

ESI Salesforce.com Connector

Integrating the IP Server 900 with a leading CRM tool

Introduction

The *ESI Salesforce.com Connector* allows the **IP Server 900** business communications system's **ESI API** to connect to the popular Salesforce.com® customer relationship management (CRM) tool. This allows a business that uses Salesforce.com to make calls directly from the Salesforce.com Web interface and receive inbound screen "pops" from its Salesforce.com contact list.

To use the *ESI Salesforce.com Connector*, the PC must first have the ESI API installed. The ESI API is similar to a hardware driver, and allows *Windows* applications to communicate with the phone system. (For more information about the ESI API, see the *ESI API Feature Overview*, ESI # 0450-1353). The *ESI Salesforce.com Connector* uses the ESI API to gather incoming call information and process outgoing calls and call-handling activities. It also uses the Salesforce.com Web interface to pull dialing information for outbound calls or "pop" customer profile information for incoming calls.

The *ESI Salesforce.com Connector* allows users to dial directly from Salesforce.com via hot-key, right-click of a menu, or hyperlink. It can screen-"pop" incoming calls based on a user's contact list or lead data list. It also displays incoming and outgoing call lists, and provides a built-in phonebook that uses the user's Salesforce.com contact list to allow dialing to contacts even when the user isn't connected to Salesforce.com.

Requirements

- **ESI system** — An IP Server 900.
- **PC** — Each PC running the *ESI Salesforce.com Connector* must fulfill the following minimum requirements:
 - **Operating system** — *Windows 7, Windows Server 2008, Windows Vista, Windows XP Professional Edition, or Windows Server 2003*. As applicable to each, both 32- and 64-bit versions are supported.
 - **Processor** — Pentium® 4, 1.6 GHz or higher (32- or 64-bit).
 - **Memory** — 1 GB or more of RAM.
 - **Hard drive** — 20 GB or larger.
- **Licensing** — The *ESI Salesforce.Com Connector* requires a license for each PC on which the application runs.
- **Networking** — PCs running the *ESI Salesforce.com Connector* must have data connectivity to the IP Server 900.
- **Account** — The Salesforce.com account must have **API Integration** enabled. This requires an enterprise-level (or higher) account. For more information concerning Salesforce.com accounts, visit www.salesforce.com.

How do I get the *ESI Salesforce.com Connector*?

The ESI API and the *ESI Salesforce.com Connector* can be downloaded from the password-protected ESI Resellers' site as *Windows-executable* installers. After installation of the ESI API and the *ESI Salesforce.com Connector*, a Certified ESI Reseller must configure an installed IP Server 900 and extension information to allow interfacing of the *ESI Salesforce.com Connector* to the customer's phones. For more details about installation of the ESI API, consult the *IP Server 900 ESI API Programming Manual* (ESI # 0450-1359).

About ESI

ESI (Estech Systems, Inc.) designs and manufactures high-performance phone systems for businesses and organizations. ESI uses advanced technology to design IP and digital communications systems that integrate built-in capabilities, advanced features, and highly differentiated applications into flexible products that are easy to use and keep employees productive. ESI has sold over 250,000 business communications systems through hundreds of factory-trained Certified Resellers. Founded in 1987, ESI is a privately held corporation with headquarters in Plano, Texas.



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