

Phone Manager Application Support - SalesForce

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APPLICATION SUPPORT



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SalesForce

Overview

This describes the features that are available when integrating with SalesForce.

Supported Versions

The following SalesForce versions are supported.

Edition	Supported
Contact Manager	
Group	
Professional	 £
Enterprise	
Performance	

£ - Additional SalesForce fees may apply

Features

Integration with SalesForce supports the features listed below:

- [Screen pop for contacts](#)
- [Automatic call history entry](#)

Screen pop

CRM *Contact*, *Account* and/or *Lead* entities can be screen popped directly within SalesForce when an incoming call is received using the caller id or from an outgoing call using the dialed number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* entity was found and the record was automatically displayed using the Users default browser.

The screenshot shows the Salesforce 'Contacts' page for 'Luka Pape'. The left sidebar includes a search bar, 'Limit to items I own' checkbox, 'Advanced Search...', 'Create New...' dropdown, and a 'Recent Items' list with names like Mark Laird, David Smith, Sun Shu, Alberto Puga, Shana Bouchard, Youssef Yount, Sergio Araya, Gorka Santos, Mitel, and Sales. The main content area displays the 'Contact Detail' for 'Luka Pape', including fields for Contact Owner (Maureen West), Name (Gary Fisher), Account Name (Mitel), Title, Department, Birthdate, Reports To (View Org Chart), Lead Source, Mailing Address, Languages, Level, Created By (Gary Fisher, 25/07/2014 14:52), and Last Modified By (Gary Fisher, 25/07/2014 14:52). A 'Call Center' window is open on the right, showing a call log with the number 7774441111 and a duration of 00:02. A 'Clear call' button is visible at the bottom right of the call center window.

If multiple matches are found then the *Multiple Contacts Found* window is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found one matching *Account* entity and three matching *Contact* entities that have this telephone number.

The screenshot shows a 'Multiple Contacts Found' window with a 'Results' tab. The results list includes: Account: Mitel, Contact: Deborah Green, Contact: Xu Zheng, and Contact: Bastien Beaumont. A 'Display' button is located at the bottom right of the results list. To the right of the window, a call center window is visible, showing a call log with the number 2225554444 and a duration of 00:01. A 'Clear call' button is visible at the bottom right of the call center window.

The correct entity can then be highlighted and then clicking on the *Display* button will open this record.

Entity and matching options

Configuration options are available on the plugin that allow the type of *Entities* to be used in the searching to be set. For example it can be configured so that only the *Contact* entities are searched. These options are set on the *Options* tab

The image shows the Salesforce 'Options' tab in a user profile. Under the 'Screen Pop' section, there are three checked checkboxes: 'Accounts', 'Contacts', and 'Leads'. Under the 'New Entity' section, there is an unchecked checkbox 'Display blank entity on no match' and a dropdown menu labeled 'Type' with 'Contact' selected.

If no match is found when searching for an Entity than a blank form can be automatically displayed to create a New Entity. The Type of Entity, *Contact*, *Account* or *Lead* that is created can be set here.

Search fields

The range of telephone numbers that are to be searched are not configurable. All Salesforce fields that are have the *phone* type will be used.

The image shows the 'Step 1. Choose the field type' screen in Salesforce. It prompts the user to 'Specify the type of information that the custom field will contain.' A list of data types is shown on the left, with 'None Selected' at the top. The 'Phone' option is highlighted with a red rectangle. The descriptions for each data type are on the right.

Data Type	Description
☒ None Selected	Select one of the data types below.
☐ Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
☐ Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
☐ Roll-Up Summary	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
☐ Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
☐ Checkbox	Allows users to select a True (checked) or False (unchecked) value.
☐ Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
☐ Date	Allows users to enter a date or pick a date from a popup calendar.
☐ Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the popup, that date and the current time are entered into the Date/Time field.
☐ Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
☐ Geolocation	(Beta) Allows users to define locations.
☐ Number	Allows users to enter any number. Leading zeros are removed.
☐ Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
☐ Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
☐ Picklist	Allows users to select a value from a list you define.
☐ Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
☐ Text	Allows users to enter any combination of letters and numbers.

The format of the telephone number does not make any difference as any type of format is supported. The number dialled/received is used for the searching.

Automatic call history entry

The plugin supports the ability to be able to automatically create and display a Salesforce Phone Task entity. The Entity to associate this with is found using the caller id received or the number dialed, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the [screen popping](#). The telephone numbers used to search are set in the [screen popping](#) section.

The Activity record is automatically created with the information relating to the call entered into the *Comments* field and the related entities are linked as shown.

The screenshot shows the Salesforce 'Task Edit' page for an inbound call. The page is titled 'Task Edit' and has a green header bar with the text 'Task Inbound call from 7774441111'. The left sidebar contains a search bar, a 'Connect CTI Adapter' button, and a list of recent items. The main content area is divided into two sections: 'Task Information' and 'Description Information'.

Task Information:

- Assigned To: Dorian Geroux
- Subject: Inbound call from 7774441111
- Due Date: 25/07/2014
- Phone: 7774441111
- Priority: Normal
- Status: In Progress
- Name: Contact - Craig Kenyon
- Related To: Opportunity

Description Information:

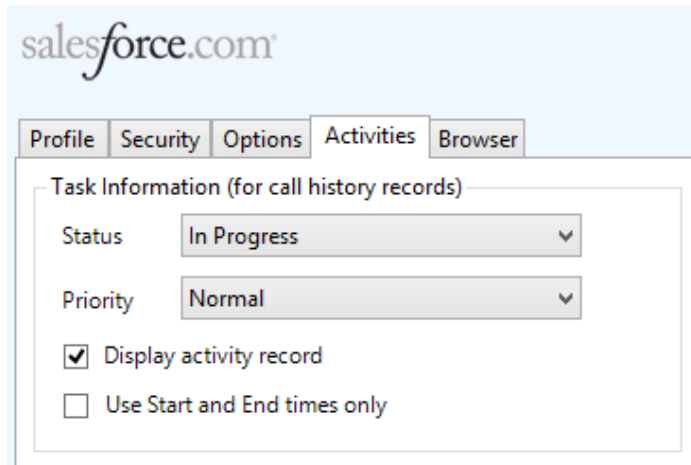
- Comments: Start Time : 25/07/2014 15:31:08, End Time : 04/08/2014 15:31:08, Call Recording : http://mitelrecorder/default.aspx?recid=1574601
- ☐ Send Notification Email

Recent Items:

- Luka Pape
- Michael Graham
- Candice Langlais
- Paloma Salamanca
- Isa Sastre
- Gary Fisher
- David Smith
- Xu Zheng
- Youssef Yount
- Mitel

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialed number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they not known until the call is cleared.
Call Recording	If integrating with a Xarios Call Recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser) The call event trigger must have been set to at least Call Answered as the call recorder only create the recording id when the call has been answered.

The plugin configuration has several options that can be set to determine how the record is created.



salesforce.com

Profile Security Options **Activities** Browser

Task Information (for call history records)

Status **In Progress** ▼

Priority **Normal** ▼

☒ Display activity record

☐ Use Start and End times only

Status: This allows the type of *Status* for the task to be configured. Valid options are: *Not Started*, *In Progress*, *Completed*, *Waiting on someone else*, *Deferred*.

Priority: This will set the priority of the Task to be *High*, *Normal* or *Low*.

Display activity record: If this is set then the Task will be displayed when it's created in a new browser window.

Use Start and End times only: If this is set then only the start and end time will be populated into the *Comments* section for a call history entry.

Configuration

For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to Salesforce.

User authentication

The plugin requires a valid Salesforce username and password to be entered. These are the details that will be used for searching and creating history records. Ensure that the user has the appropriate permissions within Salesforce to do this. As a minimum they need to have the *API Enabled* flag set on their *Profile*.

CollaborationFolder		Products
Members		
Contacts		Solutions
Content		Tasks
Contracts		
Administrative Permissions		
API Enabled	☒	Manage Mobile Configurations ☐
Assign Permission Sets	☐	Manage Package Licenses ☐
Author Apex	☐	Manage Password Policies ☐
Bulk API Hard Delete	☐	Manage Profiles and Permission ☐

Security

The Security tab enables the type of access and location of the Salesforce services to be set.

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Profile Security Options Activities Browser

Server

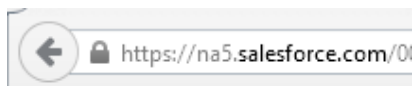
URL

Token

☐ Use security token

Security Token

Server -> URL: This should be set to Salesforce server that your organization uses. This can be found by looking at the URL that is displayed in the address bar of the web browser once you have logged into Salesforce.



Token: Depending on the security configuration of Salesforce and how it is accessed will dictate what options are required. To connect to the Salesforce API requires that the public IP address that the user is connecting from is configured in the *Administration Setup -> Network Access* section under *Trusted IP Ranges*.

Quick Find

[Expand All](#) | [Collapse All](#)

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- Call Center Settings

Administration Setup

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
 - Sharing Settings
 - Field Accessibility
 - Password Policies
 - Session Settings
- Network Access**

Network Access [Help for this Page](#) ?

The list below contains IP address ranges from sources that your organization trusts. Users logging in to salesforce.com with a browser from trusted networks are allowed to access salesforce.com without having to activate their computers.

Trusted IP Ranges New			
Action	Start IP Address	End IP Address	Description
Edit Del	78.158.57.34	78.158.57.46	
Edit Del	78.158.57.46	78.158.57.46	

If this cannot be configured, for example if you have remote workers whose IP address changes all the time. Then the Security Token option will need to be enabled.

To create a Security Token from the *Personal Setup -> My Personal Information -> Reset My Security Token* section of Salesforce.com, select the *Reset Security Token* button. This will send an email to the associated user with their Security Token.

Quick Find

[Expand All](#) | [Collapse All](#)

Force.com Home

System Overview

Personal Setup

- My Personal Information
 - Personal Information
 - Change My Password
 - Reset My Security Token
- My Groups
 - Change My Display
 - Grant Login Access
 - Calendar Sharing

Reset Security Token [Help for this Page](#)

Clicking the button below invalidates your existing token. After resetting your token, you will have to use the new token in all API applications.

When accessing salesforce.com from outside of your company's trusted networks, you must add a security token to your password to log in to the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.

Your security token is tied to your password and subject to any password policies your administrators have configured. Whenever your password is reset, your security token is also reset.

For security reasons, your security token is delivered to the email address associated with your account. To reset and send your security token, click the button below.

Reset Security Token

The email will contain the token and will look similar to the one shown below:

- y67lBpMdiBY02RkbDWqwhCEX

This value then needs to be entered into the Security Token section.