

Customization & Enhancement Guide

Table of Contents

Using This Document

This document provides instructions on how to customize a **ReachByFone** application to connect it with an Angel.com IVR account.

Suggested Customizations & Enhancements

Page

1. Create a free Angel.com trial account	2
2. Create Custom User Fields	3
3. Enter values into custom fields	4
4. Enter Salesforce account information into Angel.com	5

1. Create a free Angel.com trial account

What: **Create a free Angel.com trial account**

Why: To create the Angel.com IVR survey application that will interact with **ReachByFone**.

How: Contact an Angel.com Representative:

- Call: **1-888-MY-ANGEL (888-692-6435)** and say, "**ReachByFone**", or
- Email: sales@angel.com
- Request an Angel.com account for the **ReachByFone** solution.
- A solution specialist will create an account for you and will email you the following information:
 - **ANGEL_EMAIL**
 - **ANGEL_PIN**
 - **ANGEL_PHONE_RBF**
 - **ANGEL_SITE_RBF**

2. Create Custom User Fields

What: **Create custom user fields**

Why: Enable the asynchronous connection between salesforce.com and the Angel.com IVR account that will run the IVR portion of the **ReachByFone** solution. This will allow you to access your Angel.com from the "Voice Site" tab.

How: Add Custom User Fields:

The user fields object is modified by going to: **Setup -> App Setup -> Users -> Fields**

Create the following custom fields:

Attribute	Data Type
ANGEL_EMAIL	Text(100)
ANGEL_PIN	Text(4)
ANGEL_PHONE_RBF	Text(20)
ANGEL_SITE_RBF	Text(10)

3. Enter values into custom fields

What: Enter values obtained from step 1 into fields created in step 2

Why: This will establish connections between your **ReachByFone** application and your Angel.com account, allowing you to access your Angel.com account from the "Voice Site" tab.

How: Enter Personal Information:
 Personal Information can be modified by going to: **Setup -> Personal Information -> "Edit"**

Enter values obtained from Step 2. above for the following custom fields:

Attribute
ANGEL_EMAIL
ANGEL_PIN
ANGEL_PHONE_RBF
ANGEL_SITE_RBF

4. Enter Salesforce.com account information into Angel.com

What: Enter Salesforce.com Authentication information into Angel.com

Why: For **ReachByFone** to work correctly with Angel.com, you will need to supply your Salesforce.com login information to the Angel.com interface that links your Salesforce.com account with your Angel.com Account. This will enable the IVR application to dynamically interact with the Salesforce.com account containing the **ReachByFone** solution. **Note that all Salesforce.com information will be securely protected within your Angel.com account and accessible only by you.**

How:

1. Click on the "Voice Site" tab
2. Click on the "Initialize Settings" link (Voice page 1) inside the Voice Site window
3. Enter your Salesforce.com email address and password
4. Hit: "Save"

You are now fully configured and ready to use **ReachByFone**.

NOTE to Internet Explorer users: to enable real-time interaction between Salesforce.com and Angel.com, you need to ensure that your browser accepts third-party cookies. Go to: **Tools -> Internet Options -> Privacy -> Advanced** and check "accept" for "Third-party cookies".