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Screen Pop and Outdial SalesForce.com

Strata Call Manager (SCM) can screen pop the SalesForce.com browser window by passing a search URL with the Caller ID Number embedded. Actually, any piece of searchable information in SalesForce.com can be used if the information is attached to a call and can be exposed by a SCM action variable. This example demonstrates the Caller ID scenario.

Important!

This document is provided to show an example of how this application can integrate with this third-party program. This is NOT a guarantee that this type of integration will work in all different PC environments or with all versions of this third-party program. It is the responsibility of the installer and/or customer to validate their own unique installations.

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Finding the Proper Search URL

You must be logged in to Salesforce.com before you can pop records.

1. Login to Sales Force.com.
2. Click the Advanced Search link (shown right).



3. Enter a phone number that is in the database.
"Find words as an exact phrase" should not be checked.
4. Select the desired search options under "Advanced Controls".
5. Click the Search button.

Advanced Search

Search

Advanced Options

Use enhanced search capabilities [?](#)

Limit to items I own

Exact phrase

Scope

[Select All](#) | [Deselect All](#)

<input checked="" type="checkbox"/> Accounts	<input checked="" type="checkbox"/> Contacts	<input type="checkbox"/> Leads
<input type="checkbox"/> Opportunities	<input type="checkbox"/> Cases	<input type="checkbox"/> Case Comments
<input type="checkbox"/> Campaigns	<input type="checkbox"/> Contracts	<input type="checkbox"/> Assets
<input type="checkbox"/> Tasks	<input type="checkbox"/> Events	<input type="checkbox"/> Notes
<input type="checkbox"/> Attachments	<input type="checkbox"/> Ideas	<input type="checkbox"/> Reports
<input type="checkbox"/> Users		

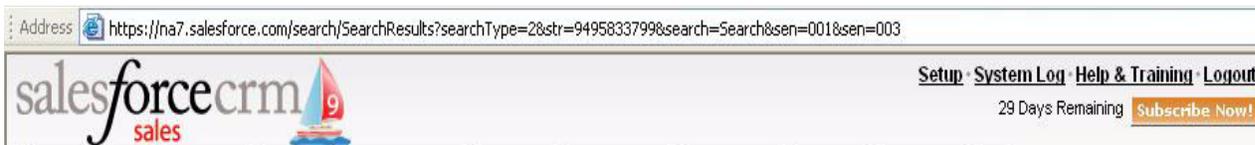
6. The following screen displays. Note that the Account and Contact record which match the phone number are displayed.

The screenshot shows the Salesforce Advanced Search Results page. The search criteria are: Search: 9495833799, Scope: Accounts, Contacts. The results table displays one contact record:

Action	Name	Account Name	Phone	Email	Contact Owner Alias
Edit	Mr. Henry Smith	salesforce.com	(949) 583-3799		nchac

Below the table, it states: "There are no matching Accounts".

7. Take special note of the URL that is in the address bar, shown below:



Below is the URL from the address bar in this example:

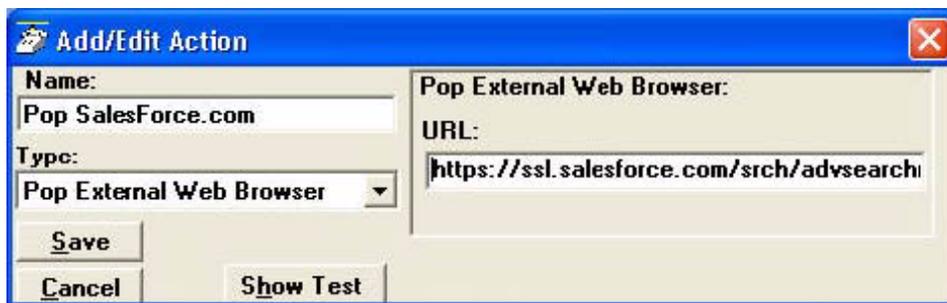
`https://na7.salesforce.com/search/SearchResults?searchType=2&str=9495833799&search=Search&sen=001&sen=003`

Notice that the string contains our search parameter, the phone number 9495833799.

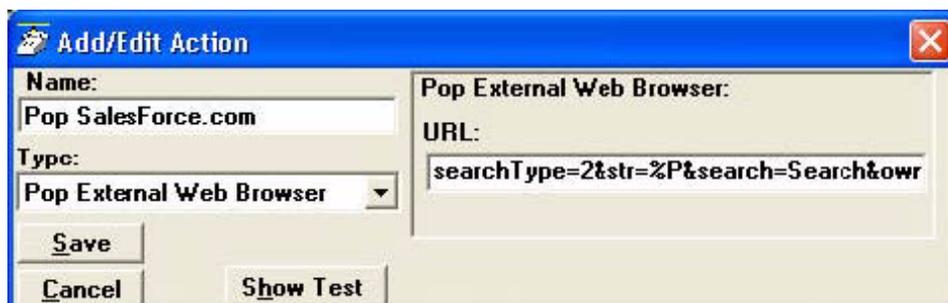
Copy the URL from the address bar.

SCM Configuration

1. Create a User Defined Action in SCM of type "Pop External Web Browser"
2. Name the action "Pop Salesforce.com:"
3. Paste the URL into the URL field as shown below:



4. Scroll over to the place in the URL field where the phone number is located and replace the phone number with %P as shown below. %P is the SCM action variable for calling number.



5. Save this action.

6. Create a Personal Call Handler rule so that when a call rings with a caller ID number attached; the "Pop Salesforce.com" action will be invoked.

7. Click OK. Configuration complete!

Out Dialing Numbers from Salesforce.com

Dialing is accomplished using the SCM Hotkey Dial feature. Simply highlight the number you wish to dial in the browser window and press the configured hotkey. See the SCM help file for information on configuring Hotkey dialing.

Troubleshooting

Make sure you have done the following:

- Tested the search as described in this document and copied the entire URL.
- Substituted the appropriate action variable for the search string you want to use.
- Logged in to Salesforce.com
- Used the Check Action test feature in the Personal Call Handler to check the action.

The test numbers used are valid records in Salesforce.com.

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