**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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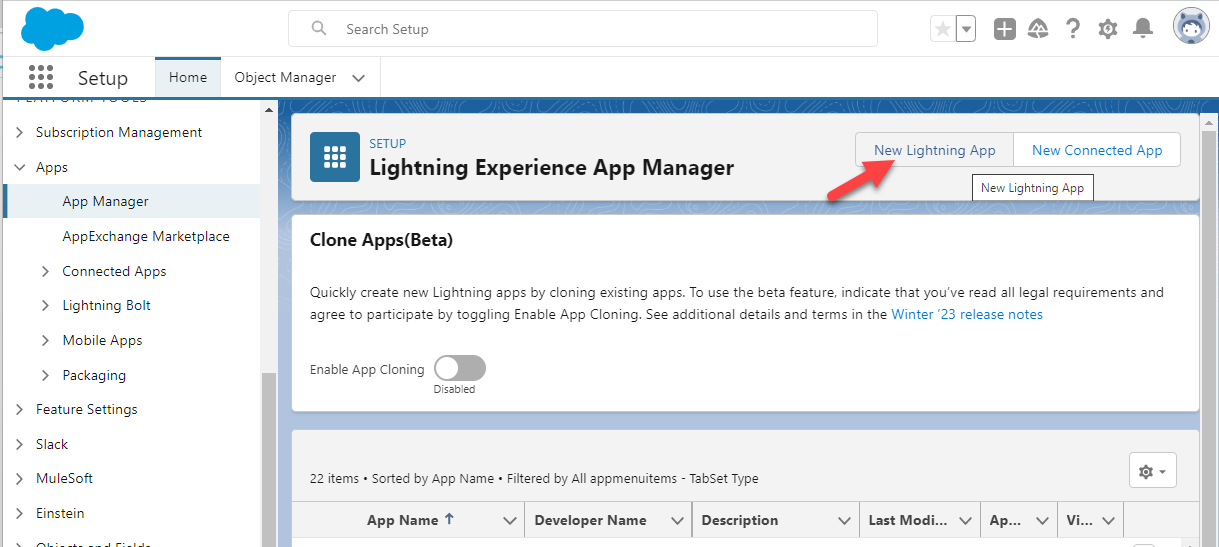
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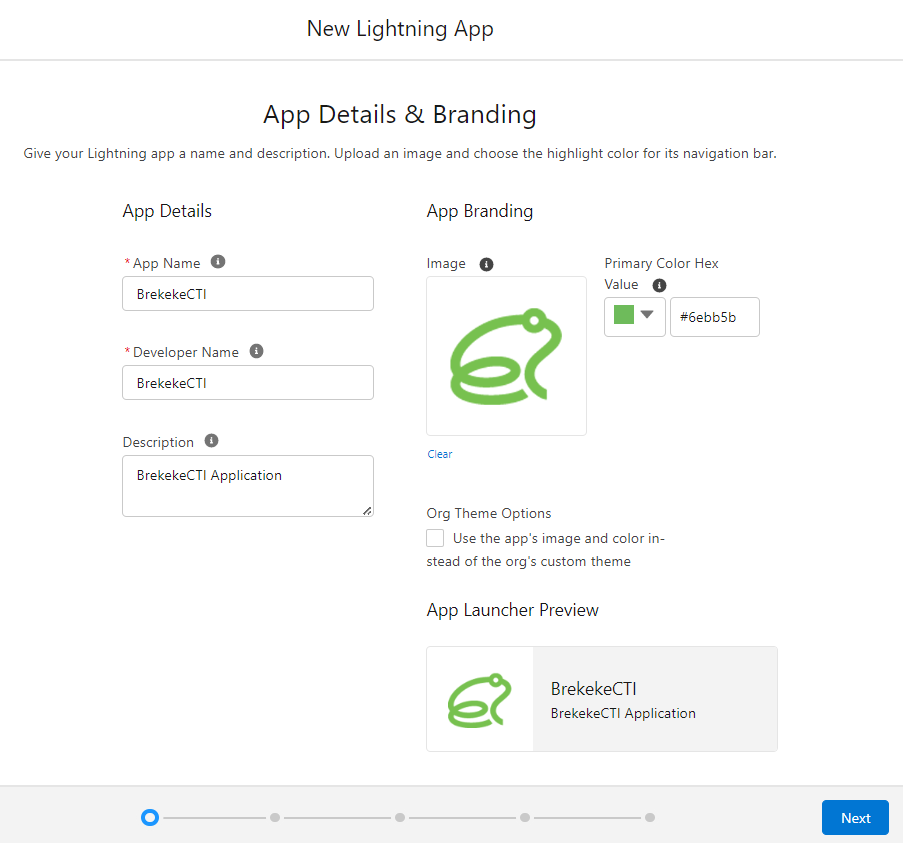
# Integrate Brekeke PBX Widget with Salesforce

## Create Lightning application

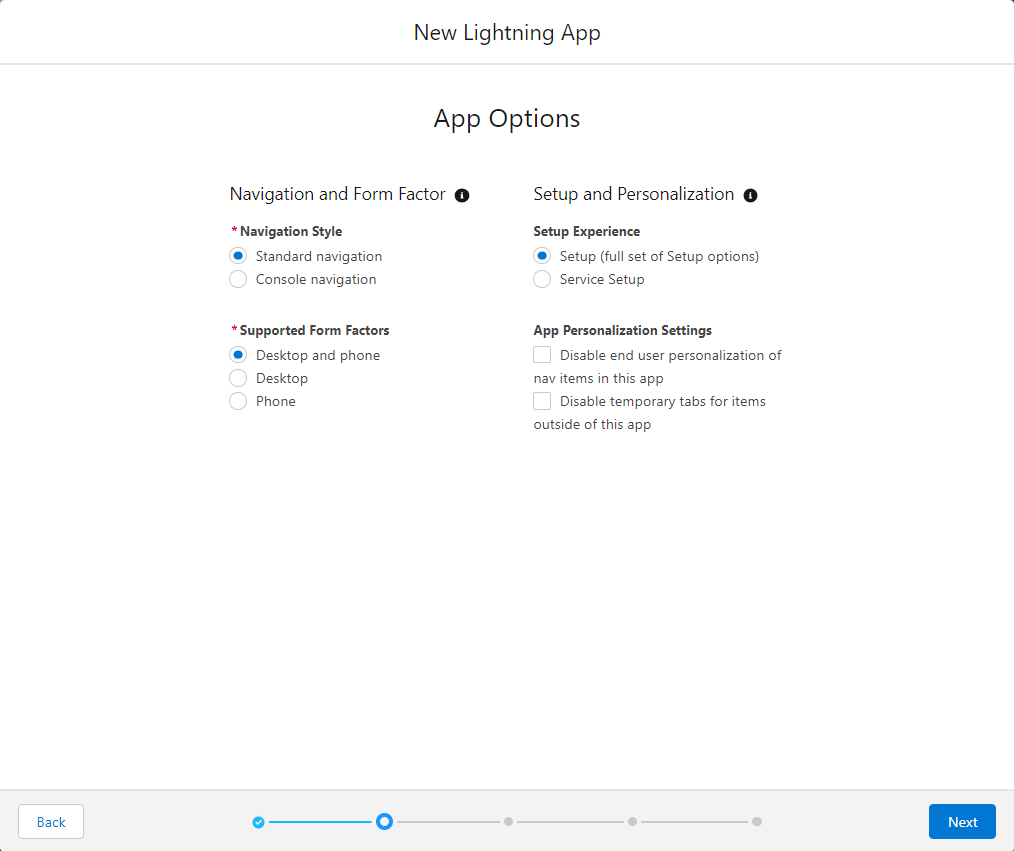
Go to setup and from Quick Find search option find “App Manager”. Add new application by clicking [New Lightning App].



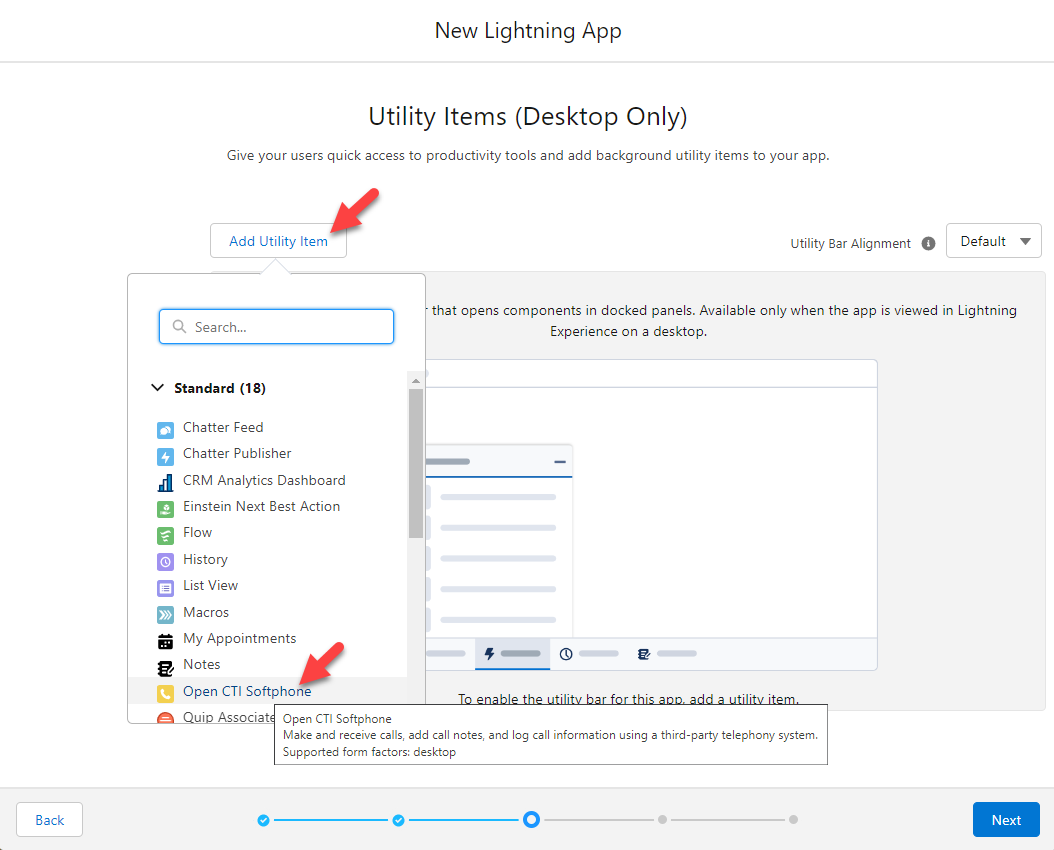
Assign AppName, Developer Name and Description.



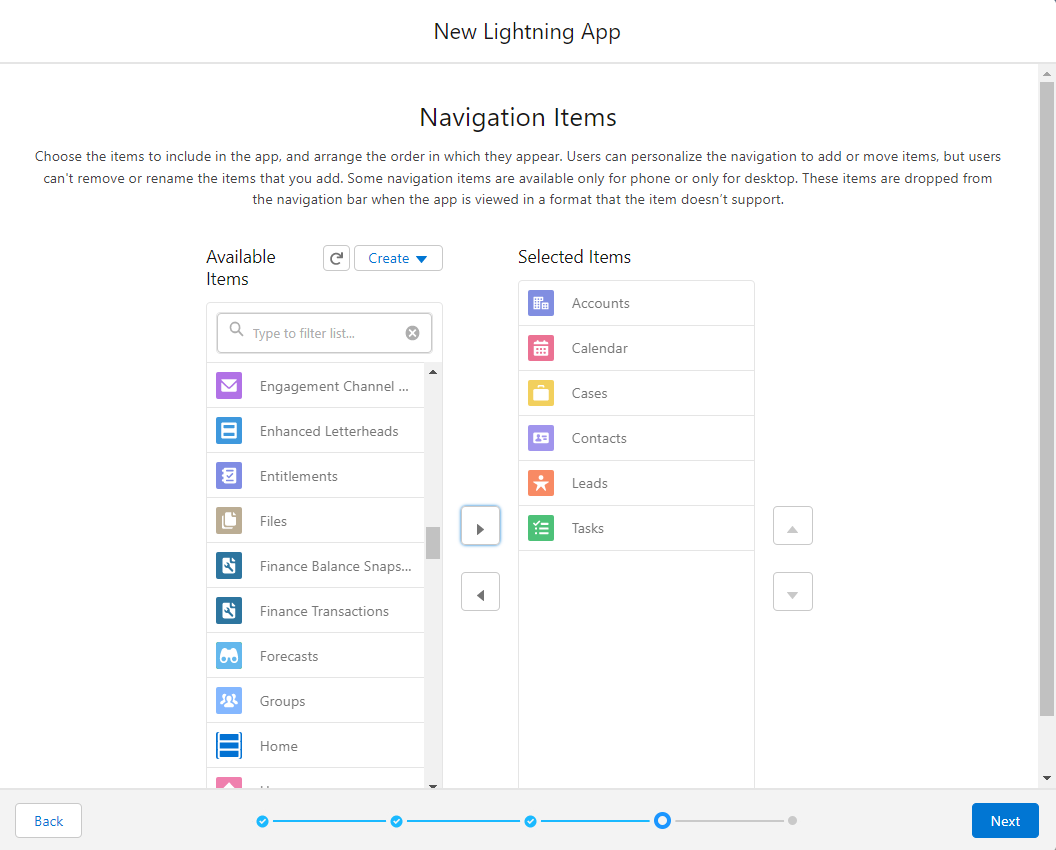
Configure the lightning app



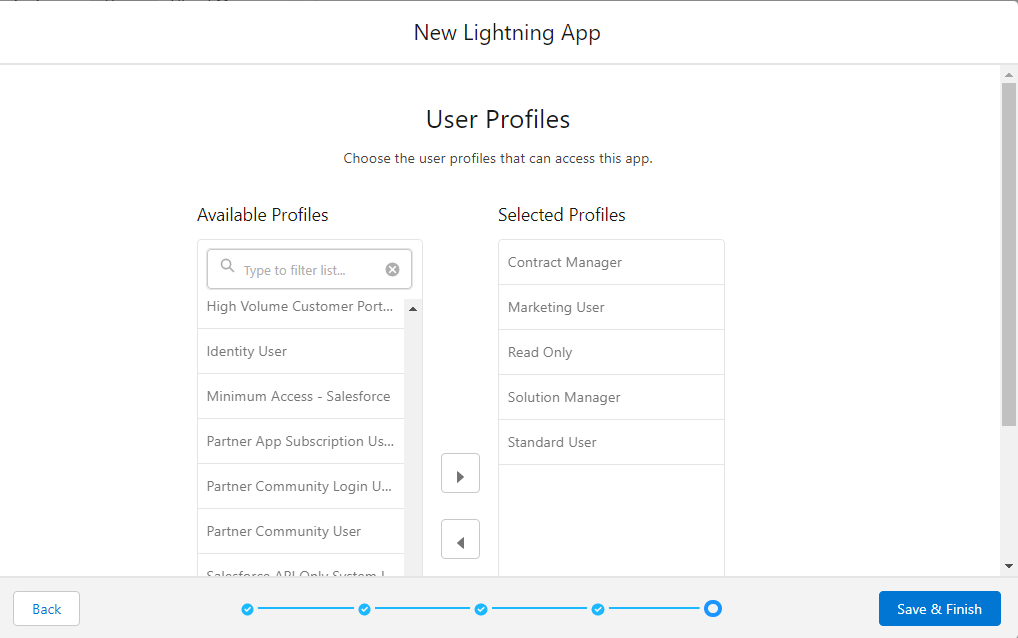
Add Utility Item and select “Open CTI softphone”.



Add required Navigation Items.



Add user profiles as per organization need.

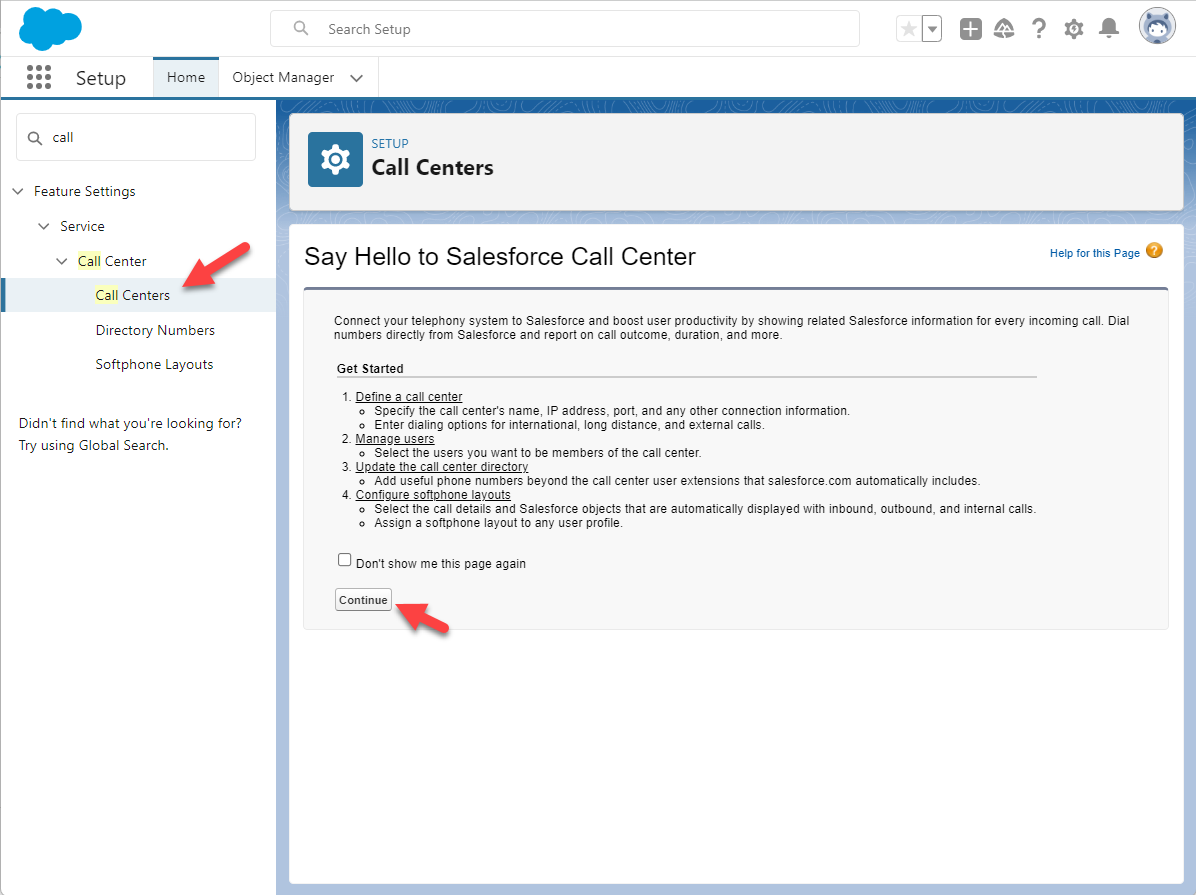


\*If system administrator will test the app later, include “System Administrator”.

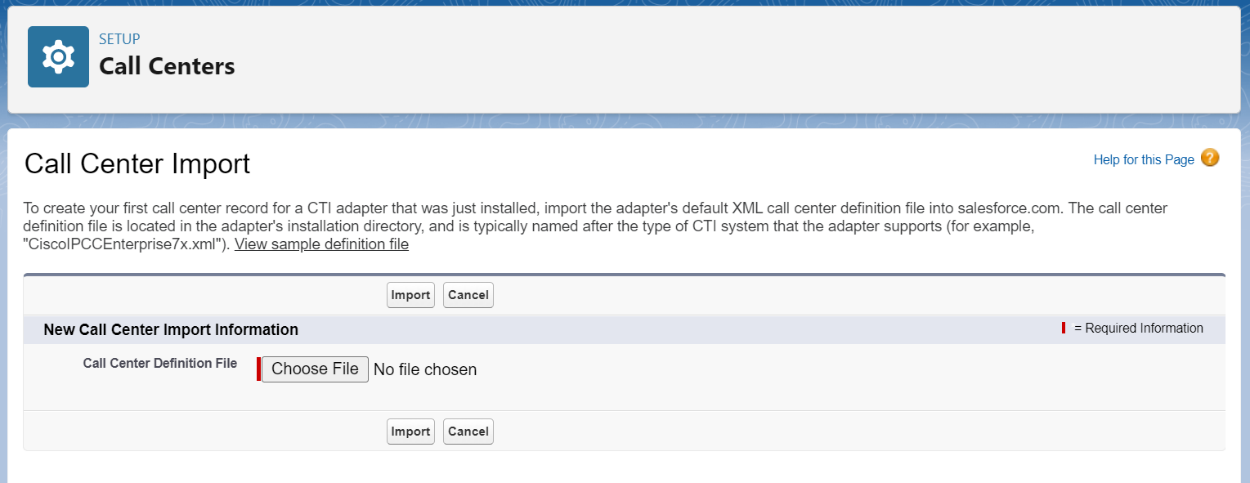
Application creation is completed.

## 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. A screenshot of a call center Description automatically generated

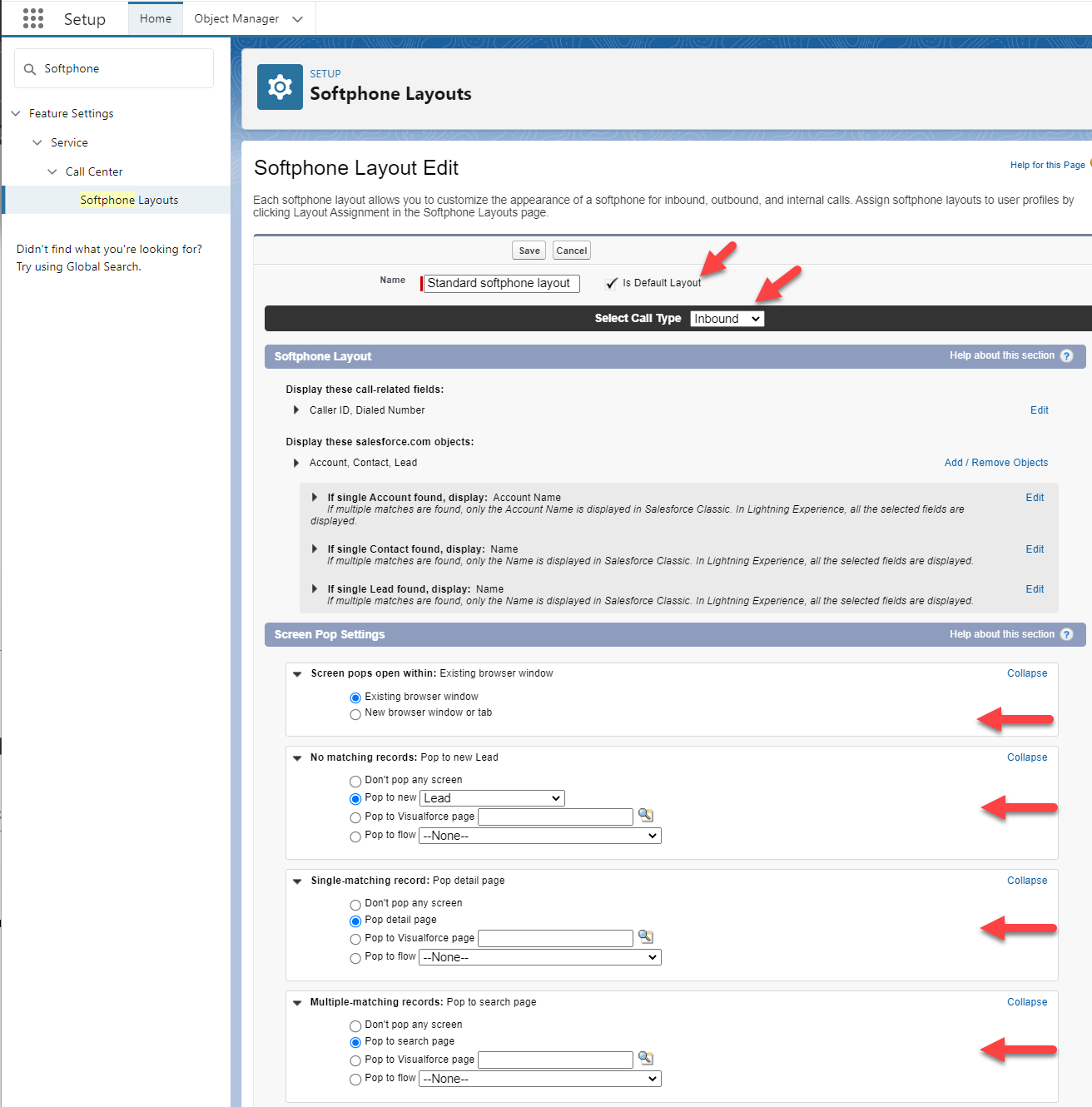
## Configure Softphone Layout

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.

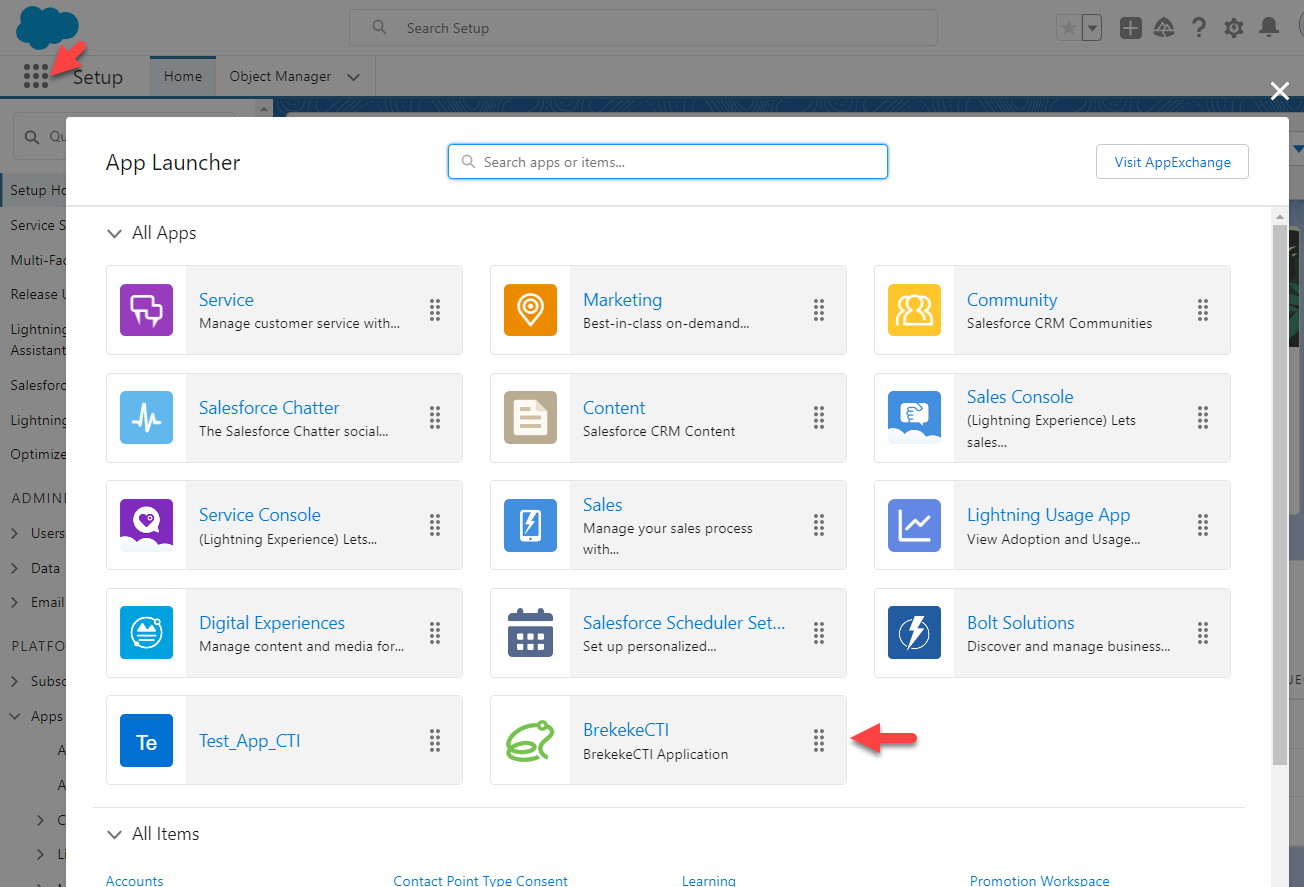
Select “Inbound” at the [Select Call Type].

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.



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

A screenshot of a computer

Description automatically generated

1. 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.

A screenshot of a computer

Description automatically generated with medium confidence

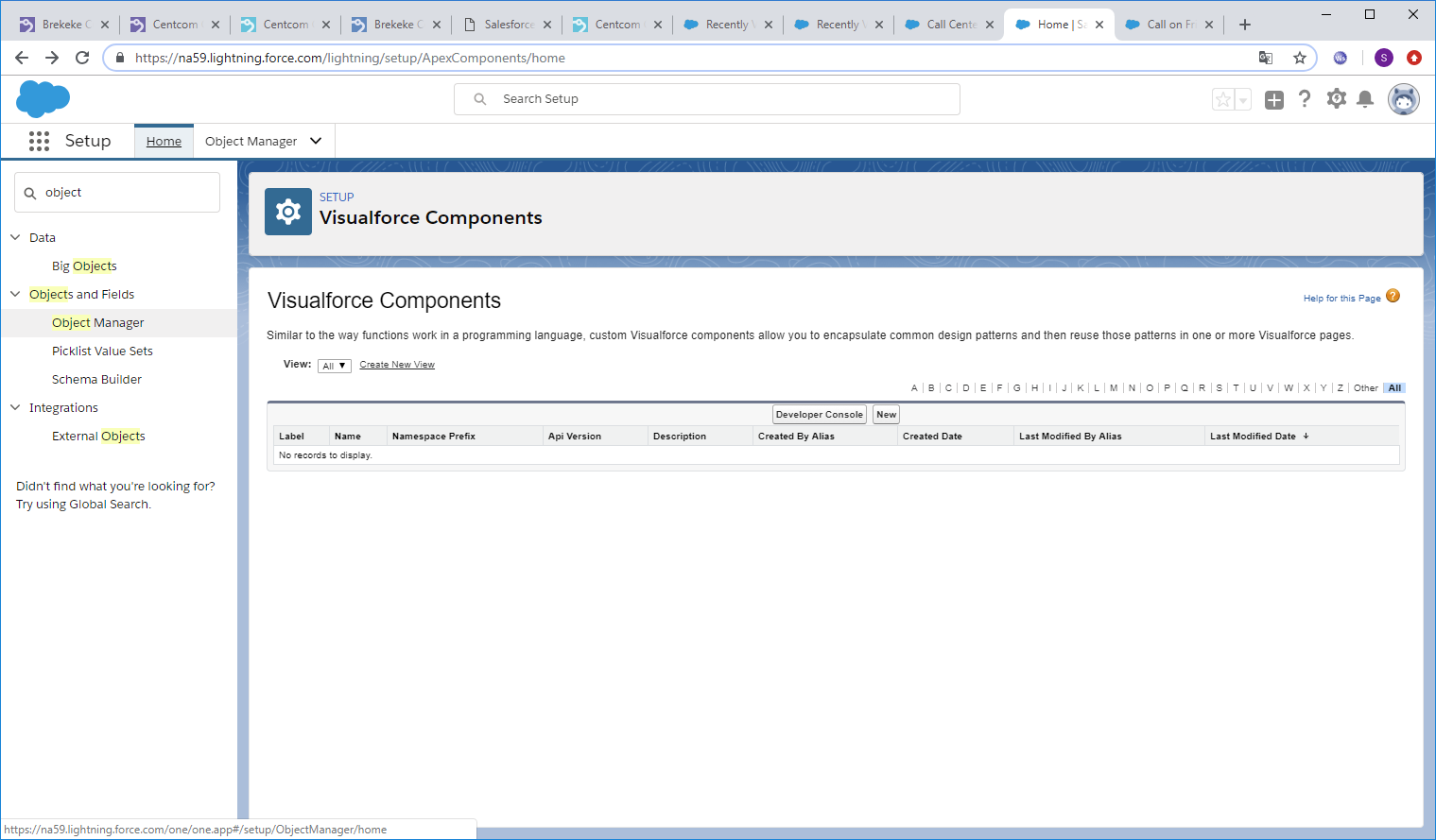
Reference Salesforce.com "Lightning Open CTI"

(*https://developer.salesforce.com/page/Lightning\_Open\_CTI*)

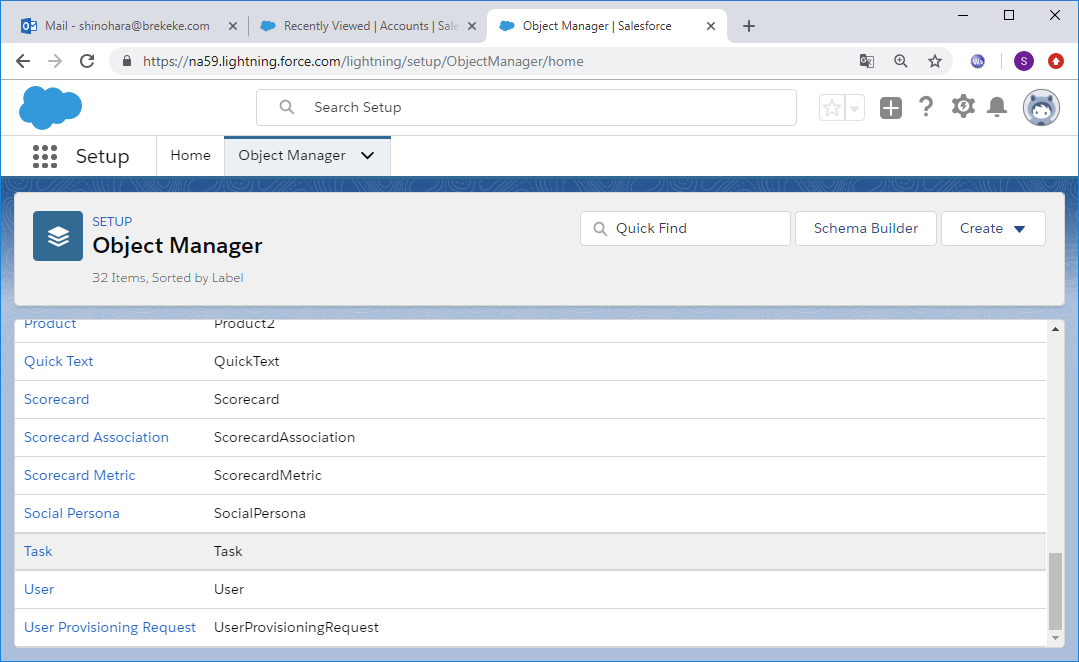
# Setup for links of recording files

## Create a link object at Salesforce CRM.

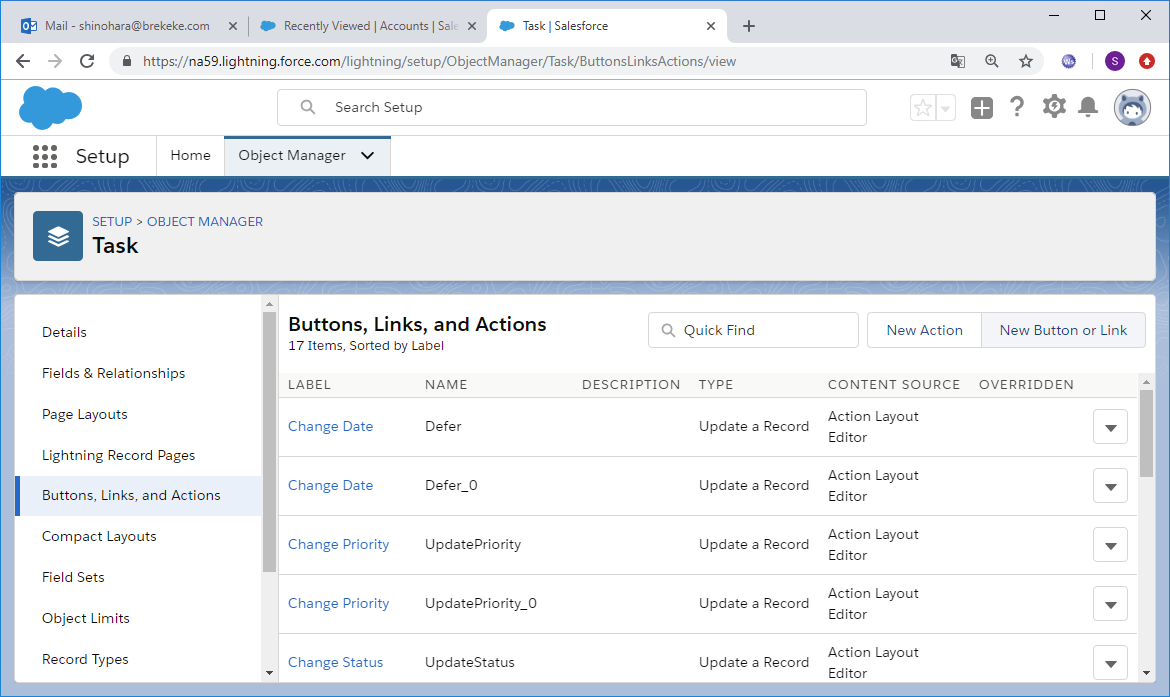
1. Move to [Object and Fields] > [Object Manager].



1. In [Object Manager] page, select a [Task] item.



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

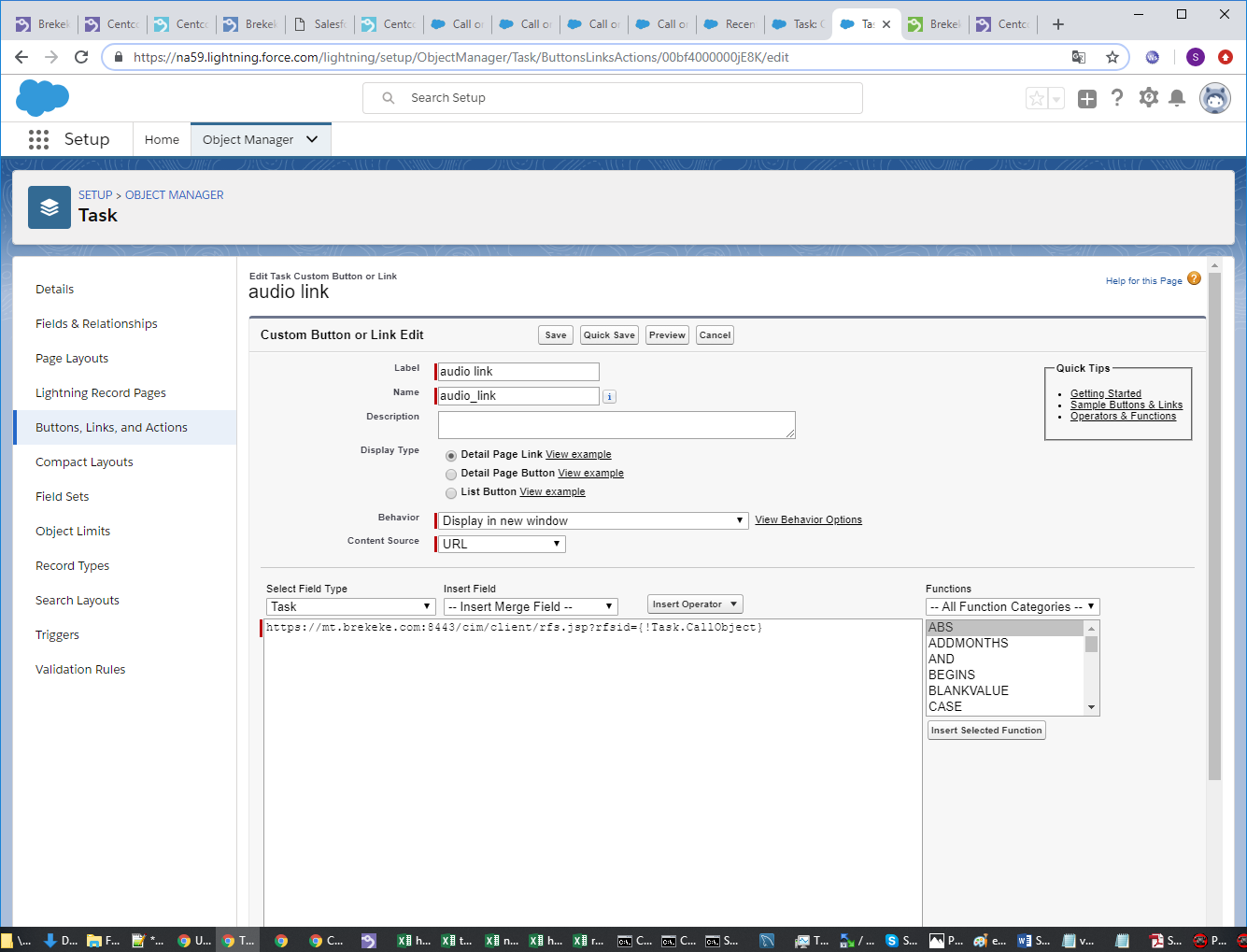


1. Edit the details as follows and save it.

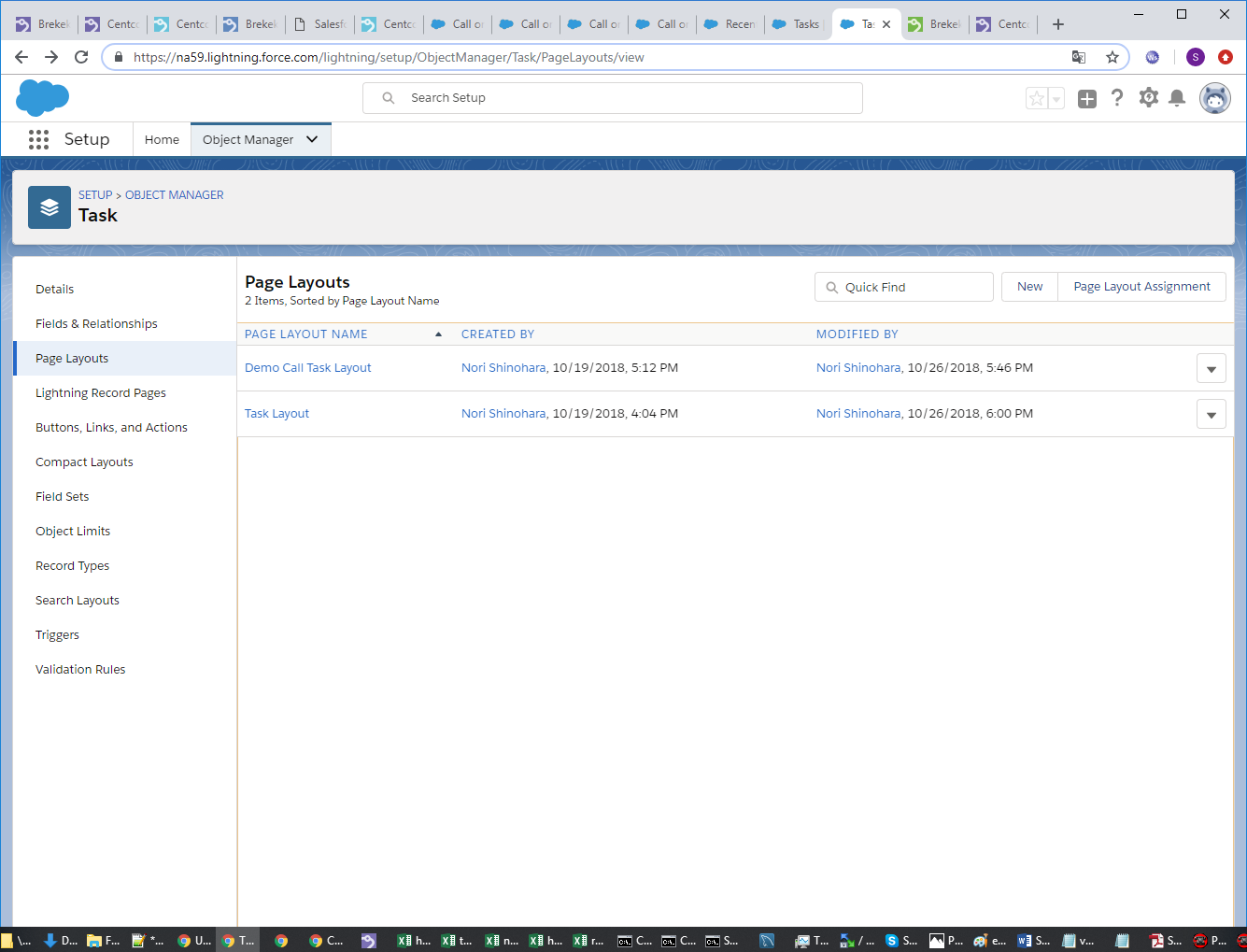
* Label : Any label (Example: *audio link*)
* Name : Any name (Example: *audio link*)
* Display Type : “*Detail Page Link*”
* Behavior : “*Display in new window*”
* Content Sourse : “*URL*”
* Select Field Type :”*Task*”
* URL:

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

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

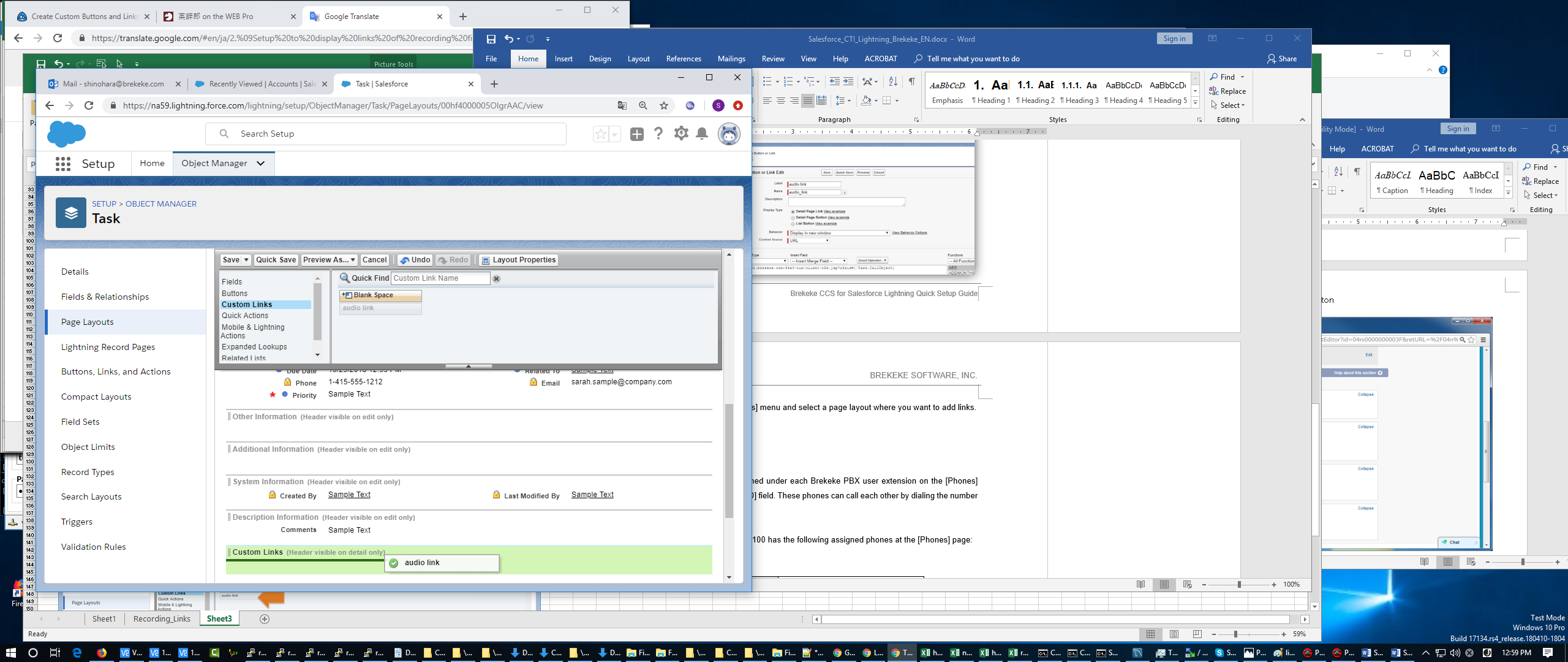


1. Move to the [Page Layouts] menu and select a page layout where you want to add link. Here, click “Task Layout” as example.



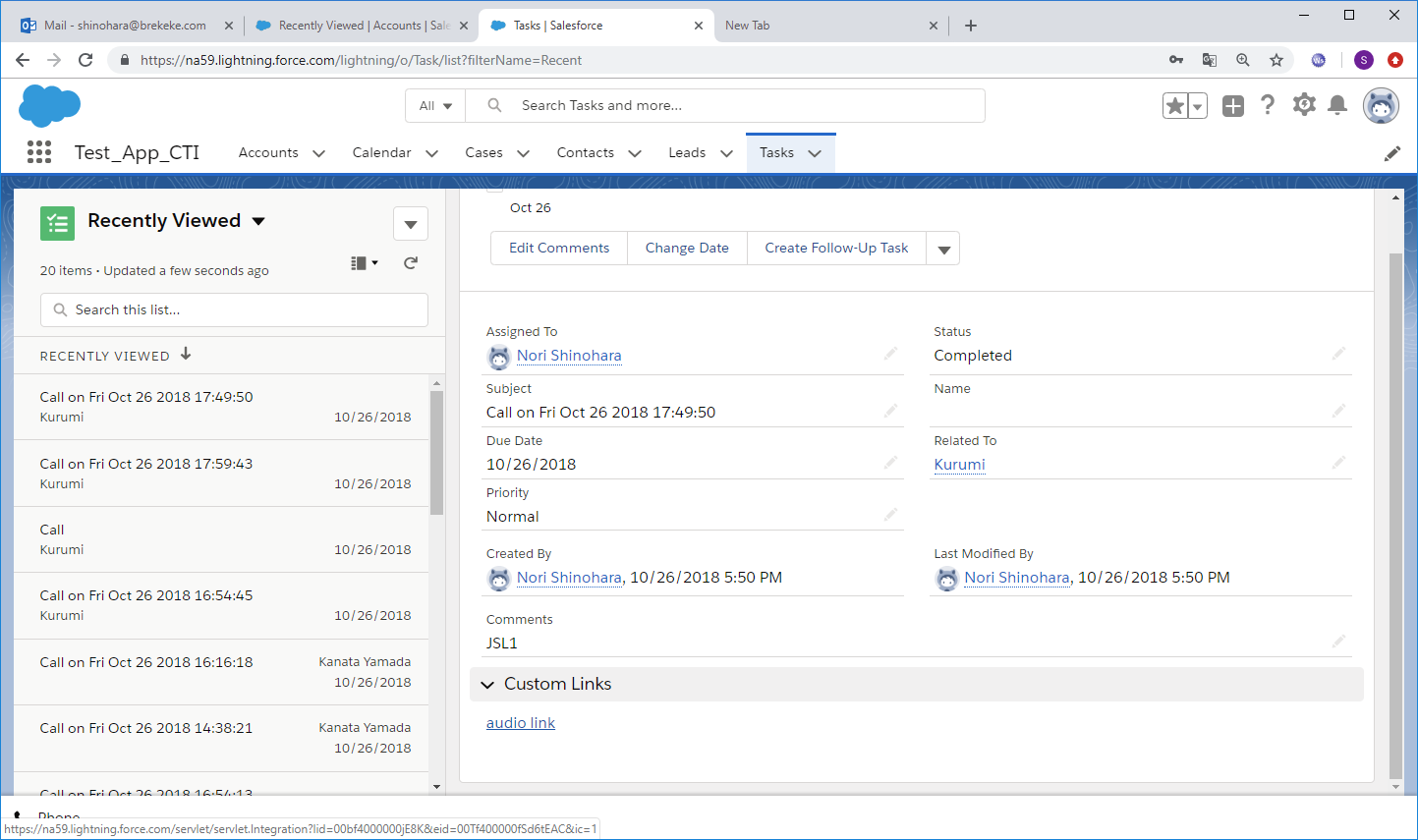
Up to four phones can be assigned under each Brekeke PBX user extension on the [Phones] page in the [Phone n] > [Phone ID] field. These phones can call each other by dialing the number 1 to 4 in [Phone n].

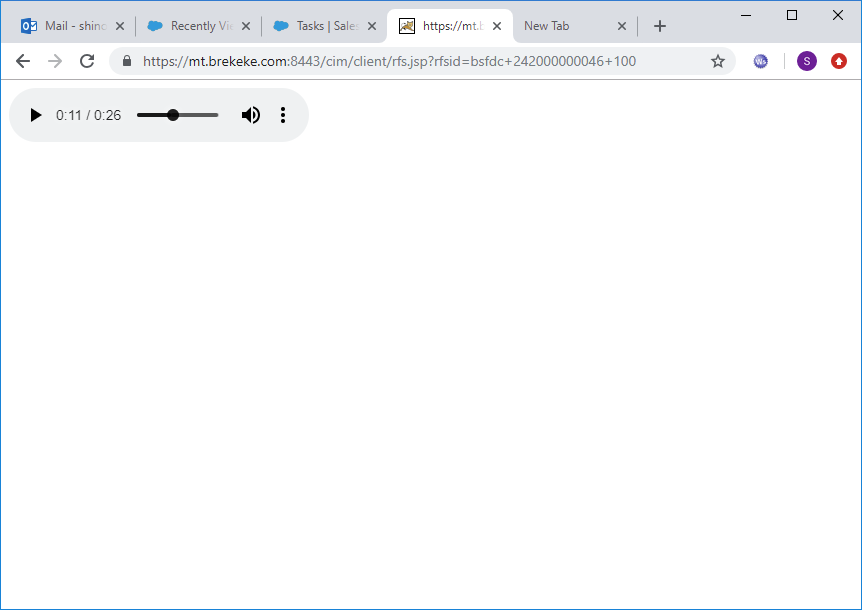
1. Select [Custom Links] menu, then drag the “audio link” object that was created in previous steps and drop it in the [Custom Links] section.



## 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)