

Overview

POPP's MaX UC Desktop application integrates with 3rd party web-based applications such as:

- Customer Relationship Management (CRM) (Salesforce, SugarCRM)
- Collaboration tools (Box, Dropbox, Google Drive, OneDrive)
- Conferencing tools (WebEx)

Administrators can configure links to URLs for these applications embedded within the MaX UC application.

Note: These integrations are only available for web-based applications and do not apply to CRM and tools accessed via a local application hosted on your local network.

Define Integrations in Administrator Portal

- To enable integrations to be used by everyone in your Business Group, update the MaX UC for Desktop phone profile at the Business Group level.
- To enable the feature for a subset of people, configure and MaX UC for Desktop phone profile for each department, as necessary.

If you are uncomfortable making these changes, please contact POPP's Helpline at 763-797-7900 and they will be happy to assist.

- Using a web browser, log in to the Administrator Portal at <https://portal.popp.com/bg>
- On the left side of the screen, click [Phones].
- To change the Phone profile at the Department level, use the drop down at the top of the page to select the correct Department.
- Click the [manage your phone profiles] link

Model	MAC Address	Description	Assigned to	Department
<input type="checkbox"/>	00:04:F2:AF:69:88	00:04:F2:AF:69:88	(763) 233 7685	Sales
<input type="checkbox"/>	00:04:F2:F3:2B:3A	Poly IP5000	(763) 233 7686	Installation and ...
<input type="checkbox"/>	26:D8:8C:1D:66:BD	Self-provisioned JOHER_VoiceOpe...	(763) 233 7690	None
<input type="checkbox"/>	64:16:7F:2B:A8:EF	Showroom 1	(763) 233 7681	Sales
<input type="checkbox"/>	64:16:7F:39:76:88	VVX350	(763) 233 7681	Sales
<input type="checkbox"/>	64:16:7F:3A:7A:07	Showroom 2	(763) 233 7682	Sales
<input type="checkbox"/>	64:16:7F:44:8B:B7	Showroom 4	(763) 233 7684	Sales
<input type="checkbox"/>	64:16:7F:44:8C:2C	Showroom 2	(763) 233 7682	Sales
<input type="checkbox"/>	64:16:7F:55:00:6C	VVX150	(763) 233 7683	Installation and ...

- The Phone Configurator opens in a new window:
 - If you do not already have a MaX UC for Desktop phone profile, click the **Create new profile** button. Scroll through the list and click to select the **MaX UC for Desktop**.
 - If you already have a MaX UC for Desktop phone profile, click [Edit] to open it



Define Salesforce.com CRM Integration (or SugarCRM)

Add an integration for your company's CRM to enable end users to quickly open a client's account while on a call.

- In the MaX UC for Desktop phone profile, expand the UC Integration → CRM Service 1 section.
- Select Enabled [Yes] to enable Salesforce.com (More info below for using non-Salesforce.com CRM)
- You will now see fields where you can enter the Name that should appear on the link in MaX UC and the URL to access the service (e.g., Salesforce).
- You will see an example search URL for Salesforce in the URL field. Simply replace the text "**REPLACE_WITH_URL_ROOT_DOMAIN**" with the Salesforce domain URL used by your company.

Example: https://na6.salesforce.com/search/SearchResults?str={SEARCH_VALUE}

To find the correct Salesforce URL for your company, log in to your Salesforce.com account and you will see your company's Salesforce.com domain in the address bar.

▼ UC Integration			
▶ Enabled Services			
▼ CRM Service 1			
Enabled	<input checked="" type="radio"/> Yes <input type="radio"/> No		PP HIPPS Business Gr...
Name	<input type="text" value="Salesforce"/>		Default
URL	<input type="text" value="https://REPLACE_WITH_URL_ROOT.salesforce.com/search/SearchResults?str={SEARCH_VAL"/>		Default
▼ CRM Service 2			
Enabled	<input checked="" type="radio"/> Yes <input type="radio"/> No		PP HIPPS Business Gr...
Name	<input type="text" value="SugarCRM"/>		Default
URL	<input type="text" value="https://REPLACE_WITH_URL_ROOT?module=Home&append_wildcard=true&action=spot&full=1"/>		Default

Optional: The default URL will search Salesforce using the caller ID name. If you prefer to search Salesforce by the caller ID number, change the URL:

From:
https://na6.salesforce.com/search/SearchResults?str={SEARCH_VALUE}

To:
https://na6.salesforce.com/search/SearchResults?str={SEARCH_NUMBER_ONLY}

- Click **[Save changes]** when finished

Define Other CRM (Non- Salesforce/SugarCRM) Integration

Note: CRM integrations other than Salesforce.com and SugarCRM are not supported by POPP and you will need to work with your CRM administrator/support to configure.

Following the steps in the **Define Salesforce.com CRM Integration** section above (and modifying slightly), you can use any web-based CRM tool and MaX UC Desktop will launch a browser-based CRM search based on the caller's phone number. POPP includes integrations for Salesforce.com (Service 1) and SugarCRM (Service 2). If you wish to use a CRM other than Salesforce.com or SugarCRM, you can do so by defining your web-based CRM as Service 3, 4, or 5.

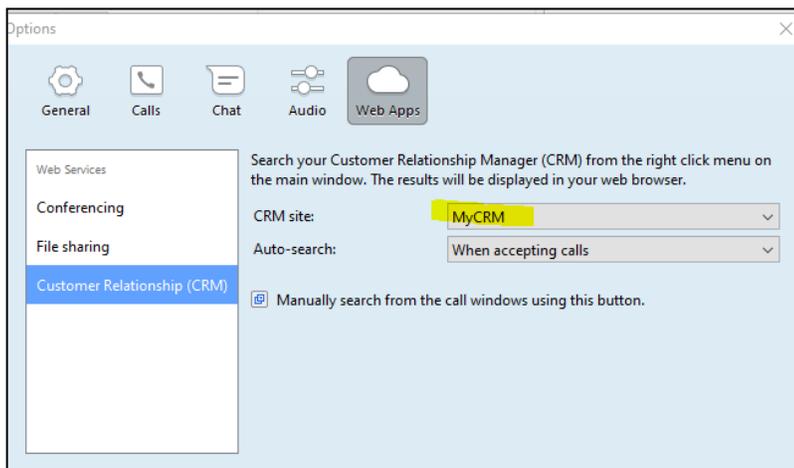
▶ CRM Service 1			
▶ CRM Service 2			
▼ CRM Service 3			
Enabled	<input checked="" type="radio"/> Yes <input type="radio"/> No		Reset
*Name	<input type="text" value="MyCRM"/>		Reset
*URL	<input type="text" value="www.myCRM.com"/>		Reset

It is important to keep in mind that MaX UC is simply launching a browser to a URL and inserting a name/number into the URL. This can work to any URL if formatted correctly per the CRM's specification. Follow the steps above in the **Define Salesforce.com CRM Integration** section but use the name and URL for your CRM application.

Example: https://myCRM.com/SearchForCustomer?str={SEARCH_VALUE}

- This section is the URL of the website you visit for your CRM.
- This section is the syntax of how to pass the CRM a search string. Work with your CRM administrator/support to determine this syntax.
- This section is the phone name/number that MaX UC Desktop will pass to the CRM in order to perform the search. As indicated above, if you wish to search by number instead of name, replace this with {SEARCH_NUMBER_ONLY}

If you define a Non-Salesforce/SugarCRM CRM service, you will need to configure the MaX UC Desktop application to select the correct CRM service. In MaX UC Desktop, go to **Tools → Options → Web Apps** and select the service you wish to use from the drop down.



Define Google as a CRM Integration

You can configure Google as a CRM integration that allows you to Google search the name or number of the caller (during a call, you will click the “Search online” button to perform the Google search). Follow the steps above in the **Define Salesforce.com CRM Integration** section, but use the name and URL for Google as follows:

To search for caller’s name: `https://www.google.com/search?q={SEARCH_VALUE}`

To search for caller’s number: `https://www.google.com/search?q={SEARCH_NUMBER_ONLY}`

Define Conferencing and Collaboration Integrations

Add integrations for collaboration or conferencing tools that your company uses to enable end users to quickly open commonly used websites while on a call.

1. In the MaX UC for Desktop phone profile, expand **UC Integrations → Conferencing Services** and/or **Collaboration Services**.

The following default services are **built in to the system**:

Conferencing:

- Service 1 - WebEx

Collaboration:

- Service 1 – Box.com
- Service 2 – Dropbox
- Service 3 – Google Drive
- Service 4 – OneDrive

2. Select Enabled [Yes] to enable the conferencing or collaboration service(s) that you use.

Optional: Define custom services by expanding any of the blank **[Cloud-hosted Service]** options, selecting Enabled [Yes], and entering a name and URL for the web site. You can also select the Window Size (small, medium, or full screen). These services can be any web sites that you access frequently. They are not required to be Conferencing or Collaboration sites. For example, if your employees frequently access ADP Payroll while on the phone, you could choose to add in ADP www.adp.com.

Cloud-hosted Service 1			
*Enabled	<input checked="" type="radio"/> Yes <input type="radio"/> No		Reset
*Name	<input type="text" value="ADP"/>		Reset
*URL	<input type="text" value="www.adp.com"/>		Reset
Window Size	<input type="text" value="Small"/>		Default

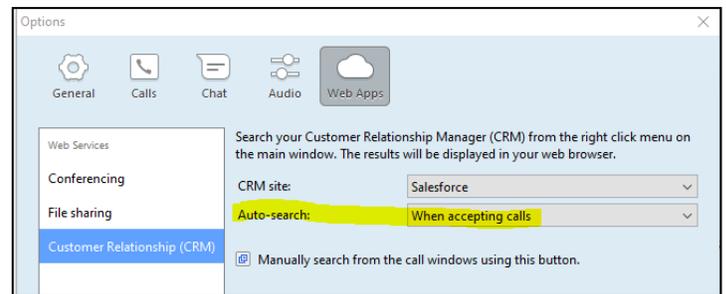
3. Click [**Save changes**] when finished.

Using CRM Integration (Example: Salesforce)

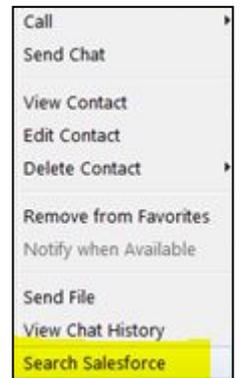
Once you have configured the MaX UC Desktop application to integrate with Salesforce.com, you will have the ability to manually or automatically look up the caller's account in Salesforce.com while using MaX UC Desktop.

Note: You must be logged in to Salesforce.com in order for this functionality to work. If you are not logged in, you may be prompted to login each time you use the integration. For best results, set Salesforce to remember your credentials and keep you logged in.

1. To Search Salesforce on Incoming Calls:
 - a. To manually look up the caller's details, click the button pictured below to open a browser and look up the caller by name or number in Salesforce.
 - b. To automatically search for the contact when you accept an inbound call: go to **Tools** → **Options** → **Web Apps** and next to Auto-search, select **When accepting calls**.



2. To lookup a MaX UC contact's details in Salesforce: Right-click on the contact and choose **Search Salesforce**. Just like for an inbound call, MaX UC will open a browser to Salesforce and search for the contact selected.



Configure Click-to-Call within Salesforce CRM

Note: In order to configure this functionality, you must be the Administrator on your Salesforce.com account and must be able to log in to the Salesforce.com account with sufficient permissions to create custom fields. POPP is not able to assist with making changes to your CRM application. The information below is provided as-is for general reference.

MaX UC Desktop provides the ability to initiate a call when a Salesforce user clicks on a link containing a telephone number on web pages or in e-mails. In order to use this functionality, the Salesforce.com Administrator must configure a custom field on Salesforce.com that adds a hyperlink to phone numbers.

MaX UC Desktop supports three protocols (sip, tel, and callto) to trigger the call.

A Click2Call Link/URL is formatted like this:

protocol: phone_number

Examples:

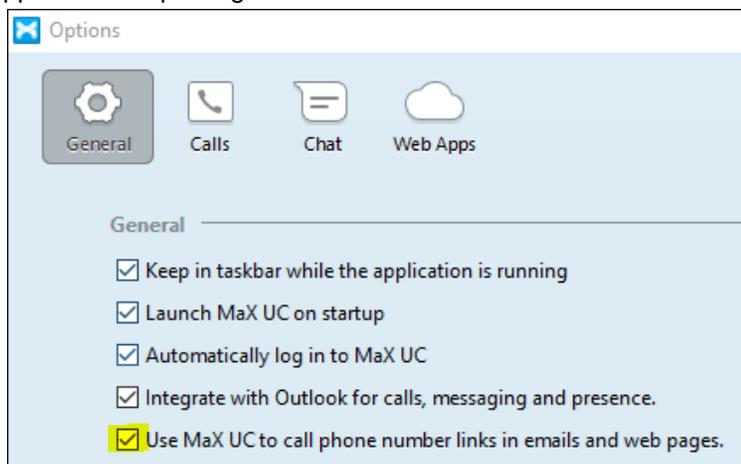
tel:8005551234

sip:7635551234

callto:7635551234

For MaX UC Desktop to start dialing when an end user clicks on a phone number hyperlink, go to **Tools → Options** and check the box for "User MaX UC to call phone numbers links in emails and web pages".

Note: Apple OSX does not natively support setting a custom application for placing calls.



Custom fields can be added to most tabs in Salesforce. This example demonstrates creating a custom field in the Contacts tab:

1. Login to Salesforce.com using an account with permissions to create custom fields.
2. Access the Salesforce.com setup page and select the option to create a custom field in the Contacts tab:
 - a. Click on **Setup** in the upper right hand corner of Salesforce.com
 - b. On the left side of the screen, go to **Build → Customize → Contacts → Fields**
 - c. Scroll to the bottom and select **Contact Custom Fields & Relationships** and click on **New**
3. The following options should be selected:
 - a. Custom Field Type: Formula
 - b. Formula Return Type: Text
 - c. Function: Hyperlink

4. Hyperlink formulas are formatted like this:

HYPERLINK(url, friendly_name)

To create the proper Click2Call URL formatting replace url with tel:, sip: or callto: followed by a phone number field.

HYPERLINK("tel:" & Phone, Phone)

For additional information on creating custom fields visit

https://help.salesforce.com/apex/HTViewHelpDoc?id=customize_customfields.htm

Once created, a custom field can be added to a contact. When this link is clicked, MaX UC will launch a call to this number.

Name	Mr. John Doe	Home Phone
Account Name	POPP.COM - TECH	Mobile
Title	Supervisor	Other Phone
Department	Sales	Fax
Birthdate		Email
Reports To	View Org Chart	Assistant
Lead Source		Asst. Phone
Click2Dial Phone	(763) 555-1234	
Mailing Address		Other Address

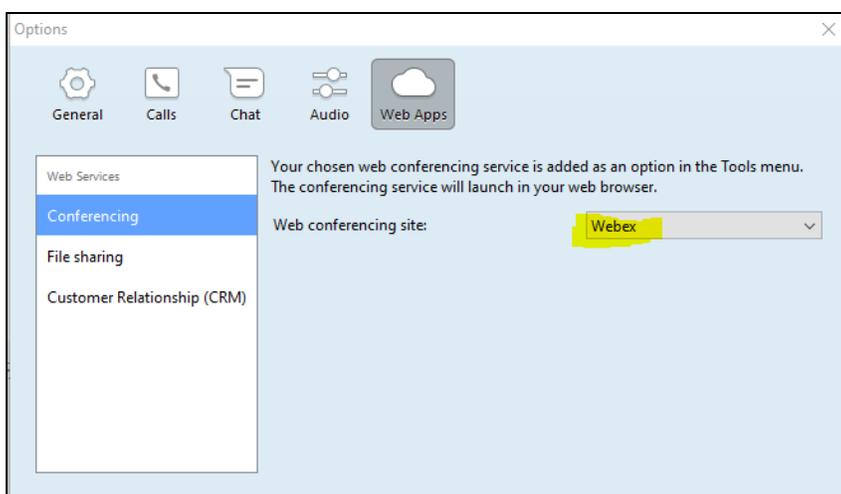
Configure Click-to-Call within Non-Salesforce CRM

Note: The instructions above are specific to Salesforce, but these capabilities can be configured with other CRM applications as well. While not officially supported by POPP, we may be able to provide general guidance for setting up these capabilities within your applications.

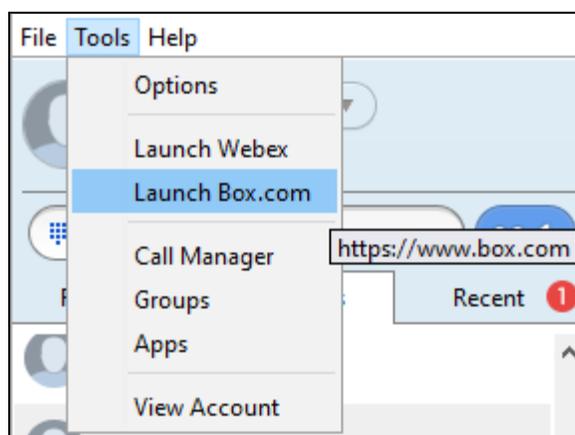
If using a CRM other than Salesforce.com, contact your CRM Administrator or CRM support to determine if similar functionality is possible and how to configure it. Reference the Salesforce-specific information in the **Click-to-Call within Salesforce CRM** section above for helpful information.

Using Collaboration and Conferencing Integrations

1. In MaX UC Desktop, go to **Tools** → **Options** → **Web Apps** and you can find the Conferencing and Collaboration applications defined earlier. Here you must choose which of these applications you would like to use.



2. Once you have defined which applications you would like to use, quick links to these applications will appear under the **Tools** menu.



3. Select the desired application to open a browser to the defined URL.

For Additional Training and Support

- Visit www.popp.com or call POPP Communications at 763-797-7900