

Salesforce ZIWO CTI Additional Configurations

Guide for Configuring Custom Metadata Types

Custom Metadata Details

1. The objective of creating custom metadata is to configure which objects and fields should be included in the phone number search functionality, without hardcoding them in the system.

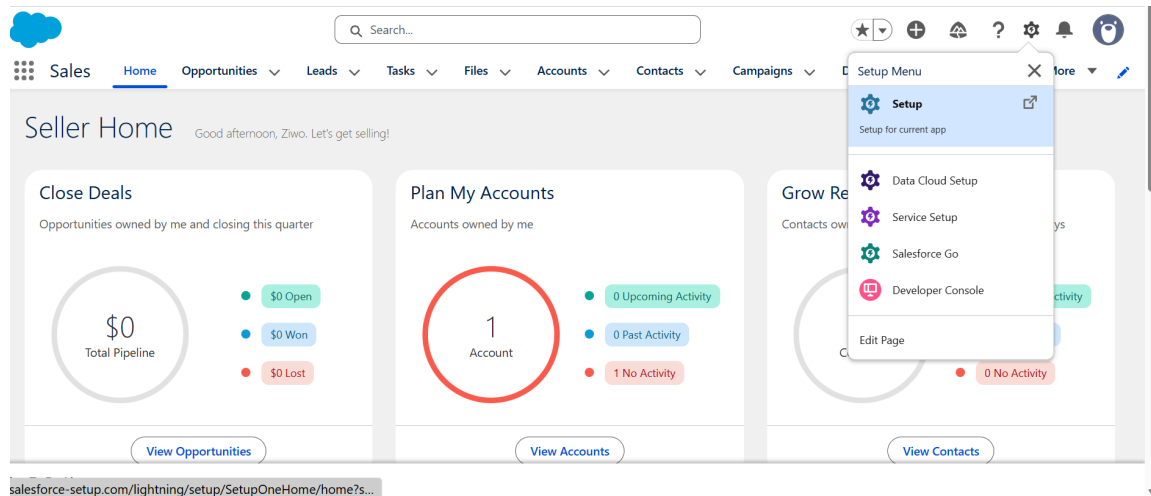
This approach allows:

- Easy addition or removal of objects from search
- Flexibility without requiring code changes
- Centralized control over search behaviour

2. **Custom Objects** can also be included in the search functionality. By adding a custom object and its phone field in the custom metadata configuration, it automatically becomes part of the search process.

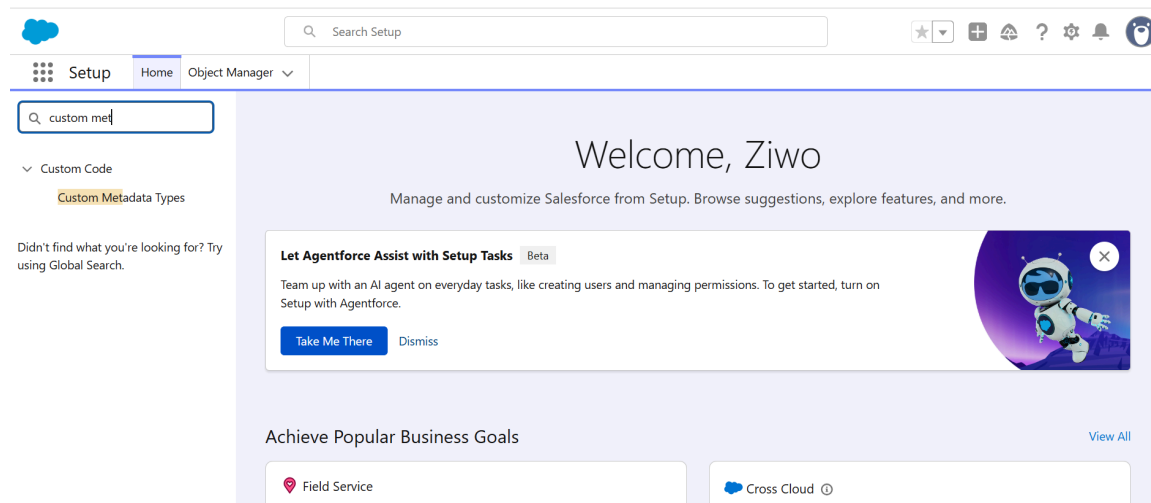
Step 1: Navigate to Setup

Go to Salesforce Setup from the top-right corner.



Step 2: Open Quick Find Box

In the Quick Find box, type 'Custom Metadata'.



Step 3: Select Custom Metadata Types

Click on 'Custom Metadata Types' from the search results.

SetupHomeObject Manager

Q custom meta

Custom CodeCustom Metadata Types

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

SETUPCustom Metadata Types

All Custom Metadata Types

Help for this Page

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define application configurations that need to be migrated from one environment to another, or packaged and installed.
Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, with all the manageability that comes with metadata: package, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

New Custom Metadata Type

Action	Label	Namespace Prefix	Visibility	API Name	Record Size	Description
Del Manage Records	CTI Search Object		Public	CTI_Search_Object__mdt	141	
Del Manage Records	Inbound MissCall Task		Public	Inbound_MissCall_Task__mdt	151	

Step 4: Select 'CTI Search Object'

Click on 'CTI Search Object'

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Step 5: Manage Records

Click on 'Manage CTI Search Objects'.

Setup

Home

Object Manager

custom met

Custom Code

Custom Metadata Types

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Custom Metadata Types

CTI Search Object

Standard Fields (6)

Custom Fields (0)

Validation Rules (0)

Page Layouts (1)

Custom Metadata Type Detail

Edit

Delete

Manage CTI Search Objects

Singular Label	CTI Search Object	Description	
Plural Label	CTI Search Objects	Visibility	Public
Object Name	CTI_Search_Object	Protection Level	
API Name	CTI_Search_Object__mdt	Record Size	141
Created By	Ziwo Marketplace, 4/1/2026, 3:57 AM	Modified By	Ziwo Marketplace, 4/1/2026, 3:57 AM

Standard Fields

Action	Field Label	Field Name	Data Type	Indexed
	Created By	CreatedBy	Lookup(User)	
Edit	Custom Metadata Record Name	DeveloperName	Text(40)	

Step 6: Add New Record

Click on 'New' to create a new record.

Setup

Home

Object Manager

custom met

Custom Code

Custom Metadata Types

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Custom Metadata Types

CTI Search Objects

View: All

Create New View

New

Label +	CTI Search Object Name	Namespace Prefix
No records to display		

Step 7: Enter the Details

Provide the Label, Object Name and Object API Name

SETUP

Custom Metadata Types

CTI Search Object

Help for this Page

CTI Search Object Edit

SaveSave & NewCancel

Information

Required Information

Label

CTI Search Object Name

Object Api Name

Search Fields

Is Active

Protected Component

Save

Save & New

Cancel

Step 8: Configure Search Field & Is Active

In the Search Field, enter 'Phone' and check the 'Is Active' box

SETUP

Custom Metadata Types

CTI Search Object

Help for this Page

CTI Search Object Edit

SaveSave & NewCancel

Information

Required Information

Label

CTI Search Object Name

Object Api Name

Search Fields

Is Active

Protected Component

Account

Account

Account

Phone

☒

☐

Save

Save & New

Cancel

Step 9: Save Record

Click Save to complete the setup.

CTI Search Object

 [Help for this Page](#) 

CTI Search Object Detail

EditDeleteClone

Label	Account	Protected Component	☐
CTI Search Object Name	Account	Namespace Prefix	ziwo
Object Api Name	Account		
Search Fields	Phone		
Is Active	☒		
Created By	Christian Matumona , 12/19/2025 1:49 AM		
	EditDeleteClone	Last Modified By	Christian Matumona , 12/19/2025 1:56 AM