



## QUICK USER GUIDE

# DOWNLOAD & SET UP ALLCLOUD INTEGRATOR

This Quick Guide shows you how to download and set up the AllCloud Integrator client to integrate with Microsoft Outlook and Salesforce CRM.

### 1. Download the AllCloud Integrator client.

1. Download the file from <https://www.alliedtelecom.net/resources/allcloud-integrator-resources/>
2. Follow the steps in the setup wizard to execute installation.



### 2. Access AllCloud Integrator set up.

1. Once the download is complete, you will see the AllCloud Integrator status dot in the system tray of your taskbar in the lower right-hand corner.
2. Select the **Up Arrow** icon to view the status dot. It should be greyed out at this time.

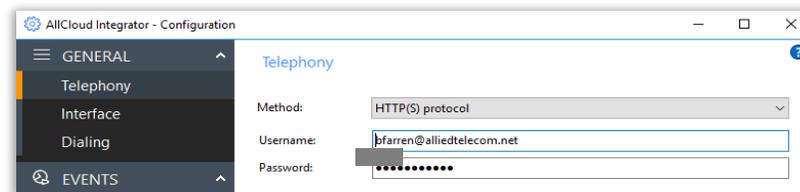


3. Right click on the status dot and select **Configuration**.



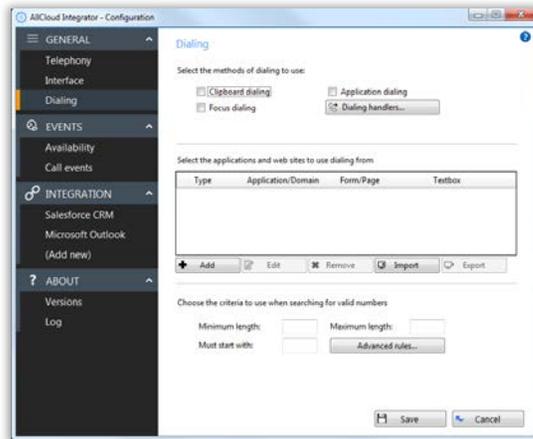
*PLEASE NOTE: once logged in, the AllCloud Integrator application window may minimize again. If so, please refer to the same steps at left to retrieve the AllCloud integrator configuration window from the task bar and select configuration to proceed to the next step.*

4. Under **General**, select **Telephony**.
5. Select **Method** and choose **HTTP(S) Protocol**.
6. Enter your AllCloud Connection Web Portal credentials in the **Username** and **Password**.

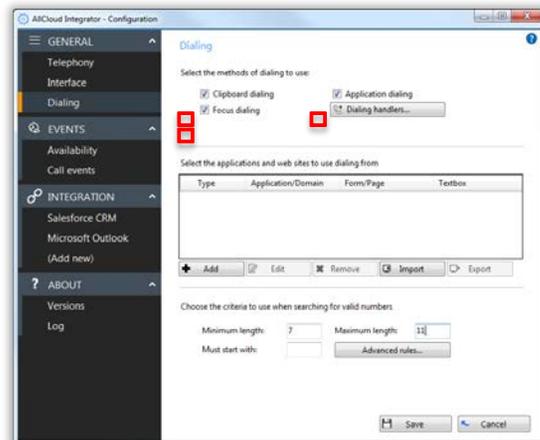


### 3. Set up dialing.

1. Under General, select **Dialing**. This page allows you to turn dialing on and off from all the types of applications that the software supports.



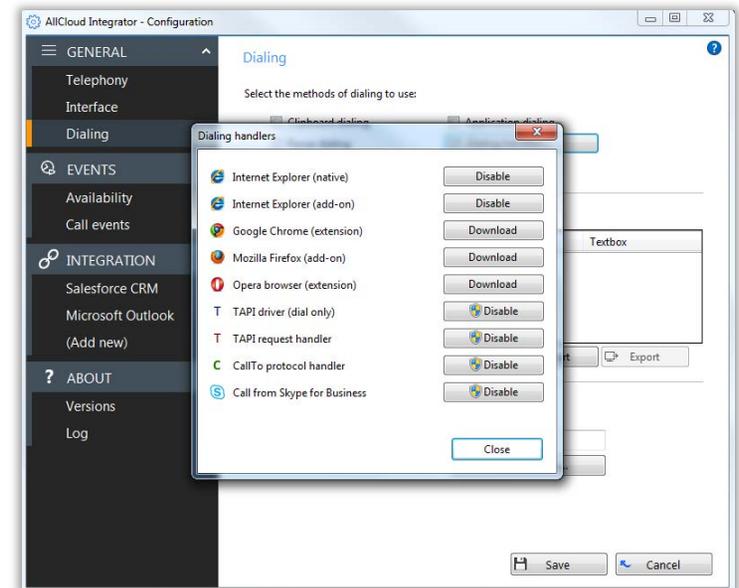
2. Check **Clipboard Dialing**, **Focus Dialing**, and **Application Dialing**.
3. Change **Minimum Length** to "7" and change **Maximum Length** to "11".



4. Click **Save**.

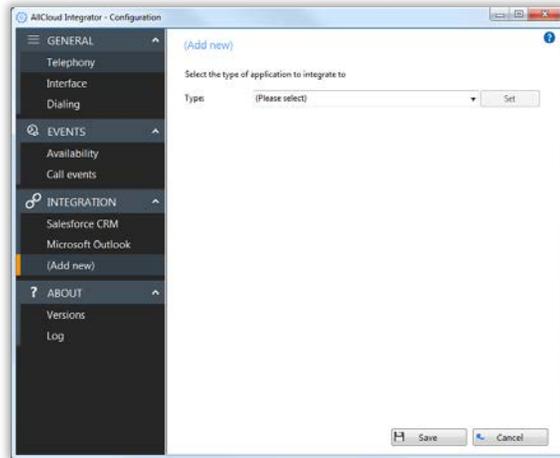
### 4. Set up the dialing handler.

1. Under **General**, select **Dialing**. Then select **Dialing Handlers**.
2. Enable the dialing drivers for the browser you are using by selecting the download button for your appropriate browser and then install any **Add On's** your browser requests for this process.
3. Enable **TAPI Driver**.
4. Enable **TAPI Request Handler**.
5. Enable **Call to Protocol Handler**.

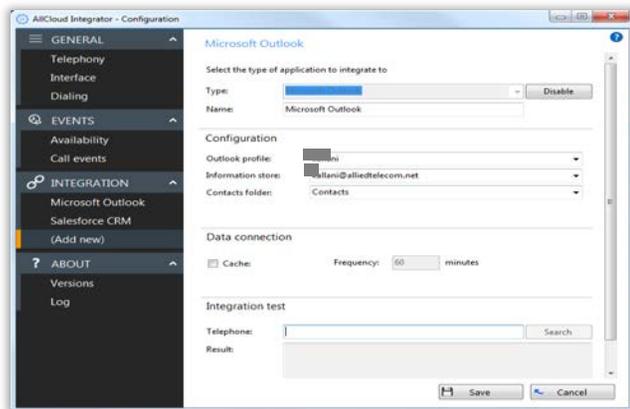


### 5. Add Microsoft Outlook as an integration.

1. Under **Integration**, select **Add New**.
2. Select the application type of Microsoft Outlook and click **Set**.



3. Under **Configuration**, select your profile under **Outlook Profile**. Under **Information Store**, select your e-mail address, and set **Contact Folder** to **Contacts**.



4. Click **Save**.

### 6. Add Salesforce as an integration.

*It is highly recommended that you use your Salesforce security token in addition to your Salesforce password when setting up this integration.*

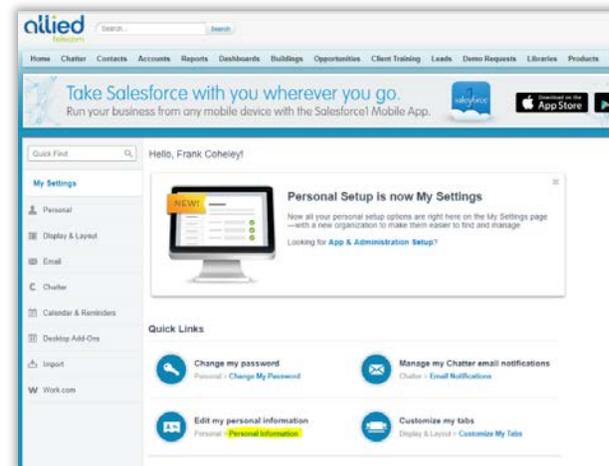
#### How to Generate your Salesforce Security Token:

*NOTE: If you are using your previous security token with any other integration with Salesforce you will need to launch that application and enter the new security token. If you have any issues, please email [salesforce\\_support@alliedtelecom.net](mailto:salesforce_support@alliedtelecom.net)*

1. Login to Salesforce with your Salesforce credentials.
2. Access the dropdown in the upper right-hand corner underneath your name and select **My Settings**.

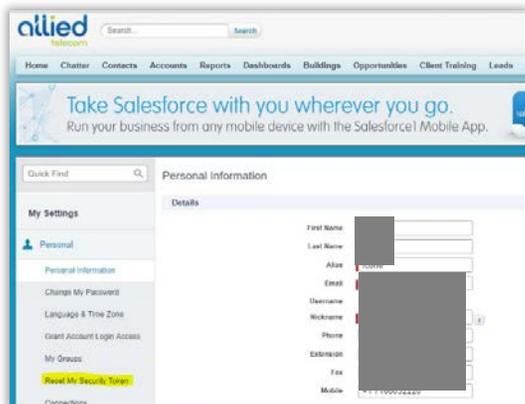


3. Select **Personal Information**.

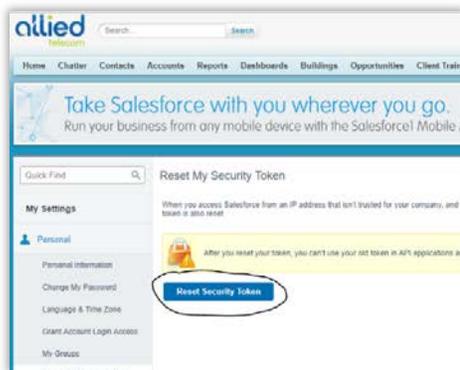


### How to Generate your Salesforce Security Token (continued)...

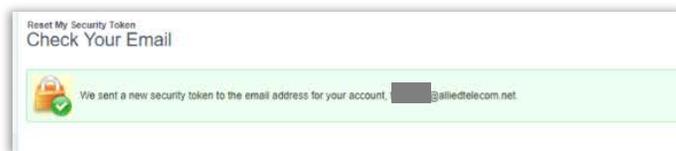
4. Select **Reset My Security Token** from the sidebar.



5. Click the **Reset Security Token** button.

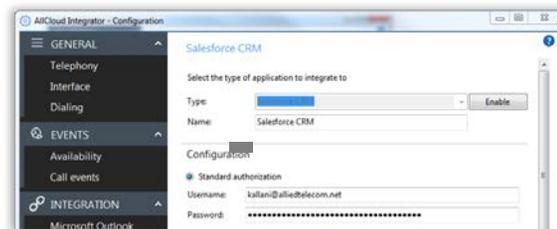


6. Salesforce will generate an email with your new security token.

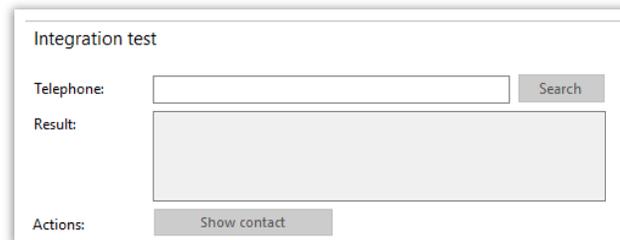


### Add Salesforce as an Integration (continued)...

1. In AllCloud Integrator, under **Integration**, select **Add New**.
2. Select the application type of Salesforce CRM and click **Set**.
3. Under **Configuration, Standard Authorization**, enter your Salesforce login credentials for the Username and Password. Right after your password (in the same line), enter your new security token from the Salesforce-generated email that was sent to you.



4. Click **Save**.
5. After you save, test the connection status. Under **Integration Test**, enter a telephone number that you know exists within Salesforce and select **Search**.



6. If successful, the contact information will display in the **Result** box.

