



InGenius CRM Integration for Salesforce

IT Admin Guide

IT Administrator's Guide – InGenius CRM Integration for Salesforce
September 2011

TRADEMARKS

InGenius, InGenius CRM Integration for Salesforce and the InGenius logo are trademarks of InGenius Software Inc. Windows, XP, Vista and Microsoft are trademarks of Microsoft Corporation. Adobe Acrobat Reader is a registered trademark of Adobe Systems Incorporated. Other product names mentioned in this document may be trademarks of their respective companies and are hereby acknowledged.

Table of Contents

1	ABOUT INGENIUS CRM INTEGRATION FOR SALESFORCE.....	3
2	SUPPORTED ENVIRONMENTS	4
3	INSTALLING INGENIUS CRM INTEGRATION FOR SALESFORCE	5
4	REGISTERING INGENIUS CRM INTEGRATION FOR SALESFORCE	6
5	ASSOCIATING INGENIUS CRM INTEGRATION FOR SALESFORCE WITH YOUR PHONE	7
6	INSTALLING THE SALESFORCE CALL CENTER ADAPTOR.....	7
7	CREATING A CALL CENTER	7
8	ASSIGNING USERS TO A CALL CENTER	8

1 About InGenius CRM Integration for Salesforce

InGenius CRM Integration for Salesforce is a search-and-dial and incoming screen-pop application that integrates your phone communications directly into your Salesforce environment, to accelerate, simplify, and streamline your workflow.

InGenius CRM Integration for Salesforce is a PC application that seamlessly integrates telephony users' telephone operations with Salesforce, providing multiple features including click-to-dial from Salesforce and Salesforce contact record pop-up based on incoming call.

This guide is intended to provide the information required by IT personnel to deploy and support InGenius CRM Integration for Salesforce. The following topics are discussed:

- Supported Environments
- Installing the InGenius Call Center Adaptor
- Creating a Call Center
- Assigning Users to a Call Center

2 Supported Environments


InGenius CRM Integration for Salesforce provides desktop integration with telephony products and other systems in a network environment.

The support for each component that integrates with InGenius CRM Integration for Salesforce is summarized below.

Component	Description	Support Version
Platforms	The operating systems on which you can install InGenius CRM Integration for Salesforce. This includes Terminal Services support.	<ul style="list-style-type: none">Windows XP Profession 32 bitWindows XP Profession 64 bitWindows Vista Business 32 bitWindows Vista Business 64 bitWindows Server 2003 Terminal Services 32 bitWindows Server 2003 Terminal Services 64 bit
Salesforce	The versions and variations of Salesforce supported by InGenius CRM Integration for Salesforce	<ul style="list-style-type: none">Version 4.5 or higherProfessional, Enterprise, Unlimited editions
Browsers	The browsers supported with InGenius CRM Integration for Salesforce	<ul style="list-style-type: none">Internet Explorer 7 or higher

3 Installing InGenius CRM Integration for Salesforce

Use this procedure to install InGenius CRM Integration for Salesforce.

 **Note:** There are mass deployment and configuration options for InGenius CRM Integration for Salesforce. (Please see the InGenius CRM Integration for Salesforce Admin Guide.)

1. To initiate the install, double click the **.msi** file.
2. Follow the onscreen instructions in the installation program:
 - a. If not already installed, it will initiate the install of Microsoft .NET Framework 2.0. (Microsoft .NET Framework 2.0 is required to run the application)
 - b. On the License Agreement dialog, read the agreement, select “I Agree” and click “Next”.
 - c. Select a folder where it will be installed. By default, it will be installed to “C:\Program Files\InGenius\Connector\”

NOTE: The Salesforce Adaptor files necessary to enable click-to-dial comes as part of your install package and will be located in the folder where you want the application to be installed.

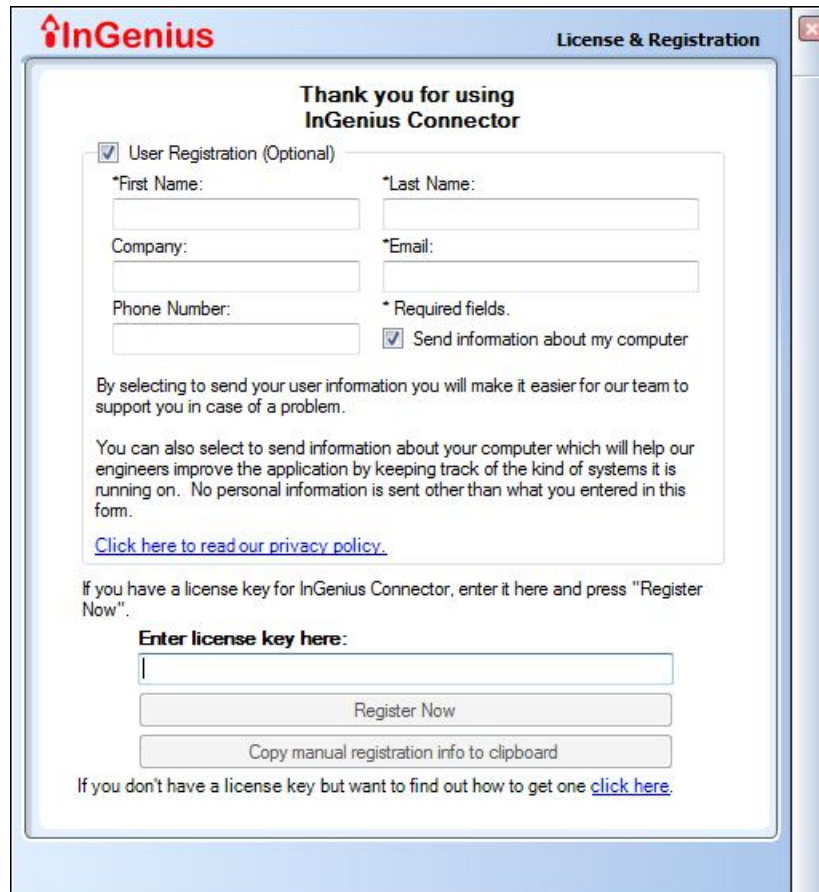
3. The install will then be done.

4 Registering InGenius CRM Integration for Salesforce


When you run the application for the first time, you will encounter a registration dialog requiring you to enter your license key.


1. Enter your license key.
2. Click “Register Now”

If you do not have a license key, contact us at sales@ingenius.com and we'll provide you with a trial key or a full license key.



The screenshot shows a dialog box titled "License & Registration" with the InGenius logo in the top left. The main heading is "Thank you for using InGenius Connector". Below this, there is a section for "User Registration (Optional)" which is checked. It contains several input fields: "*First Name:", "*Last Name:", "Company:", "*Email:", and "Phone Number:". There are also two checkboxes: "* Required fields." and "Send information about my computer" (which is checked). Below the form, there is explanatory text about user registration and a link to the privacy policy. At the bottom, there is a section for entering a license key, with a text input field, a "Register Now" button, and a "Copy manual registration info to clipboard" button. A final note at the bottom provides a link for users who don't have a license key.

 **Note:** Here you can also find out how to get a license key if you don't already have one.

 **Note:** Registering via this screen requires a connection to the Internet. If the PC is not connected, pressing the “Register Now” button will bring up a “Manual Registration” dialog with instructions on how to manually register the application.

5 Associating InGenius CRM Integration for Salesforce with Your Phone

For instruction on how to create phone profiles, please see your Connector User Guide.

6 Installing the Salesforce Call Center Adaptor

Any machine that uses Salesforce.com Call Center Edition must have a computer-telephony integration (CTI) adapter installed for the type of CTI system, in this case InGenius CRM Integration for Salesforce, that is in use. The CTI adapter acts as an intermediary between InGenius CRM Integration for Salesforce, Salesforce, and a Salesforce.com Call Center Edition user.

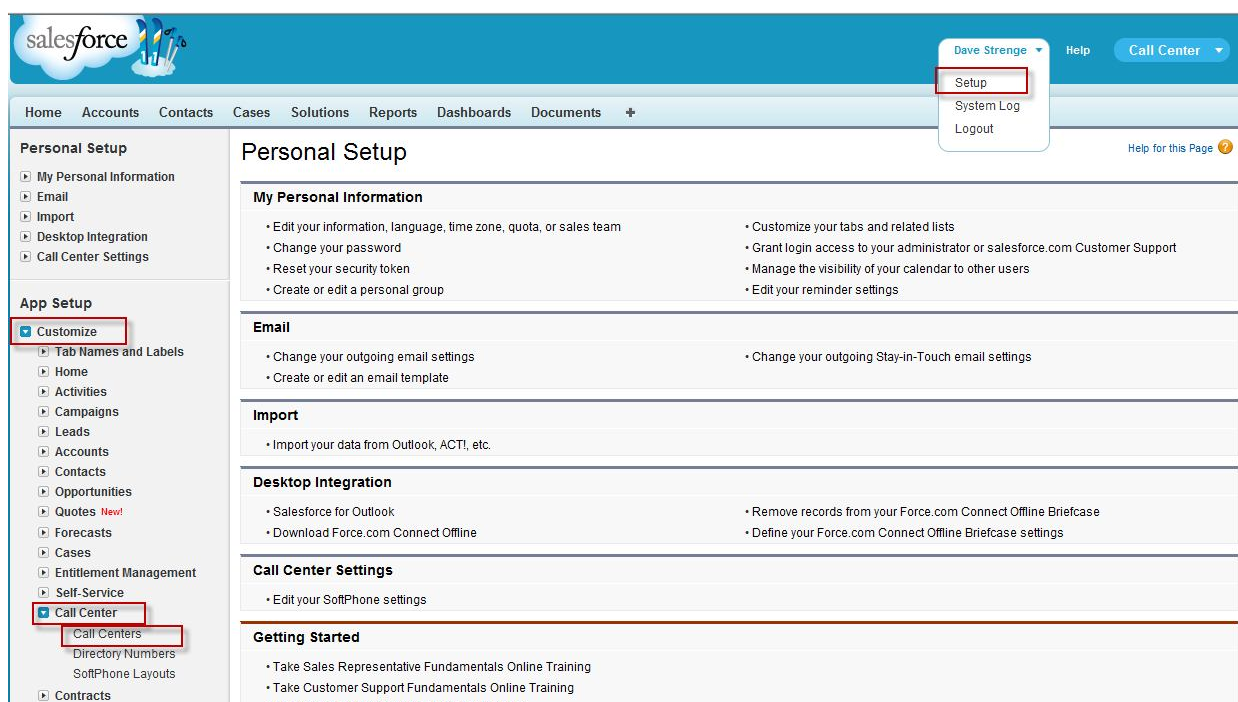
The SalesforceAdaptor.xml file comes as part of your install package and is located in the same location you downloaded the application. By default the location is set to:
Computer--> Local Disk (c:)-->Program Files --> InGenius -->Connector -->Plugins

7 Creating a Call Center

A call center corresponds to a single instance of a CTI system at your organization.

To create your call center for the InGenius CRM Integration for Salesforce:

1. In Salesforce, click **Setup | Customize | Call Center Edition | Call Centers**.



2. If the Introducing Call Center Edition splash page appears, click **Continue**.

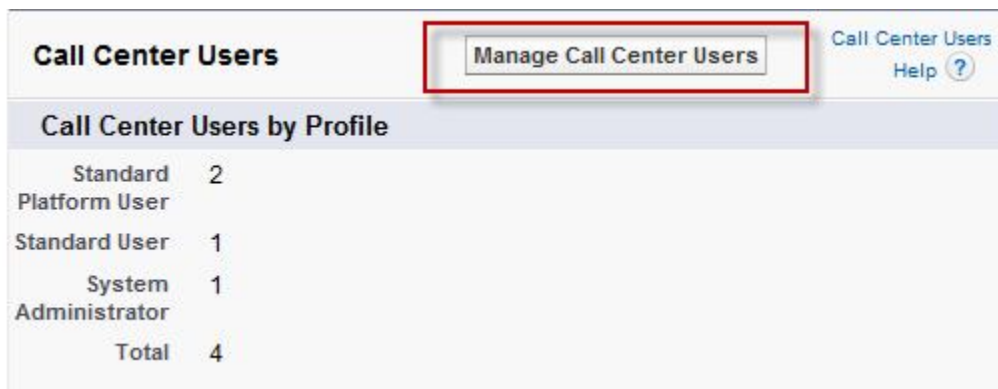
3. Click **Import**.
4. Next to the **Call Center Definition File** field, click **Browse** to navigate to the default call center definition file (SalesforceAdapter.xml that came with your install package).
5. Click **Import**.
6. Click **Edit** next to the name of the new call center to make any additional changes.

8 Assigning Users to a Call Center

Salesforce users must be assigned to a call center before they can use InGenius CRM Integration for Salesforce features.

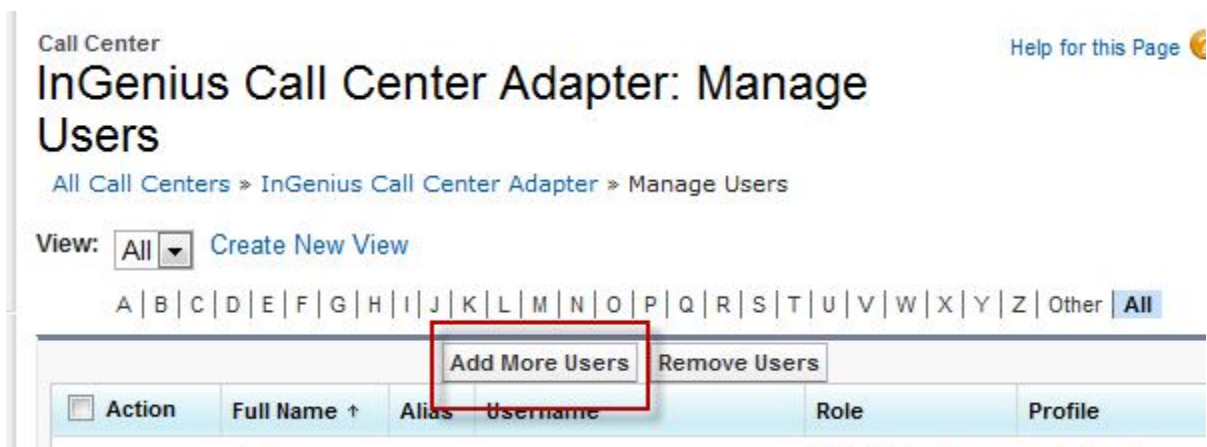
To assign users to a call center:

1. Click **Setup | Customize | Call Center Edition | Call Centers**.
2. Click the name of the call center to which you want to assign users.
3. In the Call Center Users related list, click **Manage Call Center Users**.



Call Center Users by Profile	
Standard Platform User	2
Standard User	1
System Administrator	1
Total	4

4. Click **Add More Users**.



Call Center Help for this Page

InGenius Call Center Adapter: Manage Users

All Call Centers » InGenius Call Center Adapter » Manage Users

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

Action	Full Name ↑	Alias	Username	Role	Profile

5. Specify search criteria to find the Salesforce users who should be assigned to the call center.

6. Click **Find**. All users who belong to a call center are excluded from search results because a user can only be assigned to one call center at a time.
7. Select the checkbox next to each user who should be assigned to the call center and click **Add to Call Center**.

NOTE: Once the initial users are set up, the administrator will be presented with a check box to create this functionality when they create a new user account within Salesforce.