

COMMUNITY

salesforce

Salesforce CTI Integration

PRODUCT GUIDE

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Table of Contents

Installation & Configuration	2
Getting Started	2
Installation	2
Set Up.....	3
Confirming Configuration.....	5
Uninstallation	6
myHUD User Installation and Configuration	6
User Guide	7
Introduction	7
Placing / Receiving Calls.....	8
Transferring Calls	8
Logging a Call Task	9
Call Log Reports	9
Appendix: Adapter Limitations and Troubleshooting	10
Known Limitations	10
Troubleshooting.....	10

Installation & Configuration

Getting Started

- To get setup, you'll need a Salesforce account: Enterprise, Performance, Unlimited, Developer, or Database.com Editions.
- A Salesforce Admin is required to install the NetFortris adapter, add call center users and make the necessary configurations. Set up time is approximately 10-20 mins.

Installation

- To install the NetFortris Comm-unityY Salesforce Adapter, an admin will need to download the application from the "Salesforce AppExchange" at <https://appexchange.salesforce.com/>.
- Search for **NetFortris Comm-unity for Salesforce** and click the "Get it Now" button.

Set Up

Once installed, you'll need to update the CTI Adapter URL and add users to the NetFortris Call Center.

1. Log into Salesforce.
2. Go to **Setup** in the upper right corner (gear icon).
3. Search for **Call Centers** in the search box on the left (If you see only **Call Center** [singular] with a right-facing arrow next to it, click it to reveal **Call Centers** [plural] and click that).
4. If you see a **Continue** button, click it to reveal the list of call center configurations.
5. Click on **NetFortris Call Center**.
6. Click **Edit** and replace the CTI Adapter URL with <https://sfa.netfortris.com/>.
7. Click **Save**.
8. Next, click **Manage Call Center Users** at the bottom.
9. Click **Add More Users**.
10. Search for and add users who want to use the CTI Adapter (You can usually just click **Find** here without filling out any of the filter fields to find your user).

Note: A user must be added as a Call Center User in order to have access to the NetFortris integration.

When done adding users to the Call Center environment, you will need to make some additional configuration changes. These changes set up default Call Logging, Call Disposition settings, etc.

1. Go to **Setup** as above.
2. Search for **Custom Settings** in the search box and click on it.
3. Click **NetFortris CTI Settings**.
4. Click **Manage** at the top.
5. Click **New** above the "Default Organization Level Value" line.
6. Click **Save** without making any changes.
7. Search for **Softphone Layouts** in the search box and click on it.
8. Click **Continue**.
9. Click **New**.
10. Enter a name in the Name box (e.g. "NetFortris Softphone Layout").
11. Check Is **Default Layout**.
12. Click **Save**.

Confirming Configuration

- Once completed, click the App Launcher icon in the upper left (it's a square of 9 dots). Click on **NetFortris CTI Adapter**. You might need to click **View All** to see it.
- You should now be able to see a Phone tab in the lower left corner on the main Salesforce page.

It's also possible to add the Softphone Utility to other Salesforce apps as well. To do this:

1. Log into Salesforce.
2. Go to **Setup**.
3. Search for **App Manager**.
4. Click the down arrow next to the app you want to edit and click **Edit**.

***Note:** Only Lightning apps will work with the CTI Adapter.*

5. In the next screen, click **Utility Items** on the left.
6. Click **Add Utility Item**.
7. Select **Open CTI Softphone**.
8. Click **Save** at the bottom.

Now when you load this App in Salesforce, there should be a Phone tab at the bottom.

Uninstallation

To remove the NetFortris Salesforce CTI Adapter, follow these steps:

1. Log into Salesforce.
2. Go to **Setup** in the upper right corner (gear icon).
3. Search for **Installed Packages**.
4. Click **Uninstall** and follow the remaining instructions.

myHUD User Installation and Configuration

All Salesforce integration users will need to install myHUD and make a setting change for the CTI integration to work smoothly.

1. Download and install myHUD: <https://www.netfortris.com/comm-unity-myhud>
2. Login to myHUD with your Comm-unity user credentials.
3. Click your avatar in the bottom left and select **Settings**.
4. Under "General" settings, disable **Always open phone modal when receiving incoming call**.

User Guide

Introduction

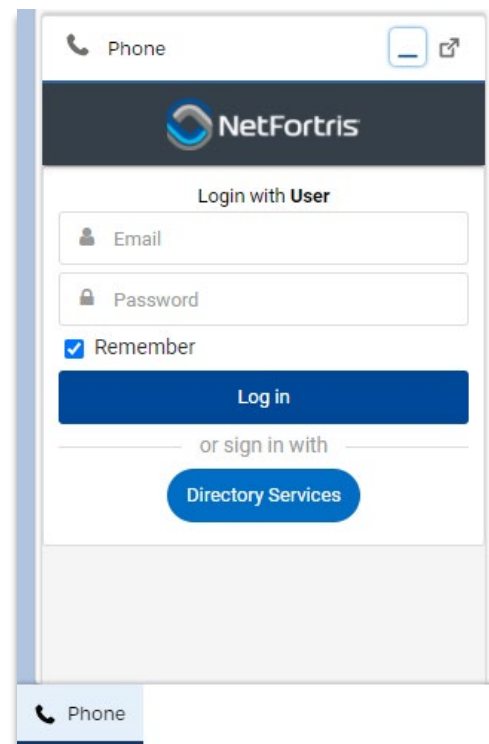
To utilize the NetFortris CTI Adapter, the following requirements must be met:

- Your Salesforce Admin has completed the set up and configuration instructions (above).
- You have an active Comm-unityY account with at least one user.
- Website Cookies must be enabled.
- myHUD is installed on your computer and has modified the appropriate settings (see “myHUD Installation and Configuration”).
- Your user is logged into myHUD.

Once an admin has set up the CTI adapter, go to the main Salesforce page and launch the **NetFortris CTI Adapter** App.

Click on the **Phone** tab to open.


Login to the adapter with your Comm-unity user credentials:



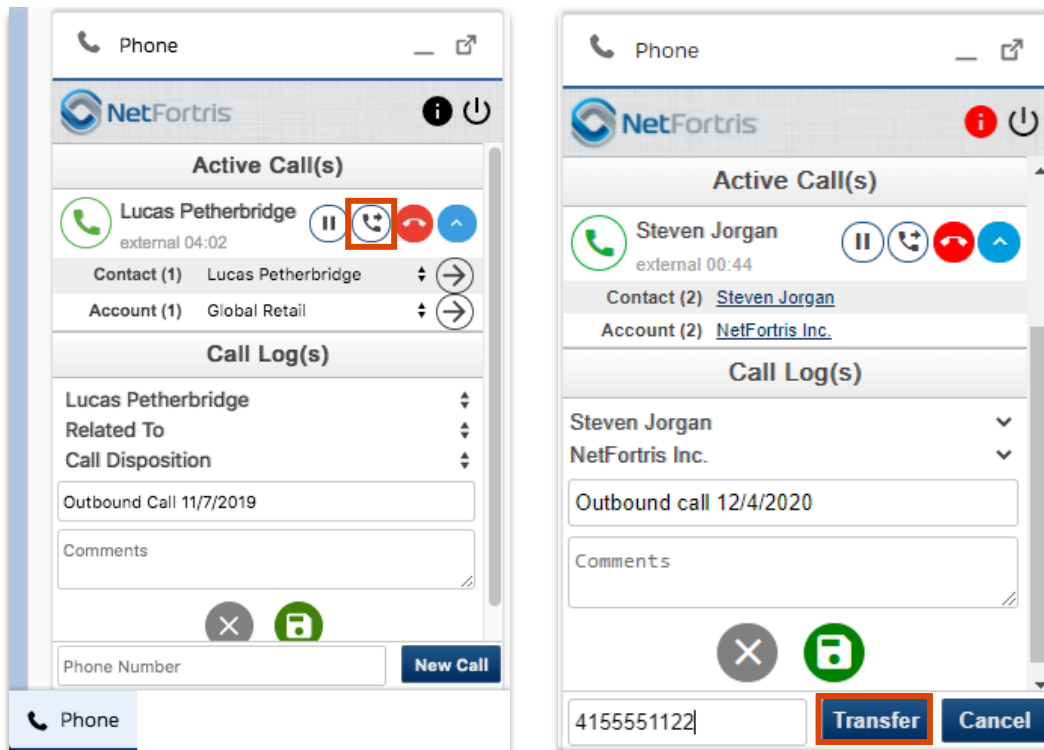
Placing / Receiving Calls

Placing and receiving calls from within the adapter -- or outside of the adapter -- will display call status in the adapter. The adapter also allows basic call control for answering, transferring, placing calls on hold, and ending calls.

Transferring Calls

- Click the **Transfer** Icon .
- Enter the number you wish to transfer to.
- Click the **Transfer** key to complete the transfer.

Note: The NetFortris CTI adapter can do blind transfers only.



Logging a Call Task

Inbound/Outbound calls will have the ability to log call comments which will appear in Task reports. This can be done while on a live call, or after the call was completed. Call logs related to known numbers within Salesforce will be attached to those records.

To log a task entry, go to the "Call Log(s)" section of the adapter. The subject of the task is pre-populated with the call direction and date. This can be modified. Enter the comments you wish to make and click the Save button, to retain the task comments.

Note: Inbound calls that match known records will honor the Screen Pop settings for the user.

Call Log Reports

To create and view Call Log Reports, follow these steps:

1. Click the **App Launcher** icon from the main Salesforce page.
2. Search for **Reports** and click it.
3. If a report hasn't already been created, click **New Report** in the upper right.
4. Search for **Tasks and Events**, click it and then click **Continue**.
5. Click **Filters** on the left.
6. Change "Show Me" to **My activities**, click **Done**.
7. Change Show to **Open & Completed Activities**, click **Apply**.
8. (Optional) Change the **Date**.
9. (Optional) Add the **Created Date** column by going back to "Outline" and search for and add **Created Date**. From there, refresh the page, click the arrow next to **Created Date** and **Sort Ascending**.
10. Click **Save and Run**.

Appendix: Adapter Limitations and Troubleshooting

Known Limitations

- Support for Internet Explorer 11 is not provided for the Salesforce Lightning Platform
- The Phone field is not visible by default on the Call Log records as it was in Classic. Salesforce may have a way to change this, but it is not clear or obvious how to do so in Lightning.
- The Call Log activity does not appear in the Feed section of Case records, but it does appear if you click Related and scroll to the Activity History. This affects Lightning but not Classic.

Troubleshooting

1. Opening the Phone table only displays bouncing blue dots or a rotating loading symbol.
 - On occasion, Salesforce may fail to load/redirect the CTI Adapter URL. This usually will be caused by network issues, or there's a DNS problem.
2. The HTML text, images, and layout is garbled.
 - If this is the case, just wait a few minutes and try refreshing again. The user may also need to do a hard refresh to clear the local cache.