

CRM Connector

Installation & Integration



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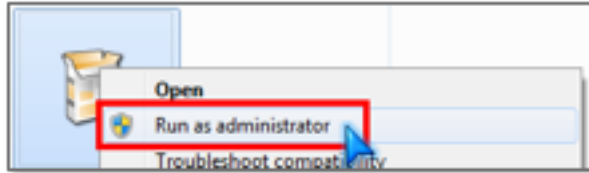
Installation

» Available for download on our web site:

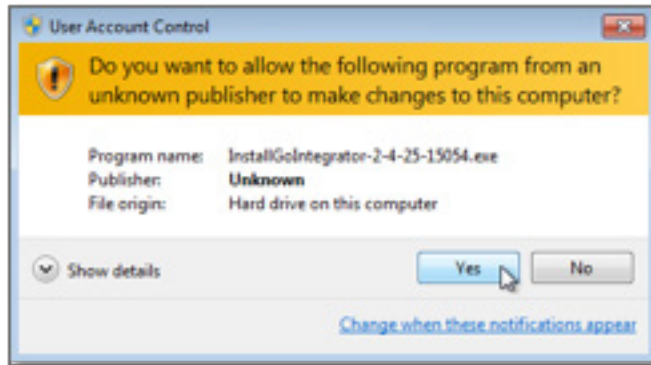
<https://momentumtelecom.com/apps/crm-connector/Momentum-CRM-Connector-Download-PC.exe>

» Quit any open programs

» Right Click on the CRM Connector Installer and select **Run as Administrator**



Click **Yes** to User Account Control, if applicable



Click **Install**



» You will see a Grey Circle icon running in the Windows task bar

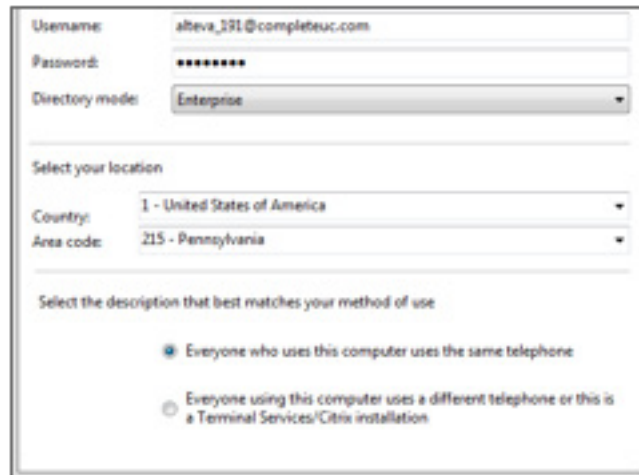


INSTALLATION

Right-click on the Grey Circle icon and Select **Configuration**

» Under the **Telephony** section, enter complete the following information:

- » Username: Enter your **Vexus Voice User ID**
- » Password: Enter your **password**
- » Directory Mode: choose **Group** or **Enterprise**. By default it is set to Group. This controls the directory numbers you download from the telephone system.
- » Verify the country setting and your area code for recognition of local numbers.
- » Method of use: this is useful when several people share the same PC.

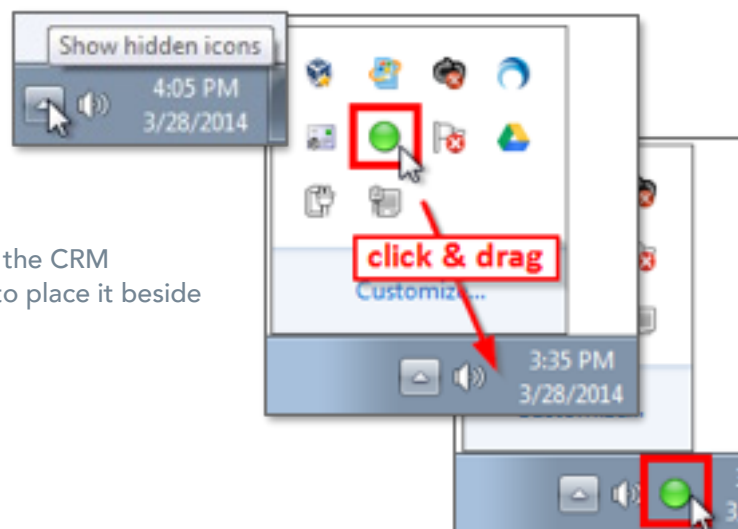


SYSTEM TRAY ICON

When you install the Vexus CRM Integrator a colored circle icon will be displayed in your system tray at the lower right of your screen. By default, it will be placed in the hidden icons section of the system tray. For optimal use, you should move it so that the icon is always in view.

» Click the up arrow to reveal hidden icons

» Click on and drag the CRM Connector's icon to place it beside the system clock.



Salesforce.com Integration

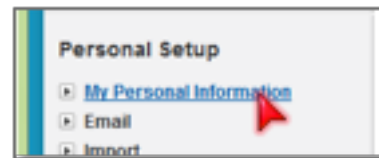
SALESFORCE SECURITY TOKEN

- » Salesforce CRM uses an additional security measure called a security token which needs to be added to the end of your password used in the integration setup. For example, if your password is "mypassword" and your security token is "XYZ123", you should type "mypasswordXYZ123" into the Password box.

- » If you're not sure what your security token is, you can easily reset it by logging into your Salesforce CRM account and then going into your account **Setup** page by clicking the option near the top-right corner under your name.



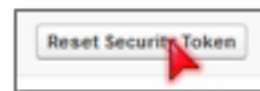
- » Under Personal Setup, click **My Personal Information**



- » Click **Reset your security token**



- » Click **Reset Security Token**



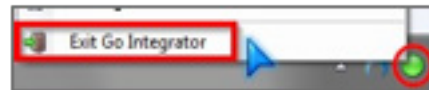
- » Your new security token will be sent to your registered email address and that's all there is to do in Salesforce CRM itself.
- » From the Salesforce.com security token confirmation email - copy your security token

Note: Whenever your password is reset, your security token is also reset.

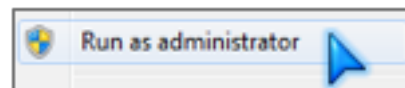
CONFIGURATION

Configuring any integration with the CRM Connector (Salesforce, Outlook, etc.) requires the program to be “Run as Administrator” for the setup of the integration. This ensures that the CRM Connector saves integration settings appropriately. Since the initial installation is “Run as Administrator,” it is usually best to complete all integrations during that time.

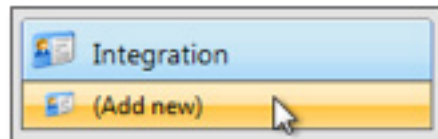
If the CRM Connector installation has already been run. Right-click on its icon and Exit.



- » Open the CRM Connector: click on the Start menu, type “Go Integrator” and Right- click and select **Run as Administrator**



- » Right-click CRM Connector’s system tray icon and then select **Configuration**.
- » Under the Integration section, click (Add new)



- » Select Salesforce CRM from the Type dropdown box.

Configuration

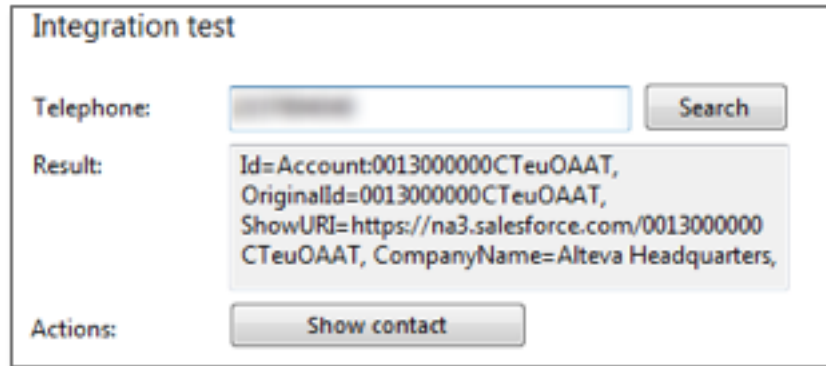
Username:
Password:

Objects:
☒ Accounts
☒ Contacts
☒ Leads

- » Enter your Salesforce CRM account login information
- » For your password, type your **password** and then paste in your Salesforce.com **security token** directly after it (no space)

TESTING

- » To test if the configuration worked, enter a known phone number from your Salesforce CRM account and click the Search button. The results will be displayed after a few seconds.



The screenshot shows a web interface titled "Integration test". It contains a "Telephone:" label followed by a text input field and a "Search" button. Below this, the "Result:" label is followed by a text area displaying the following information: "Id=Account:0013000000CTeuOAAT, OriginalId=0013000000CTeuOAAT, ShowURI=https://na3.salesforce.com/0013000000CTeuOAAT, CompanyName=Alteva Headquarters,". At the bottom, the "Actions:" label is followed by a "Show contact" button.

- » If you see an error in the Result, check your credentials:
 - » Your Salesforce.com username and password & security token
 - » Confirm your Vexus Voice User ID and password

SYSTEM REQUIREMENTS

PC Client	
Operating Systems	Hardware Requirements
Windows Server 2008 and Windows Server 2012	1.8 GHz Pentium-class processor
Windows Vista	SVGA display
Windows 7 Professional	2GB Memory
Windows 8 (Desktop mode)	1GB free hard drive space
Windows 10	Network adapter connected to a TCP/IP network
32 bit and 64 bit	Keyboard and mouse

Mac Client	
Operating Systems	Hardware Requirements
OSX Version 10.7: Lion	Mac with an Intel processor
OSX Version 10.8: Mountain Lion	SVGA display
OSX Version 10.9: Mavericks	1GB Memory
OSX Version 10.10: Yosemite	1GB free hard drive space
OSX Version 10.11: El Capitan	Network adapter connected to a TCP/IP network
Mac with 64bit processor	Keyboard and mouse

OTHER REQUIREMENTS

- » Vexus Voice Service for the User.
- » The user has an authorized license with Vexus for the CRM Connector service.
- » The Application version is the Vexus Branded.
- » Salesforce Integration requires an Enterprise or better type of account.

