

# mediahawk

## Salesforce Integration

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## 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/package/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**




App Name	Publisher	Version Name	Version Number
Mediahawk Call Tracking	Mediahawk LTD	Initial Release	1.12

[Additional Details](#)   [View Components](#)

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

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## Install Mediahawk Call Tracking

By Mediahawk LTD

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 **Installing and granting access to all Users...**

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App Name	Publisher	Version Name	Version Number
Mediahawk Call Tracking	Mediahawk LTD	Initial Release	1.12

[Additional Details](#) [View Components](#)


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



## Install Mediahawk Call Tracking

By Mediahawk LTD

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 **Installation Complete!**

[Done](#)

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App Name	Publisher	Version Name	Version Number
Mediahawk Call Tracking	Mediahawk LTD	Initial Release	1.12

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


### Installed Packages

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.



[Visit AppExchange >](#)

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects
<a href="#">Uninstall</a>	<a href="#">Mediahawk Call Tracking</a>	Mediahawk LTD	1.12	MHCallTracking	27/06/2017 13:40	✓	0	0	2

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

[Setup](#) [Help](#)

Mediahawk, Powerhouse, Harrison Close, Knowlhill, Milton Keynes, MK5 8PA

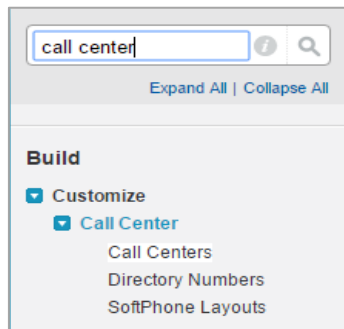
[www.mediahawk.co.uk](http://www.mediahawk.co.uk)

Please contact us on 0333 222 8333 or [Clientservices@Mediahawk.co.uk](mailto:Clientservices@Mediahawk.co.uk)

05/12/2018

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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**

Say Hello to Salesforce Call Center

Connect your telephony system to Salesforce and boost user productivity by showing related Salesforce information for every incoming call. Dial numbers directly from Salesforce and report on call outcome, duration, and more.

**Get Started**

- Define a call center**
  - Specify the call center's name, IP address, port, and any other connection information.
  - Enter dialing options for international, long distance, and external calls.
- Manage users**
  - Select the users you want to be members of the call center.
- Update the call center directory**
  - Add useful phone numbers beyond the call center user extensions that salesforce.com automatically includes.
- Configure softphone layouts**
  - Select the call details and Salesforce objects that are automatically displayed with inbound, outbound, and internal calls.
  - Assign a softphone layout to any user profile.

Don't show me this page again

You will then be presented with this screen.

All Call Centers

A call center corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce.com users must be assigned to a call center before they can use any Call Center features.

Action	Name ↑	Version	Created Date	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	Mediahawk Call Center		02/12/2016 12:23	05/12/2016 10:32

Select the **Mediahawk Call Center** setting

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

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Call Center  
**Mediahawk Call Center**  
[All Call Centers](#) » [Mediahawk Call Center](#)

**Call Center Detail** Edit Delete Clone

**General Information**

InternalName	MediahawkCallCenter
Display Name	Mediahawk Call Center
CTI Adapter URL	https://www.salesforce.mediahawk.co.uk/
Use CTI API	true
Softphone Height	700
Softphone Width	500

**Call Center Users** Manage Call Center Users

**Call Center Users by Profile**

Total	0
-------	---

Select **Manage Call Center Users**

Select **Add More Users**

Call Center  
**Mediahawk Screen Popping: Manage Users**  
[All Call Centers](#) » [Mediahawk Screen Popping](#) » [Manage Users](#) Help for this Page

View: [All](#) [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other [All](#)

Full Name ↑	Alias	Username	Role	Profile
No records to display.				

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other [All](#)

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

Call Center  
**Mediahawk Screen Popping: Search for New Users**  
[All Call Centers](#) » [Mediahawk Screen Popping](#) » [Manage Users](#) » [Search for New Users](#)

Set the search criteria below and then click Search to find salesforce.com users who should be enabled as call center agents. Users already enabled as call center agents are excluded from the search results.

--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 02/12/2016
- For date/time fields, enter the value in following format: 02/12/2016 15:00

Find

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**

<input type="checkbox"/>	Full Name	Alias	Username	Role	Profile
<input checked="" type="checkbox"/>	User_Integration	inteq	integration@0040v000000vhpuaa.com		Analytics.Cloud.Integration.User
<input checked="" type="checkbox"/>	User_Security	sec	insightssecurity@0040v000000vhpuaa.com		Analytics.Cloud.Security.User

Add to Call Center Cancel

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

Action	Full Name	Alias	Username	Role	Profile
<input type="checkbox"/> Remove	User_Integration	integ	integration@00d0v0000000ovhpuaa.com	Analytics.Cloud.Integration.User	Analytics.Cloud.Integration.User
<input type="checkbox"/> Remove	User_Security	sec	insightssecurity@00d0v0000000ovhpuaa.com	Analytics.Cloud.Security.User	Analytics.Cloud.Security.User

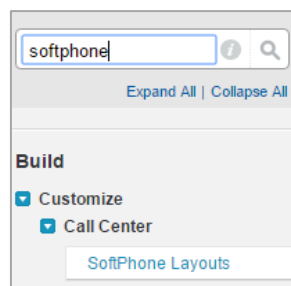
## Setup SoftPhone Layout is active?

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.

Action	Name	Default	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
<input type="checkbox"/> Edit	Default	<input checked="" type="checkbox"/>		05/12/2016 12:38		05/12/2016 12:38

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.

Action	Name	Default	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
<input type="checkbox"/> Edit	Mediahawk Call Tracking	<input checked="" type="checkbox"/>		07/12/2016 15:14		07/12/2016 15:14

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

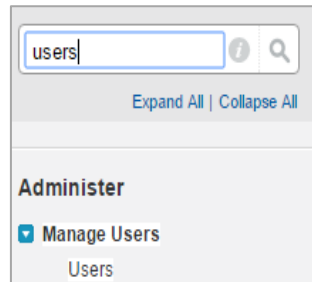
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Setting up multiple departments allows the system to direct specific Mediahawk Service numbers to a group of individuals (departments) and allow the screen popping to only be active for that set of users (assigned Department).

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.

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatty.00d0y000000owhpuaa.kv3uivwsl9hz@chatter.salesforce.com			✓	Chatter Free User
<input type="checkbox"/>   Edit	User Integration	intea	integration@00d0y000000owhpuaa.com			✓	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User Security	sec	insightssecurity@00d0y000000owhpuaa.com			✓	Analytics Cloud Security User

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.**

A screenshot of a 'User Edit' form. The form has a title bar with 'User Edit' and three buttons: 'Save', 'Save & New', and 'Cancel'. Below the title bar is a section titled 'General Information'. The form contains several input fields: 'First Name' (Security), 'Last Name' (User), 'Alias' (sec), 'Email' (insightssecurity@example.co), 'Username' (insightssecurity), 'Nickname' (insightssecurity), 'Title' (empty), 'Company' (Salesforce.com), 'Department' (Sales), and 'Division' (empty).

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?

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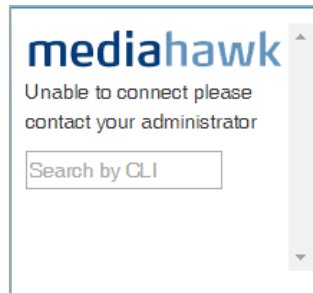
Have you [Assigned Users to the Call Centre](#) (Screen Popping only)?

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)

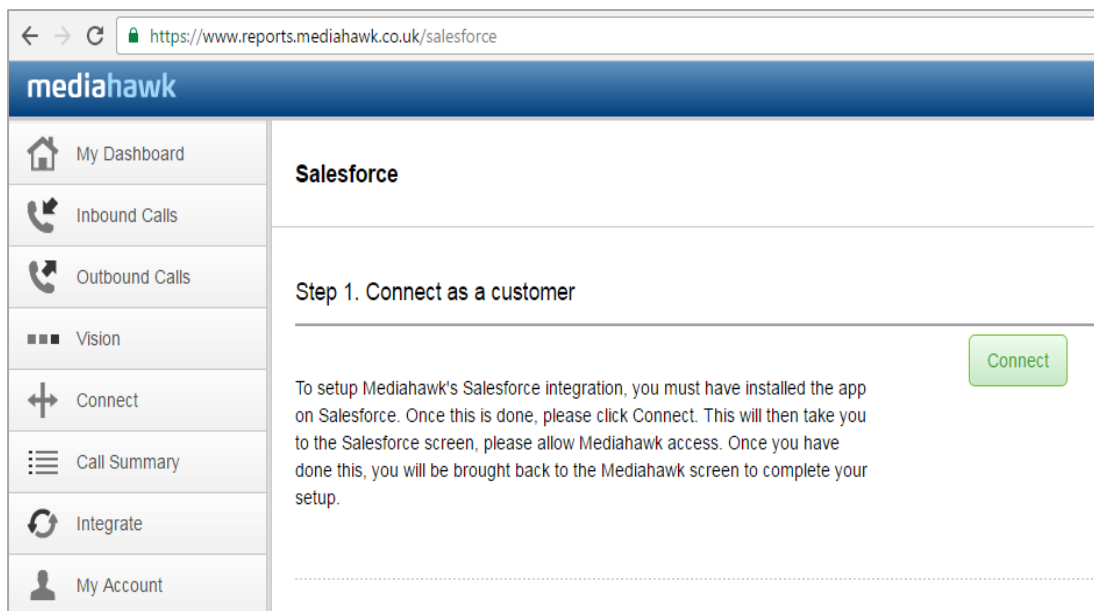


You now need to setup the [Integration in Mediahawk](#) below.

## How do I set up the integration in Mediahawk?

Login to your Mediahawk account.

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

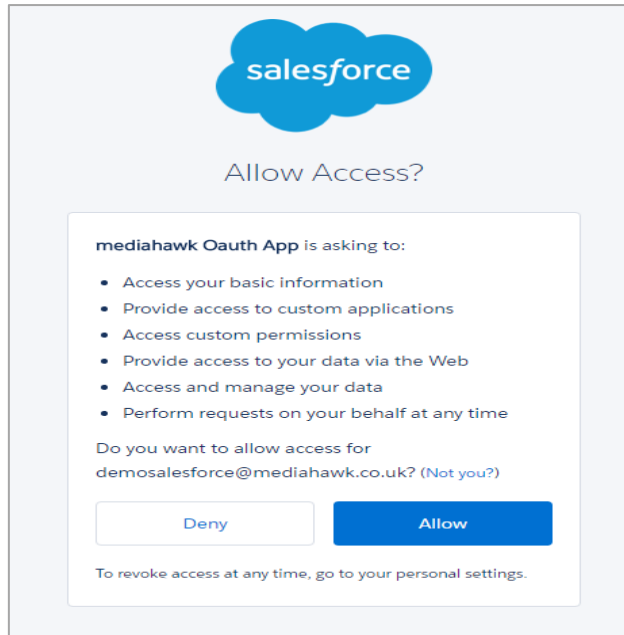


Click **Connect** to get started.

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**.



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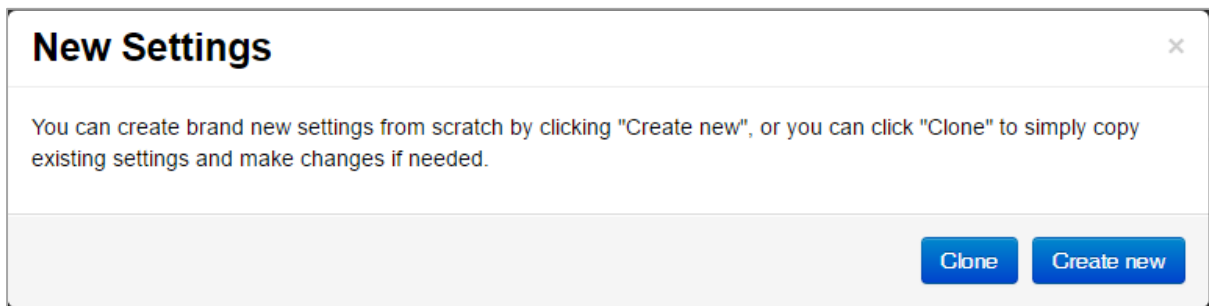


Once you have allowed access you will be redirected back to the Mediahawk Salesforce Settings page.

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

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## Call export settings

Description: \* (?)

Sales

Screen popping: \* (?)

On  Off

Departments: \* (?)

- Client Services
- Development
- Marketing
- Partner Sales
- Sales

Export calls: \* (?)

On  Off

### Description

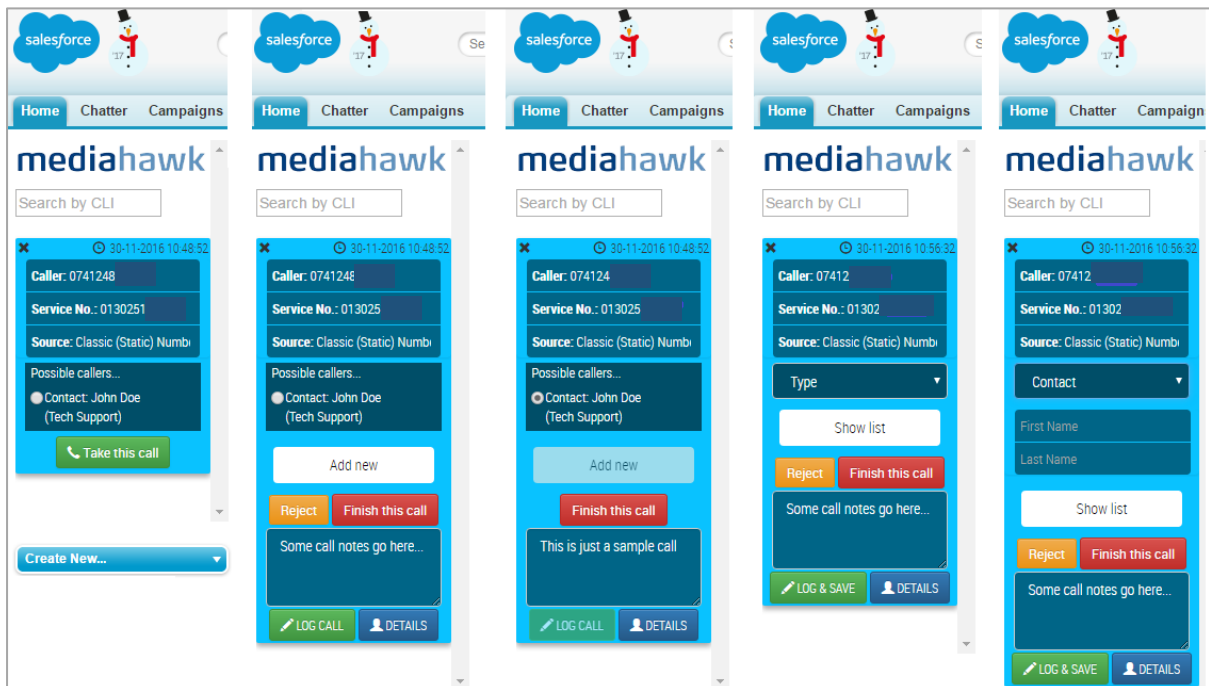
First set the description for the setting, this can be setup with any name, in the example we have used Sales.

### 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:



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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.

Reference Selection	
<input type="checkbox"/>	Reference
<input checked="" type="checkbox"/>	013025
<input checked="" type="checkbox"/>	013025

**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.

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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:

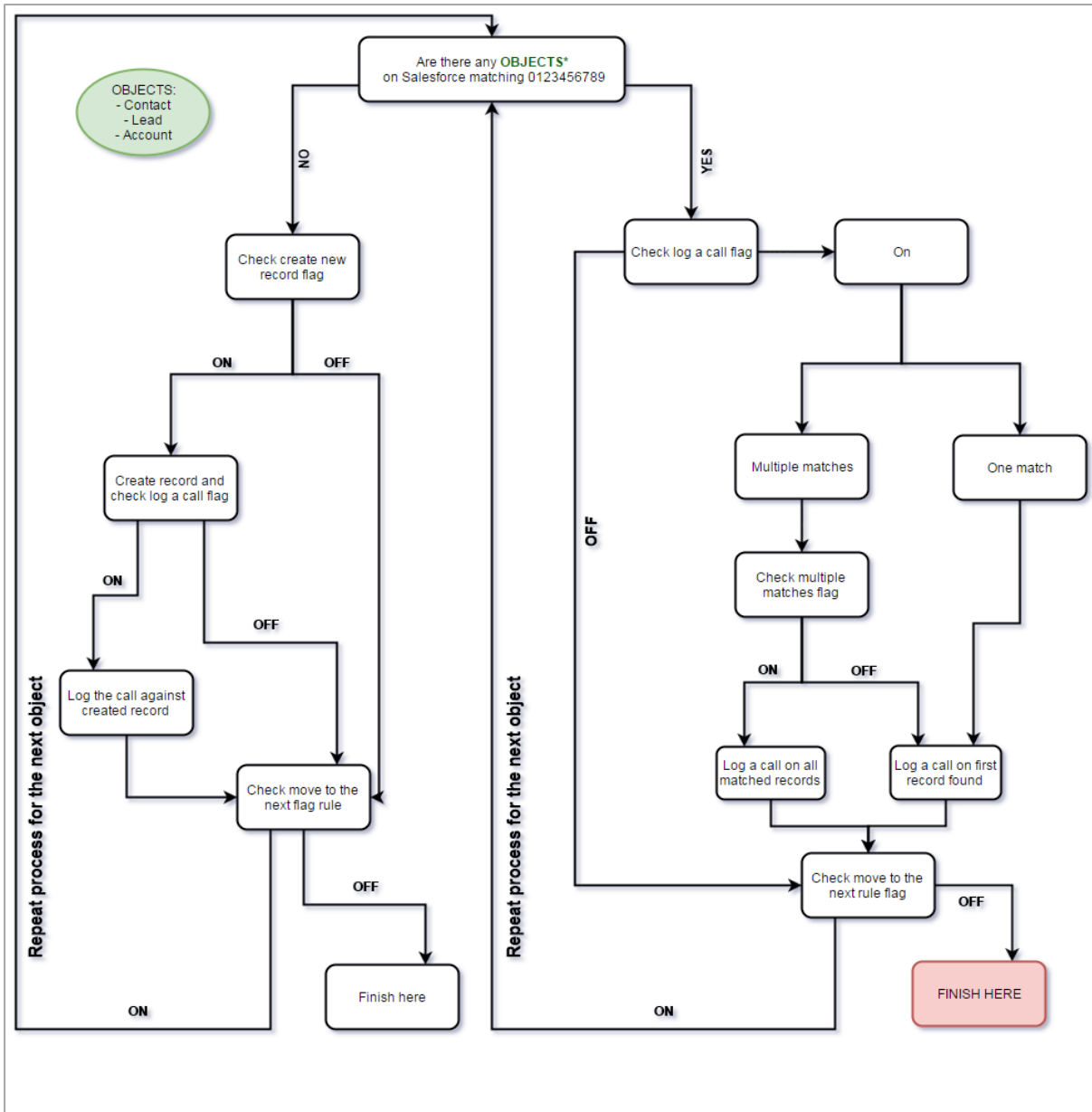
Call matching settings

Priority List (?)	Log call (?)	New (?)	Reorder	
Contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Up	Down
Lead	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Up	Down
Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Up	Down

On find or creation, move to the next rule (?)     Update multiple leads, accounts or contacts (?)

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.

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## Field mapping settings

Field mapping settings

Account	Contact mapping settings (?)	
Contact	Mediahawk Field (?)	Salesforce Field (?)
Lead	Department	Department
	CLI	Mobile Phone
	<a href="#">Add Another Mapping</a>	

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[www.mediahawk.co.uk](http://www.mediahawk.co.uk)

Please contact us on 0333 222 8333 or [Clientservices@Mediahawk.co.uk](mailto:Clientservices@Mediahawk.co.uk)

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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

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.

Hide

### Mediahawk Source/Medium

AM Online/organic

ao/organic and ppc

bing/organic and ppc

### Salesforce Lead Source

Other

Web - PPC

Web - Organic

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## How would the Data be seen in Salesforce?

Please see below some screenshots showing Mediahawk calls in Salesforce.

- Example of call log when

The screenshot shows a 'Task Detail' record in Salesforce. The record is assigned to 'Tech Support' and has a subject of 'Call'. The due date is blank, the phone number is 0780292, and the priority is 'Normal'. The Mediahawk Call Reference is 884803. The Mediahawk Call Recording is a URL: https://www.recordings. The Mediahawk Visitor ID is 0. The Mediahawk Service Number is 0122721. The Mediahawk Call ID is 43654. The Mediahawk Channel is 'Inpnt mail'. The Mediahawk Department is 'Joint'. The Mediahawk Caller Number is 0780292. The Mediahawk Postcode is blank. The Mediahawk Call Status is 'Effective'. The Mediahawk Number Set is blank. The Mediahawk Call Score is blank. The Mediahawk Tags are blank. The Mediahawk Visit ID is 0. The Mediahawk Call Time is 17:13:49. The Mediahawk Owner is 'PPC'. The Mediahawk Town is blank. The Mediahawk Destination Number is 0122773. The Mediahawk Ring Length is 00:00:00. The Mediahawk Region is blank. The Mediahawk Campaign is 'Audi East Kent'. The Mediahawk Call Category is 'Car with us'. The Mediahawk Call Value is 0. The Mediahawk First Click Source is 'google'. The Mediahawk Call Date is '2016-04-01'. The Mediahawk Media is 'East Kent - PPC IVR'. The Mediahawk Number Description is 'East'. The Mediahawk Exchange is 'Mobile/Mobile Telefonica UK'. The Mediahawk Call Length is 00:08:03. The Mediahawk County is blank. The Mediahawk Account is blank. The Mediahawk Referring URL is blank. The Mediahawk IP Address is blank. The Mediahawk Number Cost is '---'. The Mediahawk First Click Medium is 'organic'. The Mediahawk First Click Keyword is blank. The record has buttons for 'Edit', 'Delete', 'Create Follow-Up Task', and 'Create Follow-Up Event'.

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

The Mediahawk Integration sends all API data to Salesforce 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.