

**USER GUIDE**

**SHORETEL FOR SALESFORCE USER GUIDE**  
ShoreTel Advanced Applications

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## Overview

This document describes the ShoreTel for Salesforce application.

This application appears in the user's web browser as a side bar or popup when they are viewing most Salesforce pages such as contacts or accounts. This user interface control is called the "softphone". It automatically tracks calls made and received by the user and associates those calls with Salesforce entities.

Although we call this utility a softphone, please note that it only provides call control and call logging functionality. You still need to have a voice path to your ShoreTel system such as an IP phone, an analog extension, extension assignment to your cell phone or home phone, ShoreTel Mobility, or the softphone feature in the ShoreTel Connect Client.

## Changes in Version 5.3

Version 5.3 introduces the following enhancements:

- Support for Salesforce Lightning
- No tab limit when using "Classic" pages
- Option to automatically save the Call Log (make an entry in Activity History) but keep the Call Log in edit mode after the call ends
- Option to keep the Call Log association(s) static
- Option to automatically create a new case when a call is received
- Option to pop record when call is answered instead of when the phone is ringing

## Changes in Version 5.2

The main change in this version is support of ShoreTel Connect.

## Changes in Version 5.1

This is the second major version of the ShoreTel Premise Phone System Salesforce Open CTI based integration. As detailed in the Release Notes, this version fixes a number of defects in the current 5.0 Softphone. In addition, it provides two levels of enhancements:

- Support for a number of new Call Center Settings.  
This requires the customer's Salesforce administrator install and configure the new 5.1 ShoreTel Call Center Definition settings and assign users to use the 5.1 Call Center Definition. See the Deployment Guide for details.

- Support for additional Call Note features.  
This requires the customer's Salesforce administrator install an optional ShoreTel provided Salesforce package containing several Apex classes required to support these features. See the Deployment Guide for details.

## Limitations

- Users are free to use either the Service Console or the Standard interface when using Salesforce.com pages in conjunction with the ShoreTel Softphone client. They should not however use both at the same time. If users have a need to open Standard browsers while mainly using the Service Console then the "Salesforce Service Console User (true/false)" settings should be set to "true" to prevent the softphone from operating in the Standard Console and causing problems.
- While users can use Internet Explorer Version 11, due to a defect in version 11 users should avoid accessing Salesforce from more than one browser windows. If multiple Internet Explorer version 11 browsers are showing the ShoreTel softphone, then each browser will respond to calls and will not coordinate with each other. The result is that each browser will lookup callers independently and each browser will potentially save a call activity record for each call handled. This defect is explained here:

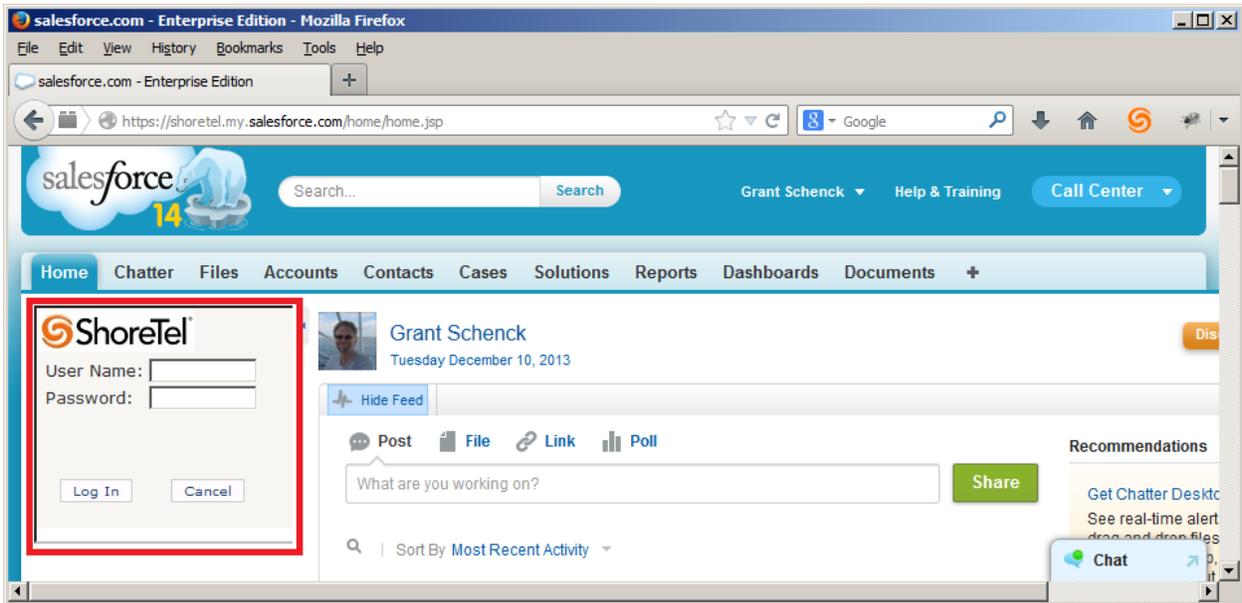
*The Microsoft Internet Explorer product team is aware of this issue and it is under active investigation. Unfortunately, we cannot comment on the fixes and the timelines at the moment. I hope you have already clicked on the "I can too" link at <https://connect.microsoft.com/IE/feedback/details/811546/ie11-localstorage-events-fire-twice-or-not-at-all-in-iframes>. This will help us in assessing the impact of the issue and determine how widespread it is.*

## Usage

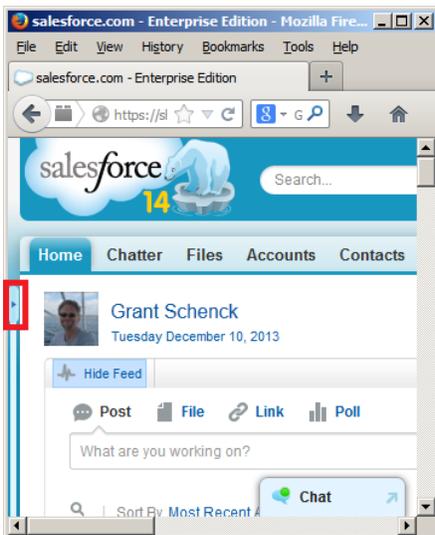
The following section describes the procedure to log into the ShoreTel softphone.

### Login

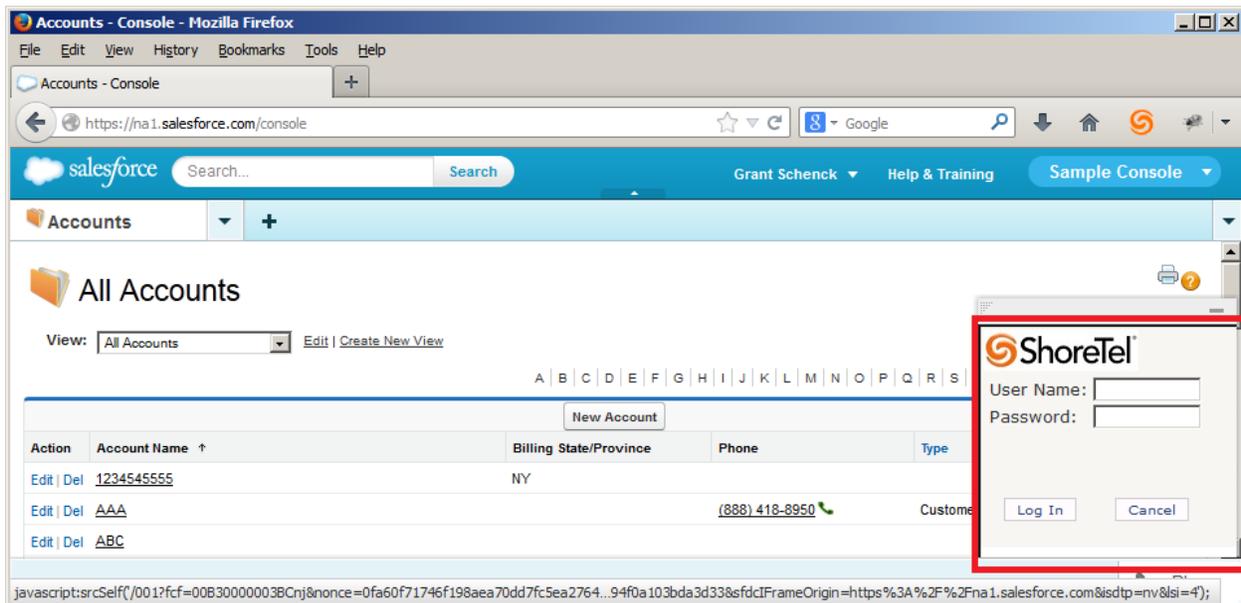
After users successfully log into Salesforce, users that have been configured to use the ShoreTel for Salesforce Application will see the softphone login webpage should automatically appears on the Salesforce sales console, as in the screenshot below, to prompt them to log into ShoreTel. The "Use Domain Credentials" option allows you to login without entering your username/password if your ShoreTel account is configured to use domain credentials and you are logged into the domain.



If the sidebar isn't showing in the Salesforce Sales Console, click the small divider button:



For the Salesforce service console, the login page appears at the lower right corner of the screen.

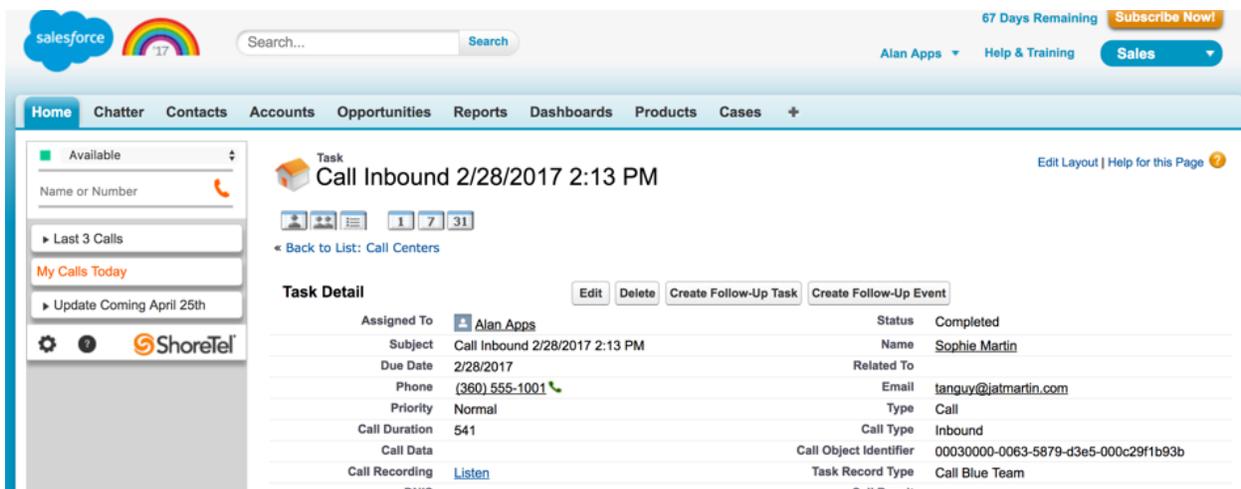


The credentials supplied are the same credentials the user uses to log into ShoreTel Connect Client. A successful ShoreTel login associates the users with their specific phone extensions and allows them to manage calls on the softphones.

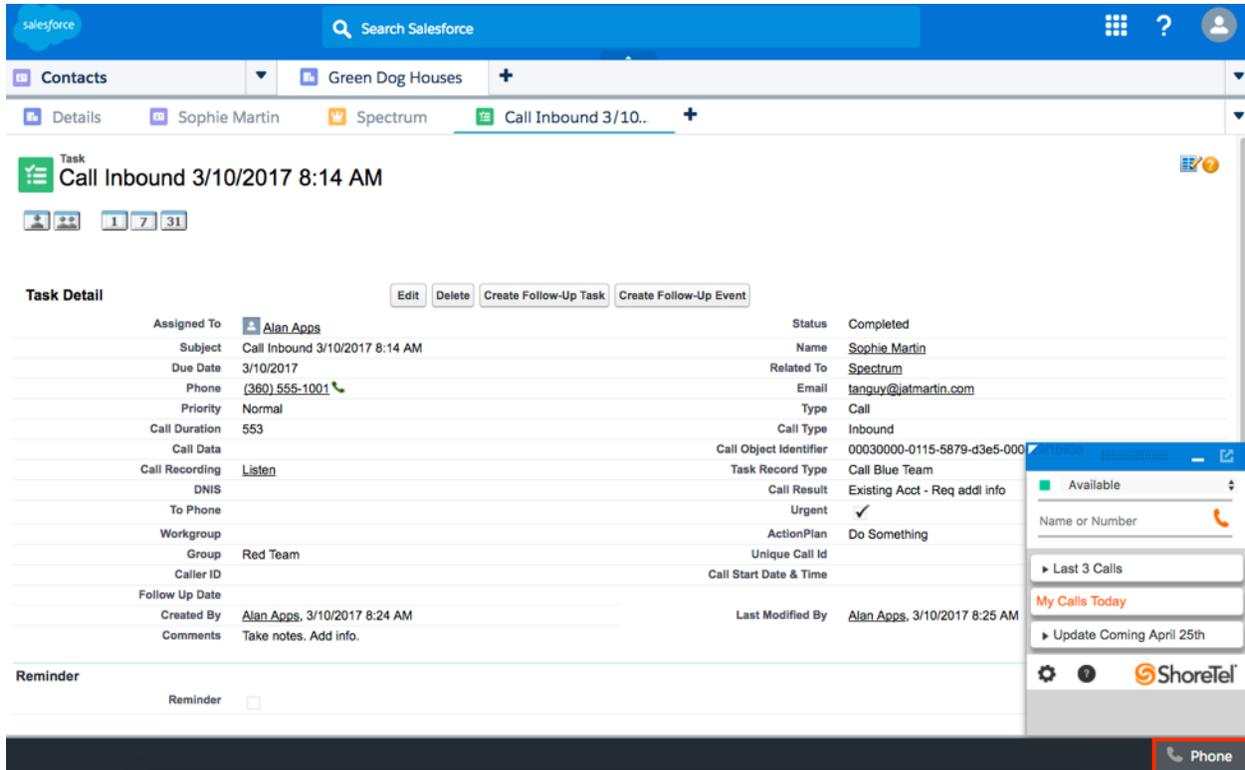
There are two ways to login, one with the ShoreTel AD (active directory) credentials for ShoreTel AD users, and the other with just the ShoreTel user credentials for ShoreTel non-AD users.

For ShoreTel AD users, the users' AD names are used for the login. After ShoreTel AD users enter their AD names and click at Log In, depending on the browser configuration, ShoreTel AD users might get a second prompt to enter their AD names and passwords for authentication, as below:

After the successful ShoreTel login, ShoreTel Softphone will appear on the left side of the screen of the Salesforce Sales Console as below.



For the Salesforce Service Console, a phone icon will appear at the lower right corner of the screen. Users may need to click at the phone icon to open the softphone as configured in Call Center Definition. Clicking at the phone icon shows or closes the ShoreTel softphone as a toggle.

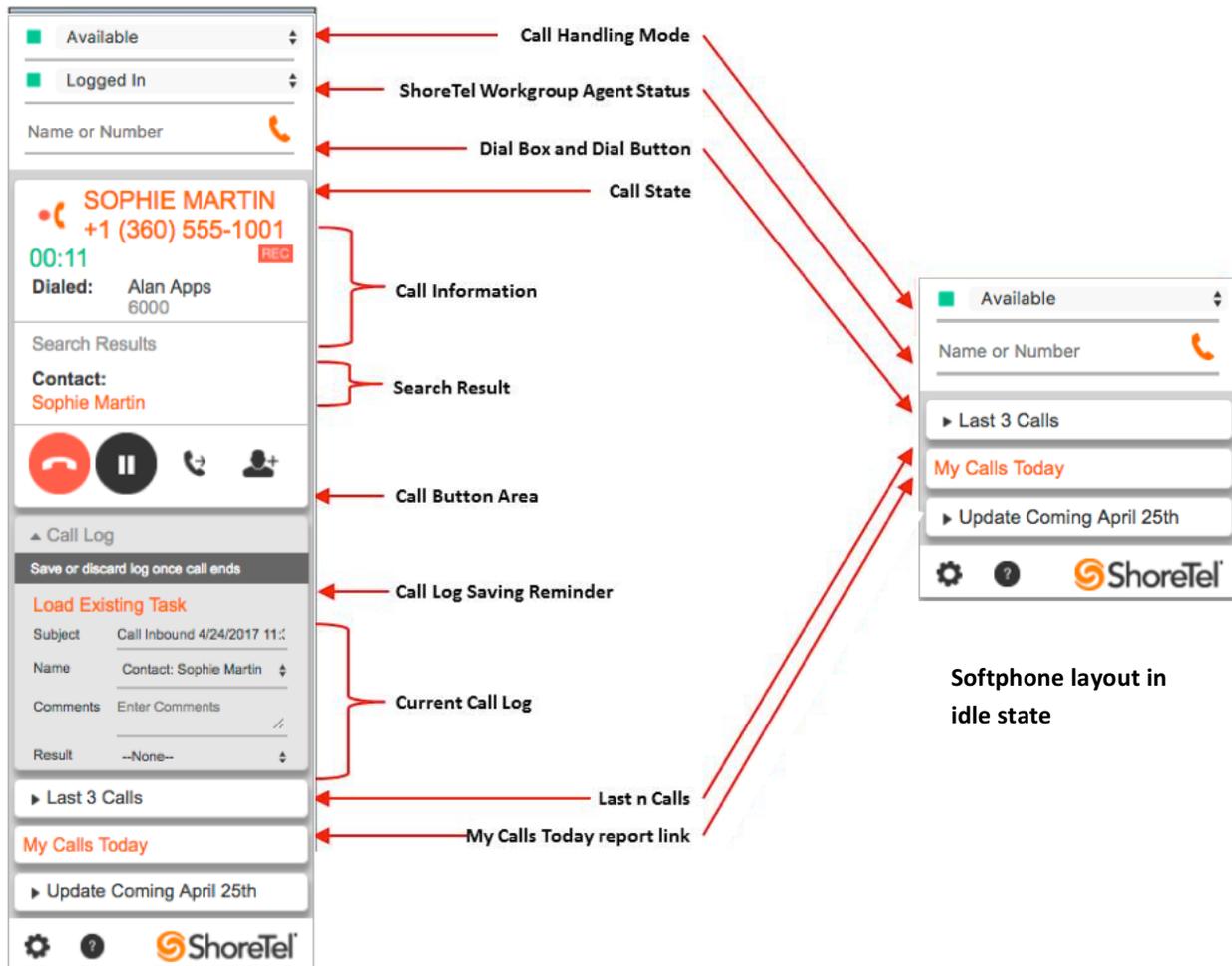


After a successful ShoreTel login, if the user's ShoreTel extension is offline, a red error message, for example, "Phone 212 is offline" is displayed on the Softphone. The error display will be on till the problem is resolved.

For other errors, refer to ShoreTel for Salesforce application FAQ for troubleshooting tips and solutions.

## Exploring the Softphone Layout and Features

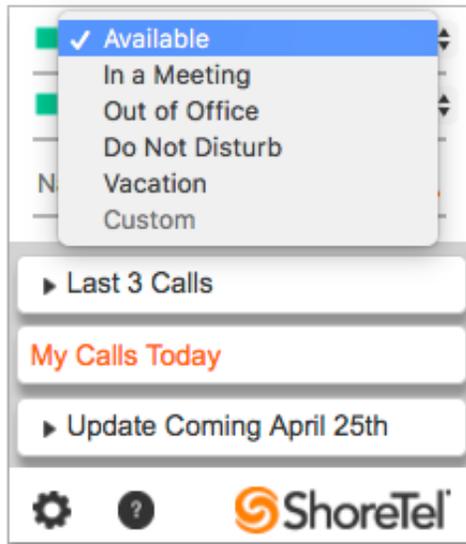
The SoftPhone has a number of sections which provide information and controls to allow users to interact with ShoreTel calls and Salesforce and the relation between the two. The basis of the softphone layout is defined by the Call Center Definition, and the Softphone Layout settings that the user is assigned to. The layout dynamically changes with various call states. The examples below show the typical layouts of two Softphones for ShoreTel Workgroup agents, one with an active call and the other in the idle state. Administrators can modify SoftPhone Layout settings or create additional Softphone Layout and assign different users to use different SoftPhone Layouts.



**Softphone layout with an active call**

### Availability State (formerly Call Handling Mode)

The Availability State identifies the user’s real-time call handling status and how inbound calls are to be handled in those statuses, as configured in the ShoreTel Connect Client. Users can manually update their Availability State on the Salesforce softphone and the new setting will be automatically updated on their ShoreTel Connect Client and IP phones. ShoreTel provides 5 Availability States to identify the manner that your calls are handled as shown in the drop-down menu below. Refer to ShoreTel Connect Client User Guide for your machine for details on the Availability States and how to configure different call handlings. Note that the ShoreTel for Salesforce integration does not currently support the “Custom” Availability State.



### ShoreTel Workgroup agent status

This control is only available for ShoreTel Workgroup agents. It displays the agent's current Workgroup status and allows it to be changed by selecting a new status from the drop down list.

**Note:** If the user is not a ShoreTel Workgroup agent then the Workgroup agent status will not appear in the user's Softphone regardless if the Show the ShoreTel Workgroup Agent Control in Call Center Definition is set to True or not. This control does not support Enterprise Contact Center (ECC) agents.

The agent status shows one of four statuses:

1. **Not Ready for Call**  
The agent does not want to receive any workgroup calls. Note that this only applies to workgroup calls. Direct dialed, transferred, or auto attendant calls will ignore this setting. This corresponds to a "Logged Out" status in the ShoreTel Connect Client.
2. **Ready for Call**  
The agent is ready to accept workgroup calls and does not have any calls active. This corresponds to a "Logged In" status in the ShoreTel Connect Client when no call is active.
3. **On a Call**  
Agent was ready for calls but is currently active on a call. Moving in or out of this state can only be done by ShoreTel system. This corresponds to the "Logged In" status in the ShoreTel Connect Client when a call is active.
4. **Wrap Up**  
The agent completed a workgroup call and is in Wrap Up. This corresponds to the "Call Wrap-Up" status in the ShoreTel Connect Client.

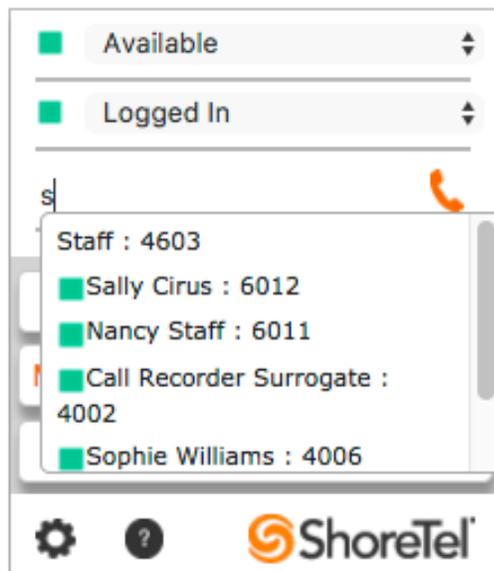
The Agent Status both shows the current agent status and allows the user to change his status. Specifically:

- From any state, the agent can change their state to "Not Ready for Call" to prevent future workgroup calls. This might be used before taking a break.
- Similarly, assuming the user is running ShoreTel Version 8.1 or later then, from any state, the agent can change their state to "Wrap Up" to prevent workgroup calls while they perhaps complete paper work.
- From "Wrap Up", the agent can change their state to "Ready for Call" if they conclude their wrap up early before the automatic timeout. Please note that call log will not be automatically saved until the agent leaves the "Wrap Up" state.
- From "Not Ready for Call", the agent can change their state to "Ready for Call" to start accepting workgroup calls.

### Dial Box and Dial Button

Dial box and dial button appear in Softphone in idle or active call state. Dialing in the idle state will make the first outbound call; dialing from the active call state will first put the active call on hold before making the outbound call. The sections below describe the function for both scenarios.

To make an outbound call, start typing a name or number in the Dial Box from your keyboard. During the typing, Softphone will offer rapid access to ShoreTel directories and Outlook contacts to search for matching names or numbers and dynamically display the first 10 items with their voice call presence icons in the dropdown menu. Select the contact and click Dial button to make the call. The dropdown menu is based on the QuickDialer feature in ShoreTel Connect Client which searches in ShoreTel directories and Outlook contacts only. Refer to ShoreTel Connect Client User Guide for your device for details on QuickDialer feature.



### Phone Line Header

Phone line header shows the status of the phone line. A status icon changes color and blinks, and provide text description of the call state or line status. Some of the basic Call states include:

- Proceeding: For outbound call setup
- Offering: For inbound call setup
- Connected: For stable call state
- OnHold: For call on hold

### Call information

This shows data related to the call, such as the phone number the customer used to dial, the duration of the call, and links to any record associated with the call. Administrators can configure the data display in this area via call center definition.

### Search Result

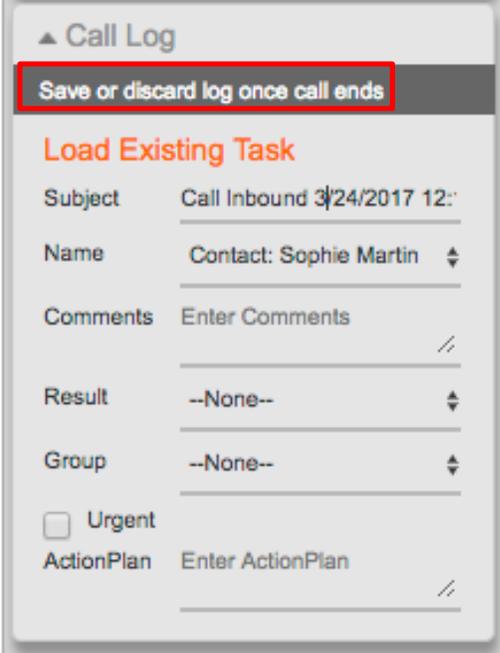
This displays the links of the Salesforce entities resulted from the search based on the caller's phone number (ANI) or called number (DNIS) in Salesforce. For outbound call made by click-to-dial, it displays "Clicked to Dial" and the link of the contact dialed. Administrators can configure the data display in this area via softphone layout configuration.

### Call button area

This shows buttons that let you make call commands, such as dialing, hanging up, putting call on hold, transferring, conferencing, and retrieving call from hold.

### Current Call Log

When the user is connected on an external call, the current call log window automatically expands to allow the user to type in call notes related to the call. The Call Log reminder message shows how the call log is to be saved as configured in the Call Center Definition. Please note, for ShoreTel workgroup agent, the call log will not be automatically saved until the agent leaves the wrap-up state.



▲ Call Log

Save or discard log once call ends

**Load Existing Task**

Subject Call Inbound 3/24/2017 12:

Name Contact: Sophie Martin

Comments Enter Comments

Result --None--

Group --None--

Urgent

ActionPlan Enter ActionPlan

The call log Subject line will default to the date and time of the call but can be changed if desired. In addition, the Name field can be set automatically by a “hit” on a call’s phone number or by the user navigating to a specific Salesforce entity while on the call. Comments box is for entering call notes. Result field features a dropdown menu of pre-defined call results for selection.

### Last n calls display

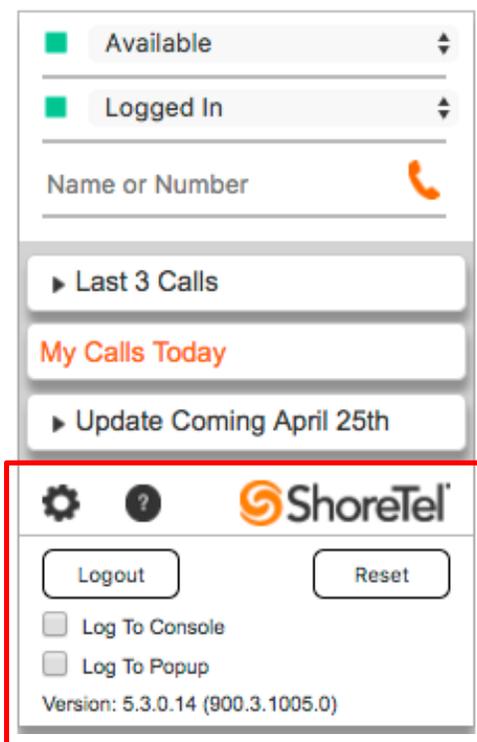
Expanding this area will display details of up to the last n calls handled by this user. It displays the same information as seen in Current Call Log while the call was active. The number of calls can be set from 0 to 10, in the Call Center Definition.

### My Calls Today report link

Clicking this link opens the Salesforce Report tab to create My Calls Today report.

### ShoreTel logo and Softphone Tools

This displays the ShoreTel logo and the softphone tools icon. Clicking at the tools icon opens the softphone tools menu as below and toggling the tools icon closes the tools menu.



**Logout:** Logs out of ShoreTel softphone so administrator can quickly login to test another user. Both Log To Console and Log To Popup settings remain.

**Reset:** Logs out of ShoreTel softphone and clears both Log To Console and Log To Popup settings.

**Log To Console:** Enabling this will cause logging to the browsers built in console. Most browsers support some kind of debugging console (see your browsers documentation) and if this option is enabled then the application will output logging to the built in console.

**Log To Popup:** Checking this setting starts the softphone logging in a separate log4javascript pop-up window with default logging settings. Users can customize the log view in the pop-up window, or clear the logging entries by clicking at the Clear button in the log4javascript window. Cleared log is not retrievable. As long as this setting is checked, any softphone activity will trigger log4javascript entries. To stop logging, uncheck Log to Popup and close the log4javascript window. All logging will remain saved until the Clear button is clicked.

**Version:** Displays the ShoreTel for Salesforce application version number. Clicking on the version label will open the ShoreTel for Salesforce application's release notes. This is a PDF file so you'll need the Adobe reader application.

## Using the SoftPhone

The SoftPhone allows ShoreTel Salesforce users to:

1. Make a phone call by dialing a number in the SoftPhone, choosing a number in an online directory, or clicking a phone number in any contact, lead, activity, or account
2. Answer a phone call by clicking Answer when a call arrives or using your telephone to answer the call.
3. Quickly view all Salesforce records that are related to the call, such as contacts, cases, or accounts
4. Transfer a phone call by clicking the Transfer button while on a call. The original call is placed on hold and the user dials to a third party. Once connected, click Complete Transfer to transfer the original party to the third party.
5. Put a caller on hold by clicking the Hold button while on a call. The user can retrieve the call by clicking Retrieve from Hold.
6. Initiate a conference call by clicking the Conference button while on a call. The original call is placed on hold while the user dials the new participant. Once connected, click Complete Conference to place all parties on the same line.
7. Start a new call on an additional line by dialing the number while on a call.
8. Attach comments to an automatic call log by typing text into the Comments text box during a call.
9. Associate Salesforce records with a call by navigating to the record in the main Salesforce window and then selecting it in the call log area.
10. Edit completed call logs by clicking Edit next to the call in the Last Calls area of the SoftPhone.

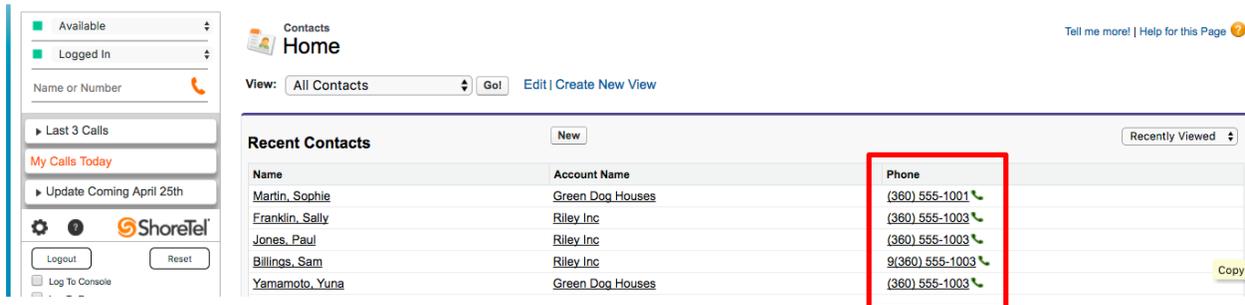
### Making a phone call

Users can make an outbound call in several ways with Softphone, one such common way is Click-to-Dial.

With the ShoreTel Softphone up and running, the Click-to-Dial function is enabled with a green handset button to the right of each clickable number as shown below. Users can click the green handset button

to make calls directly from any Salesforce entity, such as Contact, Lead, Activity or Account, in a list or as individual entity, anywhere on Salesforce.

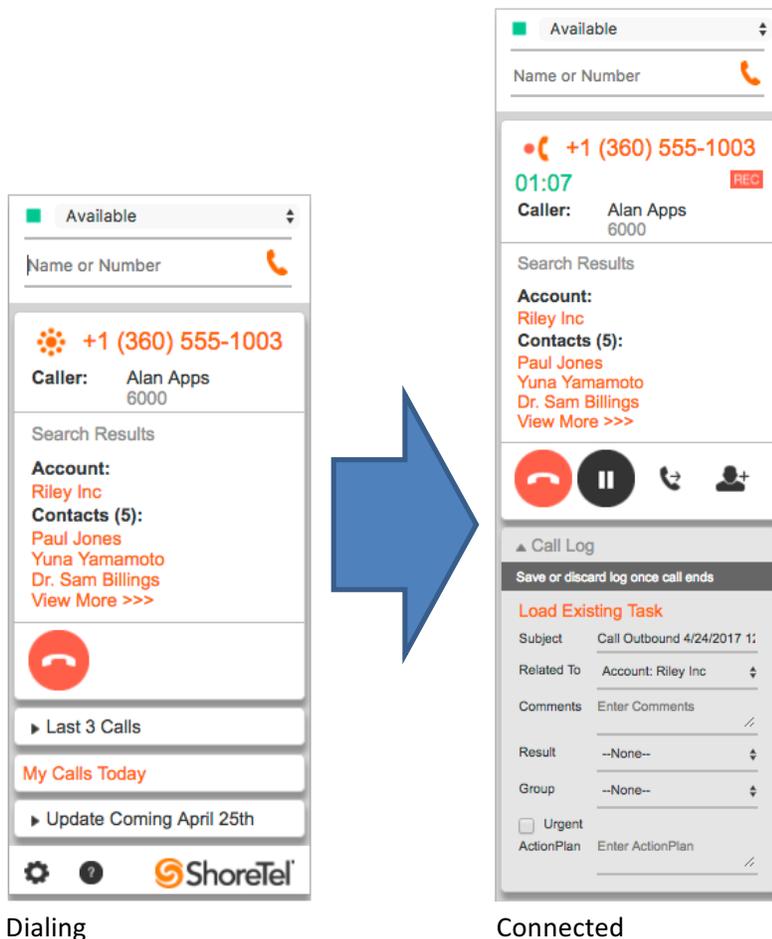
Click-to-Dial works for external and internal outbound calls, but cannot be repeated on the same number within 5 seconds after the previous call. And the green handset button will not appear next to numbers saved as fax numbers.



QuickDialer in the Dial Box is another efficient way for making phone calls. Users can start typing in the numbers or names and select the right party with his or her real-time voice call presence status in the QuickDialer dropdown menu to dial out, as described in Usage | Exploring Softphone Layout and Features | Dial Box and Dial Button session above.

Or, the user can enter the complete new number in Dial Box and make the call, like in the cold call scenarios.

With the common practice and configuration, when the number is dialed and during the call setup, Softphone displays the Dialed number, the caller/user information, and the search result(s) on the Dialed number from searching into the Salesforce database. Softphone displays all matching search results, if configured in the Softphone Layout, such as Contact(s) and Account. When the call connects, call Duration gets started, Call Buttons are offered, and the Call Log opens with automatic association that the softphone can resolve. Softphone does not display or log association if ambiguity exists, as the multiple contacts scenario in the screenshot below. The user needs to resolve the ambiguity and manually associates a contact to the call log by either directly updating it in the call log or by clicking at the contact link on the softphone or navigating the Salesforce to display the contact entity. Users can also start entering call notes in the Comments box or update any Softphone data field before or after the call gets answered by the far end customer.



Dialing

Connected

To provide better customer service and service continuity, users can click at links on the Softphone or in Salesforce window to navigate through the Salesforce database for customer information or business data previously saved in Salesforce entity such as Contact, Lead, Solution, or call notes which is saved as Comments in Activity History call records. This combined voice and data capabilities all in one application is one of the most powerful features provided by the softphone.

Furthermore, to collaborate with other agent or external party, users can invoke the call transfer or conference call features, as described in the Put the Call on Hold, Transfer a Call, and Conference a call sections below, to start leveraging teamwork or getting consultation for the customer.

All the while with the call log open, users can enter and update data in the Call Log. To keep an effective call log, users can edit the default Subject line according to their business practice, and update Name and Related To entity to associate the call log to the most relevant entities. Proper call log association facilitates efficient search and review in the future. Please note call log displays call information fields with proper and unique values only. Data field with ambiguity will not be displayed even configured in the Call Center Definition. As the Dialed number being shared by multiple contacts in the scenario above, no Name field is displayed on Softphone. Users can click at any Contact link on the Softphone or

in Salesforce to resolve the call log association by displaying the Contact Details in Salesforce window. With the update, Softphone displays the Name field as in the screenshot below. Please note if one of the multiple matching contacts has already been displayed in Salesforce window during call setup, the call log will be automatically associated with the displayed contact before and after the call is answered, and the Name field will be displayed in the softphone.

The Contact or Account entity displayed in Salesforce window will automatically update the Name or Related To selection on the Softphone, but not vice versa from the call log association update to Salesforce window display. Upon call disconnect or when the Call Log is manually saved, the selections in the Call Log on the Softphone determine the final call log association, not the Salesforce display.

At the end of the calls, users should use the Call Result dropdown menu and select the proper pre-defined Results to provide a quick summary of the calls. Call Result is a searchable and sortable call data field used in Salesforce reports and dashboards.

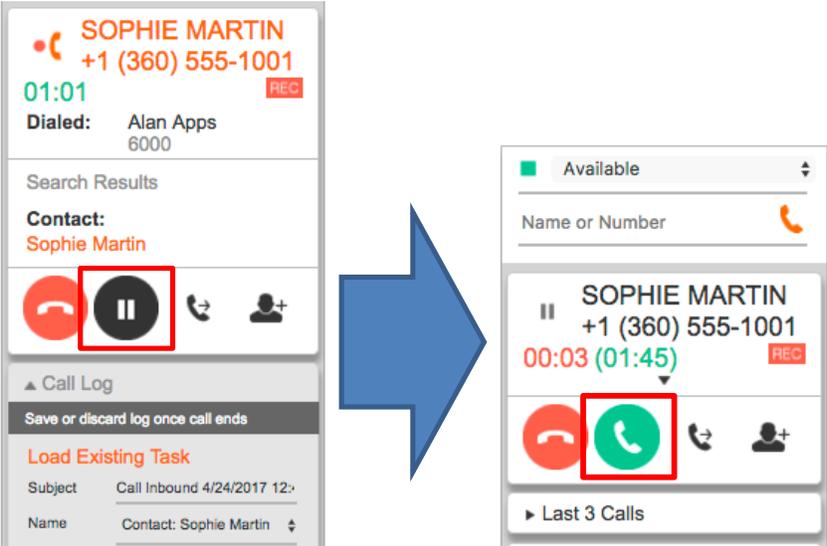
The screenshot displays the ShoreTel softphone interface on the left and a Salesforce contact detail window on the right. In the softphone interface, a call log entry for 'SOPHIE MARTIN' is shown with a duration of 01:01 and a recording status. Below this, search results for 'Sophie Martin' are visible. A dropdown menu for 'Result' is open, showing options like 'New Lead - Req Proposal' and 'New Lead - Placed order'. The Salesforce window shows the contact details for 'Sophie Martin', including the account name 'Green Dog Houses' and the contact owner 'Alan Apps'. A red box highlights the 'Contact: Sophie Martin' field in the softphone search results, and another red box highlights the 'Result' dropdown menu.

Please note if the Softphone Layout is configured to screen pop to New Browser window or tab, clicking at any link will open new browser window or tab for the new display. Each new browser window and tab will include a copy of the Softphone URL. Opening too many new windows or tabs could slow down or even stall the Softphone display and function except the telephony function which should stay intact

and not affecting the phone calls. But some updates on various Softphone copies, such as call notes and Call Log association could be lost.

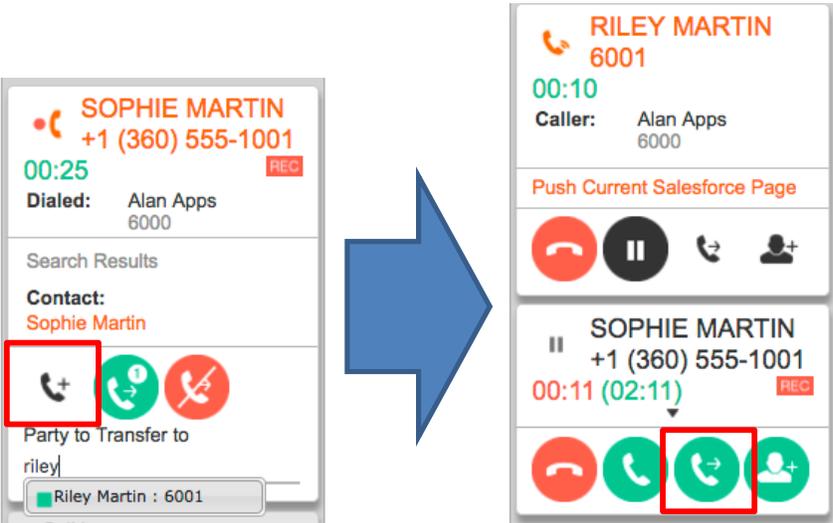
**Putting a call on hold**

During an active call, users can click at the Hold button and put the call on hold and click at the Retrieve From Hold button to resume the call.



**Transferring a phone call**

Users can transfer calls internally or externally by clicking at **Transfer** ➤ enter phone number under ‘Enter party to transfer to...’ with QuickDialer, and clicking **Initiate Transfer** to set up the new call as below, or from the call hold scenario described in Putting a call on hold section above. Then click **Complete Transfer** on the held call to complete the transfer. QuickDialer feature with the voice call presence icon allows transferring agent to ensure the availability of the other agent before call transfer.

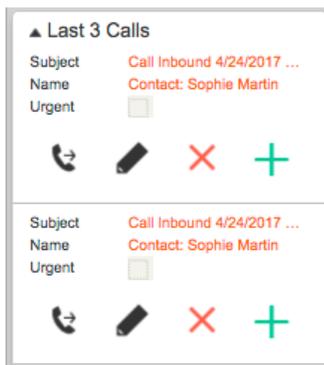


With the transfer ShoreTel Call properties, for example the associated contact and its objects, i.e., account in the Related to field of the first call will also be transferred to the destination party. This capability enables the business operation in which the frontline agent greets and identifies or confirms the caller through communication, and manually associates the contact to the call log if needed, before transfers the call and the call log with the contact and the Related to field to the next agent for specific call handling and customer service.

Technically all ShoreTel call properties can be included when transferring calls to system extension or other applications to provide automatic, custom call handling solutions based on the transferred call properties. Refer to Appendix A Application Integration Features for details on ShoreTel Call Properties.

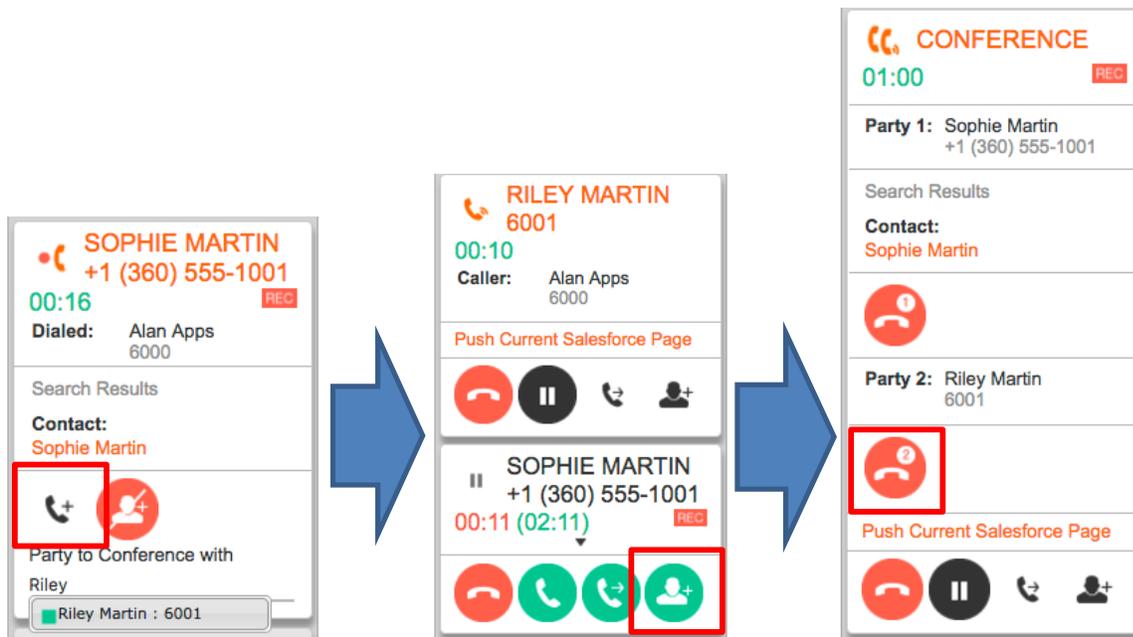
Upon transfer, users should use the Call Result dropdown menu and select the proper pre-defined Results to provide a quick summary of the calls. Call Result is a searchable and sortable call data filed used in Salesforce reports and dashboards.

After transfer, both Call Logs are automatically saved, if so configured, with all call notes and call associations on Softphone as two separate call logs.



### Initiate a conference call

Users can collaborate with an internal or an external party during an active call by clicking at **Conference** ➤ enters phone number under 'Enter party to conference with ...' with QuickDialer, then click ➤ **Initiate Conference**, as below, or by the call hold scenario described in Putting a call on hold section to put the existing call on hold and set up the new call.



Then click at ➤ **Complete Conference**, to set up the 3-party conference call as below with either one existing call Comments box or two existing call Comment boxes.

Users can manage the conference call on the Softphone similarly to a two-way call except the extra Drop Party button to drop either call party. Each conference can include more than 3 parties.

### Answering an external inbound call

When an external incoming call arrives, with the common practice and configuration, the Caller and the Dialed information is displayed, Duration starts, and the search into Salesforce database with the caller ID is performed with search result displayed on the Softphone. There can be three types of search results for external incoming call's caller ID:

- Single matching contact
- No matching contact
- Multiple matching contacts

For unique Contact entity in SalesForce database, the caller's Contact Detail is popped into Salesforce window as the in screenshot below. This feature is optional and must be enabled by the administrator in the Softphone Layout settings.