

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

Screen pop method: Uri link

### 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 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"

When 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.

## 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 “CloudCTI CTD Adapter” AppExchange package from the web. You can download the package from this url:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tG0000000YKyP>

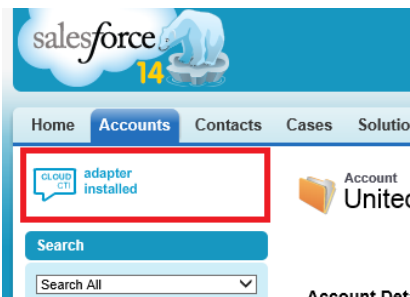
Finally, add your user to the Call Center (see

[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	
<a href="#">Manage Call Center Users</a>	
<a href="#">Call Center Users Help</a>	
Call Center Users by Profile	
System Administrator	1
<b>Total</b>	<b>1</b>

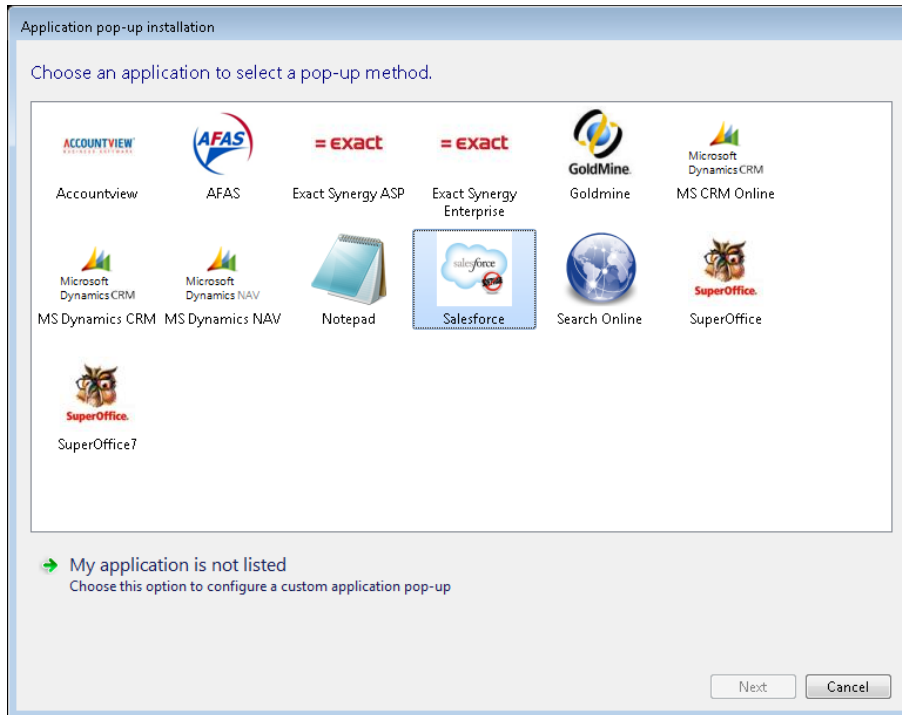
After successful installation you will see the “CloudCTI adapter installed” logo in the upper-left corner of the “Accounts” tab. Phone numbers will be highlighted as hyperlinks.



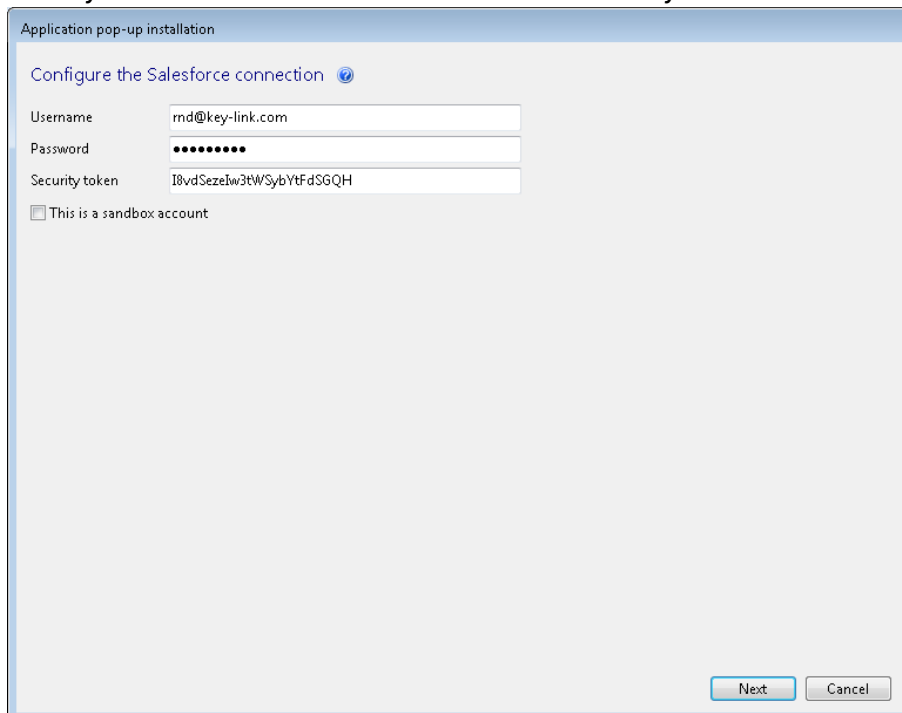
Phone	<a href="tel:+441914956203">+44 191 4956203</a>
Home Phone	
Mobile	<a href="tel:+441913456234">+44 191 3456234</a>
Other Phone	
Fax	+44 191 4956620

## Configuration steps

- 1) Start by clicking 'add recognition' in the [Recognition Configuration Tool](#) (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'Salesforce, as shown below.



- 2) Enter your Salesforce user credentials and security token.



3) Check the configuration summary and click finish to add the recognition from Salesforce

