

# Strata<sup>®</sup> Call Manager Application Notes

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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 thirdparty 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).

🗿 Advanced Search ~ Salesford	e - Professional Edition -
File Edit View Favorites Too	ols Help
🚱 Back 🔹 🕥 - 💌 💈	Search 👷 F
Address Address https://na7.salesforce.co	m/search/AdvancedSearch?sear
sales Home Leads Accounts C	n <u>)</u> ontacts Opportunities
Search	Advanced Search
Go!	Search
Limit to items I own	9495833368
Advanced Search	Advanced Options
Create New 🔻	🗸 Use enhanced search
	🔲 Limit to items I own
Recent Items	🔲 Exact phrase

- 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.

Search	Protocology and	
9495833799	Search	
Advanced Options		
✔Use enhanced search cap	abilities 📵	
🗌 Limit to items I own		
Exact phrase		
Scope		
Select All   Deselect All		
Accounts	Contacts	Leads
Dpportunities	Cases	Case Comments
🔲 Campaigns	Contracts	Assets
Tasks	Events	🗌 Notes
- Attachmente	🗌 Ideas	Reports
Allachments		

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

🗿 Advanced Search Results ~ Se	alesforce - Professional Edition - Mi	crosoft Internet Explorer				8
File Edit View Favorites Too	ls Help					
🚱 Back 🔹 🕑 🐇 📓	🏠 🔎 Search 🤺 Favorites 🎸	) 🔗 🎍 🤱 · 🗷 ·	J 🗱 🦓 🕟			
Address 🙆 https://na7.salesforce.com	m/search/SearchResults?searchType=2&str=	9495833799&search=Search&sen=001&se	n=003			👻 🛃 Go 🕴 Links
salesforcecrn	n		<u>Setup · System Log · Help &amp; Train</u> 29 Days Remaining <mark>Sub</mark>	ing • <u>Logout</u> scribe Now!	force.com apps Sales	<b>v</b>
Home Leads Accounts C	ontacts Opportunities Reports	Dashboards Documents Product	s Forecasts 🔸			
Search Search All V Col	Advanced Search Results Search 9495833799	Search	Limit to items I own			Help for this Page 🗿
Advanced Search	Scope: Accounts, Contacts   &	dvanced Search				
Create New 🔻	Contacts [1]					
	Contacts [1]					Customize 🔻
Recent Items	Action <u>Name</u>	Account Name	Phone	<u>Email</u>	Contact Owner Alias	
i Henry Smith salesforce.com	Edit <u>Mr. Henry Smith</u>	salesforce.com	(949) 583-3799		<u>nchac</u>	
Salesforce for <u>Google</u> <u>AdWords Logo</u> Salesforce Marketing Logo <u>Recycle Bin</u>	There are no matching: Accounts					

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

Address 🕘 https://na7.salesforce.com/search/SearchResults?searchType=28str=9	4958337998search=Search8sen=0018sen=003
alectorce arm	Setup · System Log · Help & Training · Logout
Sales Olecci III	29 Days Remaining Subscribe Now!

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:

🕭 Add/Edit A	action	×
Name: Pop SalesForce.com Type: Pop External Web Browser 💌		Pop External Web Browser: URL: https://ssl.salesforce.com/srch/advsearch
<u>Save</u>	S <u>h</u> ow Test	

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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