

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

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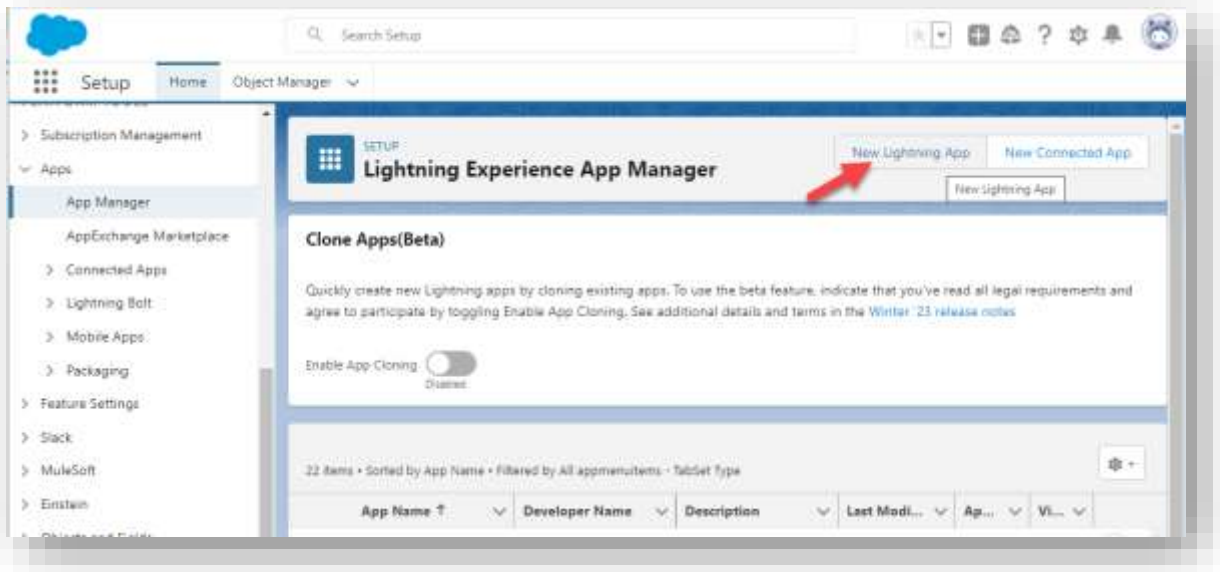
- 1. HOW TO CONFIGURE BREKEKE PBX WITH SALESFORCE 3**
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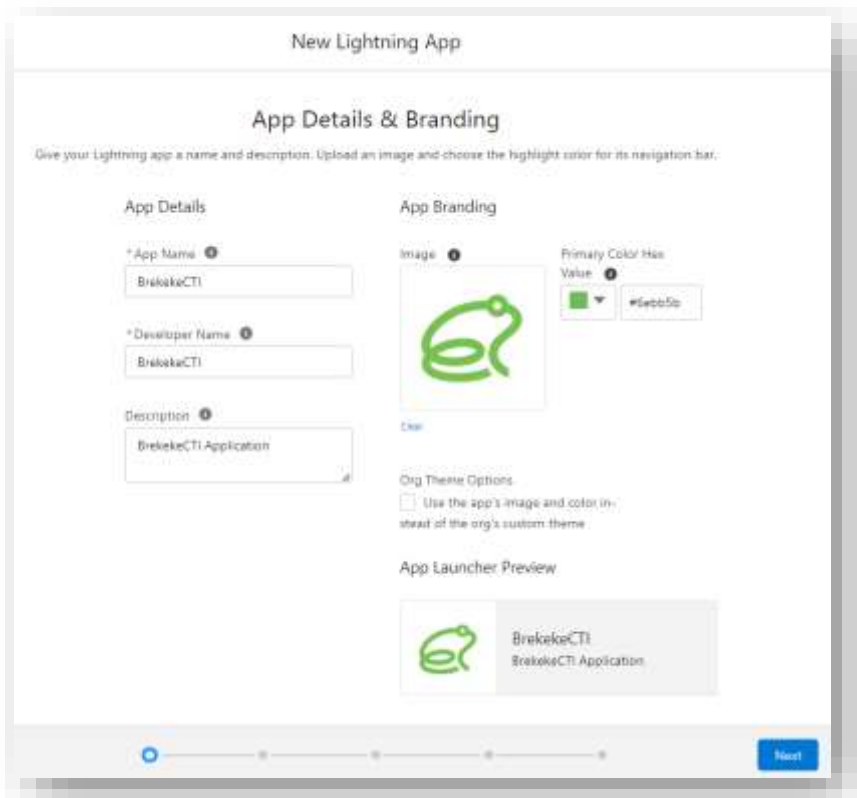
1. Integrate Brekeke PBX Widget with Salesforce

Create Lightning application

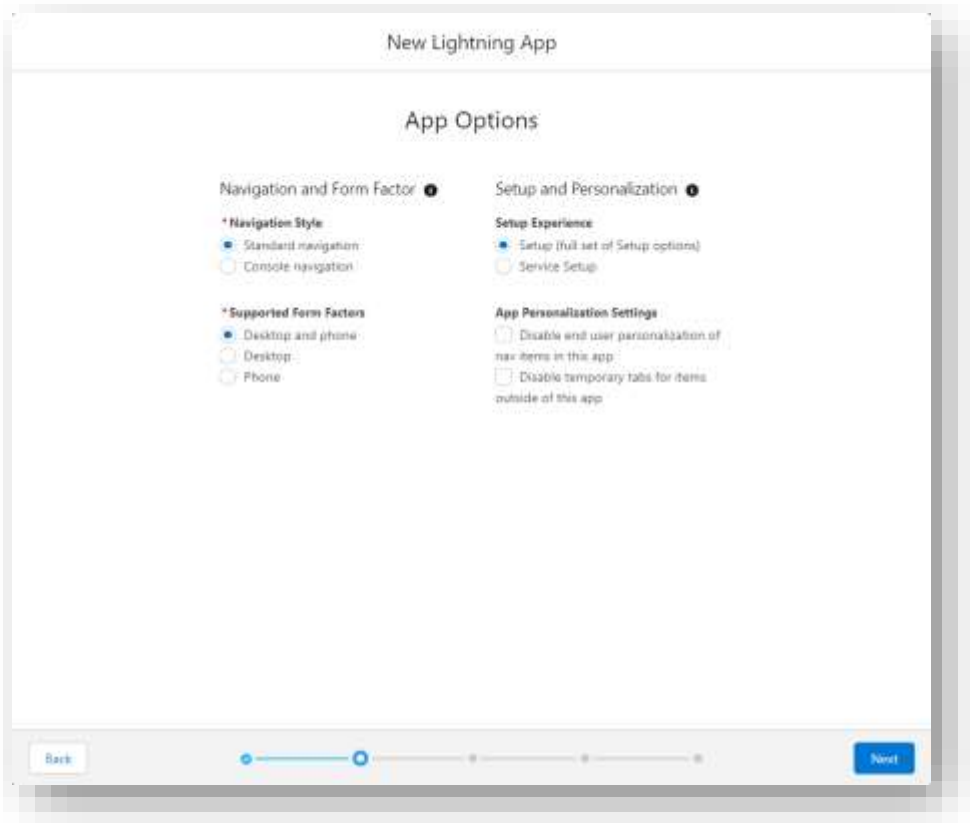
Go to setup and from Quick Find search option find “App Manager”. Add new application by clicking [New Lightning App].



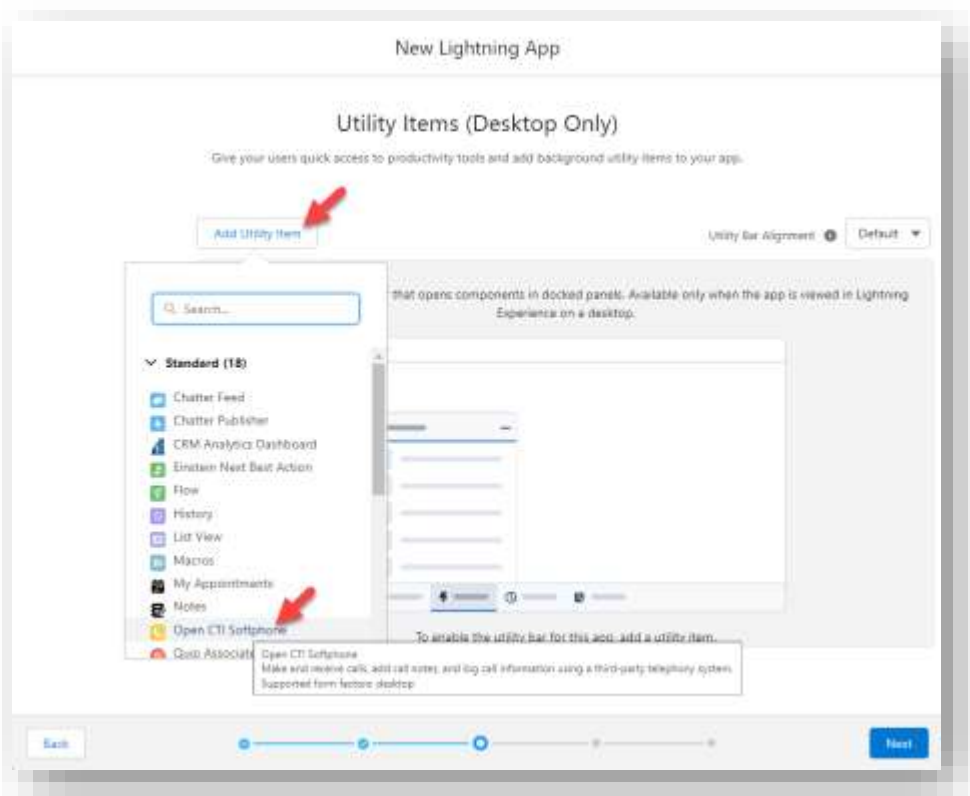
Assign AppName, Developer Name and Description.



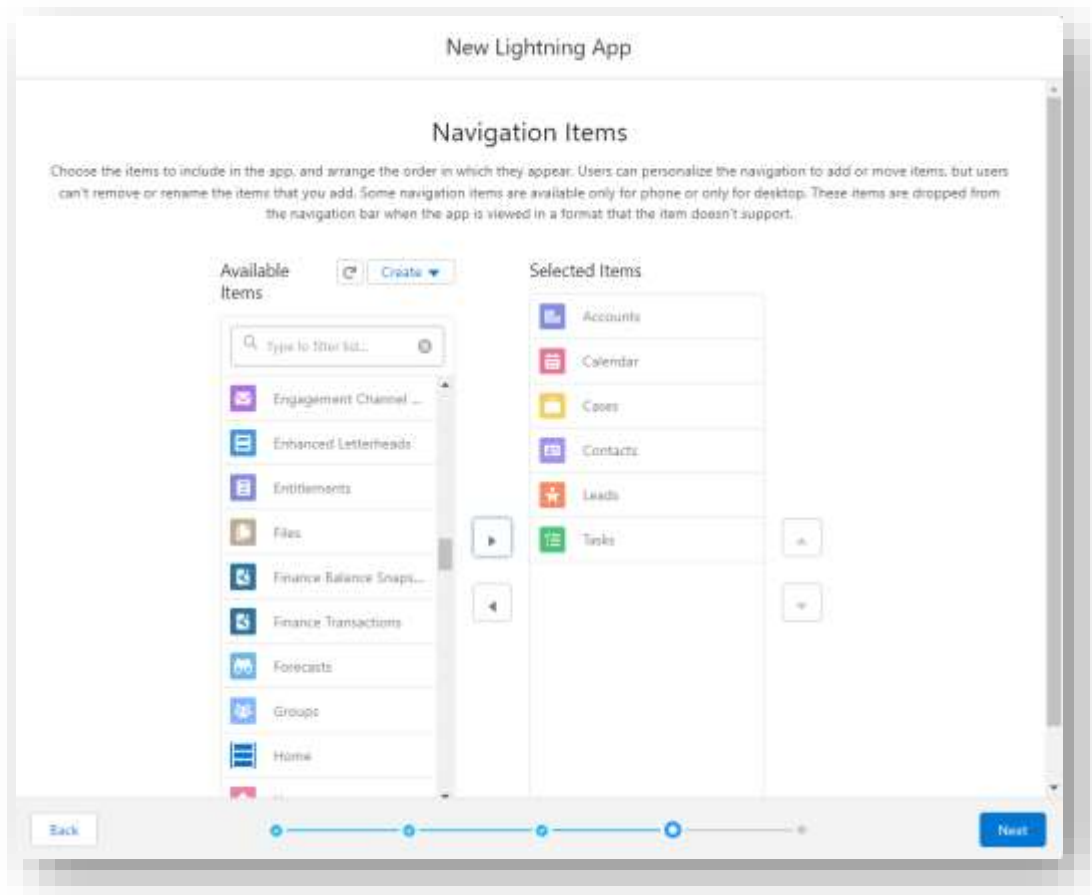
Configure the lightning app



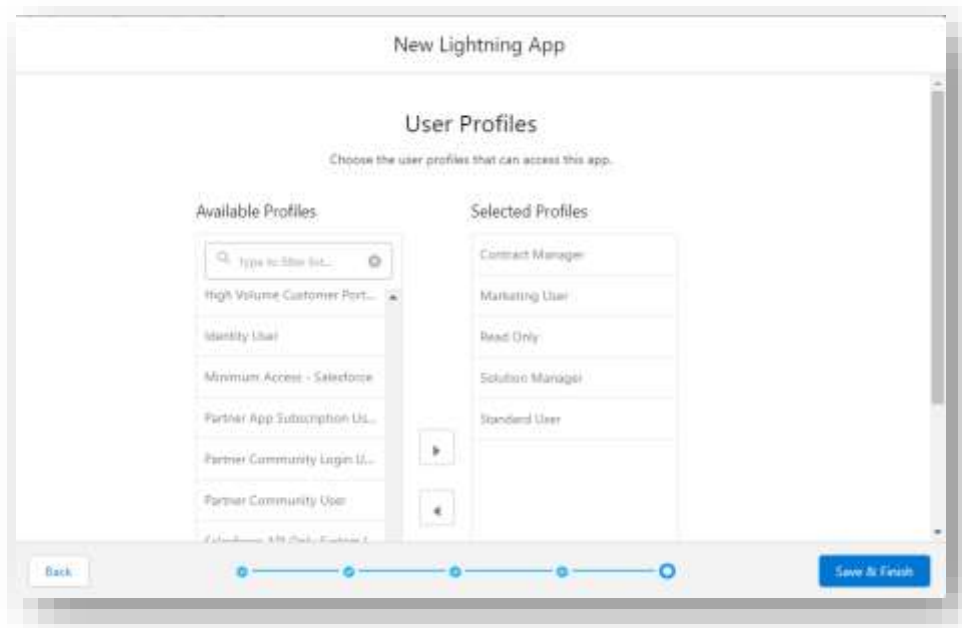
Add Utility Item and select “Open CTI softphone”.



Add required Navigation Items.



Add user profiles as per organization need.

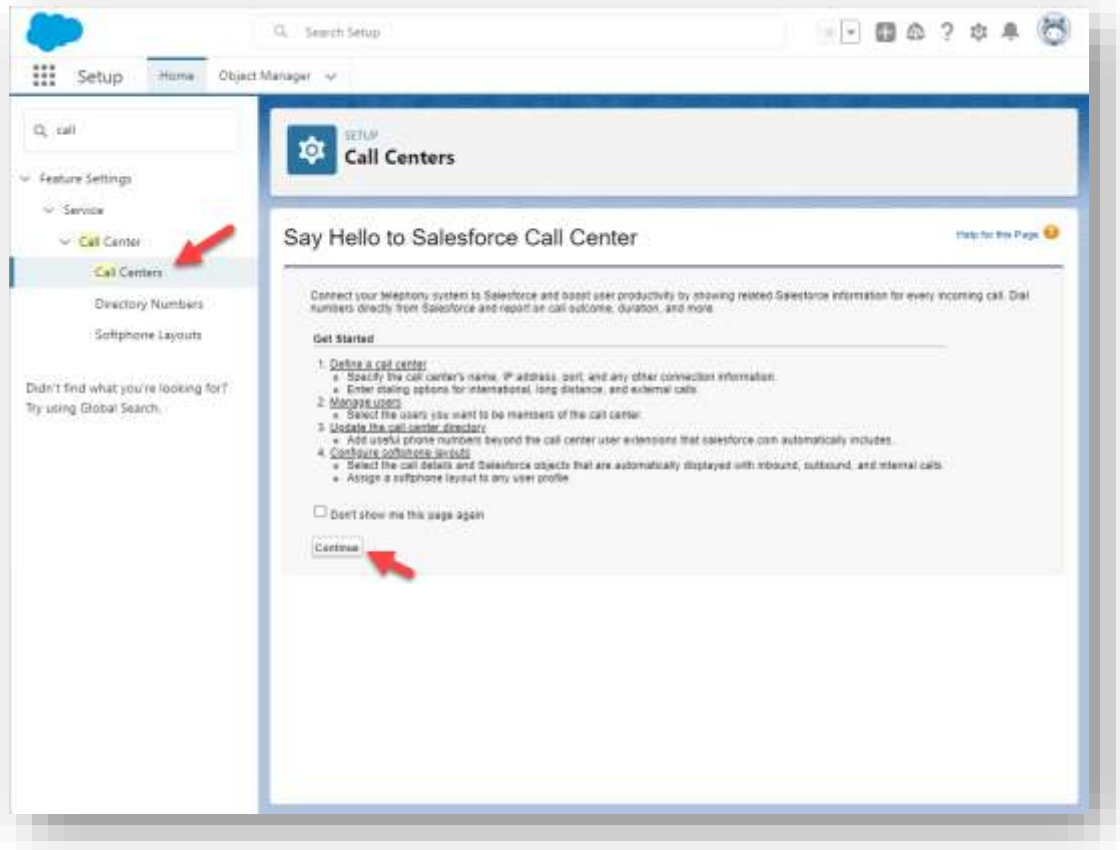


*If system administrator will test the app later, include "System Administrator".

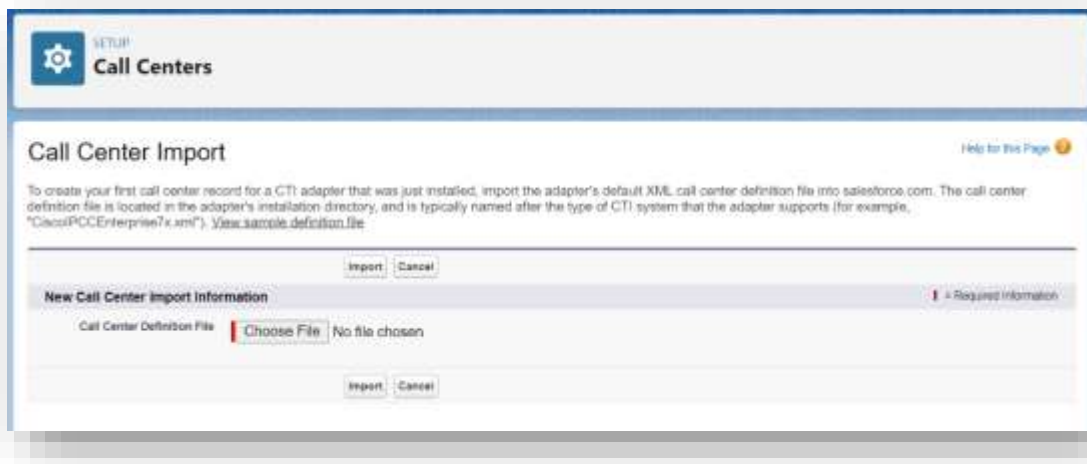
Application creation is completed.

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].

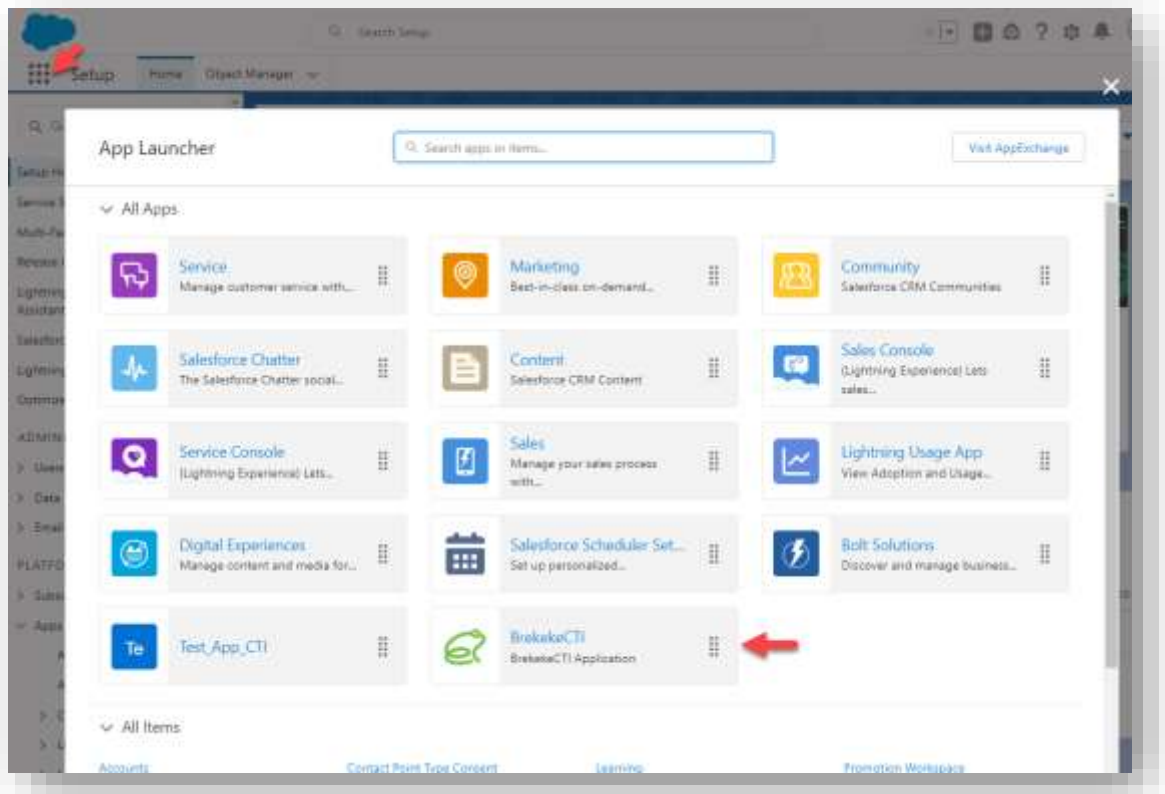
Configure Screen Pop Settings.

The screenshot displays the Salesforce Setup interface for configuring a Softphone Layout. The left sidebar shows the navigation menu with 'Softphone Layouts' selected. The main content area is titled 'Softphone Layout Edit' and includes the following sections:

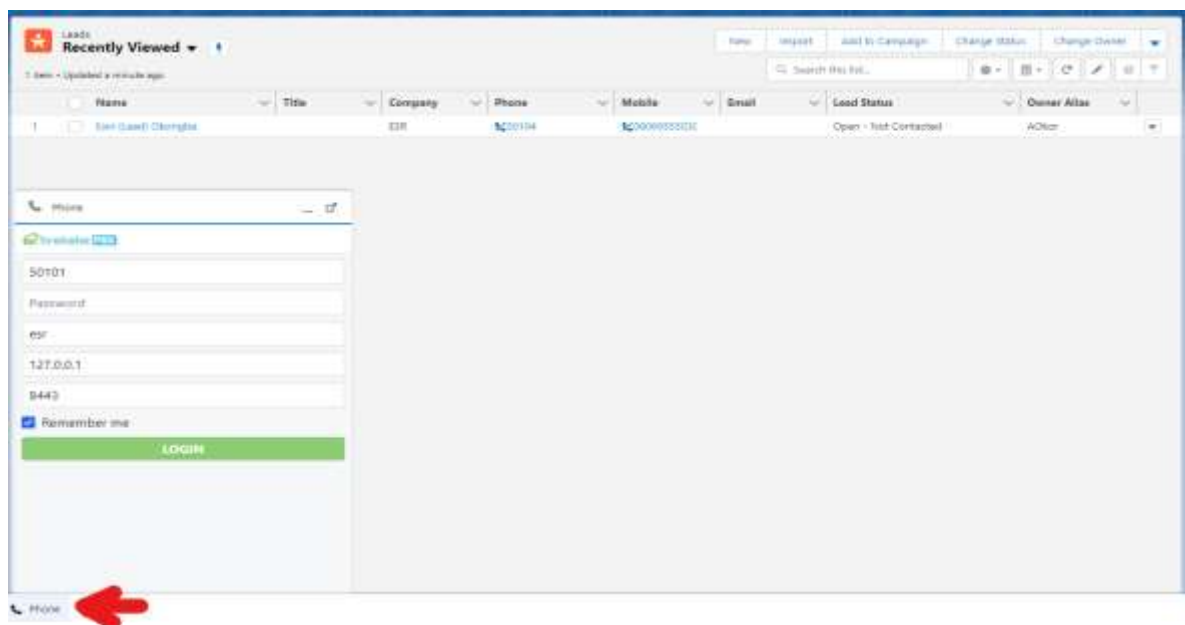
- Header:** 'Name' field is set to 'Standard softphone layout'. The 'Is Default Layout' checkbox is checked. The 'Select Call Type' dropdown is set to 'Inbound'.
- Softphone Layout:** This section contains configuration options for displaying call-related fields and Salesforce objects.
 - Display these call-related fields:** Includes 'Caller ID, Dialed Number'.
 - Display these Salesforce.com objects:** Includes 'Account, Contact, Lead'.
 - Conditional Display Rules:**
 - If single Account found, display:** Account Name
 - If single Contact found, display:** Name
 - If single Lead found, display:** Name
- Screen Pop Settings:** This section defines how screen pops are handled based on matching records.
 - Screen pops open within:** Existing browser window (selected) or New browser window or tab.
 - No matching records: Pop to new Lead:** Options include 'Don't pop any screen', 'Pop to new Lead' (selected), 'Pop to Visualforce page', and 'Pop to flow'.
 - Single-matching record: Pop detail page:** Options include 'Don't pop any screen', 'Pop detail page' (selected), 'Pop to Visualforce page', and 'Pop to flow'.
 - Multiple-matching records: Pop to search page:** Options include 'Don't pop any screen', 'Pop to search page' (selected), 'Pop to Visualforce page', and 'Pop to flow'.

Log in Salesforce CRM and check CTI

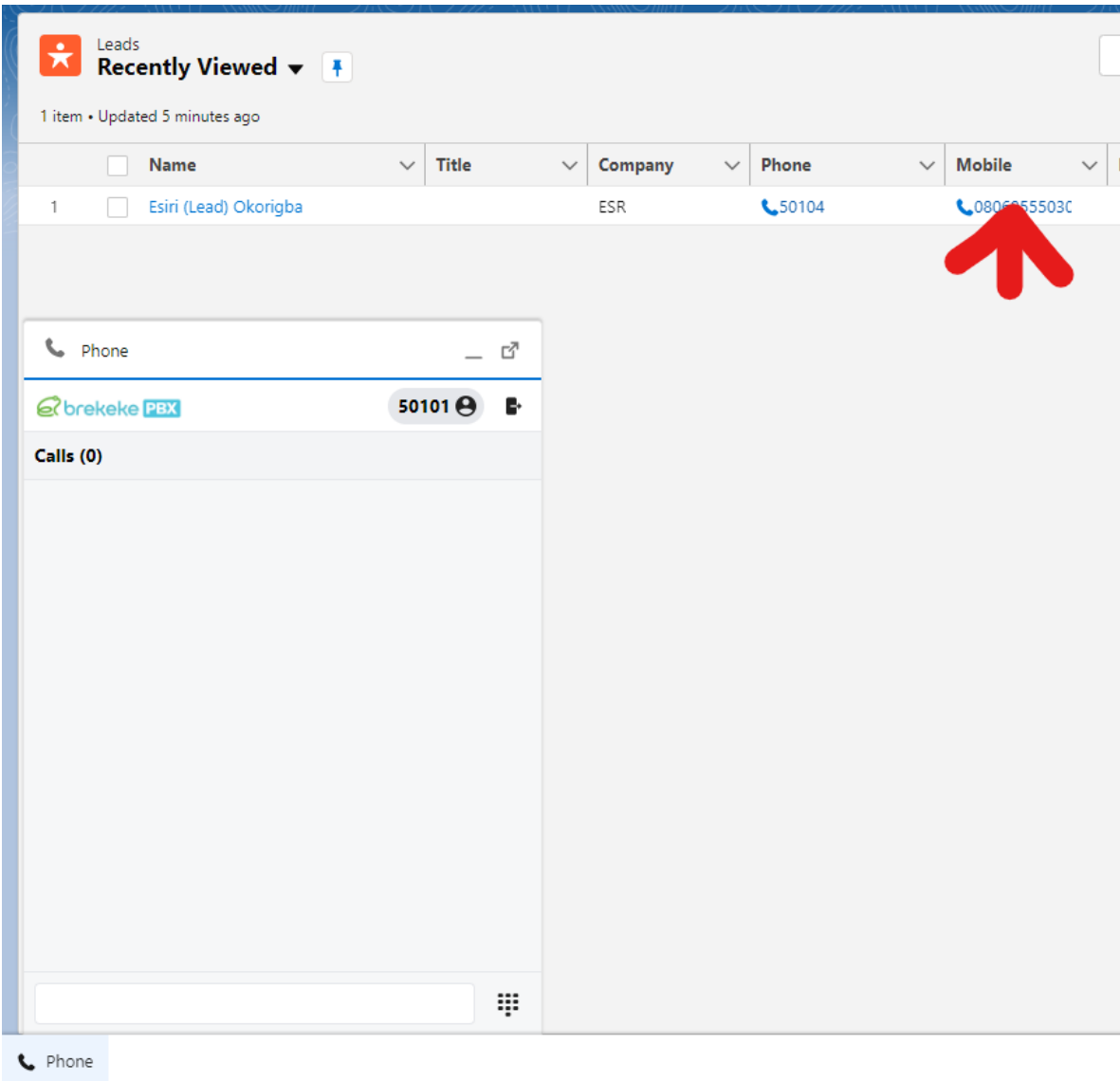
- 1) Log in salesforce CRM and at [App Launcher], select the application you created.



- 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.



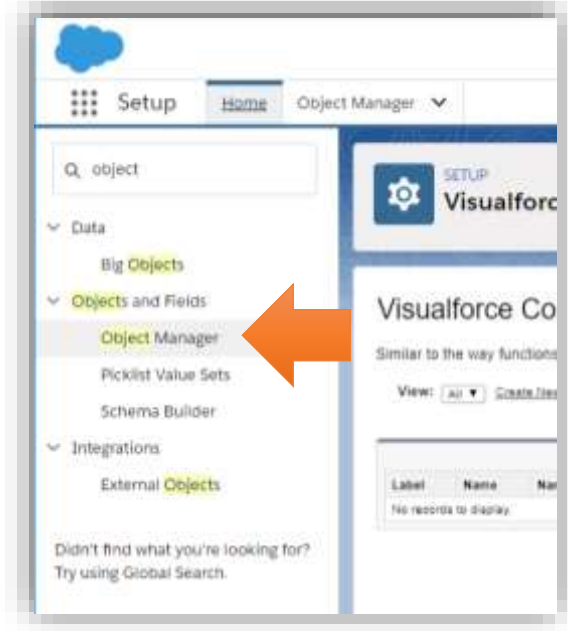
Reference Salesforce.com "Lightning Open CTI"

(https://developer.salesforce.com/page/Lightning_Open_CTI)

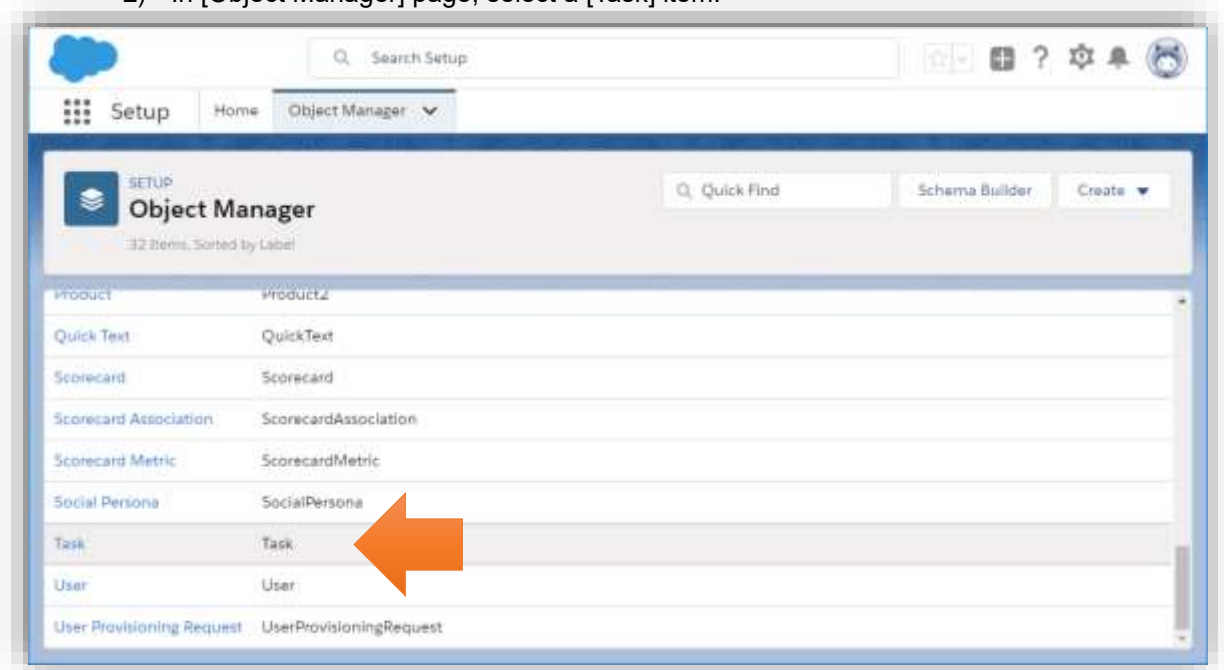
Setup for links of recording files

Create a link object at Salesforce CRM.

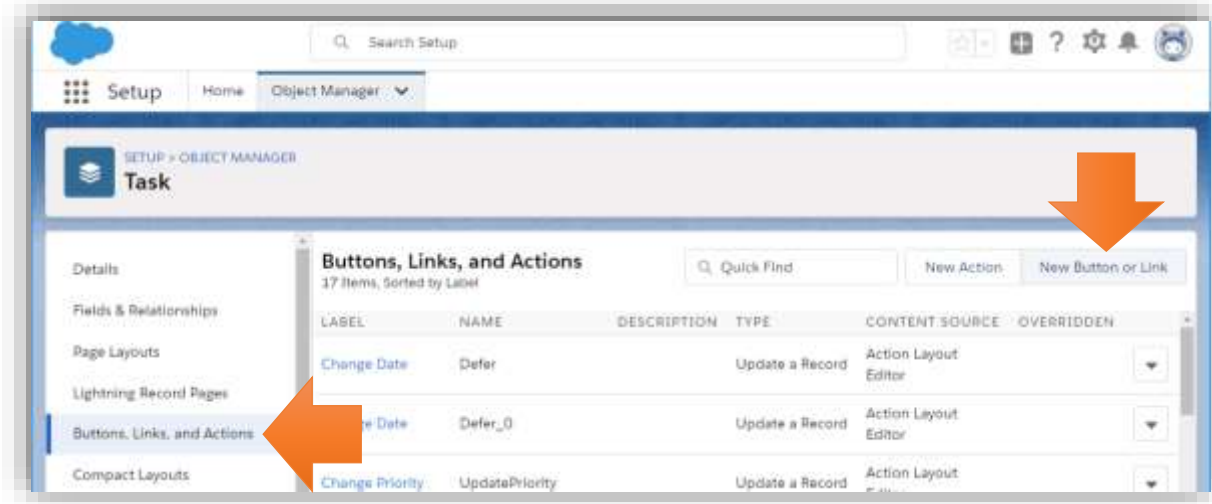
- 1) Move to [Object and Fields] > [Object Manager].



- 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.

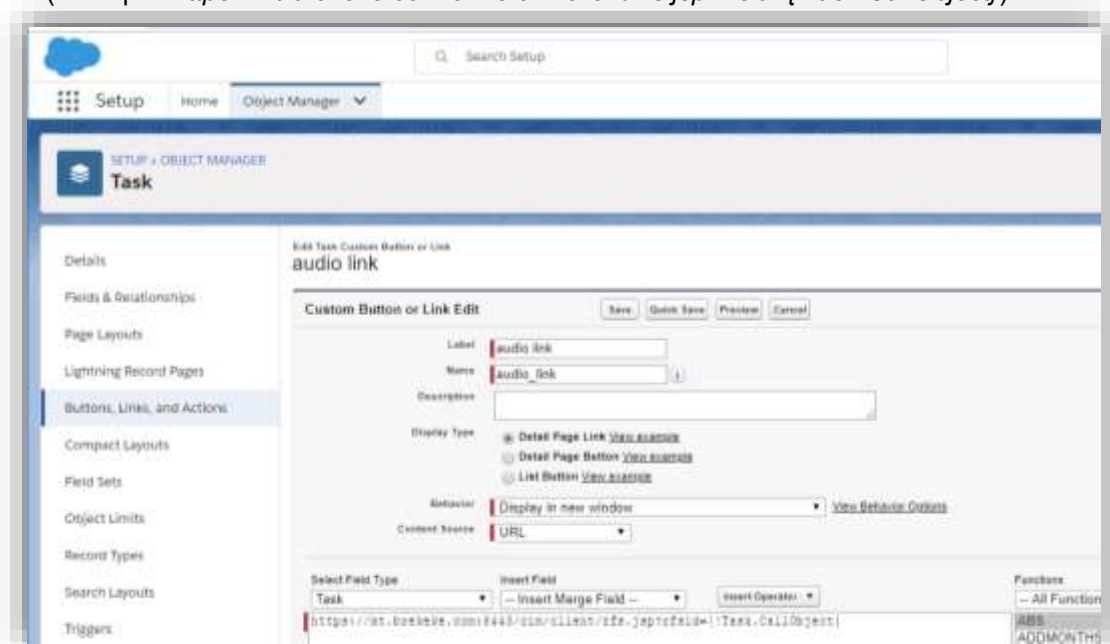


4) Edit the details as follows and save it.

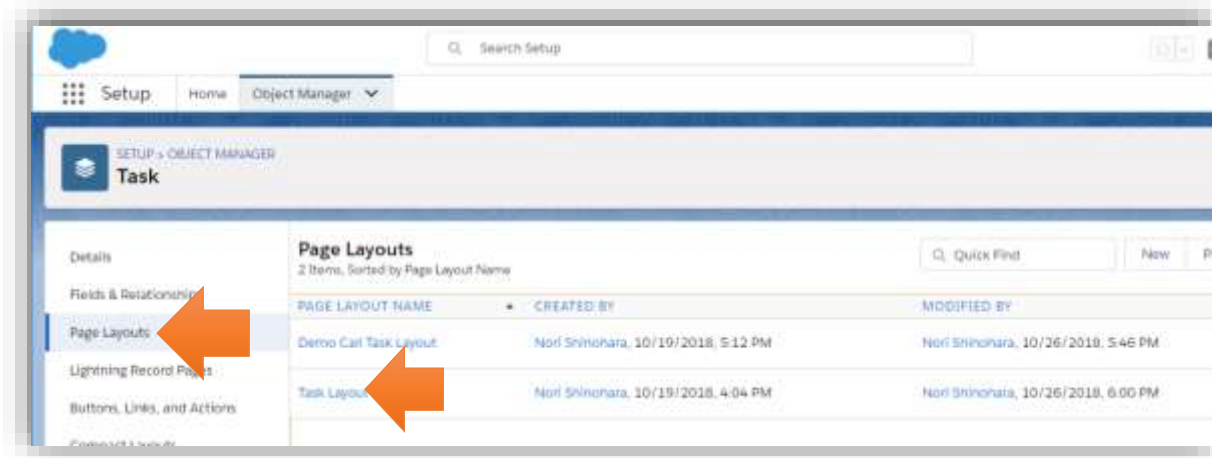
- Label : Any label (Example: *audio link*)
- Name : Any name (Example: *audio link*)
- Display Type : “Detail Page Link”
- Behavior : “Display in new window”
- Content Source : “URL”
- Select Field Type : “Task”
- URL:

`https://<your_brekeke_cim_host_address>:<port> /cim/client/rfs.jsp?rfsid={!Task.CallObject}`

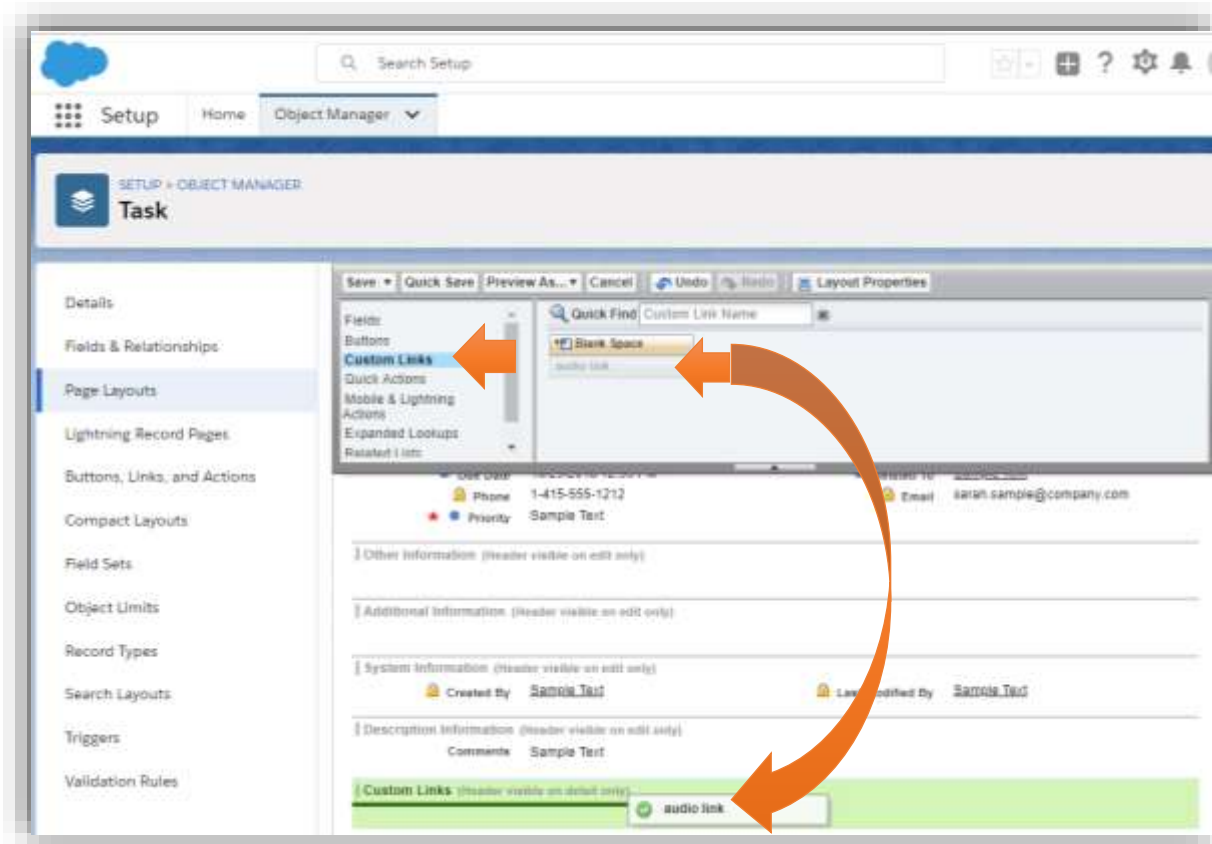
(Example: `https://mt.brekeke.com:8443/cim/client/rfs.jsp?rfsid={!Task.CallObject}`)



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

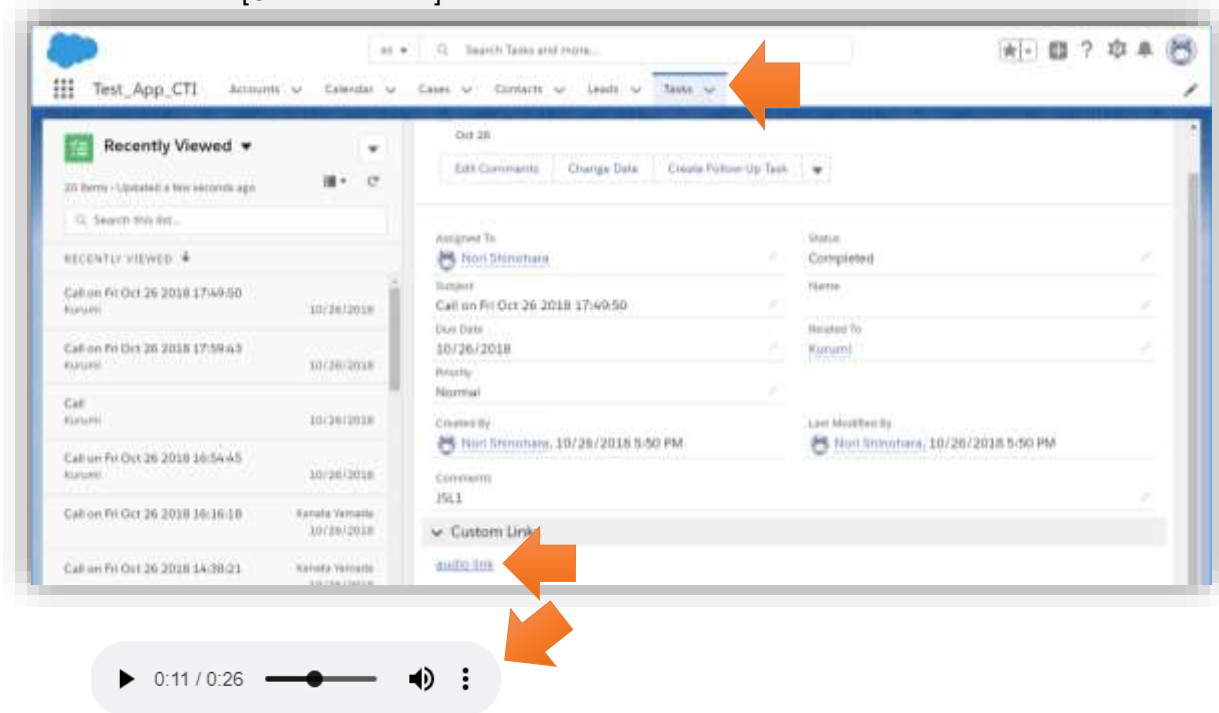


- 6) Select [Custom Links] menu, then drag the “audio link” object that was created in previous steps and drop it in the [Custom Links] section.



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)