

Application Notes:
MaxCS Connector
For Salesforce.com

September 2014

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These application notes are provided for administrators who are configuring AltiGen Communication's MaxCS Connector to work with Salesforce.com. The MaxCS Connector allows MaxAgent and MaxCommunicator to work with Salesforce.com.

These instructions cover:

- Administrator configuration (page 5)
- Installation on the client system (page 8)
- Basic instructions for using the connector (page 9)
- Connector settings (page 13)

Introduction

Salesforce.com provides a CTI toolkit to integrate its accounts with telephony systems, with which a softphone is created in a web browser for agent call control. AltiGen encapsulates the CTI toolkit into a MaxCS Connector, to integrate an AltiGen IP PBX system with Salesforce.com. This document describes how to configure this connector.

Refer to https://na9.salesforce.com/help/doc/en/cti_admin_deployadapter.htm for more details on deploying a CTI adapter. Refer to https://na9.salesforce.com/help/doc/en/cti_using.htm for details on how to use a softphone.

Once configured, the Salesforce connector provides screen pop-ups for incoming calls, and it places outbound calls from the Salesforce.com web site.

You can choose which type of data you want to try to match with the incoming Caller ID:

- Account
- Contact (Phone, Home phone, and Mobile phone information)
- Lead (Phone information)
- Case (Case number)

Requirements

The MaxCS server must meet the following minimum requirements:

- You must be running MaxCS 7.5
- MaxCS must be running on a server that is accessible to the clients
- MaxCS must have one AltiGen Salesforce Integration Seat License for each agent who will be using the MaxCS Connector for Salesforce.com

The client system must meet the following minimum hardware requirements:

- 2 GHz CPU or faster
- 1 GB available hard drive disk space
- 1 GB RAM
- SVGA monitor (1024 x 768) with 256 color display (or better)

The client system must meet the following software requirements:

- The client must be running MaxAgent or MaxCommunicator release 7.5
- The client must be running Windows 7 (64-bit) or Windows 8.1 (Note that 32-bit is not supported; the Salesforce CTI requires a 64-bit browser)
- The organization must be running either the Enterprise or the Professional edition of Salesforce, with privileges to run the CTI Toolkit
- An AltiGen Salesforce Integration Seat license must be installed on the MaxCS server

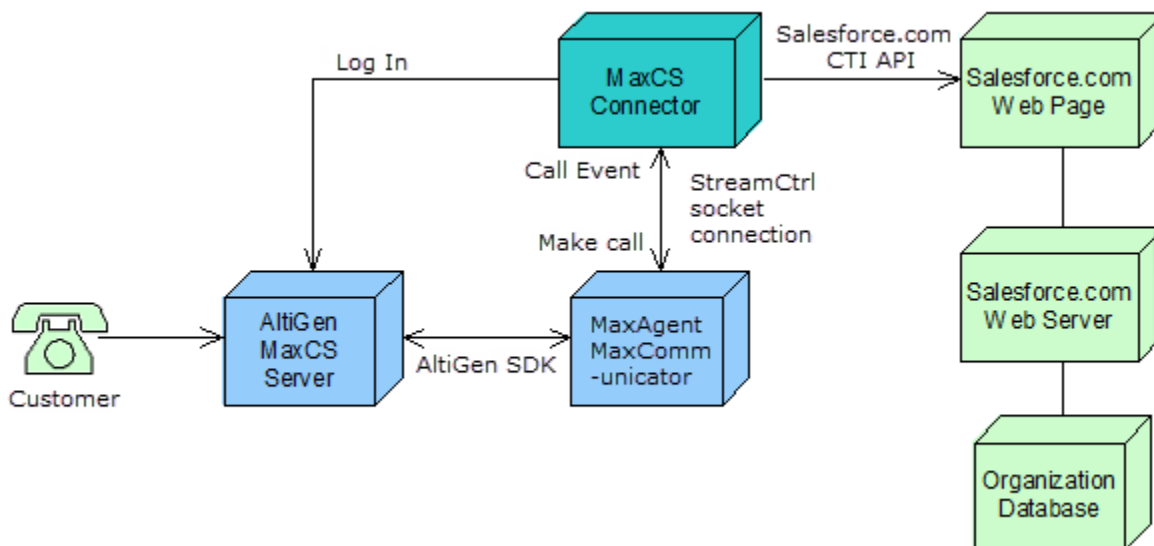
The following web browsers are supported:

- Internet Explorer version 8.0 and later
- Safari version 4.0 and later
- * Chrome version 10.0 and later
- * Firefox version 3.5 and later

* When using Chrome or Firefox, you may see an icon on the address bar indicating that the page has some unsecured scripts. If this occurs, click the icon to allow scripts to run, and then click the **Connect CTI Adapter** button. For details, refer to <https://help.salesforce.com/HTViewSolution?id=000187116>. Also, refer to the section [Troubleshooting](#) for browser-specific tips.

Architecture

The MaxCS Connector for Salesforce will work with Salesforce.com CTI API and connect to MaxAgent or MaxCommunicator. It will also connect (via the AltiGen SDK) to the MaxCS server during the login process, to check the Salesforce Integration license.



Configuring the MaxCS Salesforce Connector

This section describes how administrators import the connector XML file and add users to the connector.

Step 1: Import the Call Center CTI Adapter

Make sure you have Manager account privileges in Salesforce.com.

To configure your enterprise's Salesforce account to work with the MaxCS Connector,

1. Log onto your Salesforce administrator account.
2. In Salesforce.com, click **Setup** by clicking the Down arrow next to the account name.
3. Under **App Setup** (left column), click **Customize** > **Call Center** > **Call Centers**.
4. Click **Import**, and then click **Choose File**.



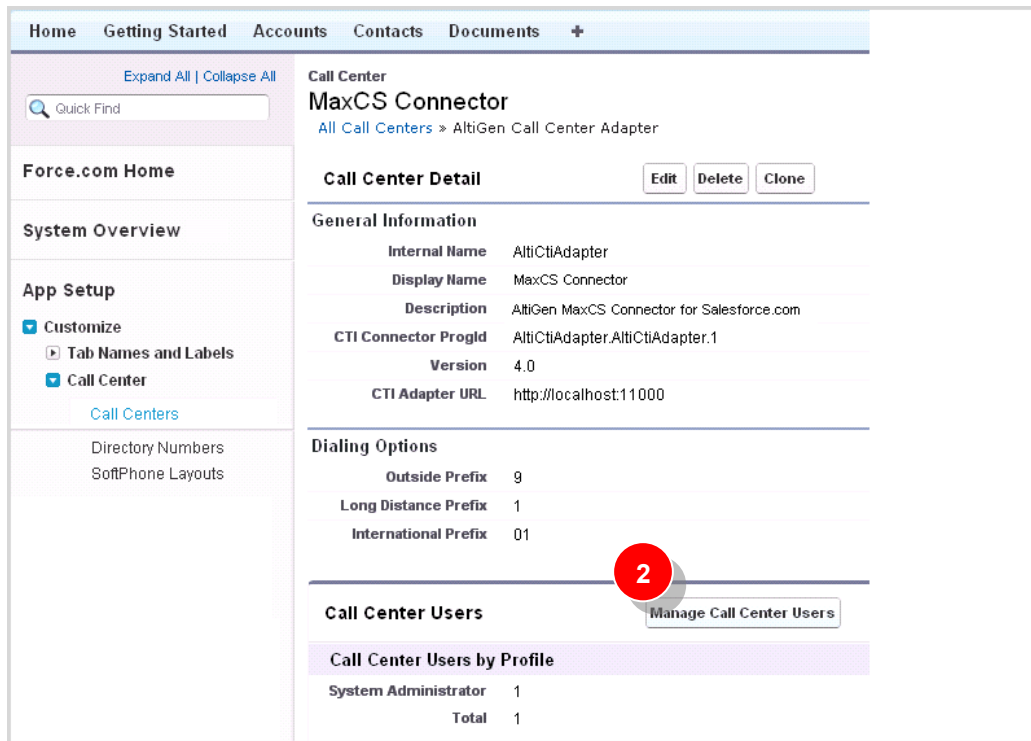
5. Open the MAXCS installation media or DVD.
6. Navigate to the Salesforce Connector folder and import the file `MaxCSConnector.xml`.

The MaxCS Connector should now appear in the call center list.

Step 2: Add Users to the Connector

Next, add the users who will be allowed to use this MaxCS Connector.

1. In the Call Center list, click **MaxCS Connector**. Details of the call center appear.
2. Near the bottom, click **Manage Call Center Users**.



Home Getting Started Accounts Contacts Documents +

Expand All | Collapse All

Quick Find

Force.com Home

System Overview

App Setup

- Customize
 - Tab Names and Labels
 - Call Center
 - Call Centers
 - Directory Numbers
 - SoftPhone Layouts

Call Center

MaxCS Connector

All Call Centers > Altigen Call Center Adapter

Call Center Detail Edit Delete Clone

General Information

Internal Name	AltictiAdapter
Display Name	MaxCS Connector
Description	Altigen MaxCS Connector for Salesforce.com
CTI Connector Progid	AltictiAdapter.AltictiAdapter.1
Version	4.0
CTI Adapter URL	http://localhost:11000

Dialing Options

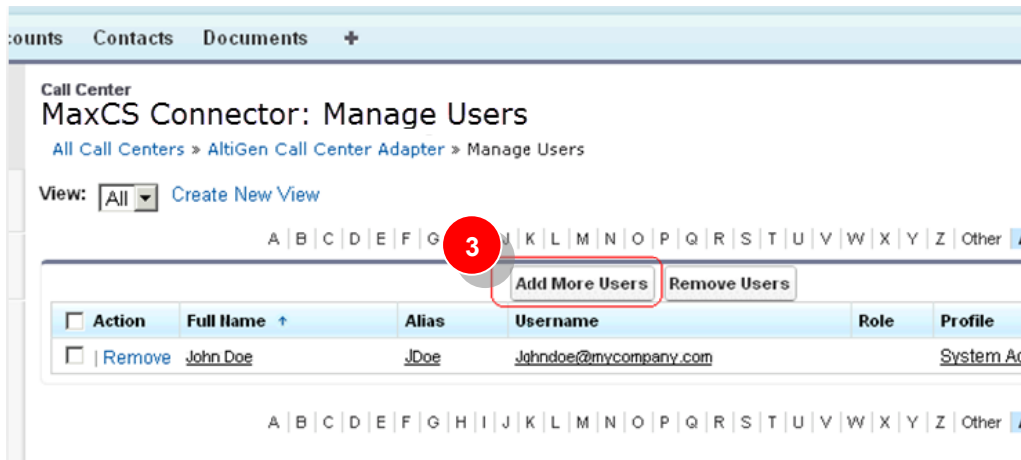
Outside Prefix	9
Long Distance Prefix	1
International Prefix	01

Call Center Users Manage Call Center Users

Call Center Users by Profile

System Administrator	1
Total	1

- On the Manage Users page, click **Add More Users**.



Accounts Contacts Documents +

Call Center

MaxCS Connector: Manage Users

All Call Centers > Altigen Call Center Adapter > Manage Users

View: All Create New View

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

Add More Users Remove Users

Action	Full Name	Alias	Username	Role	Profile
<input type="checkbox"/> Remove	John Doe	J.Doe	Johndoe@mycompany.com		System Administrator

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

- To search for a user, enter your search criteria in the *Search for New Users* page. Click **Find**.
- In the search results, select the desired user and click **Add To Call Center**. That user can now use the MaxCS Connector.

Step 3: Assign a SoftPhone Layout to Users

Be sure to assign a softphone layout to each user. You can do this under **App Setup** in the **Customize > Call Center > SoftPhone Layouts** page.



Step 4: Configure MaxAdministrator

You must have one Salesforce Integration seat license for each agent who will be running the MaxCS Connector.

MaxCS Connector will receive caller ID and IVR data, and will call the Salesforce.com API to match a record in the customer database.

- *Caller ID* is from the Central Office (CO)
- *IVR data* is configured in the MaxAdministrator Auto Attendant (AA) panels

You must set up an AA entry, configuring it to collect digits based upon a value tag and the length of the digits.

AA Configuration Example

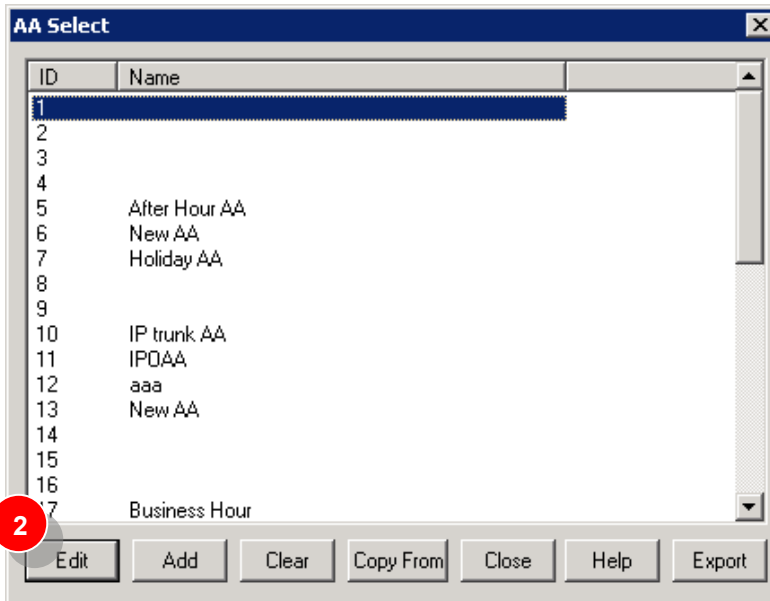
Salesforce has a page for cases; each case has an 8-digit case number prefixed with zeroes. The field name of a case number is **Case.CaseNumber**.

In this case, you could configure an AA entry with the tag set to **Case.CaseNumber** and the digit length set at 4 – 8.

If a user entered 1234 at this menu, the MaxCS Connector would receive IVR data “Case.CaseNumber =1234”. The next figure shows how you would configure this AA entry.

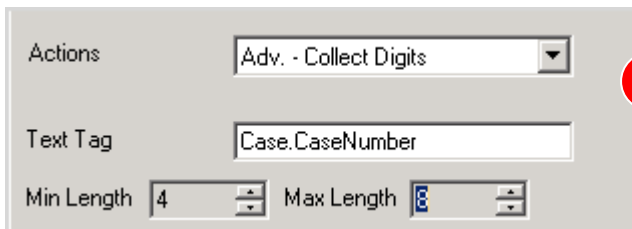
To configure MaxAdministrator,

1. In MaxAdministrator, choose **System > AA Configuration**.
2. In the list, select an AA to update, and then click **Edit**.



3. Configure the AA entry as follows, and then click **OK**.

- Set **Actions** to *Adv. – Collect Digits*
- Set **Text Tag** to *Case.CaseNumber*
- Set **Min Length** to 4
- Set **Max Length** to 8



Installing the MaxCS Connector on Client Systems

Note: You must install MaxAgent or MaxCommunicator *before* you install the MaxCS Connector.

Install the connector on the system of each user who will be using the MaxCS Connector.

1. Open the MAXCS installation media from the client system.

2. Navigate to this folder:

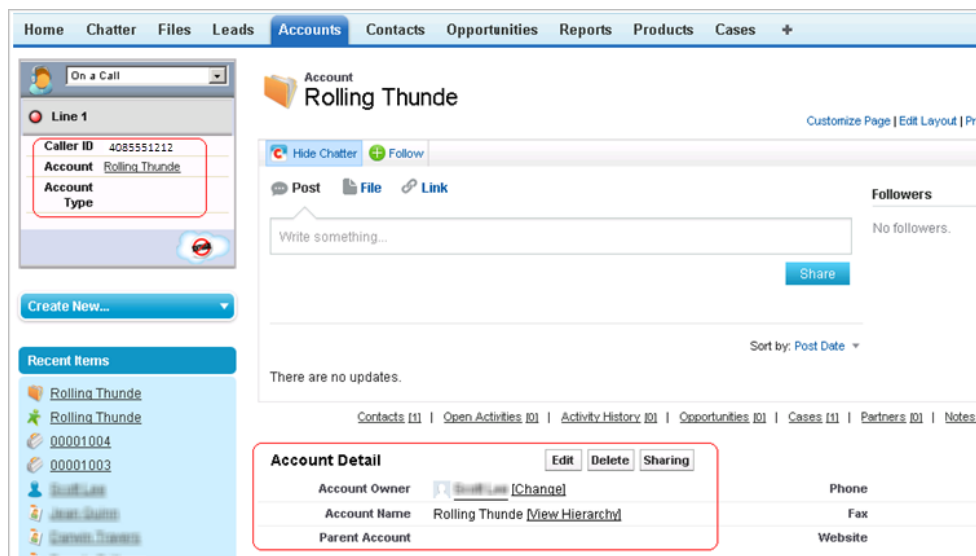
\MaxCS Connector for Salesforce\Setup

3. In that folder, run **Setup.exe**.

The next time the client system is rebooted, the MaxCS Connector will automatically start as part of the Startup services. Until you reboot, you can run the MaxCS Connector from Windows: Click **Start > All Programs > MaxCS Connector for Salesforce > MaxCS Connector**.

Testing the MaxCS Connector

To test that MaxCS Connector is working properly, place calls to the extension. You should see the call alert in the panel, with the Caller ID. If the Caller ID matches a contact in the Directory, the contact information will appear in the panel.



Using the MaxCS Connector

This section is provided for users who will be using the MaxCS Connector with MaxAgent or MaxCommunicator. Note that MaxAgent or MaxCommunicator must be running before you run the MaxCS Connector.

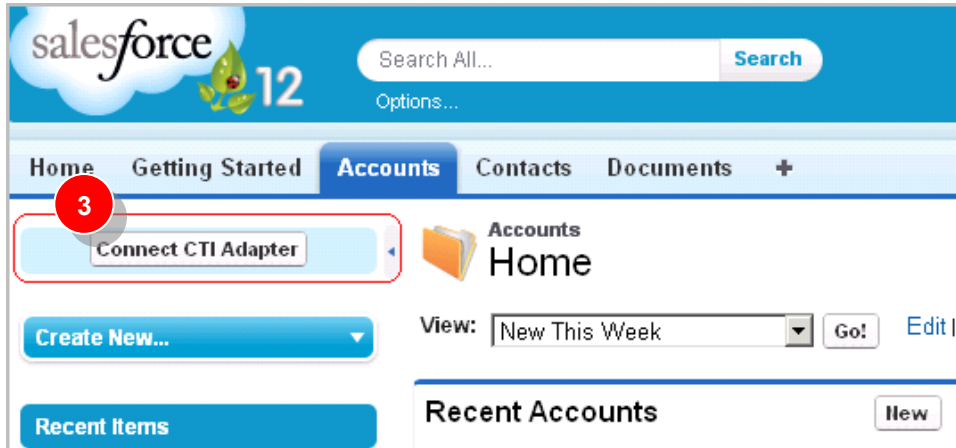
1. If the MaxCS Connector has already been started, you will see an icon  in the Windows tray area.

If you do not see this icon, you can run the connector manually: Click **Start > All Programs > MaxCS Connector for Salesforce > MaxCS Connector**.

2. Log into your Salesforce.com account.

The softphone should appear at left-top corner while you are viewing the *Contacts*, *Leads*, *Activities*, or *Accounts* pages. Initially, it appears as a **Connect CTI Adapter** button, as shown in the next figure.

- Click **Connect CTI Adapter**. The login panel opens.

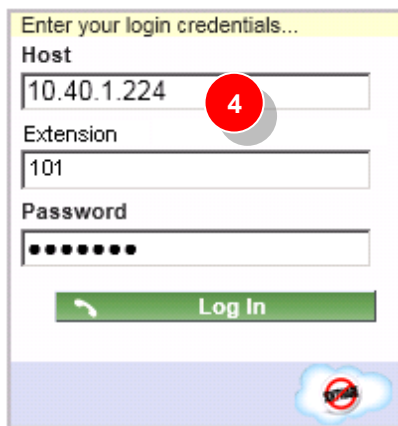


- Enter your login information and click **Log In**:

Host -- Enter either the MaxCS Server IP address or the Fully Qualified Domain Name (FQDN); contact your administrator for this information.

Extension -- Enter your extension number.

Password -- Enter the password for that extension.



Enter your login credentials...

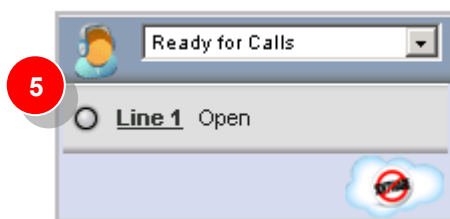
Host
10.40.1.224

Extension
101

Password
••••••••

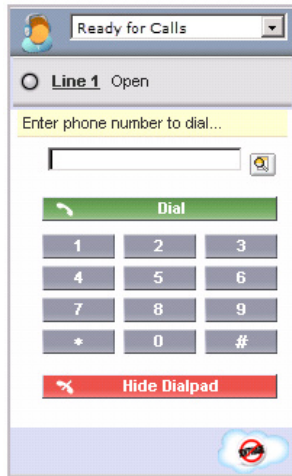
Log In

- Once the MaxCS Connector connects with the MaxCS server, the small left panel should say "Ready for Calls" as the status.



About Call Control

The MaxCS Connector softphone does not provide call control features. For example, there is no *Answer* or *End Call* button. In addition, calls that are on hold will not be listed in the softphone.

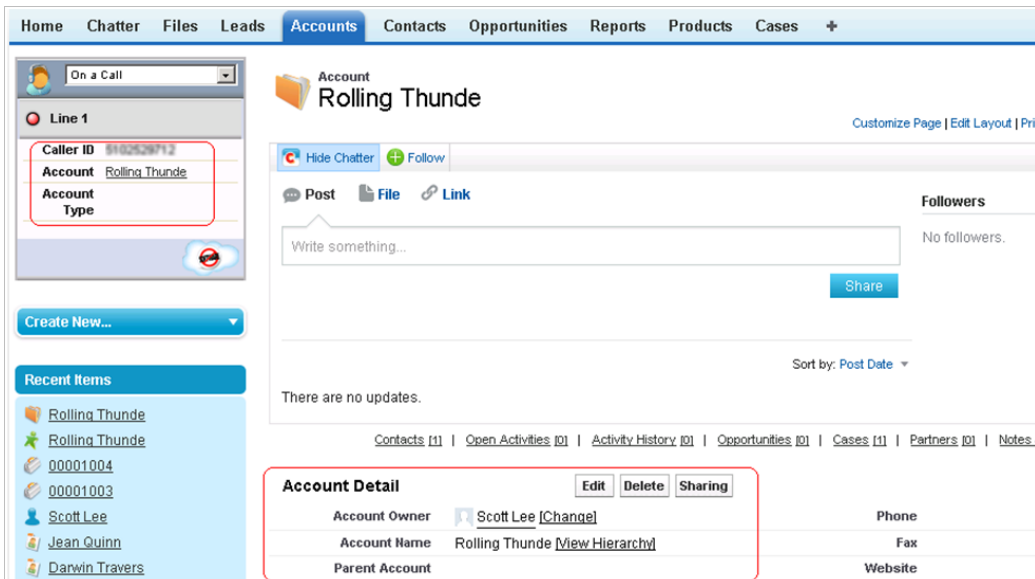


The softphone will show your state. The state will be either *Idle* or *Busy*:

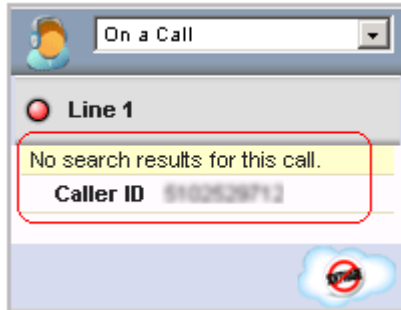
- The MaxAgent / MaxCommunicator states *Idle*, *Offhook*, *Softoffhook* will appear as **Idle**.
- All other states will appear in the Connector as **Busy**.

Receiving Calls

When a call comes in, the MaxCS Connector receives the Caller ID and/or the IVR data. Depending upon how you configured the MaxCS Connector options, the Salesforce page opens with the retrieved data.



Call information may include Caller ID and IVR data. If IVR data is present, the connector first searches the IVR data record; otherwise, the connector searches according to the user's settings (discussed in the section [Configuring MaxCS Connector Settings](#) on page 13).



If no data can be matched to the data from the call, the panel will show a message that no matching results were found.



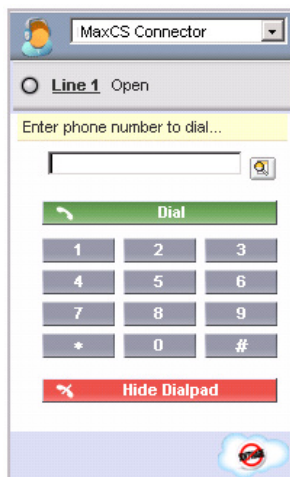
If no result is found for IVR data, but multiple records match the Caller ID, then those matching records will be listed.

Those records will not appear in the main window; they appear only in the softphone.

Making Calls

On the Salesforce.com web page, phone number fields are shown with a hotlink and a handset icon next to them. Clicking the hotlink or the icon will dial the number. The MaxCS Connector will forward the call control to MaxAgent or MaxCommunicator.


You can also make outbound calls from the MaxCS Connector panel:



1. Click the "Line 1" hotlink. A dial pad opens.
2. Enter the phone number in the field.
3. Click **Dial**.

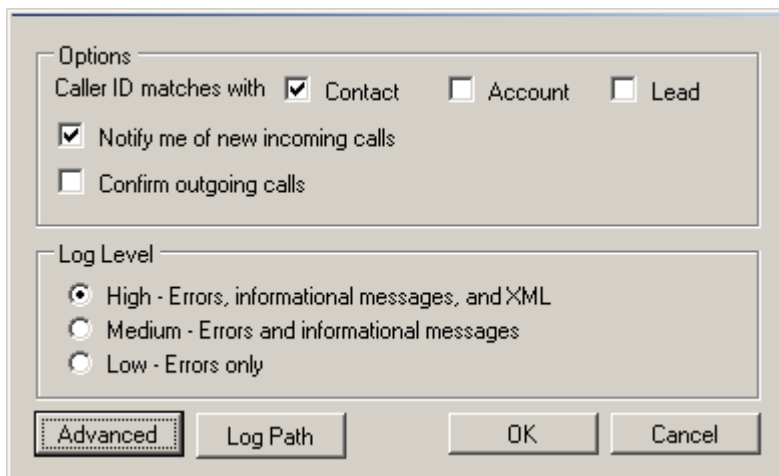
To log out of the MaxCS Connector, choose **Log Out** from the pull-down menu in the softphone.

Configuring MaxCS Connector Settings

While the MaxCS Connector is running, an icon appears in the Windows tray area.  Right-click this icon to open the menu.

- **Settings** – Opens the Settings window
- **About** – Shows information about the MaxCS Connector
- **Exit** – Closes the MaxCS Connector

When you choose **Settings** from the menu, a window offers various options.

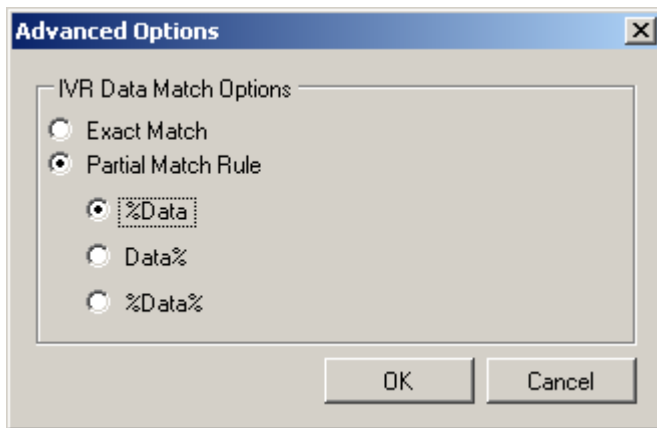


The dialog box is titled "Options" and contains the following settings:

- Caller ID matches with:** Three checkboxes are present: ☒ Contact, ☐ Account, and ☐ Lead.
- ☒ Notify me of new incoming calls
- ☐ Confirm outgoing calls
- Log Level:** Three radio buttons are present: ☒ High - Errors, informational messages, and XML; ☐ Medium - Errors and informational messages; ☐ Low - Errors only.

At the bottom of the dialog box are four buttons: **Advanced** (highlighted with a dashed border), **Log Path**, **OK**, and **Cancel**.

- **Caller ID matches with** – Select which type of data you want to match against the caller ID of incoming calls; contact, account, and/or lead.
- **Notify me of new incoming calls** – Shows a pop-up window when a call comes in, letting you choose whether to open Salesforce.com. If you clear this setting, incoming calls will automatically open Salesforce.
- **Confirm outgoing calls** – Shows a confirmation message when you click a phone number in Salesforce to make a call.
- **Log Level** – Specify what type of data will be logged. The default level is **Low**.
 - » **High** – Logs errors, informational messages, and XML
 - » **Medium** – Logs only errors and informational messages
 - » **Low** – Logs only errors
- **Advanced** – Offers advanced string query options. These options apply to string value queries only; they do not work for number values.
 - » **Exact match** – Match string values exactly
 - » **%Data** – Match strings from the right
 - » **Data%** – Match strings from the left
 - » **%Data%** – Match strings in the middle



- **Log Path** – Shows the path to the folder where log files are written.

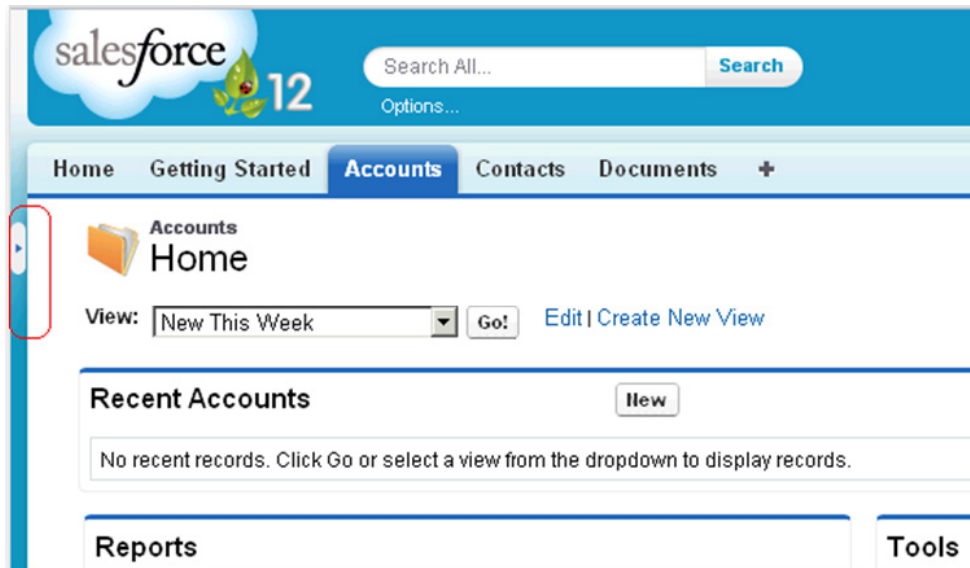
Troubleshooting

This section describes a few issues that could arise while using the MaxCS Connector, and how you can try to resolve them.

The Connector Panel Does Not Open

If the MaxCS Connector panel does not appear, follow these steps:

1. Check with your administrator, to make sure that your user account has been added to the list of users who can access the MaxCS Connector.
2. Within Salesforce.com, click either **Accounts** or **Contacts** to open one of those pages.
3. If you still do not see the MaxCS Connector panel, check whether the left panel has been hidden. If this is the case, a small arrow appears on the left side, as shown in the next figure. Click the arrow to expand the panel.



4. Set the MaxCS Connector log level to High (refer to the section [Configuring MaxCS Connector Settings](#) starting on page 13. Browse several pages and then review the log file for information.
5. If the panel still will not open, contact AltiGen Technical Support.

Security Warning

While browsing in Internet Explorer, you may sometimes see “Do you want to view only the webpage content that was delivered securely?” To disable this message so that it does not reappear, follow these steps (these steps may vary from one version of the browser to another). The following steps apply to Internet Explorer.

1. In the browser, click **Tools > Internet Options > Security**.
2. Click the **Security** tab.
3. Click on the *Internet zone* icon at the top of the tab page.
4. Click **Custom Level**.
5. In the **Miscellaneous** section, change *Display mixed content* to **Enable**.
6. Repeat these steps for the *Local intranet*, *Trusted sites*, and *Restricted sites* zones.

Note: The security settings for your browser may block non-secured content, which could prevent the pop-up from being displayed. It may be necessary to adjust your browser’s security settings to display these pop-ups.

Privilege Warning

If a warning about privileges appears when using the MaxCS Connector, you can try this procedure to avoid the recurring warnings. The following steps apply to Internet Explorer.

1. In your browser, click **Tools > Internet Options > Security**.
2. Click the **Security** tab.

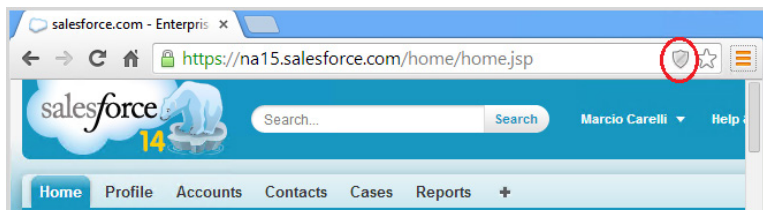
3. Click the *Internet Zone* icon at the top of the page.
4. Click **Custom Level**.
5. In the Miscellaneous section, change *Websites in less privileged web content zone can navigate into this zone* to **Enable**.
6. Repeat these steps for the *Local intranet*, *Trusted sites*, and *Restricted sites* zones.

Lost Connection

The MaxCS Connector checks its connection with MaxAgent or MaxCommunicator each minute. If MaxAgent or MaxCommunicator stopped and then restarted, you do not need to restart the MaxCS Connector. After a minute, the connector will regain its connection.

Settings for Chrome Browsers

When logged in to Salesforce.com, Chrome will show a badge icon on the right side of the address bar, indicating that this page has some unsecured scripts.

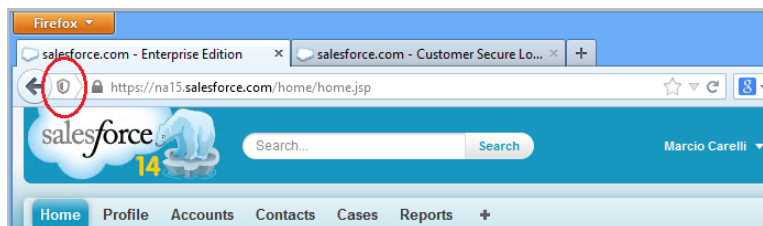


Click that icon to allow scripts to run, and then click the **Connect CTI Adapter button**. The softphone should now appear.

Another solution is to add a startup parameter to the Chrome shortcut icon, “—allow-running-insecure-content”. By clicking this shortcut icon to launch Chrome, instead of clicking the Windows bar icon, the MaxCS Connector will work correctly.

Settings for Firefox Browsers

When logged in to Salesforce.com, Firefox will show a badge icon on the left side of the address bar, indicating unsecure scripts.



Click that icon and select “Disable protection on this page.” The softphone should now appear.

To change the settings permanently, open the About:config page and change these options to *False*:

- security.warn_viewing_mixed=false
- security.mixed_content.block_display_content=false
- security.mixed_content.block_active_content=false

AltiGen Technical Support

AltiGen does not provide general configuration support for Salesforce. For general configuration information, refer to your Salesforce documentation.

AltiGen provides technical support to Authorized AltiGen Partners and distributors only. End user customers, please contact your Authorized AltiGen Partner for technical support.

Authorized AltiGen Partners and distributors may contact AltiGen technical support by the following methods:

- You may request technical support on AltiGen's Partner web site, at <https://partner.altigen.com>. Open a case on this site; a Technical Support representative will respond within one business day.
- Call 888-ALTIGEN, option 5, or 408-597-9000, option 5, and follow the prompts. Your call will be answered by one of AltiGen's Technical Support Representatives or routed to the Technical Support Message Center if no one is available to answer your call.

Technical support hours are 5:00 a.m. to 5:00 p.m., PT, Monday through Friday, except holidays.

If all representatives are busy, your call will be returned in the order it was received, within four hours under normal circumstances. Outside AltiGen business hours, only urgent calls will be returned on the same day (within one hour). Non-urgent calls will be returned on the next business day.

Please be ready to supply the following information:

- Partner ID
- AltiGen Certified Engineer ID
- Product serial number
- AltiWare or MAXCS version number
- Number and types of boards in the system
- Server model
- The telephone number where you can be reached