

**Brekeke PBX**

**CTI for Salesforce Lightning**

**Quick Setup Guide**

**Version 2.7**

**Brekeke Software, Inc.**

### Version

Brekeke PBX v2.7 CTI for Salesforce Lightning Quick Setup Guide

### Copyright

This document is copyrighted by Brekeke Software, Inc.

Copyright © 2015 Brekeke Software, Inc.

This document may not be copied, reproduced, reprinted, translated, rewritten or readdressed in whole or part without expressed, written consent from Brekeke Software, Inc.

### Disclaimer

Brekeke Software, Inc. reserves the right to change any information found in this document without any written notice to the user.

### Trademark Acknowledgement

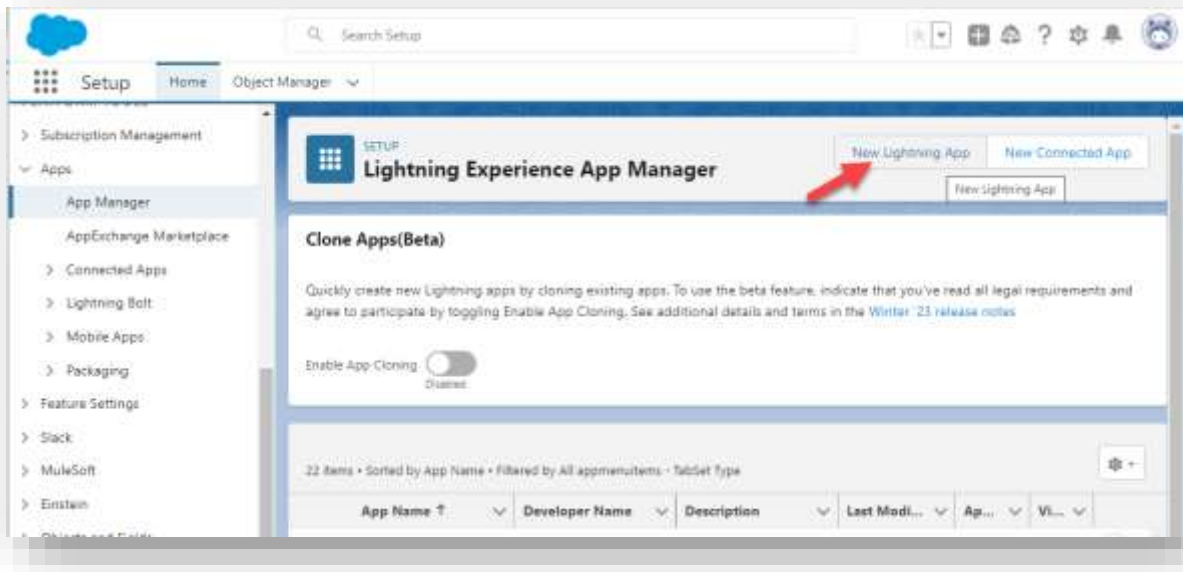
- ◆ *LINUX is a registered trademark of Linus Torvalds in the United States and other countries.*
- ◆ *Salesforce is a registered trademark of Salesforce.com, inc.*
- ◆ *Windows is a trademark or registered trademark of Microsoft Corporation in the United States and other countries.*
- ◆ *Other logos and product and service names contained in this document are the properties of their respective owners.*

- 1. HOW TO CONFIGURE BREKEKE PBX WITH SALESFORCE ..... 3**
  - 1.1. Install and Configure the Demo Adapter.....Error! Bookmark not defined.**
  - 1.2. Create Lightning application..... 3**
  - 1.3. Setup Call Center Adapter ..... 6**
  - 1.4. Log in to Salesforce CRM and check CTI ..... 7**
  
- 2. SETUP FOR LINKS OF RECORDING FILES..... 11**
  - 2.1. Create a link object at Salesforce CRM..... 11**
  - 2.2. Check if the links work properly. .... 14**

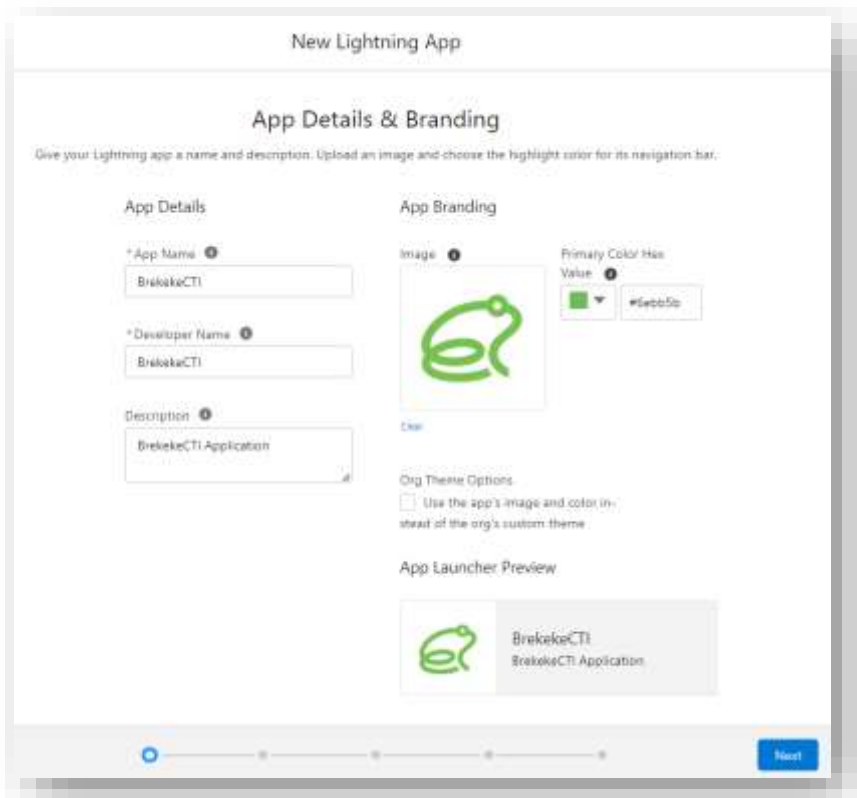
# 1. Integrate Brekeke PBX Widget with Salesforce

## Create Lightning application

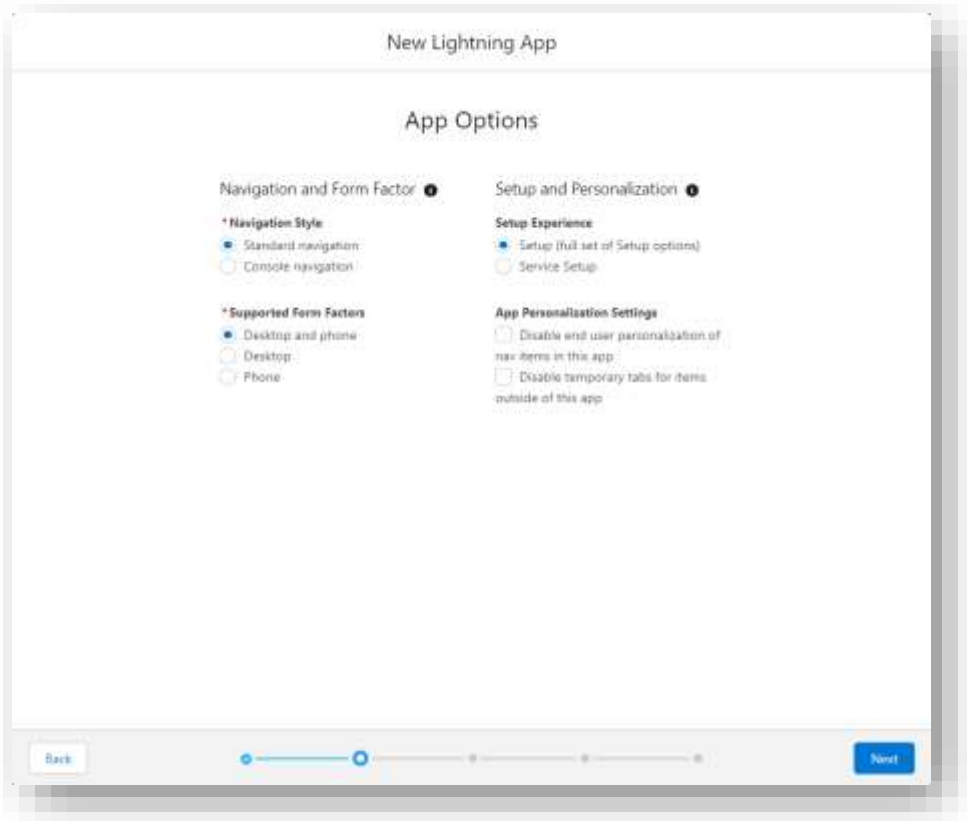
Go to setup and from Quick Find search option find “App Manager”. Add new application by clicking [New Lightning App].



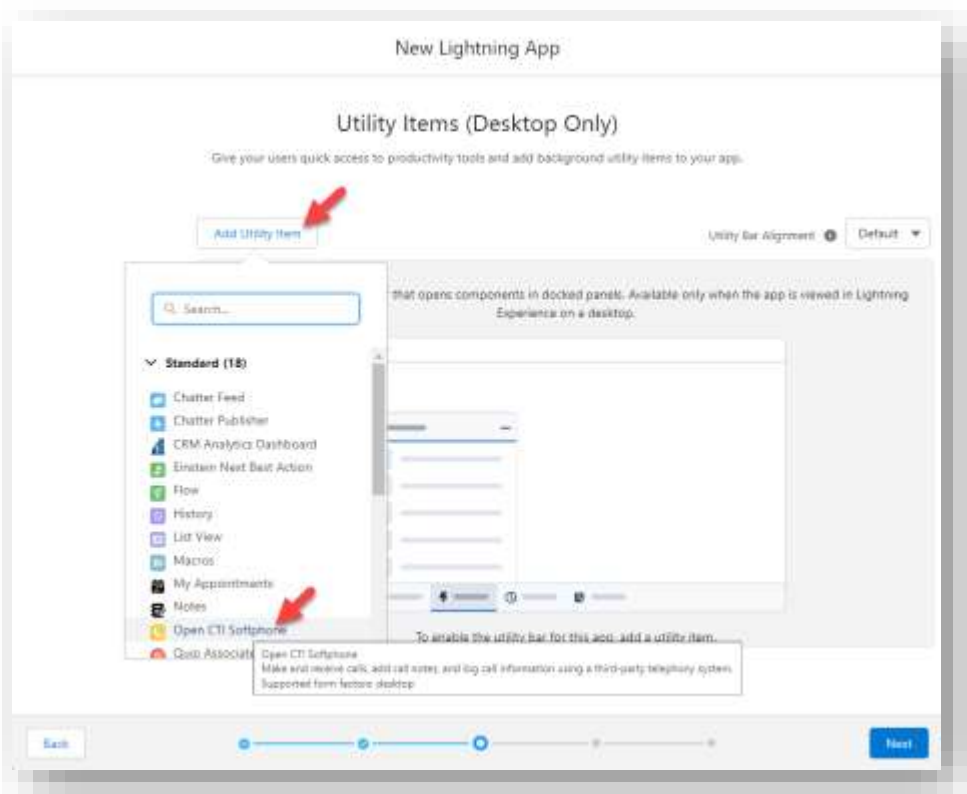
Assign AppName, Developer Name and Description.



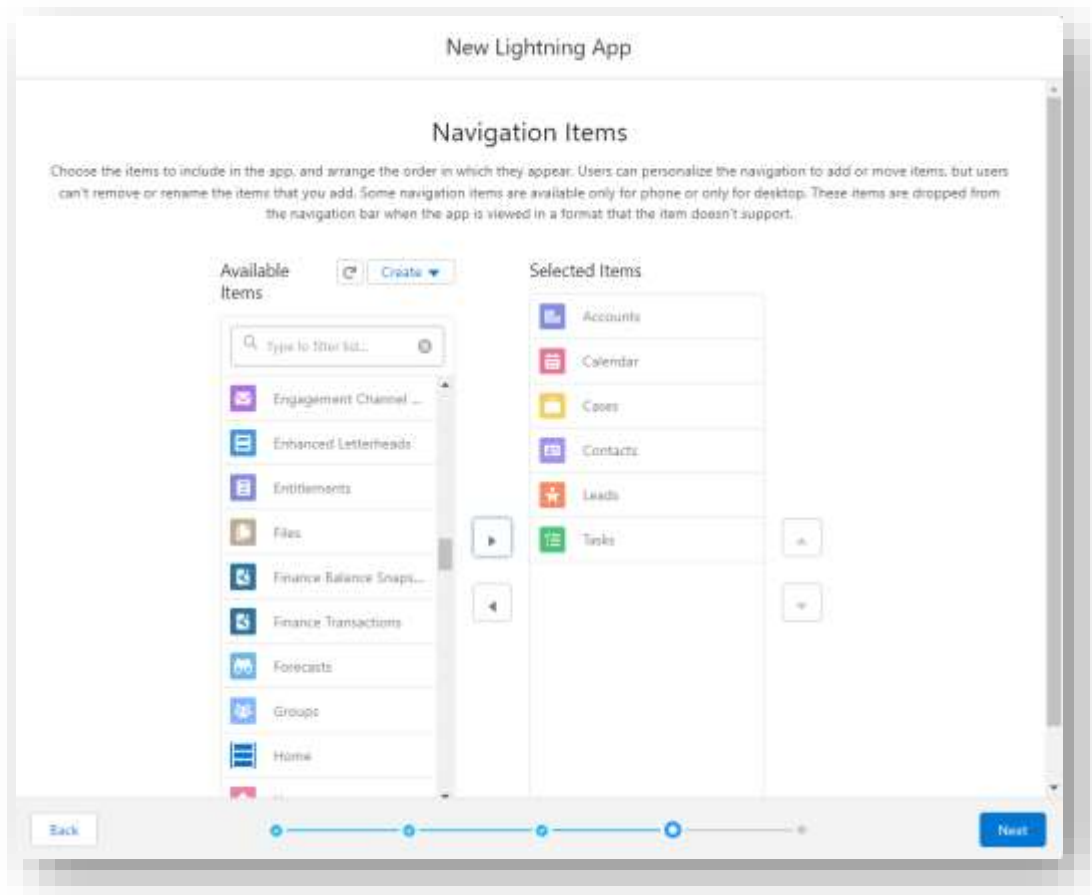
Configure the lightning app



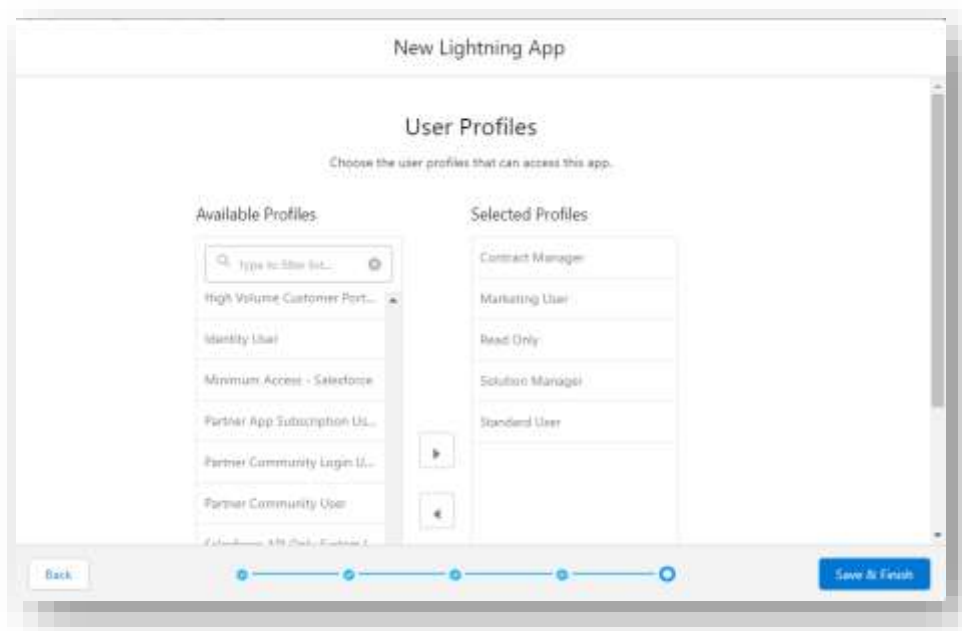
Add Utility Item and select “Open CTI softphone”.



Add required Navigation Items.



Add user profiles as per organization need.

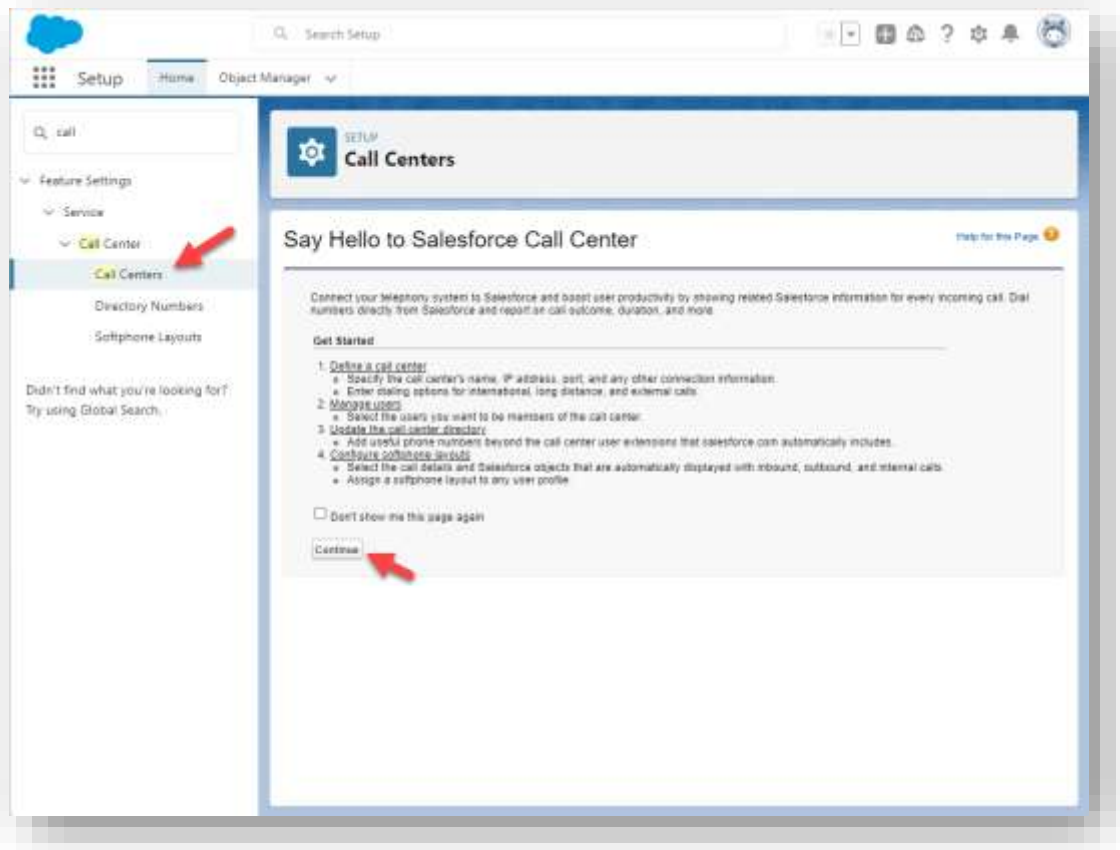


\*If system administrator will test the app later, include "System Administrator".

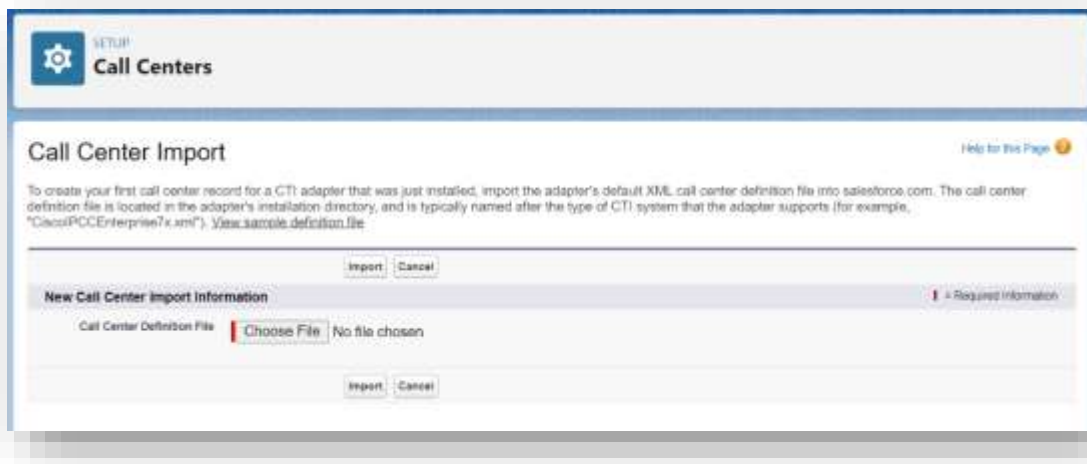
Application creation is completed.

## Configure Call Center Service

Select [Call Centers] from the quick find menu.



Import the “BrekekeCallcenter.xml” file.



Change the value of [CTI Adapter URL] and [CTI Standby URL] fields for your environment.  
Then click Manage Call Center User to add users.

Q call

Feature Settings

Service

Call Center

**Call Centers**

Directory Numbers

Softphone Layouts

Didn't find what you're looking for?  
Try using Global Search.

SETUP

Call Centers

Call Center

BrekekeCTI

All Call Centers > BrekekeCTI

Call Center Detail

Edit

Delete

Clone

General Information

Internal Name	BrekekeCTI
Display Name	BrekekeCTI
CTI Adapter URL	https://brekeke.com:8443/pbx/etc/widget/salesforce/index.html
CTI Standby URL	https://brekeke.com:8443/pbx/etc/widget/salesforce/index.html
Use CTI API	true
URL Request Timeout	10000
Softphone Height	550
Softphone Width	400
Salesforce Compatibility Mode	Lightning

Dialing Options

Outside Prefix	
Long Distance Prefix	
International Prefix	

Call Center Users

Manage Call Center Users

Call Center Users by Profile

System Administrator	1
Total	1



## Configure Softphone Layout

Go to setup and from Quick Find search option find “Softphone Layout”. Add new Softphone Layout by the “New” button.

Check the [is Default Layout] check box.

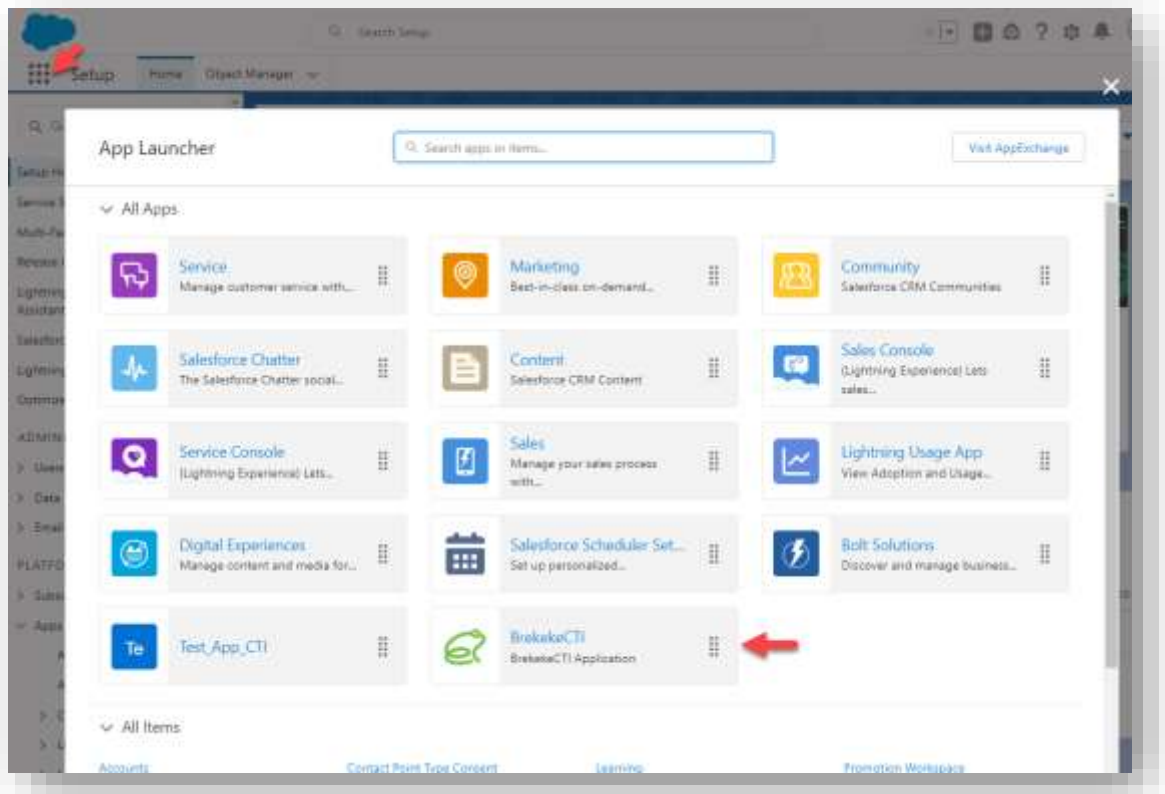
Select “Inbound” at the [Select Call Type].

Configure Screen Pop Settings.

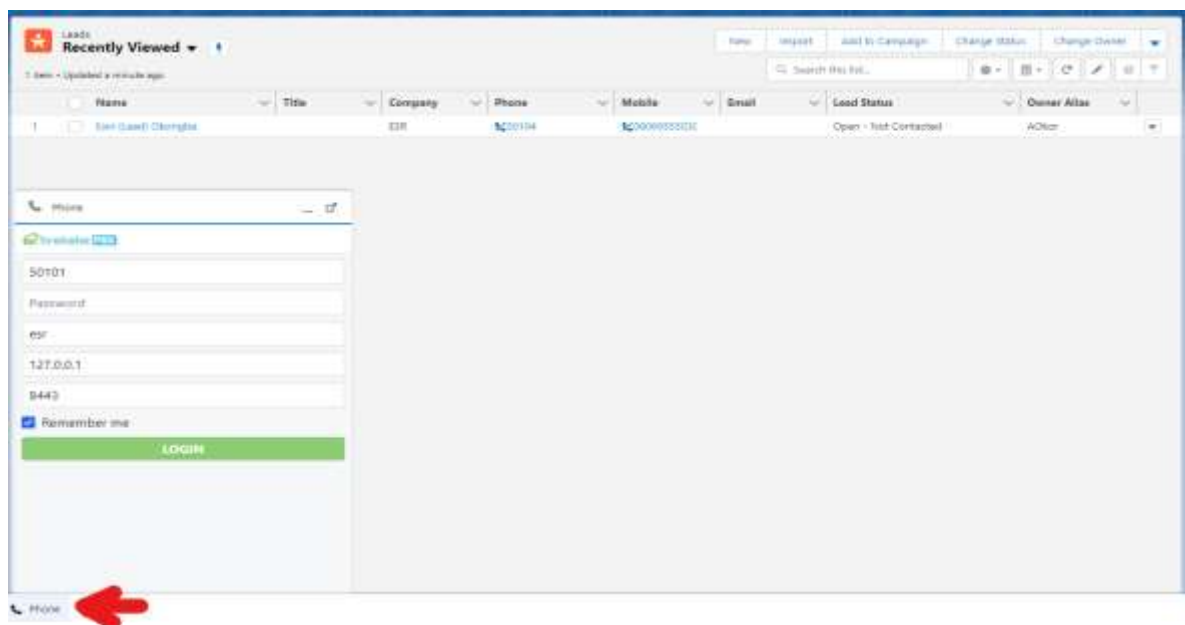
The screenshot shows the Salesforce Setup interface for configuring Softphone Layouts. The left sidebar contains navigation links for Setup, Home, Object Manager, and Softphone Layouts. The main content area is titled 'Softphone Layouts' and 'Softphone Layout Edit'. It includes a 'New' button, a text field for the layout name (currently 'Standard softphone layout'), and a checked 'Is Default Layout' checkbox. Below this is a 'Select Call Type' dropdown menu set to 'Inbound'. The 'Softphone Layout' section allows users to display call-related fields and Salesforce objects. The 'Screen Pop Settings' section is expanded, showing options for screen pops opening in existing or new browser windows, and rules for matching records (No matching, Single-matching, Multiple-matching) with pop-to actions like 'Pop to new', 'Pop to Visualforce page', or 'Pop to flow'.

## Log in Salesforce CRM and check CTI

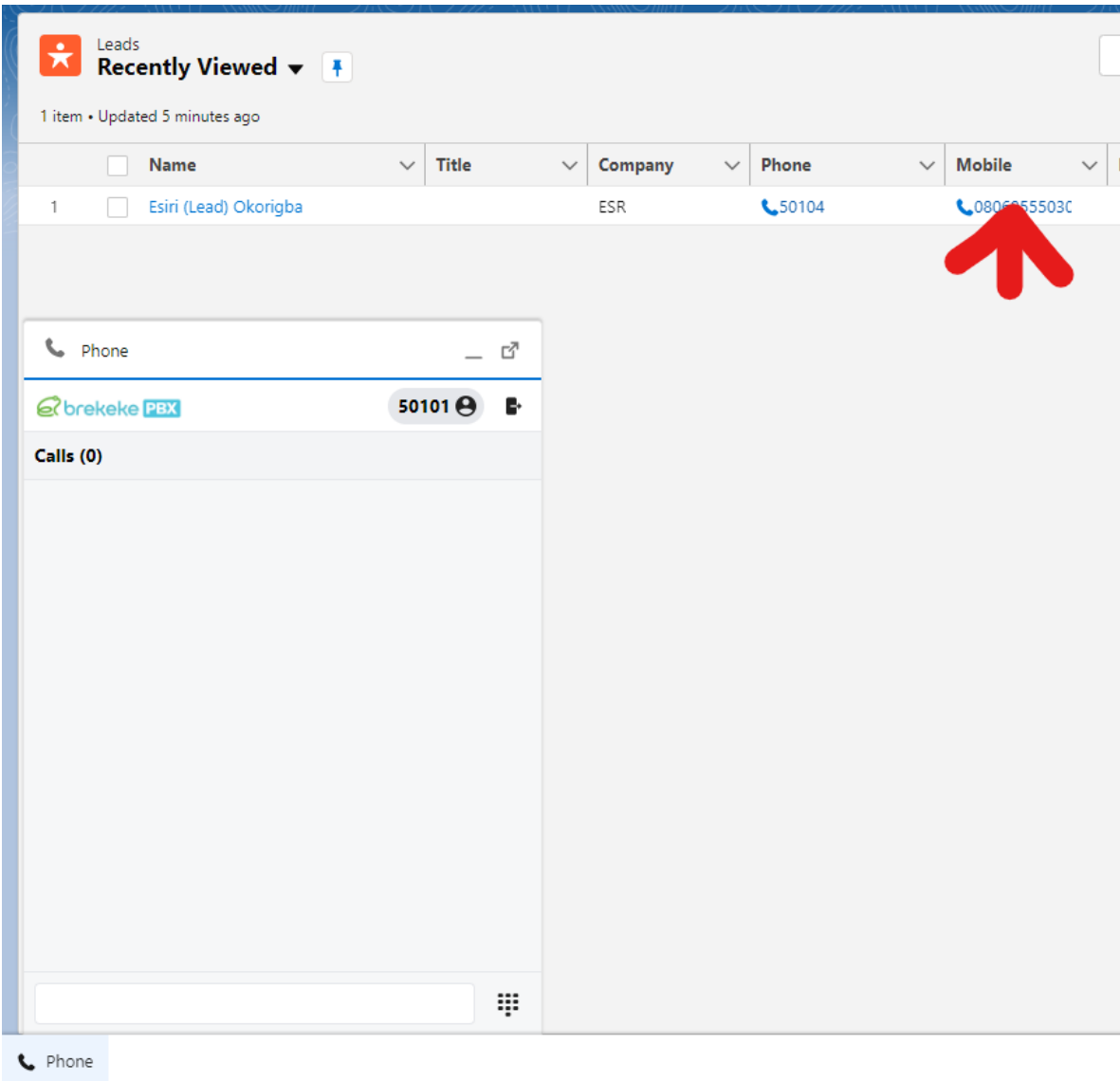
- 1) Log in salesforce CRM and at [App Launcher], select the application you created.



- 2) In the application, when you click the [Phone] icon located at bottom left, Brekeke Widget login menu is automatically launched.



- 3) After you log in Brekeke Widget, you can make a call from both of the phone icons in salesforce CRM and a client tool bar.

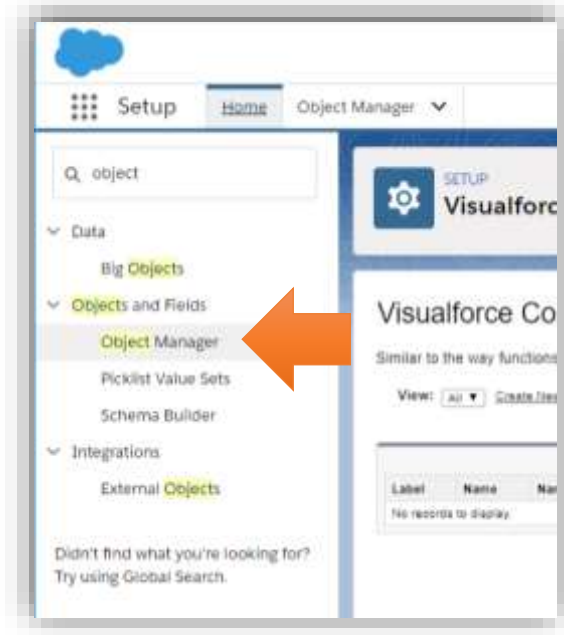


Reference Salesforce.com "Lightning Open CTI"  
([https://developer.salesforce.com/page/Lightning\\_Open\\_CTI](https://developer.salesforce.com/page/Lightning_Open_CTI))

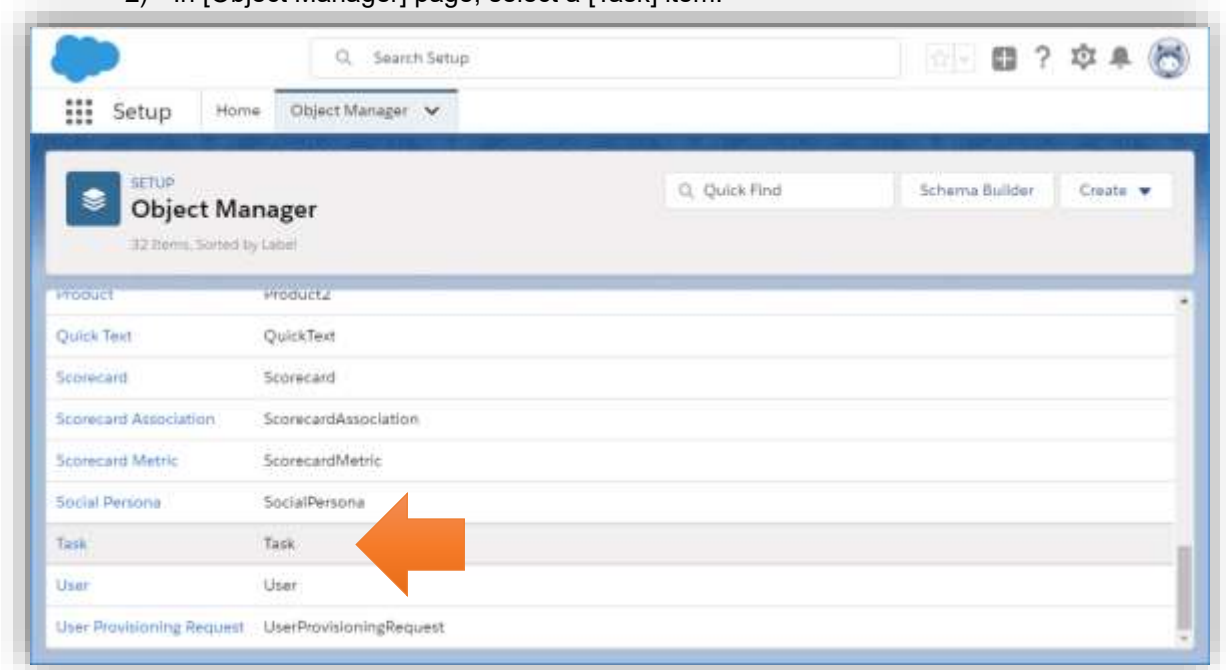
## Setup for links of recording files

### Create a link object at Salesforce CRM.

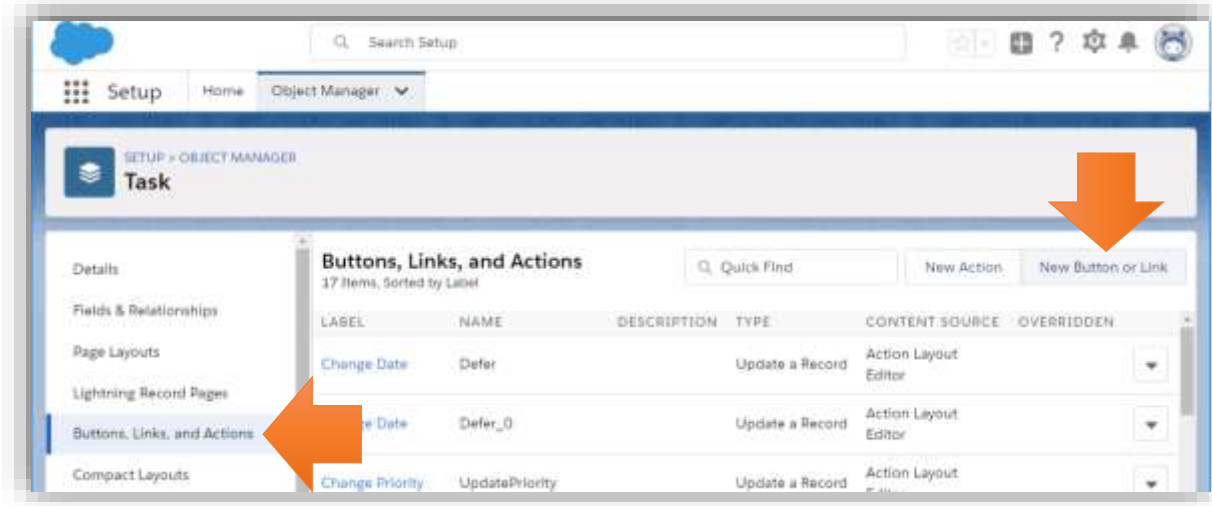
- 1) Move to [Object and Fields] > [Object Manager].



- 2) In [Object Manager] page, select a [Task] item.



3) Move to [Buttons, Links, and Actions] page, then click a [New button or Link] button.

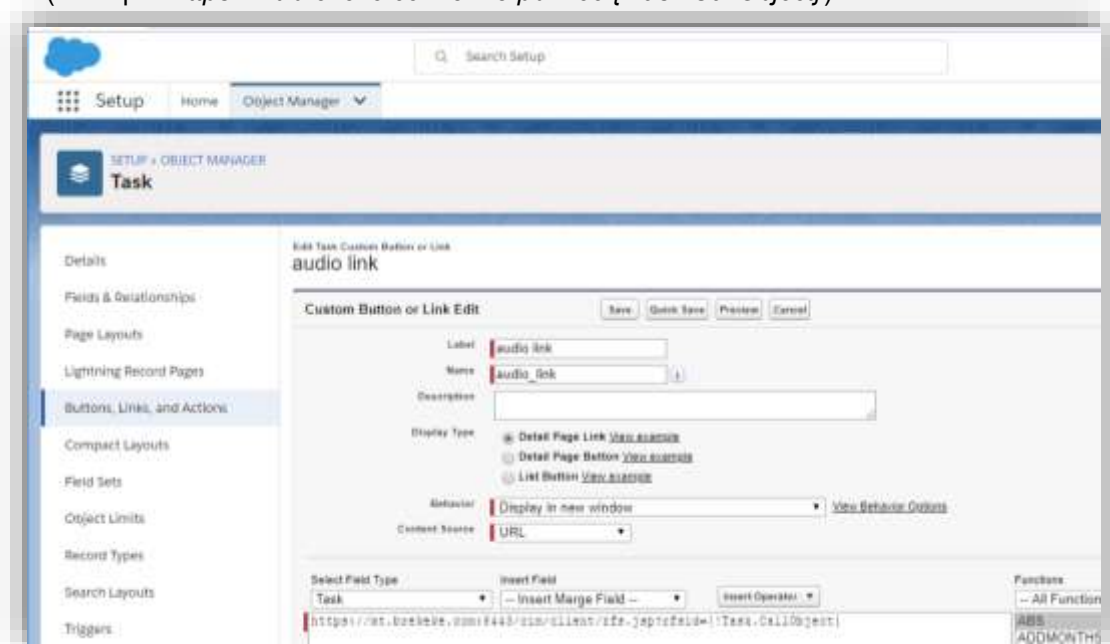


4) Edit the details as follows and save it.

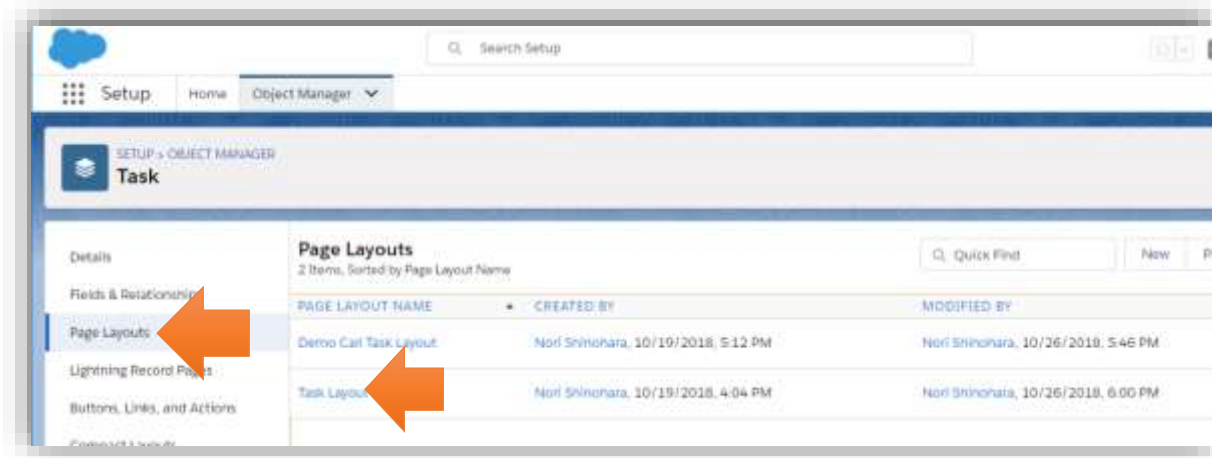
- Label : Any label (Example: *audio link*)
- Name : Any name (Example: *audio link*)
- Display Type : “Detail Page Link”
- Behavior : “Display in new window”
- Content Source : “URL”
- Select Field Type : “Task”
- URL:

*https://<your\_brekeke\_pbx\_host\_address>:<port>/pbx/rec/{!Task.CallObject}*

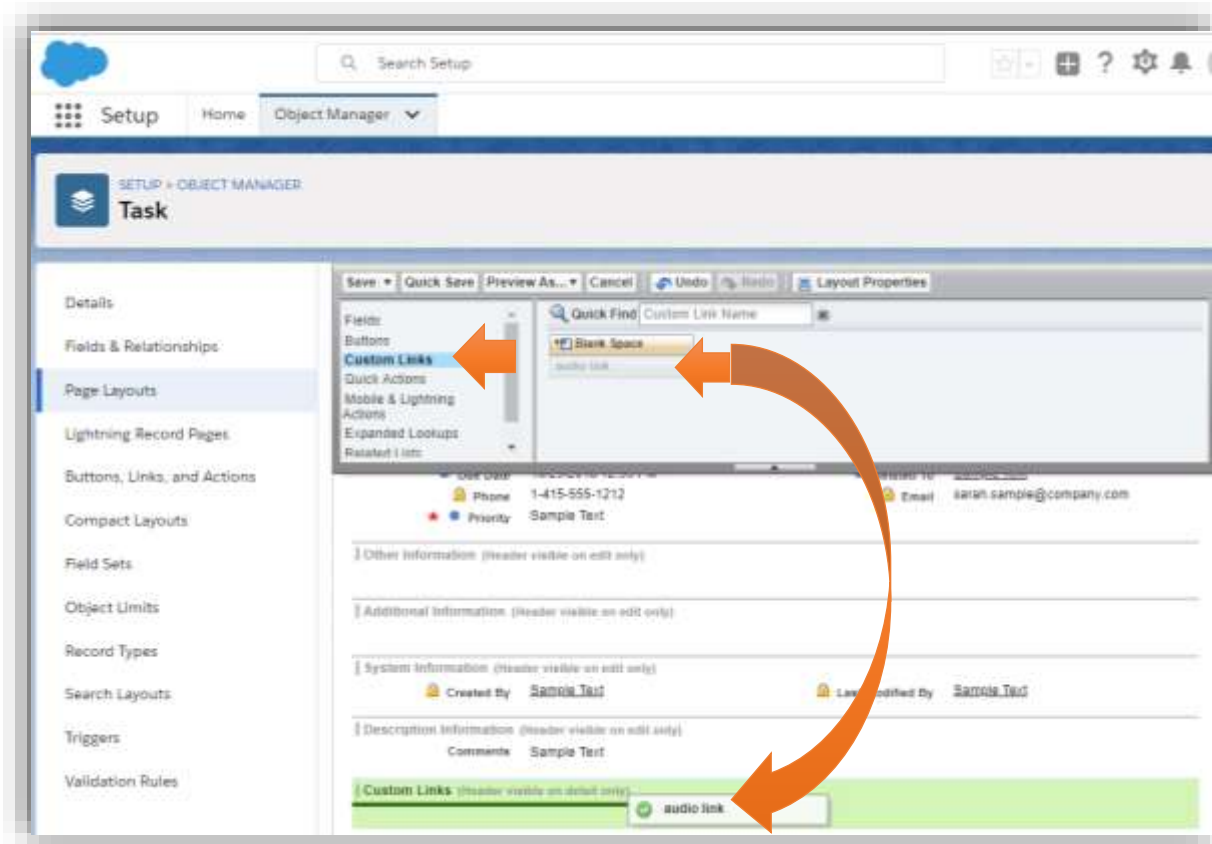
(Example: *https://mt.brekeke.com:8443/pbx/rec/{!Task.CallObject}*)



- 5) Move to the [Page Layouts] menu and select a page layout where you want to add link. Here, click “Task Layout” as example.

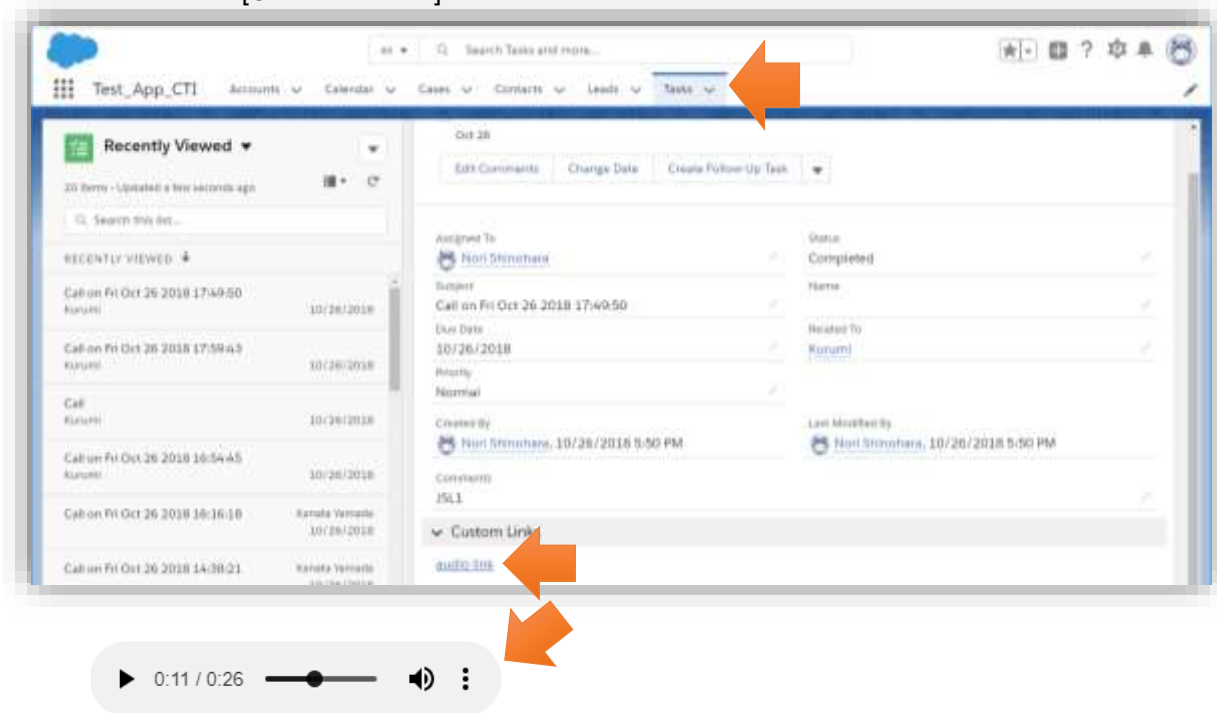


- 6) Select [Custom Links] menu, then drag the “audio link” object that was created in previous steps and drop it in the [Custom Links] section.



## 1.1. Check if the links work properly.

- 1) Log in to Salesforce CRM. Then Move to the [Tasks] page. The “audio link” is shown at [Customer Links] section.



Reference Salesforce.com "Create Custom Buttons and Links"

([https://trailhead.salesforce.com/en/content/learn/modules/lex\\_customization/lex\\_customization\\_buttons\\_links](https://trailhead.salesforce.com/en/content/learn/modules/lex_customization/lex_customization_buttons_links))