

# Horizon Salesforce (Lightning) Adaptor Add-in Guide

NOTE: Salesforce Adapter is not supported on Terminal Service environments at present.

## Pre-Requisites

Access to an Administrator account for Salesforce

The Horizon Integrator Client (version 3.0.12.18122 or higher) installed and started

Horizon Integrator Client CRM license

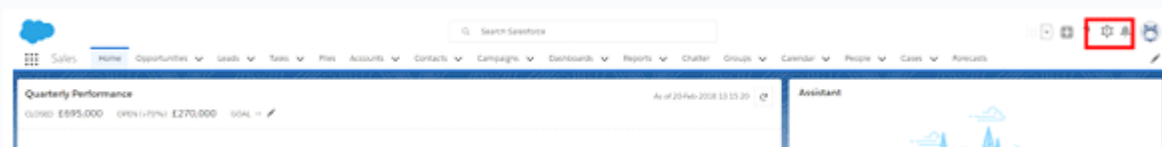
## Step 1: Download the Adapter's Definition

Go to the following link to download and save the adapter's XML definition file:

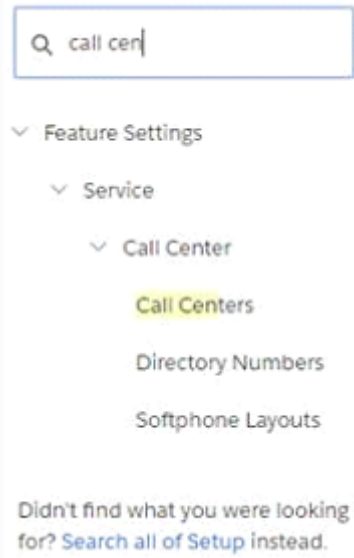
[Download Horizon Integrator Salesforce Adapter.](#)

## Step 2: Import the Adapter Definition

Log in to Salesforce as an administrator, click on the cog and then select 'set up'

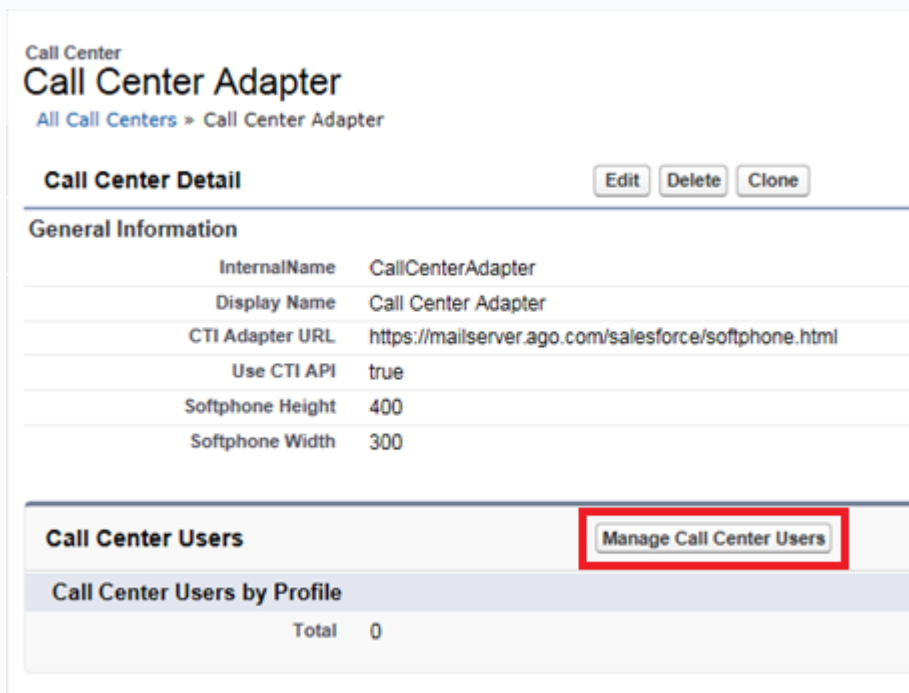


This will reveal the setup menus.

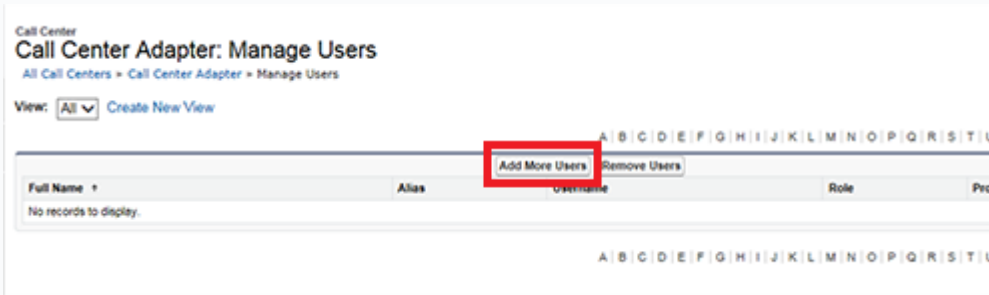


Search for 'Call Centers'. Once on this page, press 'import', locate the adapter XML definition file, and press 'import' again.

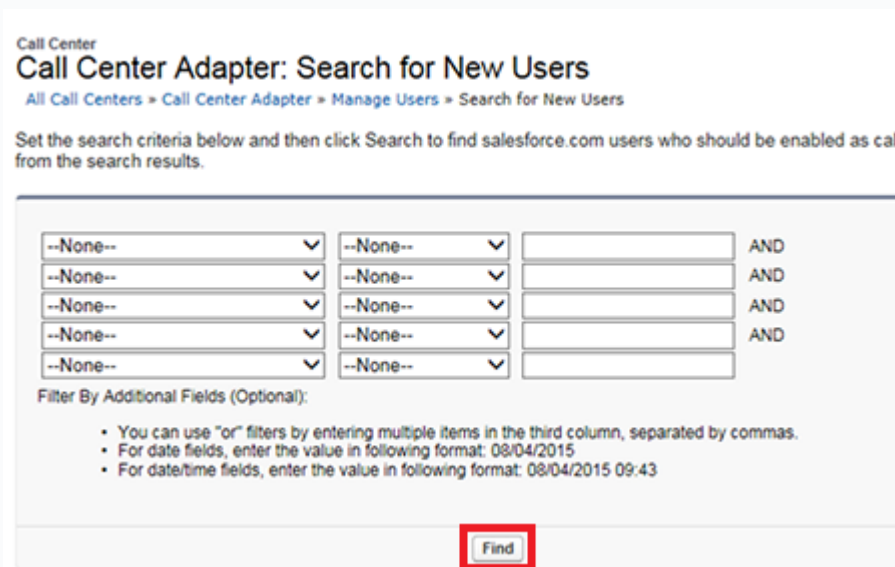
### Step 3: Manage Call Center Users



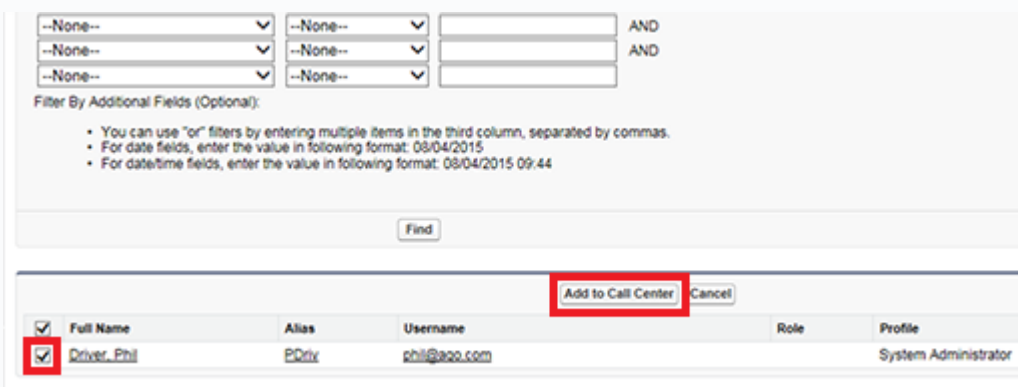
Once you have completed the import, you will be automatically taken to the Horizon Integrator Call Center Adapter screen shown here. Click on the 'Manage Call Center Users' button.



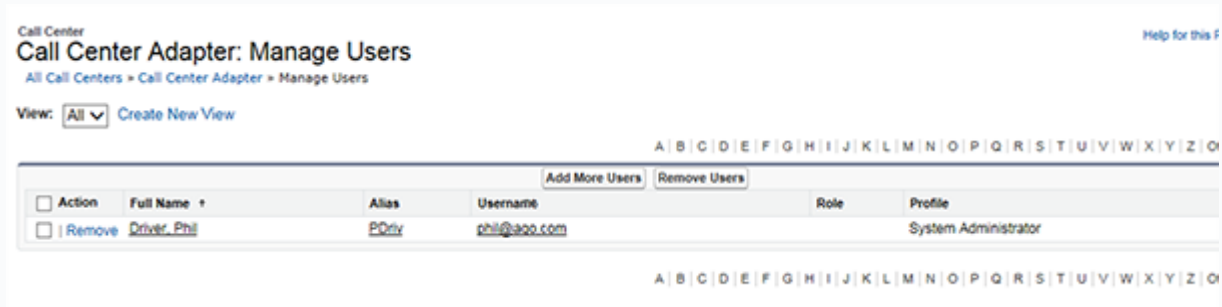
In the Manage Users screen, click the 'Add More Users' button to start adding users that you want to have access to the Adapter.



Use the search filters to locate the user(s) that you wish to add, or just leave the filters set to none, and then click the 'Find' button.

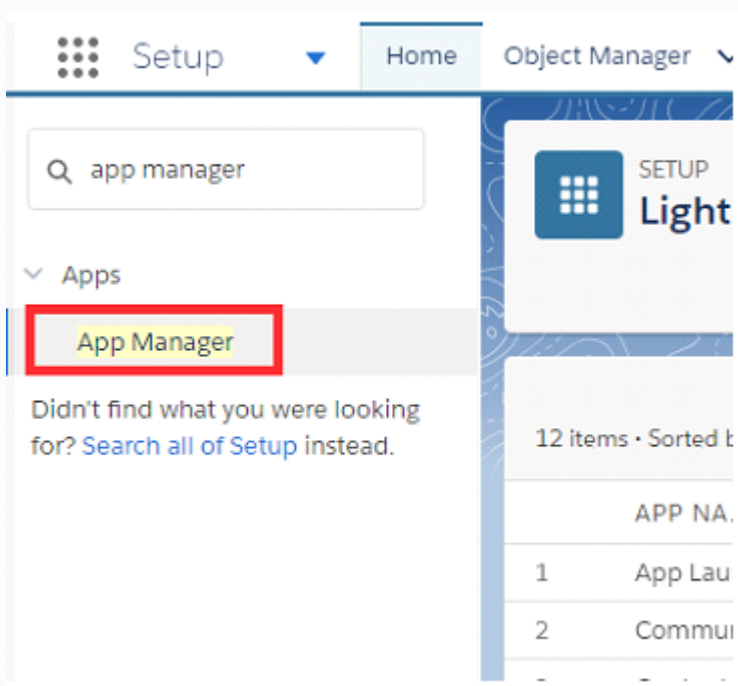


This will reveal your filtered list of users. As shown below, tick the user(s) that you want to add, and then click the 'Add to Call Center' button.



When you return to the Manage Users screen, you'll see your selected users listed.

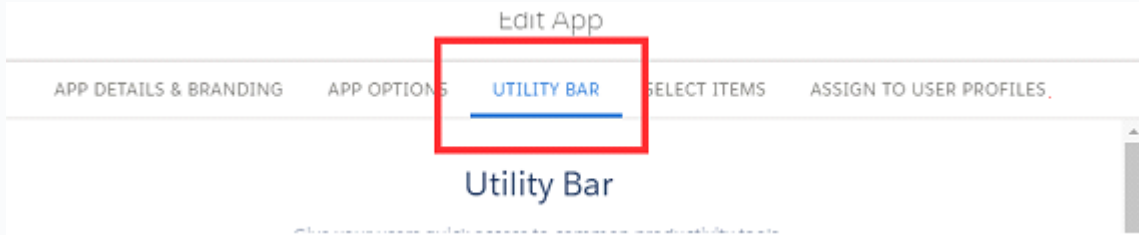
## Step 4: App Manager



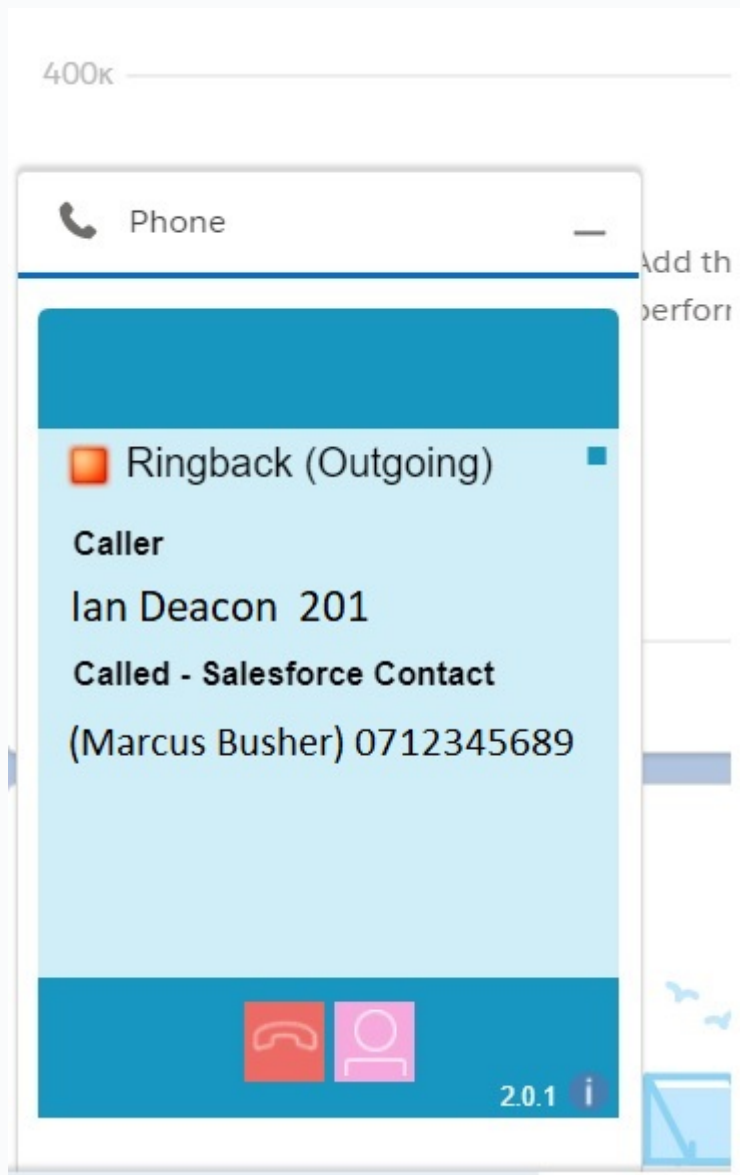
Next, search in the 'quick find' box again, this time, for 'App Manager'

5	Platform	Platform	Line tuneame...	23/01/2018 ...	Classic	
6	Sales	Sales	The world's ...	23/01/2018 ...	Classic	
7	Sales	LightningSales	Manage your ...	23/01/2018 ...	Lightning	✓
8	Sales Console	LightningSale...	(Lightning Ex...	23/01/2018 ...	Lightning	Edit
9	Salesforce Ch...	Chatter	The Salesforc...	23/01/2018 ...	Classic	Edit
10	Service	Service	Manage cust...	23/01/2018 ...	Classic	
11	Service Cons...	LightningServ...	(Lightning Ex...	23/01/2018 ...	Lightning	

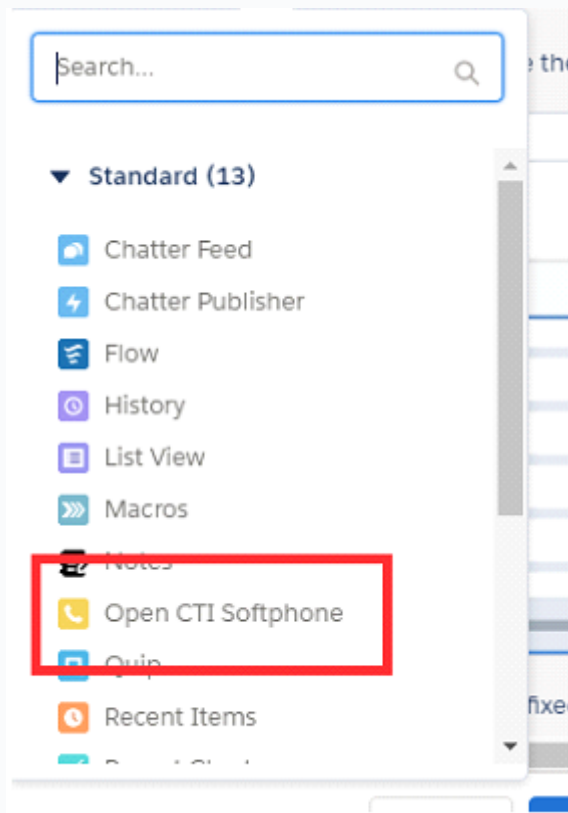
A list of applications will appear. Select an application that has an app type of 'Lightning'. Press the drop-down menu and then 'edit'.



Select 'Utility Bar' from the 'edit app' form that appears.



Select "add" and choose "Open CTI Softphone" from the drop-down.



The panel width/height is set automatically but can be changed if required. to do this, edit the details under the CTI Softphone form. Once you are happy with the options, press 'save'.

**IMPORTANT:**

Visibility is configured per Salesforce App - ie. you need to add it to each App that you want it to be accessible in.

Ensure the user is assigned the Lightning Center Adapter, otherwise it will not be displayed in their utility bar.

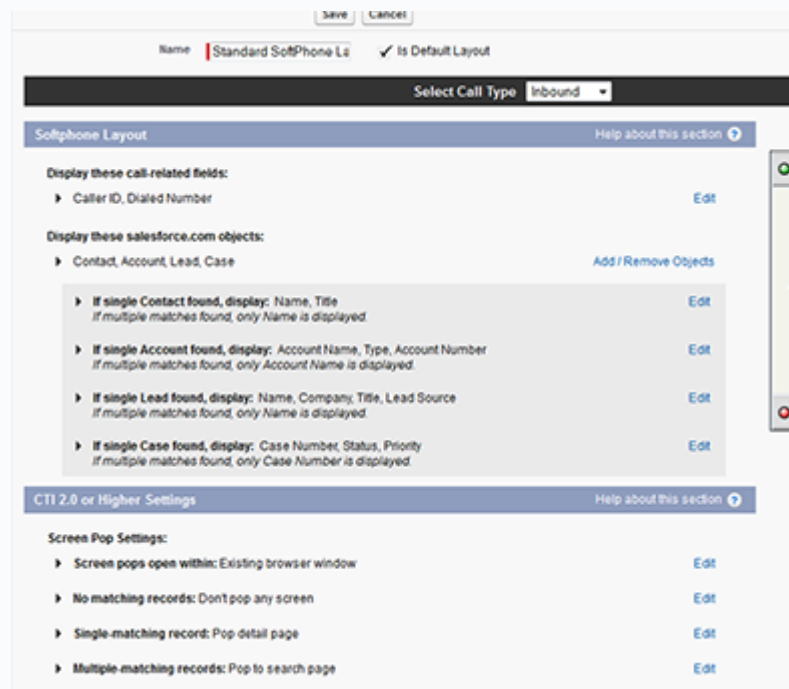
You may need to refresh the page for it to show - i.e. Ctrl F5

## Panel Status

If the user has Horizon Integrator running and a valid CRM level license, their Softphone State will show as 'Available' and they are ready to work with the Softphone.

If the user is experiencing connection issues, or their Horizon Integrator client does not support the Salesforce integration, their state will show as 'Not connected'. See the troubleshooting section for help.

## Configuring Multiple Search Results Feature



To allow the multiple searching to work the admin must enable a setting as follows (see screenshot).

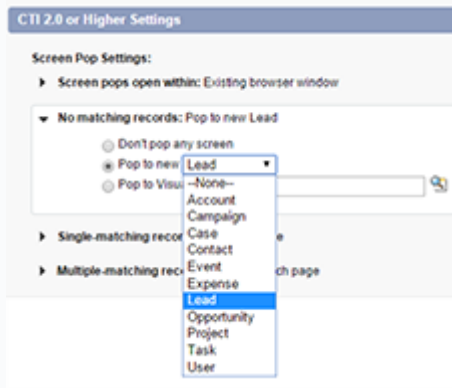
Go to Customize - Call Centers - Softphone Layouts

Edit the Standard Softphone Layout

In the section 'Screen Pop Settings - Multiple-Matching records', press edit

Select the option "Pop to search page"

## Customise "New" Entity



If this setting is not configured, then the “+” button will create a new lead. If not configured it is either “No matching records” is set to “Don’t pop any screen” or “Pop to New ‘-None-’”.

Customising the behaviour of the “+” button can be done by selecting another entity in the list.

Note: Different Softphone Layouts can be created and assigned for each user allowing customising of the behaviour for each user. This is not covered here in this guide.

## Troubleshooting

If the status on the Softphone panel shows as “Not Connected”, check the following:

Check that the user has their Horizon Integrator client running and connected to their host account

Please check that your client meets the prerequisite version for Salesforce Adapter

Check that the user has a valid CRM license assigned to them and that they have “CRM” selected as the License Type in their client configuration

If the Softphone panel does not appear for a user:

Check that the user is assigned to use the Horizon Integrator Salesforce Adapter (they should be listed in the Manage Users page shown in Step 3 above)

If multiple contacts are found and the search button does not work:

You should check the section “Configuring Multiple Search Results Feature” above

## Optional Configuration

# Include the Users Time Zone in the Call History Subject

Install this Salesforce Apex class in order to include the user’s Timezone in the Call History subject, for example:

Inbound Call at 16:11:36 Europe/London from 07814256404 (Fred Bloggs)

Inbound Call at 16:14:28 Asia/Hong Kong from 01202528735 (John Smith)

Inbound Call at 16:14:50 Asia/Hong Kong from 01202528732 (Bournemouth)

Note: If the Apex class is not installed the softphone will work as usual however will not show a Timezone in the subject.

To Install the Salesforce Apex class:

Go to Setup -> Build -> Develop -> Apex Classes.

Select New Apex Class.

Paste the below code to the edit box and save.

```
global class GetCurrentUser{
```

```
webservice static String getUserTimeZone() {  
    TimeZone tz = UserInfo.getTimeZone();  
    return tz.getDisplayName();  
}  
  
webservice static String getUserId() {  
    return UserInfo.getUserId();  
}  
}
```

## How To Modify the InternalNumbersDigits Length (version 1.0.1+)

In the event that a site has internal extension numbers longer than 5 (default), you should add the method described below to the Apex class.

By adding this method you can override the default value. If the length of the phone number received during a call event is less than or equal to this value, then the call is considered to be an internal call.

Internal calls never get assigned a related entity (1.0.1)

Internal calls do not cause a contact search in Salesforce softphone

Add the following to the body of the Apex class.

```
webservice static integer getInternalNumbersDigitsLength(){  
    return 5; // change this value  
}
```

# Setting Search Entities

When a call is made or received you can customise which entities are searched for a match by configuring the Softphone Layout as below.

The screenshot displays the configuration interface for search entities. It is divided into two main sections: "Display these call-related fields:" and "Display these salesforce.com objects:".

**Display these call-related fields:**

- Caller ID, Dialed Number

**Display these salesforce.com objects:**

▼ Contact, Account, Lead, Case, Project

Available		Selections
Campaign		Contact
Capping Pattern		Account
Distribution hours		Lead
Distribution log		Case
Distribution log action		Project
Distribution Team	Add	
Distribution team alert	▶	
Distribution team member		
Distributor	Remove	
Distributor category	◀	
Distributor category team member		
Distributor rr-sa		
Distributor schedule log		
Distributor Tag		

Up  
▲  
▼  
Down


▶ **If single Contact found, display:** Name, Title  
*If multiple matches are found, only the Name is displayed in Salesforce Classic. In L*

▶ **If single Account found, display:** Account Name, Type, Account Number

NB: There are limitations in searching the Cases by phone number; this is a limitation of Salesforce API at the time of writing. Salesforce cannot search the associated contact for a Case.

If multiple matching entities are returned from Salesforce, then the adapter will follow the setting configured under "Multiple Matching records" in the Softphone Layout as shown below.

**Screen Pop Settings**

- ▶ **Screen pops open within:** Existing browser window
- ▶ **No matching records:** Pop to new Contact
- ▶ **Single-matching record:** Pop detail page
- ▼ **Multiple-matching records:** Pop to search page
  - Don't pop any screen
  - Pop to search page
  - Pop to Visualforce page  

## User Guide for Salesforce Adapter

The Salesforce Adapter presents a convenient embedded call control window in the Salesforce browser window to allow tight integration between Salesforce and the user's handset.

Users can interact with Salesforce to initiate calls, answer calls, and add new or "pop" existing entities such as Leads, Contacts, Cases etc. using the telephone number of the caller or called party. Call History records are also written against the selected entities.

## Key Features

Create a new Salesforce record (lead/account/case/etc)

Pop an existing Salesforce record

Click to call

Write a call record against a Salesforce entity

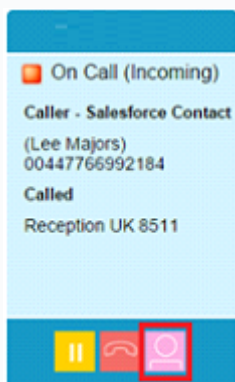
Answer, hold and hang up the call without leaving Salesforce

## User Interface

The Adapter provides an embedded user interface within the classic Salesforce view.

When a phone call is received, the adapter will automatically search through all the records held within Salesforce to find the number that is dialling in. Depending on what it finds, one of three things will happen:

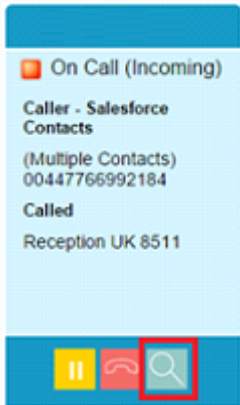
### One:



The phone number is found once: The Phone Panel displays a 'pop' button. This button allows the user to open the record that has been found.

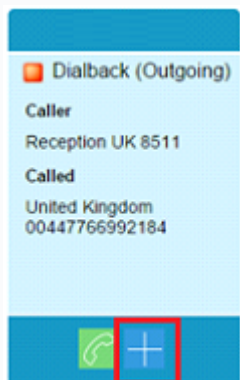
### Two:

Multiple instances of the phone number are found: The Phone Panel displays a 'search' button. Clicking this will show the multiple instances found, allowing the user to manually select the correct instance.



## Three:

The phone number is not found: The Phone Panel displays the 'New' button. Clicking this button will create and open a new entity with an association to the caller's number.



## Answer, Hold and Hang Up the Call Without Leaving Salesforce

The Adapter offers buttons for the call control features Answer, Hold and Transfer from within the Salesforce page.

# Click to Call



Click to call provides the ability to click on a phone number in Salesforce in order to have your desk phone dial that number. The Adapter also includes a convenient phone number dial field to allow the user to dial a custom number by entering the number and pressing the dial button.

NB: Recently new in-browser diallers have been introduced by third parties. If you are experiencing issues with dialling, you should ensure that no browser dialling addons are active.

## Adapter behaviour

### Writing a Call Record Against a Salesforce Entity

Telephone call activity recording is performed by inserting a completed Activity into Salesforce and where possible associating the activity with a Salesforce entity. This document uses the term “Call Record” to describe the activity record that is created in Salesforce.

When is a Call Record created?

A Call Record is created when a user running the Salesforce Adapter hangs up or transfers a telephone call from the handset that is monitored by the Adapter

## How is a Call Record Associated with a Salesforce Entity?

Associating a call to an entity is affected by multiple situations. This is because the only possible

matching opportunity is using the external phone number associated with the active call. Within Salesforce, a number can appear more than once e.g. against a contact, against a company or even multiple times in various leads. This means the recording method relies on user interaction to improve and confirm the entity associations.

Should a match be made, the user can pop into the entity and continue to use Salesforce as they typically would. On call completion, the Call Record will be saved and associated with the current open page. So, in the scenario where the first entity popped was not the preferred match and the user then navigates to the correct match (account for example), then the adapter will use the new entity as the preferred match.

If there is a single match for the contact for an inbound or outbound call, and no interaction is made (for example “popping” the contact record) then the call record will still be associated with that contact automatically.

If there is more than one match, then the user must select a contact for the Call Record to be associated with. If the user does not interact by navigating to an entity in Salesforce, a Call Record will still be added on call completion, but no entity association will be made.

Outbound calls are handled similarly to a single-matched record. For example, if click to dial is actioned from an entity’s page, it can be asserted that this is the correct entity to associate the Call Record with, so, in this case, if the user completes the call without any actual interaction, it will be associated with this entity.

## Impact of Transferring a Call

In telephony, a call is completed when a user transfers or hangs up the active call on their handset. So, in the transfer call scenario, there will be two or more call completion points, hence more than one call saved.

## Manual Dialling

What if you don’t dial or click to dial from within salesforce, that is, you manually make a call from the handset? If the user is logged into Salesforce and the Adapter is connected, the behaviour will be the same as if using “click to dial” from within Salesforce. i.e. if a single contact entity is matched it

will be associated with the entity, if more than one is matched and no interaction takes place to select the entity, then it will not be associated. However, if you are not logged in to Salesforce with the Adapter connected then no Call Record will be logged.

## Internal calls and Dialling rules

Internal calls are saved however from version 1.0.1 they will not be associated with the Salesforce entity. They will show in Call Center / Call related reports. Determining whether a call is internal or external is governed by the settings in client software that the Adapter uses to make the connection to the telephone system (by default a number of 6 digits or greater is treated as external).

## Reporting on Call Records

To report on call history, the user is required to create a Salesforce report. Follow the steps provided in the appendices on Creating Call History report.

As the call is recorded as a Salesforce Activity we are limited to what information we can store. (See appendices on Call Record Example.)

## Summary of Call Record Association handling

### Outbound

Click to dial has the best chance of correct association as uses the page dialled from.

If a single match is made that entity is associated with the call record.

If dialled from the List Page, like the Home page, then you should navigate to an entity for the correct association to occur.

Manual dial via number entry - the user should dial from the home screen i.e. not from an entities page. Without interaction, it will not associate with any entity, but if you are on a contact record it will associate with that record.

## Inbound

If a single match is made that entity is associated with the call record.

If multiple matches are found, then based on the user's interaction of selecting a contact will determine the association.

If not found and the user selects the new button, the call record is associated with the new record.

If not found and the call ends without selecting the new button then no association is made.

## Transfer

Multiple Calls records are created for each user who handles the call

Searches occur after a transfer - so the second user will need to navigate to the correct contact too

## Internal calls

Are saved - from 1.0.1 onwards are not associated with Salesforce entity other than user - internal calls follow dialling rules set in the client for min Length and must start with

# Dial from Handset.

Call recorded if Salesforce is open, logged in, Client is running, user has CRM license and Adapter is active on an open Salesforce page. No SF adapter no record saved. Note that some Salesforce pages do not have an Adapter section e.g. Report page and Chatter page

## FAQ

### **I know I called John Smith, but there is no call record. What could cause no call record?**

For a call record to be saved - the desktop Client must be running and "Connected" to the user's device AND Salesforce Adapter must be active "connected" and receiving events. If one of these conditions are not met then a call cannot be recorded.

### **Where can I see a report of all calls for my department?**

You will need to add a Salesforce report on Activities - follow the instructions in the Appendices (Creating Call History report).

### **I never made that call, where did it come from?**

Check if someone else logged into your Salesforce account and if they have a Salesforce adapter configured. This would generate a call record for your user when a call is made.

### **Why does my adapter say "Not Connected"?**

Check that your client is running and has a valid CRM/DB license.

### **I can dial from Salesforce but my adapter says not connected. Why?**

Click-to-dial is a basic level feature of the client software. The dial may be using a browser's add-on

or extension. In other words, you can configure click to dial in any browser even if you have a CLIENT license. So, it is feasible that you have enabled this via another method and it's not actually using the adapter to facilitate click-to-dial.

### **Why does the initial call show up in the adapter as a valid contact name, then it shows as not found?**

If you have configured another CRM integration in the client, e.g. Outlook, the event that is received may have been decorated with a found contact from another CRM and added this information to the call event. You should be aware that other CRMs can be configured alongside the SF adapter, but you should be aware of this behaviour.

## Appendixes

# Call Record examples

A call record is an Activity and includes the following fields

**Assigned to:** Salesforce user involved with the call

**Description:** text field describing the call in the format: at <Time> <Timezone> to/from <number> <contact name>

e.g. Outbound Call at 1:09:36 PM Greenwich Mean Time to 07814256404 (David Teague)

**Duration:** seconds

**Date:** Date of the call

**Priority:** Normal - this is set by Salesforce

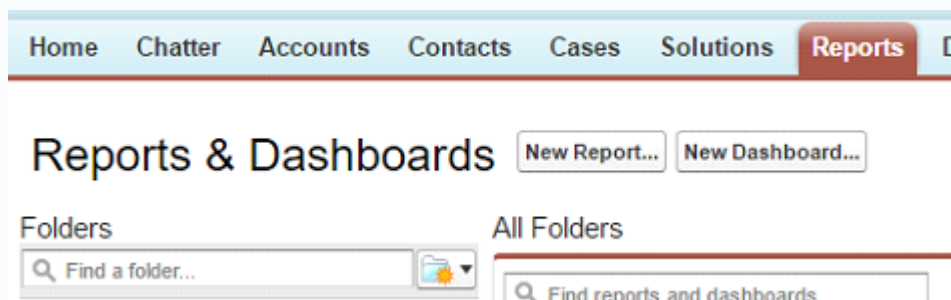
**Status:** Adapter sets the task as completed

**Task:** Ticked as per completed above

**Associated entity:** one or more entities] By associating the activity with an entity, the call is visible in an entity's Activity History panel

## Creating a Call History report

In salesforce navigate to the Reports tab and select New Report



Select an Activities and Task report and select "Create"

# Create New Report

Select Report Types to Hide i

### Select Report Type

- ⊕ Accounts & Contacts
- ⊕ Opportunities
- ⊕ Customer Support Reports
- ⊕ Leads
- ⊕ Campaigns
- ⊖ Activities
  - Tasks and Events
  - Events with Invitees
  - HTML Email Status
  - Activities with Accounts
  - Activities with Contacts
  - Activities with Opportunities

### Preview

Activity R
Count
Assigned
Joe Johnson
Shelly Smith
Tom Thomps
Grand Tota

You are taken to a customise page, select Save

Save Save As Close Report Properties Add F

### Fields

Drag and drop to add fields to the report.

- ⊖ Bucket Fields
  - Add Bucket Field
- ⊖ Activity Information
  - Assigned
  - Assigned Alias
  - Assigned Role
  - Assigned Role Display
  - Activity Type
  - Task Subtype
  - Event Subtype
  - Subject
  - Date

### Filters

Add

Show My team's activ

Date Field Date

To add filters, click Add.

---

**Preview** Tabular Form

Assigned	Subject
<b>Grand Totals (0 records)</b>	
No data was returned. Chec	

Name the report and specify its visibility/Report Folder.

**Save Report**
Help for this Page x

Report Name

Report Unique Name  i

Report Description

Report Folder My Personal Custom Reports v

Save Hierarchy Level  i

Your report is set to show data from the Hierarchy level of: "Ian Robinson"

Save
Save and Run Report
Cancel

You have created a Call report.

To improve the report we suggest adding Duration, and Call Start time.

## Feedback

Name	Roy Farrow
Role	Product Manager Advanced Services
	roy.farrow@gamma.co.uk
	07467 915 825
	0333 240 3478