Horizon

Integrator SalesForce Guide

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Introduction

Salesforce Add-in Guide

This document will guide you through configuration and basic use of Horizon Integrator's Salesforce CRM Add-in. It is expected that you are already familiar with the Address Book, Call History and Preview window, and the basic concepts of integration and screen popping using the Add-ins. See the full user guide for these topics.

Salesforce CRM and the database used to store your contact data should already be installed and working normally before proceeding with this integration.

Salesforce Enterprise, Unlimited or Performance will work with Integrator, though Salesforce Professional is not supported.

Integrator must also be installed already with the initial configuration completed. If this is not the case, please see the full user guide or consult your Horizon administrator.

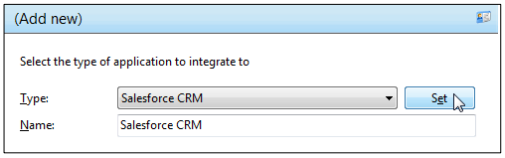
Information You'll Need;

- Windows account username and password
- Salesforce CRM security token*, username and password (if password protected)

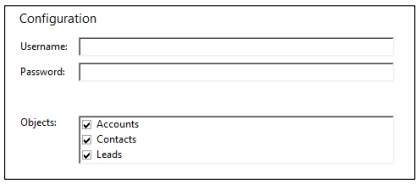
Instructions on where to find this information are given below if required

Configuration

Right-click Integrator's tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up. In the 'Integration' area, click the '(Add new)' button, select 'Salesforce CRM' from the 'Type' dropdown box and then click the 'Set' button.

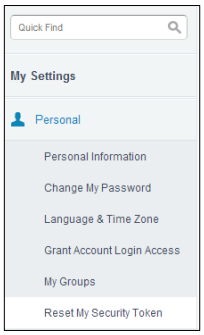


On the 'Configuration' group, enter your Salesforce CRM account login information.



Salesforce CRM uses an additional security measure called a security token which needs to be added to the end of your password e.g. if your password is 'mypassword' and your security token is 'XYZ123', you should type 'mypasswordXYZ123' into the 'Password' box.

If you're not sure what your security token is, you can reset it by logging into your Salesforce CRM account and then going into your name account's "Settings" page by clicking the option near the top-right corner.



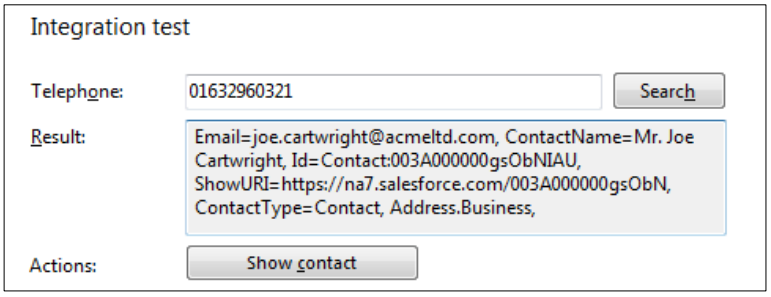
Then, in the 'My Personal Information' group of settings, click on the link that says 'Reset your security token' and follow the instructions on the page that is loaded. Your new security token will be sent to your registered email address and that's all there is to do in Salesforce CRM itself.

Back on Integrator's 'Configuration' group, select which of your Salesforce CRM account modules you want to be used by ticking the corresponding boxes in the 'Objects' section.

Click the 'Save' button to store the information you've entered and apply the configuration.

Testing

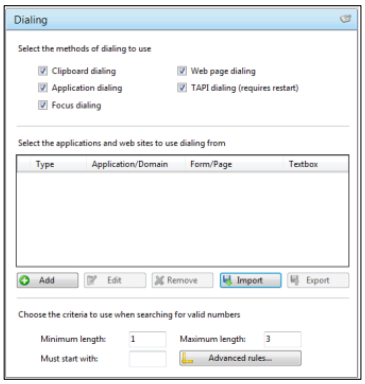
To test if the configuration worked, enter a phone number from your Salesforce CRM account into the ‘Telephone’ box and click the ‘Search’ button. The results will be displayed after a few seconds.



The test area results should look similar to the results showing in the figure above. If the test does not work, go to the ‘Log’ page of configuration and turn on logging, then do the test again and see if there are any errors in the log.

Dialling configuration

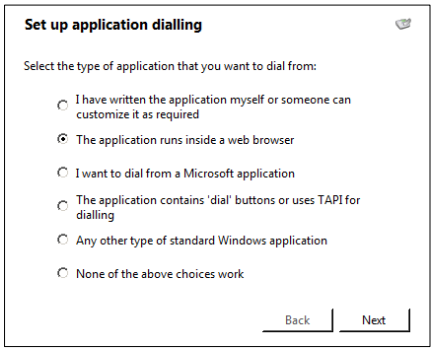
To dial out from within Salesforce CRM, dialling needs to be configured correctly.



Right-click the tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up, this will open the 'Configuration' screen. In the 'General' group, click on the 'Dialling' option.

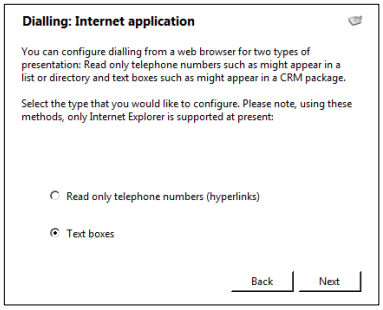
Make sure the 'Web page dialling' box is ticked. This converts the telephone numbers identified on web pages into hyperlinks you can click to dial the number.

You can refine the criteria used to identify telephone numbers. Enter the appropriate number of digits into the 'Minimum length' and 'Maximum length' text boxes and specify a prefix that identifies telephone numbers (if there is one) by entering it in the 'Must start with' box

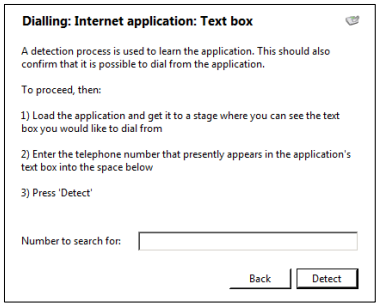


If you would like to be able to dial directly when you are entering new information in Salesforce CRM e.g. on the new contact page, we need to carry out some further configuration so click the 'Add' button to start Integrator's Dialling wizard.

The first question in the wizard asks you about the type of application you want to dial from. Select the 'The application runs inside a web browser' option. Click the 'Next' button.



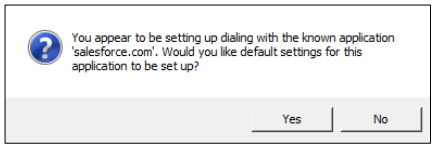
We've already covered converting identified numbers into hyperlinks so select the 'Text boxes' option on the second screen of the wizard and click the 'Next' button.

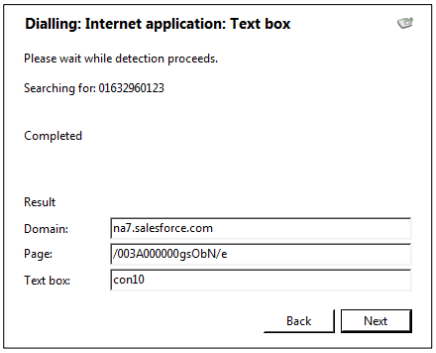


Open your Salesforce CRM account in Internet Explorer and find the text box you want to dial out from, it needs to have a number in it already. Copy or make a note of the telephone number currently displayed in the text box and leave the web page open.

Back in Integrator's wizard, paste or type the number into the 'Number to search for' box and click the 'Detect' button.

The wizard recognises that you are setting up dialling with Salesforce CRM and asks you if you would like to use the default settings for it. These are fine for most users so click 'Yes'.





If you want to dial from a text box not included in the default settings, you will need to add it manually. Follow the instructions above starting with clicking the ‘Add’ button again and working through as before but click ‘No’ if asked whether you want to setup default settings.

The wizard will search the current web page for the telephone number you entered and, once found, display the details. Click ‘Next’ and then ‘Close’.

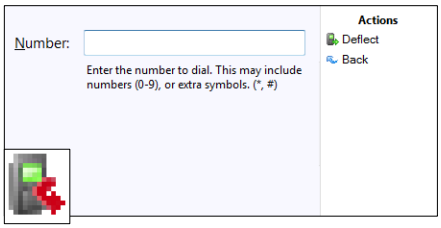
You can add as many textboxes as you like, just start the process by clicking the ‘Add’ button and working your way through again.

Click ‘Save’ to store your settings and you’re ready to go. Now, a clickable icon is placed at the end of any textboxes you have configured and you just click on it to dial the number in the textbox. Refresh the page in Salesforce CRM to see it in action.

Functionality

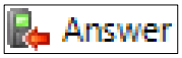
When a call comes in, integrator's 'Preview Window' will pop up and display the phone number that is calling. If the caller is recognised as one of your contacts from Salesforce CRM, their details will also be displayed and you can 'pop' their contact record by clicking the 'Salesforce CRM' button in the window.

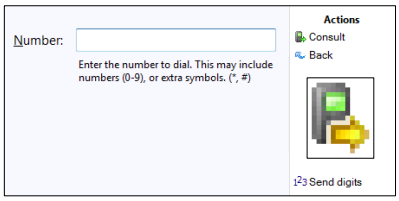
You can also pop recognised callers' contact records by clicking the 'Salesforce CRM' button on the 'Phone Window'.

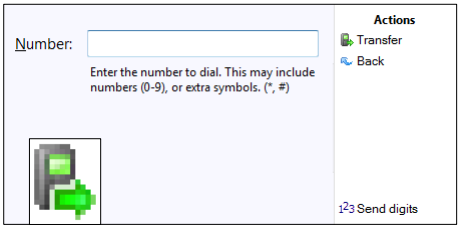


Calls can be deflected to another extension before answering them by clicking the 'Deflect' button, entering the extension number and clicking 'Deflect' again.

To answer a call on either the 'Preview' or 'Phone' window, you just need to click the 'Answer' button.





To speak to a colleague during an active call, click the 'Consult' button, enter the extension number and click 'Consult' again; the active call is automatically held. To end the call to your colleague and resume the held call, click 'Cancel'.

To transfer a call to another extension, click the 'Transfer' button, enter the extension number and click 'Transfer' again.