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# InGenius CRM Integration for Salesforce

## User Guide

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User's Guide – InGenius CRM Integration for Salesforce  
September 2011

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## 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.com, providing multiple features including click-to-dial from Salesforce and Salesforce contact record pop-up based on incoming call.

The feature rich application provides call control within Salesforce and outside of Salesforce using the InGenius CRM Integration for Salesforce tool bar or tray icon.

### 1.1.1 Features

- Screen pop on incoming and outgoing calls based on received and placed calls that are matched to the corresponding record in CRM.
- Click-to-dial from within the Salesforce.com user interface
- Click-to-answer from within the Salesforce.com interface
- Make outgoing calls from within the Salesforce.com user interface
- Integrated call control: answer, Release, Conference, Transfer call from within the Salesforce.com user interface
- Selective match: If caller ID matches multiple records within Salesforce.com, the user can select the appropriate record when the caller has been identified verbally
- Call reporting: run detailed reports on call usage by employees and track down which customers are calling in most frequently
- Call logging: all information is auto-logged with the associated contact

## 1.2 Operating System, Hardware and Software Requirements

### 1.2.1 Hardware Requirements

Minimum requirements

- Windows XP with Service Pack 2
- Pentium 3 (or equivalent)
- 1 GB RAM
- 40 MB free disk space for application install and data
- Microsoft .Net Framework 2.0

Recommended system

- Pentium 4 (or equivalent)
- Dual-core CPU
- 2 GB RAM
- 40 MB free disk space for application install and data
- Microsoft .Net Framework 2.0
- Windows Live Messenger version 8.5

### **1.2.2 Supported versions of Salesforce**

InGenius CRM Integration for Salesforce supports:


- Salesforce Professional, Enterprise and Unlimited
- Salesforce versions after summer 2010

### **1.2.3 Recommended Brower**

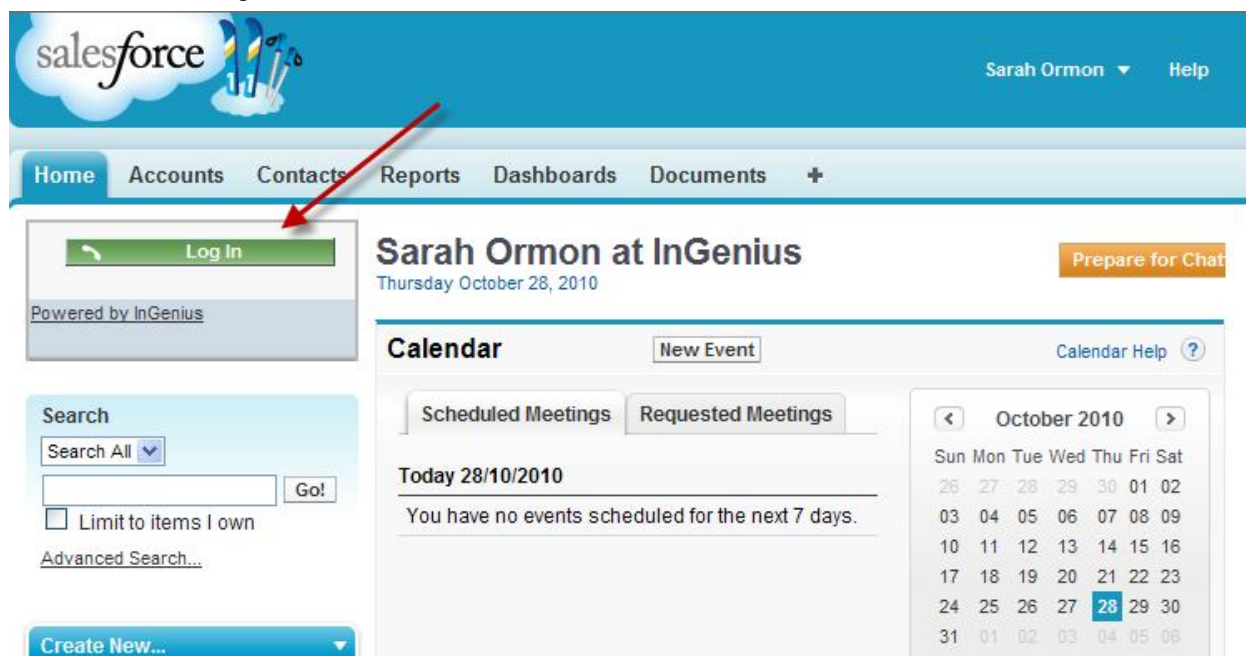
- InGenius CRM Integration for Salesforce is supported on Internet Explorer 7 or higher.

## 2 Using InGenius CRM Integration for Salesforce from within the Salesforce.com interface

### 2.1 Connecting Salesforce with InGenius CRM Integration for Salesforce

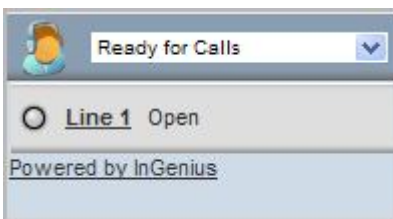
 **Note:** InGenius CRM Integration for Salesforce needs to be running for you to be able to use the telephony functions within Salesforce.com. It is advised to start InGenius CRM Integration for Salesforce before you log in to your Salesforce.com account.

To start, log into your Salesforce.com account using the Internet Explorer browser. In the upper left-hand corner there will be a large green button labeled **Log In**. Click on **Log In** to connect Salesforce with InGenius CRM Integration for Salesforce.




The screenshot shows the Salesforce.com user interface. At the top, the Salesforce logo is on the left, and the user name 'Sarah Ormon' and 'Help' are on the right. Below the logo is a navigation bar with tabs for 'Home', 'Accounts', 'Contacts', 'Reports', 'Dashboards', and 'Documents'. A red arrow points to a 'Log In' button in a sidebar on the left. The main content area displays the user's profile 'Sarah Ormon at InGenius' with the date 'Thursday October 28, 2010' and a 'Prepare for Chat' button. Below the profile is a 'Calendar' section with tabs for 'Scheduled Meetings' and 'Requested Meetings'. The calendar shows 'Today 28/10/2010' and a message: 'You have no events scheduled for the next 7 days.' To the right of the calendar is a monthly calendar for 'October 2010' with the 28th highlighted. On the left side of the main content area, there is a search box and a 'Create New...' button.

Once you have logged in you will see that your line is open ready for you to use.



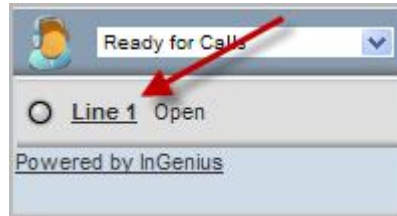
The screenshot shows a small window titled 'Ready for Calls'. It features a dropdown menu with a blue arrow pointing down. Below the dropdown, there is a radio button next to the text 'Line 1 Open'. At the bottom of the window, it says 'Powered by InGenius'.

 **Note:** You will have to log into your softphone every time you sign in to your Salesforce account or if you change the phone profile you are using.

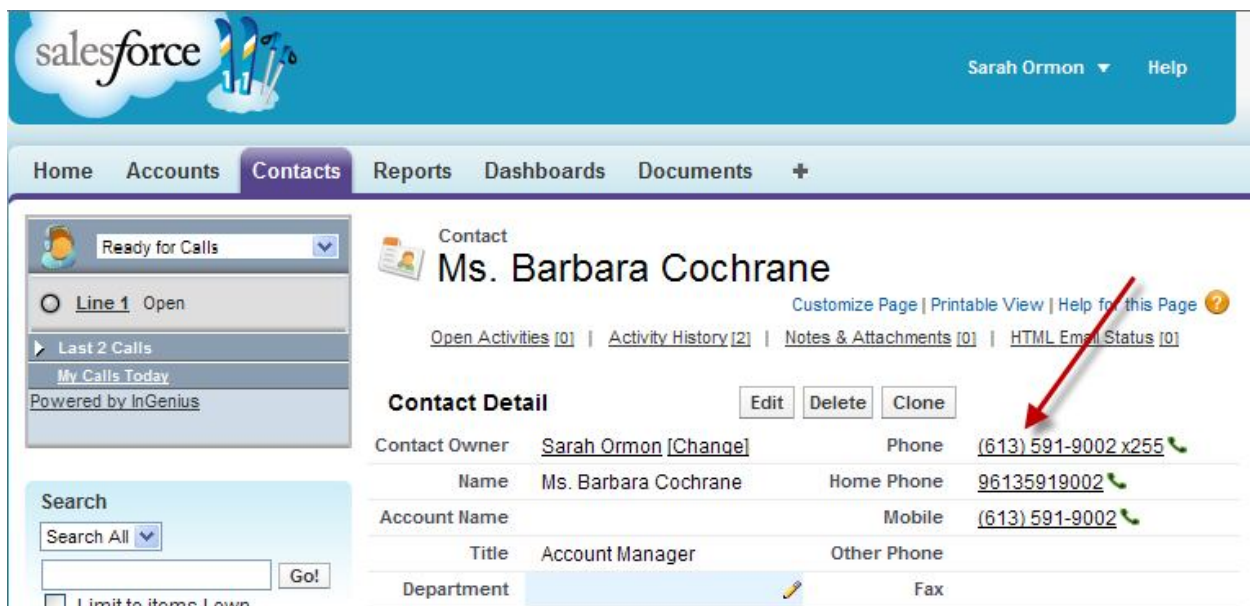
## 2.2 Making a Call from Salesforce

There are two options for placing a call within Salesforce:

1. Dialing the phone number using the telephony dial pad. To do this simply click on **Line 1** and then dial the number.



2. Click-to-dial by clicking on any phone number within Salesforce.



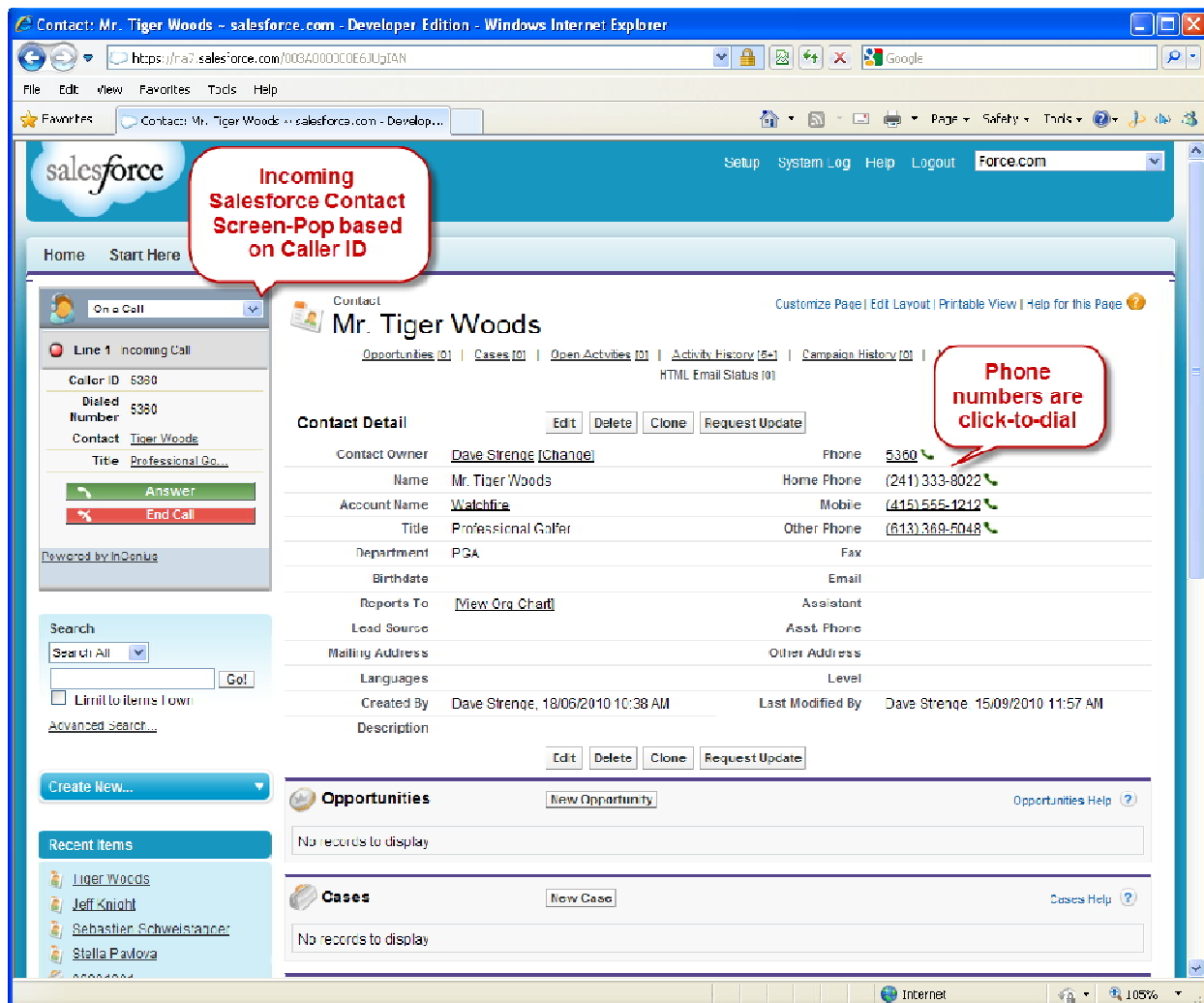
**Note:** If you are using a BroadSoft profile you will need to manually dial extensions on your phone.

### 2.3 Receiving a Call in Salesforce

On an incoming call, InGenius CRM Integration for Salesforce will match the caller ID with the appropriate contact in Salesforce and pop the contact record.

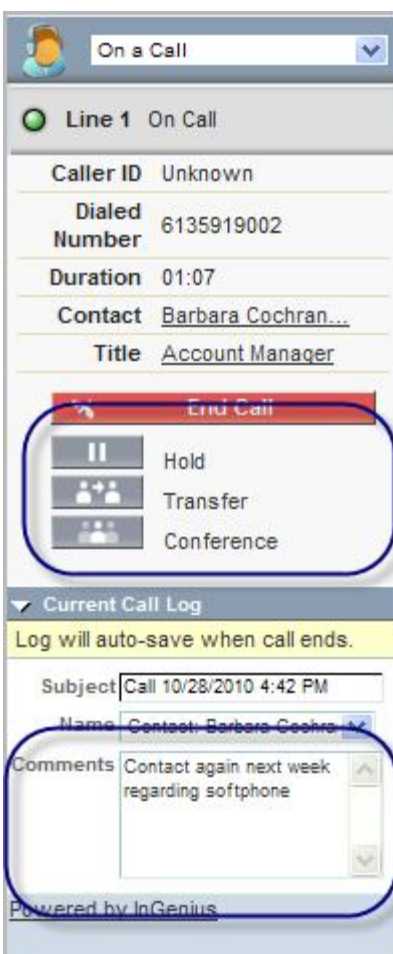
 **Note:** For the incoming caller ID to pop a contact page, you must be logged into Salesforce.

To answer the call simply click **Answer** on the left-hand telephone window.



## 2.4 Actions While on a Call within Salesforce.com




There are several actions that you can perform while on a call.




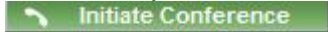
### 2.4.1 Hold


To put a call on hold simply click on the **Hold** icon . To take the call off hold, click **Retrieve Call from Hold** .

### 2.4.2 Transfer

To transfer a call click on the **Transfer** icon . Type in the number or extension where you would like to transfer the call and select **Initiate Transfer**  or **One-Step transfer** .

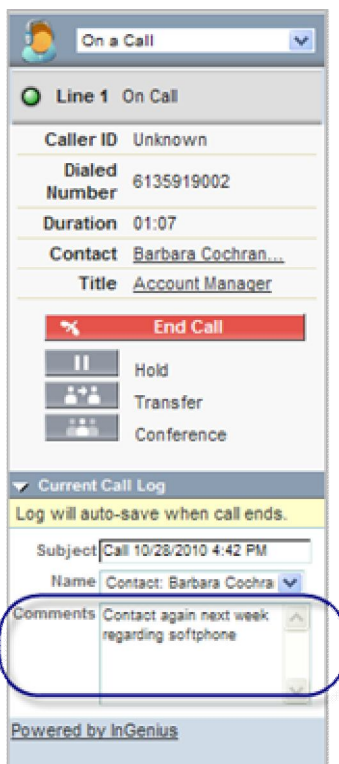
### 2.4.3 Conference

To conference a call, click on the **Conference** icon . Type in the number or extension of the person you would like to join the conference and select **Initiate Conference**  or **One-Step**

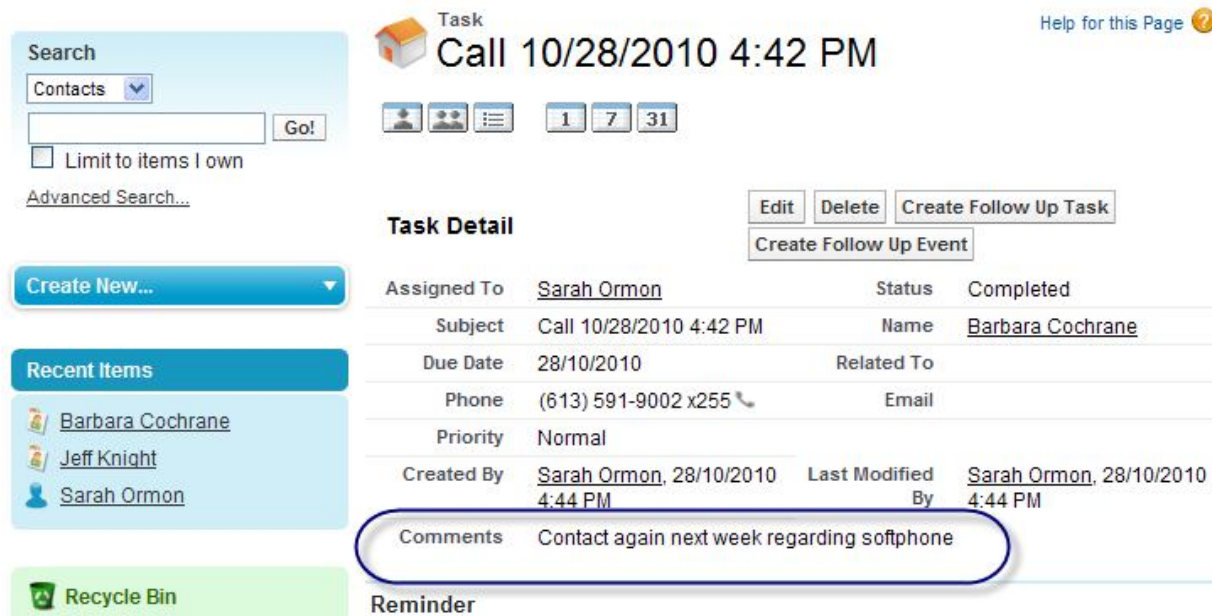
**Conference** .

### 2.4.4 Adding Comments and Logging Calls


To add comments to a call, simply type the comments in the comment box.



When the call has ended the comments will be saved in the call log.



Calls are automatically logged when you use InGenius CRM Integration for Salesforce to make and receive calls within the Salesforce interface. You can find the call logs under the report folder, **Call Center Reports** within Salesforce.

 **Note:** Salesforce will automatically log all calls, but it will only keep the phone number associated with that call if the number was already a part of a contact record.