



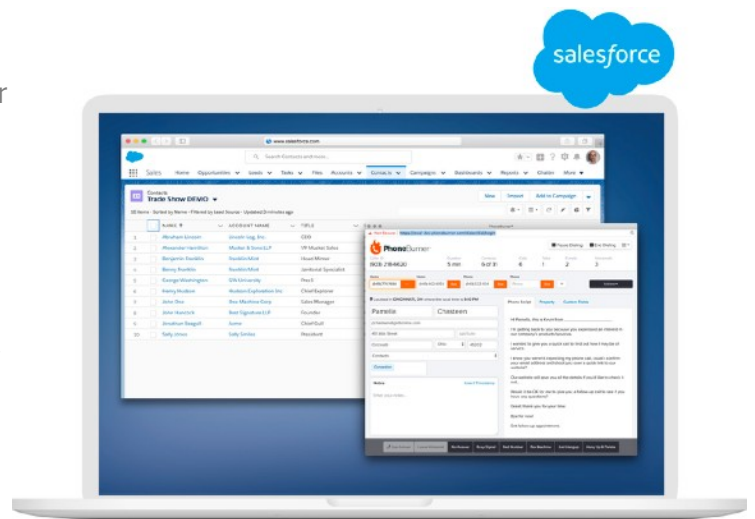
PhoneBurner for Salesforce INSTALLATION GUIDE



Installing PhoneBurner for Salesforce

With PhoneBurner's native Salesforce integration, reps can dial 60-80 contacts per hour and dramatically boost live client interactions. Select contacts in Salesforce and start dialing.

When a contact answers live, reps can reply immediately - there's no awkward pause or telemarketer delay.



Leave voicemails, send emails based on call outcome, and more, all in a single click, as the next contact is dialed. Salesforce records are automatically updated.

Use this step-by-step guide to install PhoneBurner for Salesforce.

If you need assistance, please contact support at: (888) 928-7637 or support@phoneburner.com

You can also log in to PhoneBurner and access video training [available here](#).

Sign Up

Get your PhoneBurner account

If you already have a PhoneBurner account, you can continue to the next section.

1. Visit PhoneBurner.com to create your free account
2. Complete the form to start your free trial

Install

Get the PhoneBurner app from the AppExchange

Now that you have your PhoneBurner account, let's get the app from the Salesforce AppExchange

1. Navigate your browser to [PhoneBurner's Salesforce App Exchange Listing](#)
2. Click on the panel with the PhoneBurner logo and select the "Get It Now" button on the right.



3. If you're not already logged in, Salesforce will prompt you to login.
4. Once it's done, you'll be presented with an option to install the app into your production system.
5. If you select the sandbox option, you will need to take additional steps in PhoneBurner and will need to rerun the installation process in production system for a go live.
6. Agree to the terms and follow the screens displayed by Salesforce. You may be

asked to login again using your same Salesforce credentials.

7. Once you're authenticated again, you'll be dropped into your Salesforce account on a page that displays the PhoneBurner package details. Click the orange Continue button.
8. Now Salesforce will walk you through a few steps to finish the installation of the package
9. Salesforce will ask you which accounts you'd like the application installed into. The most common option is "Install for All Users". Then click the blue Install button.
10. Salesforce will now install the package. This may take a few moments. Once it's done, Salesforce will send you an email confirmation. Once it's installed you can proceed to configuring your dialer.

Configure

Setup your Salesforce account to work with PhoneBurner

Now that you have a PhoneBurner account and the app is installed, it's time to configure your Salesforce system. PhoneBurner can be launched from Leads, Contacts or any object that is linked to Leads or Contacts with a Lookup field to Leads or Contacts. .

Setup "Lead", "Contact" and "Activity/Task" tabs:

Before you can do a dial-session from Salesforce, you'll need to add the button to your contacts tab. To do this, follow these steps:

Before you can do a dial-session from Salesforce, you'll need to add the PhoneBurner button to your "Contacts" and "Leads" tab. To do this, follow these steps:

1. Click "Setup" from your drop-down menu or from the setup icon.
2. Add the button to "Contacts" Object

From Classic:

- a. Click Customize -> Contacts -> Search Layouts.
- b. Click Edit on the Contacts List View layout.
- c. Select "Begin PhoneBurner Session" from the list of Available Buttons and click the right arrow button to move it over to the Selected Buttons.
- d. Click Save.

From Lightning:

- a. Navigate to the “Object Manager” tab in setup
 - b. Click on the “Contact” object
 - c. “Search Layouts” and edit the “default” Profile
 - d. Add “Begin PhoneBurner Session” to the list of selected buttons.
 - e. Check the “Search Layouts” for Salesforce Classic
 - f. Edit the “List View” option From there you need to add “Begin PhoneBurner Session” to the list of selected buttons.
3. Navigate to your “Contacts” tab, Choose a list and click the “Go” button to view your contacts. You will see the button at the top of the grid.
 4. Now repeat these steps to add the button to the “Leads” and “Task” Object

Create Configuration:

Add PhoneBurner to Other tabs:

IMPORTANT: You can add a PhoneBurner button and call contacts from Opportunities, Cases, and Tasks, as well as Custom Objects, as long as they have a Custom Lookup or Master Detail field to a Lead or Contact.

1. Navigate to the “Create Configuration” tab:

ACTION	OBJECT API	FIELD API
<button>Remove</button>	-- None --	-- None --

Add Row Create Mapping

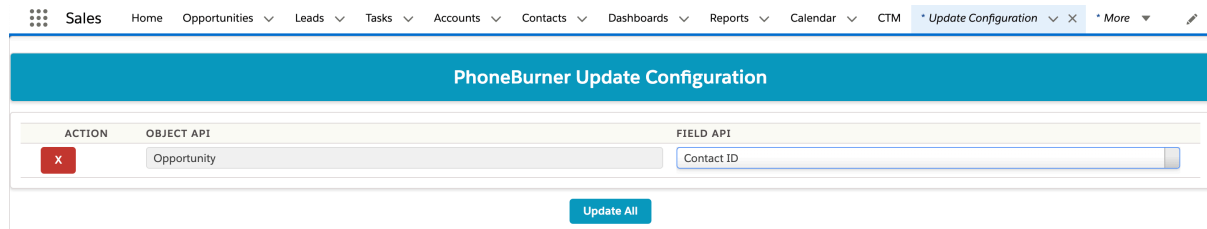
2. Select Object API
3. Select Field API
4. Select “Create Mapping”
5. Migrate to the Object
6. Add buttons to the Search Layouts
7. Repeat for Opportunities, Tasks, Cases, Additional Custom Objects, etc.

NOTE: for Opportunities – The standard mapping uses Contact Roles.


Update Configuration:

You will only need to update a Configuration if you change the lookup field.

1. Navigate to the “Update Configuration” tab:



The screenshot shows the Salesforce interface with the 'Update Configuration' tab selected. The page title is 'PhoneBurner Update Configuration'. Below the title is a table with three columns: ACTION, OBJECT API, and FIELD API. The ACTION column has a red 'X' icon. The OBJECT API column has a dropdown menu with 'Opportunity' selected. The FIELD API column has a dropdown menu with 'Contact ID' selected. Below the table is a blue 'Update All' button.

ACTION	OBJECT API	FIELD API
	Opportunity	Contact ID

[Update All](#)

2. Select Object API
3. Select Field API
4. Select “Update All”

Optional Setup “Dial-Session History” and “Voicemail Recordings” tabs in Salesforce – Optional Step

These tabs are optional. The “Dial-Session History” tab displays the user’s past dial sessions. The “Voicemail Recordings” tab allows the user to modify their pre-recorded voicemails from Salesforce, instead of navigating to the PhoneBurner application.

These tabs require 2 data points – each users’ API Key and your User Key. These keys allow Salesforce to communicate with PhoneBurner and get information from each account. They are secure keys and it is safe to provide this information to your Salesforce account. But each user in your organization will need their own PhoneBurner account and will have their own API Key and User Key.

To collect these keys:

1. Log into the PhoneBurner account of the user you are setting up
2. Click the circle profile icon in the top right section of your back office and select “Integration Settings” from the dropdown.
3. Next to Salesforce click “Details” to locate the API key and User key.

In another window, log into Salesforce and open your personal Salesforce settings, and type “Authentication” in the Quick Find box.

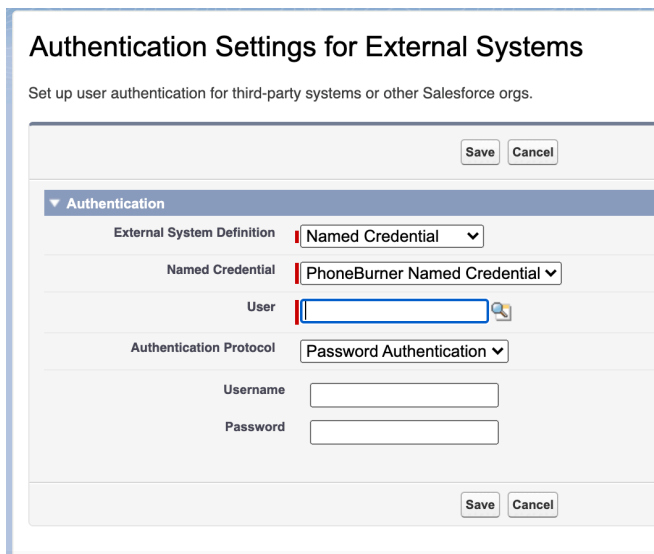
Click "Authentication Settings for External Systems".

Click the New button.

3. Fill in:

- External System Definition: Named Credential
- Named Credential: PhoneBurner Named Credential
- User: Choose the Salesforce user you are creating the Authentication for
- Authentication Protocol: Password Authentication
- Username: “User Key” value from your PhoneBurner backoffice.
- Password: “API Key” value from your PhoneBurner backoffice.

3. Click Save.



The screenshot shows the 'Authentication Settings for External Systems' configuration page in Salesforce. The page title is 'Authentication Settings for External Systems' with a subtitle 'Set up user authentication for third-party systems or other Salesforce orgs.' Below the title is a 'Save' and 'Cancel' button pair. The main form area is titled 'Authentication' and contains several fields: 'External System Definition' is a dropdown menu set to 'Named Credential'; 'Named Credential' is a dropdown menu set to 'PhoneBurner Named Credential'; 'User' is a text input field with a search icon; 'Authentication Protocol' is a dropdown menu set to 'Password Authentication'; 'Username' is a text input field; and 'Password' is a text input field. At the bottom of the form is another 'Save' and 'Cancel' button pair.