

V E L A R O

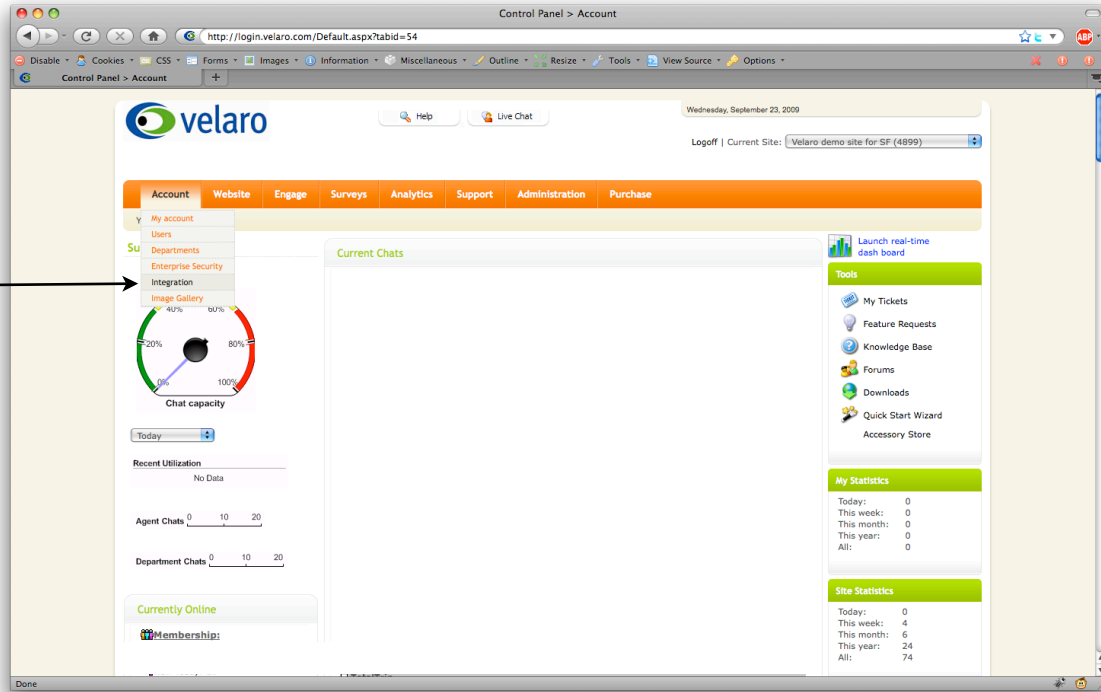
SALESFORCE.COM INTEGRATION



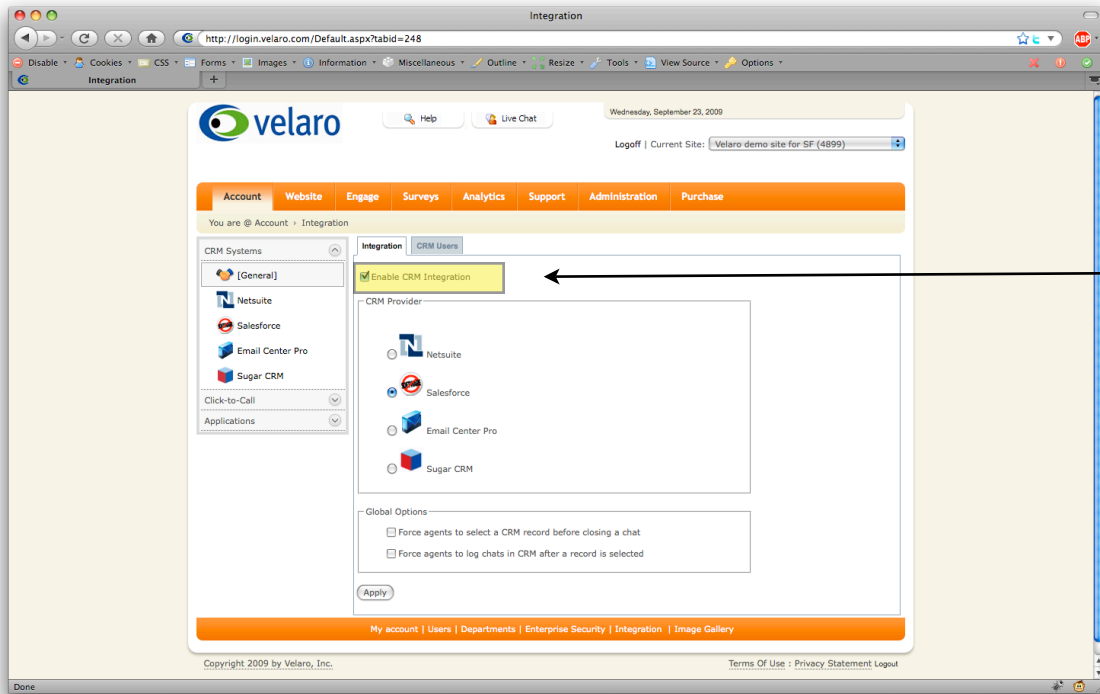
Integrating Velaro with Salesforce.com

Velaro, Inc. allows you to quickly integrate your Salesforce.com account inside of the Velaro application. To do this just follow the steps below.

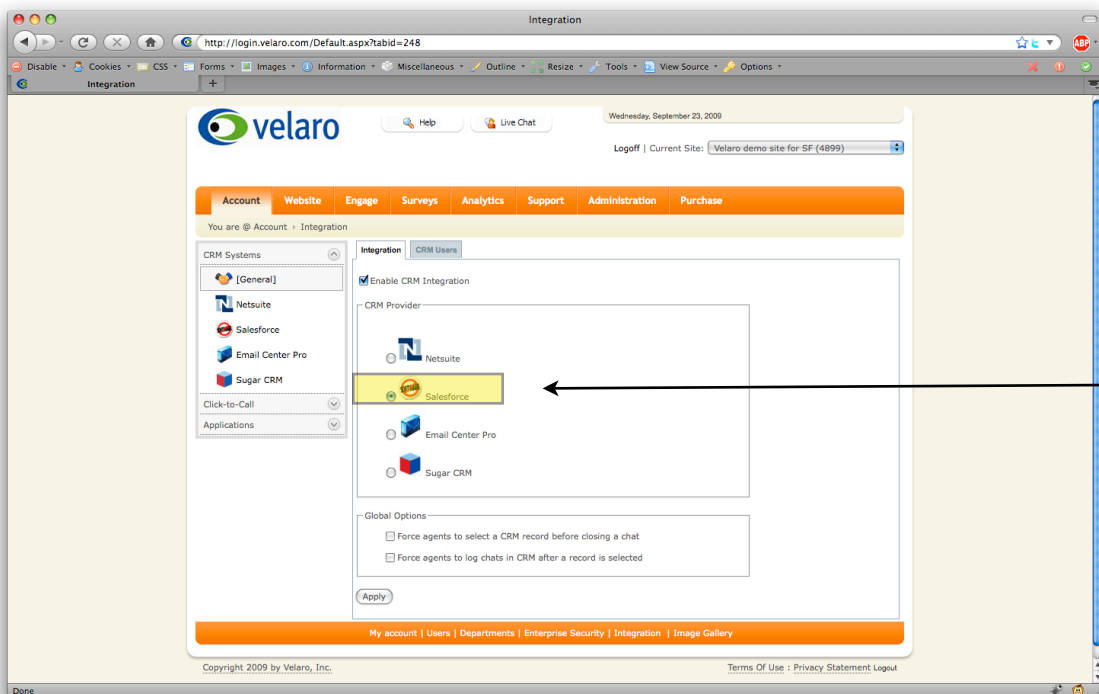
1. From the main menu, select: Account > Integration



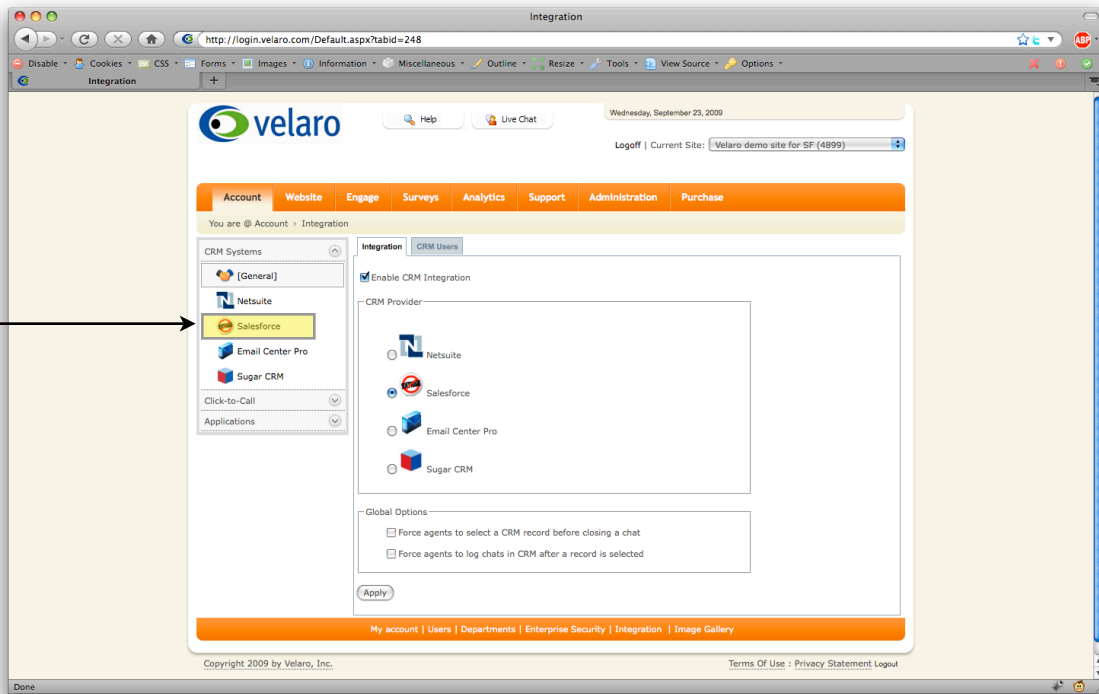
2. Select the Enable CRM Integration checkbox



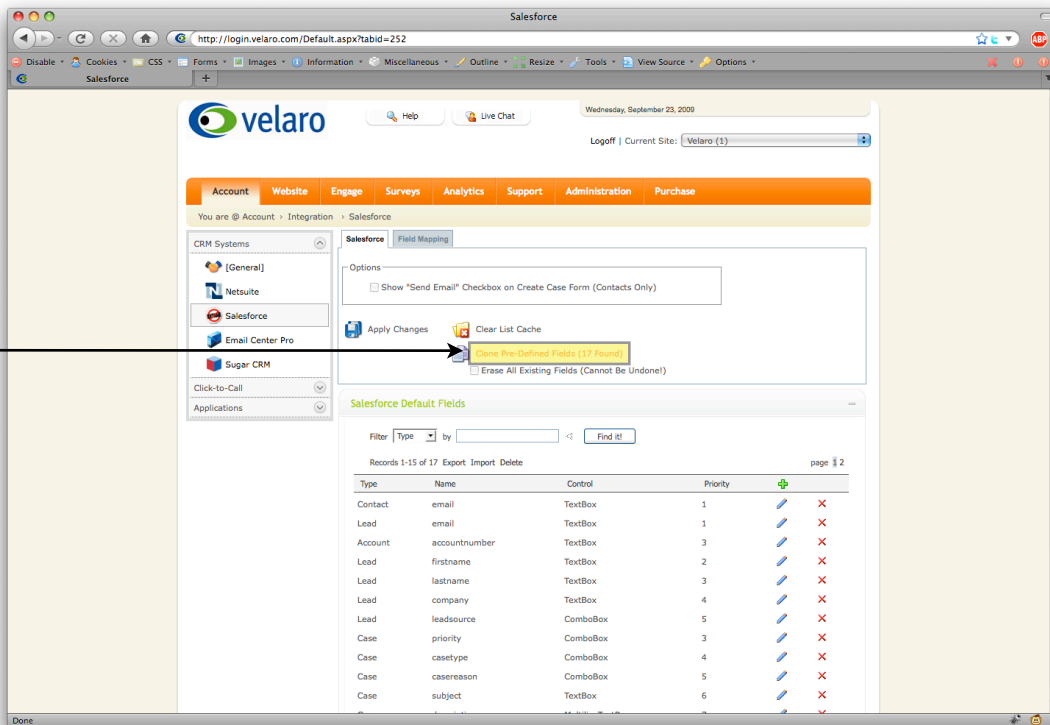
3. Select Salesforce.com from the CRM Provider list, hit Apply. In Global Options you also have the ability to force agents to select a CRM record before closing the chat, and force agents to log chats in CRM after a record is selected.



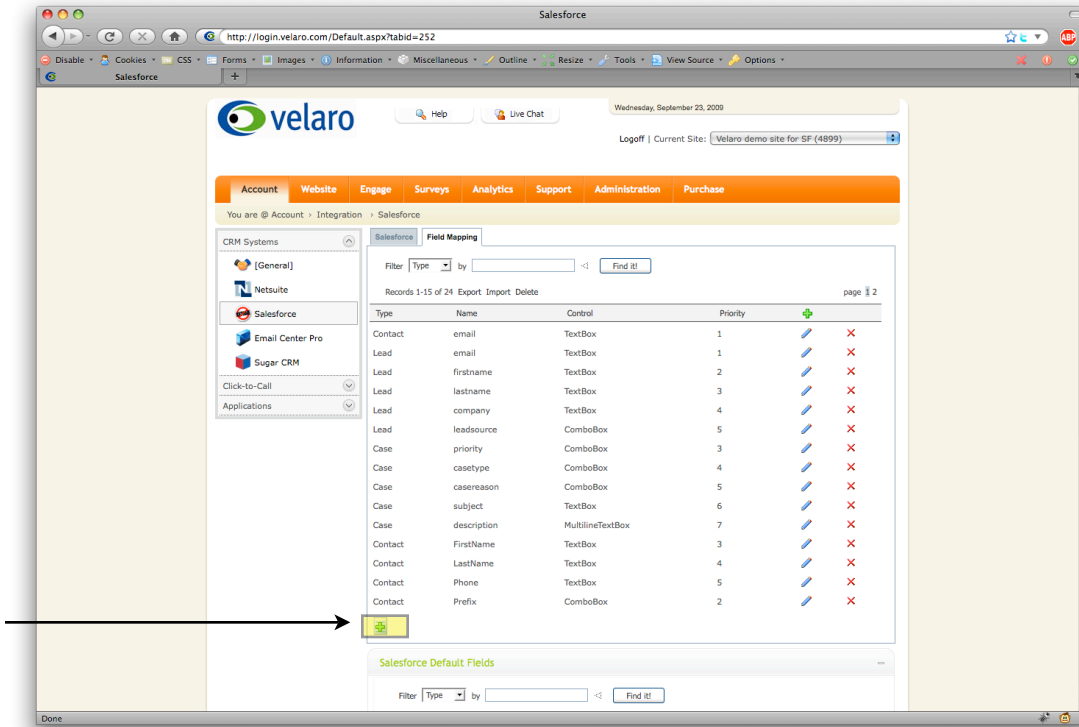
4. In the CRM Systems box on the left, select Salesforce.com



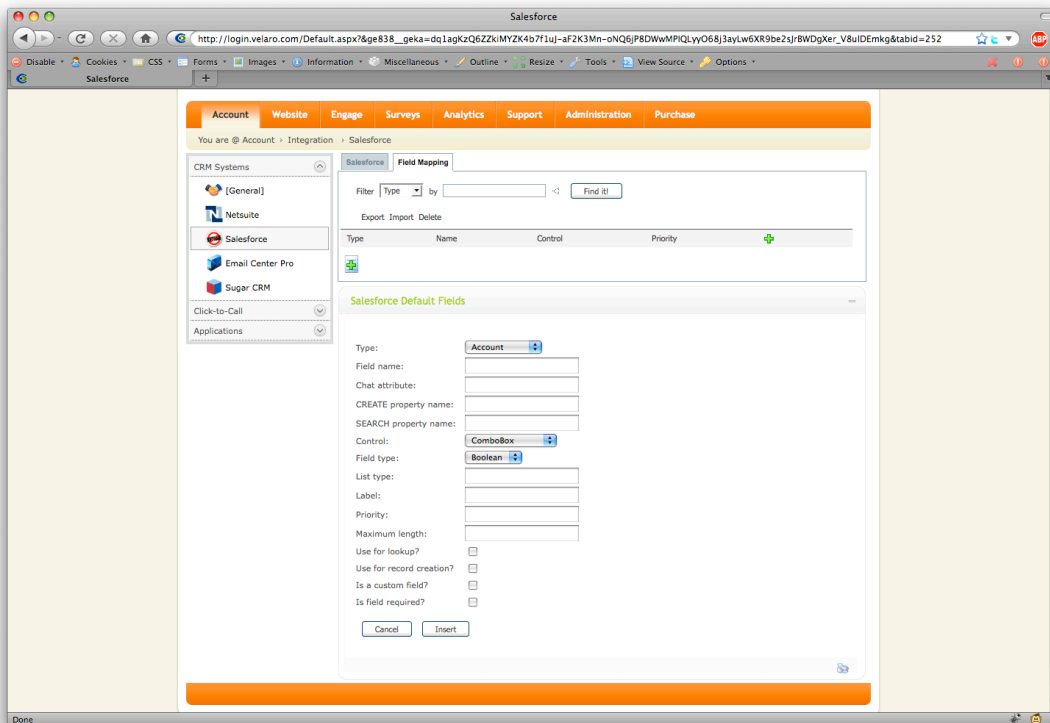
5. In the Salesforce.com set up window, click: Clone Pre-Defined Fields



6. Field Mapping: If you need to set up custom fields you can do so by click the Field Mapping tab



To map custom fields you will need to know the Field Name inside of Salesforce.com. You simply create a new field and enter the name exactly as it appears in SalesForce.com.



7. Salesforce.com

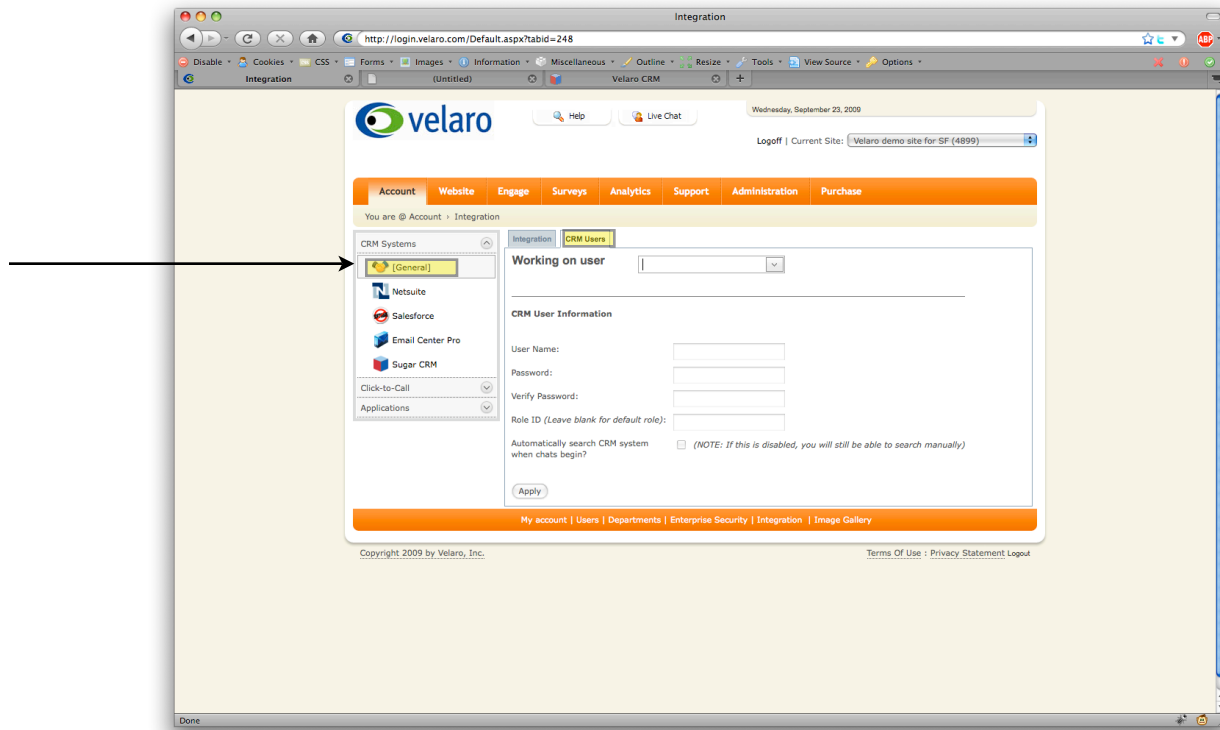
To map custom fields, you will need to know the field name as defined in Salesforce.com. To find this, click Setup at the top of the page. Under the App Setup menu on the left, expand "Customize", then the record type you are looking for (in this case Leads). Click the "Fields" item. At the bottom in the "Custom Field & Relationships" box, select the field you are looking to map. Copy and paste or note the "API Name" on this screen. Go back to the Velaro Control Panel and create a new field. Enter the API Name in the "CREATE property name" and/or "SEARCH property name" boxes, depending on how you are using this field. Check "Is a custom field?" and setup the rest of the boxes accordingly.

The screenshot displays the Salesforce CRM interface. At the top, the navigation bar includes 'Setup', 'System Log', 'Help', and 'Logout'. The user is logged in as 'Sales'. The left sidebar shows the 'App Setup' menu, with 'Leads' expanded to show 'Fields'. The main content area is titled 'Lead Custom Field Promo_Code'. It includes a 'Back to Lead Fields' link and a 'Validation Rules' link. Below this is the 'Custom Field Definition Detail' section, which is divided into three tabs: 'Field Information', 'Set Field-Level Security', and 'View Field Accessibility'. The 'Field Information' tab is active and shows the following details:

Field Information			
Field Label	Promo_Code	Object Name	Lead
Field Name	Promo_Code	Data Type	Long Text Area
API Name	Promo_Code__c		
Description	Promo code test		
Help Text			
Created By	Bill Stutz, 11/6/2008 10:34 AM	Modified By	Bill Stutz, 11/12/2008 8:23 AM

Below the field information is the 'General Options' section, which includes a 'Default Value' field. Underneath is the 'Long Text Area Options' section, showing '# Visible Lines' set to 6 and 'Length' set to 32,000. At the bottom of the page, there is a 'Validation Rules' section with a 'New' button and a message stating 'No validation rules defined.' Below this, there is a link to 'Back To Top' and a note: 'Always show me fewer / more records per related list'.

8. Add Agent login information into Velaro



From the General link select CRM Users

9. In the Salesforce.com User Information Area enter the Salesforce.com username and password for the agent. **Note: You MUST add the Salesforce.com Security Token to the end of the Agent's password.** Click Save.

