

How to configure caller recognition and screen-pop for:

## Salesforce

Supported versions: Spring 2012 and higher; Enterprise edition and higher

Contact replication method: SOAP API/REST API

Screen pop method: URL

### Prerequisites

The Salesforce integration uses the Salesforce the SOAP API interface for replication and the OpenCTI for click to dial. To use the SOAP API you will require an account with an Enterprise Edition (see [here](#)). For Salesforce OpenCTI you will require “Salesforce CRM Call Center”. Salesforce OpenCTI supports the following minimum browser requirements: Internet Explorer 8; Firefox 3.6; Safari 4; or Chrome 11.0.

### Security token

The Recognition Tool requires access via the SOAP API, therefore the account which is will be used for data-synchronization has to provide a security token. Users can obtain their security token by changing their password or resetting their security token via the Salesforce user interface "Setup > Personal Setup > Reset Security Token"

If a user changes their password or resets their security token, Salesforce sends a new security token to the email address on the user’s Salesforce record. The security token is valid until a user resets their security token, changes their password, or has their password reset.

For more information about tokens, see “Resetting Your Security Token” in the Salesforce online help.

### .Net Framework

In June 2016 Salesforce announced they would no longer support TLS 1.0. To work with TLS 1.1 and TLS 1.2 the minimally installed version of the .Net Framework should be 4.5.2. Please note that this is not standard on Windows Vista. You can update the .Net Framework here: <https://www.microsoft.com/en-us/download/details.aspx?id=48130>

## Notes

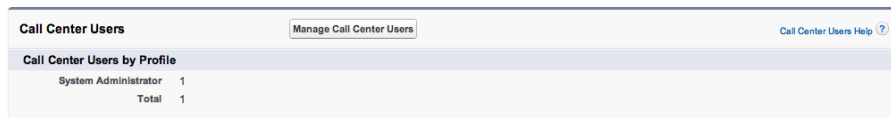
We offer a “CloudCTI CTD Adapter” which you can use to enable click-to-dial phone numbers within Salesforce. The CloudCTI CTD Adapter can be installed via an AppExchange package. Instructions on how to setup the call control and it’s usage are documented below.

### To install:

Install the “Tel Click-To-Dial Adapter” AppExchange package from the web. You can download the package from this url: <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1t00000311Ra>

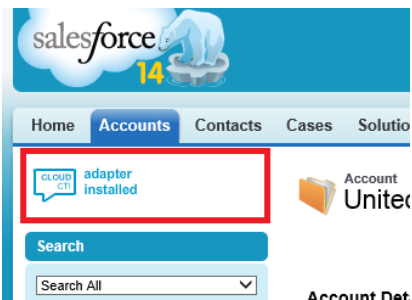
Finally, add your user to the Call Center (see [https://help.salesforce.com/HTViewHelpDoc?id=cti\\_admin\\_manageagentsadd.htm&language=en\\_US](https://help.salesforce.com/HTViewHelpDoc?id=cti_admin_manageagentsadd.htm&language=en_US))

Under Manage Users for the Call Center just created, add your user(s)



Call Center Users by Profile	
System Administrator	1
<b>Total</b>	<b>1</b>

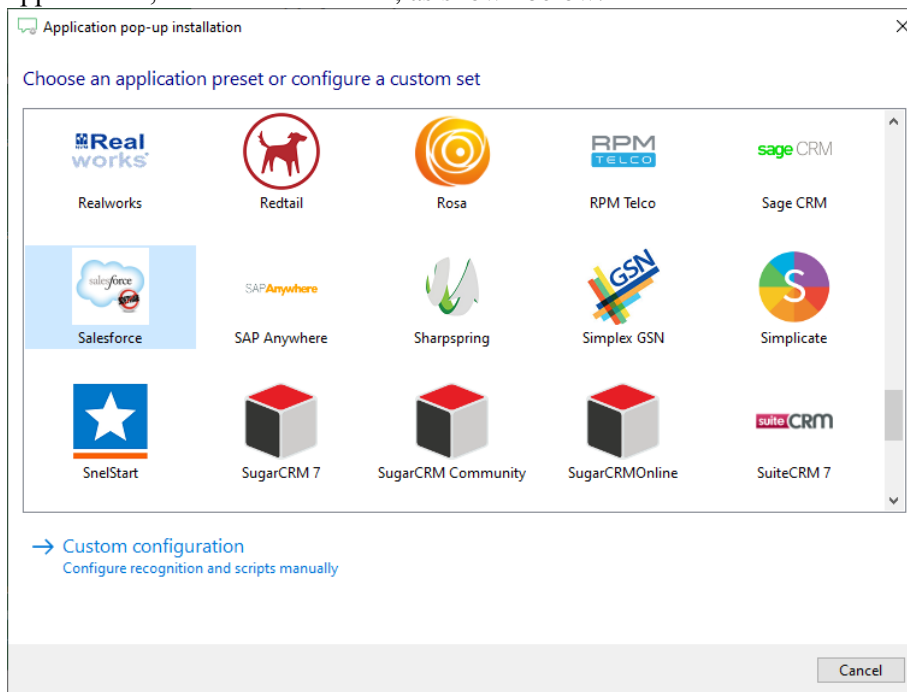
After successful installation you will see the “CloudCTI adapter installed” logo in the upper-left corner of the “Accounts” tab. Phone numbers will be highlighted as hyperlinks.



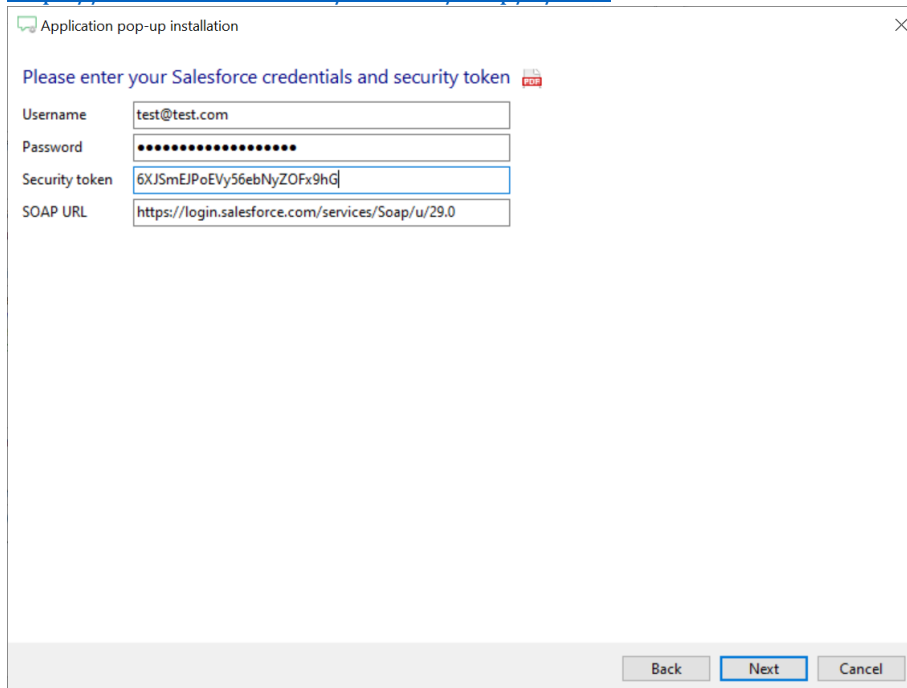
Phone	<a href="#">+44 191 4956203</a>
Home Phone	
Mobile	<a href="#">+44 191 3456234</a>
Other Phone	
Fax	+44 191 4956620

## Configuration steps

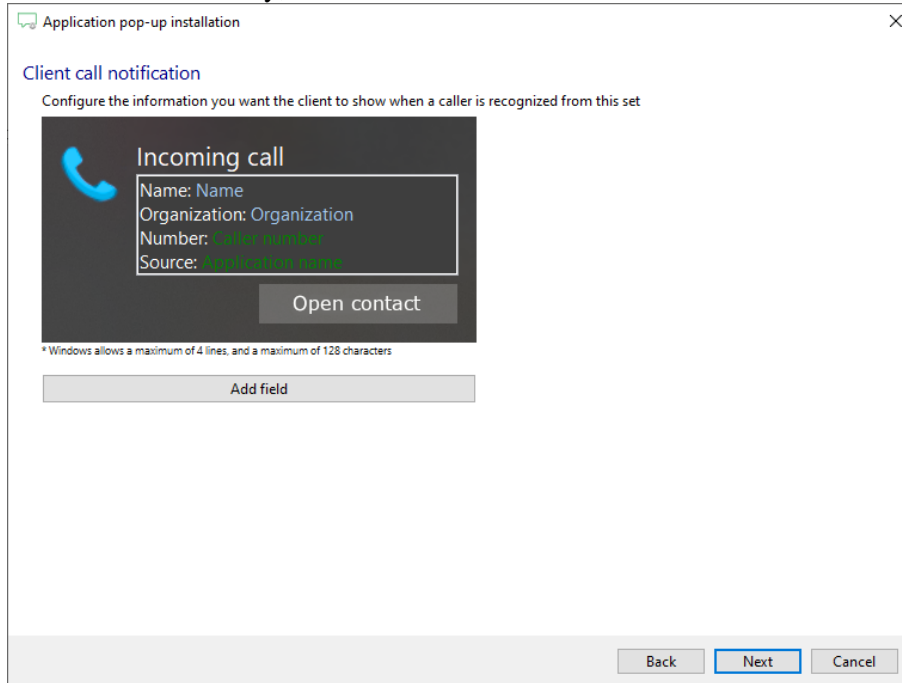
- 1) Start by clicking 'add application' in the Recognition Configuration Tool. From the list of applications, choose 'Salesforce', as shown below.



- 2) Enter your Salesforce user credentials and security token. It's possible to change the SOAP login URL to a custom SOAP URL or Sandbox environment. A Sandbox environment requires the URL: <https://test.salesforce.com/services/soap/u/29.0>. Click 'Next' to continue.



3) Check and if necessary, alter the client call notification. Click 'next' to continue.



Application pop-up installation

**Client call notification**  
Configure the information you want the client to show when a caller is recognized from this set

**Incoming call**

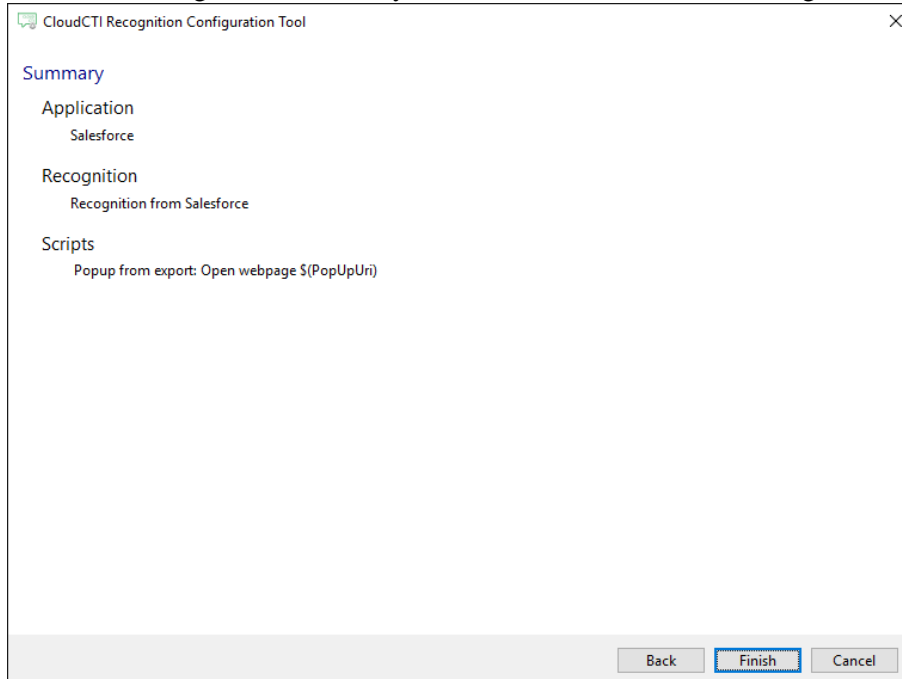
Name: Name  
 Organization: Organization  
 Number: (416) 555-1234  
 Source: Application name

Open contact

\* Windows allows a maximum of 4 lines, and a maximum of 128 characters

Add field

4) Check the configuration summary and click 'Finish' to add the recognition from Salesforce



CloudCTI Recognition Configuration Tool

**Summary**

- Application
  - Salesforce
- Recognition
  - Recognition from Salesforce
- Scripts
  - Popup from export: Open webpage \$(PopUpUri)