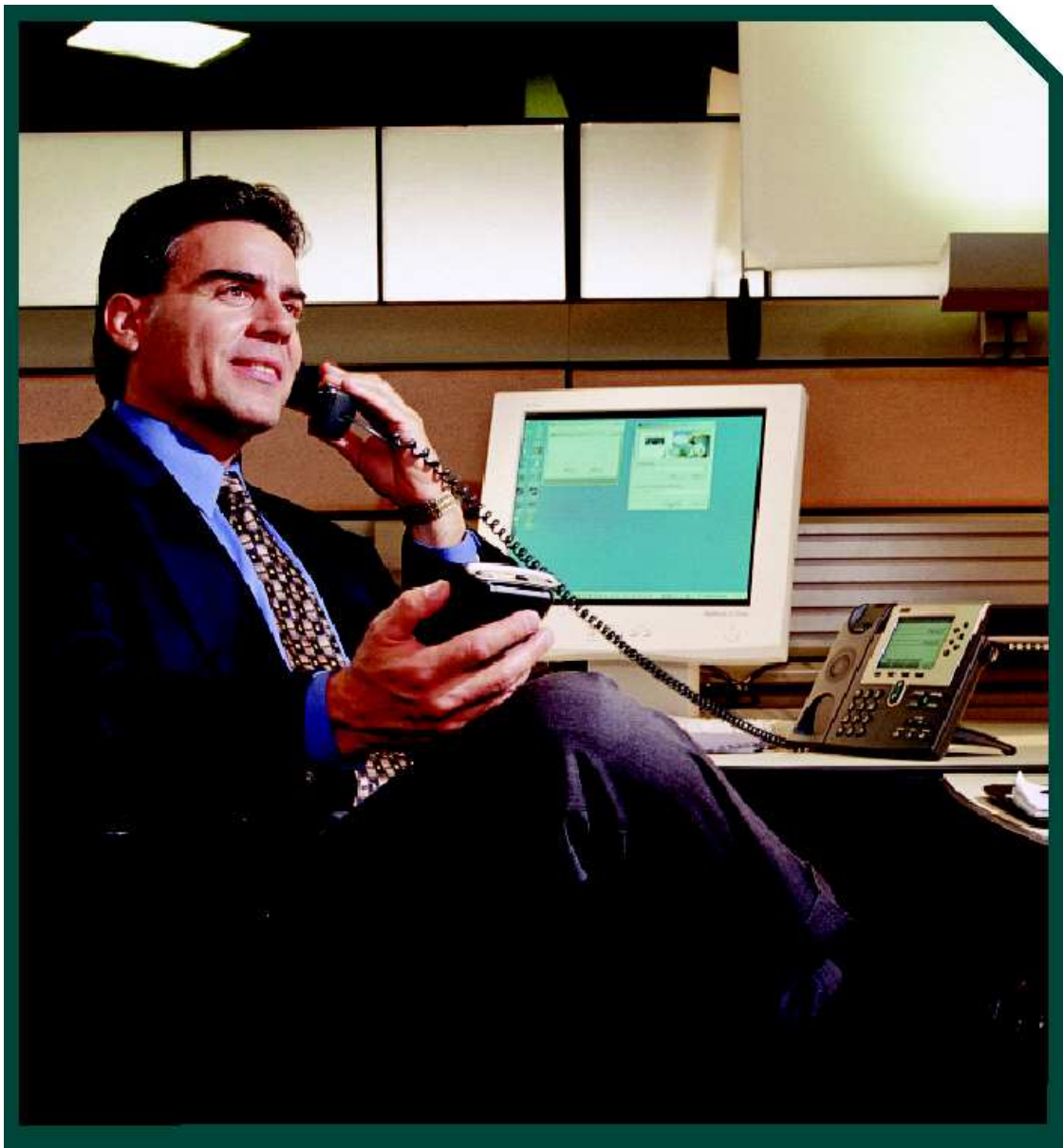


Cisco Unified CallConnector for Salesforce.com

Version 1.3.2



Contents

INTRODUCTION	3
System Requirements.....	3
TAPI Integration System Requirements	3
ACMI Integration System Requirements.....	3
INSTALLATION OF THE CLIENT.....	4
Installing the Client	5
Configuring the Cisco Unified CallConnector Client.....	10
Administrative Configuration	10
Client Configuration	12
Logging Configuration	13
Starting the adapter	14
USING THE CALLCONNECTOR.....	15
General Usage.....	15
Call Detection	15
Call Control	16
Call Duration Tracking.....	16
Click-to-Dial.....	17
For More Information.....	17
Product Links.....	17

Introduction

The Cisco® Unified CallConnector for Salesforce.com is part of the Cisco Unified Communications family of products. The CallConnector integrates Cisco IP-based communications with the Salesforce.com Customer Relationship Management application to provide small and medium-sized business (SMB) and enterprise customers with an easy-to-use and more complete CRM solution. The Cisco Unified CallConnector for Salesforce.com quickly and easily integrates Cisco Unified Communications solutions with Salesforce.com at the desktop, without requiring additional hardware.

The CallConnector is a desktop-based application that is partially centrally configurable and supports the following primary features in Cisco IP telephony:

- Automatic detection and screen-pop searches of the CRM database for both incoming and outgoing phone calls
- Automatic creation of phone call activity records for incoming and outgoing calls with call duration tracking
- Click-to-dial from the Salesforce.com user interface
- Integration with Cisco Unified Communications, Cisco Unified Communications Manager Express, and Cisco Unified Contact Center Express

These features allow CRM users to provide improved service by personalizing their interaction with callers. It also helps to enforce administrative policy for creating phone call activity records.

System Requirements

The following outline the system requirements for the Cisco Unified CallConnector for Salesforce.com:

- Operating Systems: Microsoft Windows XP, Microsoft Vista, or Windows 7
- For TAPI Integration:
 - Machine Architecture: x86
 - Cisco TSP (See below)
- Salesforce.com Call Center enabled account

TAPI Integration System Requirements

- The Cisco TSP appropriate for the telephony environment (Unified Communications Manager or Unified Communications Manager Express) must be installed, configured, and able to receive TAPI events on all machines that will be used as a Salesforce.com client

ACMI Integration System Requirements

- Contact Center Express, Premium Edition

Installation of the Client

The installation process is supported by Virtual Network Computing (VNC) and other remote control desktop software, but is not supported by Terminal Services.

If you intend to integrate with either Unified Communications Manager or Unified Communications Manager Express, one of the following software packages must be installed for proper functioning of the Cisco Unified CallConnector:

- Cisco Unified Communications Manager TAPI TSP (if integrating with Cisco Unified Communications Manager).
- Cisco Unified Communications Manager Express TSP (if integrating with Cisco Unified Communications Manager Express). You can obtain the latest version of this file from the Cisco.com software center downloads for Cisco Unified Communications Manager Express.

Although it is not strictly necessary, it is recommended that the TSP be installed and functional prior to installation of the CallConnector client.

If you are integrating with Cisco Contact Center Express (Premium), then no additional requirements are necessary.

Installing the Client

To install the Cisco Unified CallConnector client, first ensure that you are logged on as a user with administrative privileges. In addition, for best user experience, the TAPI TSP client software appropriate for the integration method being used should be installed, configured, and properly functioning.

To begin the installation of the client, locate and double-click the MSI setup file associated with the Cisco Unified CallConnector for Salesforce.com client component. You will then be presented with a standard set of installation dialogs (Figure 1). Click “Next” to begin installation.

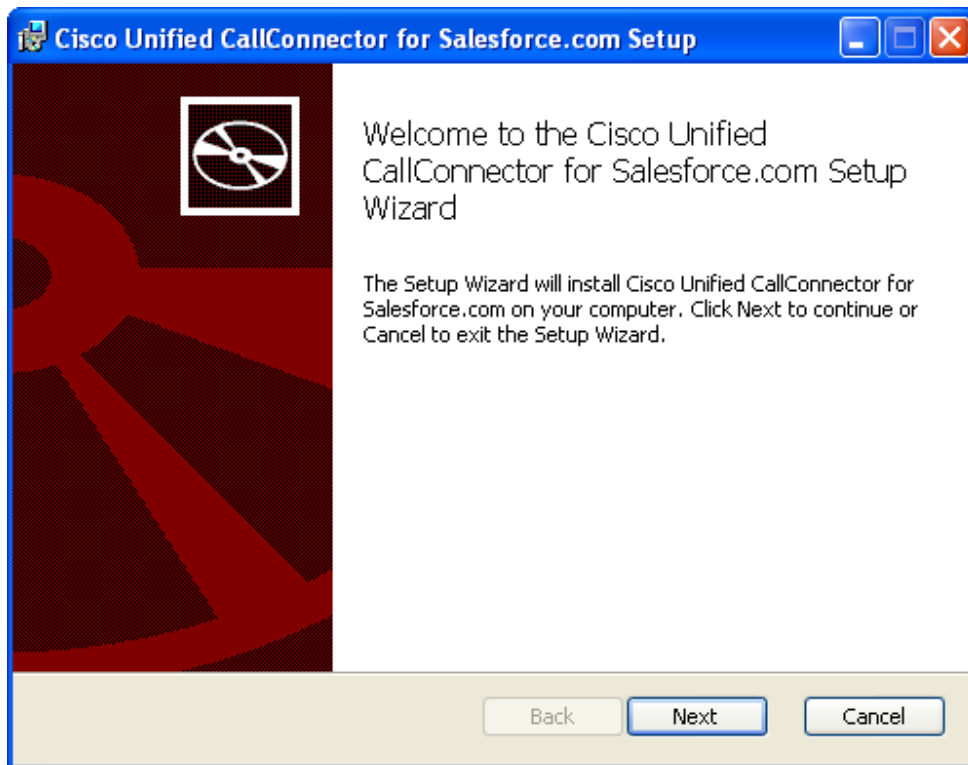


Figure 1: Initial Client Installation Screen

The next dialog prompts you to read and accept the license agreement for the software product. Click the check box that says “I accept the terms in the License Agreement” and click ‘Next’.



Figure 2: The software license agreement

After accepting the license agreement, the installer prompts you for which features you would like to install. You must install the main application, but you may choose to install either the Cisco Communications Manager adapter, or the Unified Contact Center Express adapter, or both. You must select at least one of the two adapters if you wish to run the adapter on the machine that the software is being installed on. The default is to install the main application and the CCM adapter.

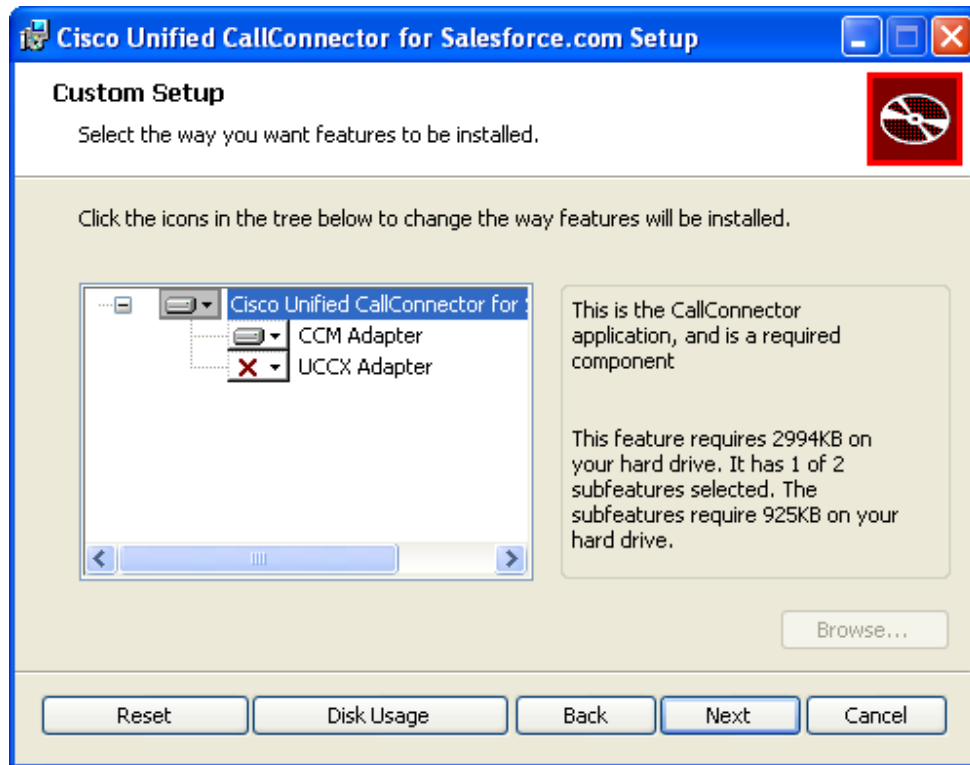


Figure 3: Specifying the installation features

Finally, confirm that the installation should continue by clicking “Install” as seen in Figure 4.

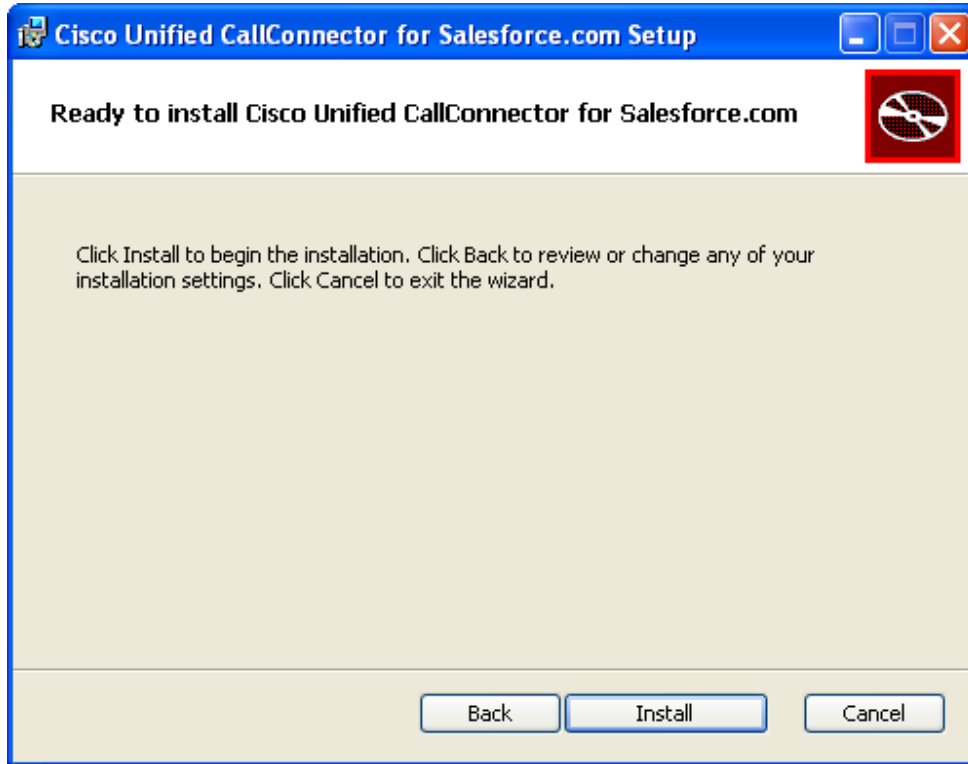


Figure 4: Confirm Installation dialog

The installation will now proceed, and will finish with a success dialog. The client is now installed and ready to run from the Start Menu.

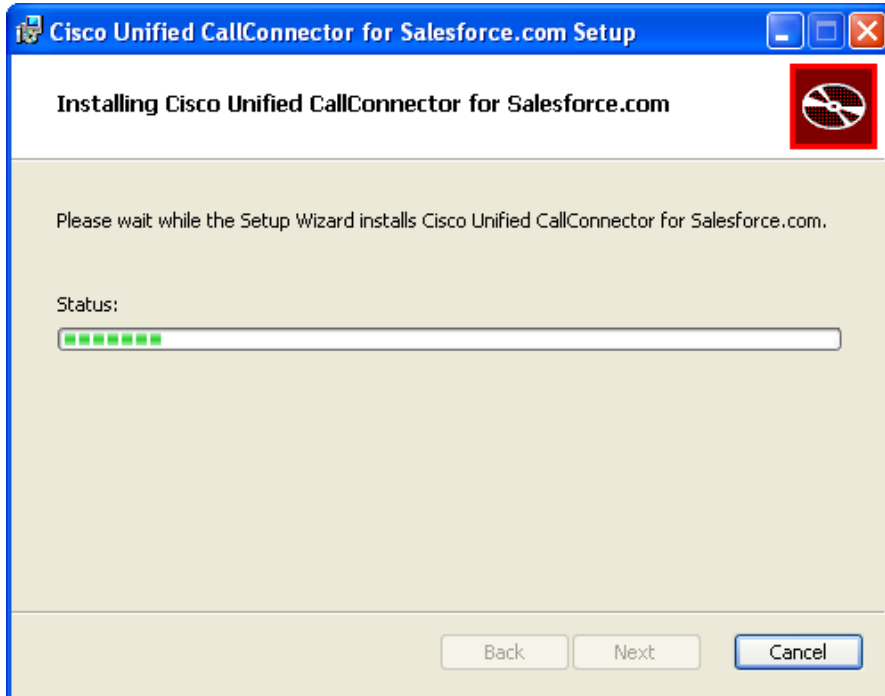


Figure 5: The installation progress dialog

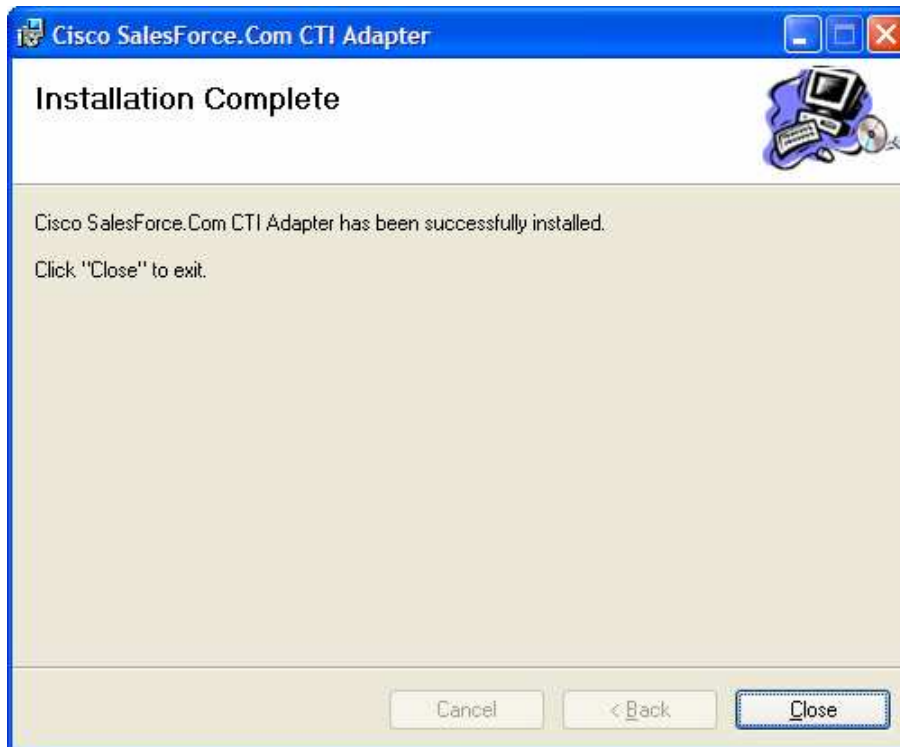


Figure 6: Installation complete dialog

Configuring the Cisco Unified CallConnector Client

Administrative Configuration

The client needs to be installed on each user's system that wishes to use the software. However, the administrator must also perform a one-time configuration for the call center into which users will be grouped. This step requires a file to be uploaded to the Salesforce.com server that contains predefined parameters necessary for the proper operation of the client. This file is installed at the same time as the client adapters, so it may be necessary for an administrative user to install it on a machine just to obtain this file. It is also possible to install it on a client, and use that workstation as the source of the administrative configuration. Once the configuration is uploaded, additional (re)configuration can be performed from any machine.

The administrator for a company has two primary tasks:

1. Install and configure the Call Center definition
2. Add users to the call center

To install the call center, log in to Salesforce.com as the administrator for the company and select "Setup". Then under the "App Setup" heading, expand "Customize", then expand "Call Center Edition", and finally click the "Call Centers" option.

In the Call Center configuration, click "Import" – this will provide an upload form. Click the "Browse..." button and select the appropriate call center definition file included in the client installation directory. If you are integrating with TAPI, this file is "CiscoAdapter.xml". If you are integrating with Unified Contact Center Express (ACMI), this file is "CiscoACMIAdapter.xml". Continue to upload the file, and confirm the parameters shown.

To add users to the Call Center, click "Manage Call Center Users", and then click "Add More Users". Specify any search parameters necessary and then click "Find". Users that are not currently associated with a Call Center will be listed and may be selected for membership in the call center by checking the boxes next to their names and clicking "Add to Call Center".

Administrative Configuration of the TAPI Adapter

Most of the administrative configuration of the TAPI Adapter can be left at default values. The following table describes the values that can be configured.

Configuration Item	Value
Internal Name	The name of the connector. This value should not be edited. The default is "CiscoSalesForceAdapter"
Display Name	The public display name of the connector. The default is "Cisco Unified CallConnector for Salesforce.com Call Center Adapter".
Description	The description of the adapter.
CTI Connector ProgId	A code that allows the correct adapter to be loaded. This

	value must be “CiscoAdapter.CiscoAdapter.1”
Outside Prefix	The digits to dial to get an outside line. Default is ‘9’
Long Distance Prefix	The digits to dial when placing a long distance call. Default is ‘1’.
International Prefix	The digits to dial when placing an international call. Default is ‘011’.
Maximum Digits for Internal Calls	The maximum number of digits for which the adapter will assume the call is an internal call. Default is 4.
Keep Call Logs Open	Determines whether call logs are kept open after a call ends or automatically closed. To keep them open, specify ‘1’; to close them, specify ‘0’. Default is 1.

Administrative Configuration of the ACMI Adapter

Most of the configuration of the ACMI Adapter is performed with default values. The following table describes the values that can be configured.

Configuration Item	Value
Internal Name	The name of the connector. This value should not be edited. The default is “CiscoACMISalesForceAdapter”
Display Name	The public display name of the connector. The default is “Cisco Unified CallConnector for Salesforce.com ACMI Call Center Adapter”.
Description	The description of the adapter.
CTI Connector ProgId	A code that allows the correct adapter to be loaded. This value must not be edited, and the value must be “CiscoACMIAdapter.CiscoACMIAdapter.1”
Outside Prefix	The digits to dial to get an outside line
Long Distance Prefix	The digits to dial when placing a long distance call
International Prefix	The digits to dial when placing an international call
ACMI Server Address	The IP address of the ACMI Server (CCX). This should be filled in with the IP Address of your Contact Center Express Premium Edition server.
ACMI Server Port	The TCP/IP port that the ACMI Server is operating on. Default is 42027.
Maximum Digits for Internal Calls	The maximum number of digits for which the adapter will assume the call is an internal call. Default is 5.
Call Variable [1..5]	Allows call data to be included in the Salesforce search mechanism. See the section below titled “Attaching ACMI Call Data to a Salesforce search” for more details.
Keep Call Logs Open	Determines whether call logs are kept open after a call ends or automatically closed. To keep them open, specify ‘1’; to close them, specify ‘0’. Default is 1.

Attaching ACMI Call Data to a Salesforce.com search

Callers in a Contact Center Express environment may be prompted for certain information that may be useful during the search for matching records. For example, they may key in their account number. To include this information in the Salesforce.com search, up to 5 Call Variables may be attached to the search mechanism by configuring appropriate directives in the Call Center configuration.

Each variable may be in one of three formats that will attach data to the search, depending on how the variable is configured in CCX:

1. Numbered Variables: <#>=<SalesforceObject.SalesforceField>
2. Named Variables: <Name>=<SalesforceObject.SalesforceField>
3. Named Array Variables: <Array>.<#>=<SalesforceObject.SalesforceField>

For example, if the named variable in CCX is called 'acctnum', then you would specify "acctnum=Account.AccountNumber".

Any other text in these fields that doesn't conform to one of the above formats is ignored.

Client Configuration

The client is configured by actually running the application and accessing the configuration menus from within. For instructions on starting the adapter, see the section titled "Starting the adapter".

Currently, the only module that requires configuration is the TAPI module. If you are integrating with Unified Contact Center Express, no configuration of each individual client is necessary. All configuration parameters are specified by the administrator. However, each individual Contact Center Express user must log in using their own account/extension and password.

The remainder of this section assumes that you are integrating with TAPI.

If this is the first time the adapter is started, you may initially receive an error if integrating with TAPI (see Figure 7). This error simply means that the user has not selected a TAPI line to monitor. Complete the selection of the line as described below to begin monitoring the TAPI line.



Figure 7: The initial startup TAPI Connection error

To access the client configuration, right-click the application icon in the icon tray, and select "Configure...". The TAPI line selection configuration window appears, as shown in Figure 8.

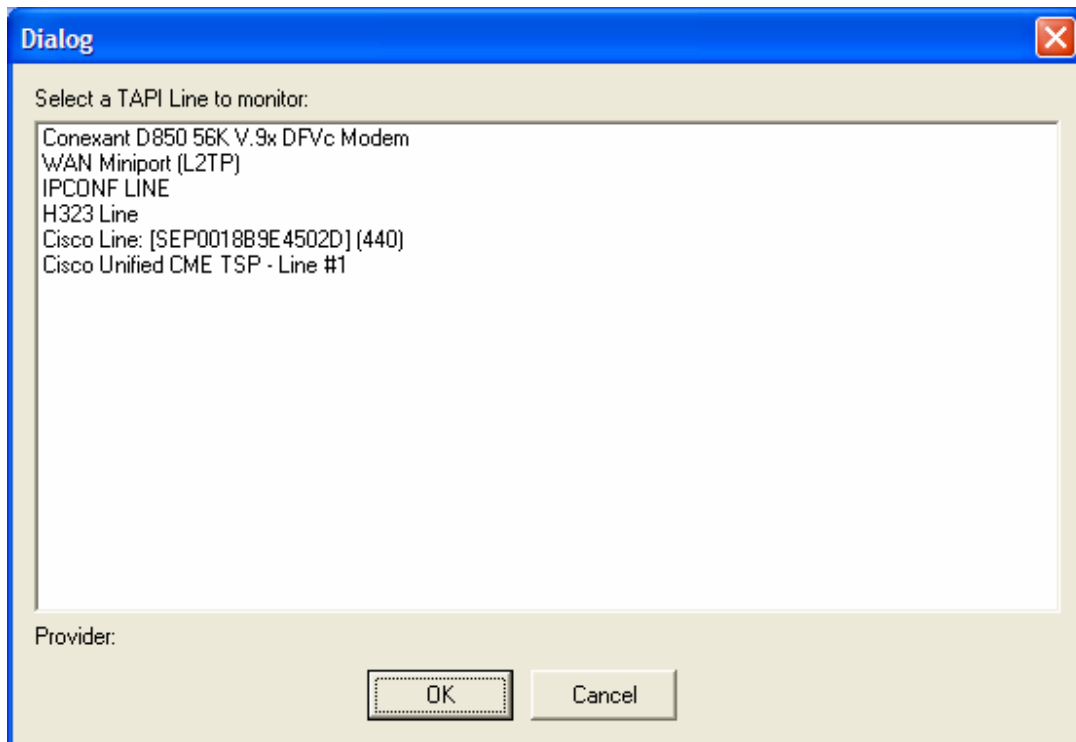


Figure 8: The TAPI Line Selection configuration dialog

You must select a valid TAPI line to monitor. If you do not see any valid lines (they are always marked with the 'Cisco' name) then either your TSP isn't installed and configured properly, or the administrator hasn't enabled your line for TAPI monitoring. Select the appropriate line to monitor and hit OK. The "TAPI Connection Failed" error should be replaced with the standard monitor window, shown in Figure 9.

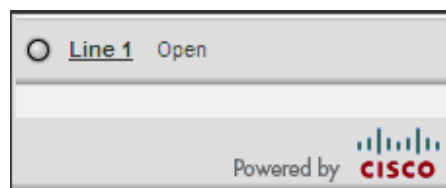


Figure 9: The standard monitor window

Logging Configuration

You may change the logging options by right clicking on the system tray icon, and selecting "Logging...". The logging options screen displays. Here you can modify the amount of logging as well as the location of the logging files.

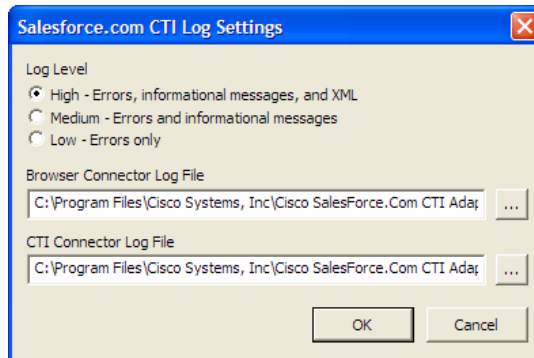


Figure 10: The logging configuration dialog

Starting the adapter

To start the adapter, you must perform two actions:

1. Start the desktop monitor application
2. Log into a Contact Center enabled account in Salesforce.com

To start the adapter, simply locate the Start Menu item that is installed. By default, it is installed in Start Menu / Programs / Cisco Systems / Cisco Unified CallConnector for Salesforce.com". It is also placed in the Startup menu, so by default it should start up when the system is rebooted.

Once you have the adapter desktop application running and you log in to a Contact Center enabled account in Salesforce.com, you will notice a new window pane available in the Salesforce.com layout, indicating that the client is starting up, as shown in Figure 11.

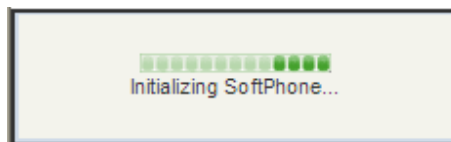


Figure 11: Adapter initialization window

After the adapter has finished loading and has received its configuration, it will show the final monitor window, as shown in Figure 12.

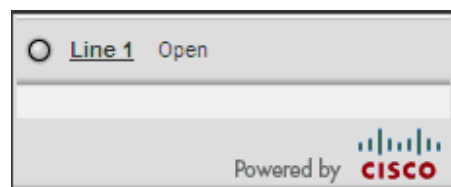


Figure 12: Adapter is loaded and ready

The Client is now monitoring the line (using either TAPI or ACMI) and is now ready to be used.

Using the CallConnector

General Usage

There are four primary uses of the connector:

1. Call detection
2. Call control
3. Call duration tracking
4. Click-to-dial

Call Detection

When a call is received or placed, the adapter will detect the incoming or outgoing phone number and will automatically perform a search in the Salesforce.com database, attempting to locate records with matching phone numbers. For an inbound call, the adapter pane will change to something similar to that shown in Figure 13.

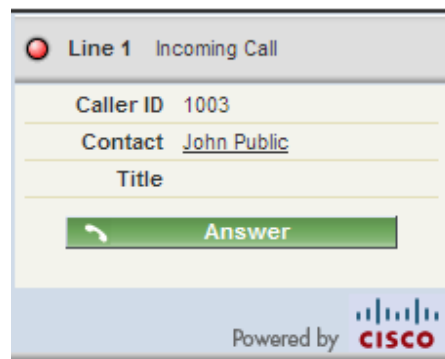


Figure 13: An example inbound call

Note that the contact has been identified, and the client provides a button that can be used to answer the call directly from the desktop. Once the call is connected, the client enables a call log where the user can take notes on the call, and also provides additional buttons to support call transfer, conference, and other features as shown in Figure 14. Note that some of these features may not be available in certain circumstances.

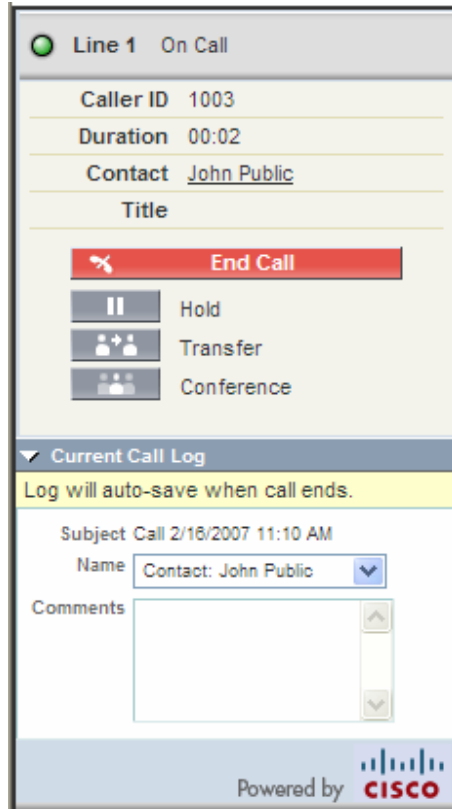


Figure 14: The call log and an active call

Call Control

Call control for answering calls has already been partially demonstrated in the previous topic. Additional call control features that may be available to you are:

- End Call
- Hold / Retrieve
- Transfer
- Conference

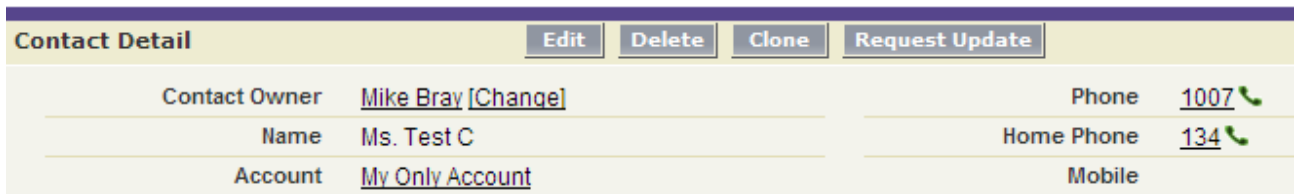
Most of these are fairly self-explanatory, as the buttons are provided only when that feature is available. In addition, you are able to place a call directly from the interface. To dial directly from the interface, click on the "Line 1" title for the line being monitored. A dialpad will appear allowing you to key in the digits and place the call.

Call Duration Tracking

The client will automatically create call logs for the user. When the call ends, the call log will reflect the time spent on the call.

Click-to-Dial

To use the click-to-dial feature, simply navigate to any record in Salesforce.com that contains a phone number. The phone number should appear underlined and with a phone icon next to it, as shown in Figure 15. To use click-to-dial, simply click the phone number or the phone icon. The client will detect this and will dial the phone automatically. Note that the client will perform some basic processing of the phone number (such as adding 9) to enable calling certain numbers, but complicated scenarios may require manual dialing.



The screenshot shows a 'Contact Detail' screen with a header bar containing 'Edit', 'Delete', 'Clone', and 'Request Update' buttons. Below the header, there are three rows of contact information. The first row shows 'Contact Owner' as 'Mike Bray [Change]' and 'Phone' as '1007' with a phone icon. The second row shows 'Name' as 'Ms. Test C' and 'Home Phone' as '134' with a phone icon. The third row shows 'Account' as 'My Only Account' and 'Mobile' as an empty field.

Contact Detail		Edit	Delete	Clone	Request Update
Contact Owner	<u>Mike Bray</u> [Change]				Phone <u>1007</u> 📞
Name	Ms. Test C				Home Phone <u>134</u> 📞
Account	<u>My Only Account</u>				Mobile

Figure 15: A contact screen showing click-to-dial enabled phone numbers

For More Information

Product Links

For more information on SalesForce.com, visit:

<http://www.salesforce.com>

For more information on Cisco Unified Contact Center Express, visit:

<http://www.cisco.com/en/US/products/sw/custcosw/ps1846/index.html>

Support Aliases

For assistance on configuring and using Cisco Agent Desktop, send e-mail to:

Ask-cad@external.cisco.com

For assistance on Cisco Unified Contact Center Express, send e-mail to:

Ask-icd-ivr-support@external.cisco.com

For product plans and marketing information, send e-mail to:

Ask-icd-ivr-pm@external.cisco.com