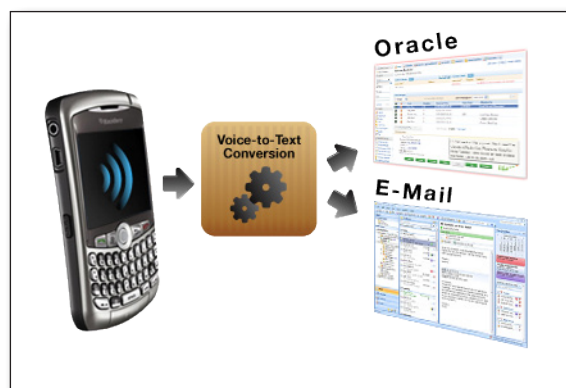


## User Guide

### An Overview of Ribbit for Oracle CRM On Demand

Ribbit for Oracle CRM On Demand unifies your critical sales tools – cell phone, CRM, and email – to help you become more productive. Automatic voice to text conversion ensures that the right information gets to the right place with a minimum of effort, so that you can focus on maximizing sales.



Here are a few ways that you can use Ribbit for Oracle CRM On Demand to make you more efficient:

**In a meeting:** No more dialing into voicemail — your voicemail messages are delivered via SMS or email so that you can scan them in your meeting and respond or forward immediately.

**On the go:** No more waiting to type notes until after you return from a meeting — simply call your meeting notes into Oracle CRM On Demand from your mobile phone while the information is fresh in your mind. Ribbit will send a draft of your notes or email straight to your inbox.

**At your computer:** Your calls, voice memos, and voicemail flow directly into CRM. Everything is in one place in Oracle CRM On Demand, where you can play, read, and search your messages. Messages map to contacts and easily attach to opportunities. Unidentified messages are kept private unless you assign them to a Oracle CRM On Demand record. Use the integrated phone to return calls or as a backup of your cell if you're ever out of range.

Ribbit for Oracle CRM On Demand works with U.S. AT&T, Verizon, and T-Mobile phones and select landlines.

## Registering your Mobile Device

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You will see a Ribbit activation wizard in the message box on your Oracle CRM On Demand home page. It will take you less than ten minutes and includes the steps below:

- 1) Enter your phone number.
- 2) Dial the provided Call Forwarding (CCF) code on your phone and press the call.
- 3) Click “Test” for Ribbit to place a call to your phone to verify that it is linked to Oracle CRM On Demand.
- 4) Call into the Ribbit service number to set up a voicemail PIN and record your greeting.

**Note:** Store the Ribbit service number as a speed dial so it’s faster to dial into voicemail

## How to Use Ribbit for Oracle CRM On Demand

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Ribbit is convenient to use wherever you are - whether you’re in a meeting, on the road, or sitting at your computer. There are lots of ways that you can use Ribbit to become more productive:

Using Ribbit on your mobile phone:

- 1) Read voice messages as text in individual SMS and/or emails
- 2) Call into your personal Ribbit Voice Center to listen to your voicemail and dictate voice memos and emails. Program this number into your phone’s speed dial:  
**(206) 453-1140**

Using Ribbit on your computer from inside Oracle CRM On Demand:

- 1) Read, listen, search and manage your voice memos and messages from the Ribbit Message Box.
- 2) Read and manage your voice memos, messages, call logs using standard Oracle CRM On Demand Activity History records.
- 3) Make and receive calls from the online Ribbit phone on any Oracle CRM On Demand page.

Using Ribbit within email:

- 1) Read and forward your voicemail within your email application
- 2) Write client emails faster by using Ribbit to dictate a first draft.
- 3) Listen to your voicemail by playing the attached MP3 file directly from your email.



## From Your Mobile Phone: Easy Message Access

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Ribbit for Oracle CRM On Demand enables you to do more with your mobile phone – so that you can stay productive, maximize your drive time, and reduce the time you spend typing.

### Text Message (SMS) Alerts (Configurable)

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You will receive a text message (SMS) alert every time you get a new voice message. The body of the text/SMS contains a clickable number that you can use to dial directly into voicemail and listen to the message.

### Email Notifications (Configurable)

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You will receive an email every time someone leaves you a voicemail; the body of the email contains the text transcription of the message. You can listen to the message by playing the attached MP3 audio file.

### Smart Voicemail

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- **Dial-In Access:** Dial into Ribbit's main voicemail number (206) 453-1140 to listen to your voicemail messages in the traditional way.
- **Call Return:** To call someone back immediately after listening to their voicemail message, press "3" on the keypad; you don't have to dial the number.
- **Send Voice Messages:** To send a voice message to anyone without having to place a full phone call, press "\*" to access the main voicemail menu and "2" to send a message.

**TIP:** Program the Ribbit Voicemail number into your speed dial. (206) 453-1140

# From your Mobile Phone: Create Voice Memos and Dictate Email Drafts

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## Record a Memo by Phone

Your voice memo will be transcribed and sent directly to Oracle CRM On Demand, saving you the time of manually entering notes.

## Leave a Voice Memo

Dial into the main Ribbit voicemail number (206 453-1140); press “\*” to access the main menu and press “5” to record a voice memo.

## Access Voice Memos

Find your voice memos and text transcriptions along with your other new messages in Oracle CRM On Demand. You can access them through the message box, by phone, or as a Sales-force activity record (task).

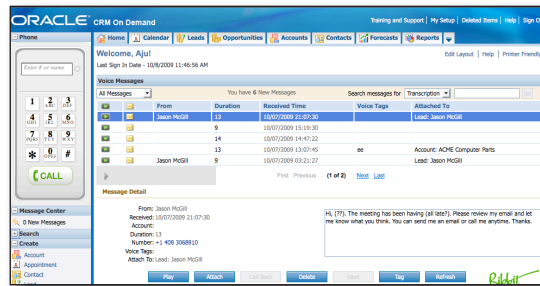
## Attach a Memo

Use the ATTACH feature to match the memo to the relevant record in Oracle CRM On Demand, saving you the time of manually entering notes.

**TIP:** To organize your voice memos more easily, create a new lead with the name “Voice Memo” and add your own mobile number; all of your voice memos will then be sent directly to this box.

# From your Computer: Manage Voice Messages in Oracle CRM On Demand

## How to Retrieve and Manage Your Voice Messages in Oracle CRM On Demand



**Home page message box:** All your messages along with text transcriptions and a full control panel are all in one place. Ribbit organizes your voice messages using the incoming caller ID to match voice messages with lead and contact phone numbers. You can see who called at a glance – the name of the contact/lead is displayed in the message box.

**Voice tasks:** New Oracle CRM On Demand tasks are automatically set up for messages that match to known leads and contacts and when you attach messages to other objects, such as opportunities and accounts.

**Note about message privacy:** Messages from caller ID's that are not matched in your Salesforce account will remain viewable only by you until they are attached to a record in Oracle CRM On Demand. Your personal messages remain private until attached to Oracle CRM On Demand.

### Play Message

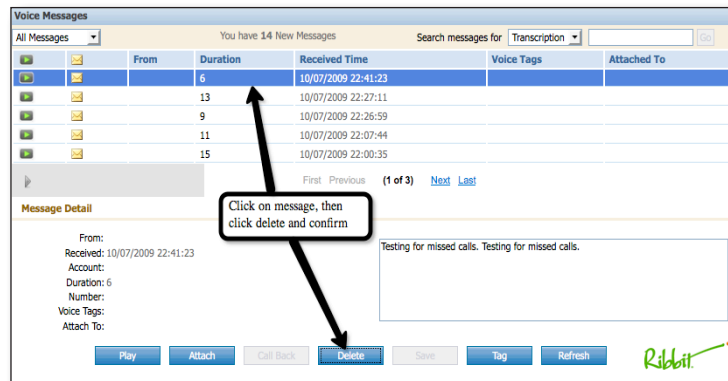
To listen to your voice messages through your PC speaker, click the play button next to any message.

### Read Message

- All voice messages are automatically converted to text
- Text transcription updates automatically flow into Oracle CRM On Demand within 10 minutes of new message arrival, for messages under 60 seconds in length
- Read messages by hovering over any message in a message box or by clicking on the message and looking in the message detail at the bottom of the message box area.

## Delete Message

- Messages are deleted by clicking the “DELETE” button and Clicking OK to confirm.



## Attach Message

- Click “ATTACH” to associate voice messages with other objects such as Opportunities, Contracts, Contacts, Campaigns, etc.
- A task is created on the selected record page in the Activity History list; the task contains a link to play the message as well as the text transcription of the message
- Share voice messages with your team by using the “Attach” feature; anyone who can access the task can read the message.

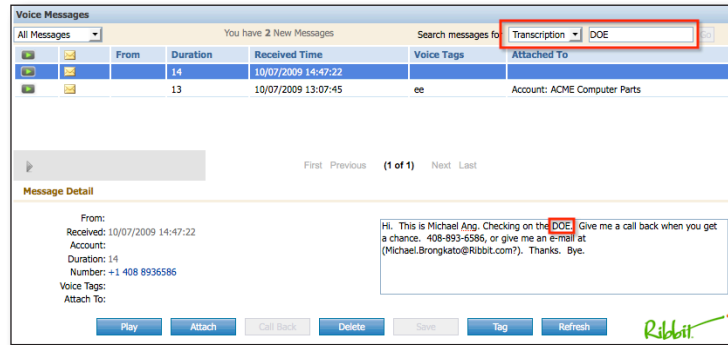
## Annotate and Tag Messages

Share voice messages with your team by using the “Attach” feature; anyone who can access the task can read the message.

- Add a tag to any message for easy searchable reference
- Click “TAG” after selecting a message to create a simple reference
- Click “TEXT” after selecting a message to edit message transcription

## Search Messages

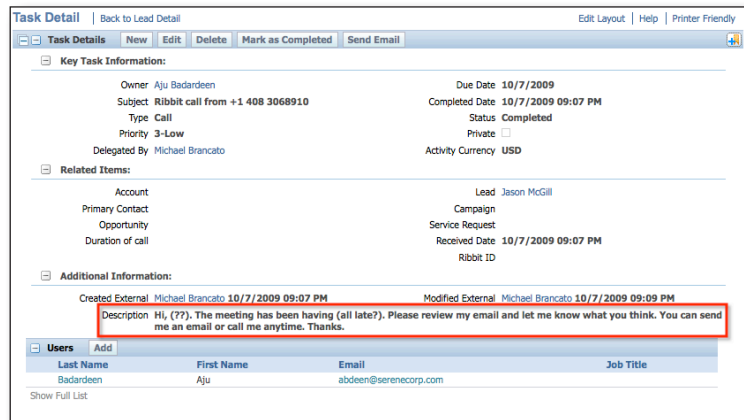
- Enter keyword in the SEARCH box to find messages
- The system will search all text content, including text transcriptions, and tags
- Easily look up a message based on what someone recorded, so you never have to worry about scribbling down info to keep it handy



## Automatic Activity history Creation

Enter keyword in the SEARCH box to find messages

- The system will search all text content, including text transcriptions, tags, and notes
- Easily look up a message based on what someone recorded, so you never have to worry about scribbling down info to keep it handy
- Click the button on the right end of the search box to clear the search and return the message box to normal view



## Secure Unlimited Message Storage

- No limit on the number of messages you can store
- The audio files are securely stored at our Oracle CRM On Demand certified hosting partner and streamed on demand when you want to play them from Oracle CRM On Demand
- Minimal impact on your Oracle CRM On Demand storage consumption

# From your Computer: Make and Receive Calls from Oracle CRM On Demand

Make and receive calls from within Oracle CRM On Demand with an online clone of your mobile phone. Dial from Oracle CRM On Demand contacts and get automatic logs. The web phone uses your caller ID but not your mobile minutes, making it a great way to get in touch when you can get online but don't have a mobile signal.



## Automatic Secure Login (Single Sign On)

- The phone automatically logs in every time you log in to Oracle CRM On Demand and every time you refresh a web page
- The buttons on the phone light up once login is complete, indicating that the phone is active

## Take a Call

- Unlimited inbound calling is included.
- If you don't answer the call on your mobile phone it will automatically ring the integrated web phone in Oracle CRM On Demand.
- A visual ring will alert you of an incoming call in your Ribbit phone inside Oracle CRM On Demand.
- At this time, there is not an audible ringer.
- Click "ANSWER" to pick up the call, or click "IGNORE"

**Note:** Make sure the Mic and speaker for Flash player is enabled prior to making a call. Click the following link <http://r4crm.ribbit.mobi/orawebapp/OraclePhone.swf>

All Messages	From	Duration	Received Time	Voice Tags	Attached To
	Jason McGill	13	10/07/2009 21:07:30		Lead: Jason McGill
		9	10/07/2009 15:19:30		
		14	10/07/2009 14:47:22		
		13	10/07/2009 13:07:45	ee	Account: ACME Computer Parts
	Jason McGill	9	10/07/2009 03:21:27		Lead: Jason McGill

**Message Detail**

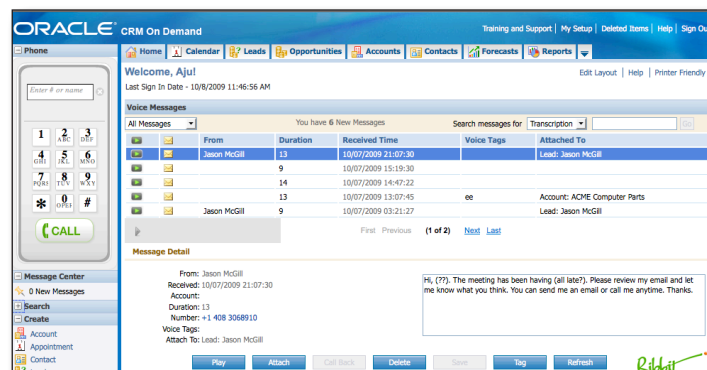
From: Jason McGill  
Received: 10/07/2009 21:07:30  
Account:  
Duration: 13  
Number: +1 408 3068910  
Voice Tags:  
Attach To: Lead: Jason McGill

H, (7). The meeting has been having (all late?). Please review my email and let me know what you think. You can send me an email or call me anytime. Thanks.

## Make a Call

- Your mobile phone number is used as your caller ID
- Save your mobile minutes, by using your computer and VoIP
- There are two easy ways to make a call: by number, or by contact name. Type the number or Name in from your PC then click “CALL”
- Type in the name of the person you are trying to reach to quickly get to the relevant contact

**Note:** Make sure the Mic and speaker for Flash player is enabled prior to making a call. Click the following link <http://r4crm.ribbit.mobi/orawebapp/OraclePhone.swf>



# Personal Settings

## Change Your Settings From Your Mobile Phone

- Record Your Name and Voicemail Greeting
  - o From the main menu, press “\*1” to record your name. Press “\*2” to record your greeting Change your Voicemail PIN
- Change your Voicemail PIN
  - o A voice messaging PIN is used so that you can securely call in from any phone/ device to retrieve your messages. To change your PIN, press “\*3” from the main menu.

## Activation and Deactivation Codes

To use Ribbit, you will need program your phone to send missed or ignored calls to Ribbit, which will bypass your standard carrier voicemail.

The table below shows the “star code” and number that sets call forwarding on busy/noanswer for the major mobile phone providers. Conditional call forwarding is a standard feature openly supported by the carriers – you do not need to contact them to activate it. To activate, dial the relevant code below just like you dial any regular phone number. If you are not fully satisfied, it’s easy to switch back at any time by dialing the deactivation code listed below.

Phone Activation and Deactivation Table

U.S. MOBILE SERVICE PROVIDERS	ACTIVATE	DE-ACTIVATE
ATT	*004*12064531140*11#	##004#
T-Mobile	*004*12064531140*11#	##004#
Verizon (Standard)	Call Forward Busy *902064531140	*900
	Call Forward No Answer *922064531140	*920
Verizon (Alternate)	Call Forward Busy *712064531140	*73
	Call Forward No Answer *712064531140	*73
Verizon (AllTel Customers)	*712064531140	*710

Thank you for your interest in Ribbit! If you have any further questions or feedback please contact us at [support@ribbit.com](mailto:support@ribbit.com) or call 1-800-474-2248.

