

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:

| Home Chatter Contacts A | ccounts Opportunities Reports Dashboards Products Ca | ses + |
|---|--|---|
| | All Call Centers | Help for this Page 🕢 |
| | A call center corresponds to a single computer-telephony integration (CTI) Salesforce.com users must be assigned to a call center before they can u |) system already in place at your organization. se any Call Center features. |
| Personal Setup | Import | |
| Call Center Settings My Softphone Settings | Action Name + | Version Created Date Last Modified Date |
| App Setup | | |
| Customize | | |
| Call Centers | | |
| Directory Numbers | | |
| Sompnone Layouts | | |

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

| Home Chatter Contacts A | Accounts Opportunities Reports Dashboards Products Cases + |
|---------------------------|---|
| Quick Find / Search 🕖 Q | Call Center Import Help for this Page 🥹 |
| Expand All Collapse All | To create your first call center record for a CTI adapter that was just installed, import the adapter's default XML call center definition file into salesforce.com. The call center definition file is located in the adapter's installation directory, and is typically named after the type of CTI system that the adapter supports (for example, "CiscoIPCCEnterprise7x.xml"). <u>View sample definition file</u> |
| Salesforce1 Quick Start | Import Cancel |
| Force.com Home | New Call Center Import Information = Required Information Call Center Definition = Required Information |
| System Overview | Choose File ST CloudCallCnition5.xml |
| Personal Setup | Import Cancel |

The below image shows the properly installed "**ShoreTel for Salesforce 5.3**" call center: Home Chatter Contacts Accounts Opportunities Reports Dashboards Products Cases Friends +

| Quick Find / Search 0 Q Expand All Collapse All | All Ca | all Centers | | | | Help for this Page 🥜 |
|--|---------------------------|---|--|--------------------|-----------------------|--------------------------|
| Lightning Experience | A call cent be assigne | er corresponds to a single cor ed to a call center before they | nputer-telephony integration (CTI) system a can use any Call Center features. | Iready in place at | your organization. Sa | alesforce.com users must |
| | | | Import | | | |
| Salesforce1 Quick Start | Action | Name 🕇 | | Version | Created Date | Last Modified Date |
| Force.com Home | Edit De | ShoreTel for Salesforce v5.3 | | | 3/5/2017 10:08 AM | 3/5/2017 10:08 AM |
| System Overview | | | | | | |

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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 ShoreTel for Sales All Call Centers » ShoreTel for | Salesforce v5.3 | Help for this Page 💡 |
|--|---|----------------------|
| Call Center Detail | Edit Delete Clone | |
| 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/STPSSFSoftphone.htm | |
| Use CTI API (true/false) | true | |
| Lightning and Console Softphone Max Height | 600 | |
| Salesforce Compatibility Mode | Classic_and_Lightning | |
| Settings | | |
| ShoreTel Headquarters Server Name or IP Address | clientstart.sky.shoretel.com | |

Some of the settings to review:

• CTI Adapter Softphone URL:

The URL should always be "https://staasf.shoretelsky.com/STPSSFSoftphone.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 |
| Advanced Call Log Settings - | Note: These settings require the optional Apex class STPSSoftphone be installed in the customer's organization. |
| 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" |
| Call Center Users | Call Center Users Help ? |
| Call Center Users by Profile | |
| System Administrator | 1 |
| Total | 1 |

Click [Add More Users]

| | | | | A B C | DIEIFIGIH | IJKL | | F Q K | 3 1 0 1 | | All |
|------------|-------------|------------|----------|----------------|--------------|------|------|----------|--------------|--|-----|
| | | | | Add More Users | Remove Users | | | | | | |
| Action | Full Name 🕇 | Alias | Username | | | | Role | Profile | | | |
| □ Remove | Apps, Alan | <u>TM3</u> | | | | | | System A | dministrator | | |

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

| First Name | ᅌ equ | uals ᅌ | Patricia | ND | | | | |
|--|------------|--------|-----------------|-------------|------|---------|--|--|
| None | ○N | Ione ᅌ | | AND | | | | |
| None | ᅌ (N | Ione ᅌ | | AND | | | | |
| None | 🗢N | Ione ᅌ | | AND | | | | |
| None | 🗢N | Ione 📀 | | | | | | |
| 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 | | | | | | |
| | | Find | | | | | | |
| | | Find | Add to Call Ce | Cancel | | | | |
| 🕑 Full Name | | Find | Add to Call Cer | nter Cancel | Role | Profile | | |

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 .:

| cail 0 Q | Softp | hone Layouts | | | | | Help for this Page 🕜 |
|--|--------------------------------------|---|-------------------------------------|---|--|---|--|
| Expand All Collapse All Personal Setup | A softphor on which a profile. | ne is a customizable call control a CTI adapter has been installed | tool that appea . Similar to pag | ars in the sidebar c ge layouts, you cai | f every salesforce.com page i n design custom softphone lay | f a user is assigned to a call o routs and assign them to call | center and is working on a machine center users based on their user |
| Call Center Settings | | | | New | Softphone Layout Assignment | | |
| My Softphone Settings | Action | Name 🛧 | Default | Created By Alias | Created Date | Last Modified By Alias | Last Modified Date |
| | Edit | Default SoftPhone Layout | ✓ | kpowers | 2/23/2007 12:30 PM | <u>TM3</u> | 5/6/2015 9:09 AM |
| App Setup | | | • | | | | |
| Customize | | | | | | | |
| Call Center | | | | | | | |
| Call Centers | | | | | | | |
| Directory Numbers | | | | | | | |
| Softphone Layouts | | | | | | | |

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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.

| Save Cancel | |
|--|------------------------------------|
| Name Default SoftPhone Layou 🗸 Is Default Layout | |
| Select Call Type Inbound | |
| 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 select | Edit cted fields are displayed. |
| 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 displayed. | Edit elected fields are |
| If single Campaign found, display: Campaign Name If multiple matches are found, only the Campaign Name is displayed in Salesforce Classic. In Lightning Experience, a displayed. | all the selected fields are |
| If single Contact found, display: Name If multiple metabox are found, ask the Name is displayed in Selectores Classic, In Lightning Experience, all the selectores | Edit |

Help for this Page 🕜

| ShoreTel f | or Salesforce - | - Quick Start | Guide |
|------------|-----------------|---------------|-------|
|------------|-----------------|---------------|-------|



The bottom section controls the behavior of the integration.

| creen 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 |
| Obn't pop any screen | |
| Pop to new Lead | |
| Pop to Visualforce page | |
| Single-matching record: Pop detail page | Collapse |
| Obn't pop any screen | |
| • Pop detail page | |
| Pop to Visualforce page | |
| Multiple-matching records: Pop to search page | Collapse |
| O 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.

| - | | Q Search Sa | lesforce | | | ★ 🖬 ? 🕸 🖡 🙆 |
|-----------------|---|---------------|--------------------------------|-------------|------------------------|-------------------------|
| Sales | Home Opportunities 🗸 | Tasks 🗸 Files | Accounts 🗸 Contacts 🗸 | Campaigns 🗸 | Dashboards 🗸 Reports 🗸 | Chatter Groups 🗸 More 🔻 |
| 10 items - Last | UNTS ently Viewed – updated a few seconds ago | | | | | New Import |
| ACCO | UNT NAME | | PHONE | | ACCOUNT OWNER AL | LIAS |
| 1 Green | Dog Houses | | (631) 429-4880 | | TM1 | V |
| 2 Riley I | nc | | (360) 555-1003 | | TMartin2 | • |
| 3 Umbr | ella Corporation | | &+1 (488) 555-1000 | | jbenton | • |

- ✓ 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.

| Service Setup Home | \$ | setup Lightning Exper | ience App Mana | ger | | New Lightning A | op Nev | w Connected App |
|-----------------------|--------|--------------------------|-----------------------------|----------------------|-------------------|---------------------|-----------|-----------------|
| ADMINISTRATION | 20 ite | ms • Sorted by App Name | • Filtered by TabSet Type • | | | | | |
| > Users > Channels | | APP NAME 🕇 | DEVELOPER NA | DESCRIPTION | LAST MODIFIED | APP TYPE | VISIBLE I | N LIGH |
| AUTOMATION | 1 | App Launcher | AppLauncher | App Launcher tabs | 2/16/2014 10:33 P | Classic | ~ | |
| > Process Automation | 2 | Chatter Desktop | Chatter_Desktop | Chatter Desktop is a | 5/25/2016 5:02 PM | Connected (Managed) | | • |
| | 3 | Chatter Mobile for B | Chatter_for_BlackB | The Salesforce.com | 5/25/2016 5:02 PM | Connected (Managed) | | • |
| USER INTERFACE | 4 | Data Assessment | DataAssessment | Understand the co | 5/23/2016 6:04 AM | Classic | ~ | • |
| | 5 | Marketing | Marketing | Best-in-class on-de | 1/19/2007 7:24 AM | Classic | ~ | • |
| Action Link Templates | 6 | Platform | Platform | The fundamental Fo | 1/19/2007 7:24 AM | Classic | | • |
| App Manager | 7 | Sales | Sales | The world's most po | 1/19/2007 7:24 AM | Classic | | • |
| App Menu | 8 | Sales | LightningSales | Manage your sales | 3/21/2017 3:42 PM | Lightning | ~ | |
| Custom Labels | 9 | Sales Console | LightningSalesCons | (Lightning Experien | 1/13/2017 11:46 P | Lightning | ~ | Edit |



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

| Search Satisforce | Edit App | × |
|------------------------------------|--|------|
| APP DETAILS & BRANDING APP OPTIONS | UTILITY BAR SELECT ITEMS ASSIGN TO USER PROFILES | |
| Utility Bar Items | PROPERTIES Phone • Utility Item Properties • Label Phone To use an icon other than the default, enter the name of a Lightning Design System utility icon. For example, custom_apps. Icon call Panel Width 340 Panel Height 480 2 Load in background when app opens | |
| | | ie _ |

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.

| ShoreTel | for | Salesforce – | Quick | Start | Guide |
|----------|-----|--------------|-------|-------|-------|
|----------|-----|--------------|-------|-------|-------|



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=04t5000000LIrT

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=04t5000000LIrT

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





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:

| salesforce | earch Search | Alan Apps 🔻 | Help & Training Sales |
|--|---|-------------|---|
| Home Chatter Contacts A | ccounts Opportunities Reports Dashboards Products Cases | + | |
| Available | Alan Apps Tuesday January 31, 2017 | | |
| Last Call Subject Call Outbound 1/5/2017 Related To Account Suzzle Jones Comments One two three four five Result Product demo req Urgent | Post File Poll Share an update, @mention someone | Share | Recommendations More Nancy Staff Shares interest in 12 records Follow |
| Wy Calls Today | Soft By Most Recent Activity Soft By Most Recent Activity Alan Apps changed Status from On Hold to New. | ۲ | Shares interest in 6 records Follow |
| Announcement ShoreTel | Comment · Like · September 17, 2015 at 1:58 PM | × | Shares interest in 6 records Follow Joe Sky Shares interest in 6 records Follow |