

Salesforce Call Center adapter integration manual

Adapter version 2.21

Introduction

The Call Center adapter offers click-to-dial, caller recognition, screen pop, call notes and reporting, all from within the Salesforce environment and without the need of any locally installed software.

Key features

- Click-to-dial enabled for every phone number field in Salesforce.
- Caller recognition on incoming calls.
- Configurable screen pop function (same window/new tab, automatic/manual, contact details/custom URL, etc. see [soft phone layout](#))
- Call log entries in the caller's activity history.
- Call labeling (e.g. made sale, left voicemail) of the log entry that can be used as filters for the Call Center Reports.
- Call Center Reports providing many statistics about calls of users and teams.

The screenshot displays the Salesforce CRM interface for a contact named Boris de Boers. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', and 'More'. The main content area is divided into several panels:

- Phone Panel (Left):** Shows call history with details for a 'Last inbound call' on 17-08-2021 at 11:50:47. The caller is identified as Christina Devlin. The call disposition is 'Call'. There are 'Update' and 'View' buttons at the bottom.
- Contact Information (Top Right):** Displays the contact owner as Boris de Boers and provides options to '+ Follow', 'New Case', 'New Note', and 'Submit for Approval'.
- Activity Panel (Right):** Shows a 'New Task' section with a 'Log a Call' button and a 'Create new...' input field. Below this, there are filters for 'All time', 'All activities', and 'All types'. A section titled 'Upcoming & Overdue' indicates 'No next steps' and suggests adding a task or meeting. A recent activity log shows an 'Inbound call...' on 'Today'.

On an incoming call the phone panel automatically slides in and shows the caller number and, if recognized, the corresponding name on button to open the caller's page. Users can also label the call and update the call description. Notice that with the call center enabled, all the user's contact phone numbers have a phone icon with which the contact can be called.

Prerequisites

- Salesforce Professional, Enterprise, Performance, Unlimited, or Developer Edition.
- Salesforce Classic Experience or Salesforce Lightning Experience.
- The installation within Salesforce requires user permission "Manage Call Centers".
- CloudCTI Salesforce Call Center license or equivalent.

Getting Started

Package installation

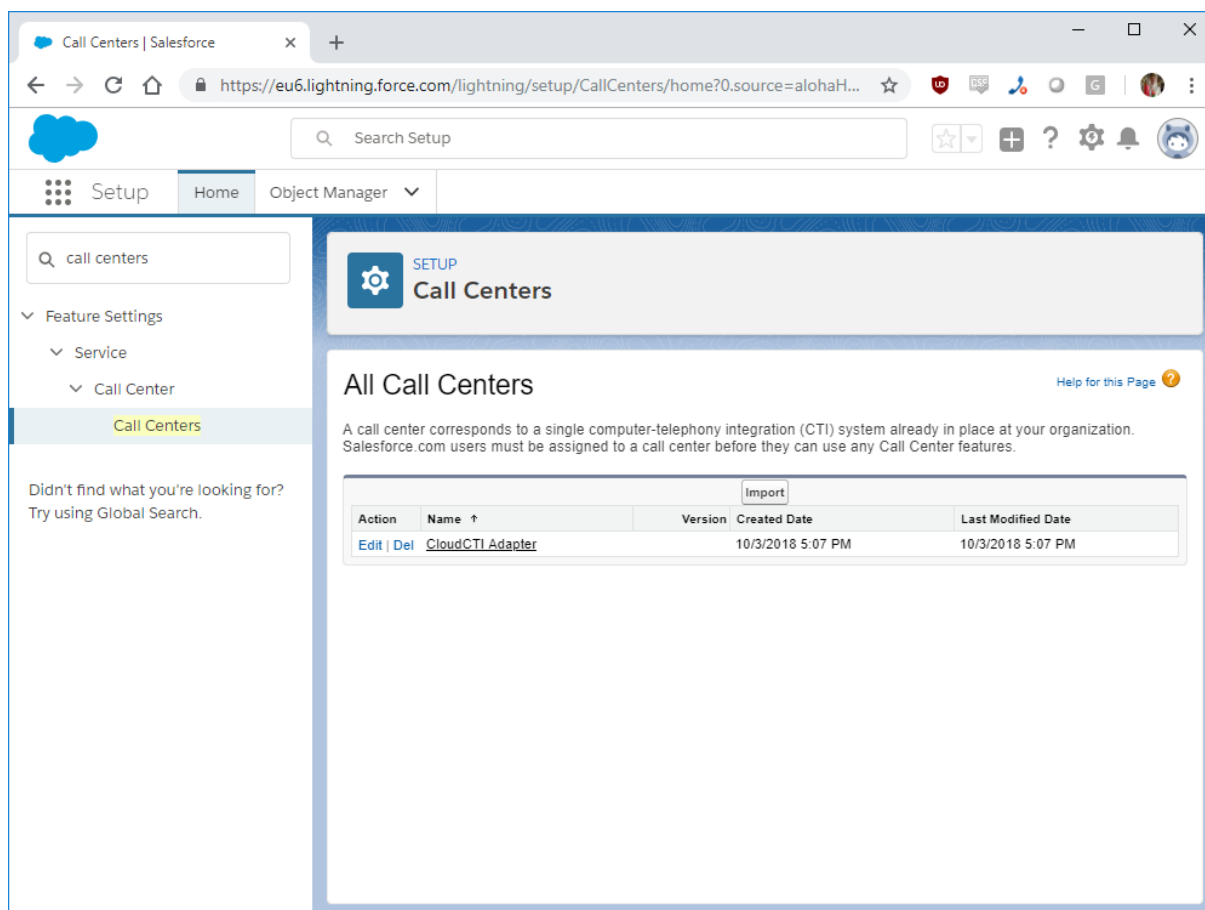
Install the call center package from the Salesforce AppExchange with the following link:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1t000001Eb3z>

Salesforce will ask whether you want to make this package available to all users or a specific group. If you choose all users, it will not affect them until they are assigned explicitly to the call center in the next step. If the installation takes too long Salesforce will send an email notification when the process is complete.

After the package is installed you will see the call center listed under Setup (cog wheel, upper right) and then in the left panel /Platform Tools/Feature Settings/Service/Call Center/Call Centers; Note, the location may be different with different editions. The Salesforce help recommends to enter 'Call Centers' in the Quick Find box, see:

https://help.salesforce.com/articleView?id=cti_admin_manageagentsadd.htm&type=0



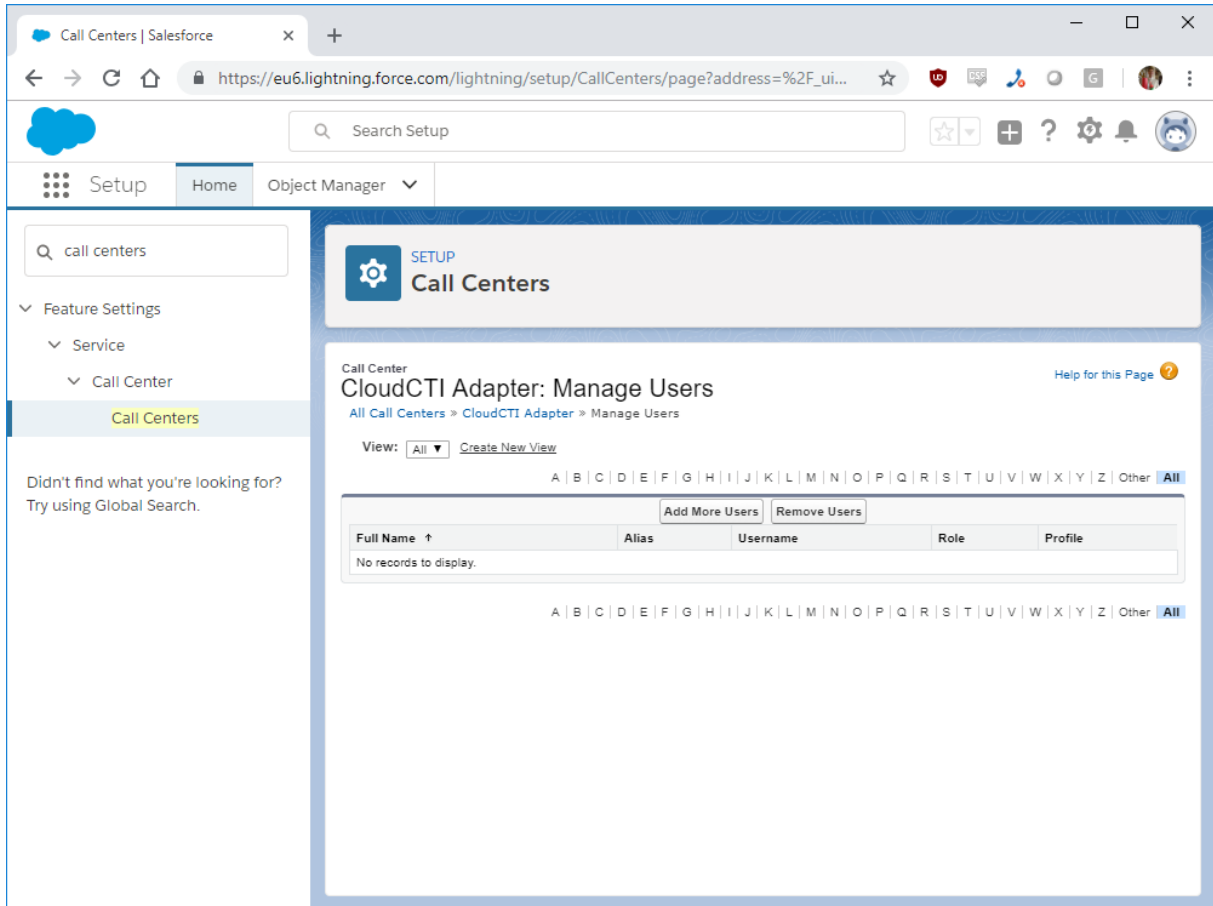
The screenshot shows the Salesforce Setup interface for Call Centers. The left sidebar contains a search bar with 'call centers' and a navigation menu with 'Feature Settings', 'Service', and 'Call Center' expanded, showing 'Call Centers' selected. The main content area is titled 'All Call Centers' and includes a description: 'A call center corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce.com users must be assigned to a call center before they can use any Call Center features.' Below this is a table with one entry:

Action	Name ↑	Version	Created Date	Last Modified Date
Edit Del	CloudCTI Adapter		10/3/2018 5:07 PM	10/3/2018 5:07 PM

The CloudCTI Adapter is listed under Platform Tools/Feature Settings/Service/Call Center/Call Centers. Editing the call center values allow you the change the phone panel standard height and width and the available call disposition codes (see 'Using the Soft Phone panel '). All other values should not be changed.

Set up users

Click the Call Center Adapter, then 'Manage Call Center Users', 'Add More Users', optionally enter a search term and click 'Find' to list users which are assigned to the call center by selecting them and clicking 'Add to Call Center'.



Select the users to assign the call center to them.

Soft phone layout

With softphone layouts, you can configure different screen pop behavior for different user profiles. The softphone of a sales person might show related leads, accounts, and opportunities, while the softphone of a support rep might show related cases and solutions. Amongst others, you can specify what to show if the incoming caller number has no match, exactly one match or multiple matches and whether the information should be shown in the same browser window or in a new window or tab.

The screenshot displays the Salesforce Setup interface for configuring Softphone Layouts. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top left contains 'call center'. The left sidebar shows a navigation tree with 'Call Center' expanded, and 'Softphone Layouts' selected. The main content area is titled 'Softphone Layouts' and shows a configuration for a 'softphone layout' which is the default layout for 'Inbound' calls. The configuration includes sections for 'Softphone Layout' and 'Screen Pop Settings'.

Softphone Layout Configuration:

- Name: softphone layout
- Is Default Layout:
- Select Call Type: Inbound

Softphone Layout Section:

- Display these call-related fields:
 - Caller ID, Dialed Number (Edit)
- Display these salesforce.com objects:
 - Account, Contact, Lead (Add / Remove Objects)
 - If single Account found, display: Account Name (Edit)
 - If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
 - If single Contact found, display: Name (Edit)
 - If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
 - If single Lead found, display: Name (Edit)
 - If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

Screen Pop Settings Section:

- Screen pops open within: Existing browser window (Edit)
- No matching records: Don't pop any screen (Edit)
- Single-matching record: Pop detail page (Collapse)
 - Don't pop any screen
 - Pop detail page
 - Pop to Visualforce page
 - Pop to flow: --None--
- Multiple-matching records: Pop to search page (Edit)

All users with the call center functionality should have a soft phone layout. It is recommended to start with a default and change this later after gaining some experience with the call center.

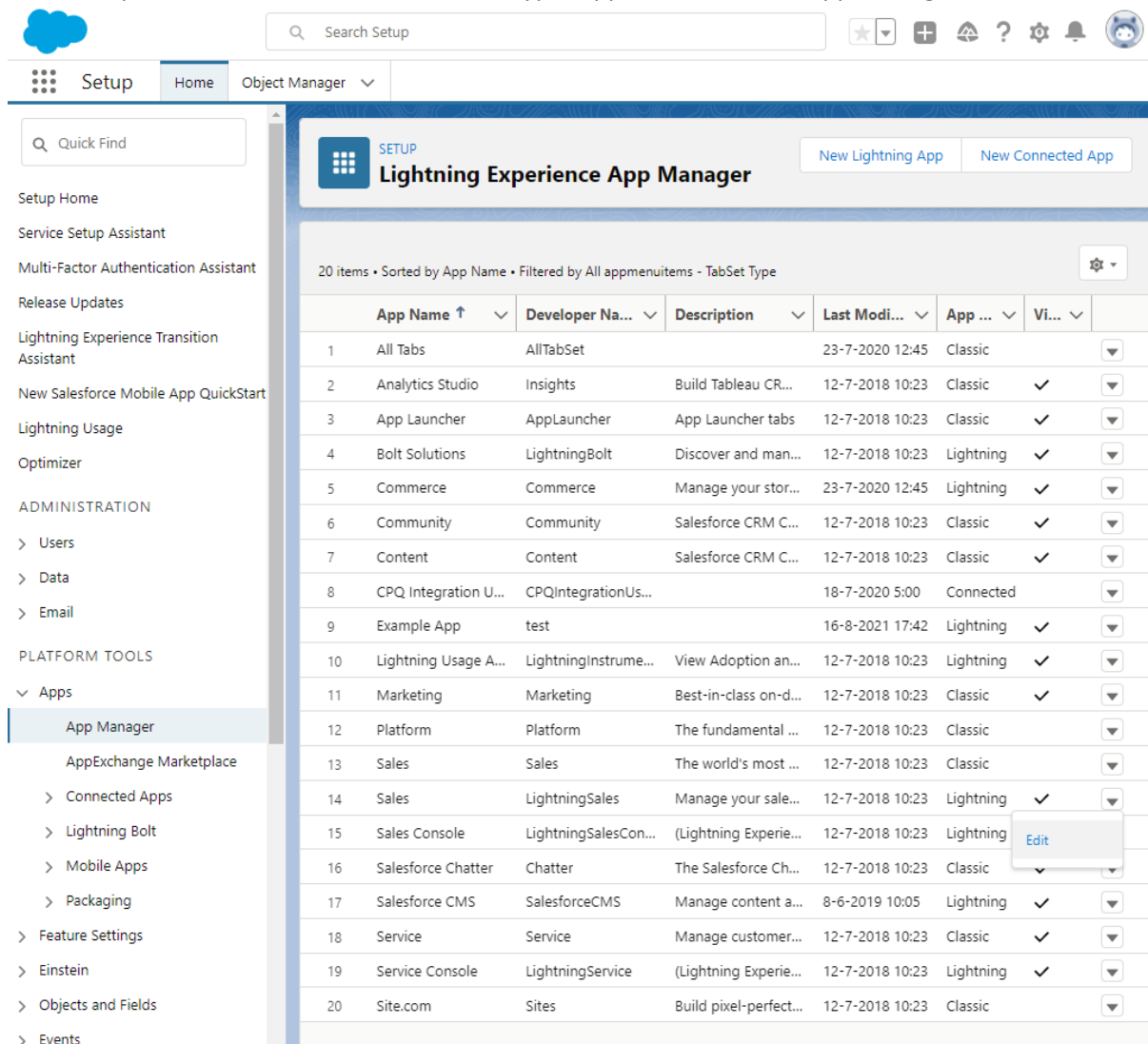
For more Salesforce help see:

https://help.salesforce.com/articleView?id=cti_admin_phonelayoutscreate.htm&type=0&language=en_US&release=206.10

Use in a Lightning App

With Salesforce Lightning, you use a collection of tools to create a highly customized app. To use Call Center Adapter, users must have the 'Open CTI Softphone Utility' added to the Lightning app they use. Please follow these steps:

- 1) Goto Setup and in the Quick Find search bar type 'App' and then click 'App Manager'

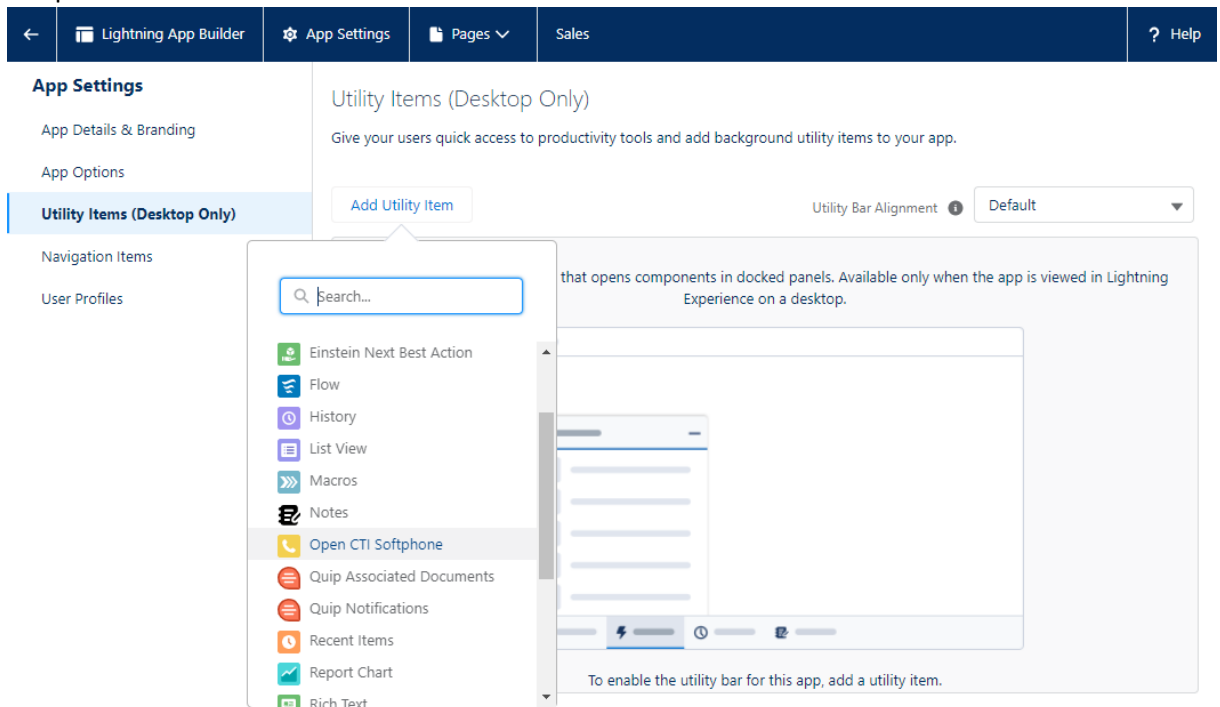


The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains 'Search Setup'. The left sidebar shows a 'Quick Find' search bar and a list of navigation items, with 'App Manager' selected under the 'Apps' category. The main content area is titled 'Lightning Experience App Manager' and displays a table of 20 items. The table columns are: App Name, Developer Name, Description, Last Modified, App Type, and Visibility. An 'Edit' button is visible over the 'Sales Console' row.

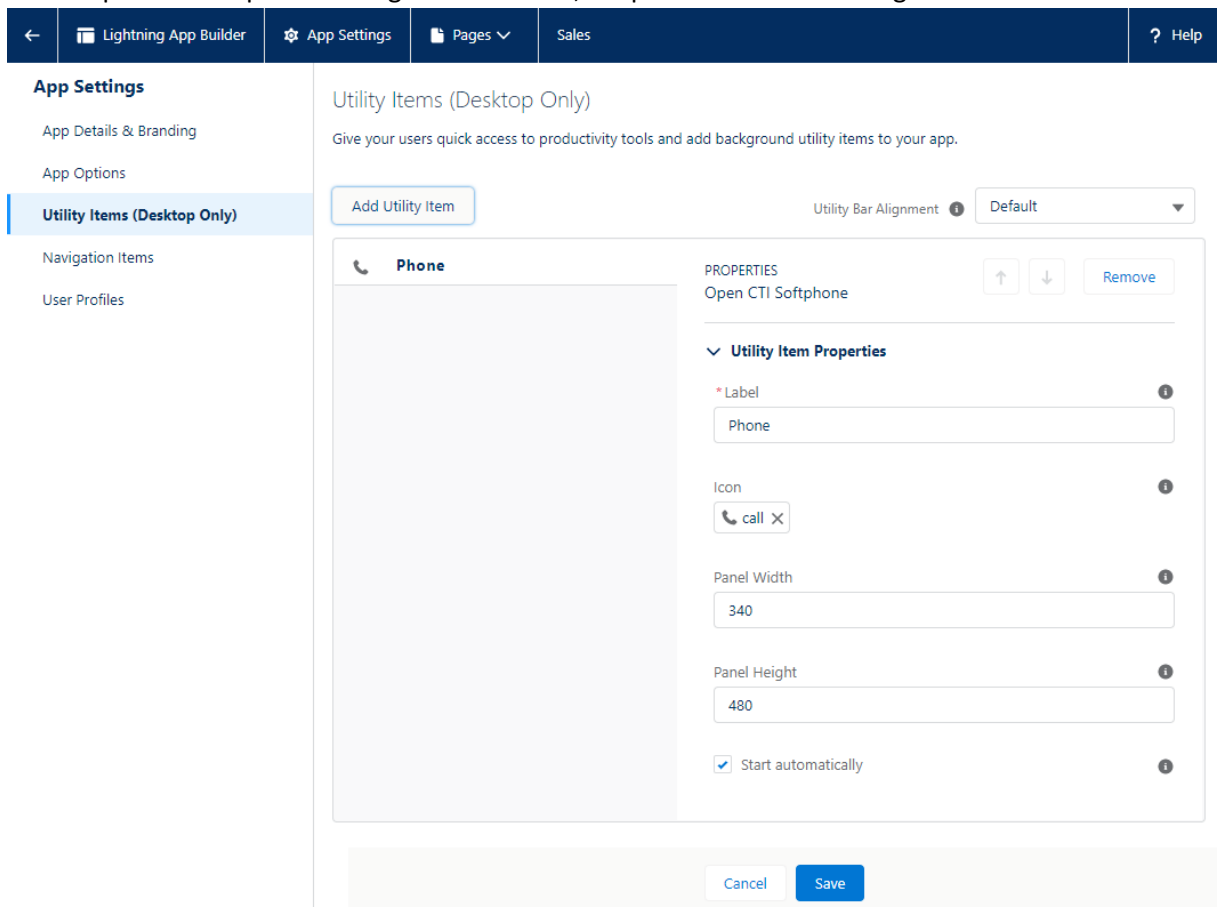
	App Name ↑	Developer Na...	Description	Last Modi...	App ...	Vi...
1	All Tabs	AllTabSet		23-7-2020 12:45	Classic	
2	Analytics Studio	Insights	Build Tableau CR...	12-7-2018 10:23	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	12-7-2018 10:23	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and man...	12-7-2018 10:23	Lightning	✓
5	Commerce	Commerce	Manage your stor...	23-7-2020 12:45	Lightning	✓
6	Community	Community	Salesforce CRM C...	12-7-2018 10:23	Classic	✓
7	Content	Content	Salesforce CRM C...	12-7-2018 10:23	Classic	✓
8	CPQ Integration U...	CPQIntegrationUs...		18-7-2020 5:00	Connected	
9	Example App	test		16-8-2021 17:42	Lightning	✓
10	Lightning Usage A...	LightningInstrume...	View Adoption an...	12-7-2018 10:23	Lightning	✓
11	Marketing	Marketing	Best-in-class on-d...	12-7-2018 10:23	Classic	✓
12	Platform	Platform	The fundamental ...	12-7-2018 10:23	Classic	
13	Sales	Sales	The world's most ...	12-7-2018 10:23	Classic	
14	Sales	LightningSales	Manage your sale...	12-7-2018 10:23	Lightning	✓
15	Sales Console	LightningSalesCon...	(Lightning Experie...	12-7-2018 10:23	Lightning	✓
16	Salesforce Chatter	Chatter	The Salesforce Ch...	12-7-2018 10:23	Classic	
17	Salesforce CMS	SalesforceCMS	Manage content a...	8-6-2019 10:05	Lightning	✓
18	Service	Service	Manage customer...	12-7-2018 10:23	Classic	✓
19	Service Console	LightningService	(Lightning Experie...	12-7-2018 10:23	Lightning	✓
20	Site.com	Sites	Build pixel-perfect...	12-7-2018 10:23	Classic	

To configure a new app click 'New Lightning App' and follow the steps in the wizard. As an example here, the Phone Util will be added to the standard 'Sales' lightning app by clicking the 'Edit' button on the right.

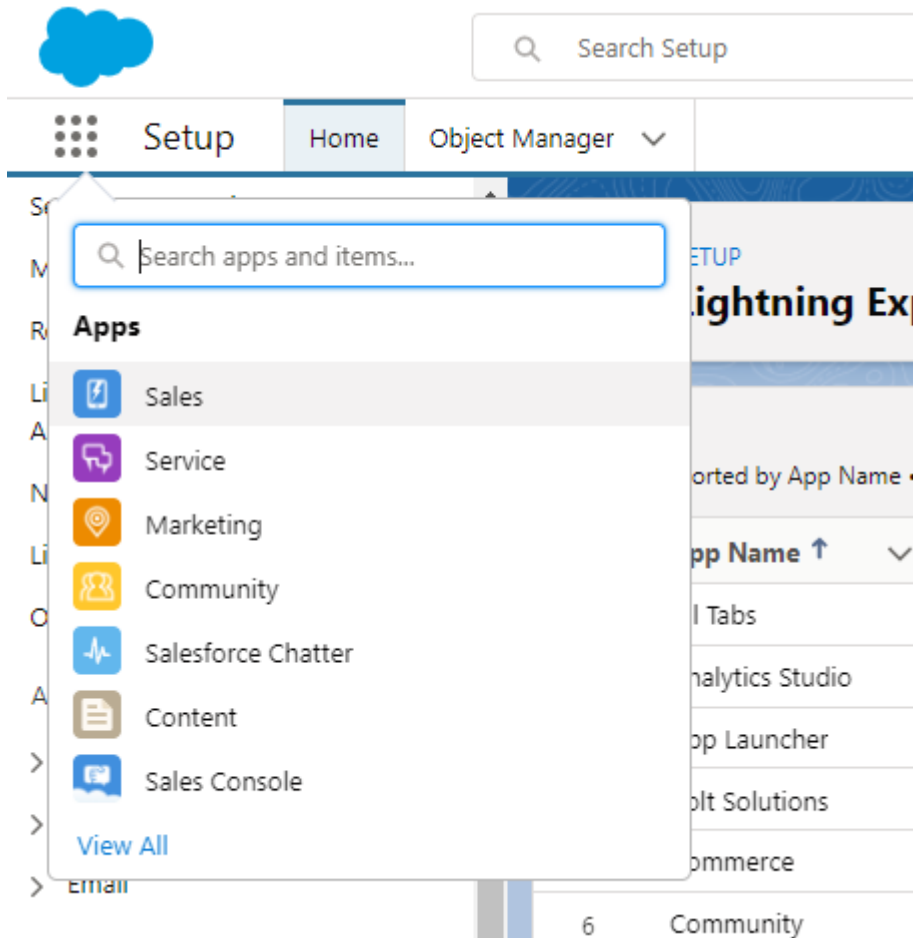
2) The next screen shows the Lightning App Builder. Click 'Utility Items' and Select the 'Open CTI Softphone'



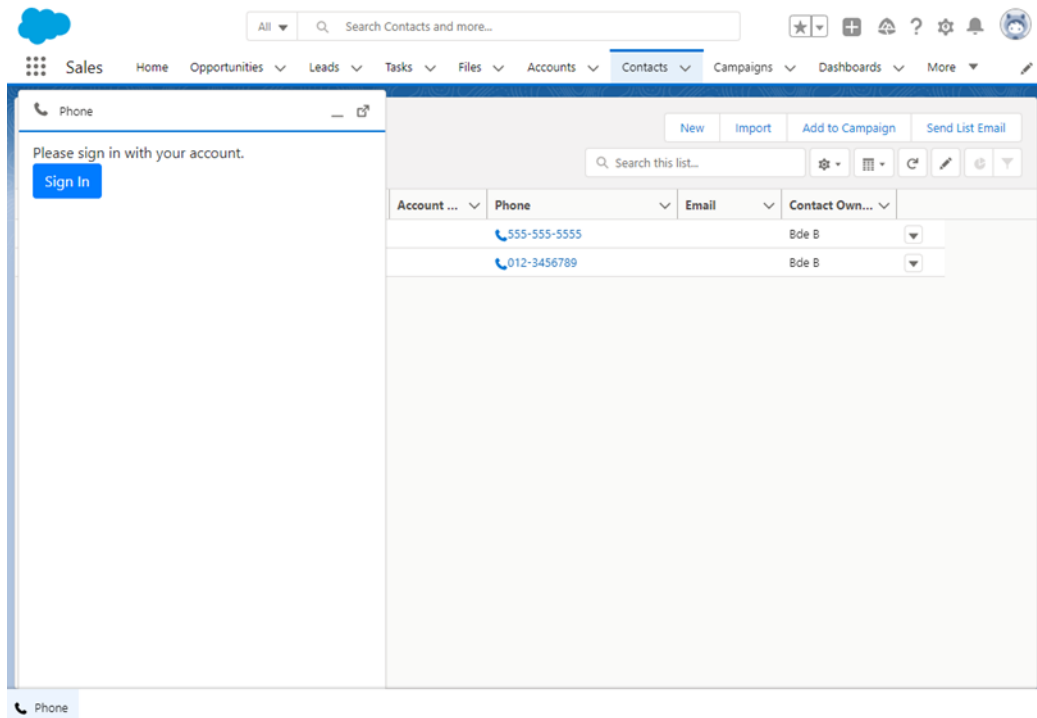
3) In the Open CTI Softphone configuration screen, keep all the default settings and click 'Save'.



- 4) Go back by clicking the top left 'back' arrow, and click the App Launcher (nine dots)



- 5) By selecting the Lightning App for which the Phone Util has just been added, 'Sales' in this example, Salesforce will open the app which should show the 'Phone' button on the bottom right.



Sign in to connect to your telephony system.

Outbound dialing

When a Salesforce App uses the Open CTI Utility, and a user is signed in, all phone numbers automatically show a phone icon. Clicking the icon sends the 'make call' command to the call center and the pre-configured phone settings are then used to initiate a new call to the specific destination.

Inbound caller recognition

On an incoming call the softphone panel shows the number of the caller, the date and time of the call and two small buttons. The left button copies the number to the clipboard and the right button calls back the number.

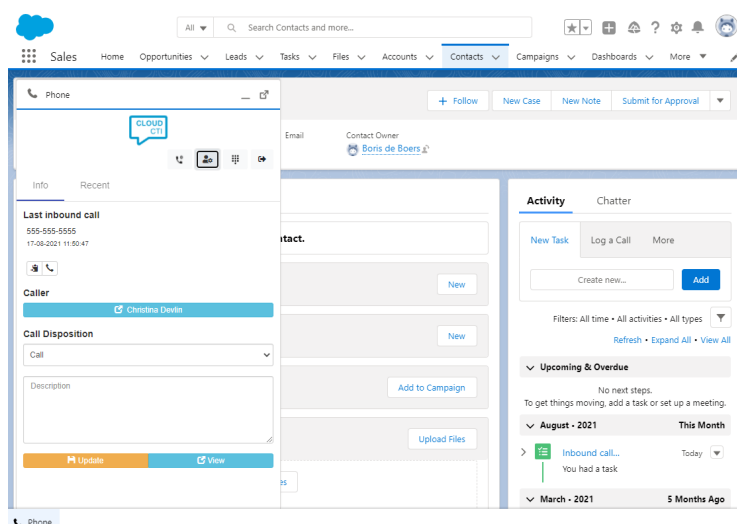
If the caller has multiple matches, all are shown in a dropdown list with a button 'view caller'. If there is one single match, the button shows the name of the caller. Whether the caller's page is immediately shown, or opened in a new tab, depends on the settings of the Soft Phone Layout.

If there is a single match, or if the correct match has been selected from the dropdown list, the call can be added to the caller's 'Activity History'. The call can be labeled with a 'call disposition'. By default, the possible dispositions are: Call, Made Sale, Number Disconnected, Left VM, Send Letter, Send Quote and Other. These can be modified with the call center setup, see 'Package Installation' up above. The labels of the calls are also shown in the Activity History list of the caller and moreover, they can be used as filters in call reports (see 'Call reporting, below).

In addition to the labeling, a call can also be further described with a comment or description. These are also shown in the Activity History list of the caller. When a call record is added to a contact, it is also directly visible with the overview of the account the contact is associated with.

Furthermore, a call subject is created with each call. The default is '{{direction}} call from/to {{phonenumber}}'. This can be changed in the softphone's User Settings under 'Call Settings'. Usable parameters are {{direction}} for inbound/outbound, {{name}} for the caller's name, {{phonenumber}} for the caller's phone number and {{calldisposition}} for the selected call disposition.

Other settings which can be changed in the 'Call Settings' are which Call Disposition should be the default for each call and whether a new call with an exact match should automatically be registered to the caller's 'Activity History'. Under UI settings you can change whether the 'Info' tab is automatically selected on a call event (in contrast to it staying on the 'Recent' tab in the softphone if that's the selected tab). Also you can select the 'Show softphone in console on new call.' option if you want the softphone panel to pop up on a call event.



Call reporting

Salesforce Reports offers ample possibilities for creating and customizing reports offering insight in many user statistics. To create a report which shows the calls, go to Reports and click 'New Report'. Choose the 'Task and Events' Report Type under Activities and click Continue. The calls saved as completed activities, so to show these go to 'Filters' and make sure these are included in the report.

The screenshot shows the Salesforce Reports interface for a 'New Tasks and Events Report'. The 'Filters' panel on the left has three filters: 'Add filter...', 'Show Me My team's activities', and 'Date On or after 10-Aug-2021'. Below these are two 'Show' buttons: 'Open Activities' (highlighted) and 'Tasks and Events'. The main report area displays a message: 'No records returned. Try editing report filters:'. Below this are two suggestions: 'Show All activities.' and 'Set the Date filter to All Time.'. An 'Edit Filter' dialog box is open, showing a 'Show' dropdown menu with 'Open Activities' selected. The dropdown list includes 'Open Activities' (checked), 'Completed Activities', and 'Open & Completed Activities'.

The report can be customized as wished. Useful Columns to include are 'Subject', 'Call Result' and 'Comments'.

The screenshot shows the 'New Tasks and Events Report' with a total of 1 record. The table below shows the details of the record.

	Date ↑	Contact	Lead	Subject	Call Result	Comments
1	17-8-2021	Christina Devlin	-	Inbound call from 555-555-5555	Call	This is a test comment

Customized reports can be named, saved and made available to specific groups. The calls in the reported can be filtered per team or person. In addition, the label that is assigned to a call disposition can be filtered in the report as 'call result'. This allows, for example, to show the number of calls that resulted in a sale of a specific team, within a specific time frame.