Administrator Guide

Installing Fuze for Salesforce

Last updated: 9/26/19

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Introduction

Fuze for Salesforce is an app that runs inside Salesforce and pairs Fuze calling features with automatic tracking, matching, and call logging to help your sales and customer support organizations work more efficiently.

This guide describes requirements, key details, and other information about how to install, update, and deploy Fuze for Salesforce.

For details about how to use Fuze for Salesforce, see the Fuze for Salesforce section of our help center.

> The steps described in this guide can be applied to installations of Fuze for Salesforce **5.1-5.4**, however **the installer and XML links are version-specific.** See the article Fuze for Salesforce Installation Files in Fuze Community for all XML and installation files.

> Separate steps are required for upgrading from pre-5.1 versions, and switching to Salesforce Lightning. See the Fuze for Salesforce 5.0 release notes on Fuze Community for detailed steps and installation files.

> A Fuze for Salesforce Configuration and Troubleshooting guide is also available on Fuze Community.

Installation Components and Key Details

Fuze for Salesforce releases can include updates to the following components: the **server side** app, a salesforce **package** (sandbox and production), and a **Call Center XML file**.

While Fuze for Salesforce is not listed in the Salesforce AppExchange, these components are common to all Salesforce apps.

- **Server side** app - This is the ui component of Fuze for Salesforce that is displayed in Salesforce and runs on Fuze servers (similar to a website).
- **Sandbox** and **Production Package** - Fuze for Salesforce packages can include changes to things like the way Fuze interacts with Salesforce objects, new or changed call center settings, new Visualforce pages, etc. Each **package** release includes a **sandbox package** and a **production package**. See Understanding Packages on the Salesforce website for more detail.
- **Call Center XML file** - When you upgrade a **package**, Salesforce does not automatically upgrade the existing **call center**. You need to create a new **call center** using our release-specific **call center xml file**, copy over settings values from the **existing call center** to the **new call center**, and then migrate users from the existing to the **new call center**. One side benefit this provides is that you can have multiple **call centers** operating simultaneously, but with completely different configurations (e.g., one for sales reps, and one for support reps, each with a unique list of call results).

New Installations

The first time you install Fuze for Salesforce, the **package** must be installed, and a new **call center** is also automatically created to which you must migrate your settings and users.

Upgrade Installations

Server side releases - No installation is required. Similar to web apps, new features and improvements included in **server side** releases automatically become available in Fuze for Salesforce.

Releases that include a package - These do require installation of the **package**, creation of a new **call center** via a Fuze-provided XML file, and migration of users and settings to the new **call center**.

Fuze builds updates to **packages** and **call centers** to be backwards compatible with the **server side** to make it easy for you to complete upgrades and migrations at your convenience.

System Requirements and Supported Editions

To install and deploy Fuze in your Salesforce environment, you must have access to a Salesforce account with administrative privileges.

Each Salesforce user at your organization must also have a Fuze user account, and must be using a supported browser from the list below.

Supported Salesforce Editions:	Professional, Enterprise, Unlimited, Performance, or Developer **Note**: Fuze for Salesforce uses the Salesforce REST API which is not freely available with Salesforce Professional Edition. See this KB article from Salesforce for more details about purchasing.
Supported Experiences:	Lightning (Fuze for Salesforce 5.1+), Classic, Console
Supported Browsers:	**Multi-Tab**: Chrome 61+, Firefox 55+ **Single-Tab**: Edge 15+

Additional Information

The Fuze for Salesforce connector is built on Salesforce's Open CTI and REST API libraries, written in JavaScript to embed API calls and processes.

For details on Salesforce's Open CTI library and supported editions, refer to:

https://developer.salesforce.com/docs/atlas.en-us.214.0.api_cti.meta/api_cti/sforce_api_cti_intro.htm

For details on Salesforce's REST API library and supported editions, refer to:

https://developer.salesforce.com/docs/atlas.en-us.208.0.api_tooling.meta/api_tooling/intro_rest_overview.htm

Installing or Upgrading Fuze for Salesforce

Step 1: Install the Fuze for Salesforce Sandbox Package

This step is recommended but is not mandatory. If you decide to forego testing in your Salesforce sandbox environment, you can proceed to **Step 2**.

To install or upgrade a Fuze for Salesforce Sandbox package:

1. Log in to your Salesforce sandbox environment as an administrator at https://test.salesforce.com.
2. Run the sandbox installer on your sandbox instance. This is available in the Fuze for Salesforce Installation Files article in Fuze Community.
   *For simplicity, we recommend that you select **Install for All Users** in the prompt that appears.*

Next, you need to import the Fuze for Salesforce XML file to create a new call center. Proceed to **Step 2**.

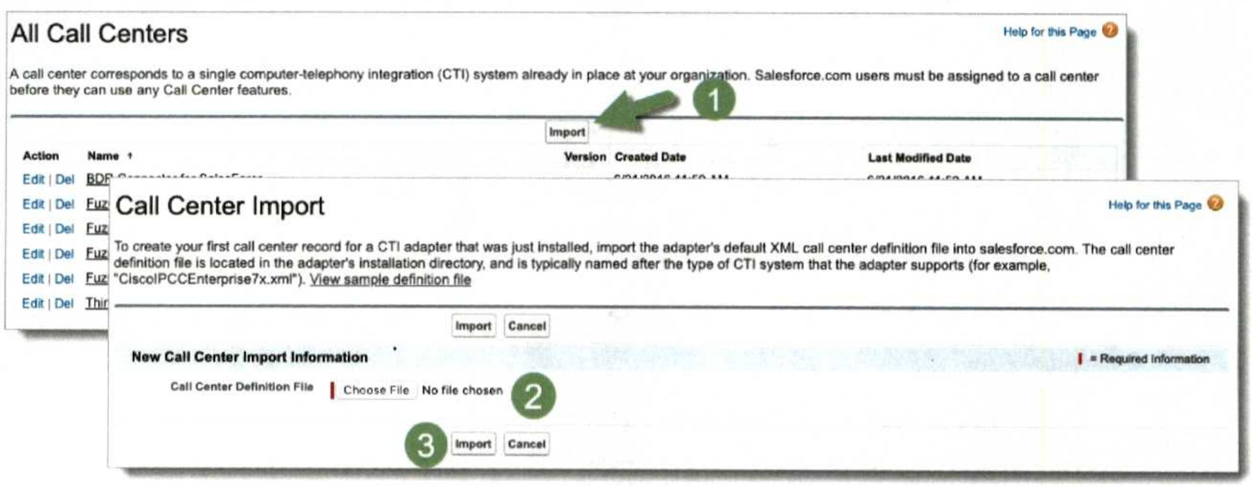
Step 2: Create the New Call Center

When upgrading a Fuze for Salesforce **package**, you need to create a **new call center** by importing the release-specific **call center XML file**.

Note: If you are installing Fuze for Salesforce for the first time, you can skip this step.

To create a new call center using the XML file:

1. Log in to https://www.salesforce.com using an administrator account.
2. Download the Fuze for Salesforce call center xml file from Fuze Community.
3. Navigate to **Setup** > **Feature Settings** > **Service** > **Call Center** > **Call Centers**, and click **Import**. The Call Center Import screen appears.



4. Click **Choose File**, navigate to the call center XML file you downloaded, and click **Open**. The XML file is shown on the Call Center Import screen.
5. In the Call Center Import Screen, click **Import**.

   The call center is imported and you can assign a name to it (e.g., *Fuze for Salesforce [version number]*).

Once you've tested the new call center, you need to manually migrate all settings and users from the **existing call center** to the **new call center** as described in **Step 3**.

For reference, below are the contents of the **Fuze for Salesforce 5.4** Call Center xml file.


```
<callCenter>
    <section sortOrder="0" name="reqGeneralInfo" label="General Information">
        <item sortOrder="0" name="reqInternalName" label="InternalName">Fuze54</item>
        <item sortOrder="1" name="reqDisplayName" label="Display Name">Fuze for Salesforce 5.4</item>
        <item sortOrder="2" name="reqAdapterUrl" label="CTI Adapter
URL">https://salesforce.fuze.com/</item>
        <item sortOrder="3" name="reqUseApi" label="Use CTI API">true</item>
        <item sortOrder="4" name="reqSalesforceCompatibilityMode" label="Salesforce Compatibility
Mode">Classic_and_Lightning</item>
        <item sortOrder="5" name="reqSoftphoneHeight" label="Softphone Height">450</item>
        <item sortOrder="6" name="reqSoftphoneWidth" label="Softphone Width">200</item>
    </section>
    <section sortOrder="1" name="tpSettings" label="Settings">
        <item sortOrder="0" name="filterByAssociateAccountRollup" label="Restrict Links to Caller
Account">false</item>
        <item sortOrder="1" name="SearchTypes" label="Record Types to Include
(CSV)">contract,opportunity,activity,case</item>
        <item sortOrder="2" name="OpportunityStatusTypes" label="Opportunity Status to Include
(CSV)">MasterLabel,Prospecting,Qualification,Proposal/Price Quote,Value Proposition,Closed Lost,Closed
Won,Id. Decision Makers,Needs Analysis,Negotiation/Review,Perception Analysis</item>
        <item sortOrder="3" name="CaseStatusTypes" label="Case Status to Include
(CSV)">New,Escalated</item>
        <item sortOrder="4" name="ContractStatusTypes" label="Contract Status to Include (CSV)">Draft,In
Approval Process,Activated</item>
        <item sortOrder="5" name="taskType" label="Task Type">Fuze</item>
        <item sortOrder="6" name="CallResultOptions" label="Call Result Options (CSV)">No Answer, Left
Voicemail, Follow-up Required, Transferred</item>
        <item sortOrder="7" name="autoLog" label="Create Case for All Inbound Calls">false</item>
        <item sortOrder="8" name="disableCallLogCreation" label="Disable Task Creation for All
Calls">false</item>
        <item sortOrder="9" name="createCallLogForUnknownCaller" label="Create Task for Unknown
Caller">false</item>
        <item sortOrder="10" name="createCallLogOnIncomingRing" label="Create Task for Incoming Call on
Ring">true</item>
        <item sortOrder="11" name="createCallLogOnOutgoingRing" label="Create Task for Outgoing Call on
Ring">false</item>
        <item sortOrder="12" name="editCallLogSubject" label="Edit the Call Log Subject">true</item>
        <item sortOrder="13" name="callNotify" label="Enable Call Notification">false</item>
    </section>
    <section sortOrder="2" name="tpClickToCall" label="Click to Call">
        <item sortOrder="0" name="clickToCallAutoAnswer" label="Auto Answer">false</item>
        <item sortOrder="1" name="autoLinkWithContextRecord" label="Auto Link With Context
Record">false</item>
    </section>
</callCenter>
```

Step 3: Migrate Settings and Users

Whether you're installing Fuze for Salesforce for the first time, or installing an updated **package**, you need to migrate settings and users from your **existing call center** to the **new call center** (created in **Step 2**).

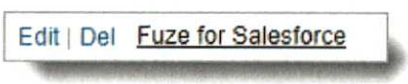
To migrate settings and users:

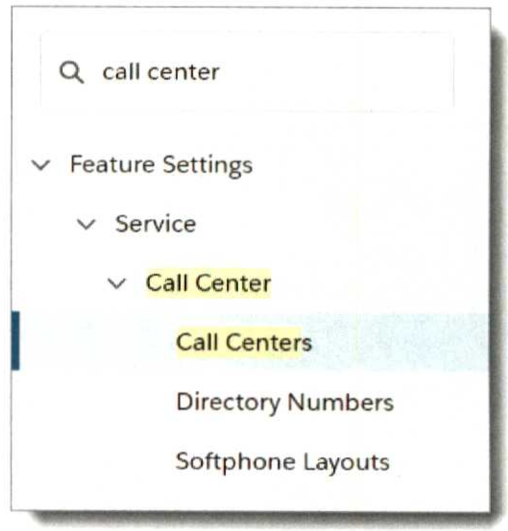
1. 8Log in to https://test.salesforce.com using an administrator account.

2. From within Salesforce, click **Setup** > **Feature Settings** > **Service** > **Call Center** > **Call Center** > **[your new call center]**.

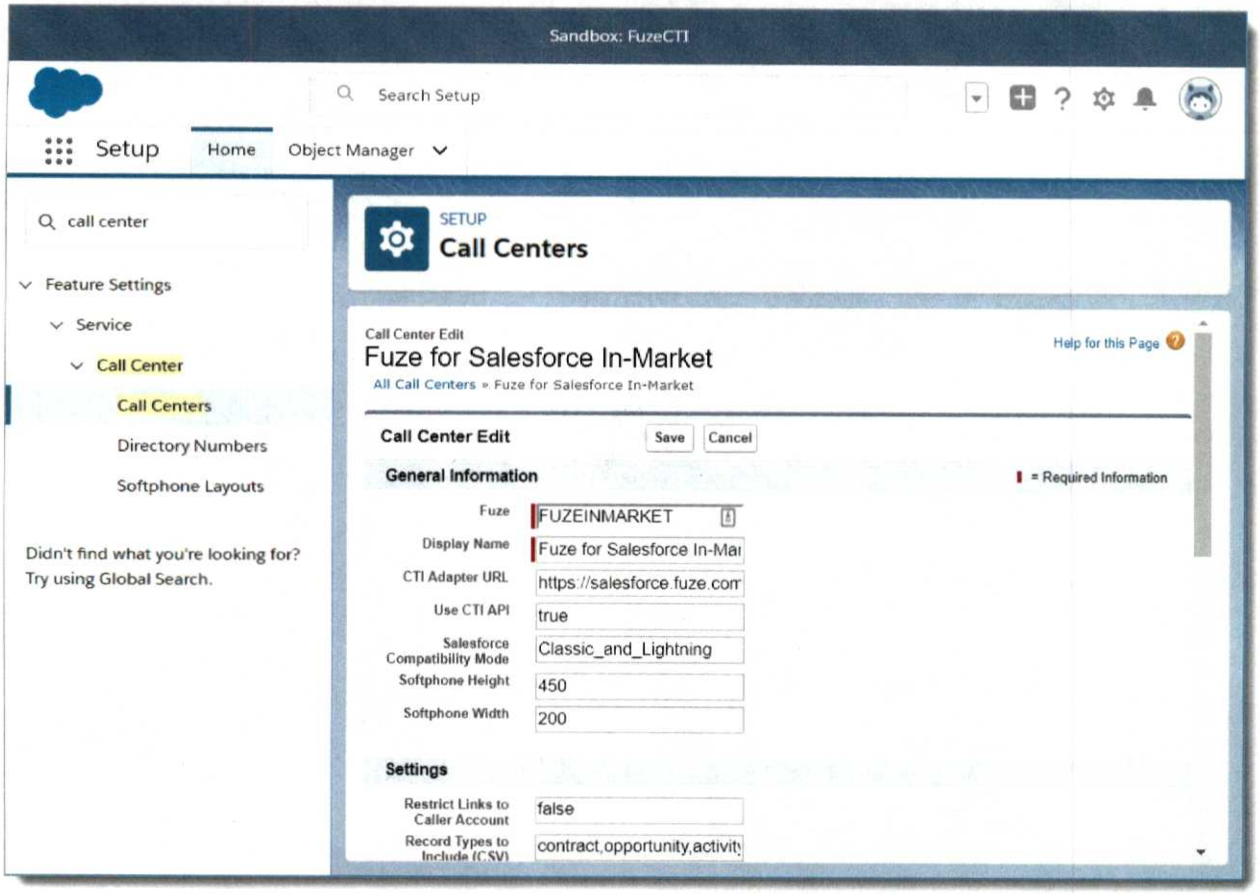
3. Locate the new call center you created and click **Edit**.

   For example, if you named your new call center Fuze for Salesforce, it would appear as follows:



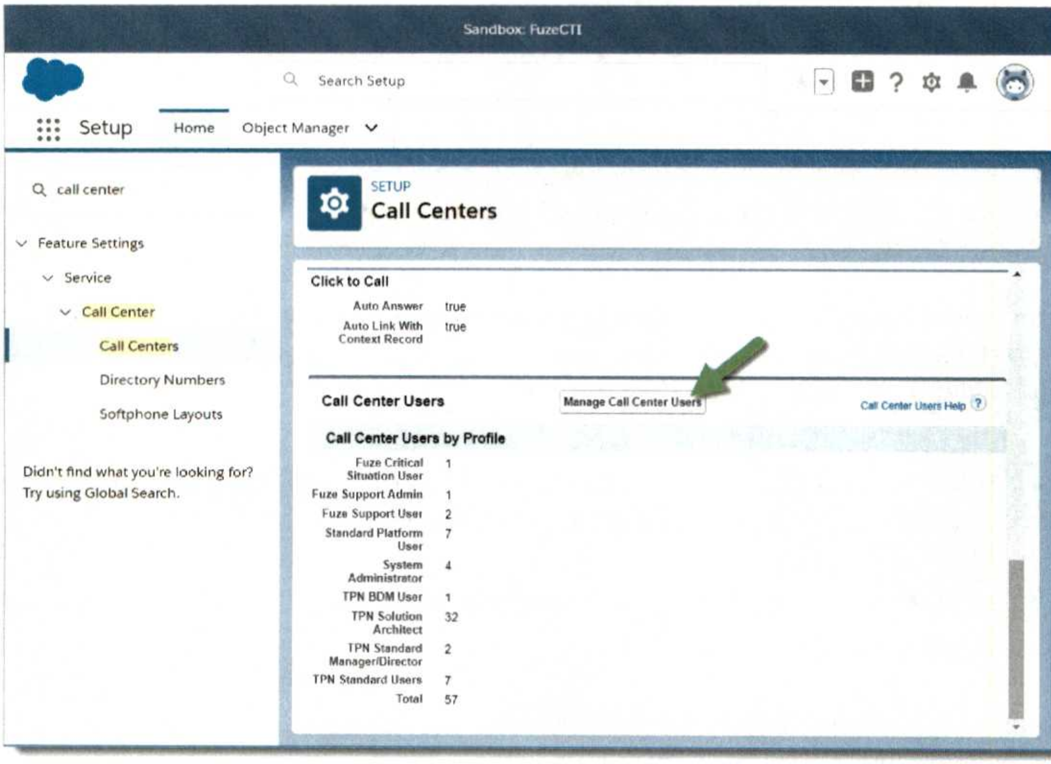


4. The **Call Center Edit** screen appears, shown below.

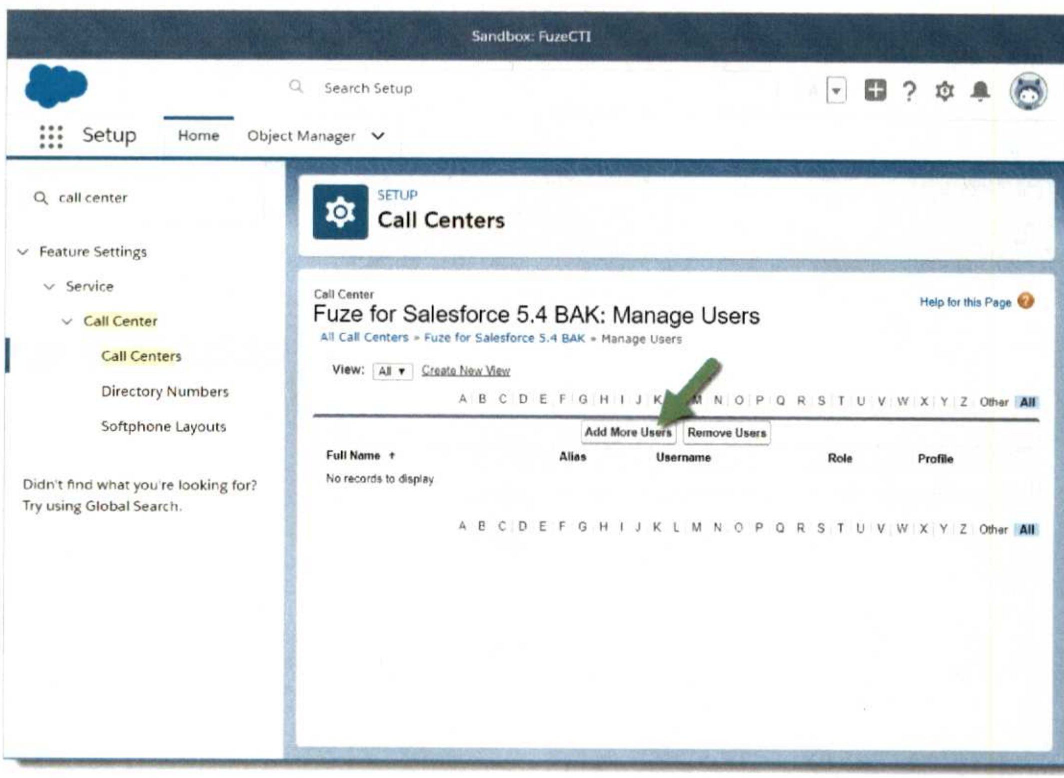


5. On the Call Center Edit screen, enter "**https://salesforce.fuze.com/**" as the setting value for **CTI Adapter URL**.
6. Additionally, configure the following setting values to match your existing call center settings (or set a different value if desired for your new call center):
   - **Enable Call Notification** - Set this option to **true** if you want the browser to show call notifications for incoming calls when you are not on the **Salesforce** tab.
   - **Create log for incoming call on ring** - Set this to **true** if you want a call log to automatically be created when an incoming call begins to ring on an agent's phone.
   - **Create log for outgoing call on ring** - Set this to **true** if you want a call log to automatically be created when an outgoing call begins to ring on an agent's phone.
7. Take note of the remaining call center settings in your **existing call center**, and add or update the values in your **new call center** to match.

8. Click **Manage Call Center Users.**



The Manage Users screen appears, shown below.



9. Find and add users to the new call center:
    a. Click **Add More Users**.
    b. Use the filters to find users you want to add, or click **Find** to list all users.
    c. Select the users in the list that you want to add.
    d. Click **Add to Call Center**.

> The search results do not show users who are already in the list.

> If you cannot find users using the Search tool, verify that the users have the correct Salesforce roles and permissions to participate in a call center. Also, the user cannot have a call center assigned directly to their user profile.

Fuze for Salesforce is now deployed to each user's **Salesforce sandbox** environment, and your users can now test the new version of Fuze for Salesforce.

Fuze for Salesforce can be displayed by following the steps described in the Enabling Fuze for Salesforce in Lightning Apps section below.

Once your testing is complete, you can install the Fuze for Salesforce package on your production environment. Proceed to **Step 4**.

Step 4: Install the Production Package

Once you have set up your new call center, and have migrated your users and settings to your new call center (see the previous step) you can install the package on your Salesforce production environment.

To upgrade Fuze for Salesforce:

1. Log in to your Salesforce production instance as an administrator at https://www.salesforce.com.

2. Run the production installer on your production instance. This is available in the Fuze for Salesforce Installation Files article in Fuze Community.
   For simplicity, we recommend that you select ***Install for All Users*** *in the prompt that appears.*

Fuze for Salesforce is installed on your Salesforce production environment, and can be displayed by following the steps described in the Enabling Fuze for Salesforce in Lightning Apps section below.

Appendix: Enabling *Fuze for Salesforce* in Lightning Apps

In each of the Lightning apps, *Fuze for Salesforce* can be displayed on the **Utility Bar** at the bottom of the screen. This can be manually configured by customers' Salesforce administrators so that any CTI can be visible on Lightning.

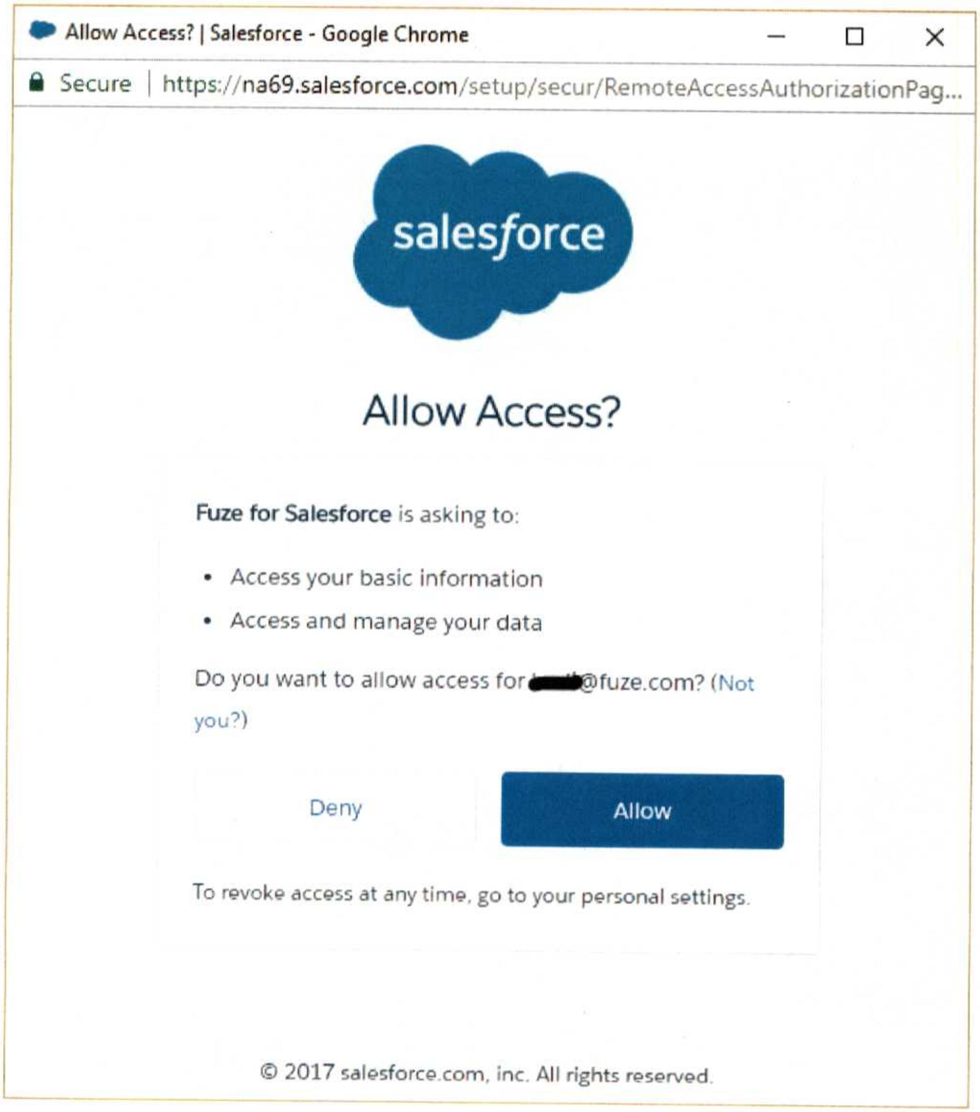
To configure this:

1. Setup → App Manager
2. In one of the Lightning apps' row, click on the menu → Edit
3. Click on tab **Utility Bar**
4. Click on **Add** → Open CTI Softphone
5. Click **Save ... Done**

Users associated to Fuze for Salesforce should now see **Fuze** on the Utility Bar.
For information about how to use Fuze for Salesforce, see the Fuze Help Center.

Appendix: Connected App approval requests (5.1 and later)

Fuze for Salesforce is a Connected App, being able to handle Salesforce Authentication independently from the Salesforce page.



With this change, **Fuze for Salesforce** now:

1. Asks for user approval at every login.
2. On session timeout, allows the user to sign in again without leaving or refreshing the Salesforce page.

Administrators can bypass the need to approve at every login by pre-authorizing Fuze for Salesforce in the following way:

1. Navigate to Setup → Connected Apps → Manage Connected Apps
2. Click **Edit** in the *Fuze for Salesforce* row
3. Change **Permitted Users** to **Admin approved users are pre-authorized**
4. Assign **Profiles** and **Permission Sets** as fit to pre-authorize users

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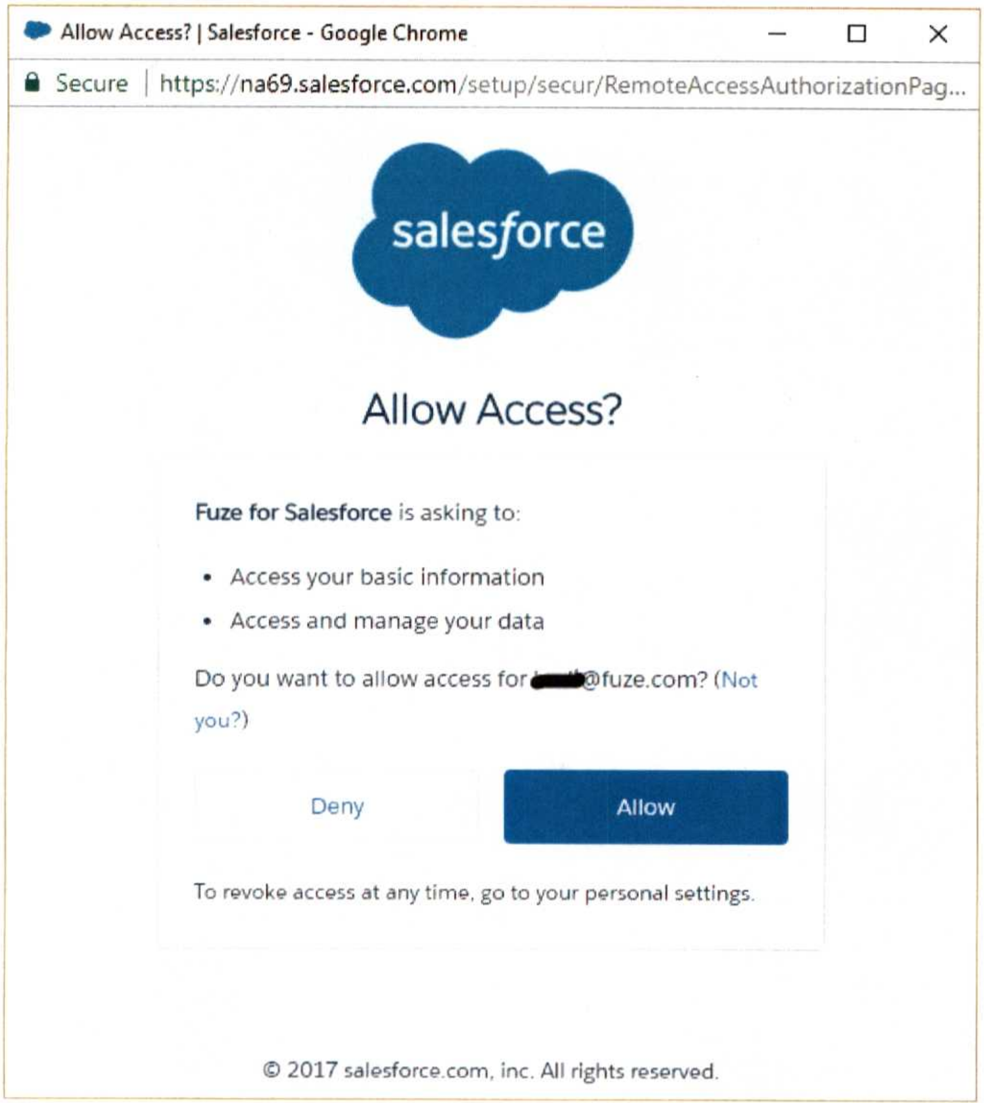

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To configure this:

1. Setup → App Manager
2. In one of the Lightning apps' row, click on the menu → Edit
3. Click on tab **Utility Bar**
4. Click on **Add** → Open CTI Softphone
5. Click **Save ... Done**

Users associated to Fuze for Salesforce should now see **Fuze** on the Utility Bar.
For information about how to use Fuze for Salesforce, see the Fuze Help Center.

Step 4: Install the Production Package

Once you have set up your new call center, and have migrated your users and settings to your new call center (see the previous step) you can install the package on your Salesforce production environment.

To upgrade Fuze for Salesforce:

1. Log in to your Salesforce production instance as an administrator at https://www.salesforce.com.
2. Run the production installer on your production instance. This is available in the Fuze for Salesforce Installation Files article in Fuze Community.
   *For simplicity, we recommend that you select **Install for All Users** in the prompt that appears.*

Fuze for Salesforce is installed on your Salesforce production environment, and can be displayed by following the steps described in the Enabling Fuze for Salesforce in Lightning Apps section below.

9. Find and add users to the new call center:
    a. Click **Add More Users**.
    b. Use the filters to find users you want to add, or click **Find** to list all users.
    c. Select the users in the list that you want to add.
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Fuze for Salesforce can be displayed by following the steps described in the Enabling Fuze for Salesforce in Lightning Apps section below.

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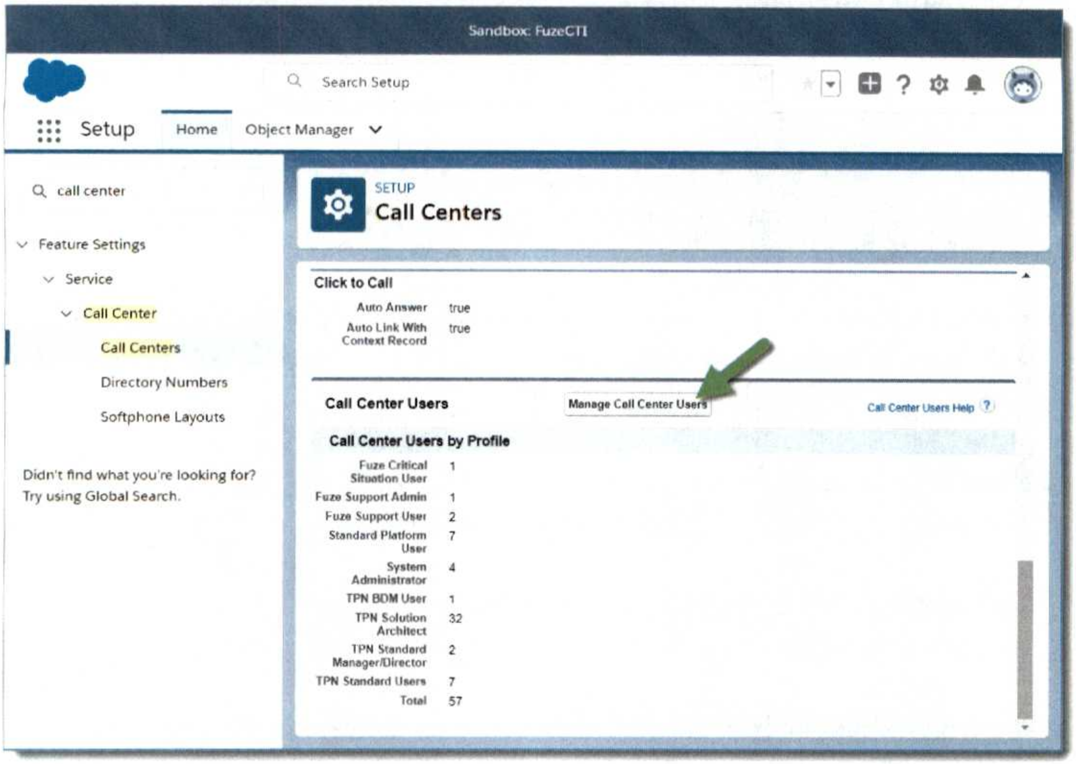
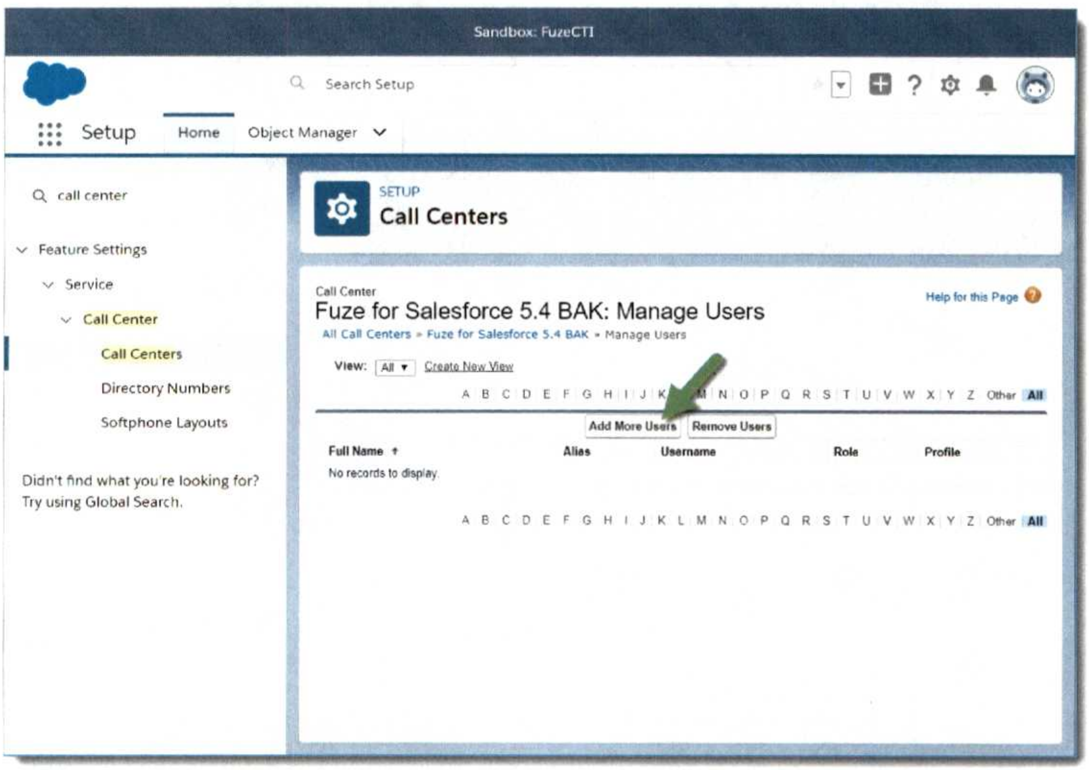
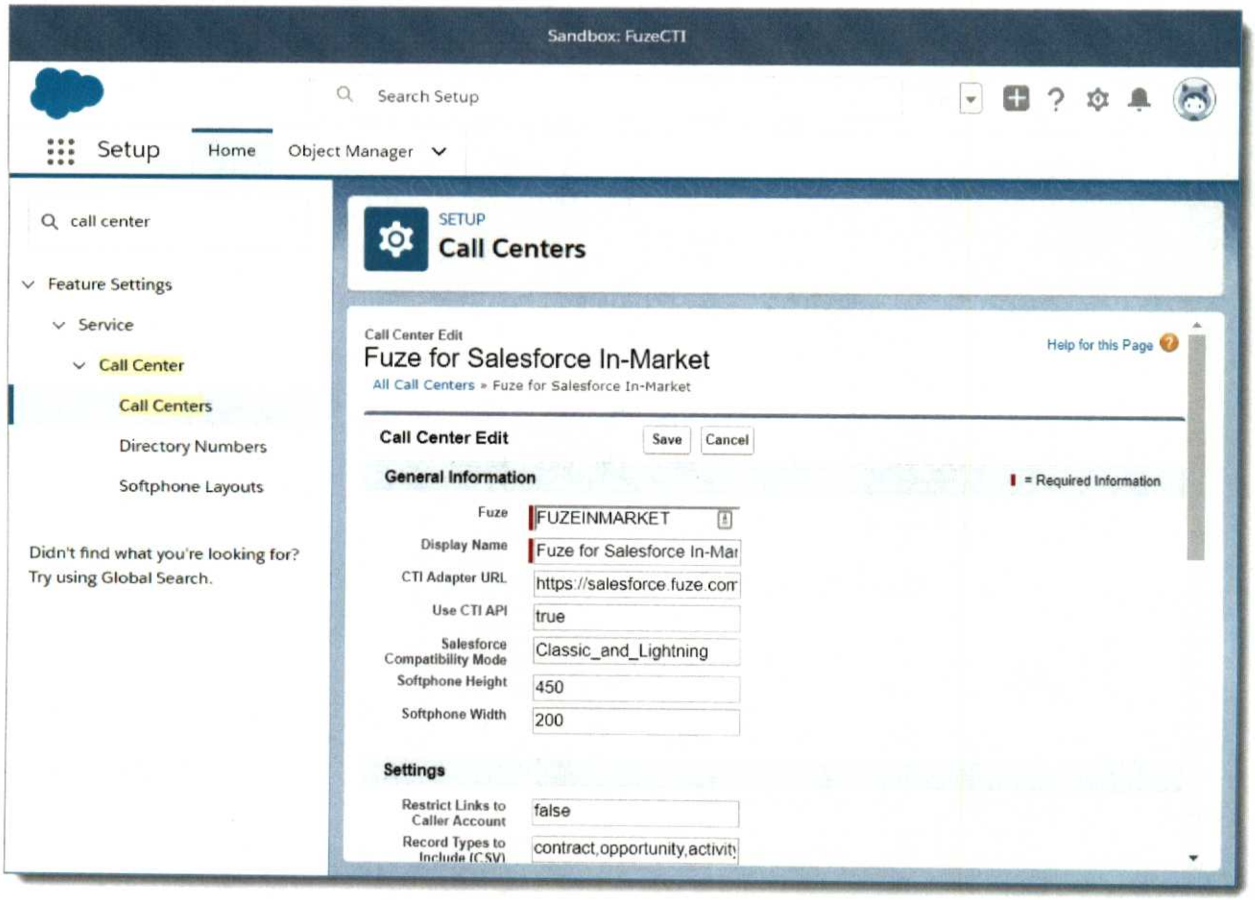
8. Click **Manage Call Center Users.**



The Manage Users screen appears, shown below.



4. The **Call Center Edit** screen appears, shown below.



5. On the Call Center Edit screen, enter "**https://salesforce.fuze.com/**" as the setting value for **CTI Adapter URL**.
6. Additionally, configure the following setting values to match your existing call center settings (or set a different value if desired for your new call center):
    - **Enable Call Notification** - Set this option to **true** if you want the browser to show call notifications for incoming calls when you are not on the **Salesforce** tab.
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7. Take note of the remaining call center settings in your **existing call center**, and add or update the values in your **new call center** to match.

Step 3: Migrate Settings and Users

Whether you're installing Fuze for Salesforce for the first time, or installing an updated **package**, you *need to* migrate settings and users from your **existing call center** to the **new call center** (created in **Step 2**).

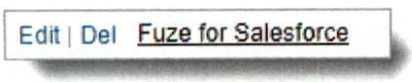
To migrate settings and users:

1. 8Log in to https://test.salesforce.com using an administrator account.

2. From within Salesforce, click **Setup** > **Feature Settings** > **Service** > **Call Center** > **Call Center** > **[your new call center]**.

3. Locate the new call center you created and click **Edit**.

   For example, if you named your new call center Fuze for Salesforce, it would appear as follows:



For reference, below are the contents of the **Fuze for Salesforce 5.4** Call Center xml file.


```
<callCenter>
    <section sortOrder="0" name="reqGeneralInfo" label="General Information">
        <item sortOrder="0" name="reqInternalName" label="InternalName">Fuze54</item>
        <item sortOrder="1" name="reqDisplayName" label="Display Name">Fuze for Salesforce 5.4</item>
        <item sortOrder="2" name="reqAdapterUrl" label="CTI Adapter
URL">https://salesforce.fuze.com/</item>
        <item sortOrder="3" name="reqUseApi" label="Use CTI API">true</item>
        <item sortOrder="4" name="reqSalesforceCompatibilityMode" label="Salesforce Compatibility
Mode">Classic_and_Lightning</item>
        <item sortOrder="5" name="reqSoftphoneHeight" label="Softphone Height">450</item>
        <item sortOrder="6" name="reqSoftphoneWidth" label="Softphone Width">200</item>
    </section>
    <section sortOrder="1" name="tpSettings" label="Settings">
        <item sortOrder="0" name="filterByAssociateAccountRollup" label="Restrict Links to Caller
Account">false</item>
        <item sortOrder="1" name="SearchTypes" label="Record Types to Include
(CSV)">contract,opportunity,activity,case</item>
        <item sortOrder="2" name="OpportunityStatusTypes" label="Opportunity Status to Include
(CSV)">MasterLabel,Prospecting,Qualification,Proposal/Price Quote,Value Proposition,Closed Lost,Closed
Won,Id. Decision Makers,Needs Analysis,Negotiation/Review,Perception Analysis</item>
        <item sortOrder="3" name="CaseStatusTypes" label="Case Status to Include
(CSV)">New,Escalated</item>
        <item sortOrder="4" name="ContractStatusTypes" label="Contract Status to Include (CSV)">Draft,In
Approval Process,Activated</item>
        <item sortOrder="5" name="taskType" label="Task Type">Fuze</item>
        <item sortOrder="6" name="CallResultOptions" label="Call Result Options (CSV)">No Answer, Left
Voicemail, Follow-up Required, Transferred</item>
        <item sortOrder="7" name="autoLog" label="Create Case for All Inbound Calls">false</item>
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        <item sortOrder="1" name="autoLinkWithContextRecord" label="Auto Link With Context
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    </section>
</callCenter>
```

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When upgrading a Fuze for Salesforce **package**, you need to create a **new call center** by importing the release-specific **call center XML file**.

Note: If you are installing Fuze for Salesforce for the first time, you can skip this step.

To create a new call center using the XML file:

1. Log in to https://www.salesforce.com using an administrator account.
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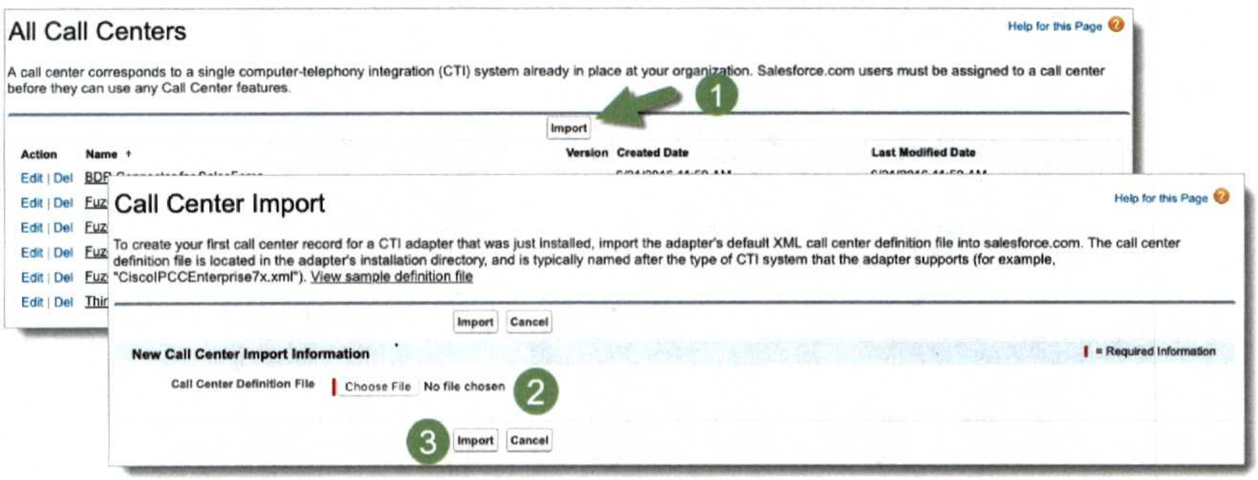

4. Click **Choose File**, navigate to the call center XML file you downloaded, and click **Open**. The XML file is shown on the Call Center Import screen.
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   The call center is imported and you can assign a name to it (e.g., *Fuze for Salesforce [version number]*).

Once you've tested the new call center, you need to manually migrate all settings and users from the **existing call center** to the **new call center** as described in **Step 3**.

Installing or Upgrading Fuze for Salesforce

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Next, you need to import the Fuze for Salesforce XML file to create a new call center. Proceed to **Step 2**.

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To install and deploy Fuze in your Salesforce environment, you must have access to a Salesforce *account* with administrative privileges.

Each Salesforce user at your organization must also have a Fuze user account, and must be using a supported browser from the list below.

Supported Salesforce Editions:	Professional, Enterprise, Unlimited, Performance, or Developer **Note**: Fuze for Salesforce uses the Salesforce REST API which is not freely available with Salesforce Professional Edition. See this KB article from Salesforce for more details about purchasing.
Supported Experiences:	Lightning (Fuze for Salesforce 5.1+), Classic, Console
Supported Browsers:	**Multi-Tab**: Chrome 61+, Firefox 55+ **Single-Tab**: Edge 15+

Additional Information

The Fuze for Salesforce connector is built on Salesforce's Open CTI and REST API libraries, written in JavaScript to embed API calls and processes.

For details on Salesforce's Open CTI library and supported editions, refer to:
https://developer.salesforce.com/docs/atlas.en-us.214.0.api_cti.meta/api_cti/sforce_api_cti_intro.htm

For details on Salesforce's REST API library and supported editions, refer to:
https://developer.salesforce.com/docs/atlas.en-us.208.0.api_tooling.meta/api_tooling/intro_rest_overview.htm

Installation Components and Key Details

Fuze for Salesforce releases can include updates to the following components: the **server side** app, a salesforce **package** (sandbox and production), and a **Call Center XML file**.

While Fuze for Salesforce is not listed in the Salesforce AppExchange, these components are common to all Salesforce apps.

- **Server side** app - This is the ui component of Fuze for Salesforce that is displayed in Salesforce and runs on Fuze servers (similar to a website).

- **Sandbox** and **Production Package** - Fuze for Salesforce packages can include changes to things like the way Fuze interacts with Salesforce objects, new or changed call center settings, new Visualforce pages, etc. Each **package** release includes a **sandbox package** and a **production package**. See Understanding Packages on the Salesforce website for more detail.

- **Call Center XML file** - When you upgrade a **package**, Salesforce does not automatically upgrade the existing **call center**. You need to create a new **call center** using our release-specific **call center xml file**, copy over settings values from the **existing call center** to the **new call center**, and then migrate users from the existing to the **new call center**. One side benefit this provides is that you can have multiple **call centers** operating simultaneously, but with completely different configurations (e.g., one for sales reps, and one for support reps, each with a unique list of call results).

New Installations

The first time you install Fuze for Salesforce, the **package** must be installed, and a new **call center** is also automatically created to which you must migrate your settings and users.

Upgrade Installations

Server side releases - No installation is required. Similar to web apps, new features and improvements included in **server side** releases automatically become available in Fuze for Salesforce.

Releases that include a package - These do require installation of the **package**, creation of a new **call center** via a Fuze-provided XML file, and migration of users and settings to the new **call center**.

Fuze builds updates to **packages** and **call centers** to be backwards compatible with the **server side** to make it easy for you to complete upgrades and migrations at your convenience.

Introduction

Fuze for Salesforce is an app that runs inside Salesforce and pairs Fuze calling features with automatic tracking, matching, and call logging to help your sales and customer support organizations work more efficiently.

This guide describes requirements, key details, and other information about how to install, update, and deploy Fuze for Salesforce.

For details about how to use Fuze for Salesforce, see the Fuze for Salesforce section of our help center.

> The steps described in this guide can be applied to installations of Fuze for Salesforce **5.1-5.4**, however **the installer and XML links are version-specific**. See the article Fuze for Salesforce Installation Files in Fuze Community for all XML and installation files.

> Separate steps are required for upgrading from pre-5.1 versions, and switching to Salesforce Lightning. See the Fuze for Salesforce 5.0 release notes on Fuze Community for detailed steps and installation files.

> A Fuze for Salesforce Configuration and Troubleshooting guide is also available on Fuze Community.

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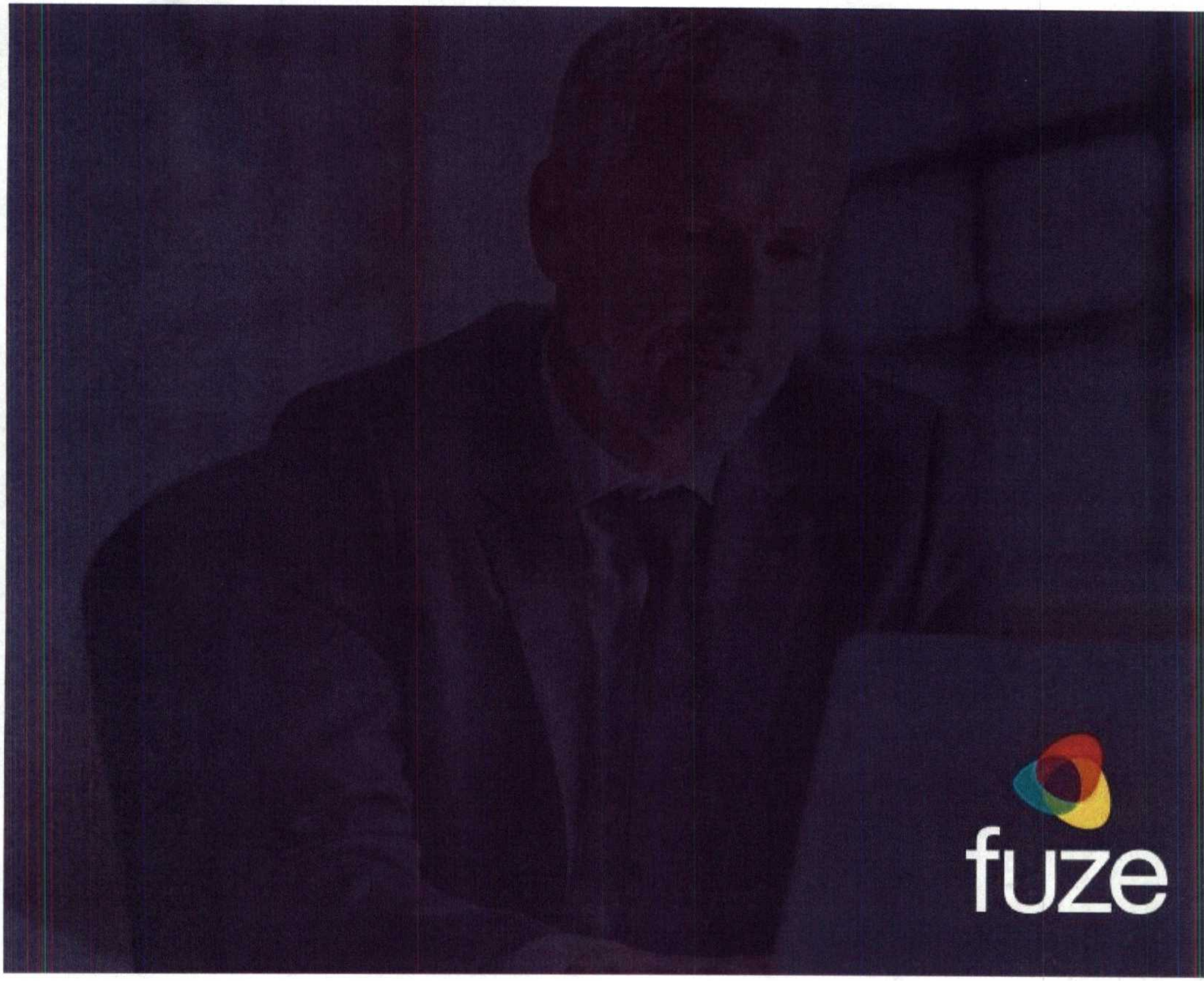

Administrator Guide

Installing Fuze for Salesforce

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