

Metaswitch Salesforce Click-to-Dial

The screenshot displays the Metaswitch Salesforce Click-to-Dial interface. The top navigation bar includes links for Setup, System Log, Help, Logout, and a dropdown menu for Metaswitch Salesforce Click-to-Dial. The main navigation bar features tabs for Home, Leads, Accounts (selected), Contacts, Opportunities, Products, Documents, Click-to-Dial Configuration, and Cases. The left sidebar contains a CommPortal section with a Login button, a Remember me checkbox, and a Logged out status. Below this is the Metaswitch Networks logo and a Custom Links section. The main content area shows the Account Detail for Metaswitch Networks, with a folder icon and the account name. A link to Back to List: Custom Apps is provided. Below the account name, there are links for Contacts (2), Opportunities (0), Cases (3), Open Activities (0), Activity History (3), Notes & Attachments (0), and Partners (0). The Account Detail section includes buttons for Edit, Delete, and Include Offline. The account information is displayed in a table format:

Account Owner	Ashish Tomar [Change]	Rating	Hot
Account Name	Metaswitch Networks [View Hierarchy]	Phone	(604) 698-0550
Parent Account		Click-to-Dial Phone	(604) 698-0550
Account Number		Fax	
Account Site		Website	http://www.metaswitch.com/
Type	Technology Partner	Ticker Symbol	

A green button labeled "<Click Here" is positioned to the right of the Click-to-Dial Phone field.

One button functionality enabling Salesforce to do a 'Click-to-Dial' CommPortal operation while simultaneously opening a new tracking event inside Salesforce.

Screenshots

MetaSwitch Networks Setup System Log Help Logout **MetaSwitch Salesforce Click-to-Dial**

Home Leads Accounts **Contacts** Opportunities Products Documents Click-to-Dial Configuration Cases Reports Dashboards +

CommPortal **Contact** Customize Page | Edit Layout | Printable View | Help for this Page ?

Logout
6046980557: You have 9 new voicemail(s) and 0 missed call(s).

Calling ...Waiting for you to answer your telephone

MetaSwitch Networks

Contact Detail Edit Delete Clone Request Update

<Call Status

Metaswitch Networks
« Back to List: Development Package
[Opportunities \[0\]](#) | [Cases \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[5+\]](#) | [Campaign History \[0\]](#) | [Notes & Attachments \[0\]](#) | [HTML Email Status \[0\]](#)

Account Name	Metaswitch Networks	Home Phone	(604) 698-0559
Title		Phone	(604) 698-0557
Department		Mobile	(604) 698-0558
Birthdate		Click-to-Dial Mobile	(604) 698-0558
Reports To	View Org Chart	Click-to-Dial Home Phone	(604) 698-0559
		Click-to-Dial Phone	(604) 698-0557
		Email	

MetaSwitch Networks Setup System Log Help Logout **MetaSwitch Salesforce Click-to-Dial**

Home Leads **Accounts** Contacts Opportunities Products Documents Click-to-Dial Configuration Cases +

CommPortal **Account** Customize Page | Edit Layout | Printable View | Help for this Page ?

Login ☐ Remember me
Logged out

MetaSwitch Networks

<Configurable Branding

« Back to List: Custom Apps
[Contacts \[2\]](#) | [Opportunities \[0\]](#) | [Cases \[3\]](#) | [Open Activities \[0\]](#) | [Activity History \[3\]](#) | [Notes & Attachments \[0\]](#) | [Partners \[0\]](#)

Delete Include Offline

Account Name	Metaswitch Networks View Hierarchy	Rating	Hot
		Phone	(604) 698-0550

Screenshots

Click-to-Dial Call List

Meta**switch**
Networks

Setup System Log Help Logout

Metaswitch Salesforce Click-to-Dial

Home Leads Accounts Contacts Opportunities Products Documents Click-to-Dial Configuration Cases +

CommPortal

Logout

6046980557: You have 6 new voicemail(s) and 0 missed call(s).

Meta**switch**
Networks

Custom Links

Click-to-Dial

New Lead Change Status Change Owner Add to Campaign

Create New View | Edit | Delete | Refresh

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

☐	Action	Name +	Company	Lead Status	Phone	Click-to-Dial Phone
☐	Edit Del	Young, Andy	Dickenson plc	Closed - Converted	(620) 241-6200	(620) 241-6200
☐	Edit Del	Tomar, Ashish	VersatileCapitalist	Open - Not Contacted	(866) 590-6506	(866) 590-6506
☐	Edit Del	Stumuller, Pat	Pyramid Construction Inc.	Closed - Converted	33562156600	33562156600
☐	Edit Del	Snyder, Kathy	TNR Corp.	Working - Contacted	(860) 273-0123	(860) 273-0123
☐	Edit Del	Rogers, Jack	Burlington Textiles Corp of A...	Closed - Converted	(336) 222-7000	(336) 222-7000
☐	Edit Del	Owenby, Pamela	Hendrickson Trading	Closed - Not Converted	(570) 326-1571	(570) 326-1571

Screenshots

Integrated Call History and Call Duration Reporting

Open Activities

[New Task](#)[New Event](#)[New Meeting Request](#)[Update Call Duration](#)[Open Activities Help](#) ?

Action	Subject	Related To	Task	Due Date	Status	Priority	Assigned To	Call Duration (Seconds)	Click-to-Dial Phone	Call Type
Edit Cls	Call		✓	05/07/2010	In Progress	Normal	Ashish Tomar	53	6046980558	Outgoing Call

Activity History

[Log A Call](#)[Mail Merge](#)[Send An Email](#)[Request Update](#)[View All](#)[Update Call Duration](#)[<Update Duration](#)

Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time	Call Duration (Seconds)	Click-to-Dial Phone	Call Type
Edit Del	Call		✓	05/07/2010	Ashish Tomar	05/07/2010 8:47 AM	40	6046980559	Outgoing Call
Edit Del	Call		✓	05/07/2010	Ashish Tomar	05/07/2010 8:44 AM	45	6046980558	Outgoing Call
Edit Del	Call		✓	05/07/2010	Ashish Tomar	05/07/2010 8:43 AM	47	6046980559	Outgoing Call
Edit Del	Call		✓	05/07/2010	Ashish Tomar	05/07/2010 8:42 AM	64	6046980558	Outgoing Call

Screenshots

Metaswitch
Networks

SetupSystem LogHelpLogoutMetaswitch Salesforce Click-to-Dial

HomeLeadsAccountsContactsOpportunitiesProductsDocumentsClick-to-Dial ConfigurationCases**Reports**Dashboards+

Click-to-Dial Calls This Month(Contacts)

Help for this Page?

Report Generation Status: Complete

Hierarchy: Ashish Tomar

Report Options:

Summarize information by:
Account Name

View
All activities

Show
Open & Completed Activities

Show
Tasks and Events

Time Frame

Date
Date

Duration
This Month

Start Date
01/07/2010

End Date
31/07/2010

Run Report

Hide Details

Customize

Customize Using Report Builder

Save

Save As

Delete

Printable View

Export Details

Subject	Click-to-Dial Phone	Call Duration (seconds)	Call Type	Assigned	Created Date
Account Name: Metaswitch Networks (3 records) 137					
First Name: Metaswitch (3 records) 137					
Call	6046980558	60	Outgoing Call	Ashish Tomar	05/07/2010
Call	6046980559	36	Outgoing Call	Ashish Tomar	05/07/2010
Call	6046980558	41	Outgoing Call	Ashish Tomar	05/07/2010

Click-to-Dial Call Reporting

CommPortal Click-to-Dial

[Edit](#) | [Del](#) | [Export](#)

[Click-to-Dial Calls This Month\(Cases\)](#) – What calls have we handled this month?

[Edit](#) | [Del](#) | [Export](#)

[Click-to-Dial Calls This Month\(Contacts\)](#) – What calls have we handled this month?

[Edit](#) | [Del](#) | [Export](#)

[Click-to-Dial Calls This Month\(Leads\)](#) – What calls have we handled this month?

Application Installation Guide

Audience: Salesforce System Administrators

Prerequisites

This guide assumes a working knowledge of Salesforce configuration and administration (customizing Page Layouts, adding/customizing home page components) and access to Salesforce production, sandbox or a developer account.

Application Installation Guide

Metaswitch Salesforce Click-to-Dial is built natively into Salesforce, to start the installation, simply click on the installation link provided by Metaswitch Networks and follow the Salesforce Installation Wizard step by step.

There is no software for you to install and maintain on your PC or local servers.

Follow the Salesforce Installation Wizard

force.com™
package installer

SALESFORCE.COM

SALESFORCE.COM

Package Installation Details

Help for this Page ?

Package Name Metaswitch Salesforce Click-to-Dial

Version Name 1.9

Version Number 1.9

Publisher Metaswitch Networks

Continue

Cancel

Package Components

▼ Apps (1)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	CommPortal Click-to-Dial		App	This is a brand new component.

▼ Code (2)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	TaskController		Apex Class	This is a brand new component.
Create	InsertConfiguration		Apex Class	This is a brand new component.

Application Configuration Guide

Step 1: Add CommPortal Home Page Component to the Sidebar

Step 2: Add CommPortal Server URL

Step 3: Add Click-to-Dial Fields to Accounts, Contacts, Leads & Cases

Step 4: Add call duration related fields and buttons to accounts, contacts, leads and cases activities related list.

Audience: Salesforce System Administrators

Prerequisites

This guide assumes a working knowledge of Salesforce configuration and administration (customizing Page Layouts, adding/customizing home page components) and access to Salesforce production, sandbox or a developer account.

Step 1: Add CommPortal Home Page Component to the Sidebar

The screenshot shows the Metaswitch Networks Salesforce Click-to-Dial interface. The top navigation bar includes links for Setup, System Log, Help, and Logout, along with the force.com apps logo and a dropdown menu for Metaswitch Salesforce Click-to-Dial. Below the navigation bar is a horizontal menu with tabs for Home, Leads, Accounts, Contacts, Opportunities, Products, Documents, Click-to-Dial Configuration, and Cases. The left sidebar contains a 'Personal Setup' section with links for My Personal Information, Personal Information, Change My Password, Reset My Security Token, My Groups, Change My Display, Grant Login Access, Calendar Sharing, Reminders, Email, Import, and Desktop Integration. The main content area is titled 'Home Page Layouts' and includes a 'Help for this Page' link. It contains a text block stating: 'This page allows you to create different tab layouts for the Home Tab.' Below this is a search bar with letters A through Z and an 'All' button. A table titled 'Page Layout Assignment' with a 'New' button is displayed. The table has columns for Action, Name, Created By, and Last Modified By. The table contains one row with the following data:

Action	Name	Created By	Last Modified By
Edit Del	Default	Ashish Tomar, 12/04/2010 9:09 AM	Ashish Tomar, 31/05/2010 6:14 AM

Below the table is another search bar with letters A through Z and an 'All' button.

Click **Setup** | **App Setup** | **Customize** | **Home** | **Home Page Layouts** | **Edit**.

Step 1: Add CommPortal Home Page Component to the Sidebar

Metaswitch
Networks

Setup · System Log · Help · Logout

force.com
apps

Metaswitch Salesforce Click-to-Dial

Home

Leads

Accounts

Contacts

Opportunities

Products

Documents

Click-to-Dial Configuration

Cases

Personal Setup

My Personal Information

Personal Information

Change My Password

Reset My Security Token

My Groups

Change My Display

Grant Login Access

Calendar Sharing

Reminders

Email

Import

Desktop Integration

App Setup

Customize

Tab Names and Labels

Home

Home Page Components

Home Page Layouts

Custom Links

Activities

Edit Home Layout

Help for this Page

Step 1. Select the components to show

Step 1 of 2

Choose the components to include on your home page layout.

Layout Name

Default

Select Wide Components to Show

= Required Information

Items To Approve	☒	Calendar	☒
Tasks	☒	Dashboard Snapshot	☒

Select Narrow Components to Show

Search	☒	Create New...	☒
Document Search	☐	Recent Items	☒
Solution Search	☐	Messages & Alerts	☐
Product Search	☐	Custom Links	☒
Tags	☒	Customer Portal Welcome	☐
CommPortal	☒		

Next

Cancel

Select CommPortal

Step 1: Add CommPortal Home Page Component to the Sidebar

The screenshot shows the Metaswitch Networks Salesforce Click-to-Dial interface. The top navigation bar includes links for Setup, System Log, Help, and Logout, along with the force.com apps logo and a dropdown menu for Metaswitch Salesforce Click-to-Dial. Below this is a horizontal menu with tabs for Home, Leads, Accounts, Contacts, Opportunities, Products, Documents, Click-to-Dial Configuration, and Cases. The left sidebar contains two sections: 'Personal Setup' with links to My Personal Information, Email, Import, and Desktop Integration; and 'App Setup' with links to Customize (Tab Names and Labels, Home, Custom Links), Activities, Campaigns, Leads, Accounts, Contacts, and Opportunities. The main content area is titled 'Edit Home Layout' and includes a 'Help for this Page' link. Below this is a section titled 'Step 2. Order the components' with the instruction 'Arrange the components on your home page.' This section contains two columns: 'Narrow (Left) Column' and 'Wide (Right) Column'. The 'Narrow (Left) Column' lists components: CommPortal, Custom Links, Create New..., Search, Tags, and Recent Items. The 'Wide (Right) Column' lists components: Calendar, Tasks, Items To Approve, and Dashboard Snapshot. Both columns have 'Top', 'Up', 'Down', and 'Bottom' buttons for reordering. At the bottom right of the main content area are buttons for Previous, Save & Assign, Save, Preview, and Cancel.

Metaswitch Networks

Setup • System Log • Help • Logout

force.com apps Metaswitch Salesforce Click-to-Dial

Home Leads Accounts Contacts Opportunities Products Documents Click-to-Dial Configuration Cases

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
 - Tab Names and Labels
 - Home
 - Home Page Components
 - Home Page Layouts
 - Custom Links
- Activities
- Campaigns
- Leads
- Accounts
- Contacts
- Opportunities

Edit Home Layout [Help for this Page](#)

Step 2. Order the components Step 2 of 2

Arrange the components on your home page.

Narrow (Left) Column		Wide (Right) Column
CommPortal	Top	Calendar
Custom Links	Up	Tasks
Create New...	Up	Items To Approve
Search	Down	Dashboard Snapshot
Tags	Down	
Recent Items	Bottom	

Previous Save & Assign Save Preview Cancel

Move CommPortal Component to the Top

Step 1: Add CommPortal Home Page Component to the Sidebar

The screenshot shows the Salesforce App Setup interface. On the left, a sidebar lists various setup categories. The main area displays the 'User Interface' settings, which are organized into sections: User Interface, Sidebar, Calendar, and Setup. The 'Sidebar' section is currently selected, and the 'Show Custom Sidebar Components on All Pages' option is highlighted with a blue background.

App Setup

- Import
- Desktop Integration
- App Setup**
- Customize
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Contacts
 - Opportunities
 - Quotes New!
 - Forecasts
 - Cases
 - Entitlement Management
 - Self-Service
 - Call Center
 - Contracts
 - Solutions
 - Products
 - Partners
 - Salesforce to Salesforce
 - Customer Portal
 - Ideas
 - Answers
 - Assets
 - Users
 - Console
 - Salesforce CRM Content
 - Content Deliveries
 - Tags
 - Reports & Dashboards
 - Search
 - User Interface
- Create

User Interface

- ☒ Enable Collapsible Sections
- ☒ Show Quick Create
- ☒ Enable Hover Details
- ☒ Enable Related List Hover Links
- ☒ Enable Separate Loading of Related Lists
- ☒ Enable Inline Editing
- ☒ Enable Enhanced Lists
- ☒ Enable New User Interface Theme
- ☒ Enable Printable List Views
- ☒ Enable Spell Checker
- ☐ Enable Spell Checker on Tasks and Events

Sidebar

- ☒ Enable Collapsible Sidebar
- ☒ Show Custom Sidebar Components on All Pages

Calendar

- ☒ Enable Home Page Hover Links for Events
- ☒ Enable Drag-and-Drop Editing on Calendar Views
 - ☐ Enable Click-and-Create Events on Calendar Views
 - ☐ Enable Drag-and-Drop Scheduling on List Views
- ☒ Enable Hover Links for My Tasks list

Setup

- ☒ Enable Enhanced Page Layout Editor
- ☐ Enable Enhanced Profile Management

Save **Cancel**

- 1: Click **Setup** | **App Setup** | **Customize** | **User Interface**
- 2: **Enable** “Show Custom Sidebar Component on All Pages”
- 3: Click **Save**

Step 2: Add CommPortal Server URL

The screenshot shows the Metaswitch Networks Salesforce interface. The top navigation bar includes links for Setup, System Log, Help, and Logout, along with the force.com apps logo and a dropdown for Metaswitch Salesforce Click-to-Dial. Below this is a secondary navigation bar with tabs for Home, Leads, Accounts, Contacts, Opportunities, Products, Documents, Click-to-Dial Configuration, and Cases. The left sidebar contains two main sections: 'Personal Setup' with links to My Personal Information, Email, Import, and Desktop Integration; and 'App Setup' with a tree view where 'Home Page Components' is selected under 'Home'. The main content area is titled 'Home Page Components' and includes a 'Help for this Page' link. It contains a descriptive paragraph and two tables. The first table, 'Standard Components', lists various components like Search, Create New..., Recent Items, Messages & Alerts, Custom Links, Solution Search, Document Search, Product Search, Customer Portal Welcome, Dashboard Snapshot, Items To Approve, Calendar, and Tasks, each with an Action Name, Component Type, and Available In Column. The second table, 'Custom Components', shows a single entry for 'CommPortal' with an Action Name, Name, Type (HTML Area), Created By (Ashish Tomar), and Modified By (Ashish Tomar).

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
 - Tab Names and Labels
 - Home
 - Home Page Components
 - Home Page Layouts
 - Custom Links
- Activities
- Campaigns
- Leads
- Accounts
- Contacts
- Opportunities
- Quotes **New!**
- Forecasts
- Cases
- Entitlement Management
- Self-Service
- Call Center
- Contracts
- Solutions
- Products
- Partners
- Salesforce to Salesforce

Home Page Components [Help for this Page](#)

This page allows you to create and edit components that may be shown on one or more home page layouts.

Standard Components

Action	Name	Component Type	Available In Column
	Search	Search	Left/Narrow
	Create New...	Create New...	Left/Narrow
	Recent Items	Recent Items	Left/Narrow
Edit	Messages & Alerts	Note	Left/Narrow
Edit	Custom Links	Links	Left/Narrow
	Solution Search	Search	Left/Narrow
	Document Search	Search	Left/Narrow
	Product Search	Search	Left/Narrow
	Customer Portal Welcome	Customer Portal Welcome	Left/Narrow
	Dashboard Snapshot i	Dashboard	Right/Wide
	Items To Approve i	Items To Approve	Right/Wide
	Calendar	Calendar	Right/Wide
	Tasks	Tasks	Right/Wide

Custom Components [New](#)

Action	Name	Type	Created By	Modified By
Edit Del	CommPortal	HTML Area	Ashish Tomar, 16/04/2010 11:02 PM	Ashish Tomar, 31/05/2010 6:23 AM

- 1:Click **Setup** | **Customize** | **Home** | **Home Page Components**.
- 2:Click **Edit** next to the CommPortal under Custom Components

Metaswitch Networks

force.com
apps

Metaswitch Salesforce Click-to-Dial ▼

Home Leads Accounts Contacts Opportunities Products Documents Click-to-Dial Configuration Cases

- ⊕ My Personal Information
- ⊕ Email
- ⊕ Import
- ⊕ Desktop Integration

- Customize
 - Tab Names and Labels
 - Home
 - Home Page Components
 - Home Page Layouts
 - Custom Links
- Activities
- Campaigns
- Leads
- Accounts
- Contacts
- Opportunities
- Quotes **New!**
- Forecasts
- Cases
- Entitlement Management
- Self-Service
- Call Center
- Contracts
- Solutions
- Products
- Partners
- Salesforce to Salesforce

[Help for this Page](#)

Save Cancel

Name | CommPortal

Narrow (Left) Column

Note: Please ensure that the HTML code entered below is valid, well formed HTML. Poorly written HTML in this component may cause the entire Home tab to appear incorrectly.

Formatting Controls [[How to use this](#)]

☒ Show HTML

```
<script src="/resource/1273683913000/ClickToDial"></script><script>var commPortalSeverURL = 'http://cpsandbox.innovators.metaswitch.com/cust1'; var enableComponent = false; var locatioPageName = location.href; var whoId = getRequestParameter(who_id); var whatId = getRequestParameter(what_id); var lastPosition = locatioPageName.lastIndexOf("/"); locatioPageName = locatioPageName.substring(lastPosition+1); if((locatioPageName.length > 0 && (locatioPageName.substring(0,3) == '003' || locatioPageName.substring(0,3) == '001' || locatioPageName.substring(0,3) == '00Q' || locatioPageName.substring(0,3) == '500') || ((whoId != null && whoId != '') || (whatId != null && whatId != ''))) {enableComponent = true; } else {enableComponent = false; }</script><script type="text/javascript" src="/soap/ajax/16.0/connection.js"></script><script src="/soap/ajax/16.0/apex.js" type="text/javascript"></script><script src="/resource/1271583098000/commportal"></script><table><tbody><tr><td><input class="btn" value="Login" onclick="doLoginCommPortal(commPortalSeverURL);return false;" id="btnLogin" style="display: none; type="button"></td><td><div id="divRememberMe" style="display: none;"><input id="rememberMe" type="checkbox"><label id="labelRememberMe"></label><h2>&nbsp;&nbsp;&&nbsp;&nbsp;&Remember me</h2><h2></h2></div></td></tr></tbody></table><input class="btn" value="Logout" onclick="doLogoutCommPortal(connection);return false;" id="btnLogout" style="display: none; type="button"><div id="userActionStates">Initiate Click-to-Dial outgoing calls from contacts, accounts, cases or leads detail screen</div><div style="height: 25px;"></div><div id="statusMessage"></div><iframe src="/apex/ComponentImage" id="componentImage" name="componentImage" scrolling="no" frameborder="0" height="50px" width="180px"></iframe><script>if(enableComponent){document.getElementById('btnLogin').style.display =
```

3:Provide CommPortal Server URL (unique to the customer)

Step 2: Add CommPortal Server URL

The screenshot shows the MetaSwitch Networks web interface. At the top, there is a navigation bar with the MetaSwitch Networks logo on the left and links for Setup, System Log, Help, Logout, and a dropdown menu for 'Metaswitch Salesforce Click-to-Dial'. Below this is a secondary navigation bar with tabs for Home, Leads, Accounts, Contacts, Opportunities, Products, Documents, Click-to-Dial Configuration (which is highlighted), and Cases. On the left side, there is a sidebar with a 'CommPortal' section. This section contains a description: 'Initiate Click-to-Dial outgoing calls from contacts, accounts, cases or leads detail screen' and the MetaSwitch Networks logo. The main content area of the 'Click-to-Dial Configuration' tab shows a table with two rows. Each row has a label 'CommPortal URL' and a text input field. The first input field contains the text 'http://cpsandbox.innovator'. Below each input field is a button labeled 'Insert Configuration'.

CommPortal URL	http://cpsandbox.innovator
	Insert Configuration
	Insert Configuration

- 1: Select CommPortal Click-to-Dial Application from Force.com App Menu (top right)
- 2: Go To Click-to-Dial Configuration tab
- 3: Specify Complete CommPortal Server URL (<http://mycomportal.com/cust1/>)
- 4: Click Insert Configuration.

Step 3: Add Click-to-Dial Formula Fields to Accounts, Contacts, Leads and Cases

Metaswitch Networks Setup · System Log · Help · Logout force.com apps Metaswitch Salesforce Click-to-Dial

Home Leads Accounts Contacts Opportunities Products Documents Click-to-Dial Configuration Cases

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Contacts
 - Fields
 - Related Lookup Filters **New!**
 - Validation Rules
 - Triggers
 - Page Layouts
 - Search Layouts
 - Buttons and Links
 - Record Types
- Opportunities
- Quotes **New!**

Contact Layout Mini Page Layout Mini Console View Video Tutorial Help for this Page

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Quick Find Field Name

Blank Space	Asst. Phone	Click-to-Dial Phone	Description	Fax	Last Modified By	Level
Section	Birthdate	Contact Owner	Do Not Call	Fax Opt Out	Last Stay-in-Touc...	Mailing Address
Account Name	Click-to-Dial Hom...	Created By	Email	Home Phone	Last Stay-in-Touc...	Mobile
Assistant	Click-to-Dial Mobile	Department	Email Opt Out	Languages	Lead Source	Name

Contact Sample

Standard Buttons

Contact Detail Edit Delete Clone Sharing Request Update View Self-Service Enable Self-Service Enable Customer Portal User Enable Partner Portal Login View Customer Po

Custom Buttons

Contact Information (Header visible on edit only)

Contact Owner	Sample User	Home Phone	1-415-555-1212
Name	Sarah Sample	Phone	1-415-555-1212
Account Name	Sample Account	Mobile	1-415-555-1212
Title	Sample Title	Click-to-Dial Mobile	Sample Click-to-Dial
Department	Sample Department	Click-to-Dial Home Phone	Sample Click-to-Dial
Birthdate	16/06/2010	Click-to-Dial Phone	Sample Click-to-Dial

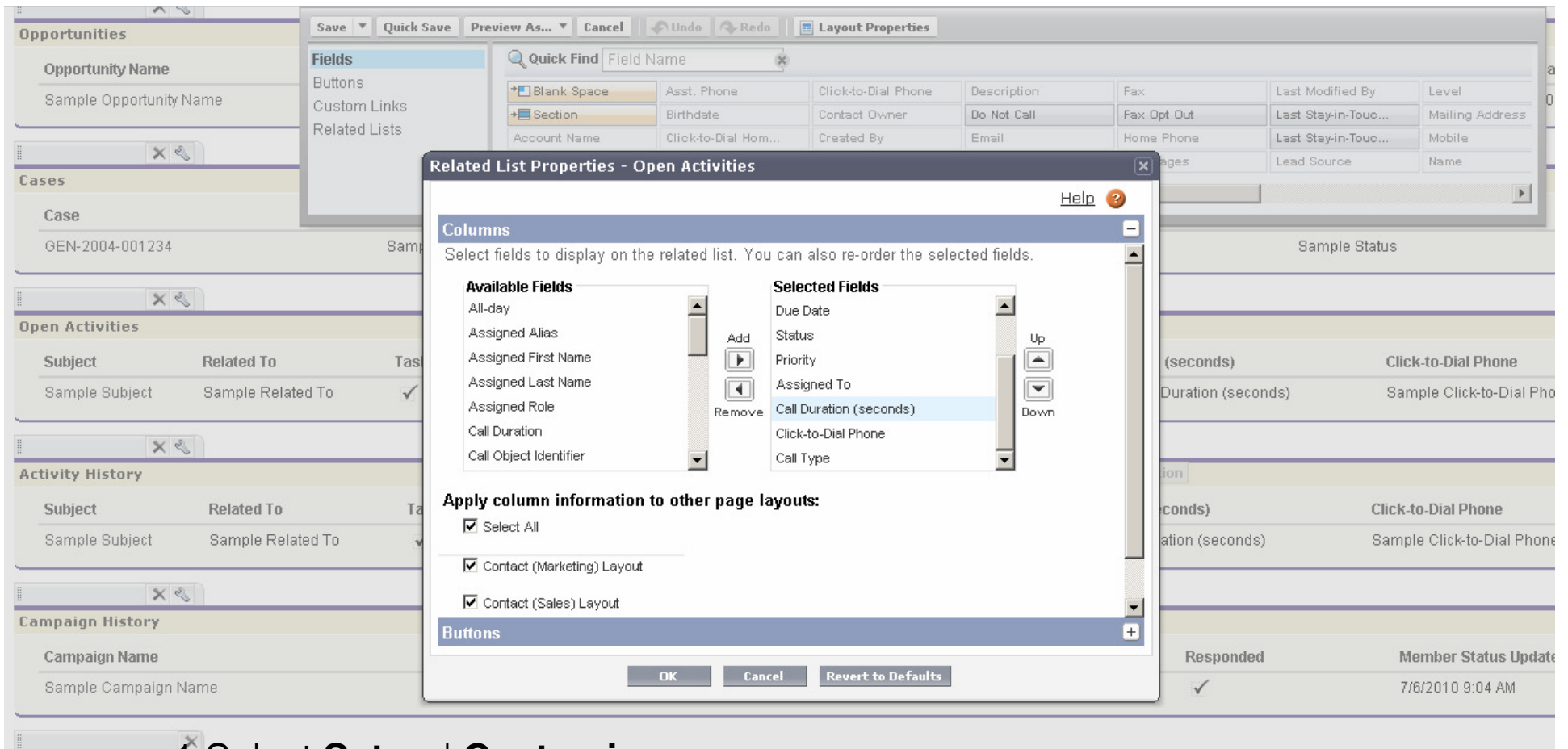
1:Select **Setup | Customize**.

2:Choose Accounts, Contacts, Leads or Cases .

3:Choose the **Page Layouts** link and click **Edit** next to the page layout

4:Drag-and-drop Phone, Home Phone & Mobile Fields

Step 4: Add call duration related fields and buttons to accounts, contacts, leads and cases activities related list.



1:Select **Setup | Customize**.

2:Choose Accounts, Contacts, Leads or Cases .

3:Choose the **Page Layouts** link and click **Edit** next to the page layout

4:Customize Open Activities & Activity History related list

Application Branding Guide

The screenshot displays the Metaswitch Networks Salesforce interface. The top navigation bar includes the Metaswitch Networks logo, a green callout box labeled "<Application Logo", and links for Setup, System Log, Help, Logout, and a dropdown menu for "Metaswitch Salesforce Click-to-Dial". Below this is a secondary navigation bar with tabs for Home, Leads, Accounts, Contacts, Opportunities, Products, Documents, Click-to-Dial Configuration, Cases, Reports, and Dashboards. The main content area shows a "Contact" record for "Metaswitch Networks". A green callout box labeled "<Home Component Logo" points to the Metaswitch Networks logo in the left sidebar. The contact details include fields for Contact Owner (Ashish Tomar), Home Phone, Phone, Mobile, Click-to-Dial Mobile, Click-to-Dial Home Phone, Click-to-Dial Phone, and Email. A green callout box labeled "<Icons" points to the icons used for the Click-to-Dial fields. The interface also features a "Logout" button, a "Calling ...Waiting for you to answer your telephone" status, and a "Custom Links" section.

Change colors, fonts, images and text strings to suit your corporate image (for example to match your company's website and include your own company and product logos), without altering the overall structure and function of the interface.

Audience: Salesforce System Administrators

Steps to Customize Home Component Logo or Click-to-Dial Icons

The screenshot shows the Metaswitch Networks Salesforce Click-to-Dial interface. The top navigation bar includes links for Setup, System Log, Help, and Logout. The left sidebar contains sections for Personal Setup (My Personal Information, Email, Import, Desktop Integration) and App Setup (Customize, Create, Develop, Apex Classes, Apex Triggers, API, Components, Custom Settings, Email Services, Pages, Sites, Static Resources, Tools, Remote Access). The main content area is titled 'Static Resources' and includes a 'Help for this Page' link. Below the title, there is a description: 'Use static resources to upload content that you want to reference in a Visualforce page, including .zip and .jar files, images, stylesheets, JavaScript, and other files.' A 'View:' dropdown is set to 'All', and a 'Create New View' link is present. A alphabetical index bar is shown below the description. The main table lists static resources with columns for Action, Name, Namespace Prefix, Description, MIME Type, Size, Created By Alias, Created Date, and Cache Control. The table contains 9 rows of data, including resources for 'cell', 'ClickToDial', 'commportal', 'CompanyLogo', 'home', 'json2', 'phone', and 'work'.

Action	Name	Namespace Prefix	Description	MIME Type	Size	Created By Alias	Created Date	Cache Control
Edit Del	cell		icon	image/gif	628	atomar	12/05/2010	Public
Edit Del	ClickToDial		CommPortal:Salesforce integration	application/x-javascript	13,470	bsharma	18/04/2010	Public
Edit Del	commportal		commportal javascript sdkv7.0	application/x-javascript	100,325	atomar	14/04/2010	Public
Edit Del	CompanyLogo		Home component company logo	image/png	5,823	bsharma	19/04/2010	Public
Edit Del	home		icon	image/gif	644	atomar	12/05/2010	Public
Edit Del	json2		commportal javascript sdkv7.0	application/x-javascript	17,454	atomar	12/05/2010	Public
Edit Del	phone		icon	image/gif	650	atomar	12/05/2010	Public
Edit Del	work		icon	image/gif	670	atomar	12/05/2010	Public

- 1: Click **Setup** | **Develop** | **Static Resources** to display the Branding Images.
- 2: Click **Edit** next to the CompanyLogo to upload your own Logo.
- 3: Click **Edit** next to cell, home, phone or work to upload your own version of Icons.

Steps to Customize Home Component Logo or Click-to-Dial Icons

The screenshot shows the Metaswitch Salesforce Click-to-Dial interface. The top navigation bar includes links for Setup, System Log, Help, and Logout, along with the force.com apps logo and a dropdown menu for Metaswitch Salesforce Click-to-Dial. Below this is a secondary navigation bar with tabs for Home, Leads, Accounts, Contacts, Opportunities, Products, Documents, Click-to-Dial Configuration, and Cases. The left sidebar contains two main sections: Personal Setup (My Personal Information, Email, Import, Desktop Integration) and App Setup (Customize, Create, Develop, Apex Classes, Apex Triggers, API, Components, Custom Settings, Email Services, Pages, Sites, Static Resources, Tools, Remote Access). The main content area is titled 'Static Resource CompanyLogo' and includes a 'Help for this Page' link. Below the title bar is a 'Static Resource Edit' section with 'Save' and 'Cancel' buttons. The 'Static Resource Information' section contains the following fields: Name (CompanyLogo), Description (Home component company logo), File (Choose File button, No file chosen), and Cache Control (Public dropdown). A legend indicates that a red bar next to a field name signifies required information.

Metaswitch Networks

Setup • System Log • Help • Logout

force.com apps Metaswitch Salesforce Click-to-Dial

Home Leads Accounts Contacts Opportunities Products Documents Click-to-Dial Configuration Cases

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
- Create
- Develop
 - Apex Classes
 - Apex Triggers
 - API
 - Components
 - Custom Settings
 - Email Services
 - Pages
 - Sites
 - Static Resources
 - Tools
 - Remote Access

Static Resource CompanyLogo [Help for this Page](#)

Static Resource Edit

Static Resource Information | = Required Information

Name

Description

File No file chosen

Cache Control

- 1: Click **Choose File** to upload your own Image.
- 2: Click **Save**

Steps to Customize Application Logo

The screenshot displays the MetaSwitch Networks application interface. At the top, the MetaSwitch Networks logo is on the left, and navigation links (Setup, System Log, Help, Logout) and a user profile dropdown (Metaswitch Salesforce Click-to-Dial) are on the right. Below this is a horizontal menu with tabs: Home, Leads, Accounts, Contacts, Opportunities, Products, Documents (active), Click-to-Dial Configuration, and Cases. The left sidebar contains a 'CommPortal' section with a description, a MetaSwitch Networks logo, and a 'Custom Links' section. The main content area is titled 'Documents Home' and includes a search bar with the text 'Enter keywords to find matching documents.' and a 'Find Document' button. Below the search bar is a 'Document Folders' section with a dropdown menu set to 'CommPortal', a 'Go!' button, and links for 'Edit' and 'Create New Folder'. At the bottom is a 'Recent Documents' section with a 'New' button and a 'Recently Viewed' dropdown. A table lists recent documents with columns for Name, Description, and Type. The first entry is 'MetaSwitchNetworksLogo' with type 'png'.

MetaSwitch Networks

Setup System Log Help Logout **Metaswitch Salesforce Click-to-Dial**

Home Leads Accounts Contacts Opportunities Products **Documents** Click-to-Dial Configuration Cases +

CommPortal

Initiate Click-to-Dial outgoing calls from contacts, accounts, cases or leads detail screen

MetaSwitch Networks

Custom Links

Create New...

Documents Home

Tell me more! | Help for this Page ?

Enter keywords to find matching documents.

Find Document

Document Folders

Folder Go! Edit | Create New Folder

Recent Documents New Recently Viewed

Name	Description	Type
MetaSwitchNetworksLogo		png

Upload and Save New Application Logo to Your Documents Tab

Here are some tips for the application logo image:

1. The image must be in GIF or JPEG format
2. The image file size needs to be less than 20 KB
3. If the image is larger than 300 pixels by 55 pixels high, then it will be scaled to fit.
4. For the best display on-screen, use an image with a transparent background.
5. The Externally Available checkbox must be selected on the document's properties

Steps to Customize Application Logo

The screenshot shows the Metaswitch Networks Salesforce interface. The top navigation bar includes links for Setup, System Log, Help, and Logout, along with the force.com apps logo and a Metaswitch Salesforce Click-to-Dial button. Below this is a horizontal menu with tabs for Home, Leads, Accounts, Contacts, Opportunities, Products, Documents, Click-to-Dial Configuration, and Cases. The left sidebar contains a 'Personal Setup' section with links to My Personal Information, Email, Import, and Desktop Integration. Below that is an 'App Setup' section with links to Customize, Create (which is expanded to show Apps, Custom Labels, Objects, Packages, Report Types, and Tabs), Workflow & Approvals, Develop, and Deploy (with sub-links for View Installed Packages and Critical Updates). At the bottom of the sidebar is an 'Administration Setup' section. The main content area is titled 'Apps' and includes a 'Help for this Page' link. It contains a paragraph explaining that an 'app' is a group of tabs that works as a unit to provide application functionality, and another paragraph stating that the Force.com platform is the on-demand multitasking environment offered by salesforce.com. A 'Note' indicates that custom apps work in conjunction with User Profile Tab Visibility settings and provides a link to view User Profiles. Below the text is a table titled 'Apps' with columns for Action, App Label, Custom, and Description. The table lists several apps, including Call Center, Community, Force.com, Marketing, Metaswitch Salesforce Click-to-Dial, Platform, and Sales. The 'Metaswitch Salesforce Click-to-Dial' app is highlighted with a blue background and has a checkmark in the 'Custom' column.

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
- Create
 - Apps
 - Custom Labels
 - Objects
 - Packages
 - Report Types
 - Tabs
- Workflow & Approvals
- Develop
- Deploy
 - View Installed Packages
 - Critical Updates

Administration Setup

Apps [Help for this Page](#)

An "app" is a group of tabs that works as a unit to provide application functionality. You can customize the standard apps provided by salesforce.com to match the way you work, or you can build your own on-demand apps by grouping standard and custom tabs into new custom apps. With custom apps, you can extend the kinds of information that you manage and share online beyond CRM.

The Force.com platform is the on-demand multitasking environment offered by salesforce.com. It enables users to switch between apps with a single click, through the Force.com AppExchange menu which displays at the top of every page.

Note: Custom apps work in conjunction with User Profile Tab Visibility settings. [Click here](#) to view User Profiles now.

Action	App Label	Custom	Description
Edit	Call Center	☐	State-of-the-Art On-Demand Customer Service
Edit	Community	☐	Salesforce CRM Communities
Edit Del	Force.com	☒	Start Here
Edit	Marketing	☐	Best-in-class on-demand marketing automation
Edit Del	Metaswitch Salesforce Click-to-Dial	☒	Metaswitch Salesforce Click-to-Dial
Edit	Platform	☐	The fundamental Force.com platform
Edit	Sales	☐	The world's most popular sales force automation (SFA) solution

1: Go To **Setup** | App Setup | **Create** | **Apps**.

2: Click **Edit** next to the Metaswitch Salesforce Click-to-Dial.

Steps to Customize Application Logo

The screenshot shows the Metaswitch Networks interface for configuring the 'Metaswitch Salesforce Click-to-Dial' app. The left sidebar contains navigation links for Personal Setup, App Setup, and Workflow & Approvals. The main content area is titled 'App Metaswitch Salesforce Click-to-Dial' and includes a 'Custom App Edit' section with fields for App Label, App Name, and Description. A 'Choose the Image Source for the Custom App Logo' section features an 'Insert an image' button. An 'Attach File - Google Chrome' window is open, displaying a file picker interface with a table of available files.

App Label: Metaswitch Salesforce Click-to-Dial

App Name: Metaswitch_Salesforce_C

Description: Metaswitch Salesforce Click-to-Dial

Choose the Image Source for the Custom App Logo: Insert an image

Attach File - Google Chrome

File Location: CommPortal

Only files 20K or smaller are shown.

Name	Author	Size	Internal Use Only
MetaSwitchNetworksLogo	atomar	6KB	☐

- 1: Click **Insert an image** to choose an image file from the document library.
- 2: **Save**