

## Overview

This guide is designed to walk through the key steps for implementing the ShoreTel for Salesforce browser based integration in your Salesforce instance to connect with ShoreTel Connect CLOUD or Connect ONSITE extensions. In addition, this guide will highlight the key settings that the Salesforce administrator should review to ensure optimal performance for the intended usage. This is not intended to be a comprehensive guide. For complete documentation, please refer to the ShoreTel for Salesforce Administration Guide for Connect.

## Prerequisites

### Connect CLOUD

- Users must have Standard Profiles or above

### Connect ONSITE

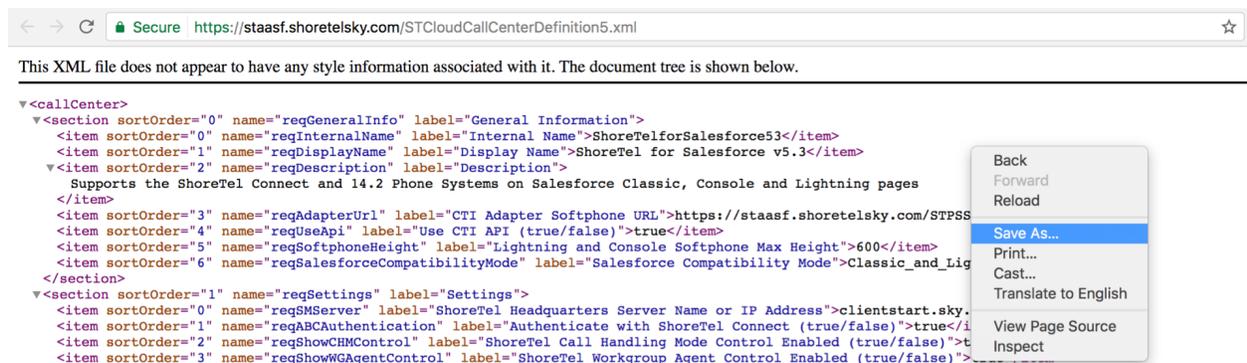
- ShoreTel server(s) must be provisioned with a root signed SSL cert. See the ShoreTel Connect Administration Guide, Chapter 4, for more information.
- The Applications Licensing Server must be installed on the HQ/Director server.
- A trial or permanent Salesforce Call Center Adapter license key for the required number of users must be installed on the Applications Licensing Server.

## Step 1 – Download the Call Center configuration file

Click the following link. Note that this will display a technical configuration file rather than a formatted page. This is normal.

<https://staasf.shoretelsky.com/STCloudCallCenterDefinition5.xml>

Save the web page to the desktop by using the browser “Save As...” command. This typically can usually be accessed in the web browser by right clicking on a blank area of the web page.

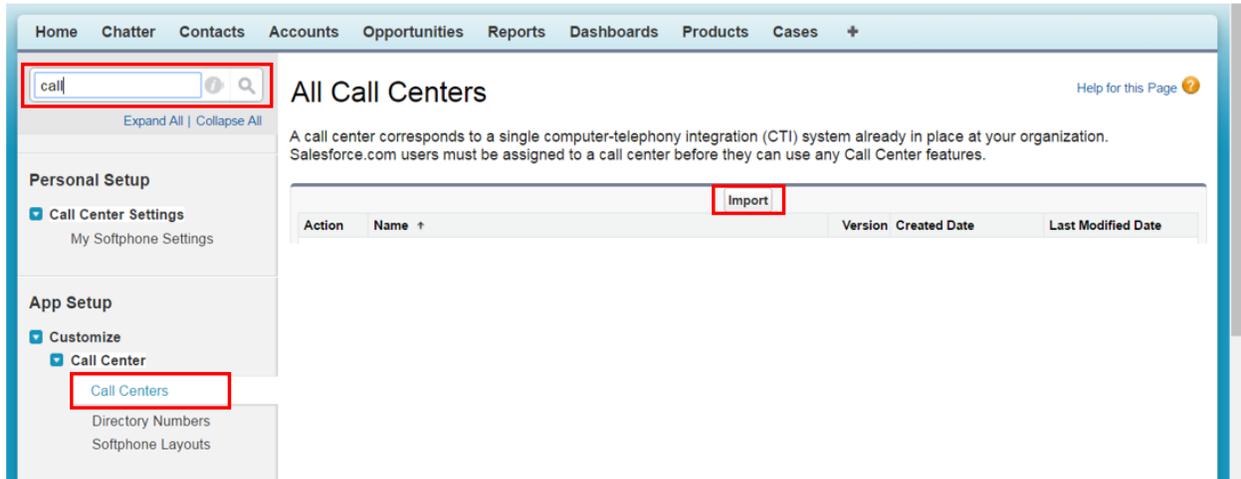


Select a location such as your desktop and click the Save button to save the file. The file name should default to “STCloudCallCenterDefinition5.xml”.

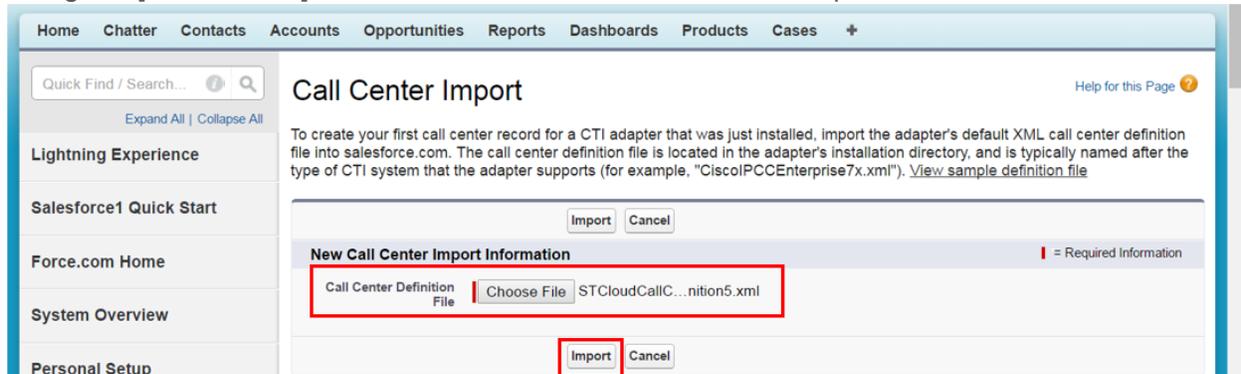
## Step 2 - Import the Call Center Definition into Salesforce

Log into Salesforce with administrator credentials and go to “Setup”. In the quick find box, type in “call”.

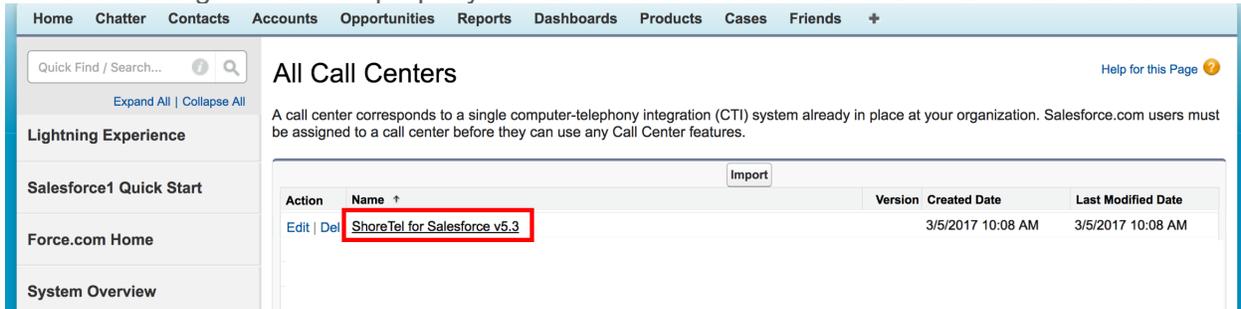
On the “All Call Centers” screen, click the Import button:



Using the [Choose File] button, select the file downloaded in Step 1.



The below image shows the properly installed “ShoreTel for Salesforce 5.3” call center:



### Step 3 – Review key settings on Call Center configuration

This section only covers some of the settings in the Call Center configuration. Refer to the *ShoreTel for Salesforce – Administration Guide for Connect* for a complete list.

Click on the “ShoreTel Adapter Version 5.3” Call Center created in Step 2. Click [Edit] at the top to make changes. Click [Save] at the top to save changes.

Call Center Help for this Page ?

## ShoreTel for Salesforce v5.3

All Call Centers » ShoreTel for Salesforce v5.3

**Call Center Detail** Edit Delete Clone

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**General Information**

Internal Name	ShoreTelforSalesforce53
Display Name	ShoreTel for Salesforce v5.3
Description	Supports the ShoreTel Connect and 14.2 Phone Systems on Salesforce Classic, Console and Lightning pages
CTI Adapter Softphone URL	https://staasf.shoretelsky.com/STPSSFSofthphone.htm
Use CTI API (true/false)	true
Lightning and Console Softphone Max Height	600
Salesforce Compatibility Mode	Classic_and_Lightning

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**Settings**

ShoreTel Headquarters Server Name or IP Address	clientstart.sky.shoretel.com
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Some of the settings to review:

- **CTI Adapter Softphone URL:**

The URL should always be “<https://staasf.shoretelsky.com/STPSSFSofthphone.htm>” for both Connect CLOUD and Connect ONSITE systems.

- **ShoreTel Headquarters Server Name or IP Address**

Connect CLOUD: **clientstart.sky.shoretel.com**

Connect ONSITE: The fully qualified domain name (FQDN) of either the ShoreTel HQ server or Edge-Proxy.

**Note: The Connect ONSITE ShoreTel HQ (and DVS) server(s) must have a root-signed SSL cert from a recognized cert provider. The ShoreTel Connect ONSITE system generates self-signed certs when you install the software. While these self-signed certs will work for the Connect Client and the 400 series phones, workstation browsers do not honor self-signed certs by default and so will not allow the connection. The self-signed cert needs to be replaced with a root-signed cert using the process described in the ShoreTel Connect Administration Guide.**

- **Inbound Call Log Results (Result 1, ...)**

This list of values causes the softphone to display the call result picklist control as part of the call log for **inbound** external calls. This allows the user to categorize the nature or

outcome of the call which can then drive reports or dashboards. Each call result value should be enclosed in quotes and separated by a comma. For example:

"New Lead - Req Proposal", "New Lead - Placed order", "Existing Customer - New Order"

- **Outbound Call Log Results (Result 1, ...)**

This list of values causes the softphone to display the call result picklist control as part of the call log for **outbound** external calls. This allows the user to categorize the nature or outcome of the call which can then drive reports or dashboards. Each call result value should be enclosed in quotes and separated by a comma. For example:

"New Lead - Req Proposal", "Existing Customer - New Order", "Left Message"

- **Keep Call Logs Open after Call Disconnect**

This setting controls whether the softphone will keep call logs open after the call disconnects or, for workgroup calls, after the agent moves back to ready-for-calls. It should be set to either 'true', 'false' or 'save'.

**true** – The call log will stay open in edit mode and offer the user the option to [Save] which will make an entry in the Salesforce Activity History or [Discard] which will delete the call log and not make an entry in Salesforce.

**Note:** If "true", the call will not be logged in Salesforce if the user does not manually click the [Save] button after each call.

**false** – The call log will automatically close and create the Activity History entry in Salesforce. The user will still have the option to edit the call log notes and other settings by clicking the pencil icon. If they click the pencil icon, the options will be [Update] to update the Activity History entry already created in Salesforce or [Cancel] to close the log and disregard any changes made.

**save** – The call log will automatically close and create the Activity History entry in Salesforce. However, the call log will stay open in edit mode with the options [Update] to update the Activity History entry already created in Salesforce or [Cancel] to close the log and disregard any changes made.

## Step 4 – Assign users to Call Center to activate the integration

Make sure that the Call Center is saved if you made any changes in Step 3. Scroll to the bottom of the Call Center configuration and click [Manage Call Center Users].

Keep Call Logs Open after Call Disconnect (true/false)	false
Recent Call Logs Count	3
<b>Advanced Call Log Settings - Note: These settings require the optional Apex class STPSSoftware be installed in the customer's organization.</b>	
Record Type	
Outbound Call Input Fields (fieldname*][=ShoreTel Field], ...)	Group__c, Urgent__c, ActionPlan__c
Inbound Call Input Fields (fieldname*][=ShoreTel Field], ...)	Group__c=property(_STCC_Group), Urgent__c="True", ActionPlan__c="Do Something"
<b>Call Center Users</b> <span style="float: right;"><a href="#">Manage Call Center Users</a> <a href="#">Call Center Users Help ?</a></span>	
<b>Call Center Users by Profile</b>	
System Administrator	1
Total	1

Click [Add More Users]

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						
<span style="border: 1px solid red; padding: 2px;">Add More Users</span> <span>Remove Users</span>						
<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Profile	
<input type="checkbox"/>   Remove	Apps, Alan	IM3			System Administrator	

Search for the specific user(s). Check the box next to their name(s). Click [Add to Call Center].

First Name	equals	Patricia	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: 4/16/2017
- For date/time fields, enter the value in following format: 4/16/2017 9:57 PM

Find

<span style="border: 1px solid red; padding: 2px;">Add to Call Center</span> <span>Cancel</span>				
<input checked="" type="checkbox"/> Full Name	Alias	Username	Role	Profile
<input checked="" type="checkbox"/> Jackson, Patricia	PJackson	pjackson@demo.com		Sales Demo User

**Note:** To switch a user from an existing call center to a new one, you will need to first remove the user from the existing call center.

## Step 5 – Configure Softphone Layout

Go to “Setup”. In the quick find box, type in “call”.

Click the Edit link next to the Default SoftPhone Layout.:

**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
<a href="#">Edit</a>	Default SoftPhone Layout	<input checked="" type="checkbox"/>	<a href="#">kpowern</a>	2/23/2007 12:30 PM	<a href="#">TM3</a>	5/6/2015 9:09 AM

The top section controls the database objects that are searched when a call is received. The default configuration includes Lead, Contact and Account. If you need to include other database objects that contain phone number fields, click the Add/Remove Objects link.

## 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 profiles by clicking Layout Assignment in the Softphone Layouts page.

**Softphone Layout Edit** Help for this 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, Queue, Segment Edit

**Display these salesforce.com objects:**

- ▶ Lead, Case, Campaign, Contact Add / Remove Objects

▶ **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

▶ **If single Case found, display:** Case Number  
*If multiple matches are found, only the Case Number is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.* Edit

▶ **If single Campaign found, display:** Campaign Name  
*If multiple matches are found, only the Campaign 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

The bottom section controls the behavior of the integration.

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  ▼

Pop to Visualforce page  🔍

▼ **Single-matching record:** Pop detail page Collapse

Don't pop any screen

Pop detail page

Pop to Visualforce page  🔍

▼ **Multiple-matching records:** Pop to search page Collapse

Don't pop any screen

Pop to search page

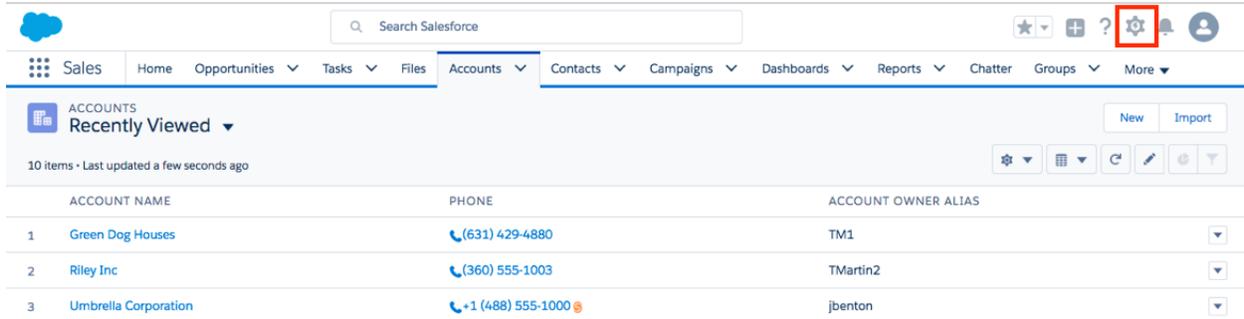
Pop to Visualforce page  🔍

- **Screen pops open within** – Screen pops can occur in the current browser tab or open a new tab. The default is to pop within the existing tab. **If you are using the Classic pages, we recommend the “New browser window or tab” option. If you are using Lightning pages, we recommend the “Existing browser window” option.**
- **No matching records** – If no record with a matching phone number is found, the integration can do nothing, pop a new record (ex. a new Lead), or pop a custom Visualforce page. The default is to do nothing.
- **Single-matching record** – If the phone number of the caller is found on a single record, the integration can do nothing, pop the detail page where the phone number was found or pop a custom Visualforce page. The default is to pop the detail page.
- **Multiple-matching records** – If the phone number of the caller is found on several records, the integration can do nothing, pop a search page listing or pop a custom Visualforce page. The default is to do nothing. **We recommend popping the search page.**

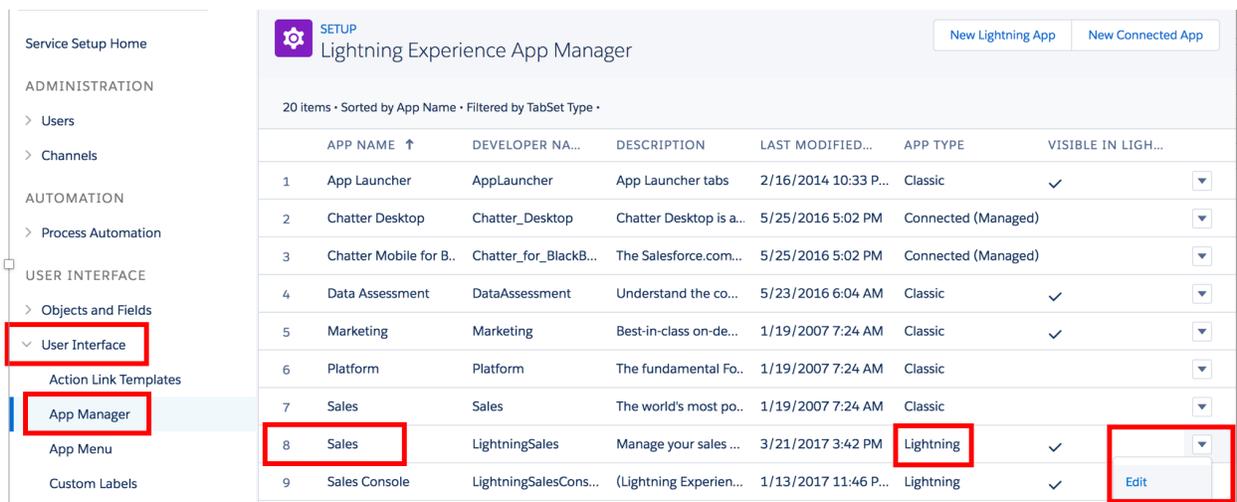
## Step 6 – Adding the CTI Softphone to the Lightning Toolbar (optional)

This step only applies if you wish to use the ShoreTel for Salesforce integration on Lightning. If not, please proceed to step 7.

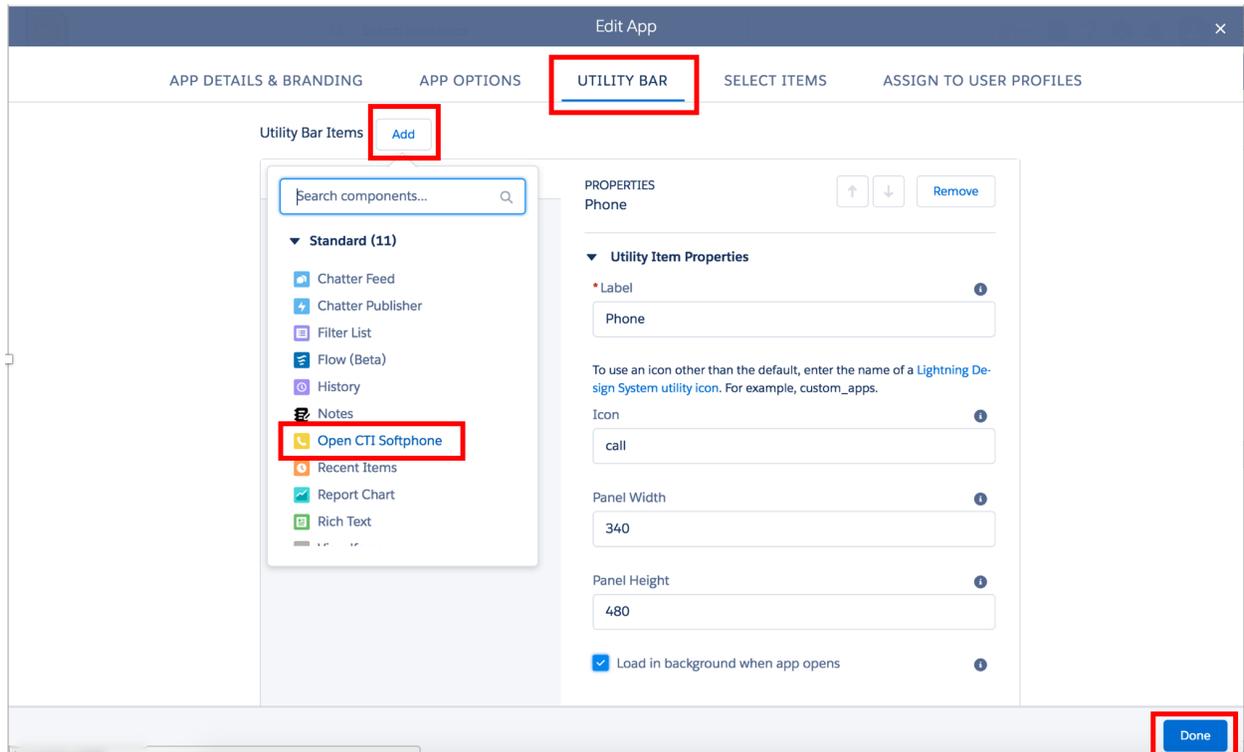
- ✓ Switch to the Lightning Experience if not already there.
- ✓ Click the gear icon and select Setup.



- ✓ Select User Interface > App Manager
- ✓ Find the app that your team uses. For example, the Sales App. Note that this must be a Lightning type app. Click the down arrow on the right and select Edit.



- ✓ Select the Utility Bar.
- ✓ Click Add
- ✓ Select the Open CTI Softphone
- ✓ Click Done.



### Step 7 – Load APEX package (Optional)

There are several additional optional features of ShoreTel for Salesforce that are enabled by installing an additional package containing mainly some additional Apex Classes. This package is required to enable the following features:

- Use an existing Task Activities to seed a call note when making calls from open Task Activities advantage and/or navigate to an existing open Task Activity record and use it to seed the current call note.
- Configure additional Salesforce Task Activity fields to show up in the call note areas of the softphone.
- Support record search by alternate ID (for example, an account number from a Contact Center Call Profile field).

**NOTE: This package can only be installed in the Salesforce Enterprise Edition or higher. The package is not supported on the Salesforce Professional Edition.**

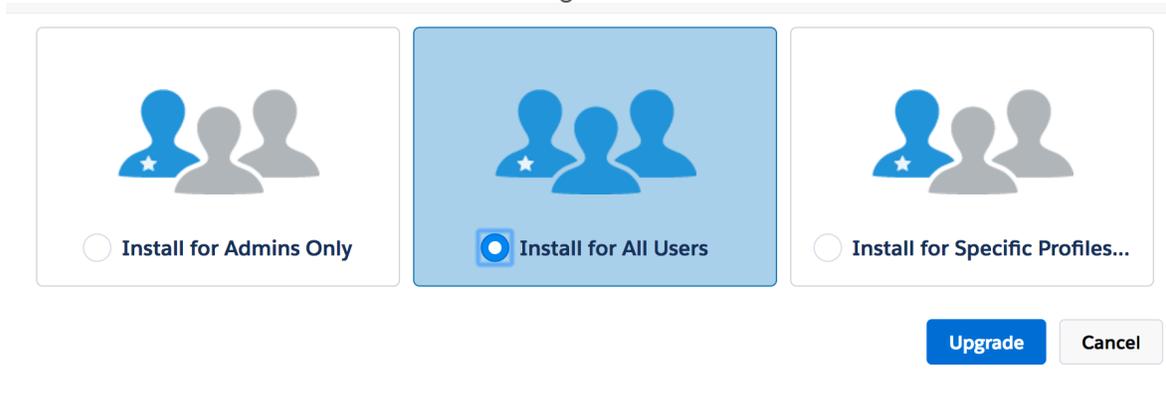
To install the package in the PRODUCTION instance, the customer's Salesforce Administrator will need to access this URL:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t50000000LlrT>

To install the package in the SANDBOX instance, the customer's Salesforce Administrator will need to access this URL:

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04t50000000LlrT>

Follow the instructions. Permission should be granted to all users.



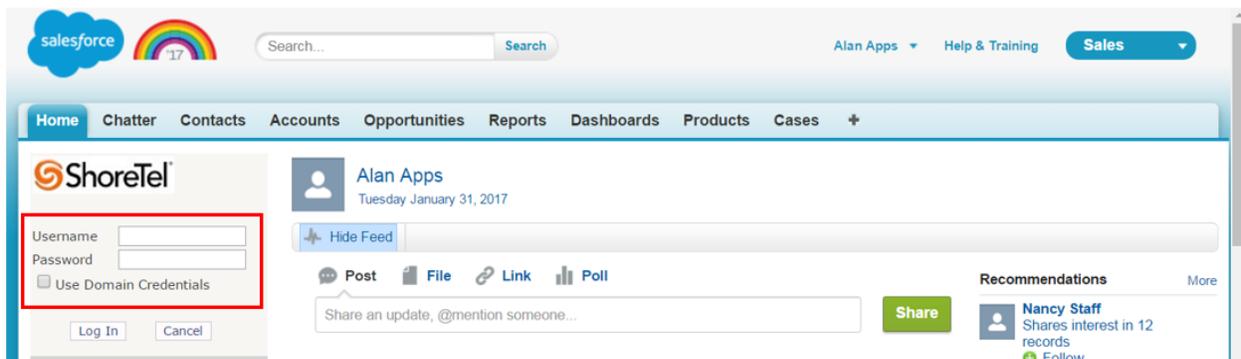
The screenshot shows a Salesforce package installation interface. It features three radio button options for user selection: 'Install for Admins Only', 'Install for All Users' (which is selected and highlighted in blue), and 'Install for Specific Profiles...'. Below these options are two buttons: 'Upgrade' and 'Cancel'.

App Name	Publisher	Version Name	Version Number
STPSSoftphone_5.1_Apex	ShoreTel	ShoreTel Cloud Adapter Apex 2.0 Code Version 5.1	

## Step 8 – Ready to test

Login using ShoreTel your extension credentials.

Note: The “Use Domain Credentials” option allows you to login without entering your username/password. For this option to work, the ShoreTel user profile must be linked to an AD user account AND the user must be on the corporate network or have an active VPN connection. If the user is off-net, they should enter their username and password.



After entering your credentials, the softphone should display as follows:

