

Configure Call Pop-Up Window to Launch Salesforce.com

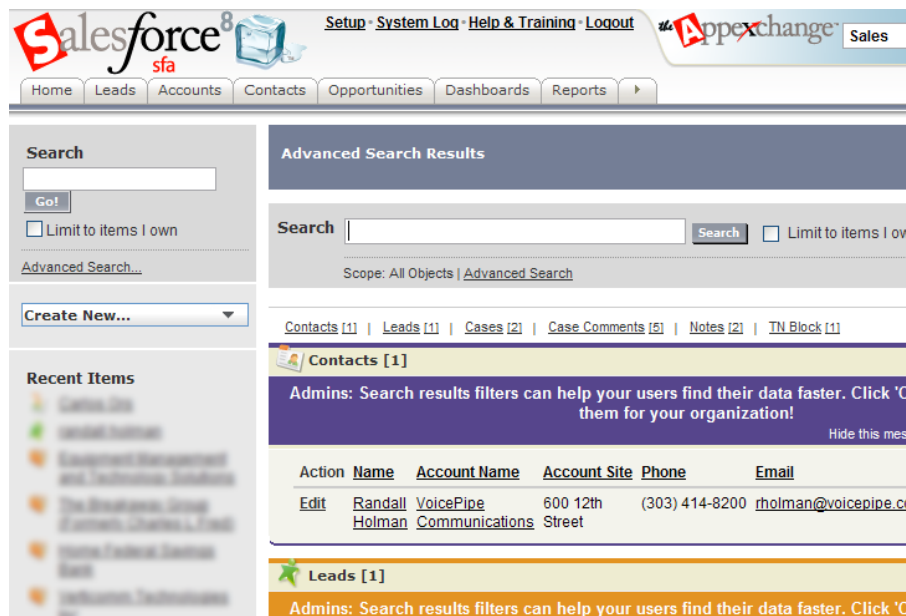
Overview

A web launcher feature was added to release 14 of the Telephony Toolbar. This feature allows a web URL to be launched during an incoming call and populate URL tokens with the caller phone number and caller name. For example, you could configure the URL to find your caller's name or phone number in a third-party directory or customer relationship management (CRM) system – including Salesforce.com.

An incoming call arrives and the call pop-up window appears in the lower right-hand corner of your screen. The caller name and phone number appears in the window. Click on the Web Launcher icon to navigate to Salesforce.com and perform an automatic search for either the caller name or phone number.



Salesforce.com will launch in your web browser and do a search for the caller name or caller phone number.



You can either pick up your phone's handset or click the caller ID inside the Call Pop-Up window to answer the call.

How to Configure the Web Launcher for Salesforce.com

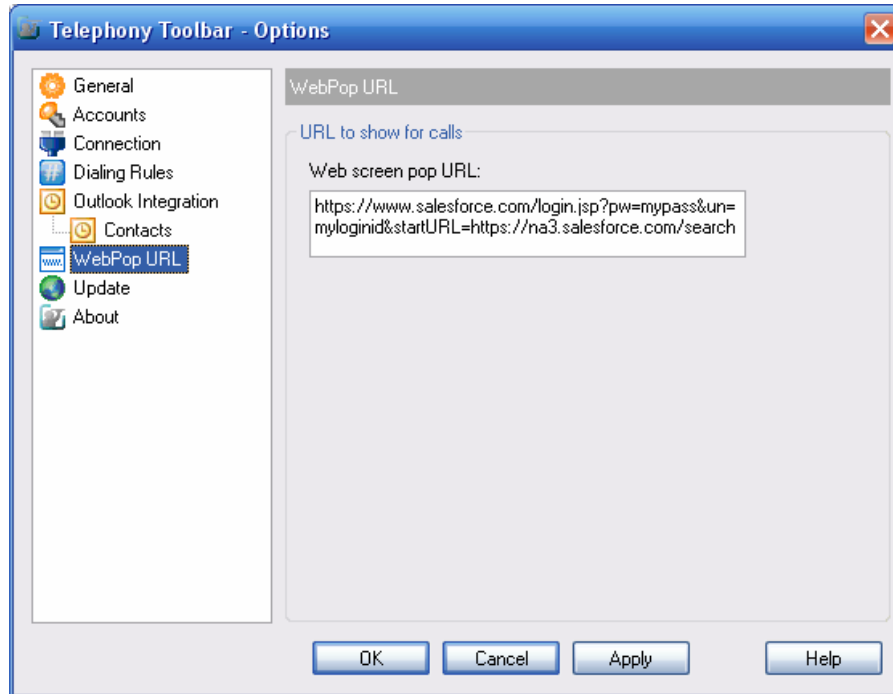
You will configure the Web Launcher from the Telephony Toolbar Options menu. From either Internet Explorer or Outlook where the Telephony Toolbar is available, click the "options" button.



Select “WebPop URL” from the options menu. Then copy and paste the following URL into the “Web screen pop URL” field, substituting your own Salesforce.com login id and password:

(Copy and paste this entire URL string, substituting your Salesforce login id and password)

`https://www.salesforce.com/login.jsp?pw=your_salesforce_password&un=your_salesforce_id&startURL=http
s://na3.salesforce.com/search/SearchResults?sbstr=__REMOTE_PHONE__+OR+__REMOTE_NAME__`



Click on the “OK” button to save the WebPop URL and to close the options dialog box.

The Web Launcher in the Call Pop-Up window is now ready to search for a Salesforce.com contact when you receive an incoming call.

(Note: you can also start the Web Launcher when making an outbound call as well)