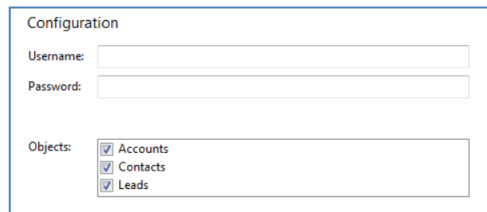# Salesforce CRM - Integration Guide

This document will guide you through configuration of the Salesforce CRM addin. It is expected that you are already familiar with the Address Book and Preview window, and the basic concepts of integration and screen popping using the addins. See the User Guide for these topics. Your Salesforce CRM account needs to be an 'Enterprise' type account to use this integration.

Configuration

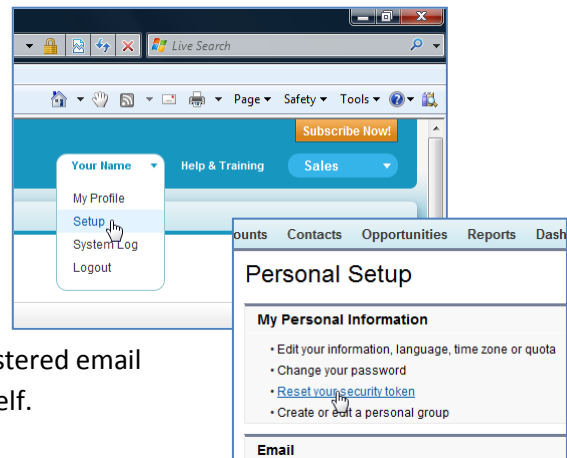On the 'Configuration' group, enter your Salesforce CRM account login information.

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 account's 'Setup' pages by clicking the option near the top-right corner.
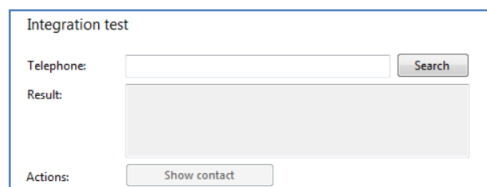
Then, in the 'My Personal Information' group of settings, click on the link that says 'Reset your security token' and follow the instructions on the page that is loaded. Your new security token will be sent to your registered email address and that's all there is to do in Salesforce CRM itself.

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

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.

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 the 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.

Dialling: Internet application: Text box

A detection process is used to learn the application. This should also confirm that it is possible to dial from the application.

To proceed, then:

1) Load the application and get it to a stage where you can see the text box you would like to dial from

2) Enter the telephone number that presently appears in the application's text box into the space below

3) Press 'Detect'

Number to search for: [   ]

[Back] [Detect]

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 the 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'.

You appear to be setting up dialing with the known application 'salesforce.com'. Would you like default settings for this application to be set up?

[Yes] [No]

Dialling: Internet application: Text box

Please wait while detection proceeds.

Searching for: 01632960123

Completed

Result

Domain: eu1.salesforce.com
Page: /003/e
Text box: con10

[Back] [Next]

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.