



Salesforce Integration

Admin Guide

Document version 2.0 – October 14, 2016

This Administrator's Guide will enable a Salesforce Administrator to deploy the **Fonality Salesforce Integration** to your instance of Salesforce.

Prerequisites for installing the Fonality Salesforce Integration

- ✓ List of Salesforce Users
- ✓ List of HUD Web Users
- ✓ Fonality Administrator Control Panel (CP) access
- ✓ Log into Salesforce as a System Administrator
- ✓ Salesforce user email addresses must match the corresponding Fonality user email addresses as entered in the Fonality CP.

Installing Fonality Salesforce Integration

1. Retrieve Managed Package URL from Fonality knowledge base

2. Click on the Managed Package URL

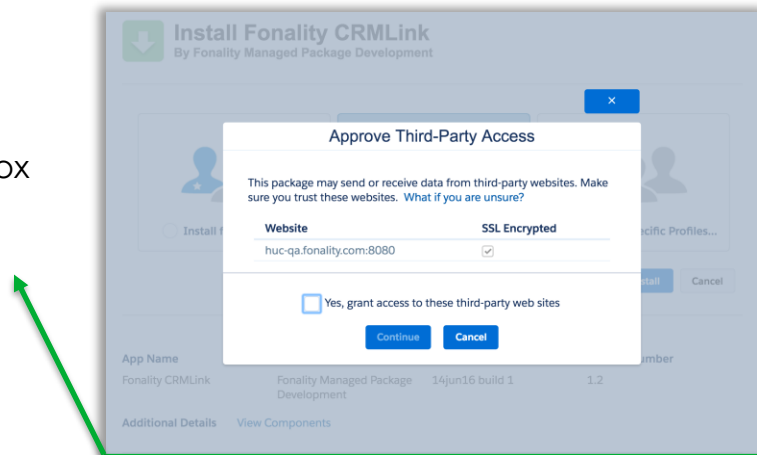
3. Select Installation options:

- Install for Admins Only
- Install for All Users* (Recommended)
- Install for Specific Profiles



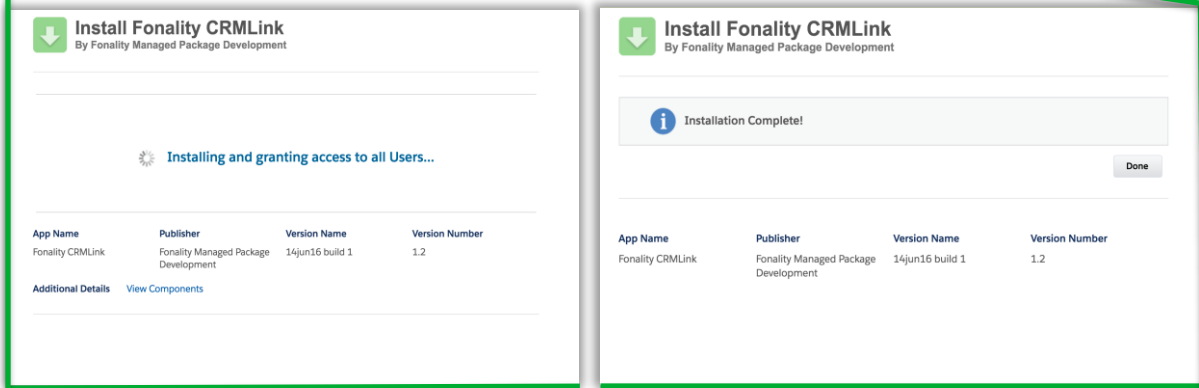
4. Approve Third Party Access

→ Grant
Fidelity
access by
checking the box



5. Installation will begin

6. Installation complete
→ Click Done

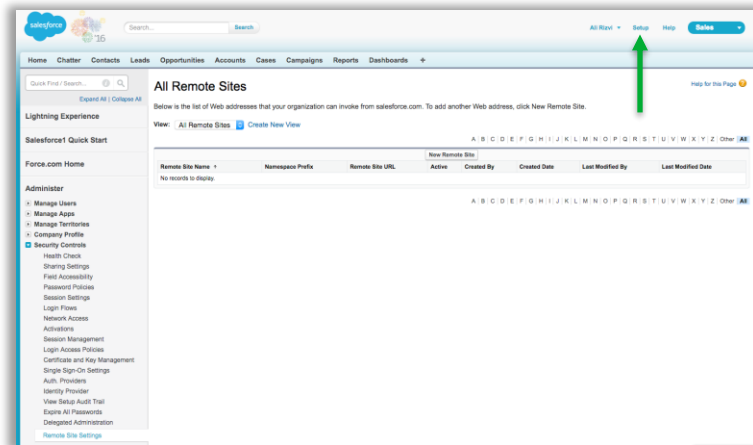


7. You will also receive additional confirmation from Salesforce Support regarding your successful package install via email.

Add a Remote Site

1. Click

- Set up
- Administer
- Security Controls
- Remote Site Settings
- New Remote Site



2. Enter

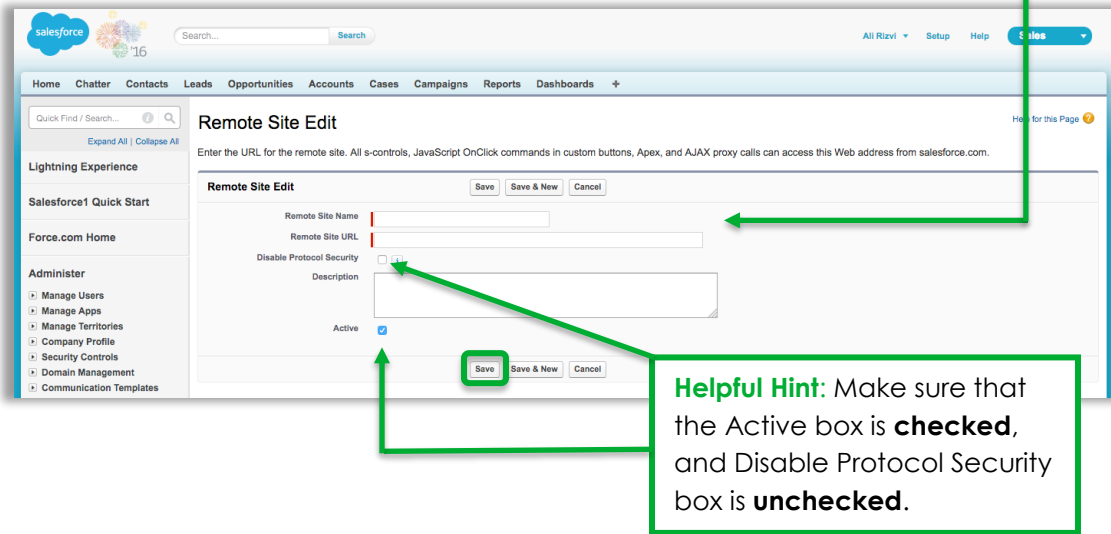
Remote Site Name: Fidelity_Salesforce

Remote Site URL: <https://sfa-cti.fidelity.com>

OR if you are a Trixbox customer,

Remote Site URL: <https://fdp-huc-v5.trixbox.com>

3. Click → **Save**



Getting Server Token

1. Click → **Fonality Settings Tab**

2. Enter

Server URL: <https://sfa-cti.fonality.com>

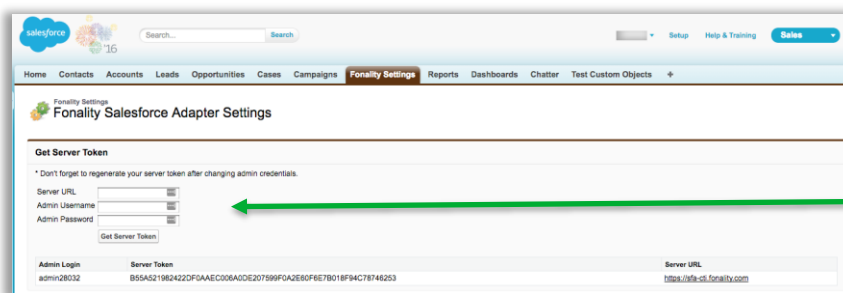
OR if you are a Trixbox customer,

Server URL: <https://fdp-huc-v5.trixbox.com>

Admin Username: (the Fonality CP Admin Username goes here)

Admin Password: (the Fonality CP Admin Password goes here)

3. Click → **Get server token**



Adding Users to Call Center

1. Click → **Setup**
2. Under **Build**
 Click → **Customize** → **Call Centers**
Call Center is automatically created
 Click → **Edit**

All Call Centers Help for this Page ?

A call center corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce.com users must be assigned to call center before they can use any Call Center features.

Action	Name ↑	Version	Created Date	Last Modified Date
Edit Del	Fonality Call Center		9/12/2016 12:09 PM	9/12/2016 12:09 PM

Change **CTI Adapter URL** to
<https://sfa.fonality.com/SFAdapter/>
 Click → **Save**

Call Center Edit
Fonality Call Center Help for this Page ?

All Call Centers > Fonality Call Center

Call Center Edit Save Cancel

General Information ! = Required Information

Internal Name !
 Display Name
 CTI Adapter URL ← !
 Use CTI API
 Softphone Height
 Softphone Width

Dialing Options

Outside Prefix
 Long Distance Prefix
 International Prefix

Other Options

Logging Disabled (Y or N)

Save Cancel

3. Click → **Fonality Call Center**

 Click → **Manage Call Center Users**

Call Center
Fonality Call Center Help for this Page ?

All Call Centers > Fonality Call Center

Call Center Detail Edit Delete Clone

General Information

Internal Name
 Display Name
 CTI Adapter URL
 Use CTI API
 Softphone Height
 Softphone Width

Dialing Options

Outside Prefix
 Long Distance Prefix
 International Prefix

Other Options

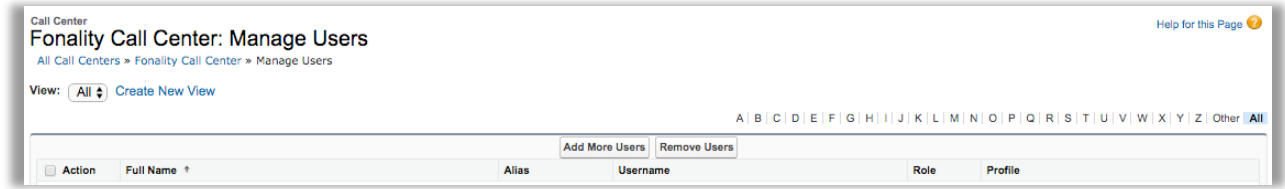
Logging Disabled (Y or N)

Call Center Users Manage Call Center Users Call Center Users Help ?

Call Center Users by Profile

Standard User	5
System Administrator	1
Total	6

Click → **Add More Users**

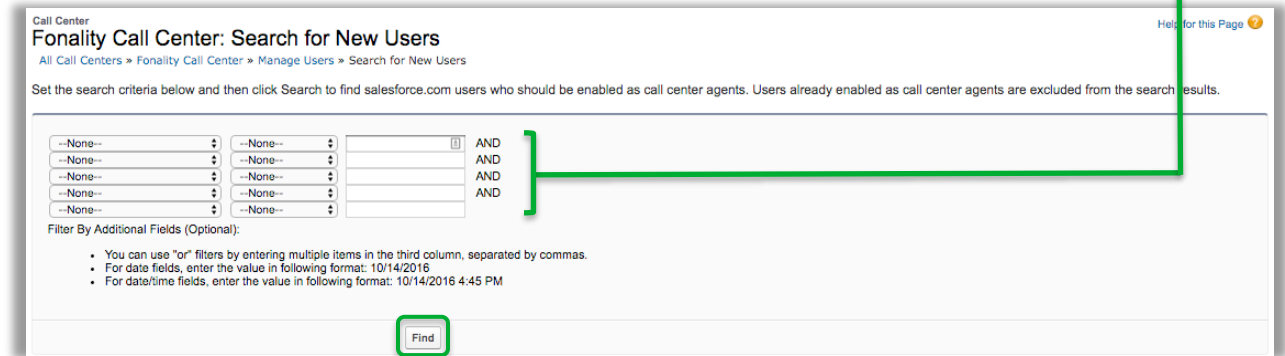


Enter Name(s) in the search field

Click → **Find**

Place a Check mark for the User(s) you would like to add

Click → **Add to Call Center**



Adding a SoftPhone Layout

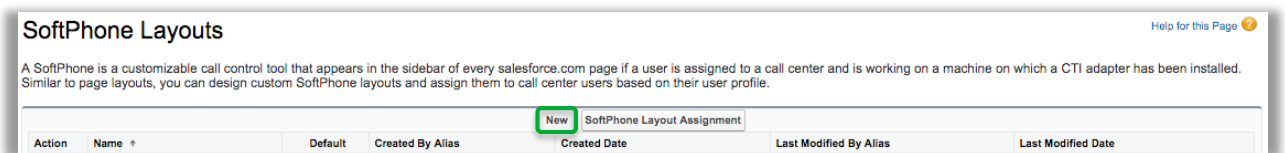
1. From **Setup**

Click → **Customize**

Click → **Call Center**

Click → **SoftPhone Layouts**

Click → **New**



Enter a **Name**

Customize your settings under SoftPhone Layout and CTI 2.0 or Higher Settings.

Check → **Is Default Layout** box

Click → **Save**

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 Is Default Layout

Select Call Type

Softphone Layout Help about this section

Display these call-related fields:

- ▶ Caller ID, Dialed Number Edit

Display these salesforce.com objects:

- ▶ Contact, Lead, Task, Account, Opportunity, Case, Campaign Add / Remove Objects
- ▶ If single Contact found, display: Name Edit
If multiple matches found, only Name is displayed.
- ▶ If single Lead found, display: Name, Company Edit
If multiple matches found, only Name is displayed.
- ▶ If single Task found, display: Subject, Comments Edit
If multiple matches found, only Subject is displayed.
- ▶ If single Account found, display: Account Name Edit
If multiple matches found, only Account Name is displayed.
- ▶ If single Opportunity found, display: Opportunity Name Edit
If multiple matches found, only Opportunity Name is displayed.
- ▶ If single Case found, display: Case Number Edit
If multiple matches found, only Case Number is displayed.
- ▶ If single Campaign found, display: Campaign Name Edit
If multiple matches found, only Campaign Name is displayed.

Preview

Line 1	On Call
Caller ID	1-415-555-1212
Dialed Number	1-415-555-1212
Contact (2)	Dr. Sarah Samp... Dr. Sarah Samp...
Lead (2)	Dr. Sarah Samp... Dr. Sarah Samp...
Task (2)	My Record My Record
Account (2)	My Record My Record
Opportunity (2)	My Record My Record
Case (2)	My Record My Record
Campaign (2)	My Record My Record
Line 2	Incoming Call