Cisco Unified CallConnector for Salesforce.com

Call Center Adapter Installation and User Guide

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Contents

Installation

Prerequisites

One of the following Cisco® Telephony Service Providers must be installed on the client machine.

- Cisco Unified CallManager TSP
- Cisco Unified CallManager Express TSP v2.1.0.8

Adapter Installation

1. Run setup.exe

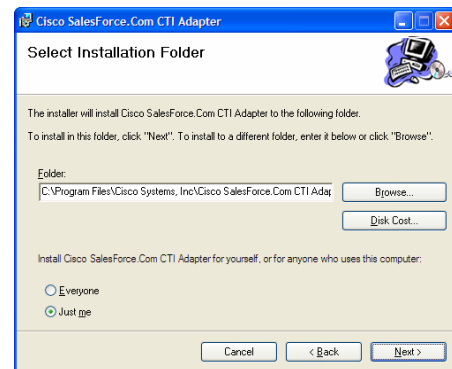2. Welcome screen displays.

   Click "Next".
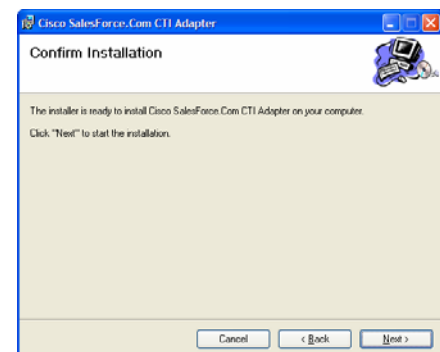
3. Installation folder screen displays.

   Use the default folder (recommended), or select a new location to install the adapter in.
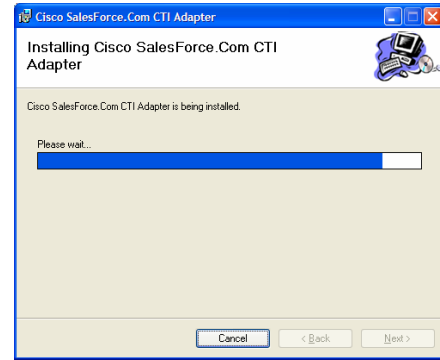
   Click "Next".

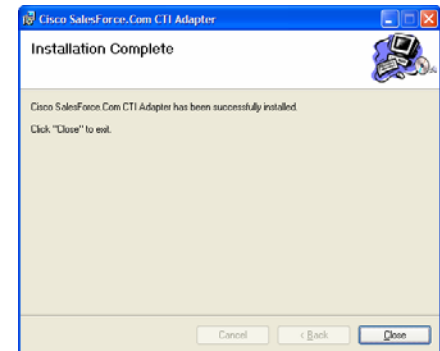4. Installation confirmation screen displays.

   Click "Next".

5. Installation progress displays.

6. Installation complete screen displays.

   Click "Close".

Adapter Administration

The administrator for a company must enable users to utilize the call center functionality of SalesForce.com. This is performed from the SalesForce.com Web interface, and requires the following steps:

1. Use your browser to go to http://www.salesforce.com/login.jsp, and log in.

2. Select the **Setup** link at the top of the SalesForce.com screen

3. In the left-side menu, under the **App Setup** heading, click ⊞ Customize , and then click ⊞ Call Center Edition. If this link does not appear, contact your SalesForce.com support representative.

4. Select the Call Centers option. The detail window at right will list any currently installed call centers.

5. Click the **Import** button – this will provide an upload form. Click **Browse...** and select the file 'CiscoAdapter.xml' in the application installation directory.

6. Confirm the parameters shown (outdial code, long distance code, and international code).

7. Click **Manage Call Center Users**. The User Management screen appears.

8. Click **Add More Users**. Specify any search parameters (this is optional) 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 finally clicking **Add to Call Center**.
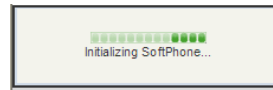
Adapter User Guide

Starting the Adapter

Use your browser to go to http://www.salesforce.com/login.jsp, and log in.

From the Windows Start menu, select:
- All Programs
- Cisco Systems
- Cisco Unified CallConnector for Salesforce.com

The icon appears in the system tray at the lower left of the screen.

The left side of the Webpage will display a message.	Initializing SoftPhone...
The first time the adapter is started, the left side of the Webpage will display a message.	**TAPI CONNECTION FAILED** Powered by CISCO
Right click on the icon in the system tray. Select "Configure".	Configure... Logging... About... Exit
The configuration screen will display.	
Select the appropriate TAPI line to monitor.	
Click "OK". If this is the first time configuring the TAPI line, you must restart the application (as below).	
Right click on the icon in the system tray. Select "Exit".	Configure... Logging... About... Exit
Restart the adapter.	
The left side of the Webpage will display:	Initializing SoftPhone...
After a few seconds, the left side of the Webpage will display a line status.	○ Line 1 Open Powered by CISCO
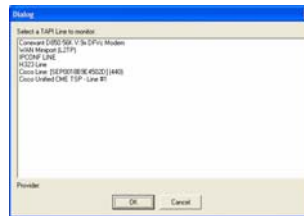
Logging

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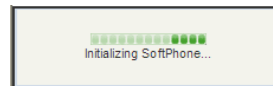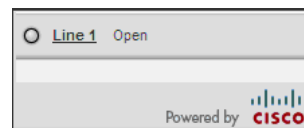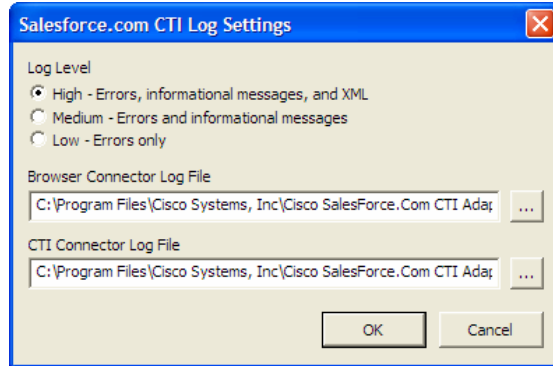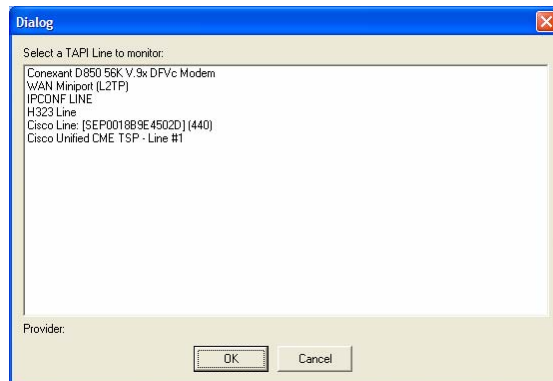

Configuration

You may change the TAPI line the adapter will monitor by right clicking on the system tray icon. The configuration screen displays.
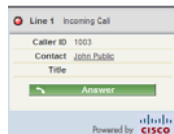

Select the TAPI line to monitor and control and click "OK".
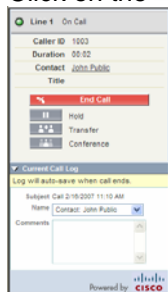
Using the Adapter

Click to Answer

Use this feature to answer an incoming call.

1. When an incoming call is detected it is displayed on the Webpage.

2. Click on the [Answer] button. This displays the call detail information.

Click to Dial

Use this feature to dial a number from a contact.

1. From the Contact Home Page

or Contact Detail Page

Click on an underlined phone number to initiate the call. The phone number will be processed according to the dialing rules set up by the administrator. Any portion of the phone number after an 'x' or 'X' character (indicating a phone extension) will be truncated.

Conference - One Step

Use this feature to conference a call with another number. The one-step conference completes the conference immediately when the additional number answers the phone.

1. Click on the Conference button. This displays the conference dial pad.

2. Enter the number to dial by:
   a. Typing a number
   b. Clicking on the dial pad number buttons
   c. Clicking on the "Open Directory" button and selecting a contact's phone number

3. Click the button. This dials the new number on a second line.

4. If the person being added to the conference answers the phone, the second line display is removed.

5. If the person being added to the conference does not answer the phone, click the button on the second line. This ends the call on the second line and the original call remains active on the first line.

Conference - Two Step

Use this feature to conference a call to another number. The two-step conference allows you to speak to the person that is being added to the conference before the conference is completed.

1. Click on the ▣ Conference button. This displays the conference dial pad.

2. Enter the number to dial by:
   a. Typing a number
   b. Clicking on the dial pad number buttons
   c. Clicking on the ▣ "Open Directory" button and selecting a contact's phone number

3. Click the **Initiate Conference** button. This dials the new number on a second line.

4. If the person being added to the conference to answers the phone, the second line display is changed.
   a. A call duration timer is displayed.
   b. The normal call in progress buttons are displayed.

   c. If the person being added to the conference does not answer the phone, click the **End Call** button on the second line. This ends the call on the second line and the original call remains active on the first line.

Dial a Number

Use this feature to manually dial a number from the Webpage.

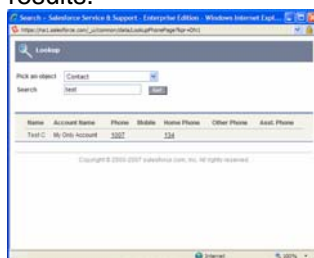1. Click on the line number of a line that is open on the left side of the Webpage.

    This displays the dial pad.

2. Enter the number to dial by:
    a. Typing a number
    b. Clicking on the dial pad number buttons

    c. Clicking on the "Open Directory" button. This displays the lookup screen.

    Select the object type and search criteria and click the button to display the search results.


    When you have found the appropriate contact, click on the underlined number you want to dial. This closes the lookup screen and places the number in the dial area.

3. Click on the button to initiate the call.

Hold - Place a Call On Hold

Use this feature to place a call on hold from the Webpage.

1. Click on the [❚❚ Hold] button. This changes the call detail display.
   - The line status indicator changes from green to yellow.
   - A hold timer is displayed.
   - The call buttons are replaced with a "Retrieve From Hold" button.
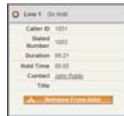
Hold - Retrieve a Call From Hold

Use this feature to retrieve a call on hold from the Webpage.

1. Click on the [⚘ Retrieve From Hold] button. This changes the call detail display.
   - The line status indicator changes from yellow to green.
   - The hold timer is removed.
   - The "Retrieve From Hold" button is replaced with the normal call buttons.

Transfer - One Step

Use this feature to transfer a call to another number. The one-step transfer completes the transfer immediately and ends the call on your phone.

1. Click on the ▤ Transfer button. This displays the transfer dial pad.

2. Enter the number to dial by:
   a. Typing a number
   b. Clicking on the dial pad number buttons

   c. Clicking on the ▤ "Open Directory" button and selecting a contact's phone number

3. Click the ▤ One-Step Transfer button. This immediately transfers the call to the new number and returns the line to the open status.

Transfer - Two Step

Use this feature to transfer a call to another number. The two-step transfer allows you to speak to the person the call is being transferred to before the transfer is completed.

1. Click on the [👥 Transfer] button. This displays the transfer dial pad.

2. Enter the number to dial by:
   a. Typing a number
   b. Clicking on the dial pad number buttons
   c. Clicking on the [🔍] "Open Directory" button and selecting a contact's phone number

3, Click the [↰ Initiate Transfer] button. This starts a call on a second line to the number being transferred to.

4. If the person the call is being transferred to does not answer the phone, click the [✕ End Call] button. This ends the call on the second line and the original call remains active on the first line.

5. If the person the call is being transferred to answers the phone, the second line display is changed.
   a. A call duration timer is displayed.
   b. The normal call in progress buttons are displayed.

6. If the person the call is being transferred to does not want to take the call, click the [✕ End Call] button. This ends the call on the second line and the original call remains active on the first line.

7. If the person the call is being transferred to accepts the call, click the [↰ Complete Transfer] button. This transfers the call to the new number, ends the call on the second line and returns the first line to the open status.