Signing into Fuze for Salesforce

1. Sign into Salesforce
2. Click the SIGN IN button within Fuze for Salesforce
3. Enter the username and then click the NEXT button
4. Enter the password and then click the SIGN IN button

Placing a Call

1. Type name or phone number in the Search by name or number field
2. Press **Enter**
3. Click the telephone number
4. Answer the device

Note: Calls are placed using a preferred device.

Receiving a Call

1. Answer the call via any Fuze device
2. To reject or decline the call use the preferred device
   OR
3. Click the button

Transferring a Call

1. Click the button during an active call
2. Type the telephone number or extension in the **Transfer to** field
3. Click the TRANSFER button

Placing a Call on Hold

1. Click the button to place an active call on hold
2. Click the button to resume the held call

Managing Multiple Calls

1. Answering a call while currently on a call, will automatically place the current call on hold
   OR
2. Declining a call while currently on a call, will send the caller to the user's voicemail

Adding a New Contact

1. Click the Unknown Caller in the Call Log
2. Click the button
3. Select **Add New Contact**
4. Fill in all applicable fields
5. Click **Save**

Note: Select to create a contact during an active call

Editing a Contact

1. Select a contact from the Call Log
2. Click the button
3. Click **Edit Contact identity**
4. Click the **Save** button

Adding a New Lead

1. Select an Unknown Caller from the Call Log
2. Click the button
3. Select **Add New Lead**
4. Populate applicable fields
5. Click the **Save** button

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Adding a New Opportunity	Adding a New Case	Accessing the Call Log
1. Select a contact from the Call Log 2. Click the **Related To…** button 3. Click **NEW OPPORTUNITY** 4. Populate applicable fields 5. Click the **Save** button	1. Select a contact from the Call Log 2. Click the **Related To…** button 3. Click **NEW CASE** 4. Populate applicable fields 5. Click the **Save** button	1. Click the name or number in the Call Log to view additional caller information 2. Click the filter **All Calls (3)** dropdown to select which type of calls to view

Selecting a Call Result	Managing Call Records	Adding Notes
1. Click the name or number in the Call Log 2. Click the SELECT CALL RESULT button 3. Select the appropriate call result from the available options 4. Click **DONE** to assign the call result	1. Hover over the name or number in the Call Log 2. Click the ⋮ button a. Click **Edit Contac Identity** to edit the contact information b. Click SELECT CALL RESULT to assign a call result c. Click VIEW TASK IN SF to be taken to the Task record d. Click VIEW CONTACT IN SF to be taken to the Contact record e. Click DELETE CALL FROM SF to delete the Call record	1. Within the Activity History, click **Enter Notes** 2. Populate notes field 3. Click DONE

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