INTER-TEL®

Endpoint Connector

User Guide

Notice

This user guide is released by Inter-Tel, Inc. and provides information necessary to use the Inter-Tel Endpoint Connector adapter. The guide contents, which reflect current Inter-Tel standards, are subject to revision or change without notice.

Some features or applications mentioned may require a future release and are not available in the initial release. Future product features and applications are subject to availability and cost. Some features or applications may require additional hardware, software, or system administrator assistance.

For sales, service, or technical support, contact your local authorized Inter-Tel provider:

Enter provider information above

If you have any questions or comments regarding the content of this manual, contact the Inter-Tel Technical Publications Department at:

tech_pubs@inter-tel.com

Welcome

The Inter-Tel® Endpoint Connector for the Salesforce AppExchange® softphone is an interface to your desktop phone that allows you to perform the same functions directly from your PC while logged on to Salesforce.com. In addition, the Endpoint Connector helps you access, view, and link Salesforce customer relationship management (CRM) information more efficiently.

Prior to using this guide you should be familiar with features of the Salesforce Web site. For detailed information about the Salesforce features, refer to the **Help & Training** information link located at the top of their Web page. This guide is for using features of the Inter-Tel Endpoint Connector and only those features of the Endpoint Connector are described in this guide.

This guide includes the following sections:

- **Getting Started:** Logging into the Inter-Tel Endpoint Connector.
- **Using the Endpoint Connector:** How to use the Endpoint Connector features of the softphone, such as placing a call, receiving a call, and call logging.
- **Configuring the Endpoint Connector:** Selecting personal preferences for the Endpoint Connector.
- **Upgrading the Endpoint Connector:** How to upgrade the software after it is initially installed with a new version of the Endpoint Connector.
- **Troubleshooting:** Information about troubleshooting if you are experiencing problems with the Endpoint Connector.

Getting Started

You must log on to the Salesforce.com Web site before you can log on and use the Inter-Tel Endpoint Connector. Contact your system administrator if you have questions about installation of the Endpoint Connector application. After the Inter-Tel Endpoint Connector application is installed on your PC and you log on, you can begin using it to perform the following functions:

- Place a call (page 4)
- Answer a call (page 6)
- Place a call on hold and retrieve a held call (page 7)
- Transfer calls using announced and one-step transfers (page 7)
- Initiate a conference call (page 8)
- Change your DND status (page 9)
- Display information related to a call (page 10)
- Associate calls to a record (page 10)
- Enter comments into a call log (page 10)

Log On

When you log on to the Salesforce Web site one of the following screens appears to start the Endpoint Connector. Depending on how your Inter-Tel phone system is configured, it may be necessary to enter an Agent ID and Account Code when you log on.

Agent (hunt group) logon screen

Enter your login credentials...

Extension

Agent ID

Account Code

Log In

INTER-TEL

Station logon screen

Enter your login credentials...

Extension

Account Code

Log In

INTER-TEL

To log on:

1. Type information in the text boxes that apply.

   - **Extension:** The extension number that you are using with the adapter.

   - **Agent ID:** If you normally log on to the phone system as an agent of a hunt group, enter your ID number.

   - **Account Code:** If you typically use an account code to place an external call or the system requires you to use an account code, enter that number. Once the account code is entered, you will not need to re-enter it for external calls when dialing with the Endpoint Connector.

     The account code is displayed in the Endpoint Connector for all external calls, whether it is entered during logon or manually entered later.

NOTE	Account codes are *not* required or verified as part of your log on credentials. If you enter an account code that is invalid, you will need to log off and then log on again with a valid account code to use the Endpoint Connector for placing external calls.

2. Click **Log In**. To save your credentials and log on automatically, see "Auto Login" on page 12.

Inter-Tel Endpoint Connector

Information displayed by the Endpoint Connector changes according to the function that you are performing. The figure below shows the Endpoint Connector in an idle state, after you log on.

Endpoint DND status

Log on credentials

Line number and status
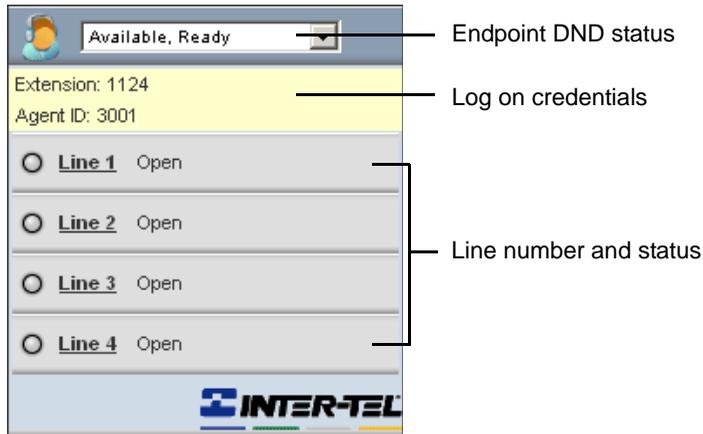
Using the Endpoint Connector

While logged in, you can also use your desktop phone manually and the Endpoint Connector will display the operation you are performing. For example, when you place a call manually the Endpoint Connector line status shows "Dialing," and then changes to "On Call" when the call is connected. Once connected, a record of the call is stored and a call log opens where you can enter comments.
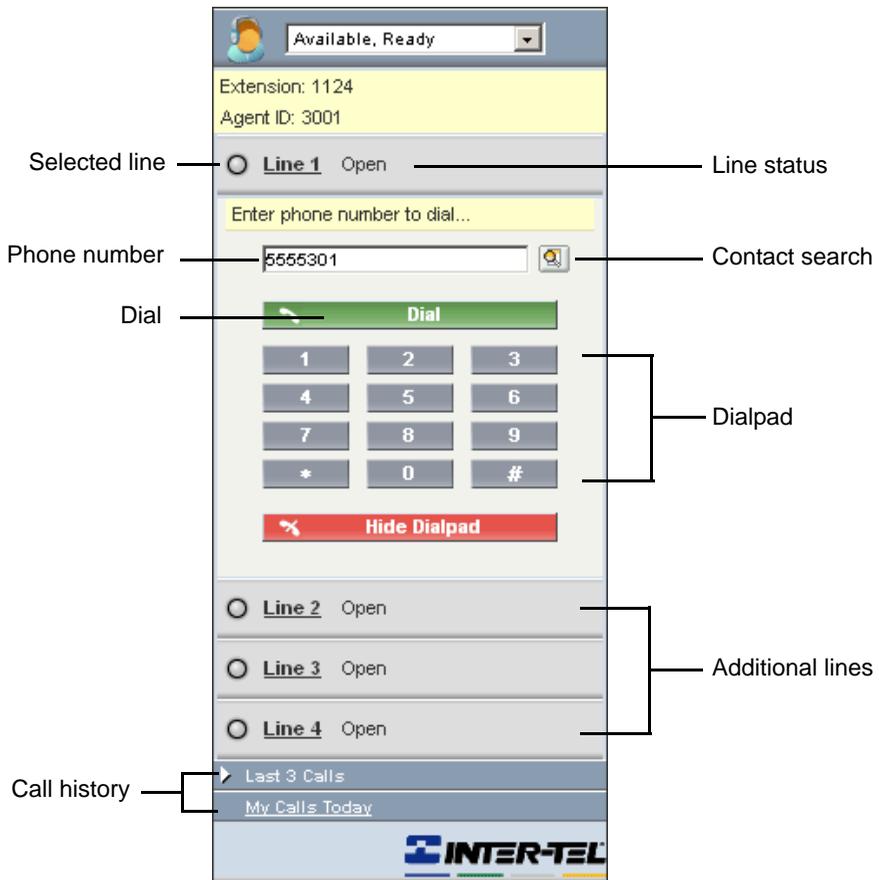
NOTE	The Endpoint Connector is for placing or answering calls; you *cannot* use it to access or change features of the desktop phone.

The following section describes the functions and features of the Endpoint Connector.

Place a Call

When you select a line to place a call the Endpoint Connector panel refreshes to show a phone number box, search feature, and dialpad.

Selected line — Line 1 Open — Line status
Phone number — 5555301 — Contact search
Dial — Dial
Dialpad
Line 2 Open
Line 3 Open — Additional lines
Line 4 Open
Call history — Last 3 Calls / My Calls Today

To place a call:

1. Select a line to use.

2. Type a number into the phone number box or use the dialpad to enter a number.

NOTE	When dialing from the Endpoint Connector, you do *not* need to enter an Outgoing Access code (*i.e.,* 8 or 9) or Long Distance prefix (1) to place the call.

3. Click [⤺ Dial] to place the call.

> **NOTE** When placing an external call, after you click **Dial** a call log appears in the Endpoint Connector. The call log is automatically saved when the call is ended. For details, refer to "Call Logs" on page 11.

While on a call, you can place another call by selecting a second line and repeating steps 2 and 3. The original call is automatically put on hold when you click **Dial**.

To hang-up a call:

Click [✕ End Call] at anytime to hang up the call.
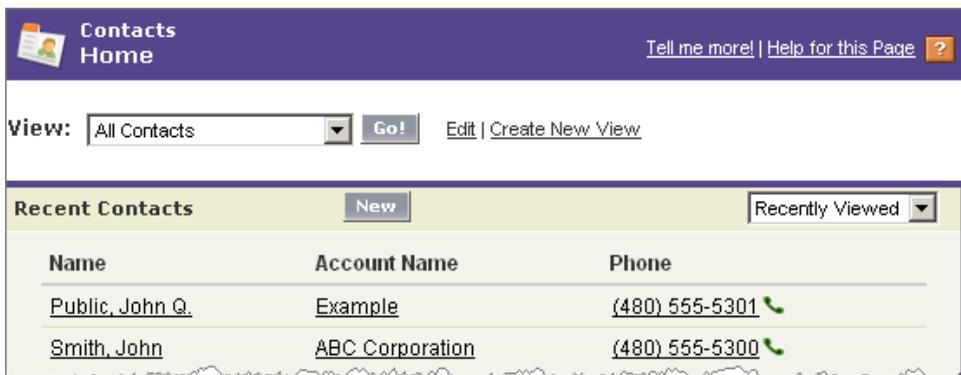
Search Contacts

From the Endpoint Connector you can search and view contact information in your directory.

To search contacts:

1. Click 🔍 and the Lookup window opens. The Lookup window is where you enter search criteria.
2. Select an object from the list.
3. Type all or part of a name in the **Search** box to show results.
4. Select a name from the list of results.
5. Click the number to copy it into the phone number box in the Endpoint Connector.
6. Click [⤺ Dial].

Click-to-Dial

The Click-to-Dial icon 📞 appears in the main screen when it is associated with a contact (see figure below), lead, activity, or account. Click 📞 or the number to automatically dial the phone number from the Endpoint Connector. If Click-to-Dial is not available the icon appears dimmed. The Endpoint Connector application must be running to use Click-to-Dial.
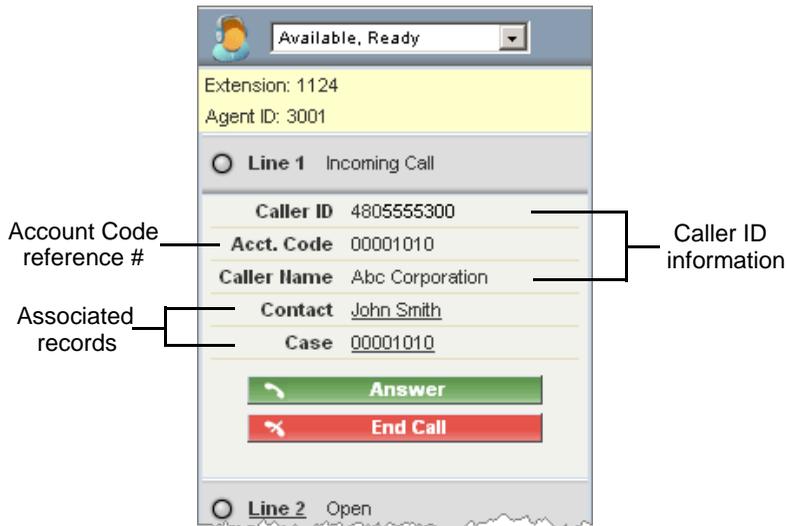
Answer a Call

Incoming calls appear on the first available line of the Endpoint Connector and initially display Caller ID information. When the name of a caller is available, it is displayed in the Endpoint Connector as Caller Name. Depending on the phone system configuration, an account code reference number is displayed that can be used when creating associated records, if desired.

A search of the Salesforce database is performed using the Caller ID, account and name to find associated records. The Endpoint Connector view is updated and results are displayed, as shown in the example below. You can select an associated record and view details of it in the main screen before or after answering the call. For additional information, refer to "Associated Records" on of this guide.

Account Code reference # ⎯⎯⎯

Caller ID information

Associated records

To answer a call:

Click **Answer** when you receive a call.

After you click **Answer** or pick up the handset the line status changes from "Incoming Call" to "On Call" and options for hold, transfer, and conference are available. A call duration timer is also displayed which begins tracking the length of the call.

Call Hold

You can place an existing call on hold to answer an incoming call or place a call.

To place a call on hold:

While on a call click [II] to place the call on hold. If you receive a call while on a call, click [↘ Answer] for the incoming call will automatically place the original call on hold.

To retrieve a call on hold:

Click [⚓ Retrieve From Hold] and the original call is retrieved.

Call Transfer

There are two types of call transfers; announced transfer and one-step transfer. An announced transfer places the original call on hold that allows you to talk to the third-party first, and then transfer the call. A one-step transfer immediately transfers the call to the third-party.

To perform an announced call transfer:

1. Click [👥] to begin a call transfer. The Endpoint Connector softphone refreshes and shows the call transfer options.

2. In the phone number box, enter the number of the person to whom you are transferring the call, and then click [↘ Initiate Transfer].

3. The next available line in the Endpoint Connector softphone appears as another call. When the person answers, announce the call, and then click [↘ Complete Transfer] to complete the transfer.

To perform a one-step call transfer:

1. Click [👥] to begin a call transfer. The Endpoint Connector softphone refreshes and shows the call transfer options.

2. In the phone number box, enter the number of the person to whom you are transferring the call, and then click [⚓ One-Step Transfer]. The call is automatically transferred.

To cancel a call transfer:

Click [✘ Cancel Transfer] to exit the transfer and return to the original call.

Conference Call

You can use the Endpoint Connector to create a conference call with up to three other parties.

To create a conference call:

1. Place and establish a call. After you are connected the Endpoint Connector softphone refreshes and shows the different call options.

2. From this established call click [icon] and a dialpad is displayed.

3. Enter the number of the party you want to conference with the original call, and then click [Initiate Conference]. This places the call on the next available line and puts the original call on hold.

   You can click [Cancel Conference] at this time to exit the conference call setup and return to the original call.

4. After the call is connected do one of the following:
   - Click [Complete Conference] to conference the two calls together. The Endpoint Connector displays a list of parties in that conference.
   - Click [End Call] to hang-up the call and exit the conference call setup. You must click [Retrieve From Hold] to retrieve the original call.

5. To add more parties to the conference call click [icon] and repeat step 3 and step 4. Depending on your phone system, other parties can be added to the conference call for a total of four parties (including yourself).

To exit the conference call:

Click [End Call] to exit the conference call.

System Recall

A held call will automatically recall the system if it remains unanswered after a certain amount of time, as determined by the phone system. A call transfer is also treated like a held call by the system and will automatically recall the system if it goes unanswered.

To answer a recall:

Click [Answer] to answer the recall.

DND Status

Change your DND status by selecting one from the list at the top of the Endpoint Connector. The list of statuses in the Endpoint Connector, provided by the Inter-Tel phone system, are the same statuses as those available on your desktop phone. In the example shown below, the status **Available, Not Ready** appears in the list only if you are in a hunt group or log on using an agent ID.

Use the **Log Out** status, at the bottom of the list, to log off the extension without logging out of the Saleforce.com session.
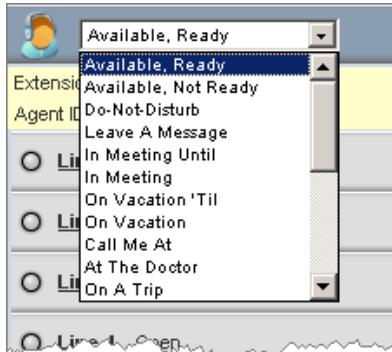
To change your status:

Click the desired status from the list. When you change status from the Endpoint Connector it is also displayed on the desktop phone.

| NOTE | You can select a status from the list but cannot add text to a status (On Vacation 'Til, Call Me At, etc.) through the Endpoint Connector. |

Associated Records

When an external call has an associated record or records in the Salesforce database, a link to the information is provided and displayed below the Caller ID in the Endpoint Connector. Click the associated record and view details of the record in the main screen, either before or after answering the call. If there are no associated records found in the Salesforce database only the Caller ID is displayed in the Endpoint Connector.

When the incoming call has an associated record (or records), one of the following occurs:

- If the incoming call has only one associated record, the record is identified in the Endpoint Connector and the main screen automatically displays details of the associated record. (This is a default setting that can be changed to not automatically display a record. For additional information, refer to "Configuring the Endpoint Connector" on page 12.)

- If the incoming call has more than one associated record, you must click the link in the Endpoint Connector to display that record in the main screen. See the following example.

In the example below, associated records were found for both **Case** and **Account**. The record **00001010** is selected and details for that case number are then displayed in the main screen.

Click link for record 00001010
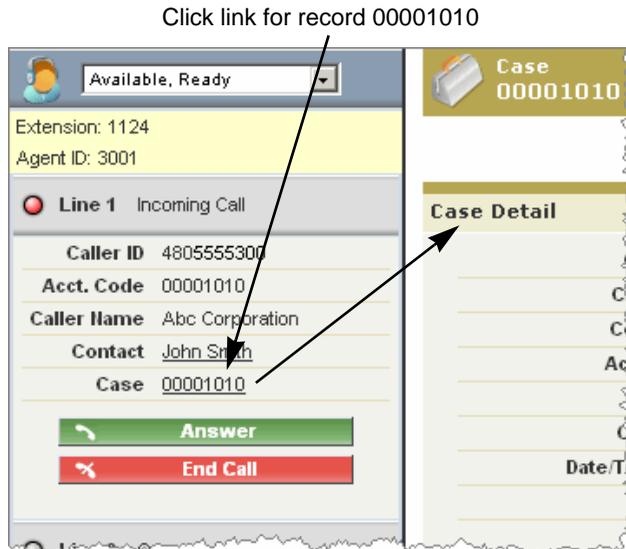
| NOTE | When you select a record for an incoming call the current call log is automatically related to that record. Refer to the following section Call Logs. |

Call Logs

Whether you receive or place an external call you have the option to enter comments about the call and create a call log. A text box is displayed at the bottom of the Endpoint Connector which is automatically saved when the call is ended. Call logs are *not* available for internal calls. Call logs can be related to an associated record when the record is displayed in the main screen. When there is more than one associated record a list is displayed in the call log that you can select from, as shown in the example on the following page.

Call logs of completed calls can be edited by clicking a link to the call in the call history area (**Last 3 Calls** and **My Calls Today**) of the Endpoint Connector. When you click the link for a call, the record appears in the main screen.

NOTE	The call log screen closes immediately after the call is ended, even if you are still typing comments at the time.

Configuring the Endpoint Connector

The Endpoint Connector allows you to change some settings after you have installed the application on your PC. Click **Setup** located at the top of the Salesforce Web page, which opens to the settings main page. To view and change your settings, go to Personal Setup – Call Center Settings – **My Softphone Settings**.

Auto Login

After you log on the first time you can set the Endpoint Connector to automatically log you in when you connect to the Salesforce Web site.

NOTE	It is recommended that you do *not* use the Auto Login feature if you regularly use a different extension number when you log on.

To set Auto Login:

1. Select the option **Automatically log in to your call center when logging into Salesforce**.

2. Click **Save** to automatically log you into the Endpoint Connector.

Display Records

You can choose whether associated records are automatically displayed on incoming calls. The default setting is to automatically open a record in the main screen if it is the only record found. To change this setting, select **Never open the record automatically**, and then click **Save**. The change will take effect the next time you log on.

Upgrading the Endpoint Connector

The upgrading section provides instructions for performing an upgrade of the Endpoint Connector software when a new version of the program is made available by Inter-Tel.

NOTE	To upgrade the Endpoint Connector program, the user must have administrator privileges on the computer.

To upgrade the Endpoint Connector:

1. Close the Salesforce browser window, if you are logged on.

2. Right-click 🌀, located in the system tray (notification) area, and then click **Exit**. (If you do not close the program at this time, you will be prompted to do so during the upgrade installation.)

3. Navigate to where the `setup.exe` is located on the server, or to the link that was provided by your System Administrator.

4. Double-click `setup.exe` to launch the install wizard.

5. Follow the instructions presented in each screen of the wizard and install the Endpoint Connector. Inter-Tel recommends that you use the default settings of the installation wizard.

6. After the installation is completed, you will need to start the Endpoint Connector program. To start the program, navigate to Start – Programs – Inter-Tel – Inter-Tel Endpoint Connector, and then click **Inter-Tel Endpoint Connector**.

    The Salesforce icon 🌀 then appears in the system tray (notification) area of your computer and will launch the Endpoint Connector automatically when logged on to the Salesforce Web site. By default, **Launch on Startup** is selected as shown in the figure to the right.

Troubleshooting

The Troubleshooting section provides information that may be helpful if it is necessary to troubleshoot the Endpoint Connector.

Error Messages

You may get an error message while attempting to dial using the Endpoint Connector. In most instances, if the call is not completed please check the number you are dialing and try again. If a problem persists, contact your System Administrator for assistance.

Error Logging

Depending on the type of error (if one occurs), a log of the error is captured on your computer. By default, logging is set to the minimal level but it can be adjusted to capture more data, if necessary. You should only change error log settings when instructed to do so by your System Administrator.

To change error logging for the Endpoint Connector:

1. Close the Salesforce browser window, if you are logged on.

2. Right-click 🌀, located in the system tray (notification) area, and then click **Exit**.

3. Restart the Endpoint Connector program. Navigate to Start – Programs – Inter-Tel – Inter-Tel Endpoint Connector, and then click **Inter-Tel Endpoint Connector**.

4. Right-click 🌀, and then select **Logging**. The Salesforce.com CTI Log Settings window opens.
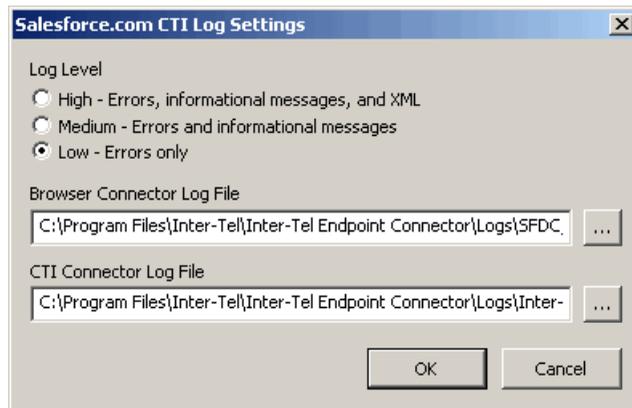
5. Select the appropriate Log Level, as instructed, and then click **OK**.