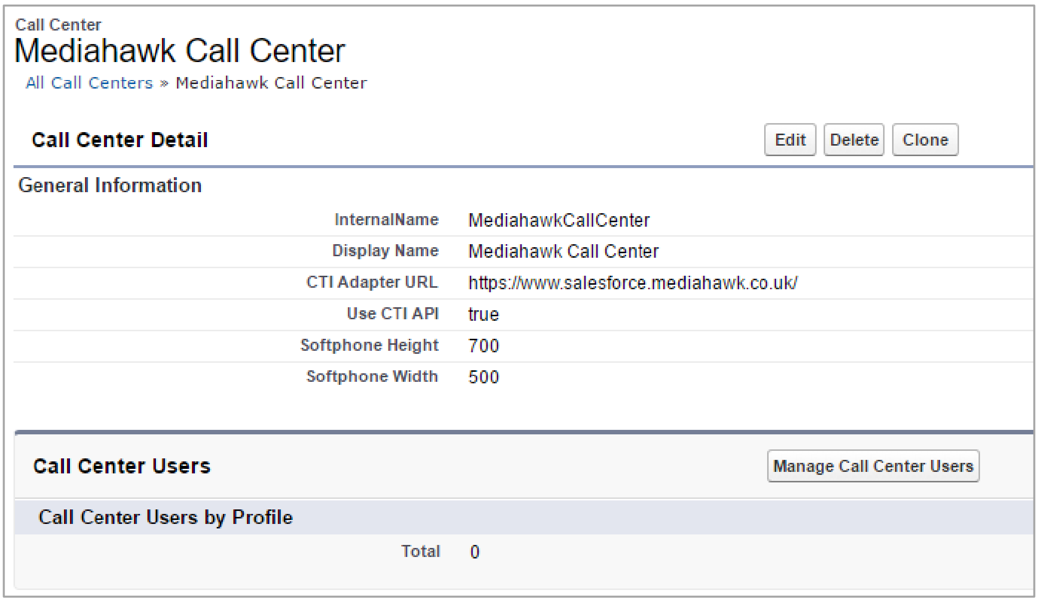


You will then be presented with this screen.



Select the **Mediahawk Call Center** setting

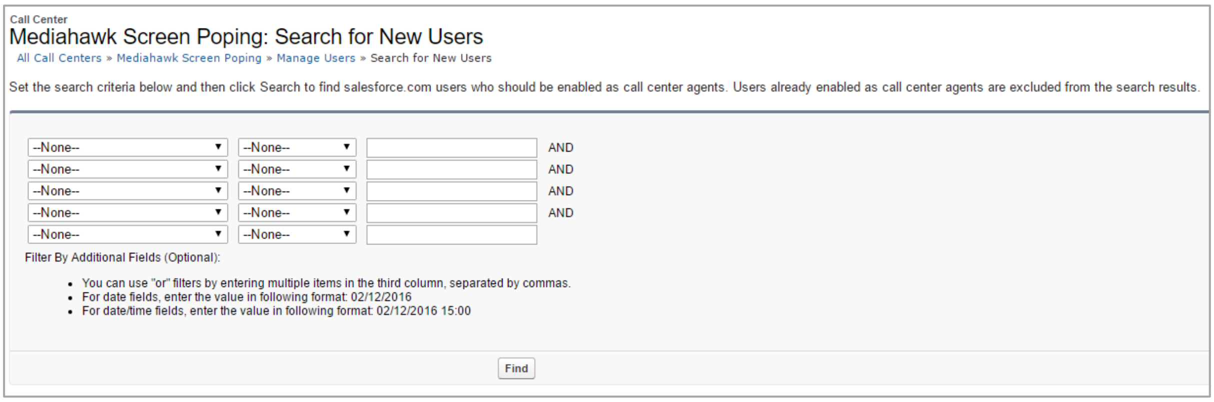
You will then be presented with this screen. Do not make any changes to the **General Information** Settings.



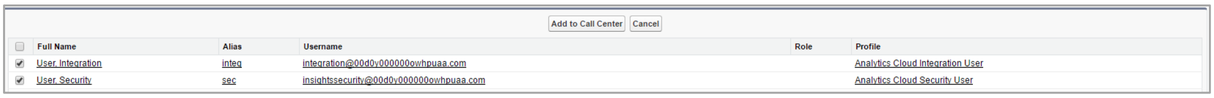
Select **Manage Call Center Users**

Select **Add More Users**

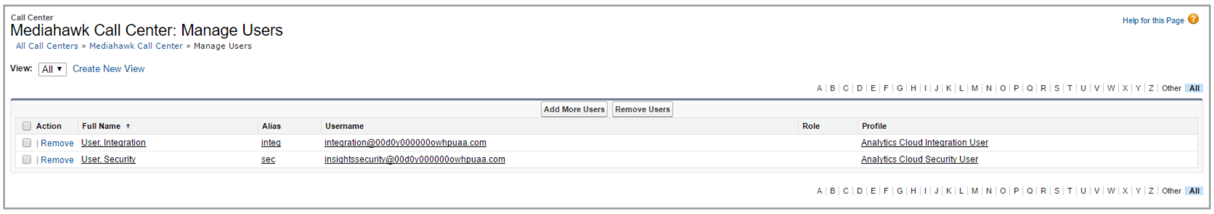
In the Next Window, you can either search for users in the grid or press **Find** to view all registered users.



If you use the find option, then simply tick the users you would like to assign to receive the screen popping and click **Add to Call Center**



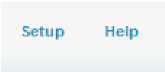
The next window will show the confirmed list of users who will receive the screen popping.



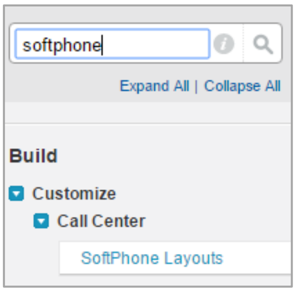
Setup SoftPhone Layout is active?

In order to use the Screen Popping feature the **SoftPhone** Layout must be enabled, this is generally created automatically when you setup a **Call Center** but we need to confirm it has been created.

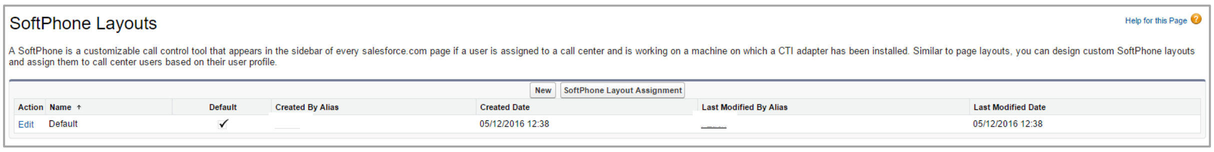
Select the **Setup** Icon in the Top right of the screen



Use the Quickfind/Search Section in the left column and type **softphone** and then select **SoftPhone Layouts** from the Drop down



You should be presented with a screen similar to this one below which shows a Default Setup.



If you do see this screen then progress to [Assign Departments to Users to continue setup](#).

If this screen is blank then click **New.** Enter a name for the Layout, in this example we have used Mediahawk Call Tracking and **tick the Default box** and click **Save**. You will then be presented with this screen.

This has setup the SoftPhone Layout setup.

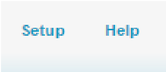
Assign Departments to Users?

In order to use the Screen Popping feature you are required to assign each user to a department.

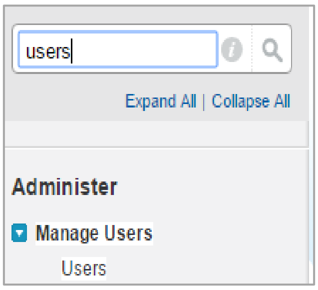
If you only want a single screen popping session across the business then assign a single department to all users

Setting up multiple departments allows the system to direct specific Mediahawk Service numbers to a group of individuals (departments) and allow the screen popping to only be active for that set of users (assigned Department).

Select the **Setup** Icon in the Top right of the screen

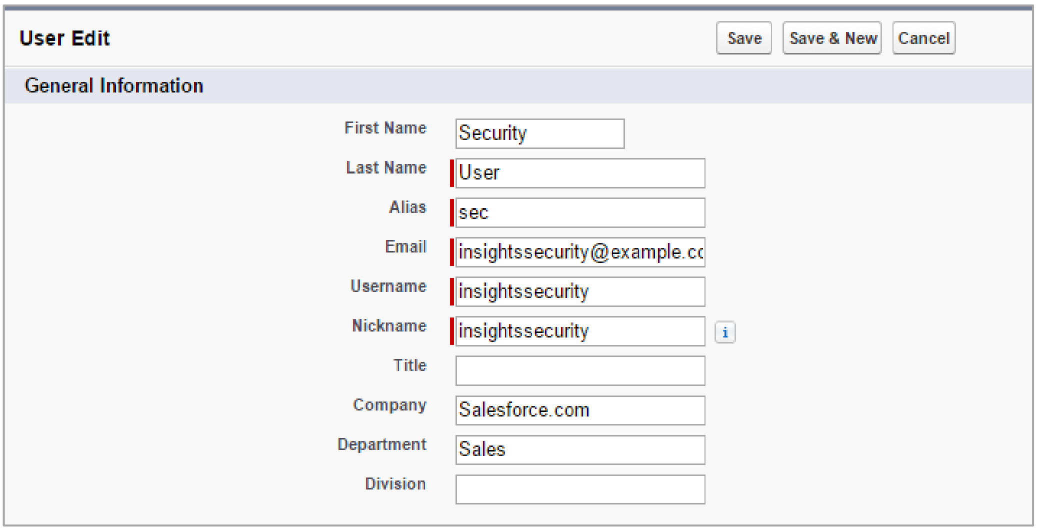


Use the Quickfind/Search Section in the left column and type **Users** and then select **Users** from the Drop down



You will be presented with a List of users that are registered on Salesforce, to edit a user simply select **edit** against the user’s name.

You then assign a Department to the user, in this example below we have setup a Sales Department
Please be aware that the departments are case sensitive text fields and must be the same for all the users who want to receive the same screen popping.



Once complete click **Save**

This Change must be done for all users who you wish to receive screen popping.

Salesforce Setup Checklist

Have you [installed the Mediahawk APP]() within Salesforce?

Have you **[Assigned Users to the Call Centre]** (Screen Popping only)?

Have you confirmed that **SoftPhone Layout** is Active?

Have you assigned **Departments to Users** (Screen Popping Only)?

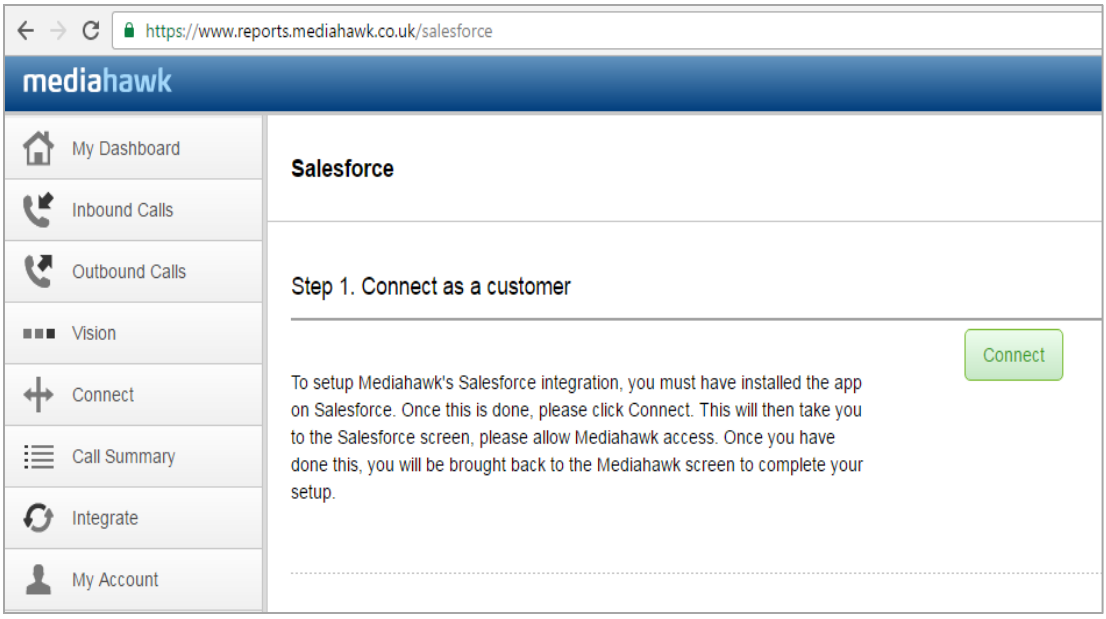
Once you have completed these activities select the **Home** Page at the top of the Page

You should be presented with the following screen (if screen Popping is setup)

You now need to setup the **Integration in Mediahawk** below.

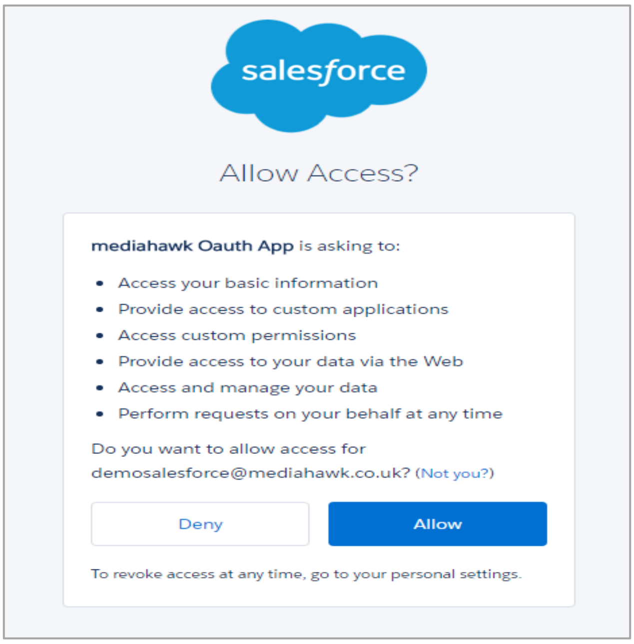
How do I set up the integration in Mediahawk?

Login to your Mediahawk account.
Navigate to the **Integrate tab** within Mediahawk and select **Salesforce**.



Click **Connect** to get started.

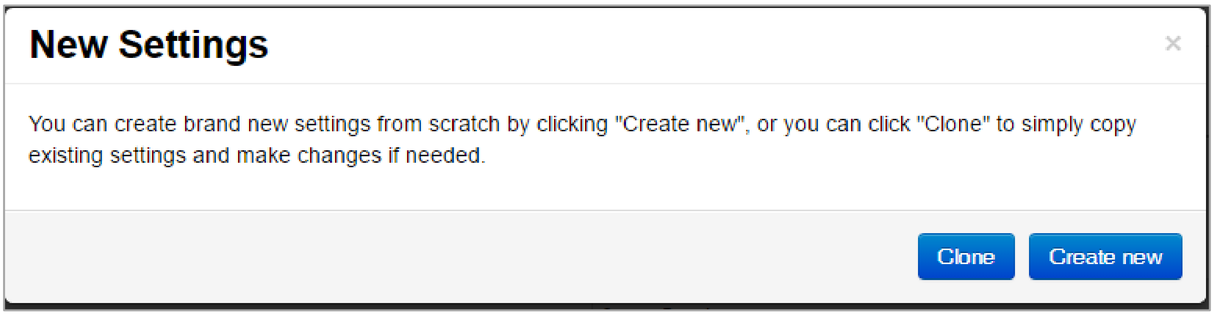
You will be redirected to the Salesforce website and asked to log in to Salesforce account, you will then be asked to allow Mediahawk access to your Salesforce organizations data. Click **Allow.**



Once you have allowed access you will be redirected back to the Mediahawk Salesforce Settings page.

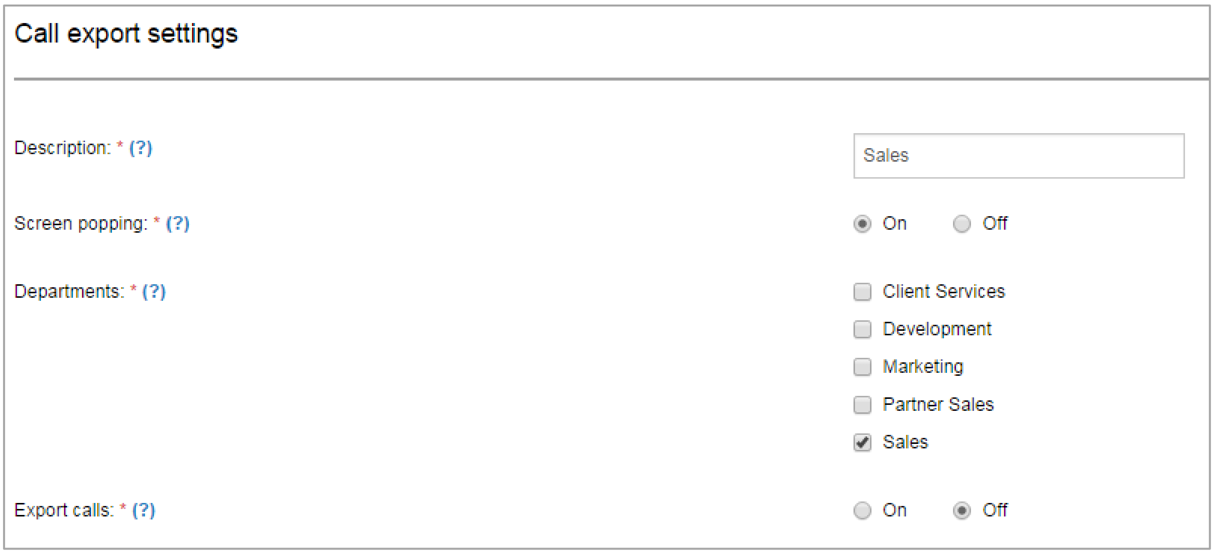
Click **Create new settings**

You will now be able to create a new setup or to clone an existing setup and settings (In this example we will create a new setup)



You will then be presented with this screen.

Salesforce Setup Page



Description

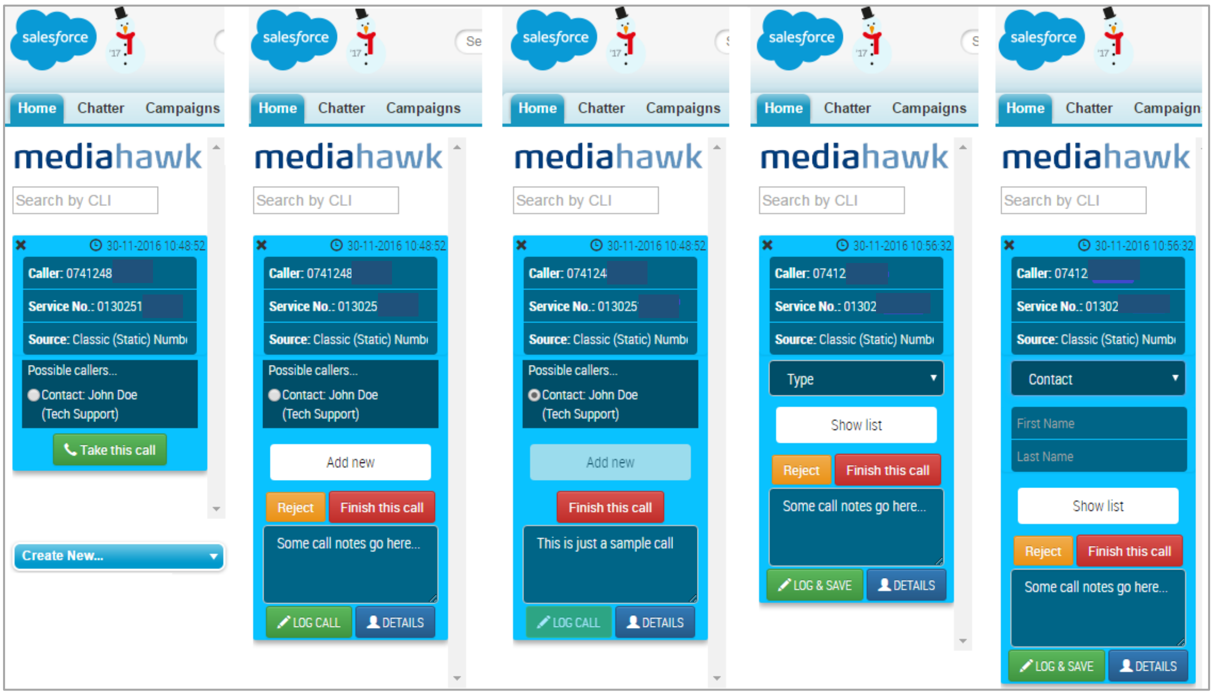
First set the description for the setting, this can be setup with any name, in the example we have used Sales.

Screen Popping

Screen Popping allows you to instantly see the caller details when an assigned Mediahawk Service number is called. The screens below will "pop up" within your salesforce application.

You can turn this feature on or off. If this feature is turned on, you will have setup [Call Centre Users](#) and [Assigned Departments to Users](#) within Salesforce.

Incoming calls will only show in Salesforce for users belonging to the selected department. You must have departments set up in your Salesforce settings in order to use the Mediahawk screen popping feature. Please see examples below of what the screen popping could look like:



Any Salesforce records (Lead, Contact or Account) created through the screen popping feature will be updated with any additional call/visitor data automatically by Mediahawk on an hourly basis.

Departments

When you connect with Salesforce for the first time, Mediahawk will automatically retrieve a list of the **Departments** you have assigned to users within your Salesforce Account.

Select the department(s) you want to receive screen popping within this setup.

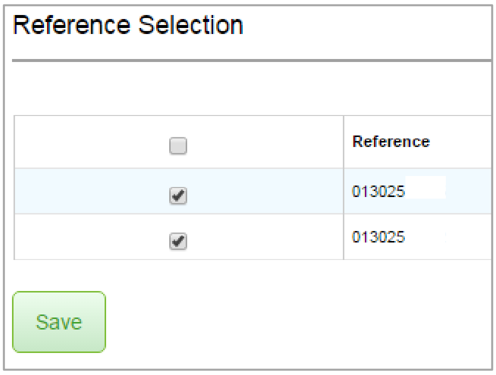
If you update your Departments within the Salesforce system and want these to be available to receive Mediahawk data you will need to refresh these fields in Mediahawk. This is a simple process of pressing the **Refresh Departments** at the bottom of the page.

Export Calls

You can also switch on our **export calls** feature. Once this is enabled, Mediahawk automatically matches existing Salesforce records (Lead, Contact or Account) with calls received and sends the details directly to the relevant record in Salesforce every hour.

Reference Selection
At the bottom of the set up screen you will see **Reference Selection** you must select the numbers or Vision Campaign you would like to integrate in to this Salesforce Setup. Simply tick the numbers and/or Vision campaigns you would like to integrate and click **Save**.

You can tick as many or few numbers as you would like to.



Once you have setup the Mediahawk Integration, Log into your Salesforce account and you will now see that the Popup screen (if enabled) is now visible with no errors.
The data above can be managed using the **Call Matching Settings under Advanced Settings** and allow you to choose how/what data you export into Salesforce.

When you connect with Salesforce for the first time, Mediahawk will automatically update the Layout screens in Salesforce sections, Account, Contact and Lead with Mediahawk fields. These fields can be added to your page layout and we will automatically update these. Alternatively, you can Map your own fields under **Advanced Setting** below using **Field Mapping Settings**.

Advanced Settings

Call matching settings

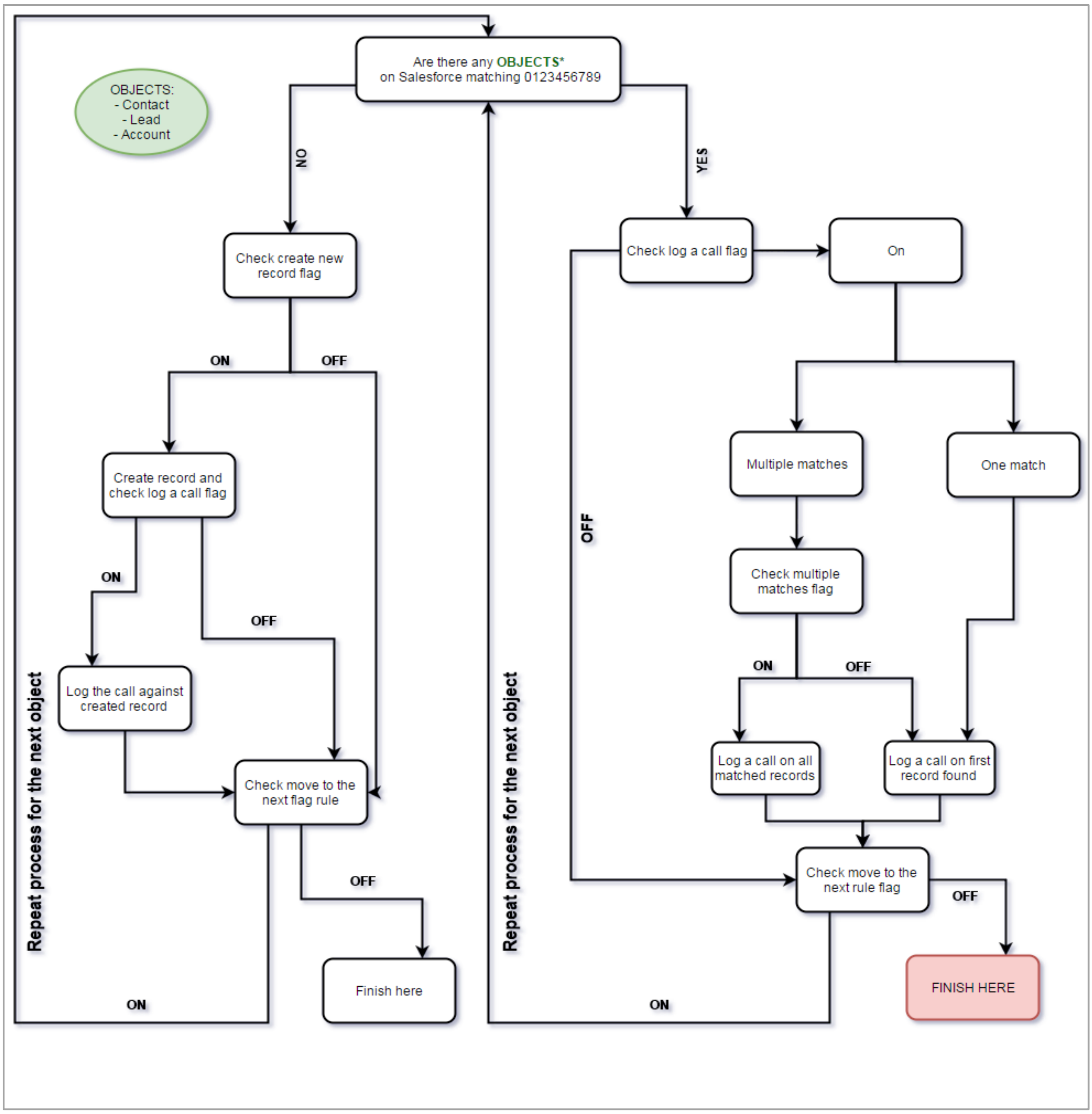
In this section you can define how you want Mediahawk to export calls to Salesforce.

This will only apply if you turned the **Export calls** option on. (Above)

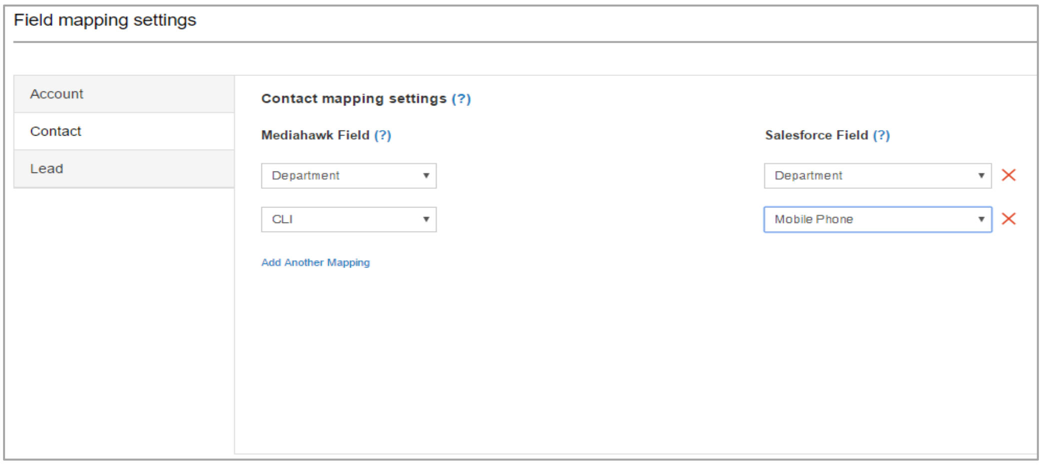
You will then use the **Priority List** to tell Mediahawk which record types we should match first.

Simply use **Up** and **Down** buttons to reorder priority list, you can also choose whether to log the call or create a new record if we find a match:

As an example using the settings on the above screenshot, the workflow diagram below shows how data from a call from 0123456789 would be exported.



Field mapping settings



When you connect with Salesforce for the first time, Mediahawk will automatically retrieve a list of available fields within your Salesforce account for all 3 sections above, Account, Contact and Lead. These are then added to the Salesforce Field selector within **Field Mapping Settings**.

Field mapping allows you to match Mediahawk and Salesforce fields to populate the correct data.

To map your fields first select the section you would like to update. Account, Contact or Lead and then select the Mediahawk field required and the corresponding Salesforce field you would like this data to populate in your Salesforce record.

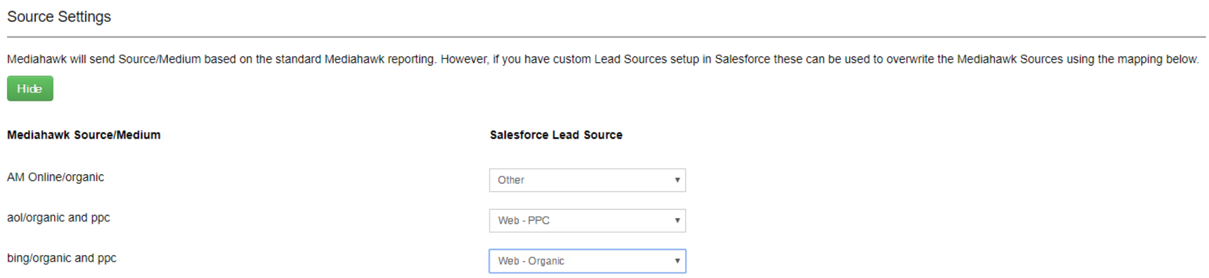
If you update your fields within the Salesforce system and want these to be available to receive Mediahawk data you will need to refresh these fields in Mediahawk. This is a simple process of pressing the **Refresh Salesforce Fields** at the bottom of the page.

In the example above we are mapping Contacts, we use the **Department** field to populate the Salesforce **Department** and also use the Mediahawk **CLI** field to populate the Salesforce **Mobile Phone** field.

You will need to map separately for Account, Contacts and Lead creation.

Source Settings

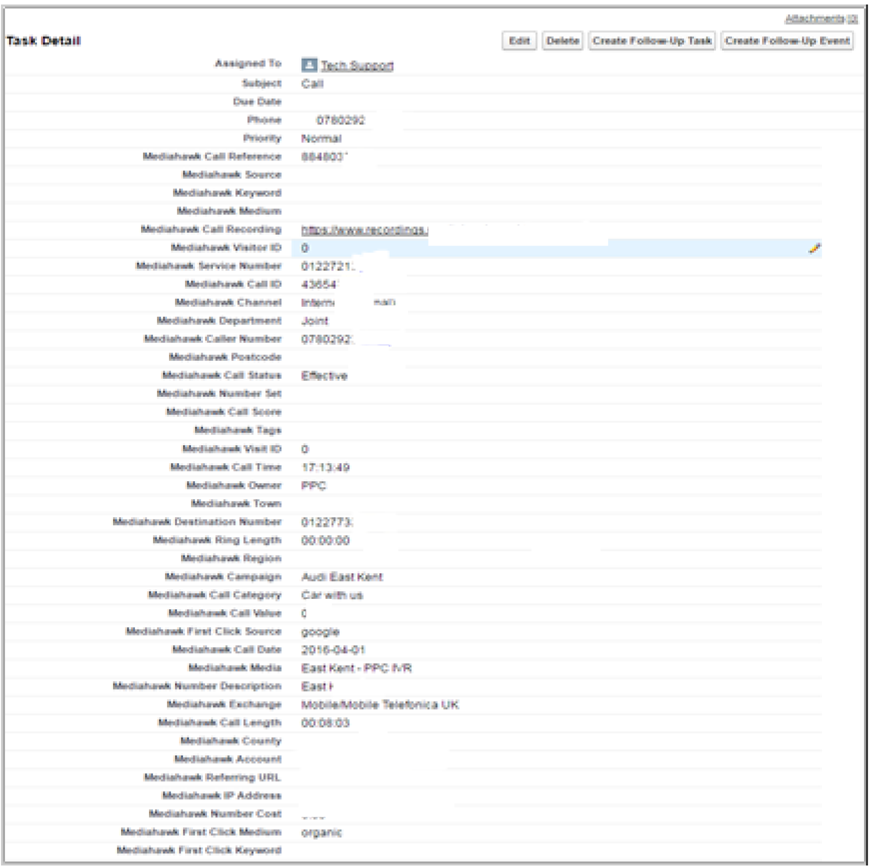
Mediahawk will send Source/Medium based on the standard Mediahawk reporting. However, if you have custom Lead Sources setup in Salesforce these can be used to overwrite the Mediahawk Sources using the mapping below



How would the Data be seen in Salesforce?

Please see below some screenshots showing Mediahawk calls in Salesforce.

- Example of call log when



Attachments (0)

Task Detail

Edit | Delete | Create Follow-Up Task | Create Follow-Up Event

Assigned To	Tech Support
Subject	Call
Due Date	
Phone	0780292
Priority	Normal
Mediahawk Call Reference	884803
Mediahawk Source	
Mediahawk Keyword	
Mediahawk Medium	
Mediahawk Call Recording	https://www.recordings.
Mediahawk Visitor ID	0
Mediahawk Service Number	0122721
Mediahawk Call ID	43654
Mediahawk Channel	Intern
Mediahawk Department	Joint
Mediahawk Caller Number	0780292
Mediahawk Postcode	
Mediahawk Call Status	Effective
Mediahawk Number Set	
Mediahawk Call Score	
Mediahawk Tags	
Mediahawk Visit ID	0
Mediahawk Call Time	17:13:49
Mediahawk Owner	PPC
Mediahawk Town	
Mediahawk Destination Number	0122773
Mediahawk Ring Length	00:00:00
Mediahawk Region	
Mediahawk Campaign	Audi East Kent
Mediahawk Call Category	Car with us
Mediahawk Call Value	0
Mediahawk First Click Source	google
Mediahawk Call Date	2016-04-01
Mediahawk Media	East Kent - PPC IVR
Mediahawk Number Description	East
Mediahawk Exchange	Mobile/Mobile Telefonica UK
Mediahawk Call Length	00:08:03
Mediahawk County	
Mediahawk Account	
Mediahawk Referring URL	
Mediahawk IP Address	
Mediahawk Number Cost	
Mediahawk First Click Medium	organic
Mediahawk First Click Keyword	

How do I check the Data that is being sent to Saleforce?

The Mediahawk Integration sends all API data to Saleforce and this is stored within your own Salesforce account. All Call Export and Screen Popping data.

Log valid for 7 days.

(under Account -> Setup -> Bulk Data Load Jobs). There is a list there with all requests uploaded via the Bulk API. Requests that update screen popping calls appear as type Task with action Update.