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Salesforce.com® Integration User Guide

Publication Information

**Toshiba America Information Systems, Inc.
Telecommunication Systems Division**

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General End User Information

FCC Requirements

Means of Connection: The IPedge does not connect directly to the telephone network. All direct connections are made to a gateway. Please refer to the gateway manufacturer's documentation

Radio Frequency Interference

Warning: This equipment generates, uses, and can radiate radio frequency energy and if not installed and used in accordance with the manufacturer's instruction manual, may cause interference to radio communications. It has been tested and found to comply with the limits for a Class A computing device pursuant to Subpart J of Part 15 of FCC Rules, which are designed to provide reasonable protection against such interference when operated in a commercial environment. Operation of this equipment in a residential area is likely to cause interference, in which case, the user, at his/her own expense, will be required to take whatever measures may be required to correct the interference.

Underwriters Laboratory

This system is listed with Underwriters Laboratory (UL). Secondary protection is required, on any wiring from any telephone that exits the building or is subject to lightning or other electrical surges, and on DID, OPS, and Tie lines. (Additional information is provided in this manual.)



CP01, Issue 8, Part I Section 14.1

Notice: The Industry Canada label identifies certified equipment. This certification means that the equipment meets certain telecommunications network protective, operational and safety requirements as prescribed in the appropriate Terminal Equipment Technical Requirements document(s). The Department does not guarantee the Equipment will operate to the user's satisfaction.

Repairs to Certified Equipment should be coordinated by a representative designated by the supplier. Any repairs or alterations made by the user to this equipment, or equipment malfunctions, may give the telecommunications company cause to request the user to disconnect the equipment.

Users should ensure for their own protection that the electrical ground connections of the power utility, telephone lines and internal metallic water pipe system, if present, are connected together. This precaution may be particularly important in rural areas.

Before installing this equipment, users should ensure that it is permissible to be connected to the facilities of the local telecommunications company. The equipment must also be installed using an acceptable method of connection. The customer should be aware that compliance with the above conditions may not prevent degradation of service in some situations.

CAUTION! Users should not attempt to make such connections themselves, but should contact the appropriate electric inspection authority, or electrician, as appropriate.

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Hearing Aid Compatibility Notice: The FCC has established rules that require all installed business telephones be hearing aid compatible. This rule applies to all telephones regardless of the date of manufacture or installation. There are severe financial penalties which may be levied on the end-user for non-compliance.

Regulatory Information		
Area	United States	Canada
Safety	ULn	CSA
Network	FCC CFR 47 Part 68 TIA/EIA/IS-968	IC CS-03
EMC	FCC CFR 47 Part 15	ICES003:2004

Emergency Service (911) Warning

The IPedge system must have a constant source of electricity and network connection availability to function. In the event of a power failure or network availability outage the IPedge system's SIP service will be disabled. The user understands that in the event of a power or network outage the IPedge system will not support 911 emergency services and further, that such services will only be available via user's regular telephone line not connected to the IPedge system or gateway. User further acknowledges that any interruption in the supply or delivery of electricity or network availability is beyond Toshiba's control and that Toshiba shall have no responsibility for losses arising from such interruption.

Security Warning

All IPedge systems ship with the same default user names and passwords. To help protect your IPedge system from unauthorized administrator access change the user names and passwords as described in the new system installation section of the IPedge Install manual. An IPedge system that is not properly protected may be exposed to toll fraud, denial of service or other attacks.

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Toshiba America Information Systems, Inc. - Telecommunication Systems Division

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Toshiba America Information Systems, Inc.

Telecommunication Systems Division

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Introduction

This guide describes the capabilities and procedures for the Toshiba Call Control Adapter (plug-in) on Salesforce.com. This guide can be used in conjunction with other Salesforce documents.

Organization

This guide is divided as follows:

- **Chapter 1 – Installation** contains overview, procedures on setting up server and application.
- **Chapter 2 – Feature Operations** contains user procedures for key features.
- **Appendix – Browser Setup** describes the various settings required to get the application working on each individual user's system.

Important! This document may contain references to features that are for future implementation.

Conventions

Conventions	Description
Note	Elaborates specific items or references other information. Within some tables, general notes apply to the entire table and numbered notes apply to specific items.
Important!	<i>Calls attention to important instructions or information.</i>
Extension Number	Press to answer a call to the Extension Number. Each station can have multiple extension buttons. Incoming calls ring the extension button(s) from the top down. For example, station 10's extensions ring 10-1 first, then 10-2, 10-3, and 10-4. A station is considered busy when all extensions are being used. Note The naming convention for DKT assignments within Toshiba is Directory Numbers. For clarity and ease of understanding, the terms Extension Number and Phantom Extension Number will be used in this document in lieu of PDN and PhDN.
Arial bold	Represents telephone buttons.
Courier	Shows a computer keyboard entry or screen display.
“Type”	Indicates entry of a string of text.
“Press”	Indicates entry of a single key. For example: Type prog then press Enter .
Plus (+)	Shows a multiple PC keyboard or phone button entry. Entries without spaces between them show a simultaneous entry. Example: Esc+Enter . Entries with spaces between them show a sequential entry. Example: # + 5.
Tilde (~)	Means “through.” Example: 350~640 Hz frequency range.
➤	Denotes a procedure.
➤	Denotes the step in a one-step procedure.
See Figure 10	Grey words within the printed text denote cross-references. In the electronic version of this document (Library CD-ROM), cross-references appear in blue hypertext.

Related Documents/ Media

Note: Some documents listed here may appear in different versions on the Toshiba FYI site or in print. To find the most current version, check the version/date in the Publication Information on the back of the document's title page. The following are related documents for IPedge Meeting.

- IPedge Meeting Installation and Administration Manual

This document provides information on installing and setting up the Toshiba plug-in application with Salesforce.com. It also contains user and configuration procedures relating to the plug-in.

The Toshiba plug-in enables Salesforce application users to make and receive calls and perform other call control functions using the Salesforce application. The plug-in works if the software is paired with a desktop telephone or a softphone, such as UCedge.

Server Installation

Ensure you have the Toshiba plug-in license, part number: I-UC-SFORCE. Each Toshiba plug-in user must have a UC client account. Please refer to the UC Account Setup in Installation Manual.

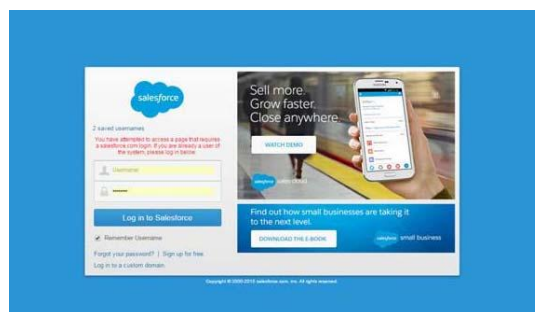
Installation Packages

Prerequisite: IPedge software 1.7.1 or later. Certain features require IPedge 1.7.3 or later software.

Note: The Toshiba plug-in is compatible with Salesforce Classic, it cannot be used with Salesforce Lightning.

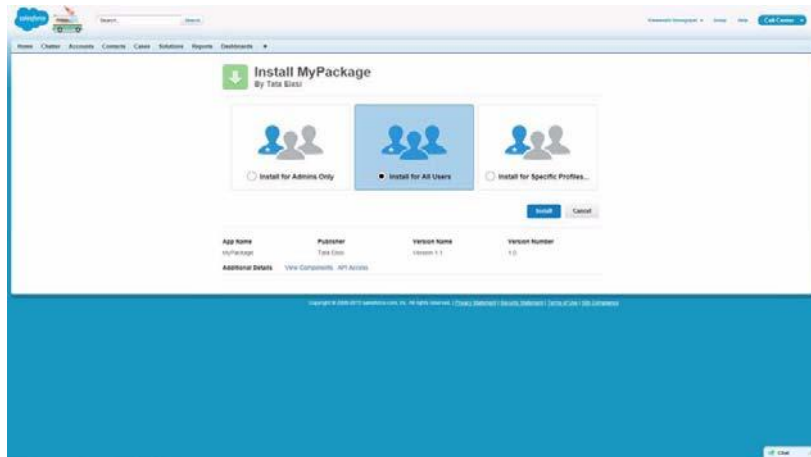
The following installation procedure is usually done by the administrator managing Salesforce.

1. Search for Toshiba plug-in on the Salesforce AppExchange web site (<https://appexchange.salesforce.com>), then follow the instructions for downloading and installation.
2. Enter the user credentials for Salesforce and login to Salesforce as prompted for the installation.



IPedge Installation

3. Select an installation type and click on Install (recommended - All Users).



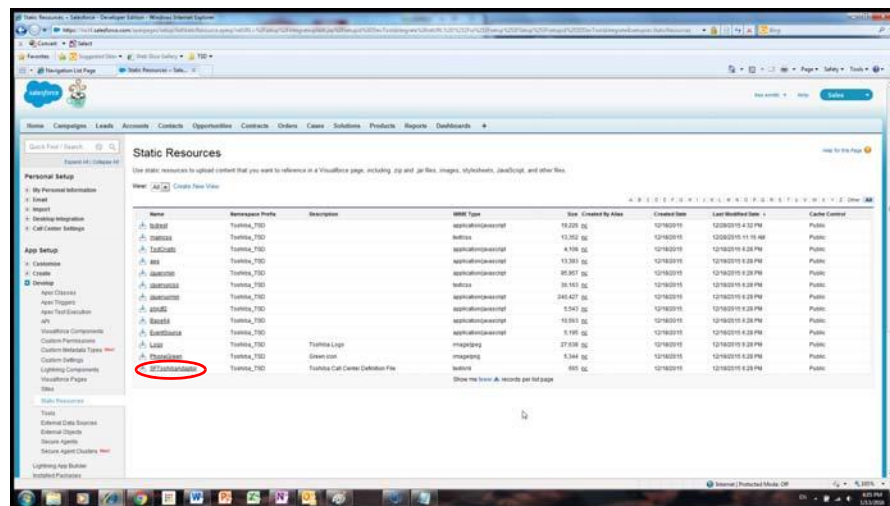
4. Once Installation is complete, click on the 'Done' button.
5. After completion of installation the 'Installed Packages' page will display the installation details.

Downloading the Call Center Definition File

The Call Center definition file must be downloaded to your local drive.

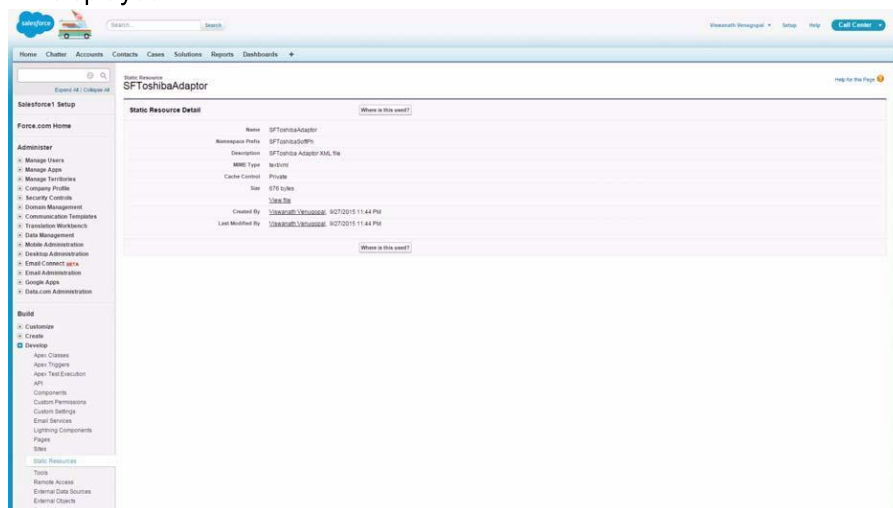
Important! The Toshiba Call Center definition file is required for configuring the contact center for the first time. Downloading the definition file is not required for subsequent upgrades. It will be available in the Static Resources after the first installation.

1. To configure the call center, from the left side pane under App Setup > Develop > Static Resources.
2. From the Static Resources page, in the Name column look for SFToshibaAdaptor txt/xml file.

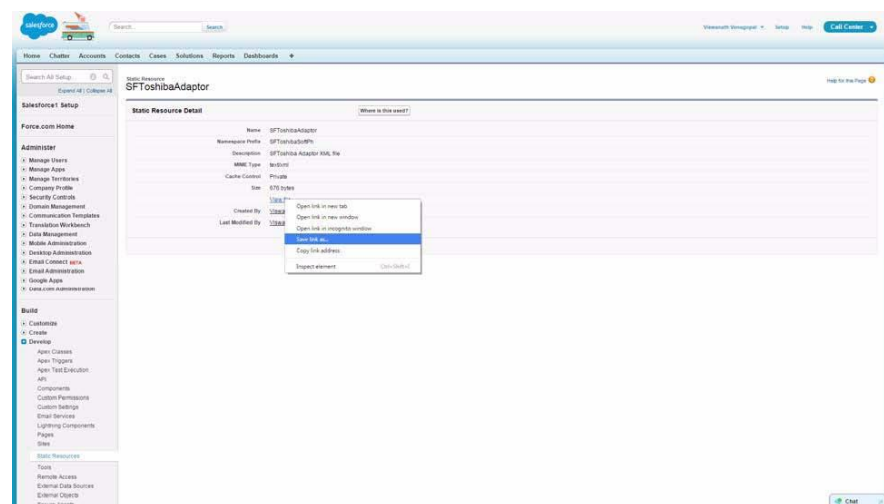


Installation

- Click on the SFToshibaAdapter file link. The details page will be displayed.



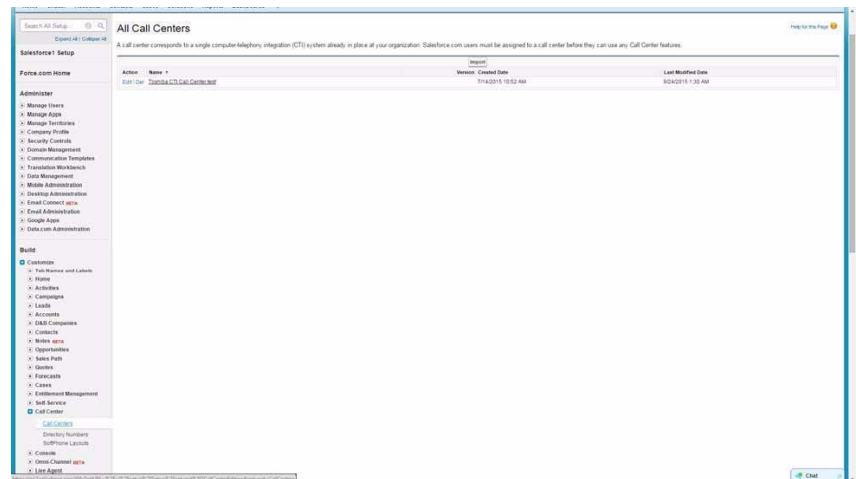
- Right click on the View file link and select "Save link as" and save the xml file locally. This XML file will have the call center configuration settings.



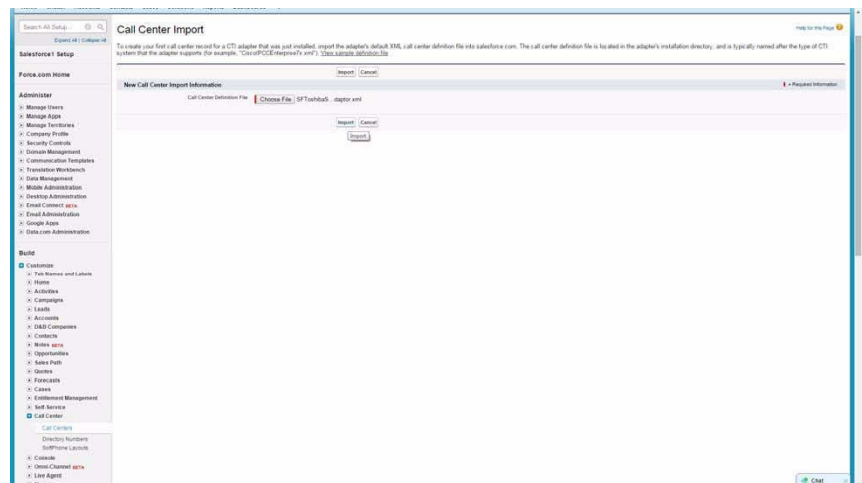
IPedge Installation

Configuring the Contact Center

1. From the left menu list, navigate to Build > Customize > Call Center > Call Centers.



2. All Call Centers page will be displayed with available call centers (if any call center added already) else the list will be empty. Now click on the Import button in the right side pane.
3. In the Call Center Import page click on “Choose File” and select the locally downloaded XML file and click on the Import button.



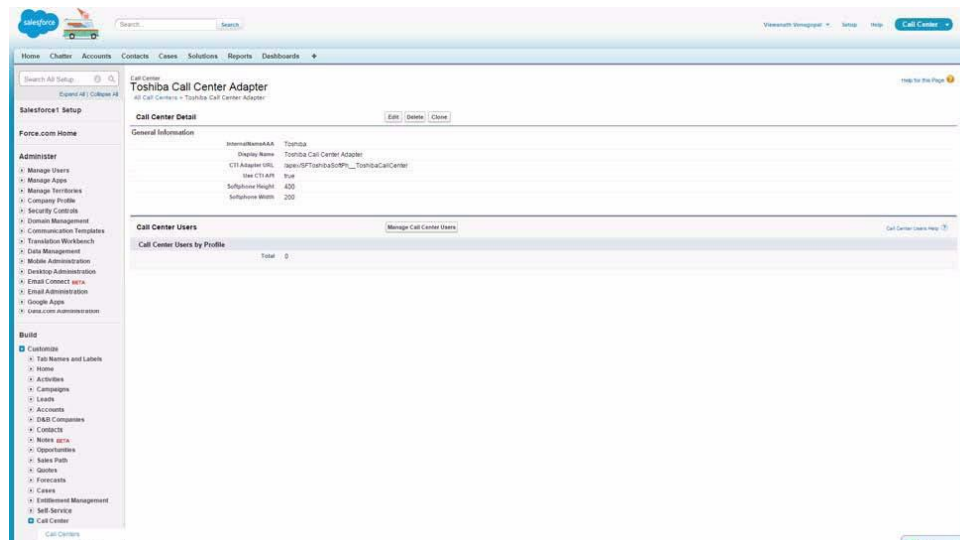
4. The file with call center settings will be successfully imported and the settings will be listed.

Installation

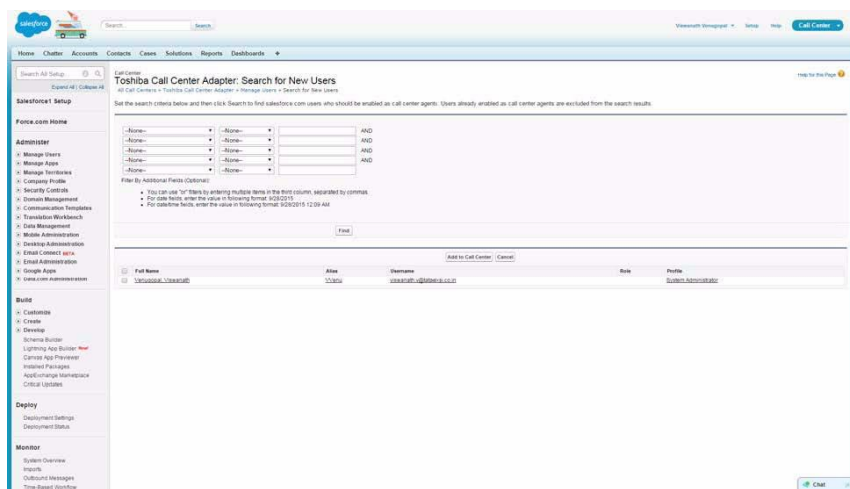
Manage Users

The steps below help you configure Contact Center users that use the Toshiba Call Control Adapter. Only a limited number of contact center users may have licenses and access to the Call Control Adapter. To add users:

1. From the Toshiba Call Center Adapter page, In the right side pane under Call Center Users section, click on the Manage Call Center Users button.



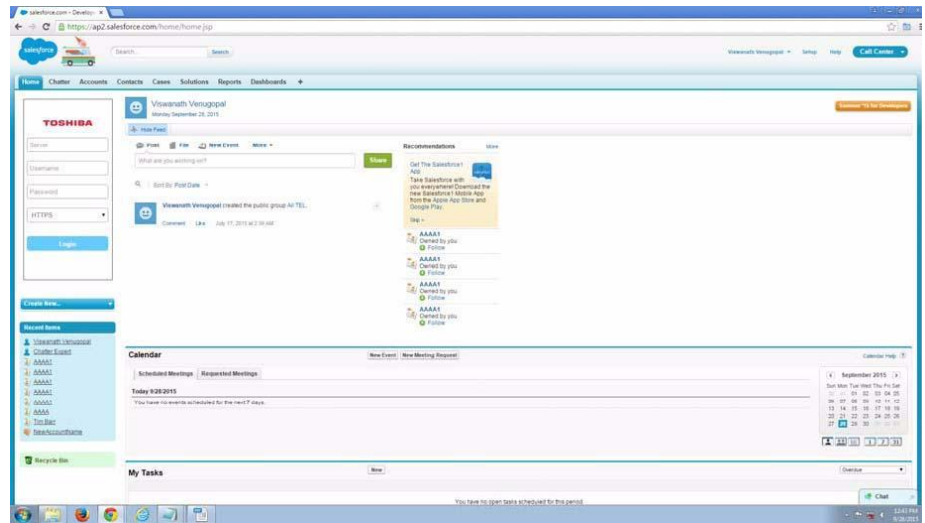
2. The call center manage users page will be opened. To add users, click on the “Add More Users” button.
3. The search page will be opened. Enter some criteria and/or click on the Find button.



4. The matching users will be listed.
5. Select the user (check the check box next to the user) and click on Add to Call Center button.
6. Make sure current login user also added.
7. The user will be added to the call center.

IPedge Installation

8. Click on Home tab in the top tab menu.

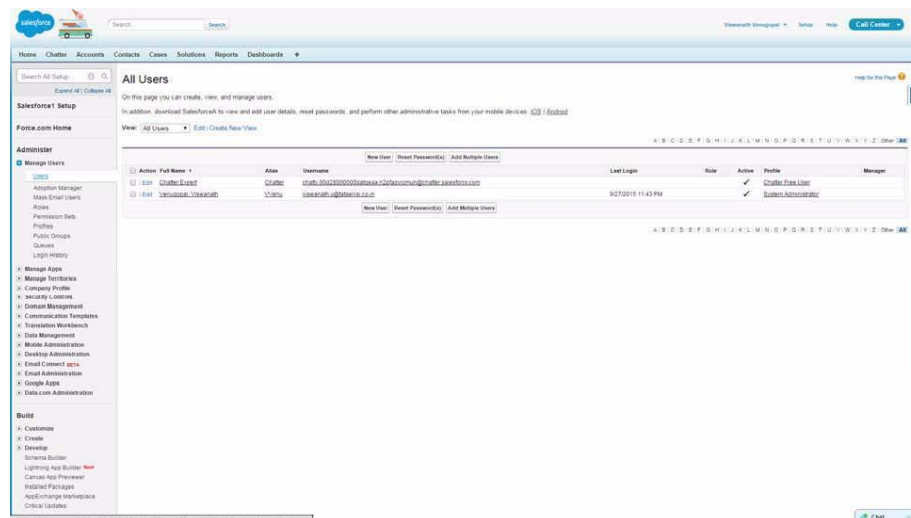


Installation

Adding Additional Users

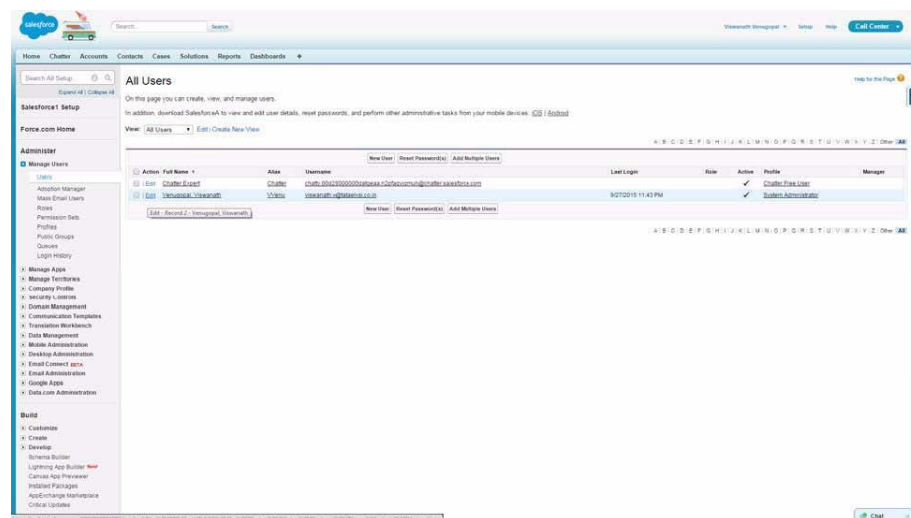
After completion of installation if additional users to be added,

1. From the top left side of the page click on the setup link, the setup options will be opened in the left side pane. Navigate to Administer "Manage Users."
2. The existing users will be listed.
3. Click on the New User button
4. Enter the User credentials and click on the Save button.

**Assign User to Call Center**

To give access to a user of a call center

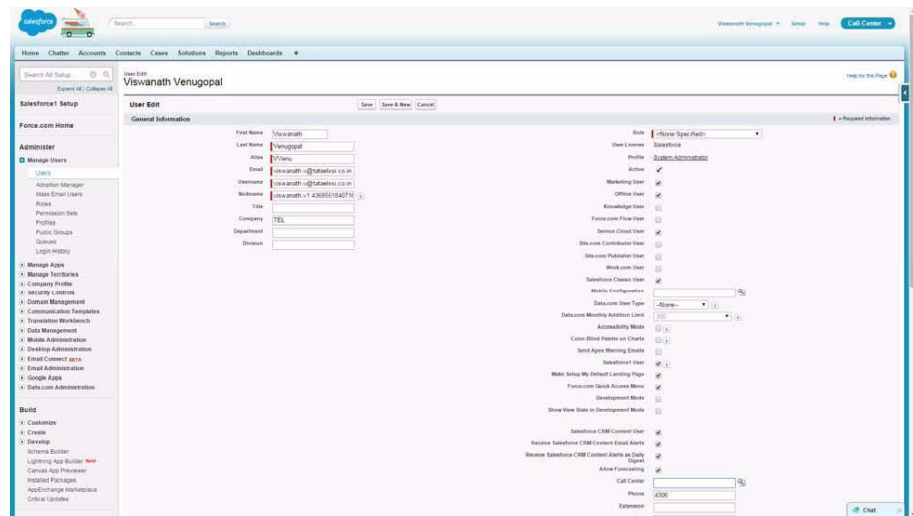
1. From the Manage users page (Setup - Administer – Manage Users - Users).



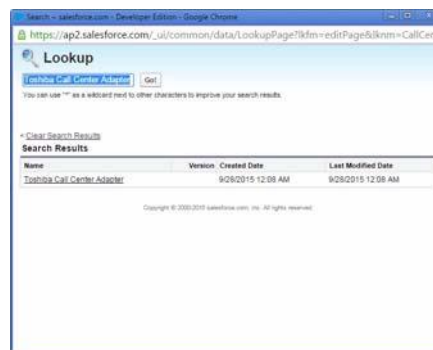
2. click on the Edit button corresponding to the user name which needs to be edited.

IPedge Installation

3. On the User Edit page, for the Call Center option (right bottom as in the screen shot below).
4. Click on the search icon.



5. a pop-up will be opened with available call centers,



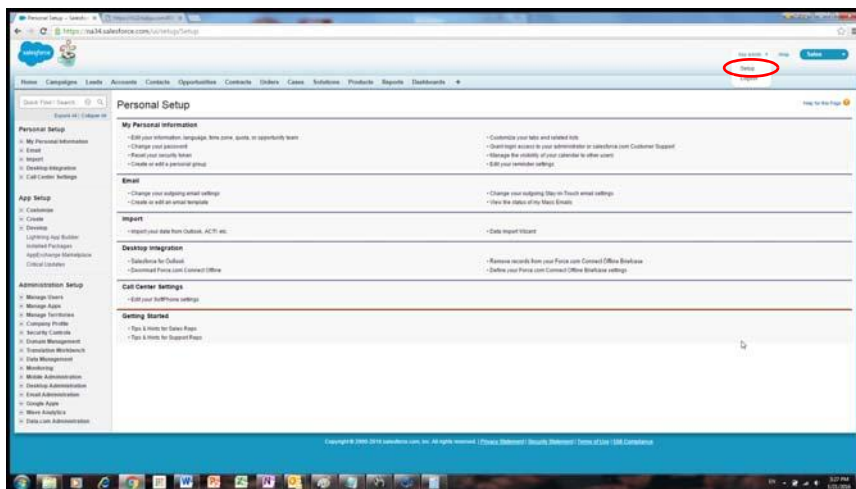
6. Select Toshiba Call Center Adapter (double click on that name).
7. The call center will be selected.
8. Click on the Save button to save the changes.
9. This will allow the user to access the call center.

Installation

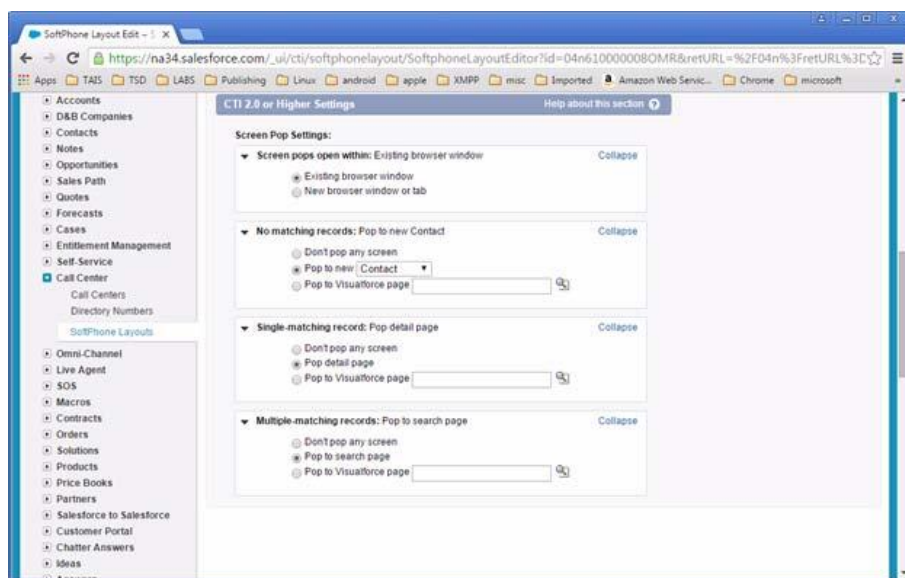
**Softphone Layout
(System
Administrator)**

This is a System Administrator function. Whether softphone is used or not, use the procedure below to change the layout of the Toshiba plug-in.

1. In Salesforce.com, click Setup located just below the your login name (shown below).



2. From the left pane, under App Setup, click the Customize drop down, then Call Center.



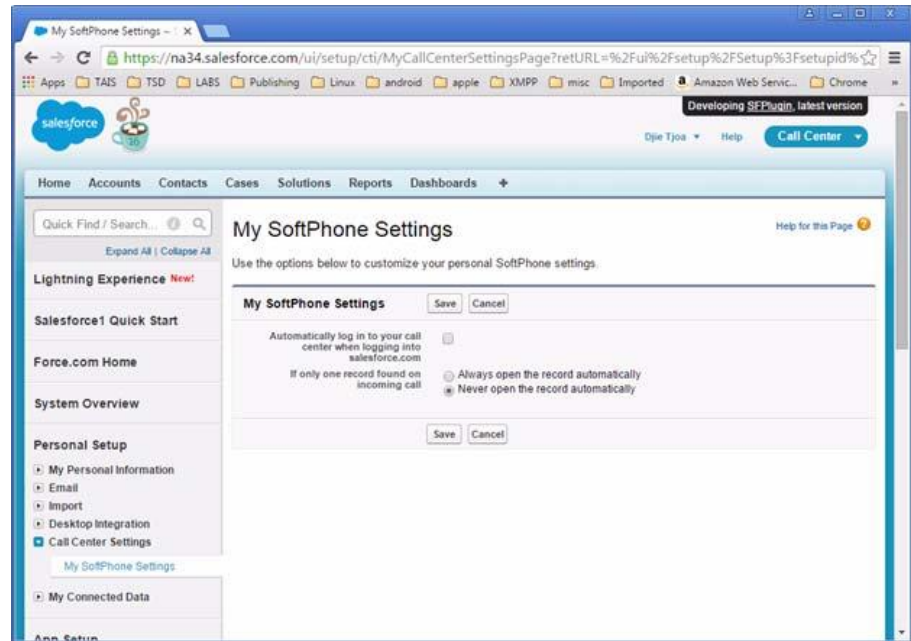
3. Expand all the CTI Settings (as shown above). Make the following selections:
 - Select Existing browser window under “Screen pops open within:”
 - Select Pop to new Contact under “No Matching records:”
 - Select Pop detail page under “Single-matching record:”
 - Select Pop to search page under “Multiple-matching records:”

IPedge

Installation

Softphone Settings (Individual User)

1. In Salesforce.com, click Setup located just below the your login name (shown below).
2. From the left pane, under Personal Setup, click the Call Center Settings drop down, then My SoftPhone Settings (shown below).
3. Select Never open the record automatically.



This chapter covers the Toshiba plug-in login for Salesforce and how to perform some of the key functions supported by this plug-in. All other Salesforce functions will stay the same. Refer to Salesforce documentation for the operation of the standard Salesforce features.

Login

1. Access salesforce.com via the browser. Please see the Appendix for the browser setup based on HTTP or HTTPS access.

Login Info

The screenshot shows the Salesforce user interface. A red rectangular box highlights the Toshiba login form on the left side of the dashboard. The form contains the following elements: the Toshiba logo, a domain input field with 'm12.tsdqa.com', a username input field with 'lisa.smith', a password input field, a dropdown menu set to 'HTTPS', and a blue 'Login' button. The background dashboard shows the user 'lisa.smith at Sales development' with a navigation bar, a calendar for June 2016, a 'My Tasks' section, and an 'Items to Approve' section.

2. Server: Enter the domain IP address of the IPedge or Application Server.
3. User Name: Enter the UC client account name.
4. Password: Enter the UC client password.
5. Click Login. Once logged in the following screen displays.

Note: This view shows the different extensions/lines. It also displays the Node ID associated with the server. The line heading specifies the

extension number including Node ID if a node ID is associated with the server.

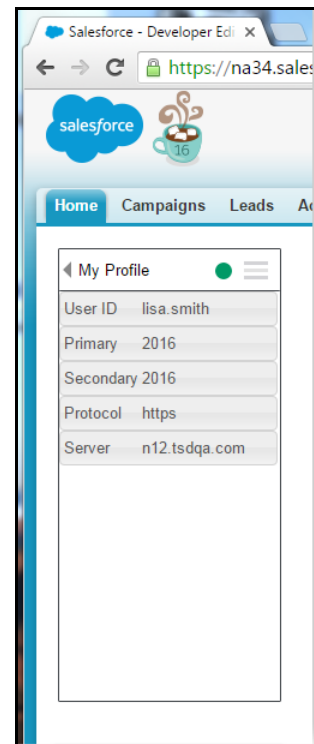


Navigation Icon

The Navigation icon  (3 line bars; shown on previous screen) contains the following menus: My Profile, Settings and the Logout button.

My Profile

The My Profile screen (read only information) contains the User ID, the Primary and Secondary DN information, the Protocol, and Server information.



Settings

Once you are logged in, click on the settings icon. The Settings menu contains the dialing plan options and feature options. These can be changed at any time.

Note: The settings cannot be changed while you're on a call.

Dialing Plan Specify the dialing plan for outbound calls. This plan is used to make calls based on the information found in your contacts.

Server Dialing Plan: Check this box to use the Net Server dialing plan when a call is initiated thru click-to-dial or the last 10 number dialed selection. When unchecked, the following simple dialing rule is used: number less than 7 digits, for example an extension will be dialed as-is. For a 7-digits or longer numbers, it will append the access code to the number. Example: 9-555-1212 or 1-917-555-1212.

Enter the appropriate information for the External Access Code, International Access Code and the Country Code.

Features Specify the behavior of the Toshiba plug-in in Salesforce.

Click to Dial: When this is checked, dialing from the contacts is enabled through the icon associated with the phone numbers in the contact. However, if this box is unchecked, dialing from contacts is disabled.

Wrap Up Time specifies the time, in seconds, for the Call Notes to dismiss. Wrap Up Time range is 0 ~ 99 seconds. The default Wrap Up Time is 15 seconds.

Enable auto screen pop: Checking this box will auto-pop the salesforce record when a call comes in and matches the number listed in the contact record.

Note: If there is only one record, then the My SoftPhone Settings could override this setting. So the My SoftPhone setting should be changed.

Line This gives you the option to select the default line to be used (shown right).

Home Accounts Contacts

Settings

Dialing Plan

☒ Server Dialing Plan

External Access Code: 9

International Access Code: 011

Country Code: 1

Features

☒ Click to Dial

☒ Enable auto screen pop

Line

Default: 122016 122016 125016

Logout Click this button to logout of the Toshiba Salesforce plug-in.

Call Answer

Click the Answer button to Answer a call from a caller already in your Contacts (shown below).

salesforce

Home Accounts Contacts Cases Solutions Reports Dashboards

TOSHIBA

122016

Dialed Number

Ringing 00:00:00

CallerID 123620

Call Notes

Subject

Call Result

Comments

Answer Button

125016

Create Now...

Search

Search All

Go!

Limit to items I own

Advanced Search...

lisa smith at Sales development

Thursday June 23, 2016

Calendar

New Event

Today 6/23/2016

You have no events scheduled for the next 7 days.

My Tasks

New

Items to Approve

Manage All

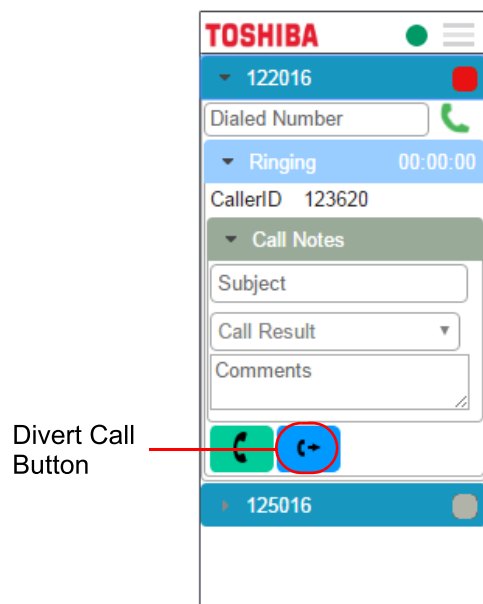
No records to display

Divert Call

For a non-ACD call, you have the option to divert the call to another number.

1. Enter the number in the Dialed Number field.

2. Click on the Divert call button.



Or

From Salesforce.com, click to dial any phone number with the line expanded.

Making a call

Calls can be made either by entering the number directly or by using a contact record. If you have multiple lines, then you can toggle between lines. The second line displays only if there is phantom DN configured for the primary DN.

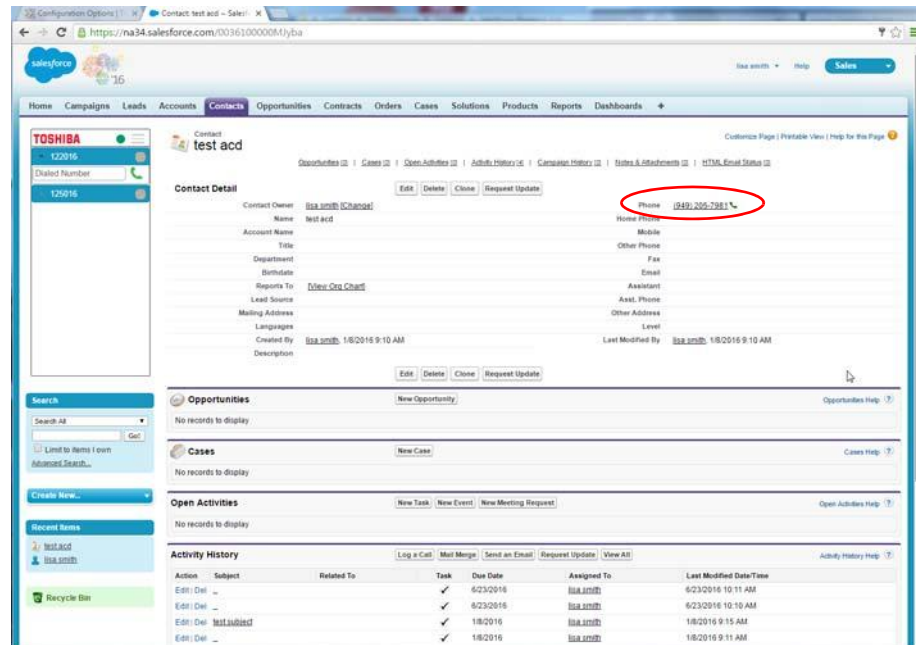
Direct Dial

1. Enter the number to dial in the Dialed Number field.
2. Click the green call icon (shown below).
When using this method to dial out, no dial plan is used.



Contacts

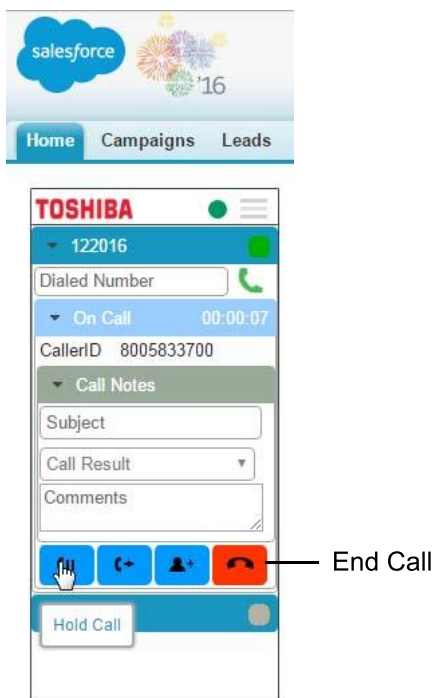
1. Click on the Contacts menu.
2. Select the appropriate contact to display the contact details.
3. Click the Phone number associated with the contact to make the call (shown below).



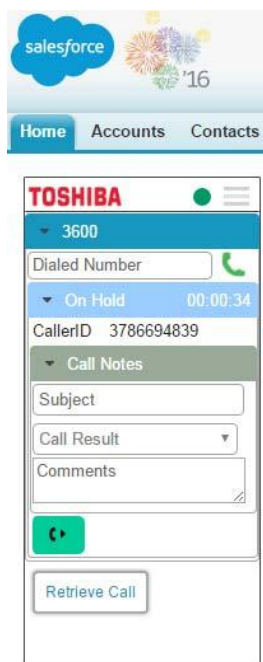
Feature Operations

Hold / End Call

The Hold, End Call and Retrieve call buttons are dynamic and display when on a call. The Hold button toggles between hold and retrieve depending on the state of the call. Calls can be placed on hold by clicking the Hold button when it displays or you can end the call by clicking the End call button (shown below).

**Retrieve**

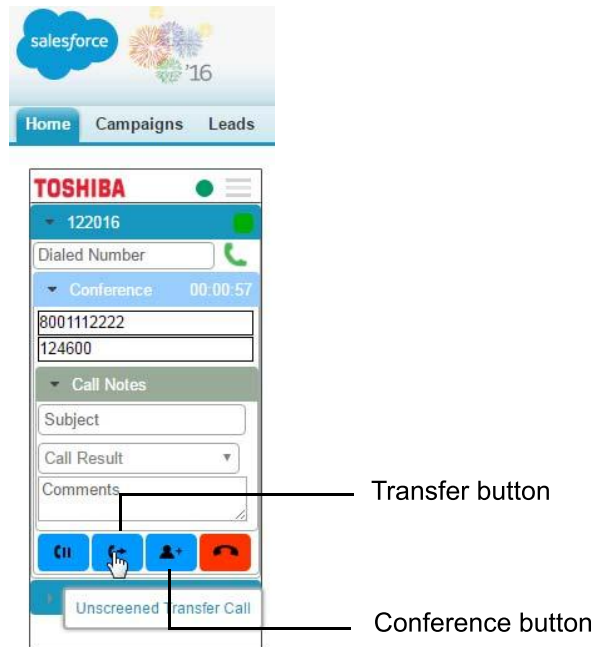
When a call is placed on Hold, the display will now have an option to retrieve the call (shown below).



Transfer

An incoming call can be transferred either as a unscreened transfer or a supervised transfer.

- **Unscreened Transfer** – The call is directly transferred to another extension without announcing the call (unscreened) or waiting to see if the called party is available.
 1. Answer the call.
 2. Enter the number to be transferred to in the Dialed Number field.
 3. Click the transfer button  (shown below).



- **Supervised Transfer** – The call is “supervised” during the transfer process so the call can be announced to the receiving party before completing the transfer.
 1. Answer the call.
 2. Enter the number to be transferred to in the Dialed Number field.
 3. Click the Conference button.
 4. Once the second call is answered. You can remain on the line and announce the call or hang up to complete a transfer.
 5. Click the transfer button (shown above).

Conference

A conference call can have up to a total of eight parties.

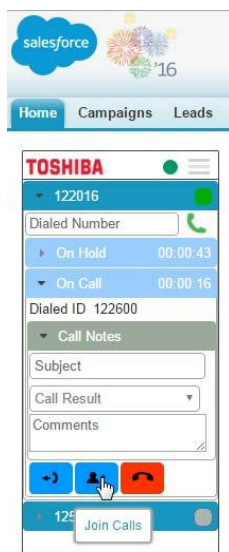
For an incoming call to be conferenced, follow the steps of the Supervised transfer.

To initiate a conference call:

1. Select the line to be used.
2. Enter the number of the party you want to conference.
3. Click the Conference button  .
4. Once the call is answered, click the Conference button again (Join call - shown below).
5. Repeat steps 1~4 to add more parties to the conference.

Or

If you're already on a call, click on an extension or number from the contacts and that number will automatically be added to the conference.

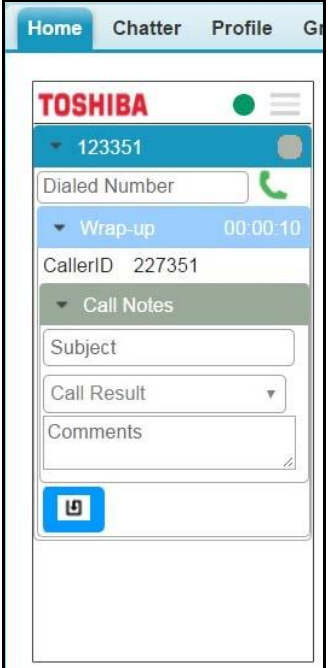


IPedge

Feature Operations

Call Notes

While on a call you can enter pertinent information about the call (shown in the red box below). This information will be logged in the call log stored in Salesforce.com activity as a completed task.



The screenshot displays the IPedge mobile application interface. At the top, there are navigation tabs: 'Home', 'Chatter', 'Profile', and 'G'. Below these, a header bar shows 'TOSHIBA' in red text, a green status indicator, and a menu icon. The main content area is divided into sections: a blue bar with '123351' and a phone icon; a 'Dialed Number' field with a green phone icon; a 'Wrap-up' section with a timer at '00:00:10'; a 'CallerID' field showing '227351'; and a 'Call Notes' section. The 'Call Notes' section contains three input fields: 'Subject', 'Call Result' (a dropdown menu), and 'Comments' (a text area with a pencil icon). Below these fields is a blue button with a white 'G' icon. The bottom of the screen shows a large empty white space.

The following information can be stored.

- **Subject:** Any text to describe a call
- **Call Result:** Select from the drop down menu
- **Comments:** Any text

Note: Call Notes will dismiss when the Wrap Up Timer expires after the call ends. Timer value can be configured in the Settings menu.

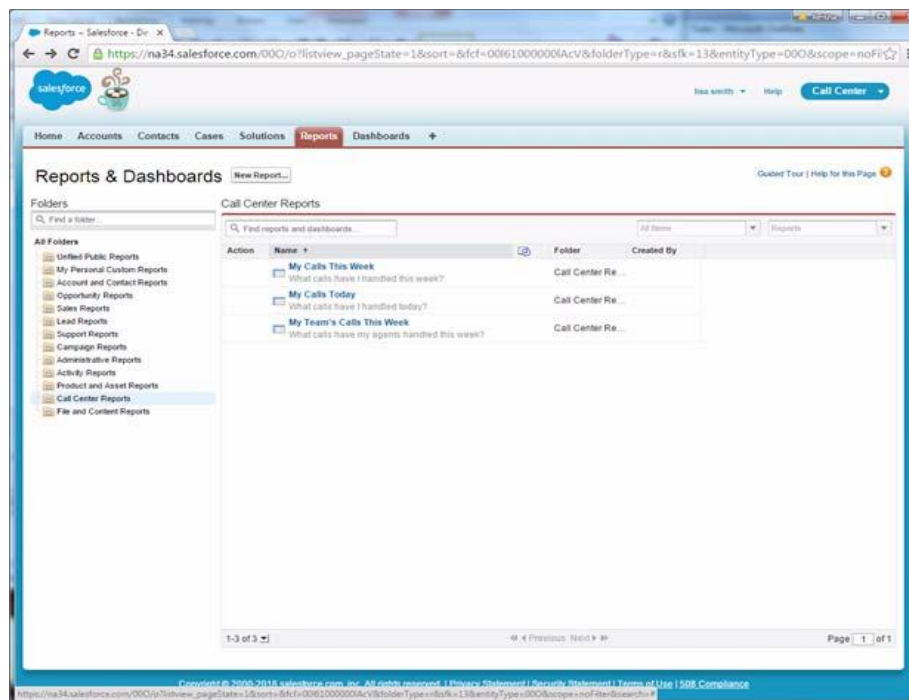
Feature Operations

Reports

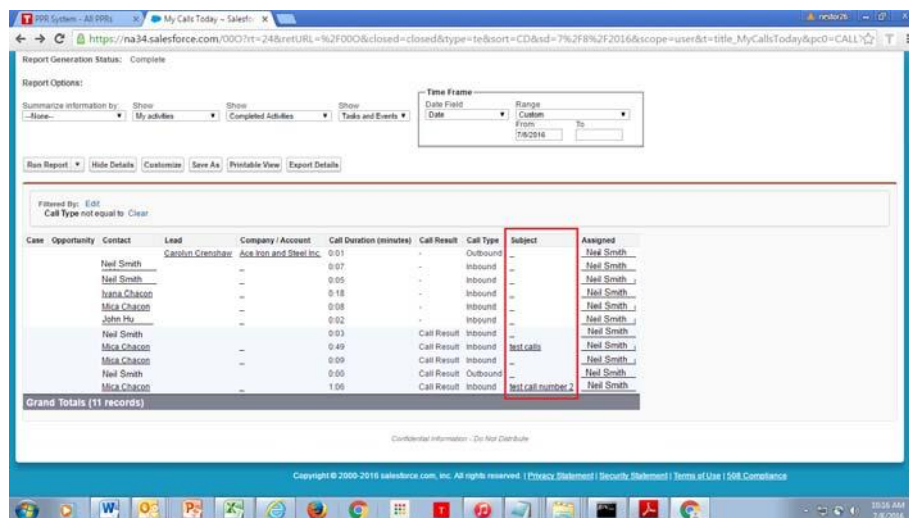
To view call reports:

1. Click the Reports menu.
2. Navigate to the Call Center Reports (shown below).

Calls are sorted under various categories; such as, My Calls This Week, My Calls Today, My Team's Calls This Week.



3. Clicking a specific category will display the reports (shown below).



Note: A call record is generated for a destination number. For a three-party conference call, two call logs are generated (one for each destination). The call log will also contain information indicating the end of the consultation call time.

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Appendix – Browser Setup

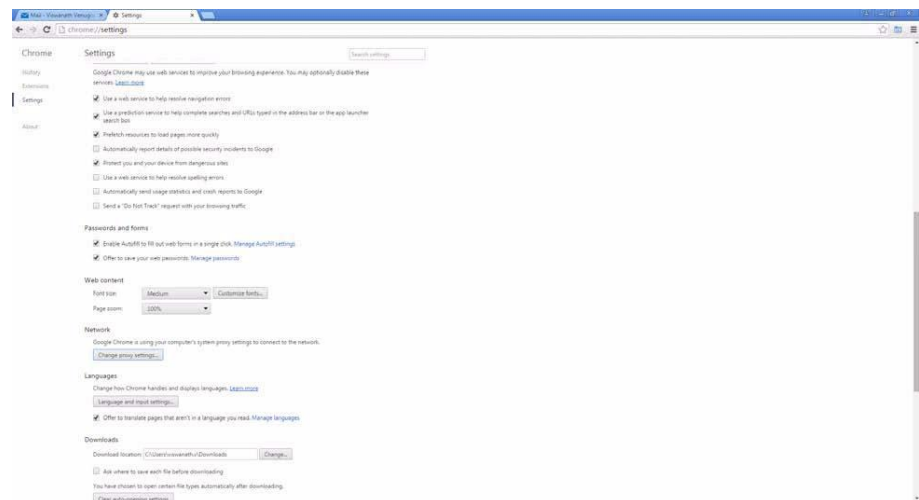
This appendix describes the various settings required to get the application working on each individual user's system.

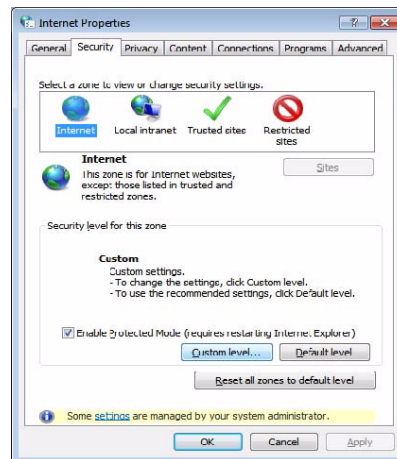
There are also some browser specific settings that need to be taken care of for the application to work. Please consult your System Administrator for these setups.

Chrome

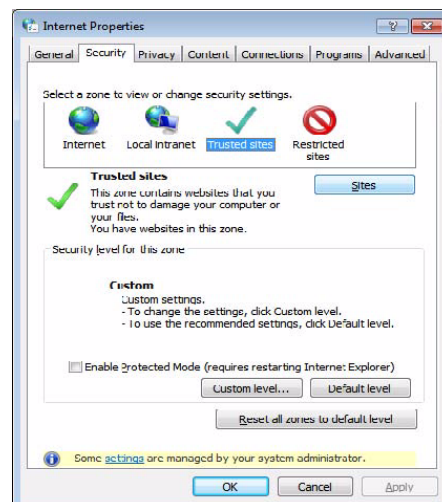
Settings

1. In the chrome browser, open the Settings page.
2. At the bottom click “Show advanced settings” link scroll further to Network settings and click on the “Change proxy settings” button and select the Security tab.

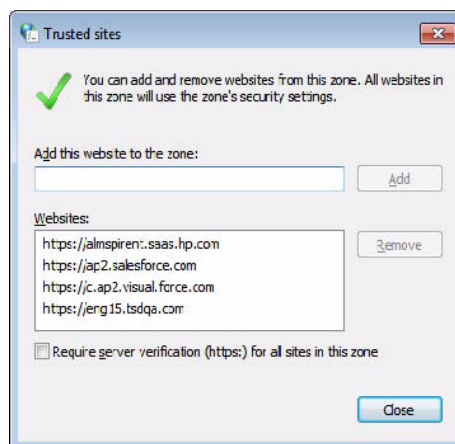




3. From the available options, select Internet option and click on the “Custom level...” button.
4. Security Settings pop-up will be opened; within that make the following changes:
Under ActiveX controls and plug-ins:
 - Allow ActiveX Filtering
 - Allow ScriptletsUnder Miscellaneous:
 - Allow Access data sources across domains
5. Click Ok to save the changes
6. Now select Trusted Sites option and click on the “Sites” button.



7. Add the URL of Toshiba server and salesforce server to trusted zone.

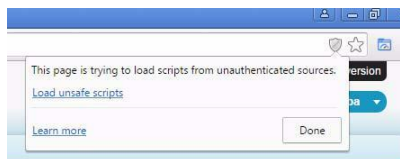


8. Click on Close and Save to save the changes made.

Browser Setup When Using HTTP Mode

When using chrome browser, in the login screen after entering the credentials and clicking on Login button, if HTTP is selected, or if the user has already logged in with HTTP and the sales force page is loaded using single sign on, a shield icon will be displayed in the right corner of the browser address bar .

Click on the shield icon and select “Load unsafe scripts” option.

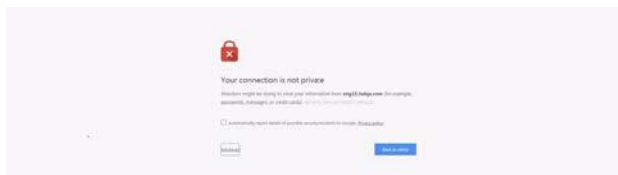


The page will get refreshed and will allow to login and work seamlessly. This will be effective until the browser is closed and opened again.

Browser Setup When Using HTTPS Mode

When HTTPS is selected for login and the system is using the private certificate,

1. Open a new tab and enter the <Toshiba server URL>:<port number>/ccrestapi/v1/devices example “https://ipedge.abc.com:8097/ccrestapi/v1/devices”.
2. You will get a warning screen as “Your connection is not private” click on Advanced link.



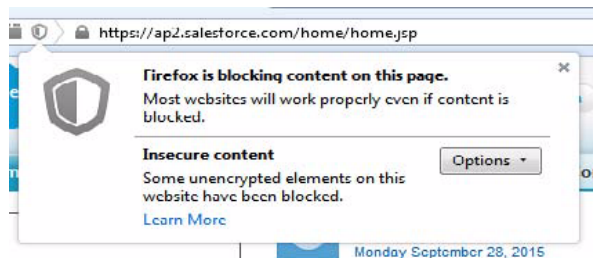
3. Click on Proceed and the page will show “OK.” It is ready to use Toshiba plug-in HTTPS mode with the private certificate. The user can logout and login to the Toshiba plug-in as long as the browser is not closed. If the user completely closed the browser, these steps must be repeated.

Firefox

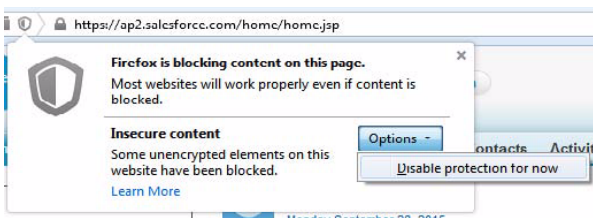
Browser Setup When Using HTTP Mode

When using Firefox browser, in the login screen after entering the credentials and clicking on Login button, if HTTP is selected, or if the user have already logged in with HTTP and the sales force page is loaded using single sign on a shield icon will be displayed in the left corner of the browser address bar.

1. Click on the shield icon



2. Select Options for “Insecure content” and select “Disable protection for now.”

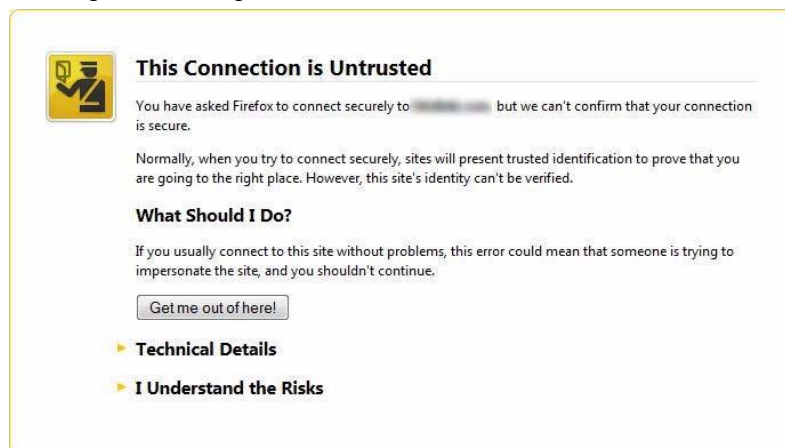


3. The page will get refreshed and will allow to login and work seamlessly. This will be effective until the browser is closed and opened again.

Browser Setup When Using HTTPS Mode

When using Firefox browser, with HTTPS selected for login credential before Login,

1. Open a new tab and enter the <Toshiba server URL>:<port number>/ccrestapi/v1/devices example “https:ipedge.abc.com:8097/ccrestapi/v1/devices”
2. You will get a warning screen as “The Connection is Entrusted



3. Click on the “Understand the Risks” link to proceed. The page will show “OK.” The Toshiba plug-in is now ready to be used in HTTPS mode with the private certificate. The user can logout and login to the Toshiba plug-in as long as the browser is not closed. If the browser is closed, these steps must be repeated.

Appendix – Browser Setup

Internet Explorer

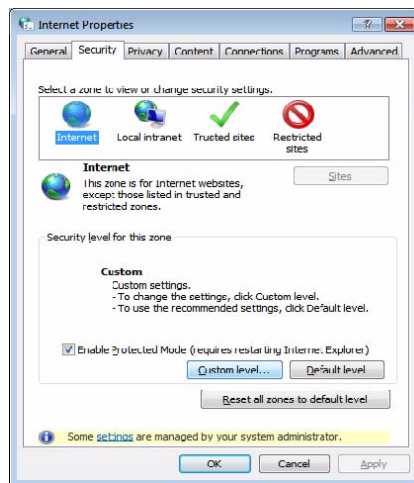
On the Salesforce.com site, you can find information for the Optimal Settings for Internet Explorer Browser. Click the link below to go to the site.

https://help.salesforce.com/apex/HTViewSolution?urlname=Optimal-Settings-for-Internet-Explorer-Browser&language=en_US

Or follow the procedures below.

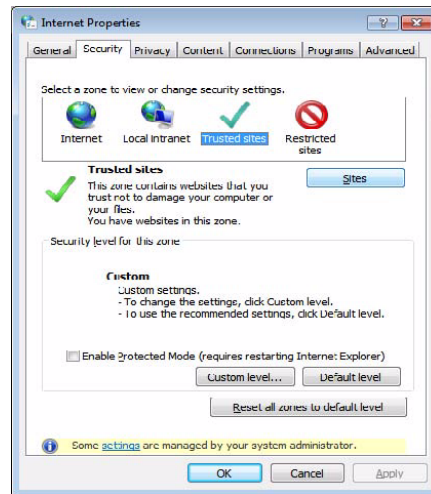
Settings When using Internet Explorer browser:

1. Open Internet Options by navigating through Settings - Internet Options.
2. Select Security tab.

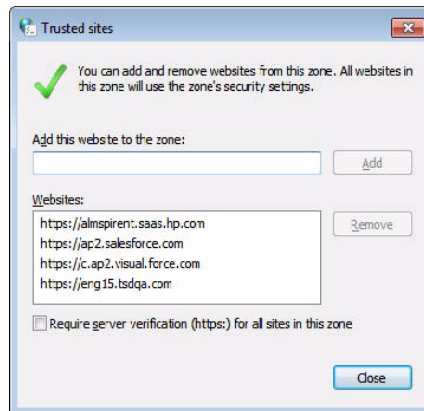


3. From the available options Select Internet option and click on the “Custom level...” button.
4. Security Settings pop-up will be opened within that; make the following changes:
 - Under ActiveX controls and plug-ins
 - Allow ActiveX Filtering
 - Under Miscellaneous
 - Allow Access data sources across domains
5. Click Ok to save the changes

6. Now select Trusted Sites option and click on the “Sites” button.



7. Add the URL of Toshiba server and salesforce server to trusted zone.



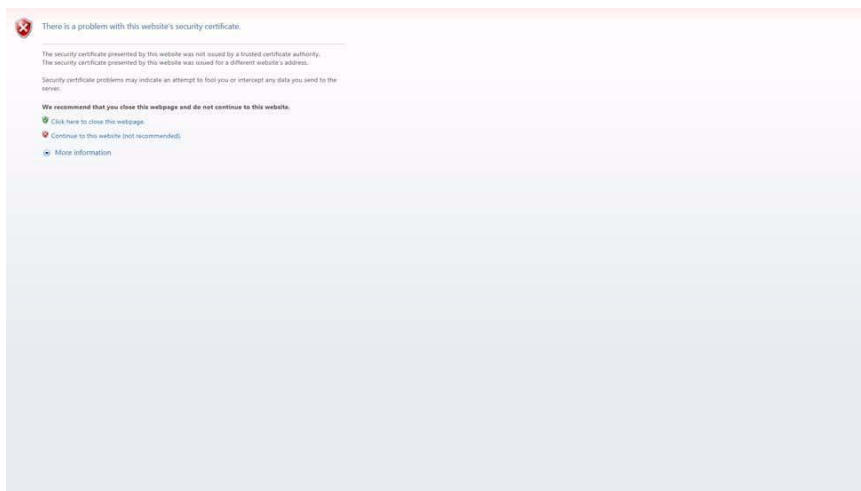
8. Click on Close and Save to save the changes made.
9. Click on the “Custom level...” button.
10. Security Settings pop-up will be opened within that make the following changes:
 - Under ActiveX controls and plug-ins
 - Allow ActiveX Filtering
 - Allow Scriptlets
 - Under Miscellaneous
 - Allow Access data sources across domains
11. Click on the advanced tab.
12. In the settings options navigate to Security section
13. Check Allow active content to run in files on My Computer
14. Check Enable native XMLHTTP support.

Appendix – Browser Setup

Using HTTPS

When using IE browser, with HTTPS selected for login credential before Login,

1. Open a new tab and enter the <Toshiba server URL>:<port number>/ccrestapi/v1/devices example “https://ipedge.abc.com:8097/ccrestapi/v1/devices”.
2. You will get a warning screen as “Your connection is not private” click on Advanced link.



3. Click on Proceed and the page will show “OK.” The Toshiba plug-in can now be used in HTTPS mode with the private certificate. The user can logout and login to the Toshiba plug-in as long as the browser is not closed. If the user completely closed the browser, these steps must be repeated.

Using HTTP

Note: If HTTP is used, under Miscellaneous, make sure that “Display mixed content” is enabled.

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