

Salesforce Aswat CTI Installation Guide

Installing the Aswat CTI for Salesforce App

The steps below will guide you on the initial installation of Aswat CTI for Salesforce app.

Step 1:

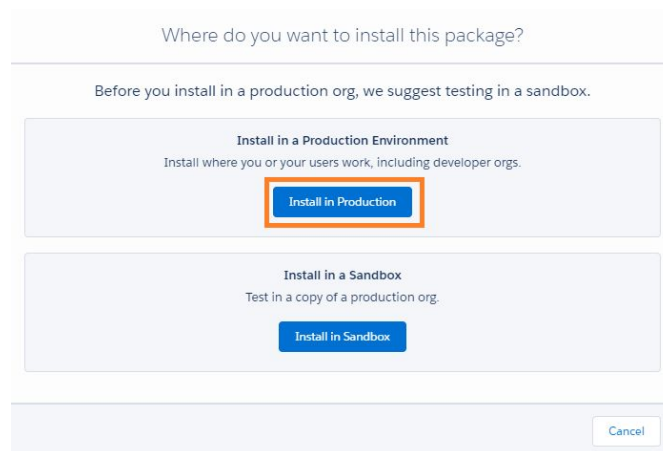
Login as an administrator to your Salesforce App Exchange.

Step 2:

Search for Aswat CTI and click download

Step 3:

After downloading, choose where you want to Install the App and Click Confirm and Install.



The screenshot shows a Salesforce installation dialog box titled "Where do you want to install this package?". Below the title, it says "Before you install in a production org, we suggest testing in a sandbox." There are two main options: "Install in a Production Environment" and "Install in a Sandbox". The "Install in a Production Environment" option is highlighted with an orange border and contains a blue button labeled "Install in Production". The "Install in a Sandbox" option contains a blue button labeled "Install in Sandbox". At the bottom right, there is a "Cancel" button.

Step 4:

Approve the Access Request and **Check** the Checkbox and Click **Continue**.

Confirm Installation Details

Here are the details we'll share from your profile

*First Name Martand *Company CloudRoute Edit Profile

*Last Name Atrey *Country India

*Job Title Intern State/Province

*Email

Phone

☐ I have read and agree to the [terms and conditions](#).

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

☐ Allow the provider to contact me by email, phone, or SMS about other products or services I might like

Cancel Confirm and Install

Step 5:

Select Install for All Users, then click Install.

☐ Install for Admins Only
 ☒ Install for All Users
 ☐ Install for Specific Profiles...

Install Cancel

Step 6:

After the Installation is complete click on Done.

i Installation Complete!

Done

Configuring the Call Centre:

In order to configure a call center, you need to have a ZIWO instance created.

If you don't have a ZIWO instance, you can Sign up for a ZIWO demo by clicking [here](#).

Make sure to remember your instance name as you are going to use it as the call center name in the below steps.

If you are already having a ZIWO platform then you can proceed with below steps.

Users will not have access to Aswat CTI for Salesforce unless the administrator adds them to the Call Center as detailed below.

Step 1:

Go to **Setup Home > Call Centers**.

Select the call center Aswat CTI App, then click Edit:

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'call centers' entered. The main content area is titled 'Call Centers' and shows a table of call centers. The table has columns: Action, Name, Version, Created Date, and Last Modified Date. The first row is 'Aswat CTI' with a red box around the 'Edit' button in the Action column.

Action	Name	Version	Created Date	Last Modified Date
Edit	Aswat CTI		2/18/2020, 9:53 PM	2/18/2020, 11:08 PM

Step 2:

Change the Call Centre Name to your ZIWO instance name (ZIWO instance name = Instance name **without** .aswat.co)

The screenshot shows the 'Call Center Edit' form for 'Aswat CTI'. The form has a 'General Information' section with the following fields:

- InternalName: AswatCTI
- Display Name: Aswat CTI
- CTI Adapter URL: /apex/ziwo__AswatCTI?sfd
- Use CTI API: true
- Softphone Height: 500
- Softphone Width: 330
- Call Center Name: ZIWO Instance name (highlighted with an orange box)
- Salesforce Compatibility Mode: Classic_and_Lightning
- Default Region Code: AE

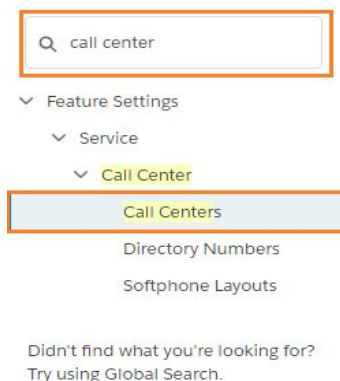
There are 'Save' and 'Cancel' buttons at the top right and bottom right of the form.

Adding Users to the Call Center

Users will not have access to Aswat CTI for Salesforce until the administrator adds them to the Call Center as detailed below.

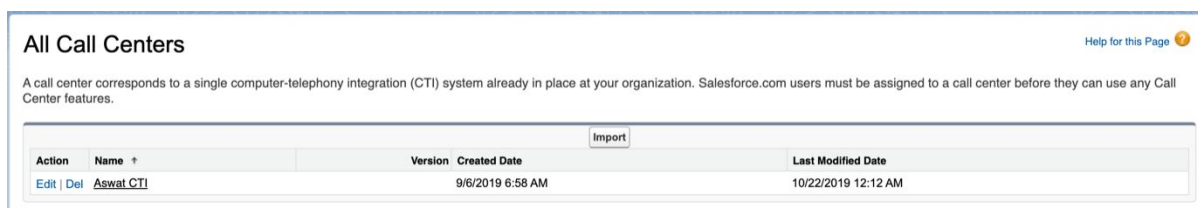
Step 1:

Go to Setup, search for **Call Centers** using Quick Find, then click **Call Centers**.



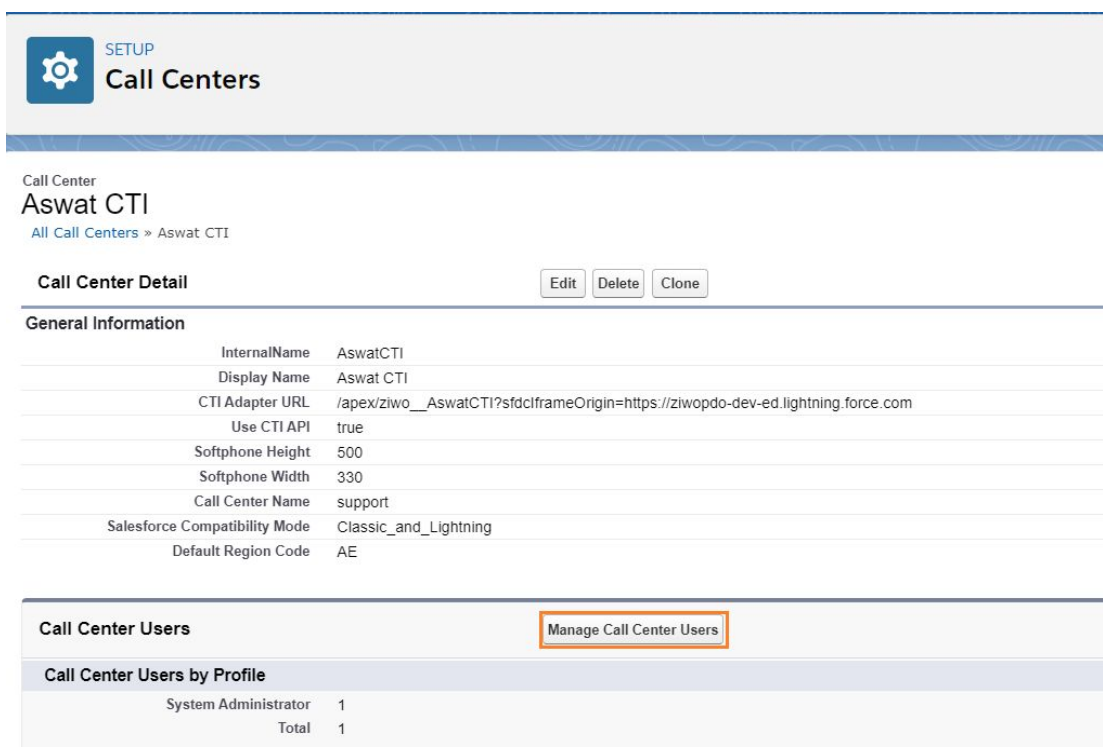
Step 2:

Click Aswat CTI.



Step 3:

Click Manage Call Center Users:



Step 4:

Click Add More Users.

NOTE: You cannot add Users that are already added to another call center.

Call Center
Aswat CTI: Manage Users
All Call Centers » Aswat CTI » 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 | V | W | X | Y | Z | Other All

Action	Full Name	Alias	Username	Role	Profile
☐ Remove	Khetan	Nkhet	eric.ouisse@ziwo.io.apptesting		System Administrator

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

Step 5:

Select Filters, then click Find.

--None-- --None-- AND
--None-- --None-- AND
--None-- --None-- AND
--None-- --None-- AND
--None-- --None-- AND

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 8/29/2018
- For date/time fields, enter the value in following format: 8/29/2018 6:40 AM

Find

Step 6:

Select a User, then click Add to Call Center.

	Full Name	Alias	Username	Role	Profile
☒	Atrey_Martand	MAtre	martandatreya@salesforce.com	Chief Sales Officer	System Administrator

Setting up Softphone Layouts in Salesforce

Configuring the SoftPhone Layouts involves the following steps to enable specific feature behaviours:

- 1) Setting up a SoftPhone Layout
- 2) Assigning the SoftPhone Layout to Users

Setting up a Softphone Layout

Step 1:

From the left-hand side menu, under Setup, use Quick Find to search for **SoftPhone Layouts**, and then click on **SoftPhone Layouts**.

Step 2:

Click New.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'soft' entered and a list of categories: Feature Settings, Service, Call Center, and Softphone Layouts (highlighted with a red box). The main content area is titled 'Softphone Layouts' and includes a description: 'A softphone is a customizable call control tool that appears in the sidebar of every salesforce.com page if a user is assigned to a call center and is working on a machine on which a CTI adapter has been installed. Similar to page layouts, you can design custom softphone layouts and assign them to call center users based on their user profile.' Below the description is a table with columns: Action, Name, Default, Created By Alias, Created Date, Last Modified By Alias, and Last Modified Date. A 'New' button is highlighted with a red box. The table contains one row for 'Aswat SoftPhone Layout' with a checked 'Default' checkbox and 'NKhet' as the created and last modified by.

Action	Name	Default	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
Edit	Aswat SoftPhone Layout	☒	NKhet	2/18/2020, 10:28 PM	NKhet	2/18/2020, 10:28 PM

Step 3:

In the Name field, type Aswat SoftPhone Layout, then select the Is Default Layout checkbox to make it the default layout for all Users.

The screenshot shows the 'New Softphone Layout' form. It has a 'Name' field with 'Aswat Softphone Layout' entered and a checked 'Is Default Layout' checkbox. At the bottom, there is a 'Select Call Type' dropdown menu with 'Inbound' selected.

Name: ☒ Is Default Layout

Select Call Type:

Step 4:

Configure the page exactly as below for **INBOUND**:



Search Setup



Setup Home Object Manager

call

Feature Settings

Service

Call Center

Call Centers

Directory Numbers

Softphone Layouts

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

Softphone Layouts

Softphone Layout Edit

Help for this Page

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 Aswat Softphone Lay ✓ Is Default Layout

Select Call Type Inbound

Softphone Layout

Help about this section

Display these call-related fields:

Caller ID, Dialed Number

Edit

Display these Salesforce.com objects:

Account, Contact, Lead

Collapse

Available		Selections
Campaign		Account
Case		Contact
Event		Lead
Opportunity		
Task	Add	Up
User	Remove	Down

If single Account found, display: Account Name, Phone

Collapse

Available		Selections
Type		Account Name
Billing Street		Phone
Billing City		
Billing State/Province		
Billing Zip/Postal Code		
Billing Country		
Billing Latitude		
Billing Longitude		
Billing Geocode Accuracy		
Shipping Street		
Shipping City		
Shipping State/Province		
Shipping Zip/Postal Code		
Shipping Country		

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

If single Contact found, display: Name, Title, Phone, Mobile, Home Phone, Other Phone, Asst. Phone, Email

Collapse

Available		Selections
Salutation		Name
First Name		Title
Last Name		Phone
Other Street		Mobile
Other City		Home Phone
Other State/Province		Other Phone
Other Zip/Postal Code		Asst. Phone
Other Country		Email
Other Latitude		
Other Longitude		
Other Geocode Accuracy		
Mailing Street		
Mailing City		
Mailing State/Province		

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

If single Lead found, display: Name, Title, Phone, Mobile, Fax, Email

Collapse

Available		Selections
Salutation		Name
First Name		Title
Last Name		Phone
Company		Mobile
Street		Fax
City		Email
State/Province		
Zip/Postal Code		
Country		
Latitude		
Longitude		
Geocode Accuracy		
Website		
Description		

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

Screen Pop Settings

Help about this section

Screen pops open within: Existing browser window

Collapse

☒ Existing browser window
☐ New browser window or tab

No matching records: Pop to new Lead

Collapse

☐ Don't pop any screen
☒ Pop to new Lead
☐ Pop to Visualforce page
☐ Pop to flow --None--

Single-matching record: Pop detail page

Collapse

☐ Don't pop any screen
☒ Pop detail page
☐ Pop to Visualforce page
☐ Pop to flow --None--

Multiple-matching records: Pop to search page

Collapse

☐ Don't pop any screen
☒ Pop to search page
☐ Pop to Visualforce page
☐ Pop to flow --None--

Step 5:

Configure the page exactly as below for **OUTBOUND**:

SETUP Softphone Layouts

Select Call Type: Outbound

Softphone Layout

Display these call-related fields:

- Caller ID, Dialed Number

Display these salesforce.com objects:

- Contact, Lead

If single Contact found, display: Name, Mobile, Home Phone, Other Phone, Asst. Phone, Email, Title

Available: First Name, Last Name, Other Street, Other City, Other State/Province, Other Zip/Postal Code, Other Country, Other Latitude, Other Longitude, Other Geocode Accuracy, Mailing Street, Mailing City, Mailing State/Province, Mailing Zip/Postal Code

Selections: Name, Mobile, Home Phone, Other Phone, Asst. Phone, Email, Title

If single Lead found, display: Name, Title, Phone, Mobile, Fax, Email

Available: Salutation, First Name, Last Name, Company, Street, City, State/Province, Zip/Postal Code, Country, Latitude

Selections: Name, Title, Phone, Mobile, Fax, Email

Step 5:

Click Save

Assigning the SoftPhone Layout to Users

Click SoftPhone Layout Assignment to assign the newly created layout to relevant profiles.

Softphone Layouts

[Help for this Page](#)

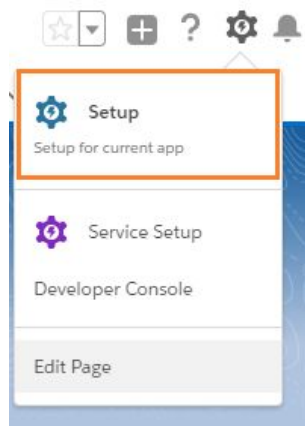
A softphone is a customizable call control tool that appears in the sidebar of every salesforce.com page if a user is assigned to a call center and is working on a machine on which a CTI adapter has been installed. Similar to page layouts, you can design custom softphone layouts and assign them to call center users based on their user profile.

Action		Name	Default	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
Edit		Aswat Softphone Layout	✓	NKhet	9/7/2019 9:19 AM	NKhet	9/7/2019 9:26 AM

Add Open CTI SoftPhone to your Lightning App

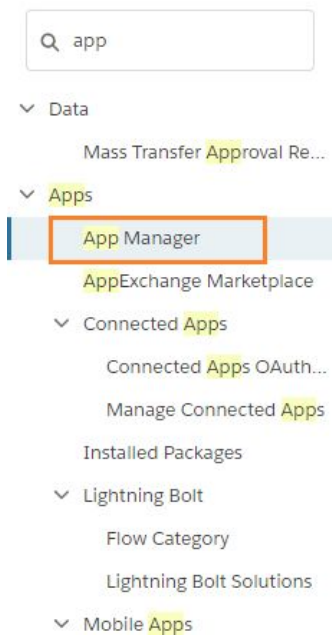
Step 1:

You can add CTI to any of your Lightning apps. Click the Gear icon User-added image, and then go to Setup.



Step 2:

You can use the Quick Find field to search for App Manager or you can go to Platform Tools > Apps > App Manager.



Step 3:

Click the drop-down arrow on the Lightning app to be added to the Aswat app, then click Edit. For this example, we will add the Open CTI Softphone to the Sales app.

Q app man

Apps

App Manager

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

SETUP Lightning Experience App Manager

New Lightning App New Connected App

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

	App Name ↑	Developer Name	Description	Last Modified Da...	App...	Vi...
1	App Launcher	AppLauncher	App Launcher tabs	2/16/2020, 11:29 P...	Classic	✓
2	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	2/16/2020, 11:29 P...	Lightning	✓
3	Community	Community	Salesforce CRM Communities	2/16/2020, 11:29 P...	Classic	✓
4	Consumer Goods	Retail	Manage your retail inventory, promotions, planograms and other instore activities	2/16/2020, 11:29 P...	Lightning	✓
5	Content	Content	Salesforce CRM Content	2/16/2020, 11:29 P...	Classic	✓
6	Force.com	Force_com	Start Here	2/16/2020, 11:29 P...	Classic	✓
7	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	2/16/2020, 11:29 P...	Lightning	✓
8	Marketing	Marketing	Best-in-class on-demand marketing automation	2/16/2020, 11:29 P...	Classic	✓
9	Platform	Platform	The fundamental Lightning Platform	2/16/2020, 11:29 P...	Classic	✓
10	Sales	Sales	The world's most popular sales force automation (SFA) solution	2/16/2020, 11:29 P...	Classic	✓
11	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	2/18/2020, 10:32 P...	Lightning	✓
12	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	2/16/2020, 11:29 P...	Lightning	Edit
13	Salesforce CMS	SalesforceCMS	Manage content and media for all of your sites.	2/16/2020, 11:29 P...	Lightning	✓
14	Service	Service	Manage customer service with accounts, contacts, cases, and more	2/16/2020, 11:29 P...	Classic	✓
15	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service channels on one scr...	2/16/2020, 11:29 P...	Lightning	✓

Step 4:

Open the Utility Bar tab, then click Add.

APP SETTINGS

App Details & Branding

App Options

Utility Bar

Select Items

Assign to User Profiles

App Performance (BETA)

Utility Bar

Give your users quick access to common productivity tools.

Utility Bar Items Add

To enable the utility bar for this app, add a utility item.

Step 5:

Click Open CTI Softphone from the list.

APP SETTINGS

App Details & Branding

App Options

Utility Bar

Select Items

Assign to User Profiles

App Performance (BETA)

Utility Bar

Give your users quick access to common productivity tools.

Utility Bar Items Add

Search...

Standard (13)

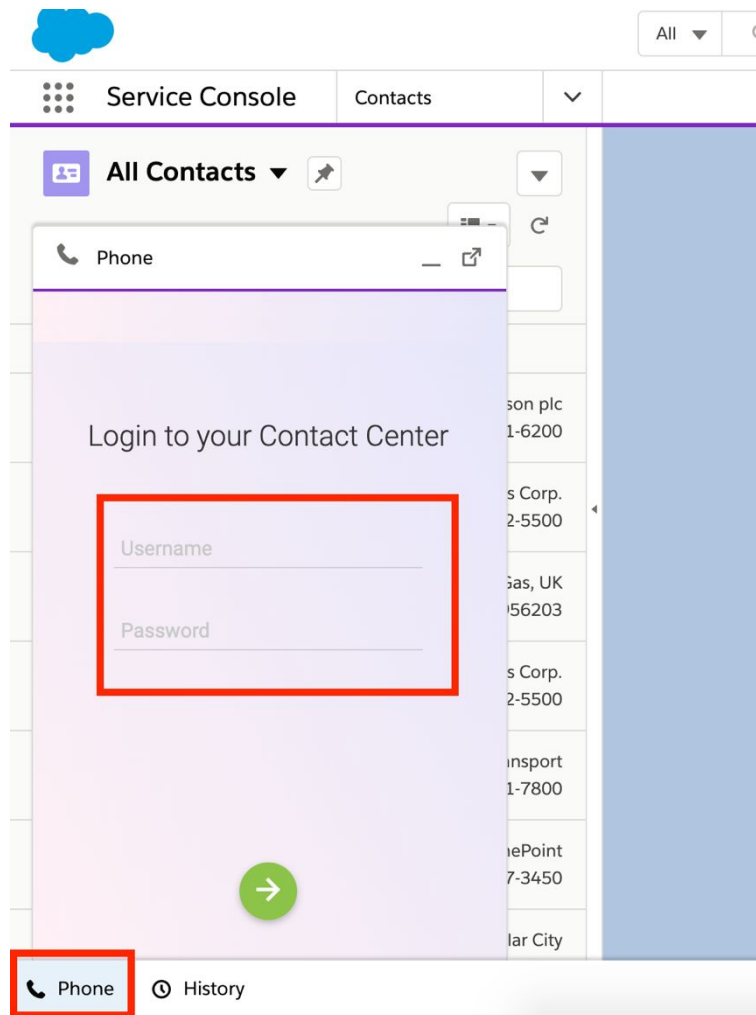
- Chatter Feed
- Chatter Publisher
- Flow
- History
- List View
- Macros
- Notes
- Open CTI Softphone
- Quip
- Recent Items

To enable the utility bar for this app, add a utility item.

Step 6:

Click Save, and then click Done.

In the previous example, we added the Open CTI Softphone to the Sales app. Launch the Sales app from the App Launcher. ZIWO Softphone will be displayed in the Utility Bar.



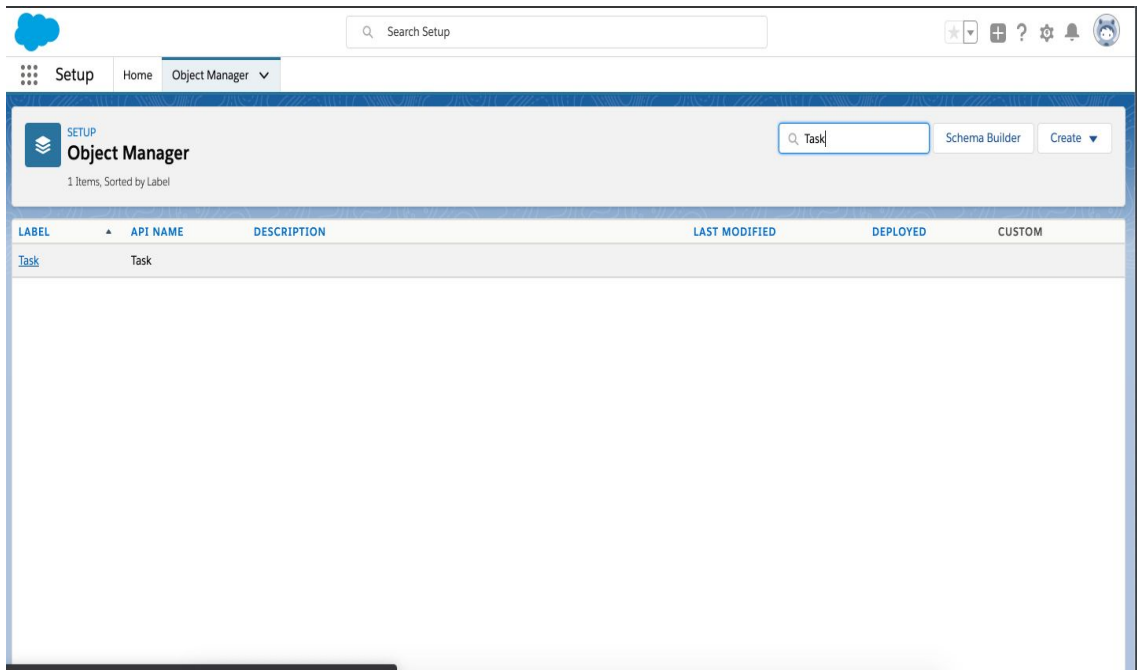
Add Aswat fields on the task layout

You can either take route 1 or 2 depending on the requirement. If a customer has already customized his task view then take route 1. If a customer has not customized a view and wants to use our layout then take route 2.

Route 1

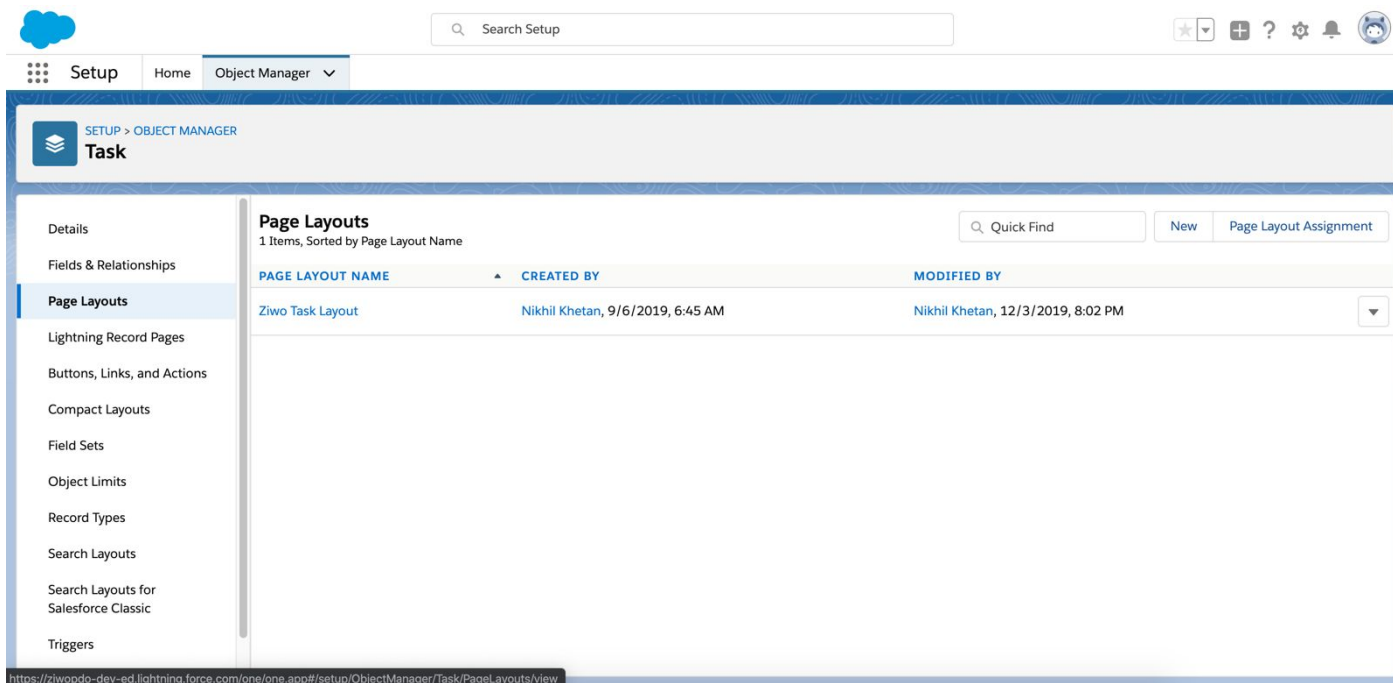
Step 1:

Go to Setup > Object Manager > Task



Step 2:

Go to page layouts. You might see more than 1 layout here. Layout named as “Ziwo Task Layout” is something we give as a default, but if you want to configure your own layout, then open the one which you want to configure.



Step 3:

Drag and drop the field as per below from the the fields section and visualforce for listening call recording from visualforce section. And finally save it.

Fields

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists

Layout Properties

Field Name	Field Name	Field Name	Field Name	Field Name	Field Name	Field Name	Field Name	Field Name	Field Name
Call Duration	Call ID	Call Score	Call Start Date/Time	Create Recurring ...	Last Modified By	Recurrence Interval	Status		
CallDurationInSec...	Call Object Ident...	Call Start Date/Time	Create Recurring ...	Name	Related To	Subject			
Assigned To	Call End Date/Time	Call Recording URL	Call Type	Due Date	Phone	Reminder Set	Task Subtype		
Call Cause	Call Hangup By	Call Result	Comments	Email	Priority	Repeat This Task	Type		

Call Details

AswatTaskRecordingPlayer

Blank Space

Call Cause Sample Text

Call Object Identifier Sample Text

Call Recording URL www.salesforce.com

Call Result Sample Text

Call Score Sample Text

Call Hangup By Sample Text

Call Type Sample Text

Call Start Date/Time 1/23/2020 12:41 AM

Call End Date/Time 1/23/2020 12:41 AM

CallDurationInSeconds 93

Call Duration 80,227

Description Information

Comments Sample Text

System Information

Route 2

Step 1:

Go to Setup > Object Manager > Task

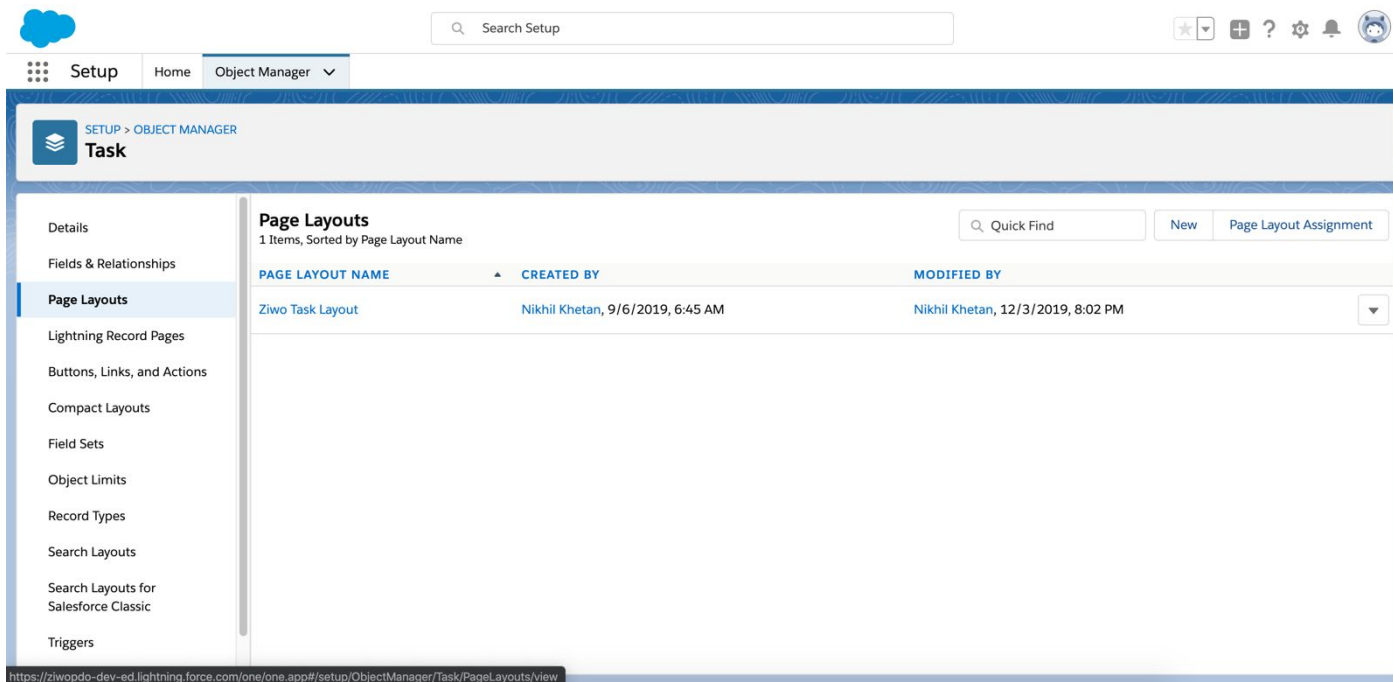
Object Manager

1 Items, Sorted by Label

LABEL	API NAME	DESCRIPTION	LAST MODIFIED	DEPLOYED	CUSTOM
Task	Task				

Step 2:

Go to page layouts. You might see more than 1 layout here. Layout named as “Ziwo Task Layout” is something we give as a default, but if you want to configure your own layout, then open the one which you want to configure.

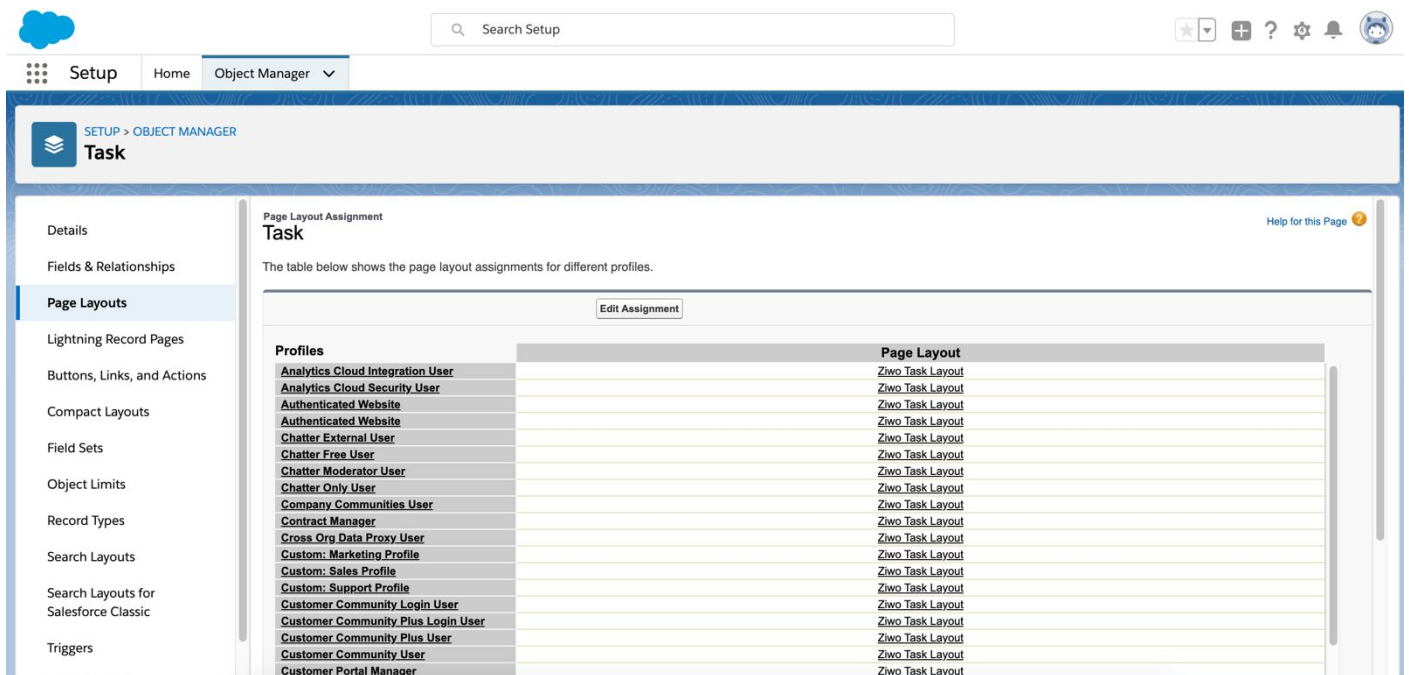


The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options, with 'Page Layouts' selected under the 'Task' object. The main content area displays 'Page Layouts' for the 'Task' object, showing 1 item sorted by Page Layout Name. The table lists the 'Ziwo Task Layout' created by Nikhil Khetan on 9/6/2019 at 6:45 AM, last modified by Nikhil Khetan on 12/3/2019 at 8:02 PM. A 'Quick Find' search bar and buttons for 'New' and 'Page Layout Assignment' are visible at the top right.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Ziwo Task Layout	Nikhil Khetan, 9/6/2019, 6:45 AM	Nikhil Khetan, 12/3/2019, 8:02 PM

Step 3:

Click on Page layout assignment button on the right top corner. You will see the following screen. In this screen, you can adjust which profile should see which layout. This way you can control which user see which data.



The screenshot shows the 'Page Layout Assignment' screen for the 'Task' object. The left sidebar is the same as the previous screenshot. The main content area shows a table of page layout assignments for different profiles. The table has two columns: 'Profiles' and 'Page Layout'. All profiles listed are assigned the 'Ziwo Task Layout'. An 'Edit Assignment' button is located above the table. A 'Help for this Page' link is in the top right corner.

Profiles	Page Layout
Analytics Cloud Integration User	Ziwo Task Layout
Analytics Cloud Security User	Ziwo Task Layout
Authenticated Website	Ziwo Task Layout
Authenticated Website	Ziwo Task Layout
Chatter External User	Ziwo Task Layout
Chatter Free User	Ziwo Task Layout
Chatter Moderator User	Ziwo Task Layout
Chatter Only User	Ziwo Task Layout
Company Communities User	Ziwo Task Layout
Contract Manager	Ziwo Task Layout
Cross Org Data Proxy User	Ziwo Task Layout
Custom: Marketing Profile	Ziwo Task Layout
Custom: Sales Profile	Ziwo Task Layout
Custom: Support Profile	Ziwo Task Layout
Customer Community Login User	Ziwo Task Layout
Customer Community Plus Login User	Ziwo Task Layout
Customer Community Plus User	Ziwo Task Layout
Customer Community User	Ziwo Task Layout
Customer Portal Manager	Ziwo Task Layout

Step 4:

Click on Edit Assignment, select all the profiles who you want to set the default task layout from Ziwo and save it.

Setup | Home | Object Manager | Task

Task

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Search Layouts

Search Layouts for Salesforce Classic

Triggers

Edit Page Layout Assignment

Task

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Save Cancel

Page Layout To Use ✓ -- Select Page Layout -- 41 Selected 0 Changed

Ziwo Task Layout

Profiles	Page Layout
Analytics Cloud Integration User	Ziwo Task Layout
Analytics Cloud Security User	Ziwo Task Layout
Authenticated Website	Ziwo Task Layout
Authenticated Website	Ziwo Task Layout
Chatter External User	Ziwo Task Layout
Chatter Free User	Ziwo Task Layout
Chatter Moderator User	Ziwo Task Layout
Chatter Only User	Ziwo Task Layout
Company Communities User	Ziwo Task Layout
Contract Manager	Ziwo Task Layout
Cross Org Data Proxy User	Ziwo Task Layout
Custom: Marketing Profile	Ziwo Task Layout
Custom: Sales Profile	Ziwo Task Layout
Custom: Support Profile	Ziwo Task Layout
Customer Community Login User	Ziwo Task Layout
Customer Community Plus Login User	Ziwo Task Layout

Assign Permission Set to Users

Now, as Aswat is the third party application, we need to give access to users who want to use our app. Salesforce Permission set is something which we will use to assign it to the specific users/agents.

Step 1: Go to Setup >> Find Permission in Quick Find >> Open “Ziwo Agent Permission Set”

Step 2: Go to Manage Assignment and click on Add Assignment Button

The screenshot shows the Salesforce Setup interface for the 'Ziwo Agent Permission Set'. The left sidebar contains a search bar with 'permis' and a list of navigation items: Users, Permission Sets (highlighted), Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and shows the 'Ziwo Agent Permission Set' overview. A red box highlights the 'Manage Assignments' button in the top right corner of the overview section. Below the overview, there is a table with columns for Description, License, Session Activation Required, Last Modified By, API Name, Namespace Prefix, and Created By. The 'Apps' section lists various settings like Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, and Visualforce Page Access.

Setup

Home Object Manager

Search Setup

permis

Users

Permission Sets

Custom Code

Custom Permissions

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

Permission Set

Ziwo Agent Permission Set

Find Settings... Clone Edit Properties **Manage Assignments**

Permission Set Overview

Description	API Name
License	Ziwo_Agent_Pei
Session Activation Required	Namespace Prefix
Last Modified By	Created By

Settings that apply to Salesforce apps, such as Sales, and

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages

Setup

Permission Sets

Assigned Users

Ziwo Agent Permission Set

« Back to: Permission Set

Add Assignments Remove Assignments

Action	Full Name	Alias
Edit	Khetan	NKhet

Add Assignments Remove Assignments

Step 3: Search for the desired users you want to give access to and then finally click on Assign and Done.

 **SETUP**
Permission Sets

Assign Users

Admin Users

View: Admin Users Edit Create New View

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

Assign Cancel

☐	Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile
☒	Edit	Khetan	NKhet		4/24/2020, 2:07 AM		☒	System Administrator

Assign Cancel