



## **Quick Start Configuration Guide Salesforce.com Integration**



## Introduction

The basic integration of WorldSmart and Salesforce.com offers the following features:

- WorldSmart tabs in Salesforce dashboard.
- Click to dial from the salesforce dashboard
- Log a call screen in case of incoming calls.

This document covers the configuration of basic integration, along with some simple instructions for using the features offered by the basic integration.

## Configuring WorldSmart for Salesforce

The administrator of the organization which is using salesforce needs to add two new fields. This can be done in the following way:

Log in to the Salesforce dashboard using your salesforce account name and password.

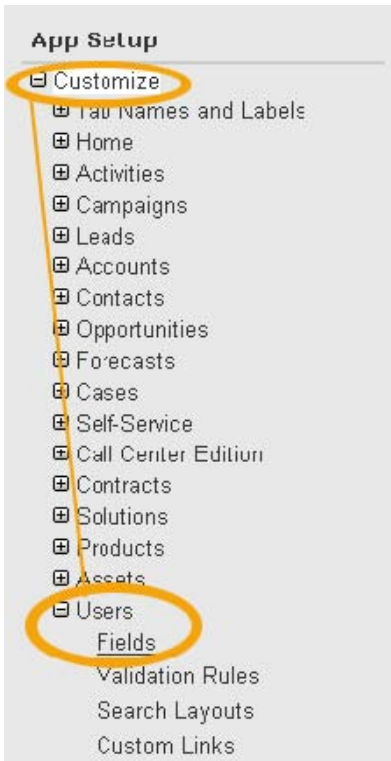


This displays the main page:



Click Setup. This displays the screen shown below:





Click **Customize > Users > Fields**.




In the page displayed, click **New**.

**Step 1. Choose the Field Type** Step 1

Next Cancel

Specify the type of information that the custom field will contain.


Data Type	
<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input type="radio"/> Hierarchical Relationship	Allows users to click a  button and select another user from a pop-up list. You specify whether the "Manage Users" permission is required to edit the field.
<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
<input type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar.
<input type="radio"/> Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the popup, that date and the current time are entered into the Date/Time field.
<input type="radio"/> Email	Allows users to enter an email address. The entered address is validated to ensure that it is in the proper format. Users can then click on the field to automatically launch their email program and send an email to that address.
<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, 10 and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input checked="" type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 32000 characters on separate lines.
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Select **Text** and click **Next** as shown above. This displays the screen shown below:


**Step 2. Enter the details** Step 2 of 3

Previous Next Cancel

Field Label  

Please enter the maximum length for a text field below.

Length

Field Name  

Description

Required  Always require a value in this field in order to save a record

Unique  Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive)  
 Treat "ABC" and "abc" as different values (case sensitive)

External ID  Set this field as the unique record identifier from an external system

Restricted Field  Only allow users with Manage Users permission to edit this field

Default Value

Use formula syntax: e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

Previous Next Cancel



Enter the following details:


- Enter **wsuser** against **Field Label**
- Specify Length as **80**.
- Click **Next**. In the next page, click **Save & New**.

**Note:**

The next step is actually the same as the one just described. However, it is necessary that the next step too is completed, as the purpose here is to create two custom fields in your salesforce dashboard: wsuser and wspan.

This displays the screen shown below:

Specify the type of information that the custom field will contain.

Data Type	
<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input type="radio"/> Hierarchical Relationship	Allows users to click a  button and select another user from a pop-up list. You specify whether the "Manage Users" permission is required to edit the field.
<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
<input type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar.
<input type="radio"/> Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the popup, that date and the current time are entered into the Date/Time field.
<input type="radio"/> Email	Allows users to enter an email address. The entered address is validated to ensure that it is in the proper format. Users can then click on the field to automatically launch their email program and send an email to that address.
<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, 10 and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input checked="" type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 32000 characters on separate lines.
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

In the page that is displayed:

Field Label  ⓘ

Please enter the maximum length for a text field below.

Length

Field Name  ⓘ

Description

**Required**  Always require a value in this field in order to save a record

**Unique**  Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive)

Treat "ABC" and "abc" as different values (case sensitive)

**External ID**  Set this field as the unique record identifier from an external system

**Restricted Field**  Only allow users with Manage Users permission to edit this field

**Default Value** [Show Formula Editor](#)

Use [formula syntax](#): e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

In the screen displayed, enter the following details:

- Enter **wspass** against **Field Label**
- Specify Length as **80**.

Click **Next**. In the next page, click **Save**.

After creating the new user custom fields, go to the personal information page.

In the Personal Information page, click **Edit**.

- In the wspass field, enter your WorldSmart password.
- In the wsuser field, enter your user name.
- Click **Save**.

## Creating WorldSmart Tabs in Salesforce

To perform this integration, at various places you need to enter URLs in specific fields in your Salesforce dashboard.

### Getting Started

Click **Setup** from the main Salesforce page.

From the page displayed:

Click **Build** -> **Custom Tabs** and click the **New** button against Web Tabs.



The screenshot displays the Salesforce Setup interface. On the left is a navigation sidebar with two main sections: **Personal Setup** and **App Setup**. Under **App Setup**, the **Build** section is expanded, and **Custom Tabs** is highlighted with a red circle. A red arrow points from this circle to the **Web Tabs** section in the main content area. The main content area is titled **All Custom Tabs** and contains the following text: "You can create new custom tabs to extend Salesforce functionality or to build new Custom Object Tabs look and behave like the standard tabs provided with Salesforce window." Below this text are two panels: **Custom Object Tabs** and **Web Tabs**. Each panel has a **New** button and a **What Is This?** link. The **Custom Object Tabs** panel shows "No Custom Object Tabs have been defined". The **Web Tabs** panel shows "No Web Tabs have been defined".

Select **Full page width** and click **Next**.

Step 1. Choose Tab Layout

Step 1 of 5

Choose the page layout of the web tab you wish to create.

Full page width

Full page style gives you maximum screen real estate for the content you embed in the Salesforce window



2 columns with Salesforce sidebar

2 column style provides useful Salesforce functions, like Search and Recent Items, on the same page as your emedded content.



Next

Cancel

This displays the screen shown below:

New Web Tab

Step 2. Define Content and Display Properties

Fill in information about the web tab.

**Tab Content Definition**  
Choose how the tab content will be defined.

Tab Type:

**Display Properties**

Tab Label:  1

Tab Style:  2

Content Frame Height (pixels):  3

**Splash Page**  
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link:

**Description**

Description:

Previous Next Cancel

Enter the following details:

- Select **URL** from the Tab type drop down list.
- Enter **Voicemail** in the Tab Label field.
- Select the Phone style or any other style from the options displayed.
- Click **Next**.

The following page is displayed:

**Step 3. Enter the URL Details** Step 3 of 5

Enter the web page address in the Link URL field. You can enter a simple URL just as it appears in the browser address bar, or you can use one or more merge fields to insert organization-specific data from Salesforce into URL parameters.

Examples: Simple `http://www.google.com`  
With Merge Field `http://www.google.com/search?q={!Org_Name}`

**Available Merge Fields**

Select Field Type	Select Field	Copy Merge Field Value
User Fields	wsuser	{!User_wsuser}

Copy and paste the merge field value into your template below.

**Button or Link URL** Preview Web Tab ! = Required Information

`https://central.wspbx.com/SforcePages/LoginServletVoice.jsp?UserName={!User_ws_username}&Password={!User_ws_password}`

Encoding: Unicode (UTF-8)

Previous Next Cancel

- Select **User Fields** from the select field type drop-down list.
- Select **wsuser** from the Select Field drop-down list.
- In the URL field, enter the following URL:

`https://central.wspbx.com/SforcePages/LoginServletVoice.jsp?UserName={!User.wsuser__c}&Password={!User.wspass__c}`

- Click **Next** and **Save**

**Step 4. Add to Custom Apps** Step 4 of 4

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	Include Tab
Sales	<input checked="" type="checkbox"/>
Service & Support	<input checked="" type="checkbox"/>

Append tab to users' existing personal customizations

Previous Save Cancel

Repeat the steps explained above to create the **Routing Plans** and **WS Settings** tabs.

#### **WS-Settings tab link**

For WS-Settings tab, enter the following URL:

[https://central.wspbx.com/SforcePages/LoginServletSetting.jsp?UserName={!User.wsuser\\_\\_c}&Password={!User.wspass\\_\\_c}](https://central.wspbx.com/SforcePages/LoginServletSetting.jsp?UserName={!User.wsuser__c}&Password={!User.wspass__c})

#### **Routing Plans tab link**

Enter the following URL in this field:

[https://central.wspbx.com/SforcePages/LoginServletRouting.jsp?UserName={!User.wsuser\\_\\_c}&Password={!User.wspass\\_\\_c}](https://central.wspbx.com/SforcePages/LoginServletRouting.jsp?UserName={!User.wsuser__c}&Password={!User.wspass__c})

Note: These user fields and web tabs will automatically get displayed to all the users in your account as long as they have been created by the administrator. A regular user only needs to add their WorldSmart username and password to their personal profile.

### **Click to Dial (CTD) from Salesforce**

Click to Dial is a feature with which you can make calls with a single click from your Salesforce Dashboard. You can configure to make calls to three phone numbers (WorldSmart extension, a home phone or a mobile phone) for each of your contacts in salesforce. You can also choose from where your call should be made. WorldSmart provides four options:

- WorldSmart SoftPhone
- IP Phone 1
- IP Phone 2
- User Phone Number

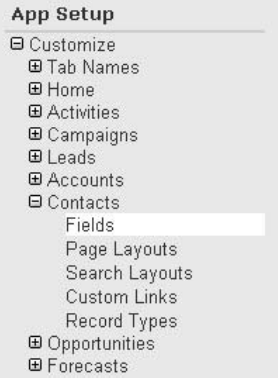
All you need to do is to activate by making some changes to your Salesforce setup. To do this, follow the instructions given below:

- Log into your Salesforce account
- On the home page, click the **Setup** link towards the top right of the page



Under the AppSetup link **Customize-->Contacts** and click the **Fields** link.





This displays the Contact Fields page. Click the **New** button located next to the Contact Custom Fields & Relationships tab on the lower side of the page:

Contact Custom Fields & Relationships		
	<b>New</b>	Field Dependencies
Action	Field Label	Data Type
<a href="#">Edit</a>   <a href="#">Del</a>	Call with WorldSmart	Formula (Text)
<a href="#">Edit</a>   <a href="#">Del</a>	Languages	Text(100)
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Replace</a>	Level	Picklist

In the Contact New Custom Field page: Step 1 page, click the radio button against **Picklist** and click **Next** as shown below:



- In the "Contact New Custom Field: Step 2" page,
- Enter "Call Contact with" in the Field Name,
  - Enter "WorldSmart Softphone, WorldSmart IP Phone 1, WorldSmart IP Phone 2 and User Phone No." in the text field below the Field Label as shown below:



Step 2. Enter the details Step 1 of 2

Field Label

Below is a list of picklist values. Click Edit to change the name of the value or make it the default value.

Picklist values			
<input type="button" value="New"/> <input type="button" value="Reorder"/> <input type="button" value="Replace"/> <input type="button" value="Printable View"/>			
Action	Values	Default	Modified By
<input type="button" value="Edit"/>   <input type="button" value="Del"/>	WorldSmart Softphone	<input checked="" type="checkbox"/>	Raju.TL.N, 31/05/2006 09:51
<input type="button" value="Edit"/>   <input type="button" value="Del"/>	WorldSmart IP Phone 1	<input type="checkbox"/>	Raju.TL.N, 31/05/2006 08:51
<input type="button" value="Edit"/>   <input type="button" value="Del"/>	WorldSmart IP Phone 2	<input type="checkbox"/>	Raju.TL.N, 31/05/2006 08:45
<input type="button" value="Edit"/>   <input type="button" value="Del"/>	UserPhone No.	<input type="checkbox"/>	Raju.TL.N, 12/12/2006 12:28

Field Name

Description

--Check the box against **Use first value as default value** and click **Next**. In the Contact New Custom Field: Step 3 page, Click **Next** as shown below:

Label Call Contact with  
 Data Type Picklist  
 Field Name Call\_Contact\_with  
 Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible <input checked="" type="checkbox"/>	Read-Only <input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>

In the Contact New Custom Field: Step 4 page, click **Save** as shown below:

Step 4. Add to Page Layouts

Label: Call Contact with  
Data Type: Picklist  
Field Name: Call\_Contact\_with  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Contact (Marketing) Layout
<input checked="" type="checkbox"/>	Contact (Sales) Layout
<input checked="" type="checkbox"/>	Contact (Support) Layout
<input checked="" type="checkbox"/>	Contact Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

This will take you to the contacts page. Scroll down and click **New** located next to the Contact Custom Fields & Relationships tab on the lower side of the page:

In the Contact New Custom Field: Step 1 page, select the radio button against **Formula** and click **Next**.

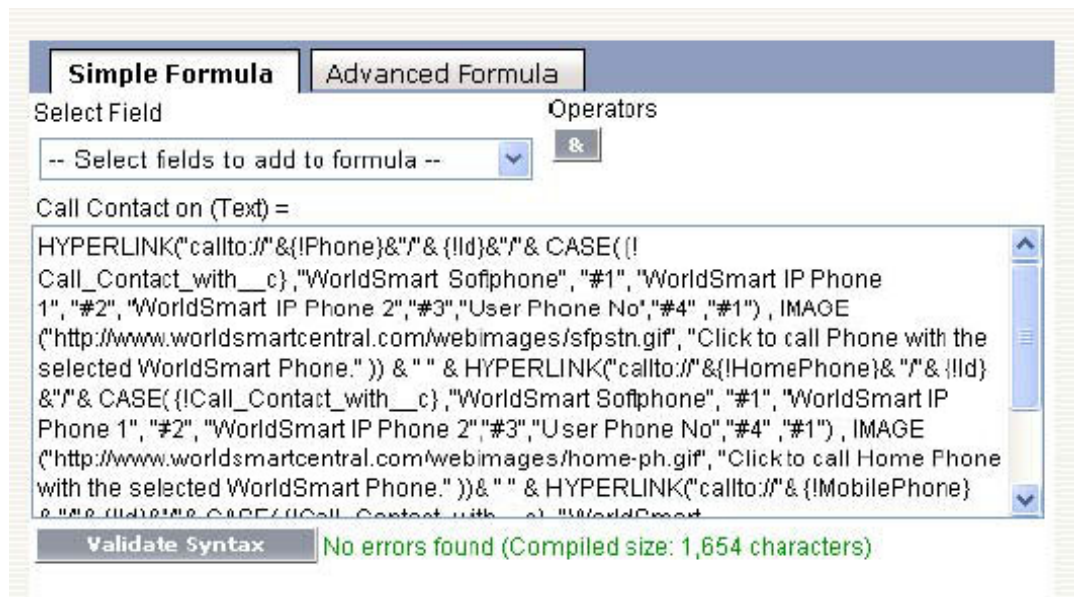
In the Contact New Custom Field: Step 2 page, enter **Select Number to Dial** in Field name, select the radio button against **Text** and click **Next**.

In the Contact New Custom Field: Step 3 page, Select Advanced Formula Tab and enter the following **URL**.

```
HYPERLINK("callto://"&Phone&"/"& Id&"/"& CASE( Call_Contact_with__c , "WorldSmart Softphone", "#1", "WorldSmart IP Phone 1", "#2", "WorldSmart IP Phone2", "#3", "User Phone No.", "#4", "#1" ) , IMAGE("https://central.wspbx.com/webimages/sfpstn.gif", "Click to call Phone with the selected WorldSmart Phone.") , "_self") & " " & HYPERLINK("callto://"&HomePhone&
```



```
"/"& Id&"/"& CASE( Call_Contact_with__c , "WorldSmart Softphone", "#1", "WorldSmart IP Phone 1", "#2", "WorldSmart IP Phone 2", "#3", "User Phone No.", "#4", "#1" ), IMAGE("https://central.wspbx.com/webimages/home-ph.gif", "Click to call Home Phone with the selected WorldSmart Phone." ), "_self")& " " & HYPERLINK("callto:/"& MobilePhone & "/"& Id&"/"& CASE( Call_Contact_with__c , "WorldSmart Softphone", "#1", "WorldSmart IP Phone 1", "#2", "WorldSmart IP Phone 2", "#3", "User Phone No.", "#4", "#1" ), IMAGE("https://central.wspbx.com/webimages/sfmobile.gif", "Click to call Mobile Phone with the selected WorldSmart Phone." ), "_self")
```



Click **Validate Syntax**, and then click **Next**. Click **Next** and **Save** in the next two steps.

For the contacts that already exist, the **Call Contact With** field is blank. Clicking on any of the phones will by default call from the WorldSmart softphone. To change the default phone to call from:

- Click the **Contacts** tab.
- Select the user. This will take you to the Contact Details page.
- Click the **Edit** tab and select the desired phone from which the call should go.

For new contacts, WorldSmart Softphone is set as the default phone to call from. Should you wish to change it, select the desired phone from the drop down list in the new contacts page and click **Save**. Your single click dialing setup for Salesforce is now complete. Go to the Contacts tab, and view details of any of your contacts. You will see the **Call Contact with** link as shown below:



**Contact**  
Vijay

[Customize Page](#) | [Help for this Page](#) 

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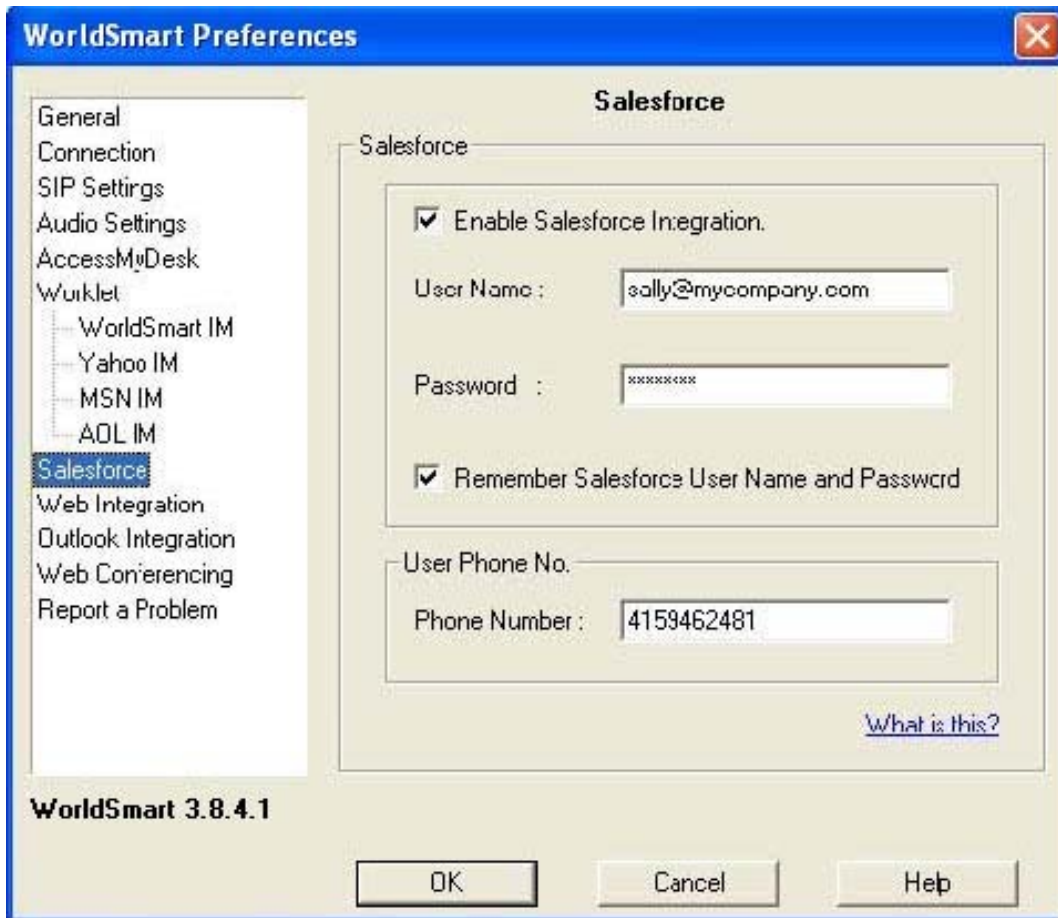
**Contact Detail** [Edit](#) [Delete](#) [Clone](#) [Printable View](#) [Request Update](#)

<b>Contact Owner</b>	Raju T L N [Change]	<b>Phone</b>	011919441226204
<b>Name</b>	Vijay	<b>Home Phone</b>	011919885522946
<b>Account</b>	sForce	<b>Mobile</b>	011919885522946
<b>Title</b>	WorldSmart	<b>Other Phone</b>	
<b>Department</b>	Sales	<b>Fax</b>	
<b>Birthdate</b>	09/11/1975	<b>Email</b>	
<b>Reports To</b>	<a href="#">Nilesh L N [View Org Chart]</a>	<b>Assistant</b>	
<b>Lead Source</b>	Web	<b>Asst. Phone</b>	
<b>Call Contact on</b>			
<b>Call Contact with</b>	User Phone No.		
<b>Mailing Address</b>	The Landmark @ One Market San Francisco, CA 94087 US	<b>Other Address</b>	
<b>Languages</b>		<b>Level</b>	
<b>Created By</b>	Raju T L N, 07/08/2006 09:57	<b>Last Modified By</b>	Raju T L N, 12/12/2006 12:36
<b>Description</b>			

[Edit](#) [Delete](#) [Clone](#) [Printable View](#) [Request Update](#)

Clicking on the image will automatically call the number associated with this contact.  
To call from User Phone number using the Click to Dial option in Salesforce, you need to specify the number in the WorldSmart Messenger Salesforce Preferences.



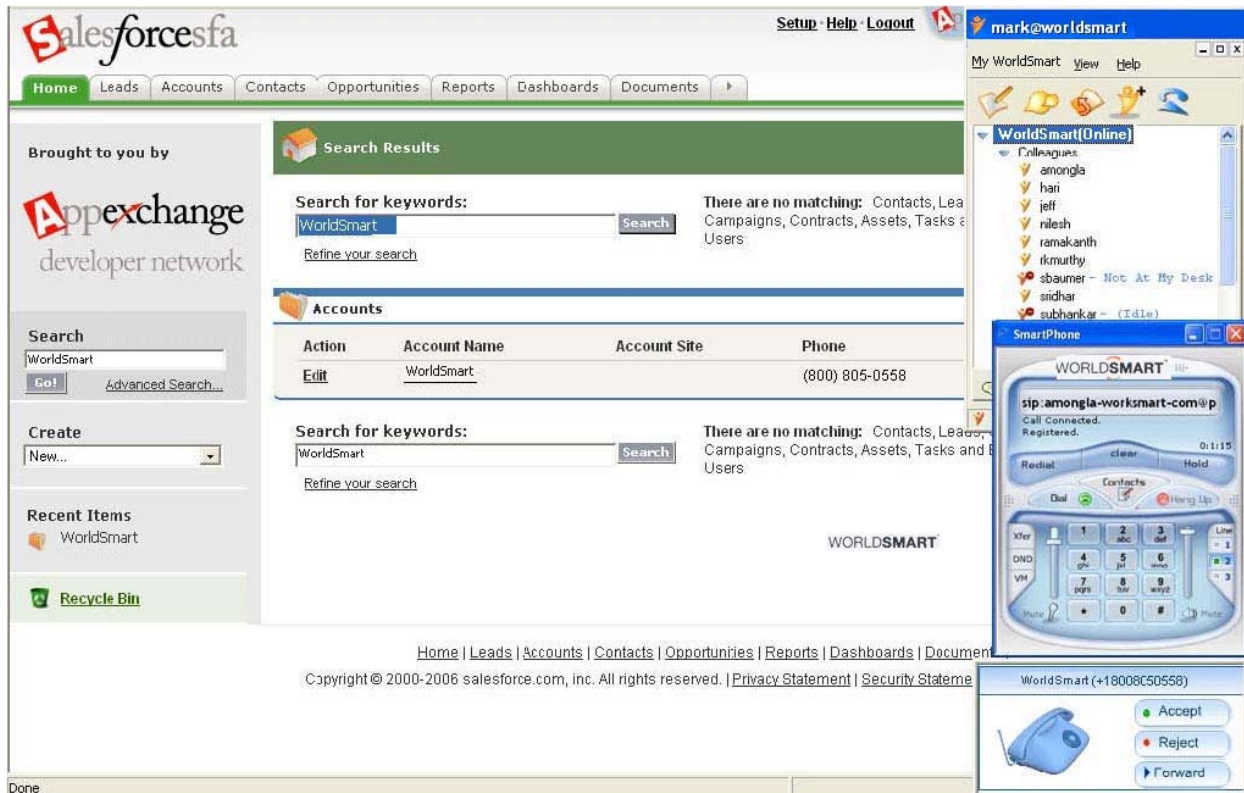


On the Salesforce preferences page, enter the following details:

- Check the box against **Enable Salesforce Integration**.
- Enter your user name (a valid email ID) and Password associated with that email.
- If you wish the system to remember the user name and password, check the box.
- Enter the phone number from which you want to call the calls.
- Click **OK**.

## Incoming Call Pop-up Screen

When you receive a call on the Salesforce enabled Messenger, the number from which the call has come in is searched and displayed with details of the contact, as shown below:



The screenshot shows the Salesforce user interface with a search for 'WorldSmart' in the Accounts section. The search results indicate no matches. Overlaid on the right is a 'SmartPhone' window showing an incoming call from 'sip:amongla-worksmart-com@p'. The call duration is 0:1:15. Below the call information are buttons for 'Accept', 'Reject', and 'Forward'.

## Logging Calls in Salesforce

When Salesforce enabled Messenger ends a call:

With outbound calls, Log a call screen is displayed when calls are made from:

- IP Phone 1
- IP Phone 2
- User Phone Number

User phone number is the PSTN phone number specified earlier in this setup.

Log a Call page is opened in the default browser as shown below. This screen lets you log the call into Sales-force as an event conveniently.



The image shows a composite screenshot of a Salesforce CRM interface. At the top left is the Salesforce logo and navigation tabs: Home, Leads, Accounts, Contacts, Opportunities, Reports, Dashboards, Documents. A sidebar on the left includes 'Brought to you by Appexchange developer network', a search bar, and 'Recent Items' with 'WorldSmart'. The main content area features a 'Log a Call' button (highlighted with an orange box) and a 'Task Edit' form. The form has two sections: 'Task Information' and 'Description Information'. The first 'Task Information' section is filled with: Assigned To: Rama Surya Narayana, Subject: Call, Due Date: 6/6/2006, and Status: Contact. The second 'Task Information' section is partially filled with: Assigned To: Rama Surya Narayana, Due Date: 6/6/2006, and Priority: Normal. To the right, a 'WorldSmart(Online)' window displays a list of colleagues: amongla, hari, jeff, Nilesh, preethi, ravi, rkmurthy, sanath, sbaumer - Kot. At My Desk, sidhar, and subhankar. Below this is a 'SmartPhone' window showing a virtual phone interface with a display reading 'No Active Calls Registered.', buttons for 'Radial', 'clear', 'Hold', 'Dial', 'Contacts', and 'Hang Up', and a numeric keypad.