Brekeke PBX

CTI for Salesforce Lightning

Quick Setup Guide

Version 2.7

Brekeke Software, Inc.

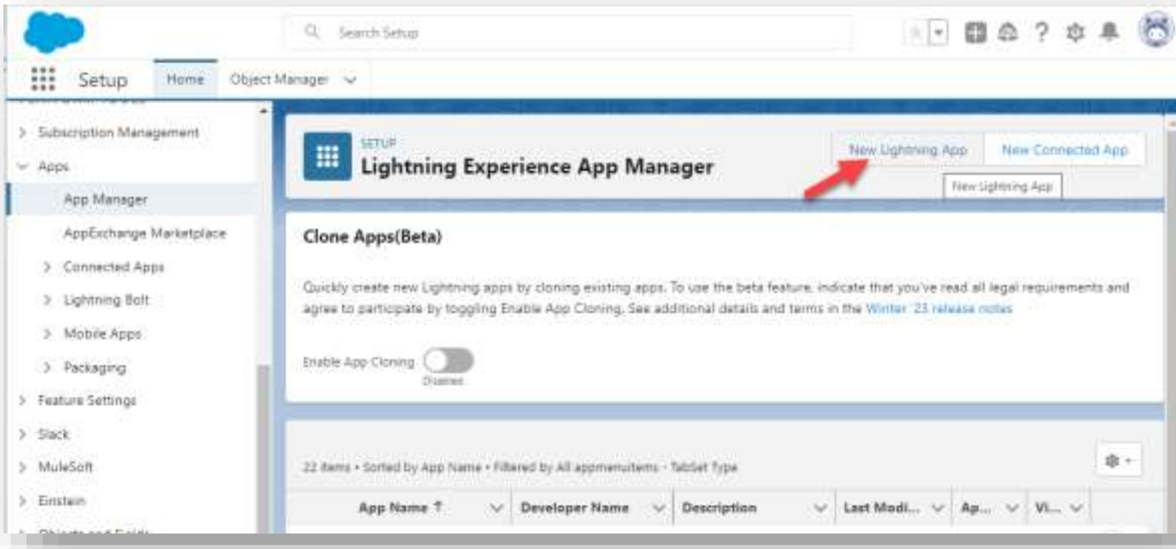
Version

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

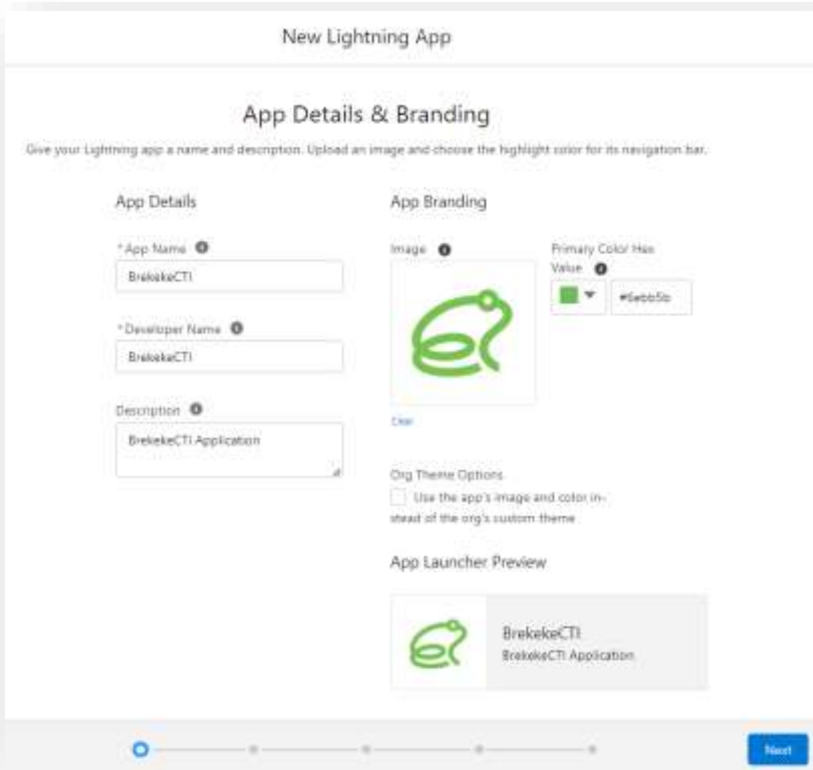
1. Integrate Brekeke PBX Widget with Salesforce

Create Lightning application

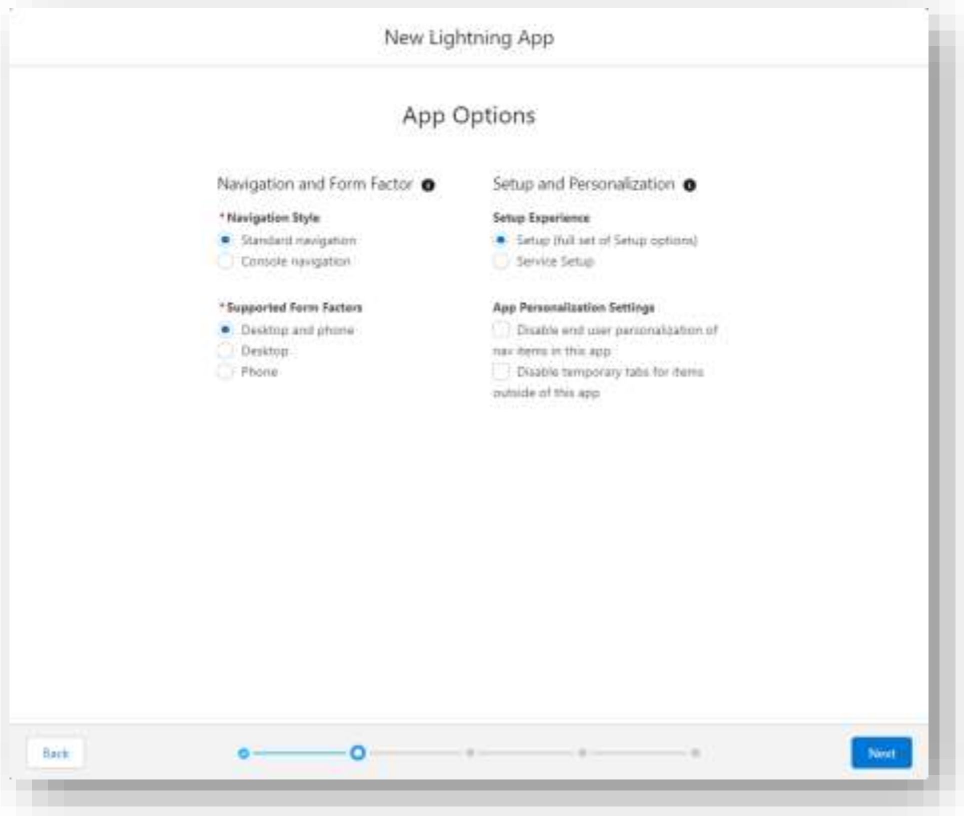
Go to setup and from Quick Find search option find “App Manager”. Add new application by clicking [New Lightning App].



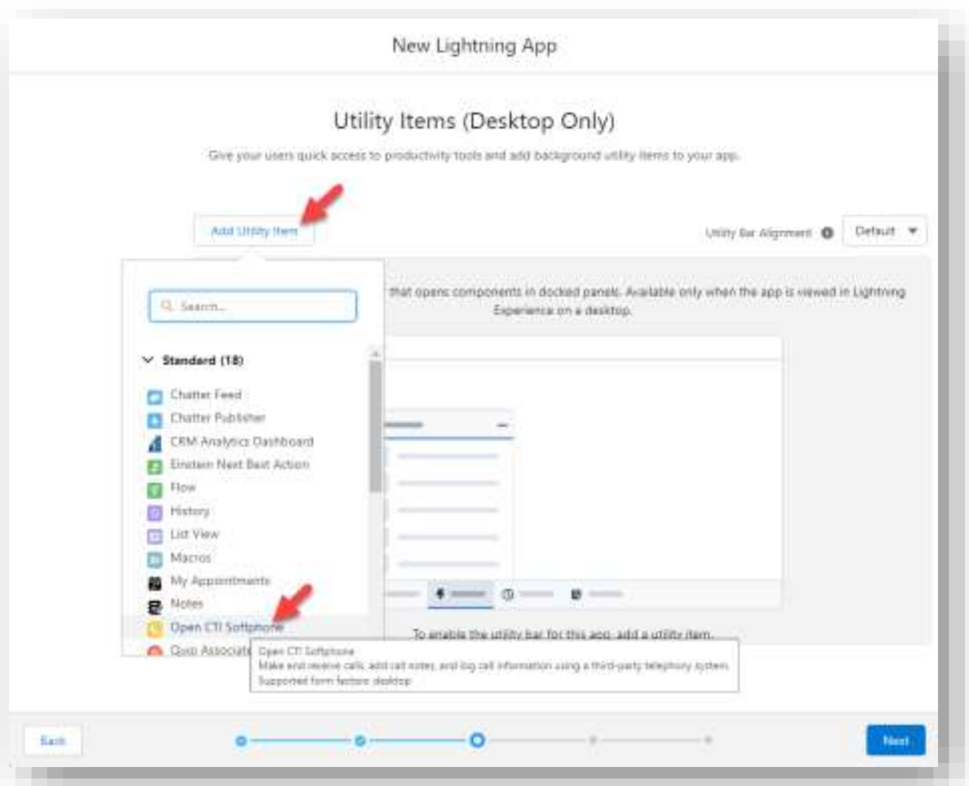
Assign AppName, Developer Name and Description.



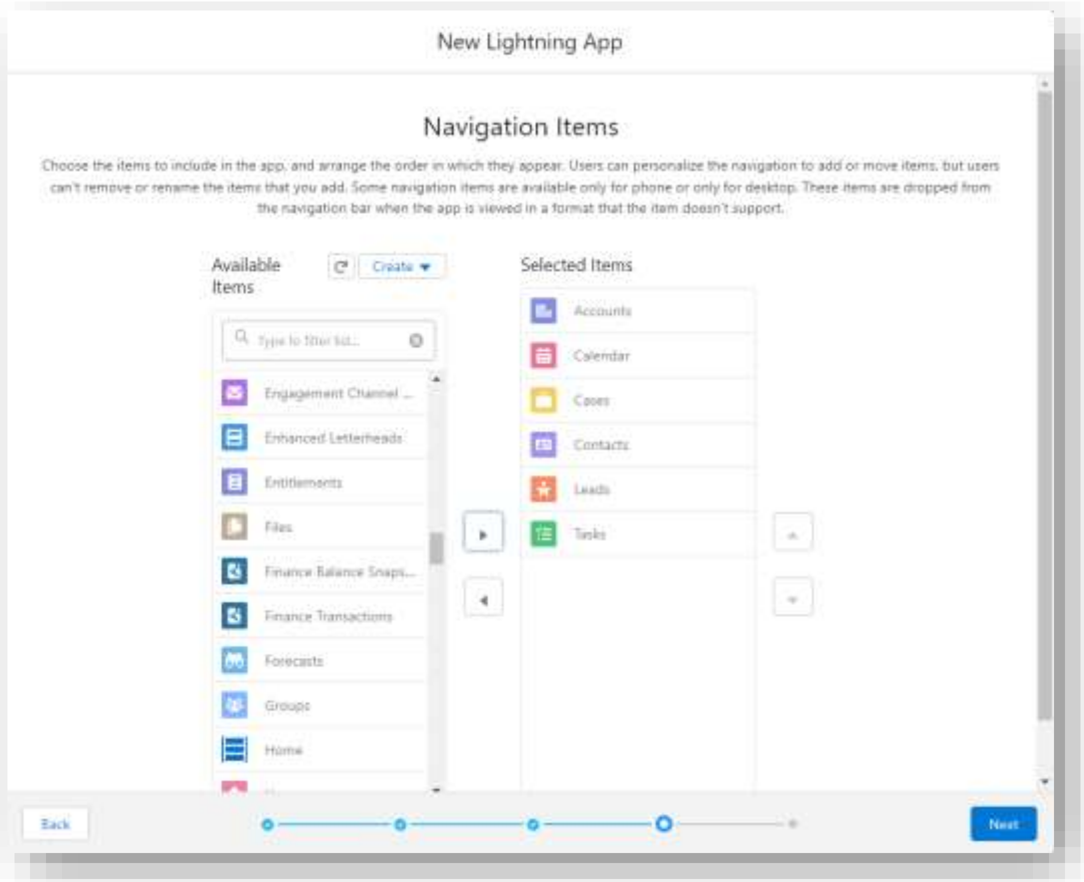
Configure the lightning app



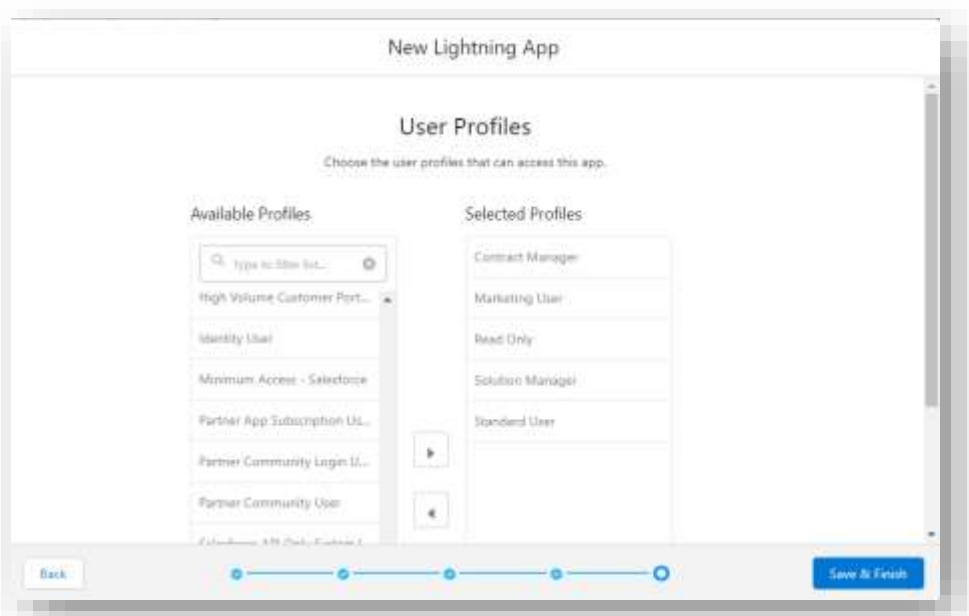
Add Utility Item and select “Open CTI softphone”.



Add required Navigation Items.



Add user profiles as per organization need.

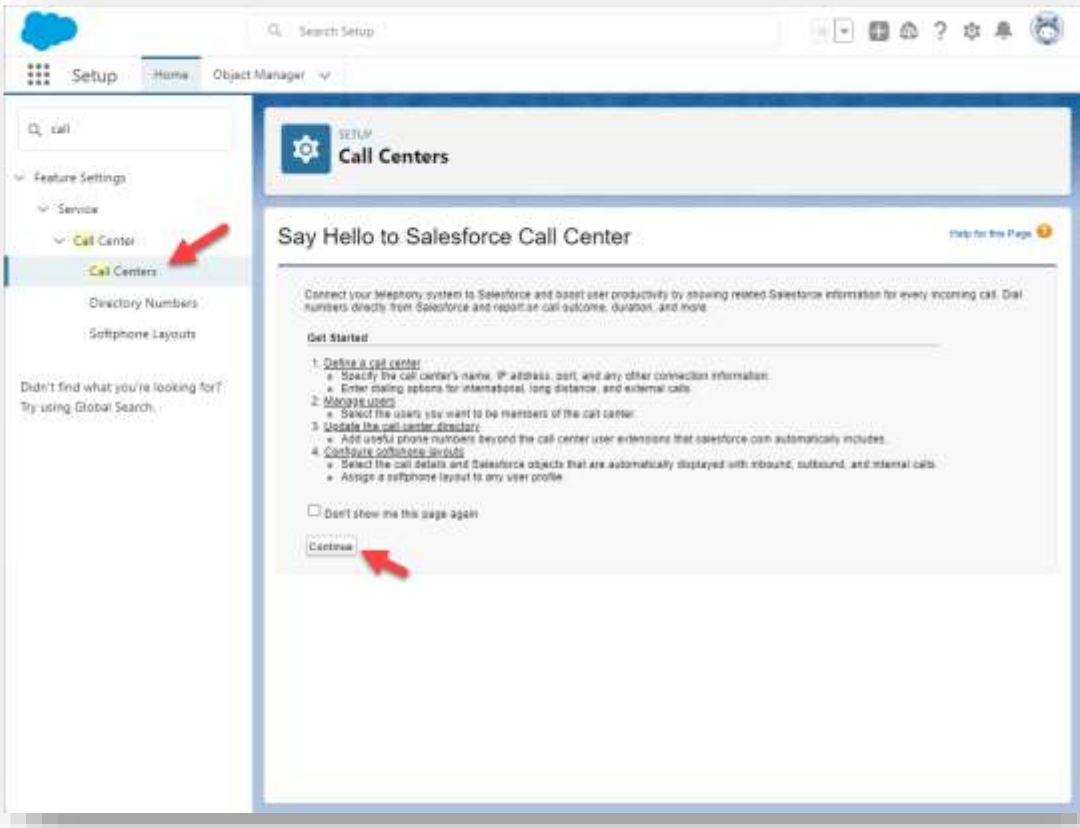


*If system administrator will test the app later, include “System Administrator”.

Application creation is completed.

Configure Call Center Service

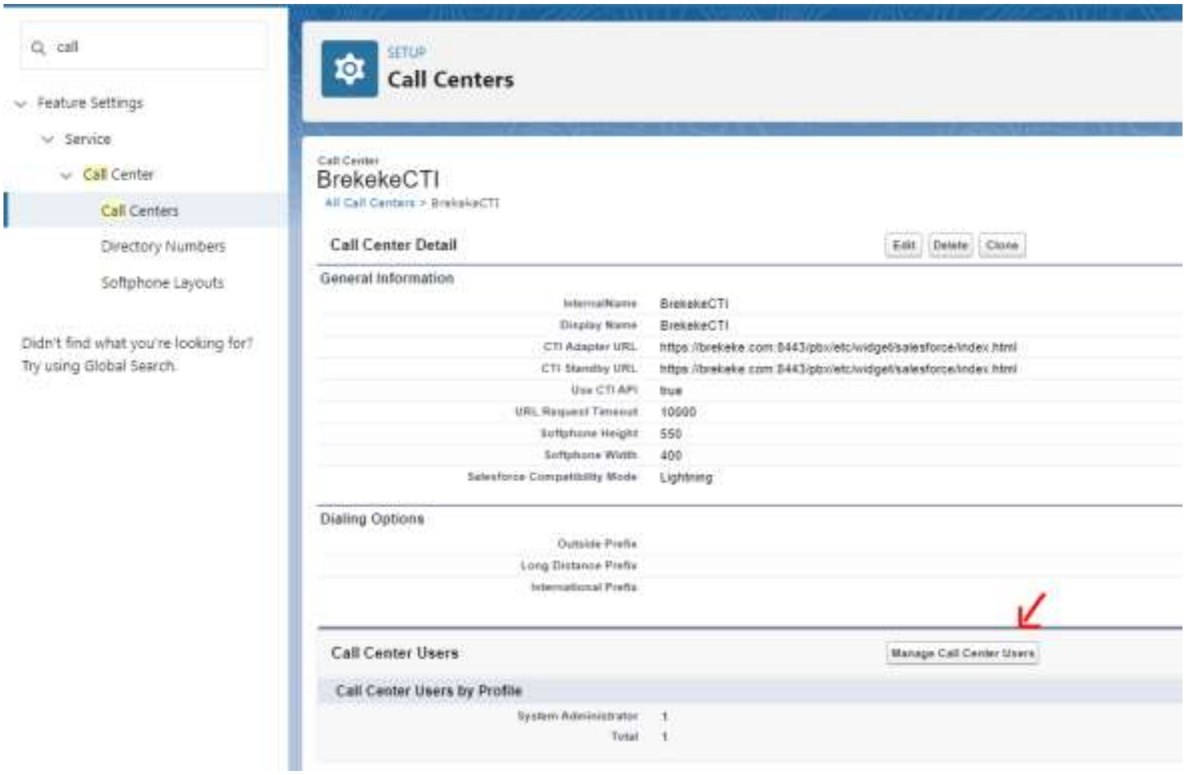
Select [Call Centers] from the quick find menu.



Import the “BrekekeCallcenter.xml” file.

Change the value of [CTI Adapter URL] and [CTI Standby URL] fields for your environment.

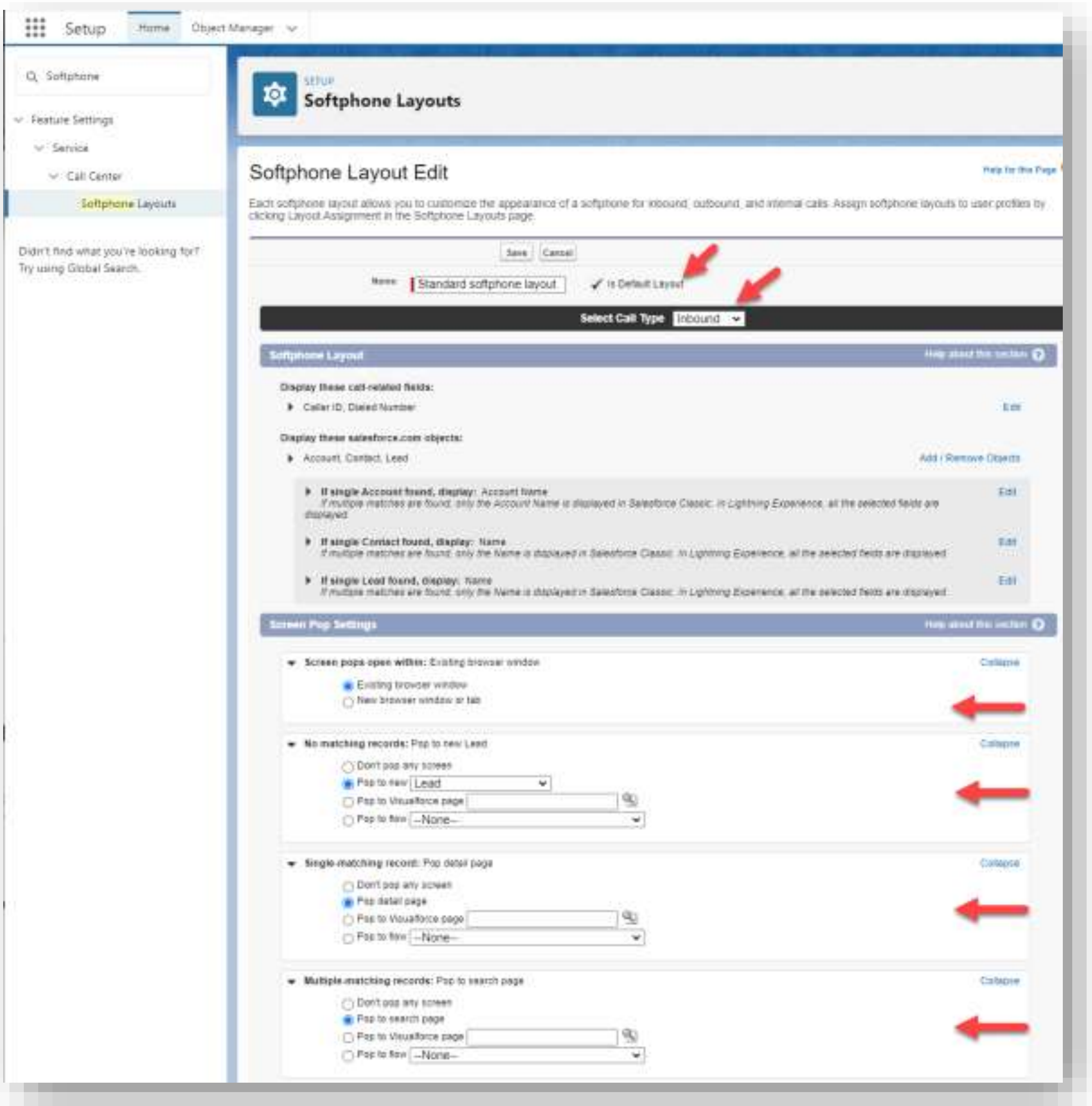
Then click Manage Call Center User to add users.



Configure Softphone Layout

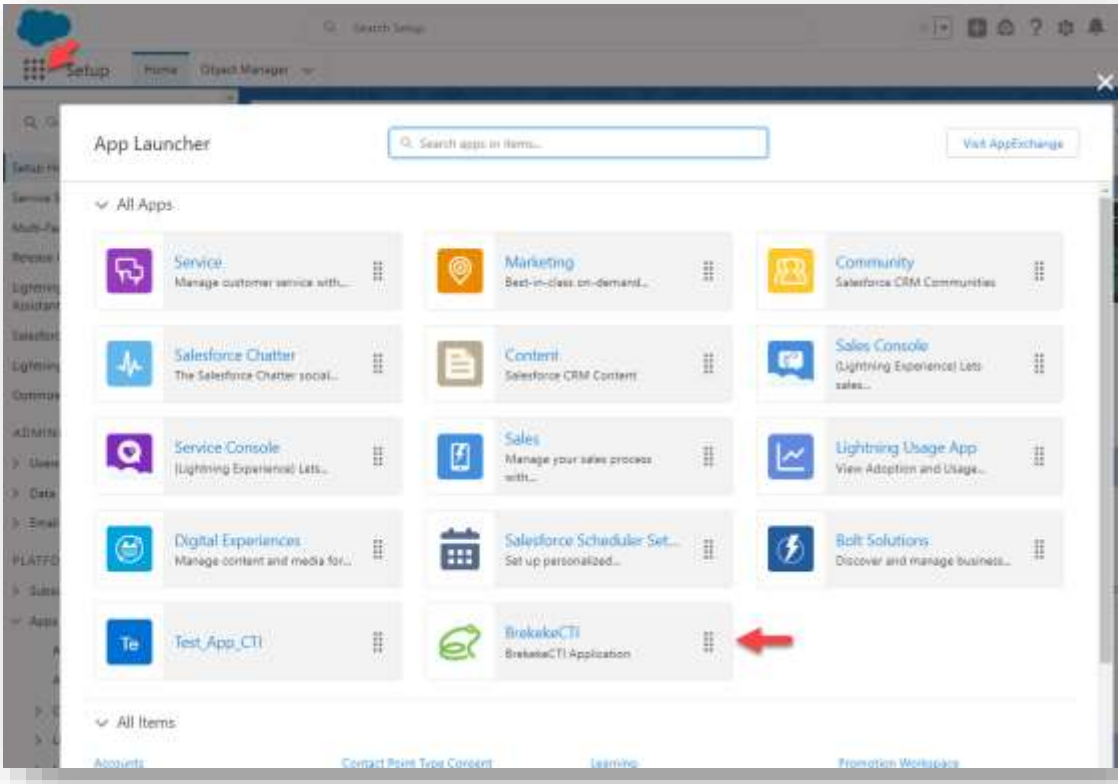
Go to setup and from Quick Find search option find “Softphone Layout”. Add new Softphone Layout by the “New” button.
Check the [is Default Layout] check box.
Select “Inbound” at the [Select Call Type].

Configure Screen Pop Settings.

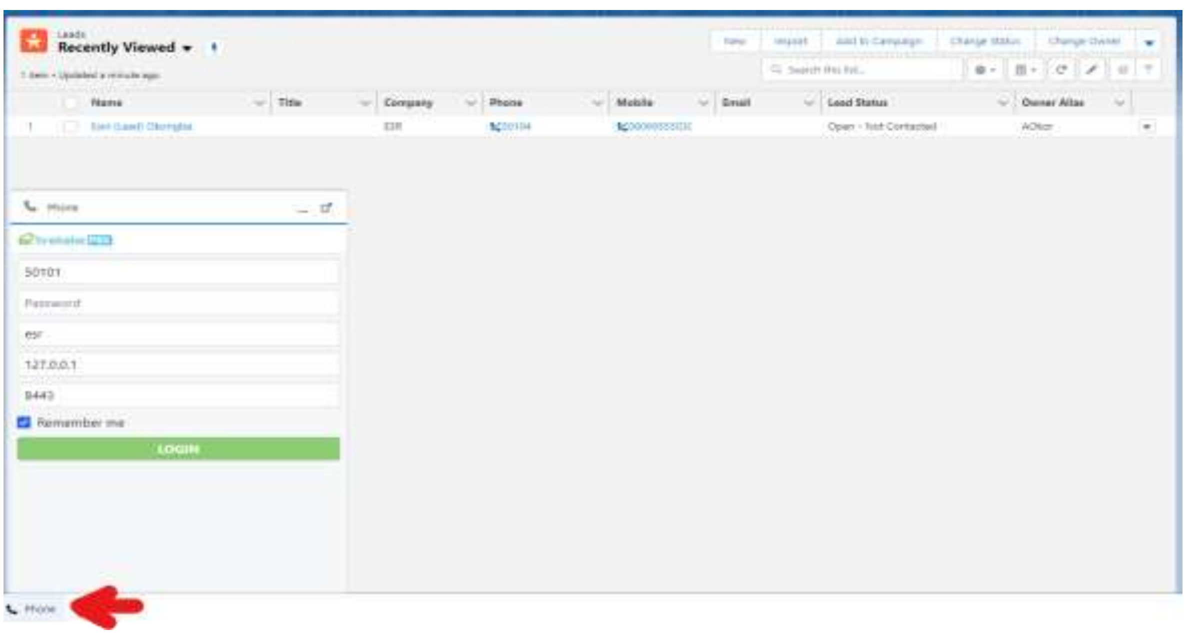


Log in Salesforce CRM and check CTI

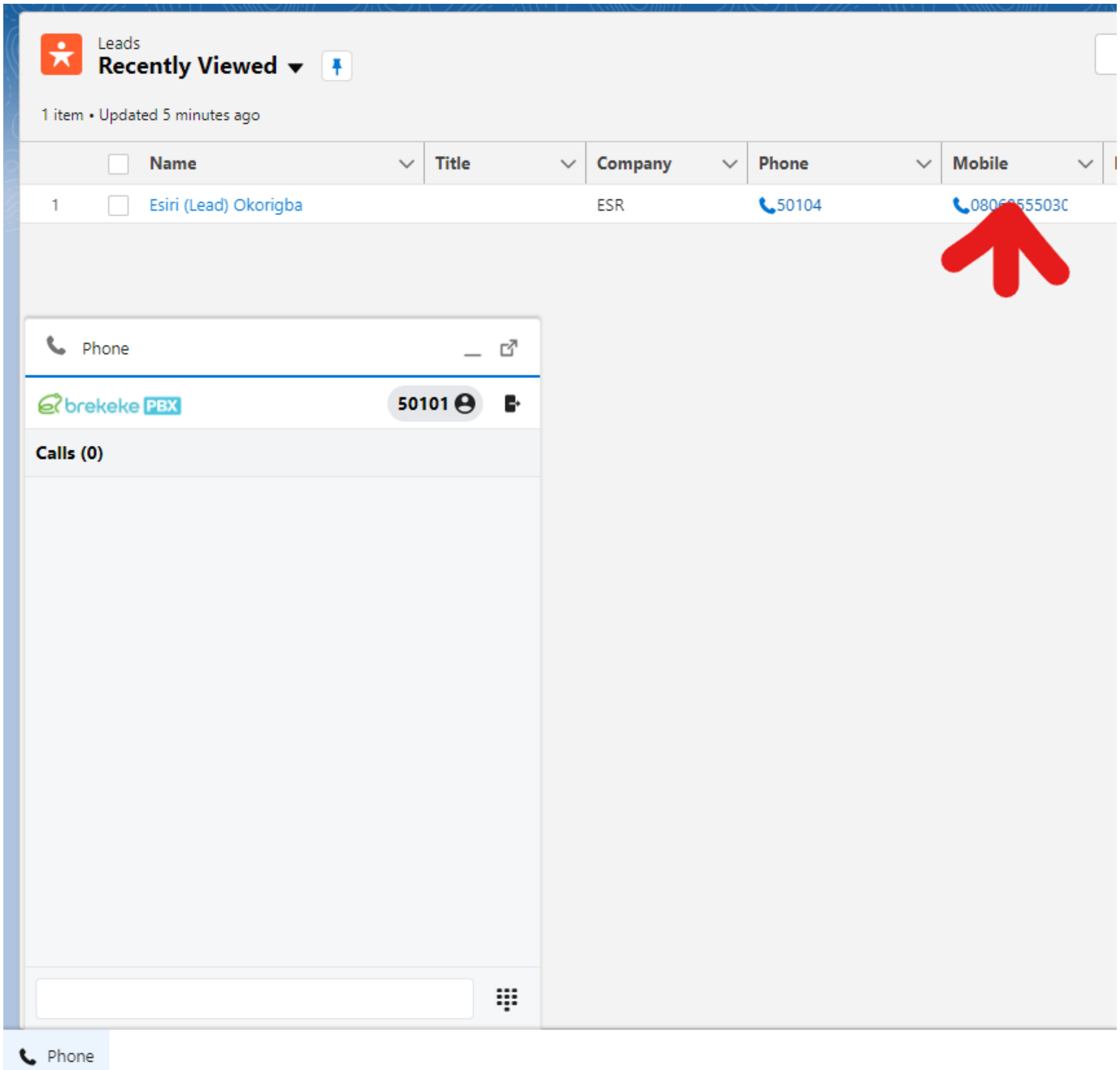
1) Log in salesforce CRM and at [App Launcher], select the application you created.



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.

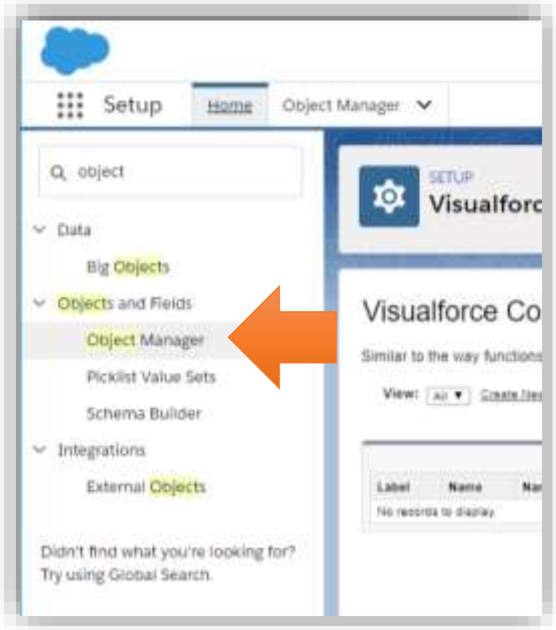


Reference Salesforce.com "Lightning Open CTI"
(*https://developer.salesforce.com/page/Lightning_Open_CTI*)

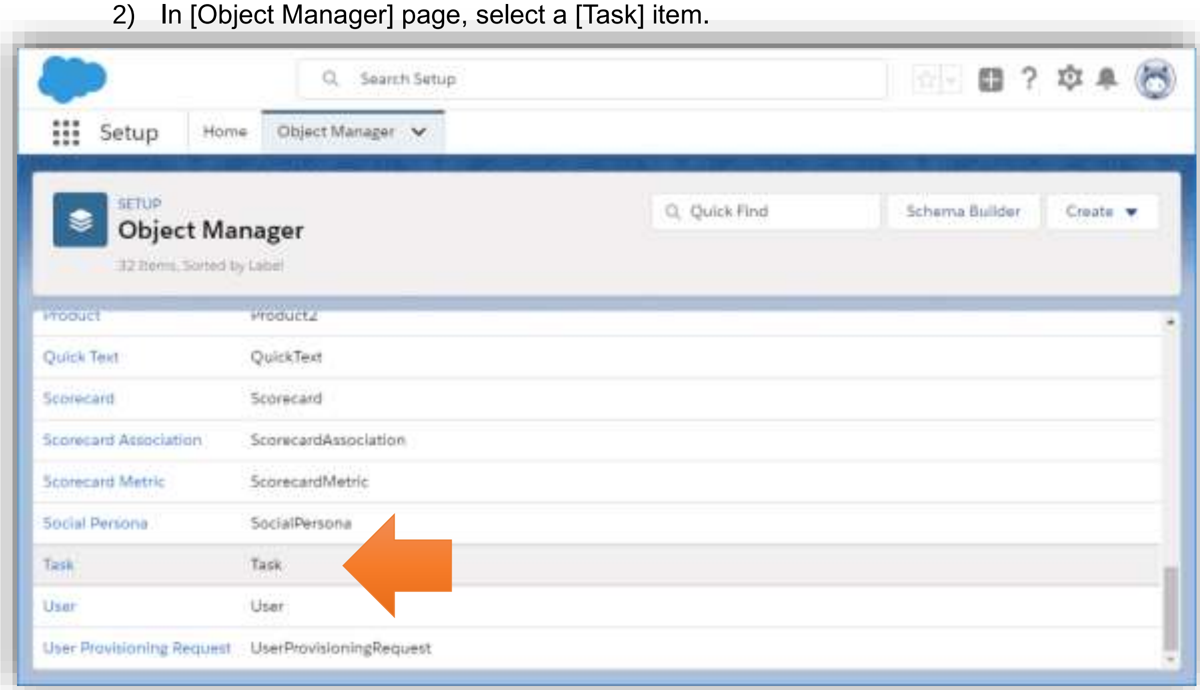
Setup for links of recording files

Create a link object at Salesforce CRM.

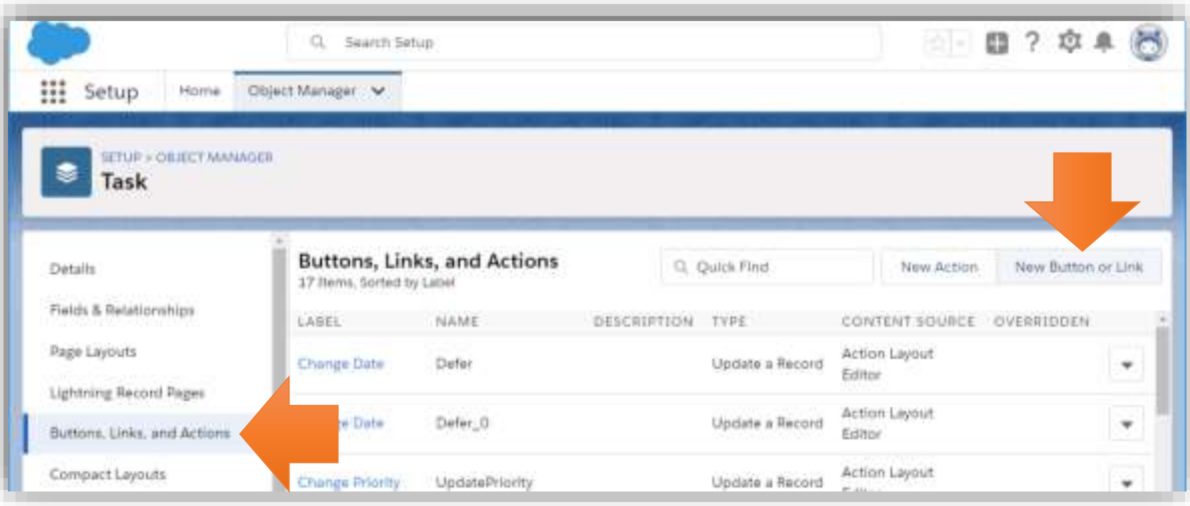
1) Move to [Object and Fields] > [Object Manager].



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.

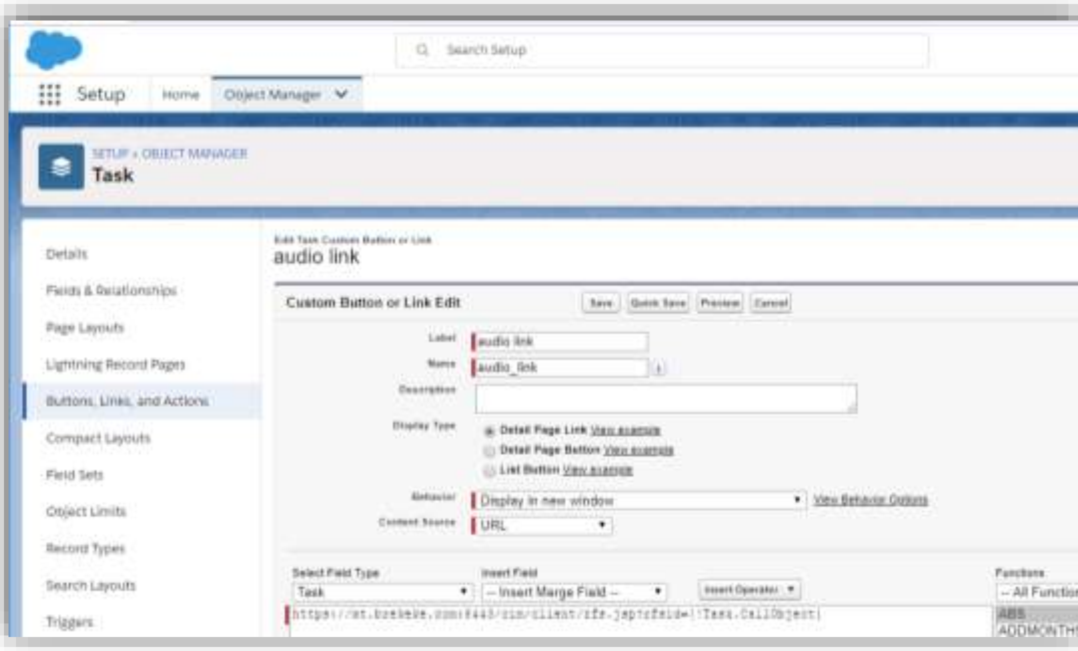


4) Edit the details as follows and save it.

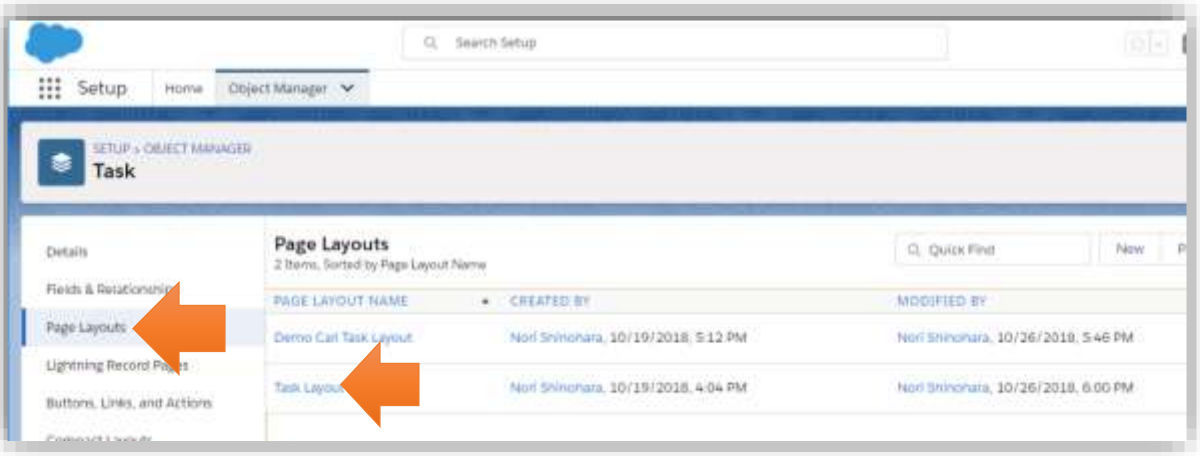
- Label : Any label (Example: *audio link*)
- Name : Any name (Example: *audio link*)
- Display Type : "*Detail Page Link*"
- Behavior : "*Display in new window*"
- Content Sourse : "*URL*"
- Select Field Type :"*Task*"
- URL:

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

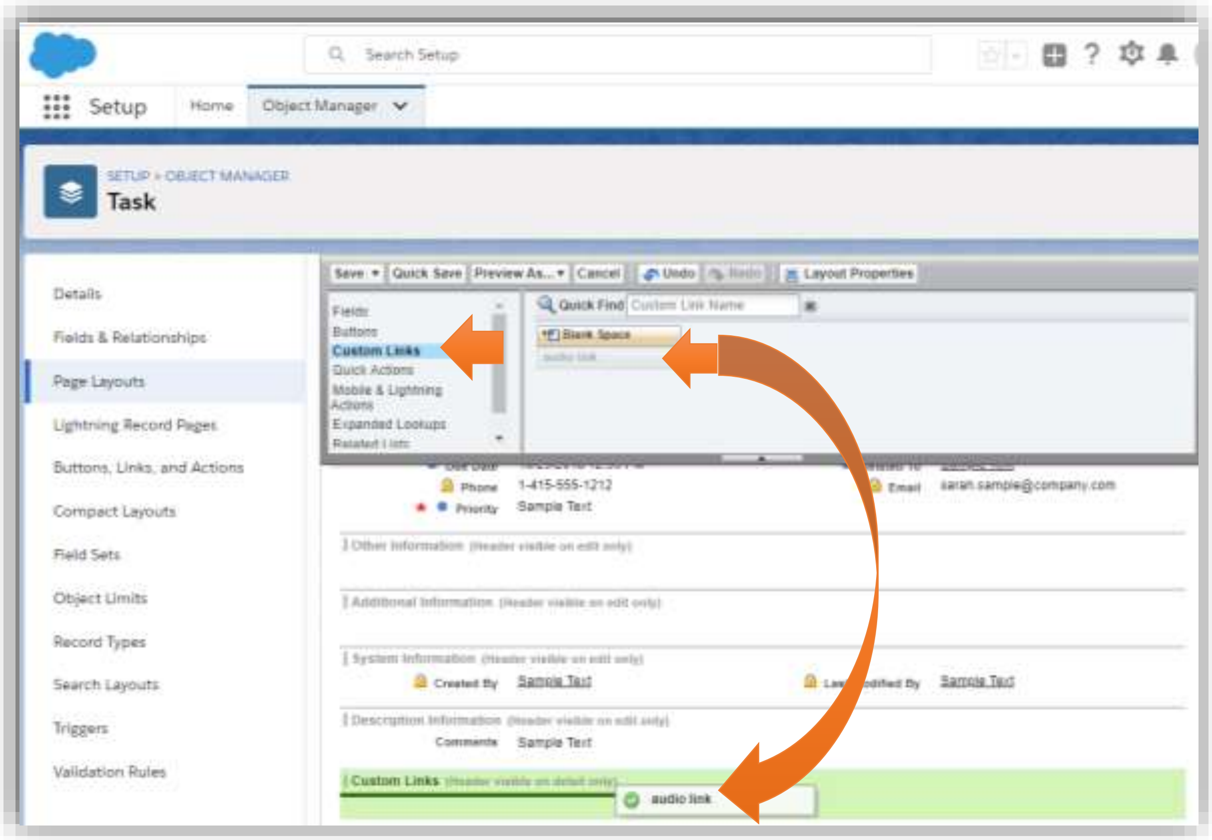
(Example: *https://mt.brekeke.com:8443/cim/client/rfs.jsp?rfsid={!Task.CallObject}*)



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

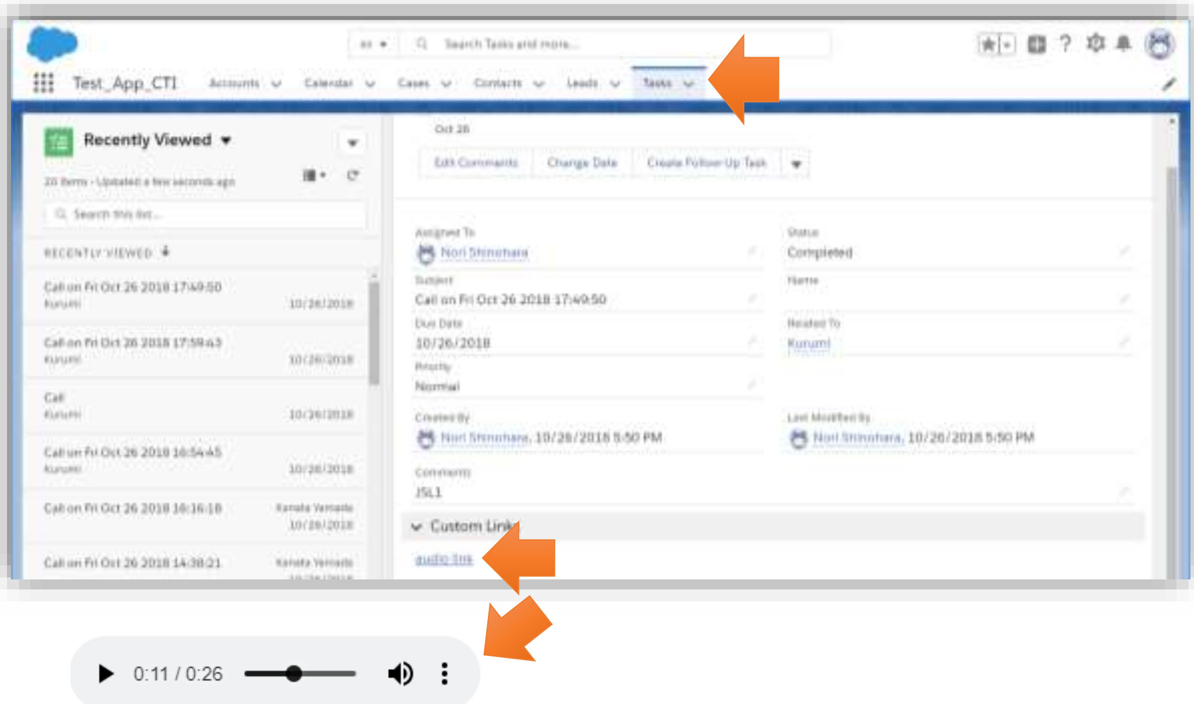


6) Select [Custom Links] menu, then drag the "audio link" object that was created in previous steps and drop it in the [Custom Links] section.



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)