

Salesforce CTI Integration Setup Guide

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Cloud Agent Settings for Salesforce OpenCTI Integration:

Log into Cloud Agent admin panel & cross-check if below settings are done:



SalesForce		Phone Feild ID	0
	IS_SAVE_LOG		<input checked="" type="checkbox"/>
	Log Each Call as		Task
	Log Associate To	Contact#Lead#Account#Opportunity	<input type="button" value="Edit"/>
	Recording URL	AudioFile_c	<input type="button" value="Edit"/>
	Associate2ActivePage	true	<input type="button" value="Edit"/>
	ScreenPop Type	salesforce	<input type="button" value="Edit"/>

Install and Configure Demo Adapter:

Follow 4 steps mentioned by Salesforce to install Adapter from the following link

https://developer.salesforce.com/page/Lightning_Open_CTI

Configure softphone in Salesforce Overview:

1. In Salesforce org, go to Setup and enter Call Centers in the Quick Find box, then click Call Centers.
2. Click Edit next to the Demo Call Center Adapter and make sure that the CTI Adapter URL points to the following URL.

https://agent1.cloudagent.in/OCCDV2/cloudagent/agent_toolbar_common.jsp

Setup Home Object Manager

CALL CENTERS

- Feature Settings
 - Service
 - Call Center
- Call Centers

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

SETUP Call Centers

Call Center
Demo Call Center Adapter
 All Call Centers » Demo Call Center Adapter

Call Center Detail Edit Delete Clone

General Information

InternalName	OpenCTI
Display Name	Demo Call Center Adapter
CTI Adapter URL	https://agent1.cloudagent.in/OCCDV2/cloudagent/agent_toolbar_common.jsp
CTI Adapter URL2	https://agent2.cloudagent.in/OCCDV2/cloudagent/agent_toolbar_common.jsp
Timeout	10000
Use CTI API	true
Softphone Height	550
Softphone Width	400
Salesforce Compatibility Mode	Classic_and_Lightning

Note: Ozonetel CTI works for Classic & Lightning.

3. Add the agents under Manager Users

CALL CENTERS

- Feature Settings
 - Service
 - Call Center
- Call Centers

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

SETUP Call Centers

Call Center
Demo Call Center Adapter: Manage Users
 All Call Centers » Demo Call Center Adapter » Manage Users

View: All [Create New View](#)

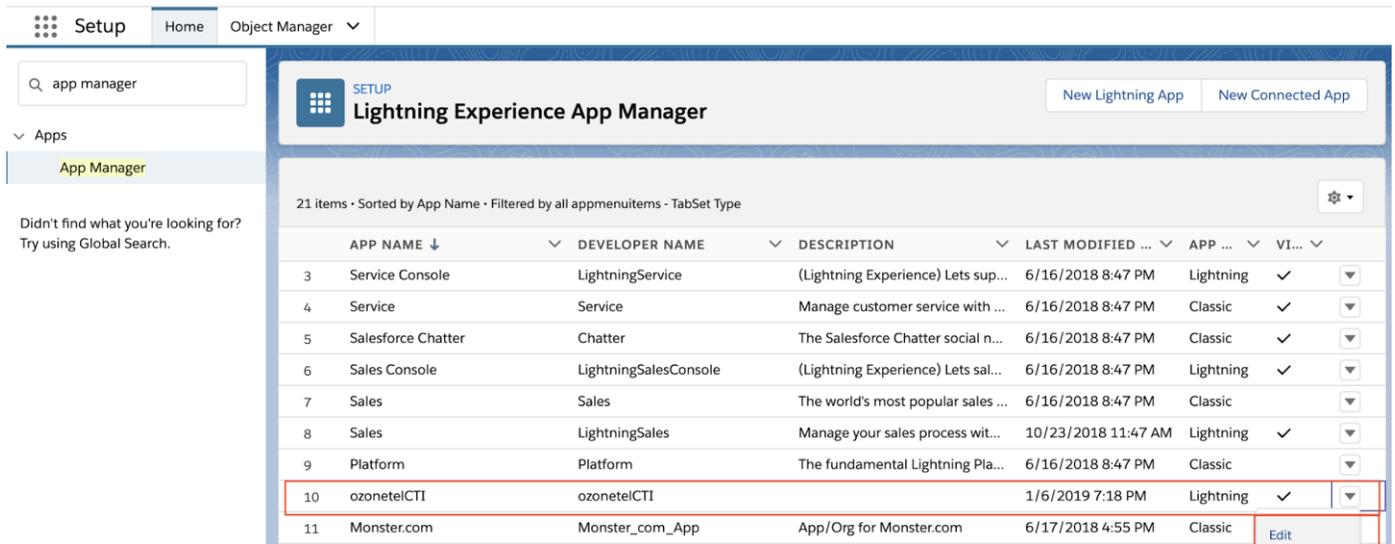
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U

[Add More Users](#) [Remove Users](#)

Action	Full Name ↑	Alias	Username	Role	Profile
<input type="checkbox"/> Remove	Das_Dev	DDas	devjbbpriya@gmail.com		System Administrator

Configure Cloud Agent CTI Phone for Lightning edition:

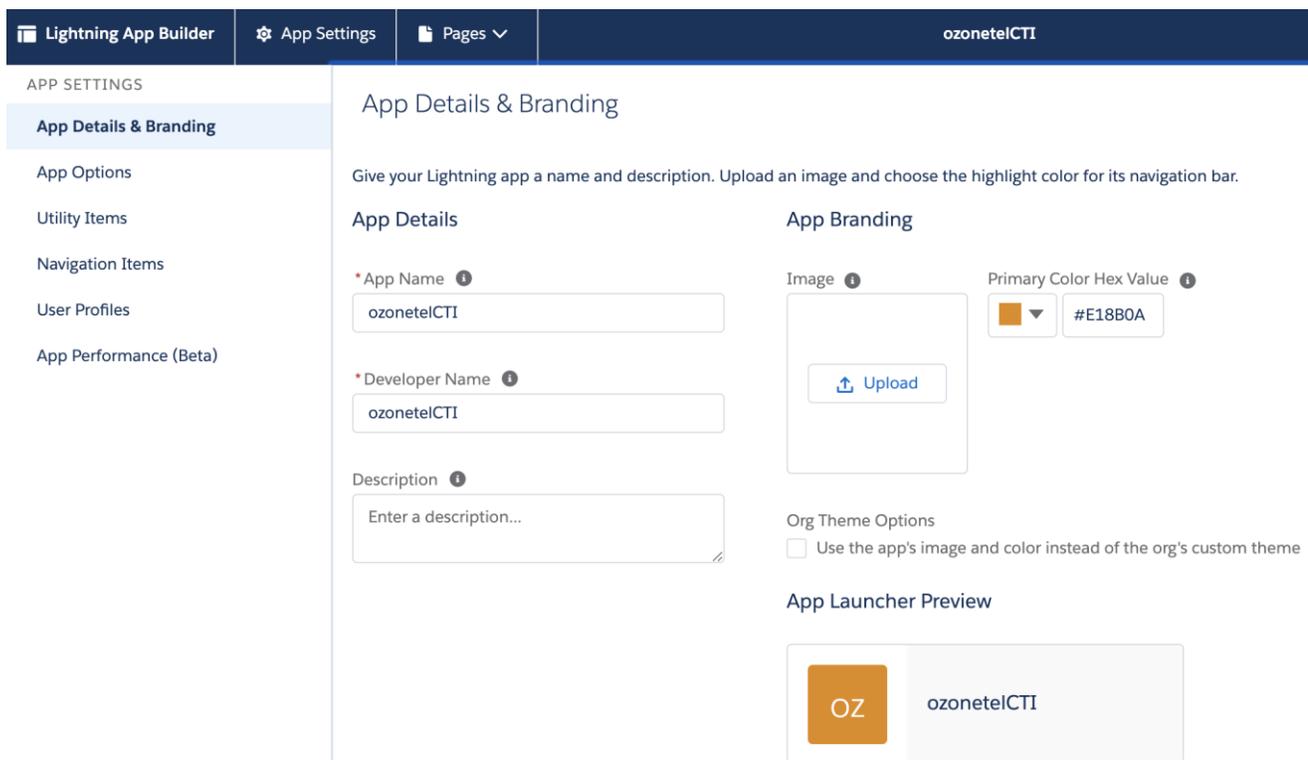
1. Assign Ozonetel Cloud Agent CTI for the respective app:



21 items • Sorted by App Name • Filtered by all appmenuitems - TabSet Type

APP NAME ↓	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED ...	APP ...	VI...
3 Service Console	LightningService	(Lightning Experience) Lets sup...	6/16/2018 8:47 PM	Lightning	✓
4 Service	Service	Manage customer service with ...	6/16/2018 8:47 PM	Classic	✓
5 Salesforce Chatter	Chatter	The Salesforce Chatter social n...	6/16/2018 8:47 PM	Classic	✓
6 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sal...	6/16/2018 8:47 PM	Lightning	✓
7 Sales	Sales	The world's most popular sales ...	6/16/2018 8:47 PM	Classic	✓
8 Sales	LightningSales	Manage your sales process wit...	10/23/2018 11:47 AM	Lightning	✓
9 Platform	Platform	The fundamental Lightning Pla...	6/16/2018 8:47 PM	Classic	✓
10 ozonetelCTI	ozonetelCTI		1/6/2019 7:18 PM	Lightning	✓
11 Monster.com	Monster_com_App	App/Org for Monster.com	6/17/2018 4:55 PM	Classic	✓

2. Give the Lightning app a name:



APP SETTINGS

- App Details & Branding
- App Options
- Utility Items
- Navigation Items
- User Profiles
- App Performance (Beta)

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

- * App Name: ozonetelCTI
- * Developer Name: ozonetelCTI
- Description: Enter a description...

App Branding

- Image: [Upload]
- Primary Color Hex Value: #E18B0A
- Org Theme Options:
 - Use the app's image and color instead of the org's custom theme

App Launcher Preview



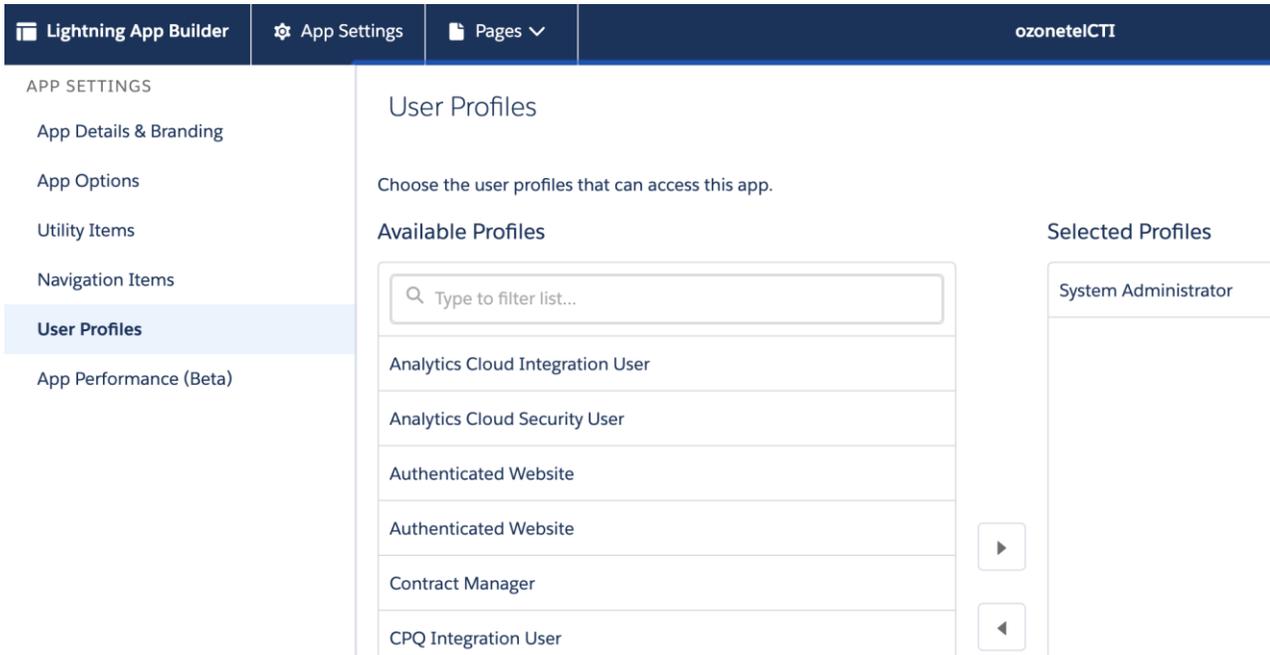
3. Add OpenCTI Phone to Lightning App:

The screenshot shows the Lightning App Builder interface for configuring a Lightning App. The left sidebar lists 'APP SETTINGS' with options: App Details & Branding, App Options, **Utility Items**, Navigation Items, User Profiles, and App Performance (Beta). The main area is titled 'Utility Items' and contains an 'Add Utility Item' button. A search modal is open, displaying a search bar and a list of items: Notes, Omni-Channel, **Open CTI Softphone** (highlighted with a red box), Quip, Quip Notifications, Recent Items, Report Chart, Rich Text, and Visualforce. Below the list is a 'Custom (0)' section. To the right, the 'PROPERTIES' panel for 'Open CTI Softphone' is visible, showing a 'Remove' button, 'Utility Item Properties', and fields for 'Label' (Phone), 'Icon' (call X), 'Panel Width' (340), and 'Panel Height' (480). At the bottom are 'Cancel' and 'Save' buttons.

4. Assign objects where you can access Ozonetel Cloud Agent CTI:

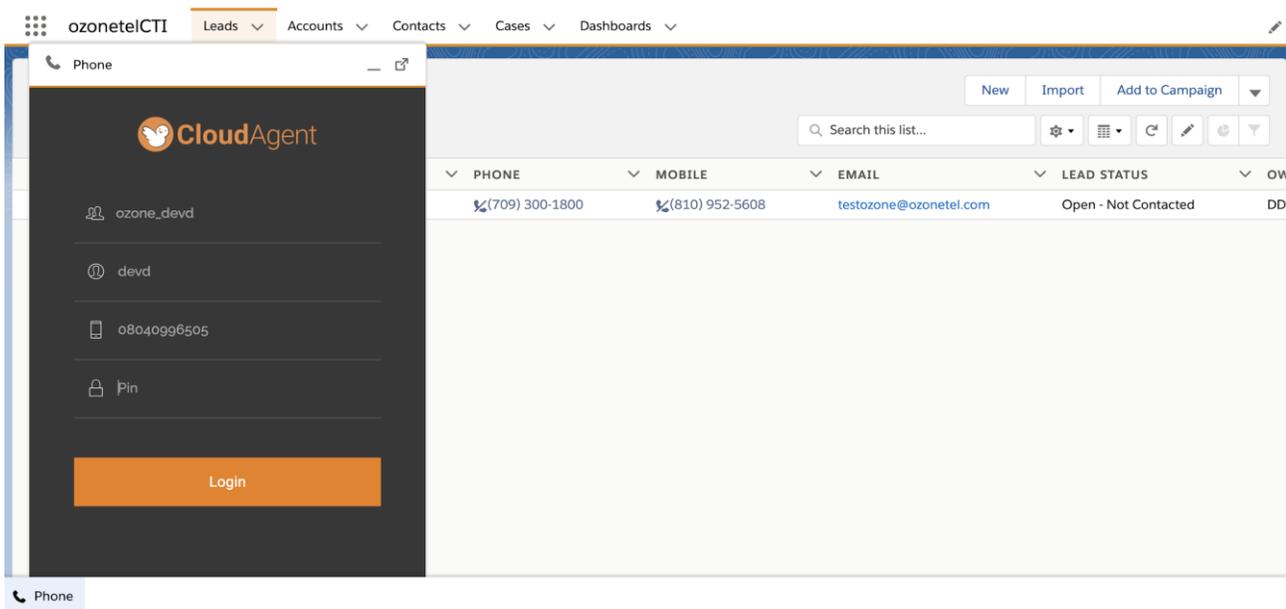
The screenshot shows the Lightning App Builder interface for configuring 'Navigation Items'. The left sidebar lists 'APP SETTINGS' with options: App Details & Branding, App Options, Utility Items, **Navigation Items**, User Profiles, and App Performance (Beta). The main area is titled 'Navigation Items' and contains the instruction: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation; rename the items that you add.' Below this is an 'Available Items' section with a search bar and a list of items: App Launcher, Approval Requests, Assets, and Authorization Form. To the right is a 'Selected Items' section with a list of items: Leads, Accounts, Contacts, and Cases. At the bottom right of the 'Available Items' list is a right-pointing arrow button.

5. Check user profile to access Ozonetel Cloud Agent CTI:



The screenshot shows the 'User Profiles' configuration page in the Lightning App Builder. The left sidebar lists 'APP SETTINGS' with 'User Profiles' selected. The main content area is titled 'User Profiles' and includes the instruction 'Choose the user profiles that can access this app.' Below this, there are two columns: 'Available Profiles' and 'Selected Profiles'. The 'Available Profiles' list includes: Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticated Website, Contract Manager, and CPQ Integration User. The 'Selected Profiles' list currently contains 'System Administrator'. Navigation arrows are visible between the two lists.

Ozonetel Cloud Agent CTI phone in the Lightning app:

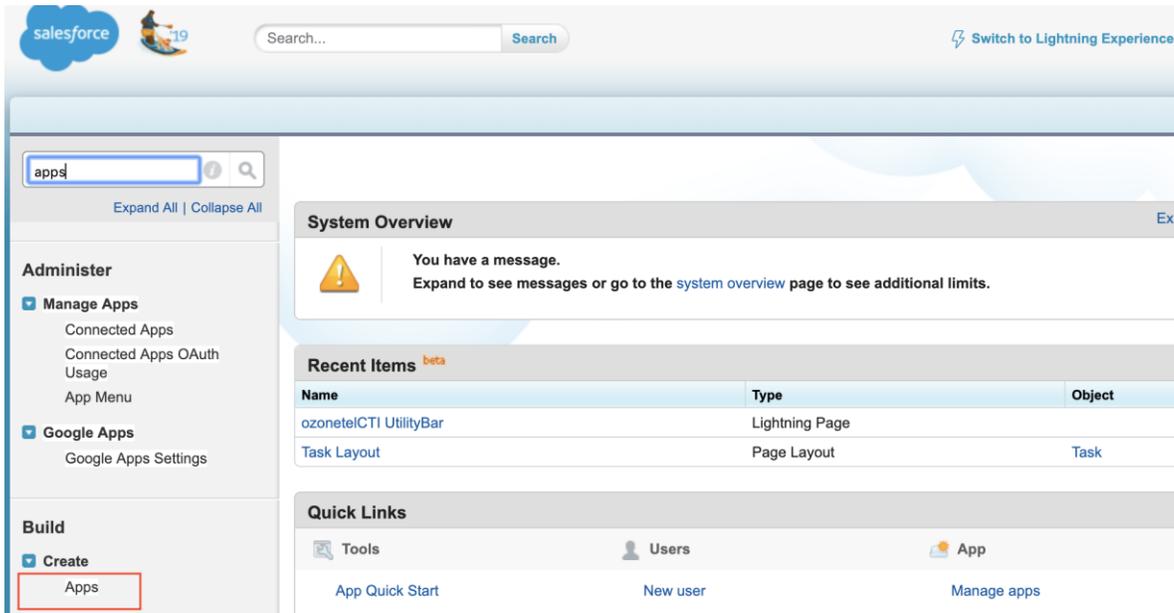


The screenshot displays the Ozonetel Lightning app interface. A 'Phone' window is open, showing a 'CloudAgent' login screen with fields for 'ozone_devd', 'devd', '08040996505', and 'Pin', along with a 'Login' button. In the background, a lead record is visible with the following details:

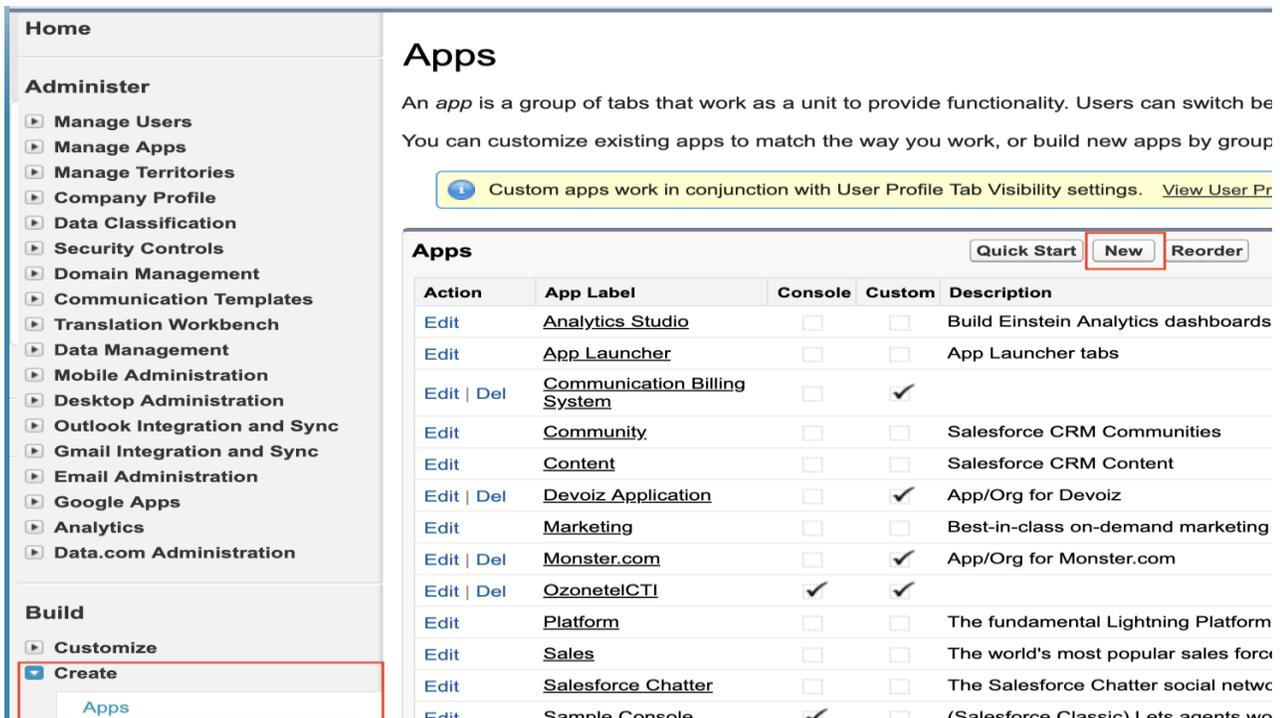
PHONE	MOBILE	EMAIL	LEAD STATUS	OW
(709) 300-1800	(810) 952-5608	testozone@ozonetel.com	Open - Not Contacted	DD

Configure Cloud Agent CTI Phone for Classic edition:

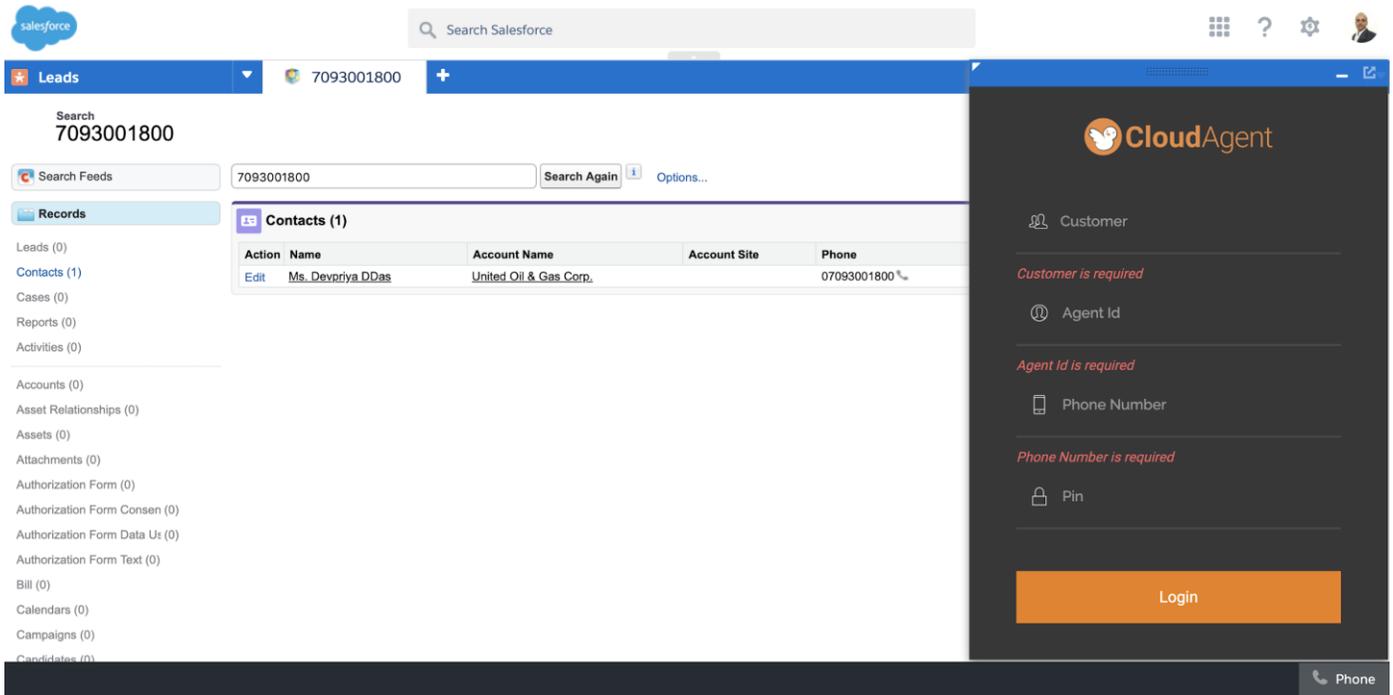
Step 1: Go to Classic Set up page: Go to Apps



Step 2: Create a New Console App: New Custom App > Select Console



Step 3: Once Step-2 is complete, Go to Console app & you will view Ozonetel CTI Phone at the right-hand bottom:



The screenshot shows the Salesforce console interface. At the top, there is a search bar with the text "Search Salesforce". Below it, a blue navigation bar displays "Leads" and the lead ID "7093001800". The main content area is divided into two sections: "Search Feeds" and "Records". The "Search Feeds" section shows a search for "7093001800" with a "Search Again" button. The "Records" section shows a table with one record:

Action	Name	Account Name	Account Site	Phone
Edit	Ms_Devpriya.DDas	United Oil & Gas Corp.		07093001800

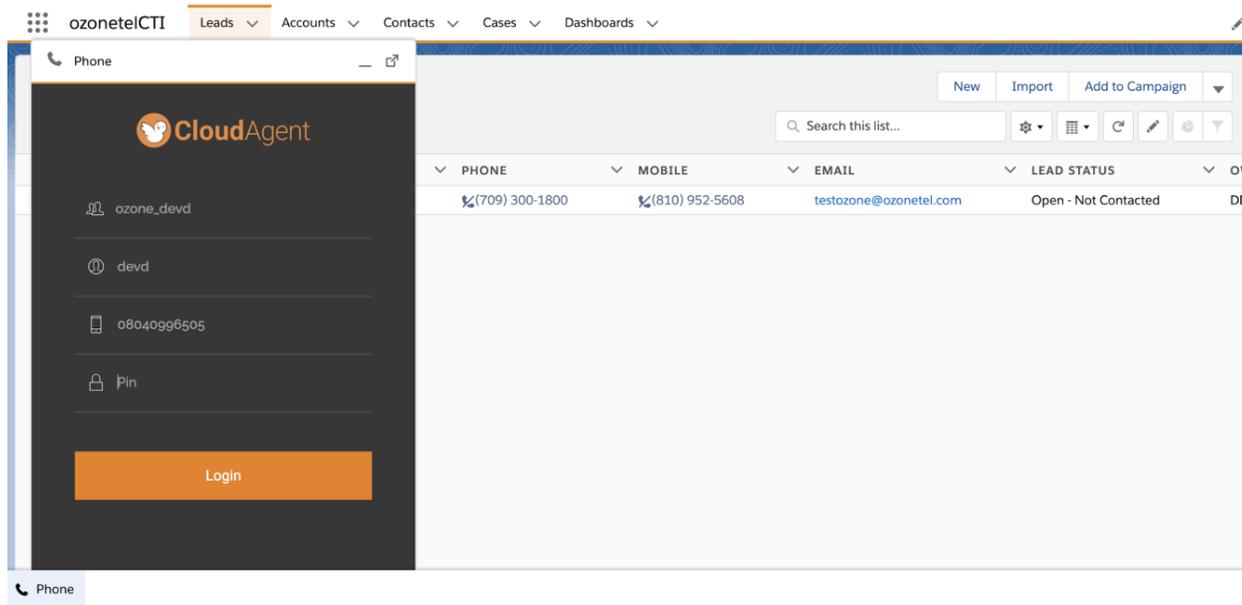
On the right side, a "CloudAgent" login overlay is visible. It contains the following fields and a "Login" button:

- Customer (required)
- Agent Id (required)
- Phone Number (required)
- Pin

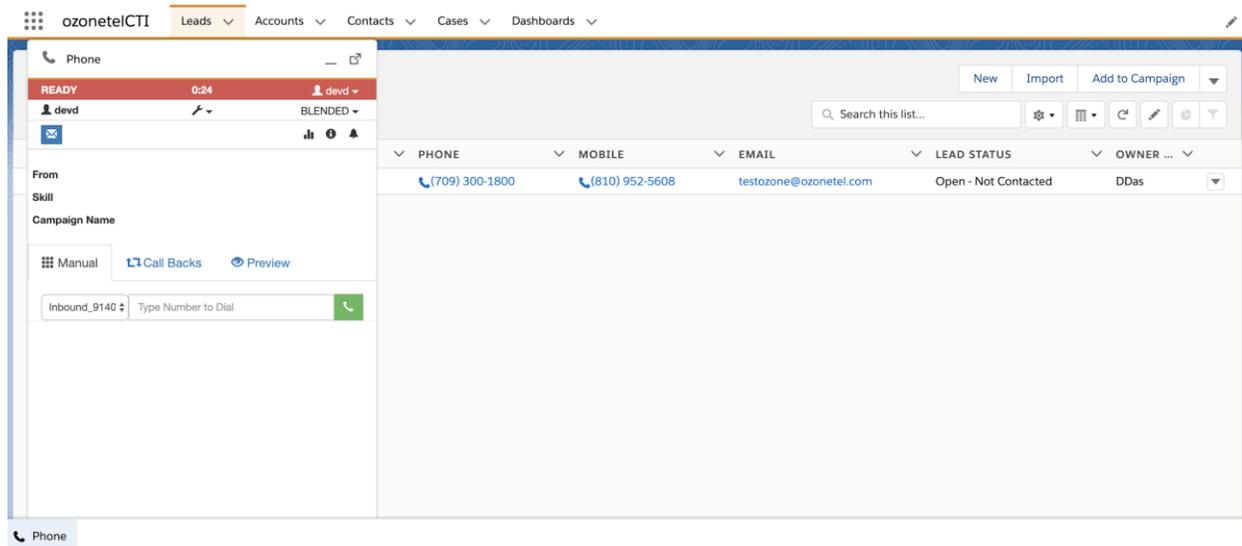
At the bottom right of the console, there is a "Phone" icon.

Test OpenCTI embedded in Salesforce:

1. Login in salesforce as an agent. Navigate to Application which is created as part of Install and Configure Demo Adapter as mentioned in the Salesforce document.
2. Click on the Phone button at the left bottom of the screen. Login to CloudAgent.



3. Once the agent is logged in, he/she can make herself READY & select CALL MODE (Inbound/Manual/Progressive/Blended).



Inbound: Only incoming call

Manual: Only Click To Call (manual outbound)

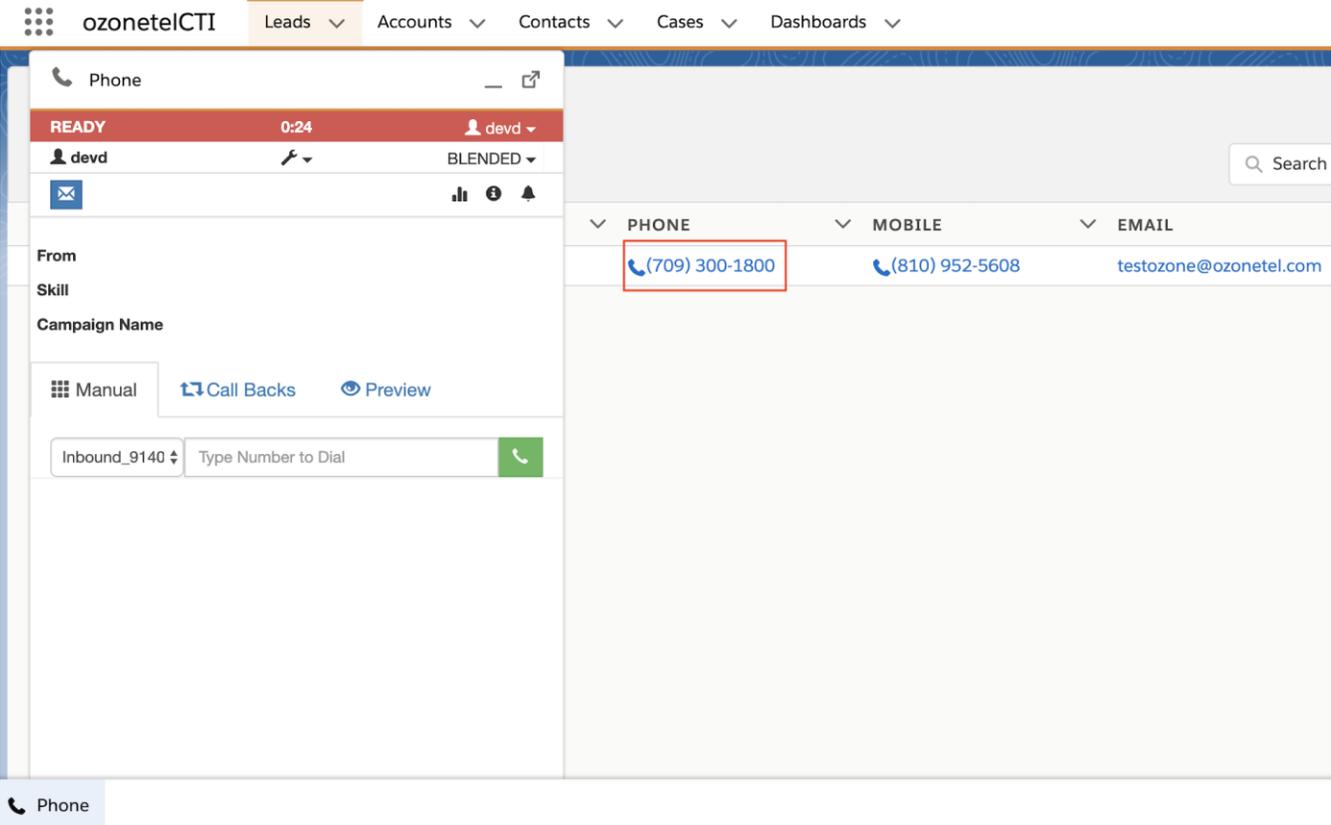
Progressive: Only automated dialer call

Blended: All of the above

Call Testing:

1. Click To Call:

Click on phone number under any object (Leads/Contacts/Accounts/Cases) for outbound call:



ozonetelCTI Leads Accounts Contacts Cases Dashboards

Phone

READY 0:24 devd

devd BLENDED

Search

PHONE	MOBILE	EMAIL
(709) 300-1800	(810) 952-5608	testozone@ozonetel.com

Manual Call Backs Preview

Inbound_9140 Type Number to Dial

Phone

Outbound Screen pop display (check the screen pop display options in Softphone layout):

Setup Home Object Manager

Q softphon

- Feature Settings
 - Service
 - Call Center
 - Softphone Layouts**

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

SETUP Softphone Layouts

Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layouts to user profiles by clicking Layout Assignment in the Softphone Layouts page.

Save Cancel

Name Cloud Agent Is Default Layout

Select Call Type Outbound

Softphone Layout Help about this section

Display these call-related fields:

- Caller ID, Dialed Number [Edit](#)

Display these salesforce.com objects:

- Account, Contact, Lead [Add / Remove Objects](#)

- If single Account found, display:** Account Name
If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed. [Edit](#)
- If single Contact found, display:** Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed. [Edit](#)
- If single Lead found, display:** Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed. [Edit](#)

Click to Call screen pop display:
The agent clicks on the desired object to work on

ozonetelCTI Leads Accounts Contacts Cases Dashboards

Phone

BUSY 0:20 devd

devd

From 07093001800
Skill 0
Campaign Name Inbound_914067337080

Manual Call Backs Preview

Inbound_9140 Type Number to Dial

COMPANY	PHONE	MOBILE	EMAIL	LEAD STATUS	OWNER ALIAS
Ozonetel	(709) 300-1800	(810) 952-5608	testozone@ozonetel.com	Open - Not Contacted	DDas

ACCOUNT NAME	ACCOUNT SITE	PHONE	EMAIL	CONTACT OWNER ALIAS
United Oil & Gas Corp.		07093001800	spavlova@uog.com	DDas

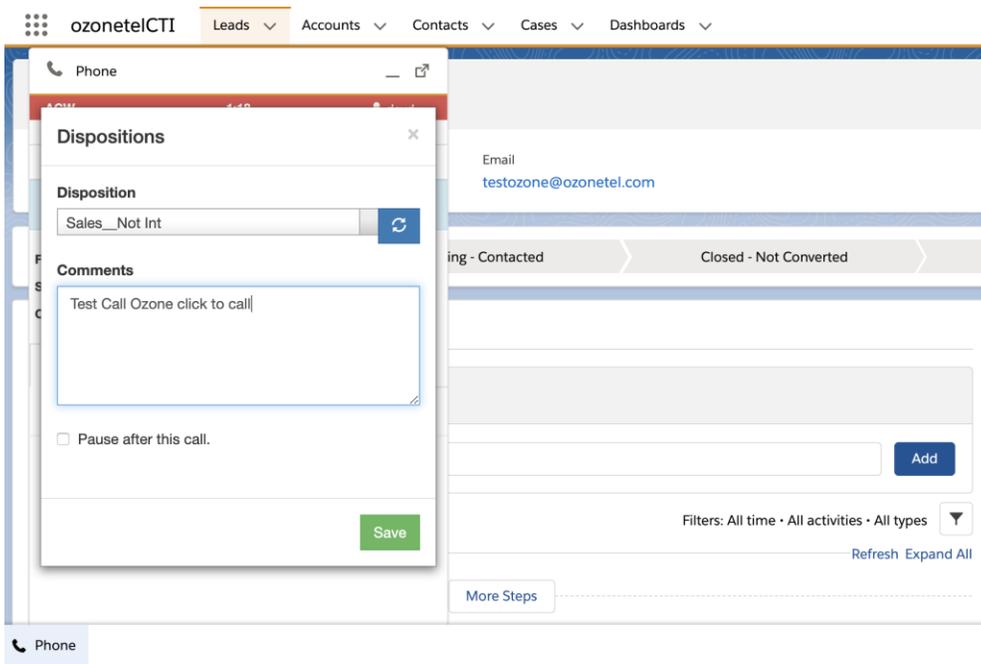
Don't see your result?

We searched the objects you use most, but we didn't search everything.
Know which object you're looking for? Select it in the dropdown next to the search box, or in the sidebar.

Phone

Upon the call is disconnected, the agent disposes of the call with Cloud Agent disposition.

Disposition can be done from Salesforce as well & Cloud Agent call disposition API needs to be integrated with Salesforce.



Cloud Agent CTI creates a task in Salesforce automatically (for the respective object page opened by the agent). Some fields are added in the below screenshot. More call parameters can be added on-demand:

ozoneteleCTI Leads Accounts Contacts Cases Dashboards * Manual Dialing - UCID -2... X

Details Related

Assigned To Dev Das	Related To
Subject Manual Dialing - UCID -2089156630103531	Call Type Outbound
Name Test Ozone	Call Duration 48
Status Not Started	callStatus Success
Priority Normal	campaignName Inbound_914067337080
Due Date	skillName 0
disposition Sales__Not Int	AudioFile http://recordings.kookoo.in/ozone_devd/ozone_devd_2089156630103531.mp3
dispositionDescription Test Call Ozone click to call	
Created By Dev Das , 8/20/2019 5:07 PM	Last Modified By Dev Das , 8/20/2019 5:09 PM
Comments 2089156630103531	

Phone

2. Inbound Call:

Inbound Screen pop display (check the screen pop display options in Softphone layout):

Setup Home Object Manager

Q softphon

- Feature Settings
 - Service
 - Call Center
 - Softphone Layouts**

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SETUP Softphone Layouts

Softphone Layout Edit

Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layouts to user per Softphone Layouts page.

Save Cancel

Name Is Default Layout

Select Call Type

Softphone Layout

Display these call-related fields:

- Caller ID, Dialed Number

Display these salesforce.com objects:

- Account, Contact, Lead, Monster.com Form, Opportunity, Task, Campaign, Customer, Case

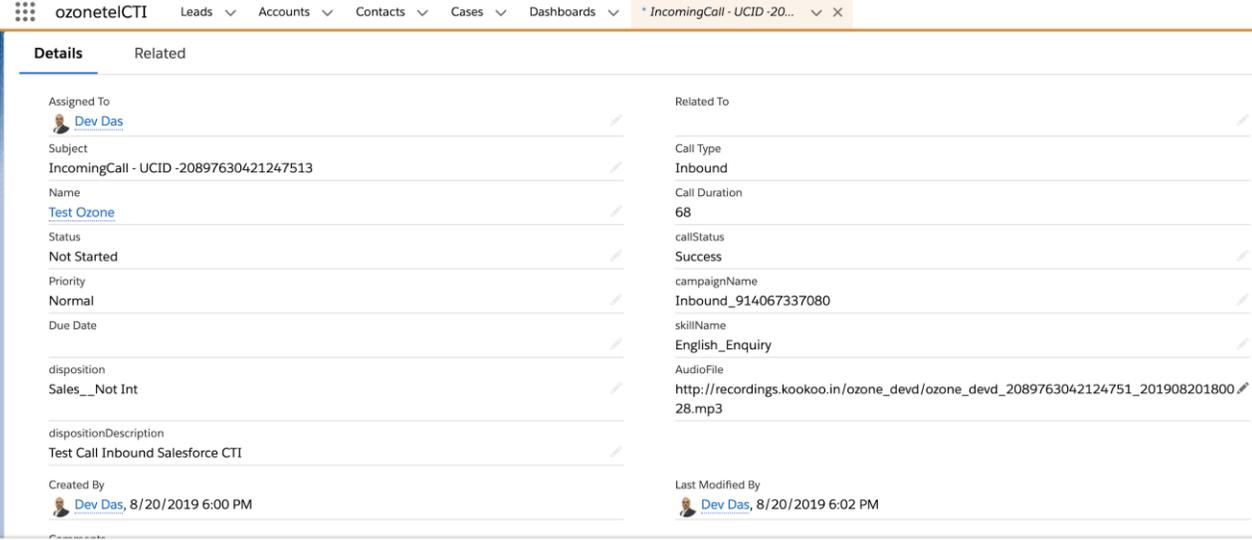
If single Account found, display: Account Name
If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

Inbound Call screen pop display:

Post the call is disconnected, agent disposes of the call with Cloud Agent disposition.

Disposition can be done from Salesforce as well & Cloud Agent call disposition API needs to be integrated with Salesforce. Ozonetel will share the call disposition API.

Cloud Agent CTI creates a task in Salesforce automatically (for the respective object page opened by the agent). Some fields are added in the below screenshot. More call parameters can be added on-demand:



3. Progressive Call (Auto/Power dialer):

In the case of Leads, calling leads is completely automated. No manual intervention is required. Ozonetel will share the API.

Once the lead lands in salesforce from various web sources, logic can be set in Salesforce to push the lead phone number to Cloud Agent progressive dialer campaign via Cloud Agent API & dialer dials out lead phone numbers automatically.

In the case lead/contact not available in salesforce, a blank lead/contact page can be opened. *(check the screen pop display options in Softphone layout)*

ozonetelCTI Leads

Phone

BUSY 0:18

devd

From: 8249251257

Skill: ozone_devd

Campaign Name: Progressive_918046107

Manual Call Backs

Inbound_9140 Type Number to Dial

New Lead

Lead Information

Lead Owner Dev Das	Phone <input type="text" value="8249251257"/>
* Name	Mobile <input type="text"/>
Salutation --None--	
First Name <input type="text"/>	
* Last Name <input type="text"/>	
* Company <input type="text"/>	Fax <input type="text"/>
Title <input type="text"/>	Email <input type="text"/>

Cloud Agent CTI creates a task in Salesforce automatically (for the respective object page opened by the agent).

ozonetelCTI Leads Accounts Contacts Cases Dashboards Progressive Dialing - UCI... Progressive Dialing - UCI...

Details Related

Assigned To
[Dev Das](#)

Subject
Progressive Dialing - UCID -9729156630614191

Name
[Dish D](#)

Status
Not Started

Priority
Normal

Due Date

disposition
General Enquiry

dispositionDescription
Progressive_Phone number not available in Salesforce. Blank screen pop

Created By
[Dev Das](#), 8/20/2019 6:32 PM

Comments
9729156630614191

Related To

Call Type
Outbound

Call Duration
75

callStatus
Success

campaignName
Progressive_918046107231

skillName
ozone_devd

AudioFile
http://recordings.kookoo.in/ozone_devd/ozone_devd_9729156630614191.mp3

Last Modified By
[Dev Das](#), 8/20/2019 6:34 PM

Phone

In the case single Lead/Contact/Account is available in salesforce, respective Lead/Contact/Account page can be opened. (check the screen pop display options in Softphone layout)

The screenshot shows the Salesforce interface with a 'Phone' softphone window. The softphone is in a 'BUSY' state with a duration of 0:15. Below the softphone, there is a call log showing two calls from 07093001800. The first call has a subject 'Generator GC3060 platform structure is w...' and the second has 'Electric surge damaging adjacent equipment'. To the right, the 'Activity' feed shows 'Next Steps' with two tasks: 'IncomingCall - UCID - ...' and 'Progressive Dialing - ...'. The top navigation bar includes 'ozonetelCTI', 'Leads', 'Accounts', 'Contacts', 'Cases', and 'Dashboards'.

Cloud Agent CTI creates a task in Salesforce automatically (for the respective object page opened by the agent).

The screenshot shows the 'Details' page for a task in Salesforce. The task is assigned to 'Dev Das' and has the subject 'Progressive Dialing - UCID - 9729156630627021'. The status is 'Not Started' and the priority is 'Normal'. The 'Related To' section shows it is linked to a 'Call Type' of 'Outbound' with a duration of 43 seconds. The 'AudioFile' is 'http://recordings.kookoo.in/ozone_devd/ozone_devd_9729156630627021.mp3'. The task was created by 'Dev Das' on 8/20/2019 at 6:34 PM and last modified by 'Dev Das' on 8/20/2019 at 6:35 PM. The top navigation bar includes 'ozonetelCTI', 'Leads', 'Accounts', 'Contacts', 'Cases', 'Dashboards', and a breadcrumb for 'Progressive Dialing - UCI...'. The bottom left shows a 'Phone' softphone icon.

Add more custom fields in Salesforce task layout:

The screenshot shows the CloudAgent interface. At the top left is the 'CloudAgent' logo. At the top right, the user name 'OZONE_' is displayed next to a dropdown arrow and a profile icon. The profile icon has a menu open with the following options: EDIT PROFILE, SETTINGS, ADMIN HELP, DASHBOARD HELP, and SIGN OUT.

In the center of the interface, there is a table titled 'SalesForce Task Fields'. The table contains the following data:

callerId	Phone
ucid	CallObject, Descrip
monitorUcid	
did	
campaignName	campaignName__c
skillName	skillName__c
uui	
callStatus	callStatus__c
agentId	
agentNumber	
callStartTime	CreatedDate
callEndTime	
duration	CallDurationInSeconds
disposition	disposition__c
dispositionDescription	dispositionDescription__c

An 'Edit' button is located to the right of the table.

Post addition & assign of new fields under task layout, you will be able to view those under task for all type of calls (Inbound, Click To Call, Progressive).