

EarthLink Mobile Communicator enables a seamless flow of information between systems and empowers agents to provide personalized services to customers. With the help of customer information retrieved from the Salesforce.com database, agents have instant access to customer data and can validate customers real-time.

Agents can identify customers

- with information transmitted with an incoming call
- searching from call logs
- information stored in contact directory

Mobile Communicator Capabilities

- Automatically lookup customer data Salesforce.com using information received on incoming calls
- Search Salesforce.com from any call in the incoming, outgoing or missed call lists
- Search from your company directory, corporate or outlook contact lists

Create profile for Mobile Communicator for Desktop and customize CRM settings to match your Salesforce.com instance

To enable Click2Dial you will need administrator access to your Salesforce.com account

Deploy Mobile Communicator Profiles

This task assumed you are an administrator on your CommPortal Business Group. You must be able to log in to the CommPortal BG Admin interface with sufficient permissions to create and make changes to your Mobile Communicator for Desktop phone profiles. If your Business Group contains multiple departments then you can configure phone profiles at the BG scope and/or the scope of individual departments.

If you want to enable Mobile Communicator integration with Salesforce.com to be used by everyone in your Business Group, you should just make changes to the Mobile Communicator for Desktop Phone Profile at the Business Group level. If you need to enable the feature for a subset of users, you would need to configure a Mobile Communicator Desktop phone profile for each department, as necessary.

1. Using a web browser, log in to CommPortal at <http://voip.elnk.us/bg>
2. In the menu on the left hand side of the CommPortal BG Admin UI, select **Phones**.
3. If you want to change the Phone Profile at the Department level, use the drop down at the top of the page to select the correct Department.

Christian Pena EarthLink®

Phones in Department: View All

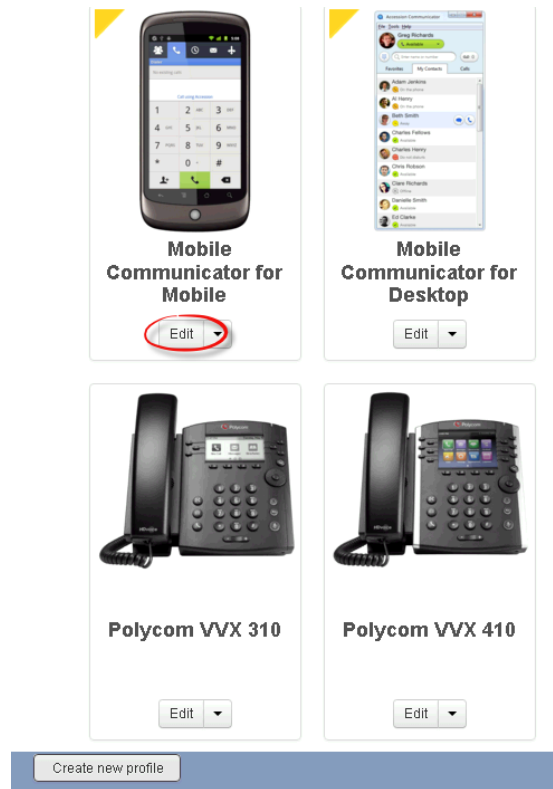
Assign phones to lines using the table below or [manage your phone profiles](#).

Model	MAC Address	Description	Assigned to	Department
<input type="checkbox"/>	00:04:F2:D3:60:DC	Polycom VVX 410	(256) 241 8081	GearHeads
<input type="checkbox"/>	00:04:F2:DD:E9:AC	Polycom VVX 600	(256) 241 8083	None
<input type="checkbox"/>	00:08:5D:2C:D4:AC	Aastra 6739i		None
<input type="checkbox"/>	00:08:5D:2C:E8:60	None	(256) 241 8081	GearHeads
<input type="checkbox"/>	00:08:5D:2D:FB:C4	Astra 57i		Sales
<input type="checkbox"/>	00:08:5D:30:91:D6	None	(256) 241 8083	None
<input type="checkbox"/>	00:08:5D:34:09:E5	Std Seat	(256) 241 8078	Technical
<input type="checkbox"/>	00:08:5D:35:B2:5F	Aastra 55i	(256) 241 8081	GearHeads
<input type="checkbox"/>	00:08:5D:36:D9:95	39	(256) 241 7370	None

--Select Department-- Assign to Department Enter number... Assign to Line

4. At the top of the screen, click the **manage phone profiles** link.
5. The CommPortal Phone Configurator opens in a new window. If you already have a Mobile Communicator profile you will see a tile for it here and should skip to #8

6. Select the **Create New Profile** option
7. From the list of phone profiles, scroll down to find and select the **Mobile (“Accession”) Communicator for Desktop** Phone Profile.
8. Click the **Edit** button at the bottom of the screen to open the Phone Profile

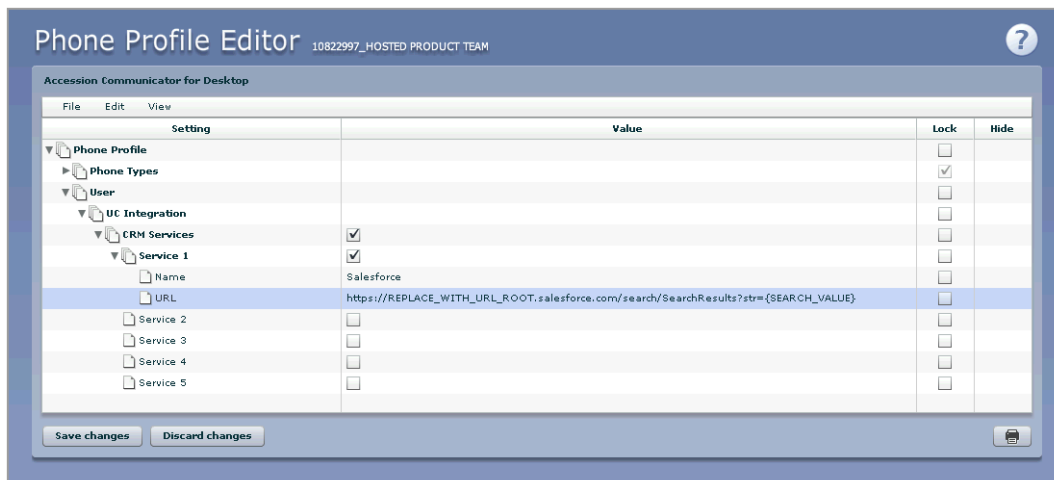


Enable or disable Salesforce.com Integration

When a Salesforce.com integration is enabled, agents can click on a button on the Incoming Call or In Call panel to access Salesforce.com and search for the caller.

1. In the Mobile Communicator for Desktop Phone Profile, expand the User, UC Integration section.
2. Tick the checkbox for CRM Service and Service 1 (Salesforce) to enable the service.
3. You will now see fields where you can enter the name that should appear on the link in Mobile Communicator and the URL to access the service.
4. You will see that there is an example search URL for Salesforce in the "Value" 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}



Tip: To find your company's URL, login to your Salesforce.com account and you will see your company's Salesforce.com domain in the address bar.

5. Click Save

Enable Click2Dial

This task assumes you are an administrator on your Salesforce.com account. You must be able to log in to the Salesforce.com account with sufficient permissions to create custom fields.

You can configure a create a custom field on Salesforce.com that attaches a hyperlink to phone numbers. Clicking the 'Click 2 Dial' link automatically places a call to that number using the Mobile Communicator for Desktop client.

Click2Dial Links

Mobile Communicator for Desktop supports three protocols (sip, tel, and callto) to trigger the call.

A Click2Call Link/URL is formatted like this:

protocol:phone_number

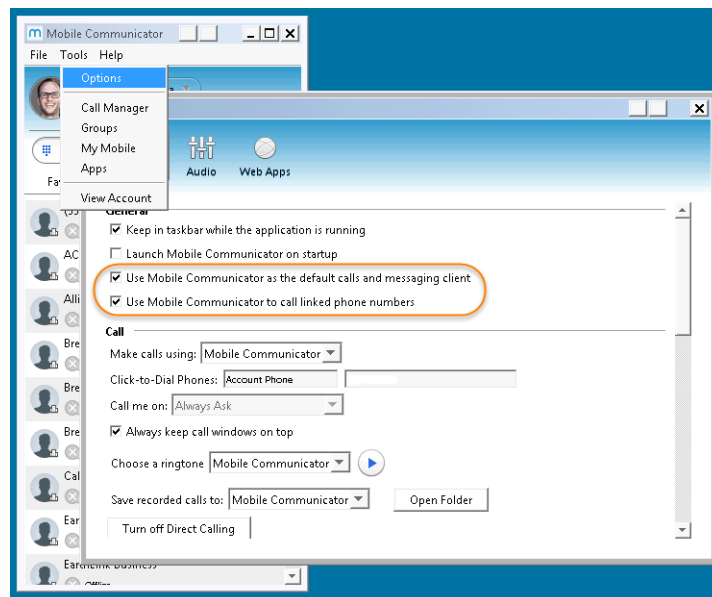
Examples:

<tel:8005551234>

<sip:2125464444>

<callto:4442305555>

For Mobile Communicator to start dialing when a user clicks such links, Mobile Communicator must be set as the default application to place calls and call linked numbers. The settings can be found in the Mobile Communicator for Desktop options. Apple OSX does not natively support setting a custom application for placing calls.



Custom Field Configuration

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.
- 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
