



Salesforce.com-Angel.com API

A guide to building voice applications that interact with Salesforce.com

Table of Contents

Introduction	3
Requirements.....	3
Angel.com Requirements	3
Salesforce.com Requirements	3
Voice Site Template	4
Variables.....	4
Initializations	5
Transaction Pages.....	5
Logging into a Salesforce.com account	5
Logging a new case	7
Getting the status of a case	8
Closing a case.....	8
Updating a case	9
Checking a Contact	9

Introduction

This document provides step-by-step instructions on how to enable an Angel.com voice site to communicate and interact with a Salesforce.com account.

Salesforce.com clients with a help-desk can benefit from a solution that automates support actions, enabling them to off-lead easily automatable tasks and freeing up their agents to focus on more complex customer requests.

The document focuses on Service and Support functions and details how Salesforce.com cases can be created, checked, updated, and closed, and how information about a Salesforce.com contact can be retrieved in real time.

This means you can now build voice applications that can interact with a Salesforce.com account and log new cases, check the status of cases, update and closes cases, and retrieve a contact's information, all in real-time during calls.

If you have support questions or would like to propose new functionality to this API guide, call us at 1-888-MY-ANGEL (888-692-6435), email us at: support@angel.com, or submit a ticket through the Angel.com web site.

Requirements

Angel.com Requirements

The solution described in this document makes use of Transaction Pages¹ and therefore requires a Professional or Enterprise Angel.com account². If you do not have a Professional or Enterprise account, please contact your Angel.com sales representative for help.³

Salesforce.com Requirements

The solution described in this document makes use of Salesforce.com's SForce⁴ API and therefore requires an Enterprise or a Developer Salesforce.com account.

If you do not have an Enterprise Salesforce.com account, please contact your Salesforce.com sales representative for help.

¹ See: <http://www.angel.com/ivr/university/app6.jsp> and <http://www.angel.com/ivr/university/app2.jsp>

² See: <http://www.angel.com/smallbiz/tollFree.jsp>

³ Call 888-692-6435 and say, "Sales".

⁴ See: <http://www.salesforce.com/developer/>

Developer accounts are available for free from Salesforce.com at:

- <http://www.salesforce.com/developer/orderEntry/signup.jsp>

The solution described here interacts with the following standard Salesforce.com objects:

- Case
- Contact

No custom objects are required. Moreover, only the standard fields within those objects are used in this solution. No custom fields are required.

Voice Site Template

A voice site containing all voice pages and voice site variables needed to deploy the solution can be easily copied into your account. Here are the steps:

1. Log into your Angel.com account.
2. Copy the following URL into your browser's Address text box and hit return:
<http://www.angel.com/SiteCopier?command=copySite&deleteDomainTag=69203>
3. After a few seconds, you will see a new voice site added to your account. The voice site's name is, "Salesforce.com - Functions Library".

The voice site has no Voice User Interface (VUI)⁵. It is just a shell with copies of the transaction pages described below.

Variables

The following voice site variables⁶ are used in this application:

CaseDescription	Will contain the URL to the Angel.com hosted audio file containing an audio recording of the case description
CaseID	The Salesforce.com case ID.
ClientID	The Salesforce.com ClientID.
DateCaseClosed	Date case was closed.
OpenStatus	The status of a case.
PhoneNumber	The contact's phone number.
ResolutionDescription	Description of the case resolution.
SalesforcePassword	The Salesforce.com account's password.
SalesforceUsername	The Salesforce.com account's username.

⁵ For more on Voice User Interface design, go to: <http://www.vuiview.com>

⁶ See: <http://www.angel.com/ivr/university/app11.jsp> and <http://www.angel.com/newsletter/7-05/devCorner.jsp>

Initializations

The voice site contains a Logic Page⁷ called “Initialize Setting” (page 10) that serves to initialize some variables used in the application.

The variables initialized are your Salesforce.com account login credentials:

- SalesforceUsername
- SalesforcePassword

Transaction Pages

This section describes in detail all the transaction pages provided in the template voice site.

Logging into a Salesforce.com account

Variables

URL	http://angel.initsoft.com/postlogin.php
Username	The Salesforce.com username login
Password	The Salesforce.com password login
failPage	The voice page number of the page the call flow will go to if the login fails
nextPage	The voice page number of the page the call flow will go to if the login succeeds

Interpret HTTP Response As: AngelXML

Server-side Response

Server-side responses are returned in AngelXML. For more on the AngeXML markup language, see the Transaction Page guides⁸.

The AngelXML below instructs the system to simply proceed to the next Voice Page with page number “nextPage”.

```
<ANGELXML>
  <MESSAGE>
    <PLAY>
      <PROMPT type="text">.</PROMPT>
    </PLAY>
    <GOTO destination="/<%=nextPage%>"9 />
  </MESSAGE>
</ANGELXML>
```

⁷ See: <http://www.angel.com/newsletter/3-05/datalogicpages.jsp>

⁸ See: <http://www.angel.com/ivriversity/app6.jsp> and <http://www.angel.com/ivriversity/app2.jsp>

⁹ <%=nextPage%> means that the value of variable “nextPage” will be inserted in the AngelXML returned, as shown.

Logging a new case

Variables

URL	http://angel.initsoft.com/addnewcase.php
PhoneNumber	The phone number of the contact for whom the case will be logged.
CaseDescription	The url to the sound file containing the recording to the case description.
nextPage	The next page in the call flow after the case has been logged.

Interpret HTTP Response As: AngelXML

Server-side Response

```
<ANGELXML>
  <VARIABLES>
    <VAR name="CaseID" value="<%=CaseID%>" />
  </VARIABLES>
  <MESSAGE>
    <PLAY>
      <PROMPT type="text">.</PROMPT>
    </PLAY>
    <GOTO destination="<%=nextPage%>" />
  </MESSAGE>
</ANGELXML>
```

Getting the status of a case

Variables

URL	URL: http://angel.initsoft.com/getcasestatus.php
ClientID	ClientID: The Client ID of the contact associated with the case.
CaseID	CaseID: The Case ID to lookup.
nextPage	nextPage: The next page in the call flow after the case status has been retrieved.

Interpret HTTP Response As: AngelXML

Server-side Response

```
<ANGELXML>
  <VARIABLES>
    <VAR name="OpenStatus" value="<%= OpenStatus%>"/>
    <VAR name="Description" value="<%= Description%>"/>
    <VAR name="DateCaseClosed" value="<%= DateCaseClosed%>"/>
    <VAR name="ResolutionDescription" value="<%= ResolutionDescription%>"/>
  </VARIABLES>
  <MESSAGE>
    <PLAY>
      <PROMPT type="text">.</PROMPT>
    </PLAY>
    <GOTO destination="<%=nextPage%>" />
  </MESSAGE>
</ANGELXML>
```

Closing a case

Variables

URL	http://angel.initsoft.com/closecase.php
CaseID	The Case ID to lookup.
nextPage	The next page in the call flow after the case status has been retrieved.
ResolutionDescription	The URL to the case description sound file.

Interpret HTTP Response As: AngelXML

Server-side Response

```
<ANGELXML>
  <MESSAGE>
    <PLAY>
      <PROMPT type="text">.</PROMPT>
    </PLAY>
    <GOTO destination="<%=nextPage%>" />
  </MESSAGE>
</ANGELXML>
```

Updating a case

Variables

URL	http://angel.initsoft.com/updatecase.php
CaseID	The Case ID to lookup.
nextPage	The next page in the call flow after the case status has been retrieved.
UpdateCaseDescription	The URL to the case description update sound file.
ClientID	The Client ID of the contact associated with the case.

Interpret HTTP Response As: AngelXML

Server-side Response

```
<ANGELXML>
  <MESSAGE>
    <PLAY>
      <PROMPT type="text">.</PROMPT>
    </PLAY>
    <GOTO destination="/<%=nextPage%>" />
  </MESSAGE>
</ANGELXML>
```

Checking a Contact

Variables

URL	http://angel.initsoft.com/checkifclientexists.php
PhoneNumber	The phone number to use to look up a contact.
nextPage	The next page in the call flow after contact information has been has been retrieved.

Interpret HTTP Response As: AngelXML

Server-side Response

```
<ANGELXML>
  <VARIABLES>
    <VAR name="TotalContacts" value="<%= TotalContacts%>" />
    <VAR name="ClientID" value="<%= ClientID%>" />
    <VAR name="ClientFirstName" value="<%=ClientFirstName%>" />
    <VAR name="ClientLastName" value="<%=ClientLastName%>" />
  </VARIABLES>
  <MESSAGE>
    <PLAY><PROMPT type="text">.</PROMPT></PLAY>
    <GOTO destination="/<%=nextPage%>" />
  </MESSAGE>
</ANGELXML>
```