MaxCS Release 8.5
Salesforce Integration Guide

October 2016

Contents

This guide is provided for administrators who are configuring AltiGen Communication's MaxCS 8.5 on premise to work with Salesforce.com. The instructions cover:

- How administrators configure the Salesforce Connector, beginning on page 4

- How agents enable the Salesforce pop-up in MaxAgent, on page 18

Introduction

Salesforce provides an OpenCTI toolkit to integrate its accounts with telephony systems. A softphone is created in a web browser for agents to handle calls.

When calls come in, the Salesforce Connector retrieves the IVR data and looks for a ID match in the customer database based upon the Caller ID, Contact, Account, or Lead information.

Salesforce OpenCTI is server-side technology; there is no software to install on the client systems.
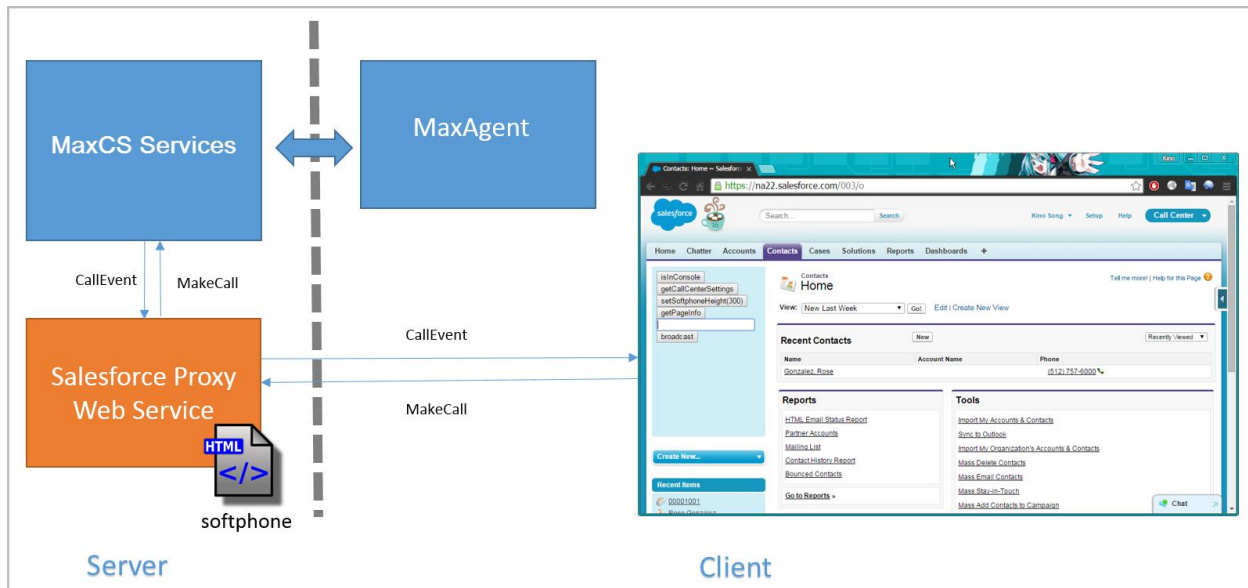

Figure 1: Overview or Salesforce integration

Requirements

In order to integrate Salesforce with MaxCS, your environment must meet the following requirements:

- The MaxCS server must be running **Windows Server 2012 R2**

- The MaxCS server must be running IIS version 8.0 or later

- The MaxCS server must be running .Net Framework version 4.5 or later

- The MaxCS server must be running MaxCS Release 8.5 or later

- The MaxCS server must be accessible to the client applications

- Because only HTTPS is supported, you must have a public web server certificate

- You must have your own Salesforce environment that supports OpenCTI, which includes the following deployments:

  - Enterprise, Performance, Unlimited, and Developer Editions with the Service Cloud

  - Performance and Developer Editions with the Sales Cloud

  - Enterprise and Unlimited Editions with the Sales Cloud

- Agents who will be using Salesforce must have a MaxCS Salesforce Integration Seat license applied to their accounts

- Agents who will be using Salesforce must have the MaxAgent client application

Note that the Salesforce Connector is not supported on MaxCS chassis (hardware) deployments.

Step 1: Install IIS

Please install IIS according to this URL: https://www.iis.net/learn/install/installing-iis-85/installing-iis-85-on-windows-server-2012-r2

We recommend that you check all options under Role Services, to make sure that the Salesforce Connector works properly.
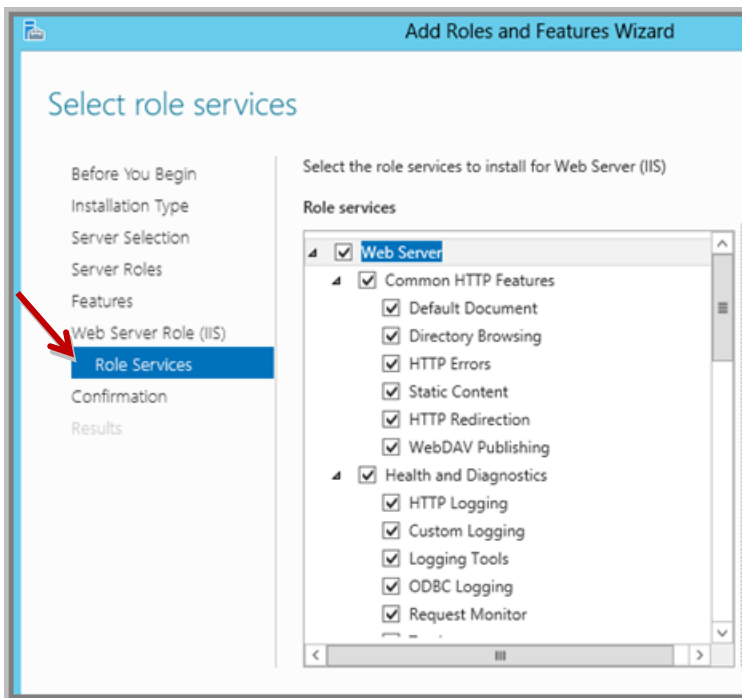

Figure 2: IIS Role Services options

Step 2: Download and Install the Salesforce Connector

The Salesforce Connector is available on the Partner website. To download the file:

1. Log into the AltiGen Partner website at https://partner.altigen.com.

2. Near the top, click **File Updates**.

3. On the left, below "WTS System," click **General Availability**.

4. From the list, click the Salesforce Integration update. Download the file onto the MaxCS server.

5. Extract the zipped files.

To install Salesforce integration on the MaxCS server,

1. Run the *setup.exe* program that you extracted earlier.

2. Follow the instructions in the installation wizard.

Step 3: Configure IIS

Salesforce integration requires a softphone page to be hosted on a valid HTTPS server. Therefore, a public certificate is required in IIS.

Public Web Server Certificate Requirements

If you do not already have a valid public SSL web server certificate, you may find this article helpful:

http://www.vkernel.ro/blog/request-and-install-ssl-certificates-in-microsoft-iis-78

Considerations:

- The HTTPS server should be your MaxCS server. They should be located on the same system.

- You can purchase a public SSL Web Server certificate from certificate authority vendors such as Verisign, Go Daddy, and so on.

- The SSL Web Server certificate needs to match your web server's URI. If you already have a wildcard SSL Web Server certificate that matches the web server's URI, it can be used.

- Make sure that you provide the correct web server URI to the vendor when you purchase the SSL Web Server certificate. If the URI is mismatched, it will not be useable.

IIS Configuration Steps

In the example used throughout this section, the web server URI that is used is *https://skyace.engsfb2015.com*.

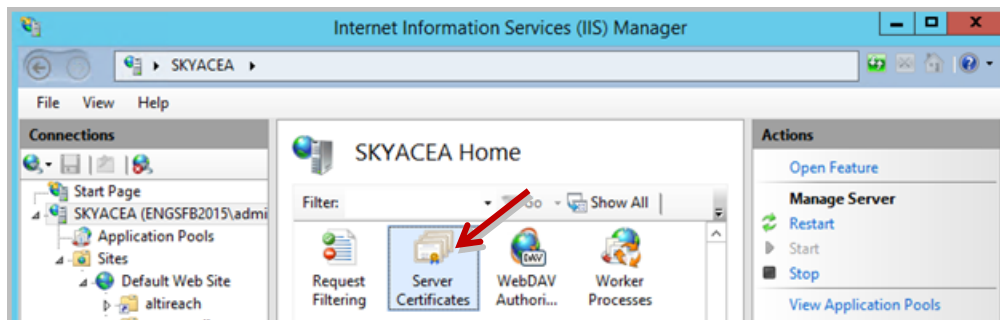1. Open IIS Manager on the MaxCS server. Double-click **Server Certificates**.

Figure 3: Double-click Server Certificates in IIS

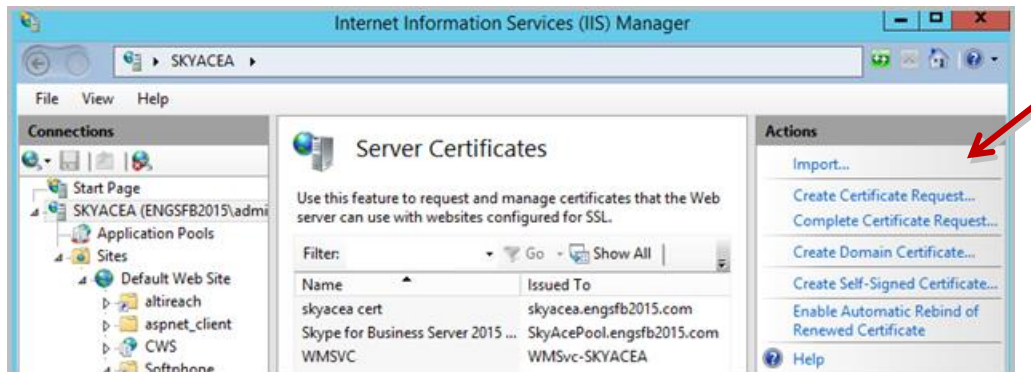2. Click **Import** on the list to the right.

Figure 4: Import the certificate

3. Browse to select the public certificate. Click **Next**.

4. Continue through the remaining panels of the installation wizard.

5. After you finish the installation process, in IIS, right-click your web site from the *Sites* list in the panel on the left and choose **Edit Bindings**.
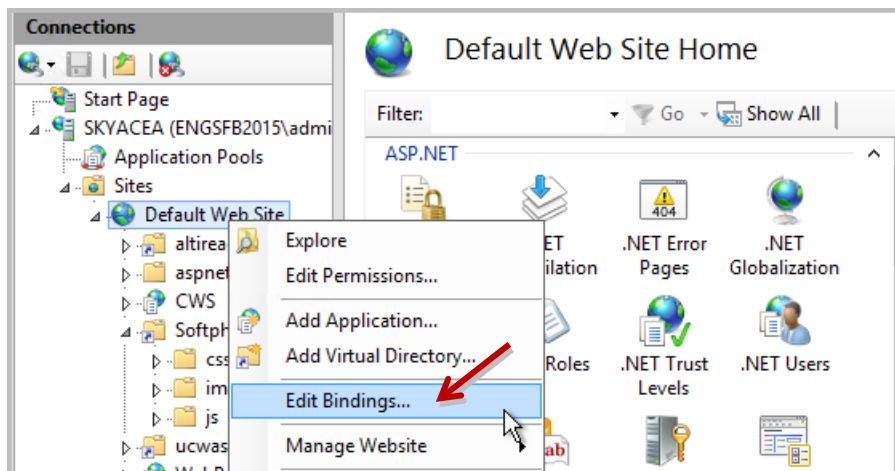

Figure 5: Edit bindings for the web site

6. In the Site Bindings panel, click **Add**.

7. In this example, we use port 8443 instead of the default port 80, in order to avoid conflicts on port 80. In the *Add Site Binding* panel, select the following parameters and then click **OK**.

   • For the *Type* field, select **https**.

   • For the *Port* field, enter **8443**.

   • For the SSL certificate field, select the certificate that you just imported.
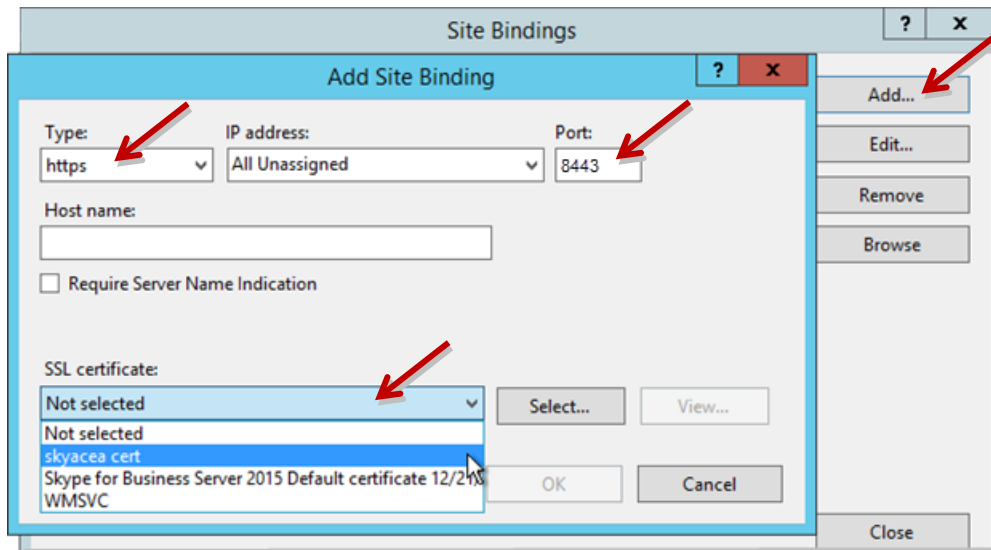
   • Leave the other fields as they are.

Figure 6: Select the certificate that you imported

8. Close IIS Manager.

9. To verify the IIS configuration, open a browser and navigate to *https://<fqdn>/softphone/softphone.html*, substituting the web site's FQDN for the placeholder <fqdn>. This URL is the CTI Adapter URL. This URL will be used in one of configuration steps later.

   In our examples in figures in this configuration guide, the CTI Adapter URL used is *https://skyacea.engsfb2015.com/softphone.html*.

10. Make sure that you see a panel similar to the following image, which indicates that the browser is treating the certificate as a valid certificate.
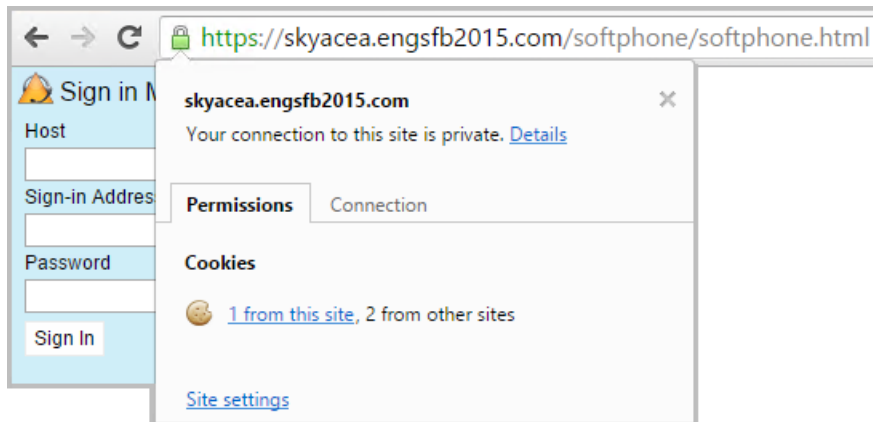

Figure 7:Make sure that the certificate is accepted as valid

Step 4: Import a MaxCS Call Center into Salesforce

This section describes how to import a Call Center XML definition for MaxCS.

1. Log into Salesforce.com with administrator privileges. Click **Setup** near the top of the page.
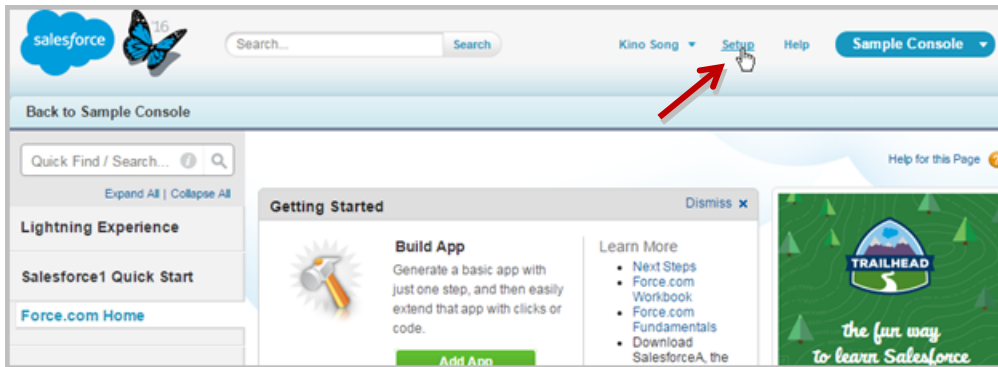
Figure 8: Log in and click Setup

2. In the "Quick Find/Search" field on the left, enter the word **call**. Then click **Call Centers** on the left.
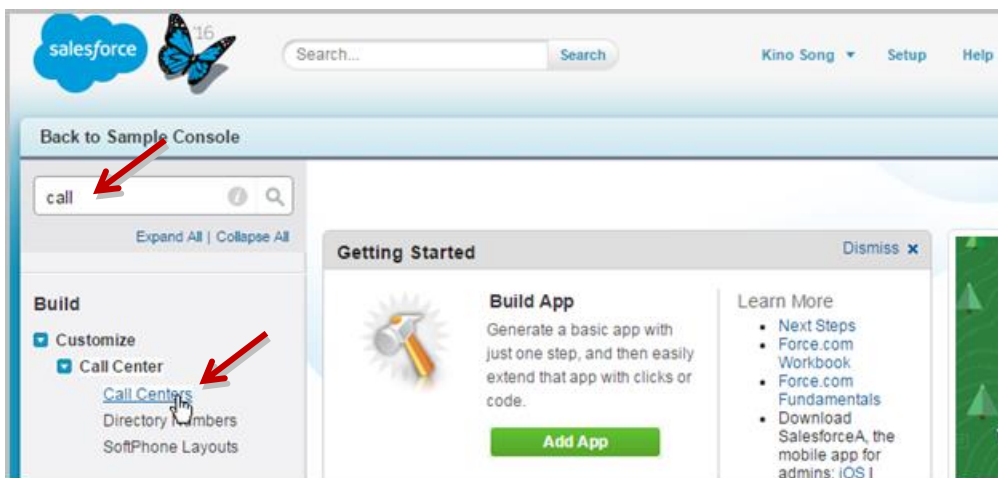

Figure 9: Search for Call and then click Call Centers.
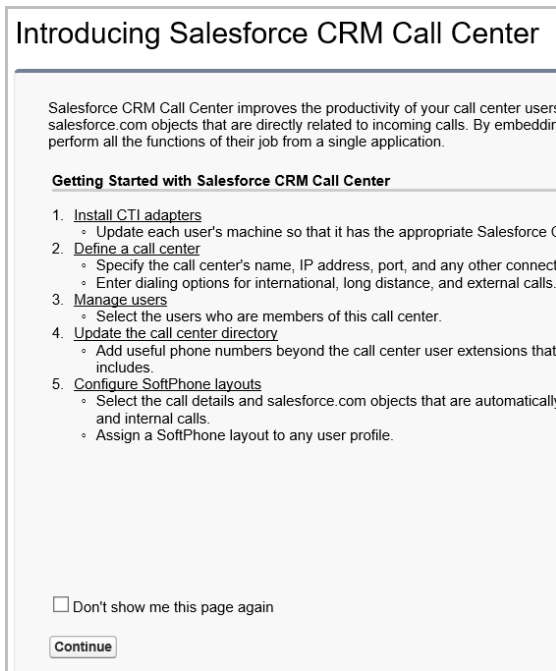
3. Click **Continue**.

Figure 10: Click Continue

4. On the *All Call Centers* page, click the **Import** button, which is located just above the list.
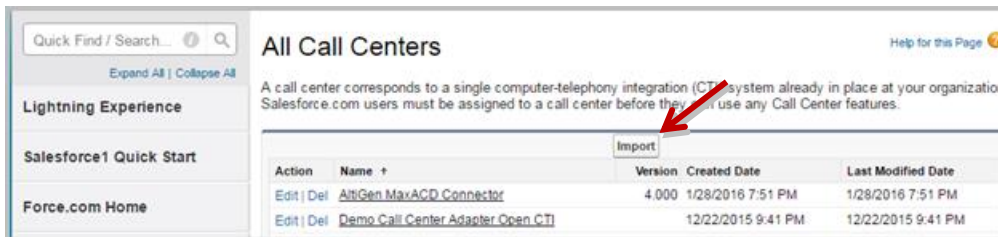

Figure 11: Click Import

5. Click **Choose File**. Navigate to this XML file and then click **Open**:

C:\Program Files (x86)\AltiGen\SalesforceIntegration\Deployment\MaxCSCallCenter.xml.
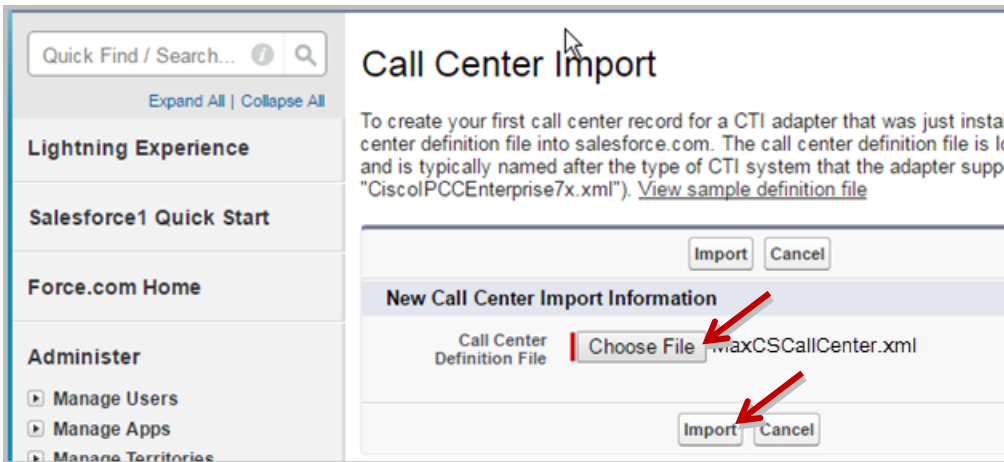
Figure 12: Choose the file "MaxCSCallCenter.xml"

6. Click **Import**. Now that you have imported the call center, you will configure it. In the list, you should see an entry "MaxCS Call Center." Click the **Edit** link on that row. This opens a new panel.

Figure 13: Click Edit beside the entry "MaxCS Call Center"

7. On the *Call Center Edit* panel, edit the *CTI Adapter URL* field by replacing the placeholder "*localhost*" with your MaxCS 8.5 server FQDN and append port 8443 to the end (we used port 8443 on page 6). For example, *https://skyacea.engsfb2015.com:8443/softphone.html*. Click **Save**.
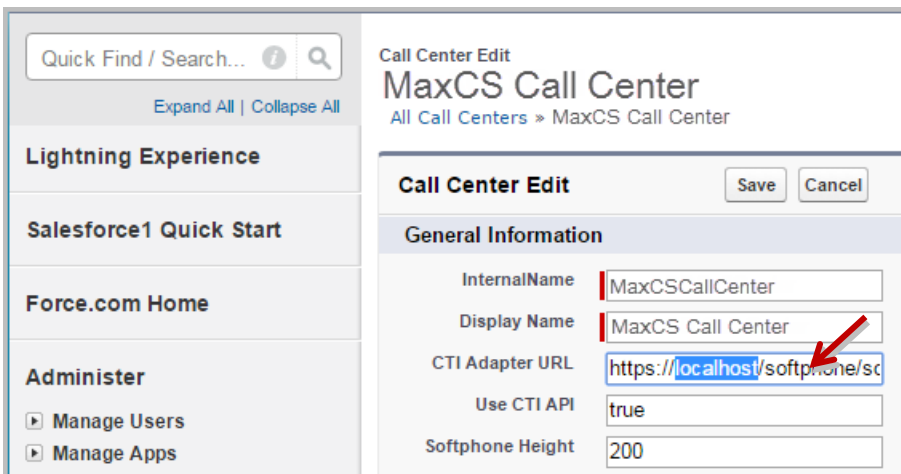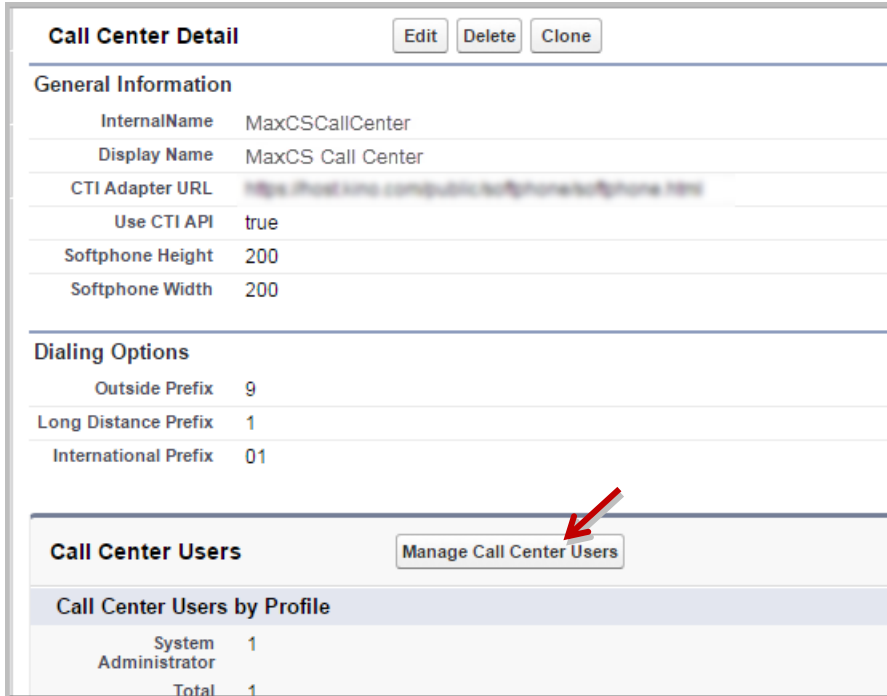

Figure 14: Edit the URL by entering the MaxCS server FQDN

Step 5: Add Users to the MaxCS Call Center

Next, you will add the users who will use the Salesforce Connector.

1. Click **Manage Call Center Users**.

Figure 15: Click the "Manage Call Center Users" button

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

3. To search for a user in your Active Directory, enter your search criteria and click **Find**.

4. In the search results, select the desired users and click **Add to Call Center**.

5. Repeat steps 3 and 4 until all appropriate users have been added.

Step 6: Import Apex

Apex is a programming language that allows developers to add business logic to most system events. Apex is used with the MaxCS Salesforce Connector.

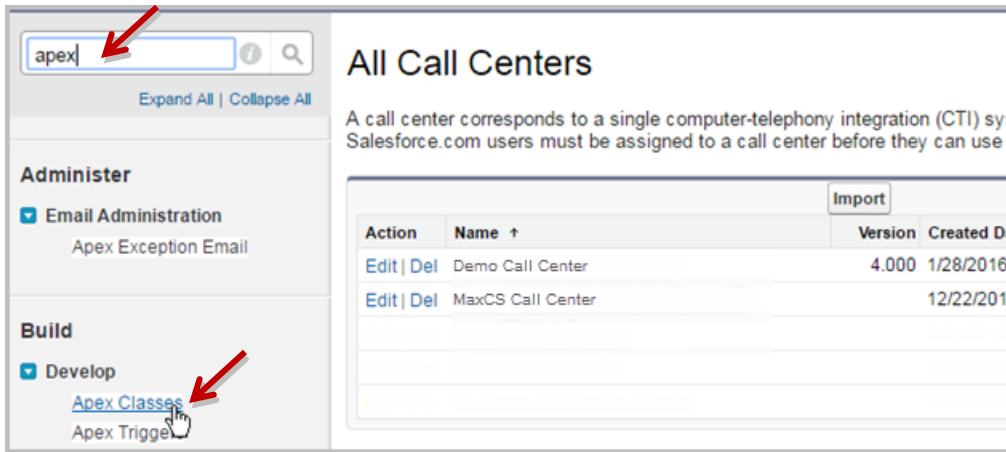1. In the "Quick Find/Search" field on the left, enter the word **apex**.

Figure 16: Click the "Apex Classes" link

2. In the list on the left, click **Apex Classes**.

3. In the *Apex Classes* page, click **New**.
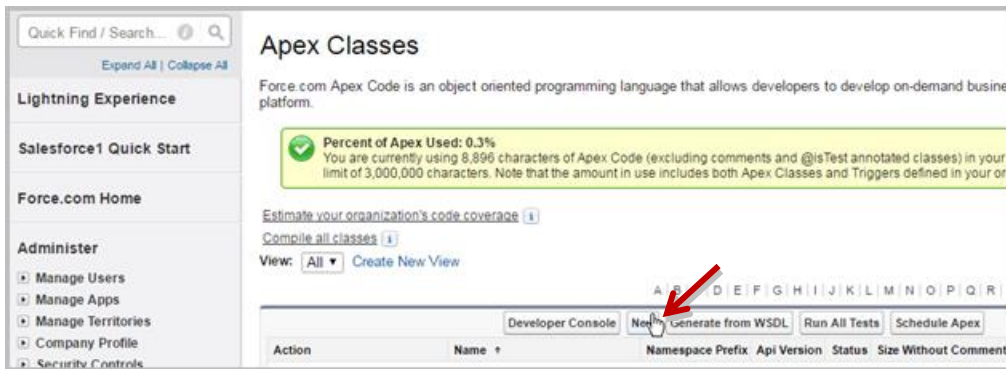
Figure 17: Click the New button

4. Open the following file on the server and copy its contents:

   C:\Program Files (x86)\AltiGen\SalesforceIntegration\Deployment \SoftphoneSearchController.cls

5. Paste the copied text into the *Apex Classes* page. Click **Save**.

Figure 18: Copy the contents of the file SoftphoneSearchController.cls into the Apex Class Edit window

Step 7: Test the Configuration

Now you can test this configuration. Log into Salesforce under a user account that you added. Switch to the *Contacts* tab, the login fields for the softphone should appear on the left.

Figure 19: Log into Salesforce, confirm that the softphone appears

Step 8: Assign Salesforce Integration Licenses to Agents
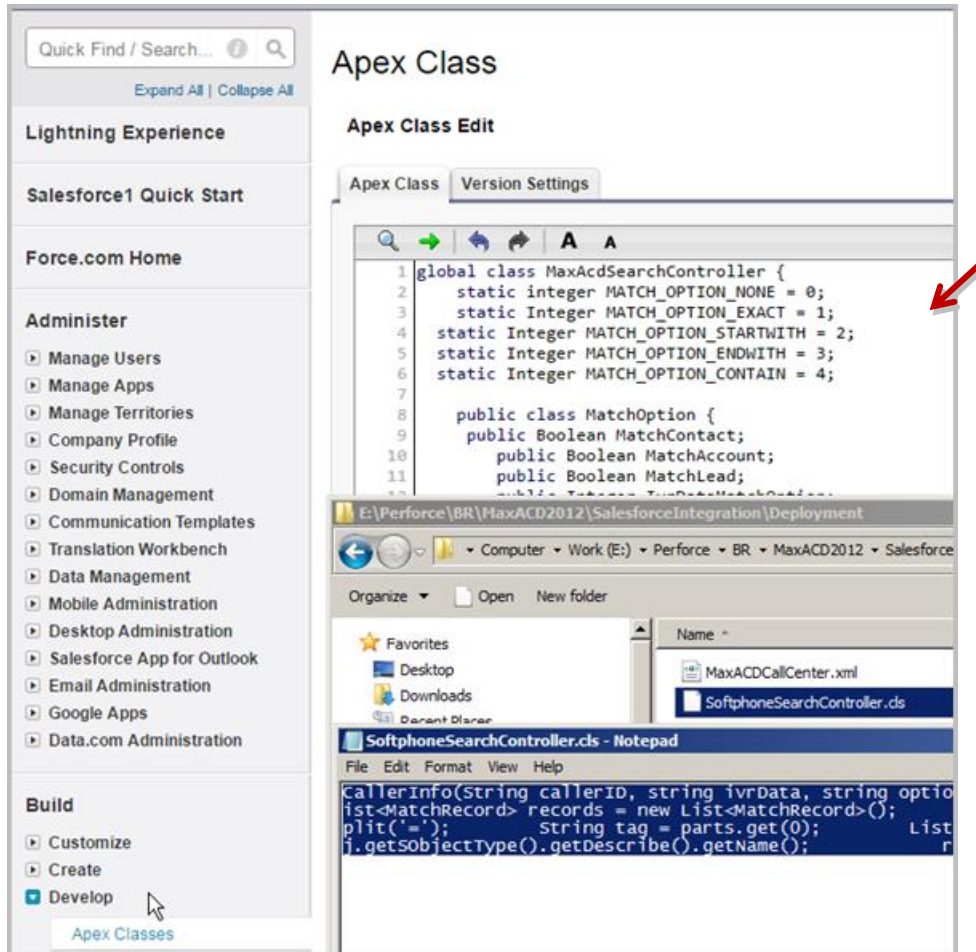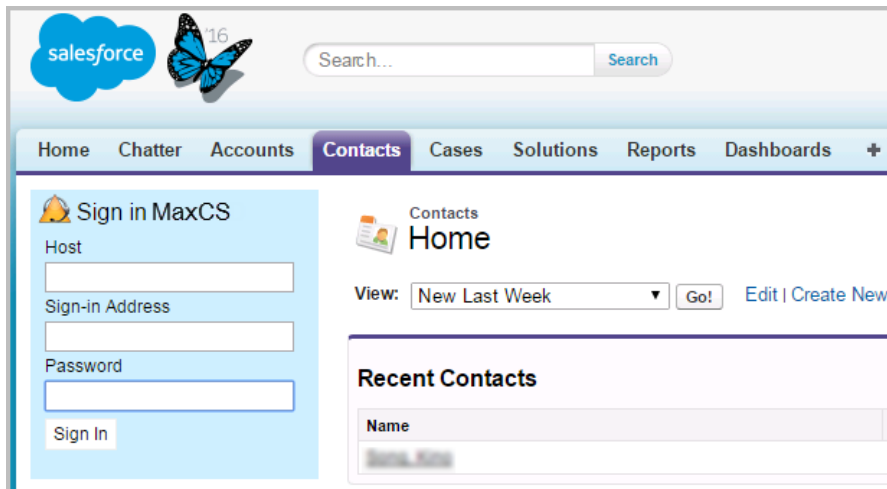
You can now assign Salesforce Integration seat licenses to individual users.

1. Log into MaxCS Administrator.

2. Select **License** > **Client SEAT License Management**.

3. Select the Salesforce Integration license on the left panel.

4. In the *Non-members* list, select the agents who will be using the Salesforce license. To make multiple se-lections, use Shift+click and Ctrl+click. Click **ADD** to move those agents to the Members list.

   The screen will show you the total number of licenses you have and the number of licenses assigned.

5. When you have finished assigning the Salesforce licenses to all appropriate users, return to Salesforce.com. Log in as one of those users to confirm the configuration:

   - For the *Host* field, enter the MaxCS server address with the port number.

   - For the *Sign-in Address* field, enter the extension.

   - For the *Password* field, enter the extension password. Click **Sign In**.
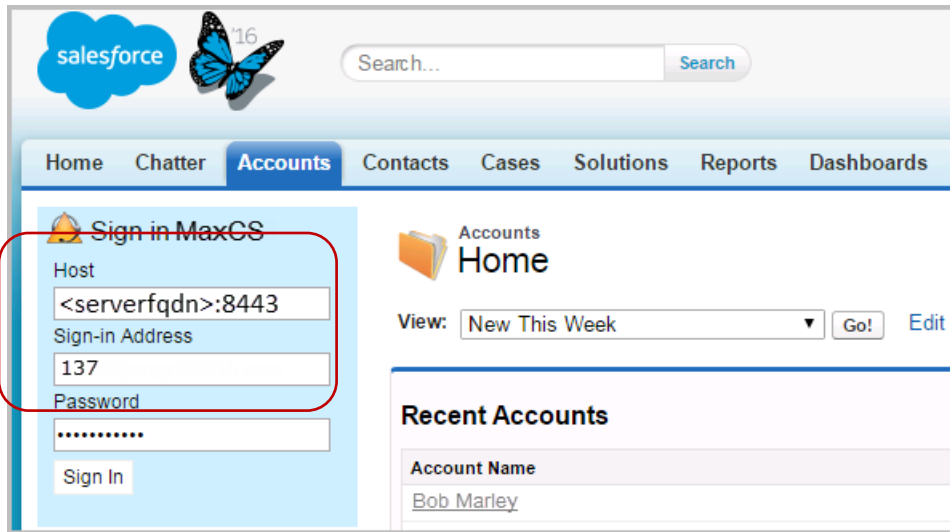
Figure 20: Log into the user account for the softphone

6. You will see an idle telephone icon after you log in.

Figure 21: Image of the softphone in the left panel

Agents can configure their accounts to permit Salesforce pop up messages. These instructions are covered in the section Configuring Screen Pop.

Limitation: The salesforce application will reload each time the user moves between the various Salesforce tabs. For example, if a user switches from the Accounts tab to the Contacts tab, the application will reload in response to that switch. If an inbound call arrives during the process of reloading the application, a screen pop may not occur. See Step 9 for instructions on how to configure the salesforce console.

Step 9: Configure IVR Data Match Entries

When a call comes in, the Salesforce Connector identifies the caller ID and any IVR data for the call. It then calls the Salesforce.com API to try to match a record in the customer database.

- Caller ID is from CO (Central Office)

- IVR data can be configured in AA page in MaxCS Administrator.

You will need to set up AA entries that will collect digits based upon a value tag and the length of the digits.
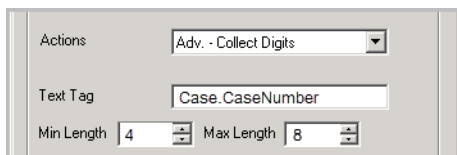
Configuration Example: Case Numbers

Salesforce.com has a page for cases. Each case has an 8-digit case number prefixed with zeros. The field name of a case number is **Case.CaseNumber**. (The general format is *tab.field*; in this instance, *Case* is the tab and *CaseNumber* is the field.)

In this case, you would open **System** > **AA Configuration** and configure an AA entry with the text tag set to **Case.CaseNumber**, and digit length set at 4 – 8 (the maximum digital length in MaxCS is 16).

If a caller entered *1234* at this AA menu, the Salesforce Connector will receive IVR data "Case.CaseNumber=1234".

The next figure illustrates how you would configure this AA entry.

Figure 22: AA entry for matching case number

You would set the parameters for the AA entry as follows:

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

You can match any Salesforce field with the Tag value, for example, you can use Contract.ContractNumber, Solution.SolutionNumber, and so on.

For descriptions of each field, refer to the *Salesforce Field Reference Guide* on this page:

https://developer.salesforce.com/docs/atlas.en-us.sfFieldRef.meta/sfFieldRef/salesforce_field_reference.htm

Step 10: Configure the Salesforce Console

In the default Salesforce web pages, some pages will not show the softphone. In addition, the application may need to reload when the user switches between tabs. Because of these issues, AltiGen strongly recommends that your agents use the *Salesforce console*.

In the Salesforce console, all detailed pages can display in tabs and the softphone appears in the bottom right corner.
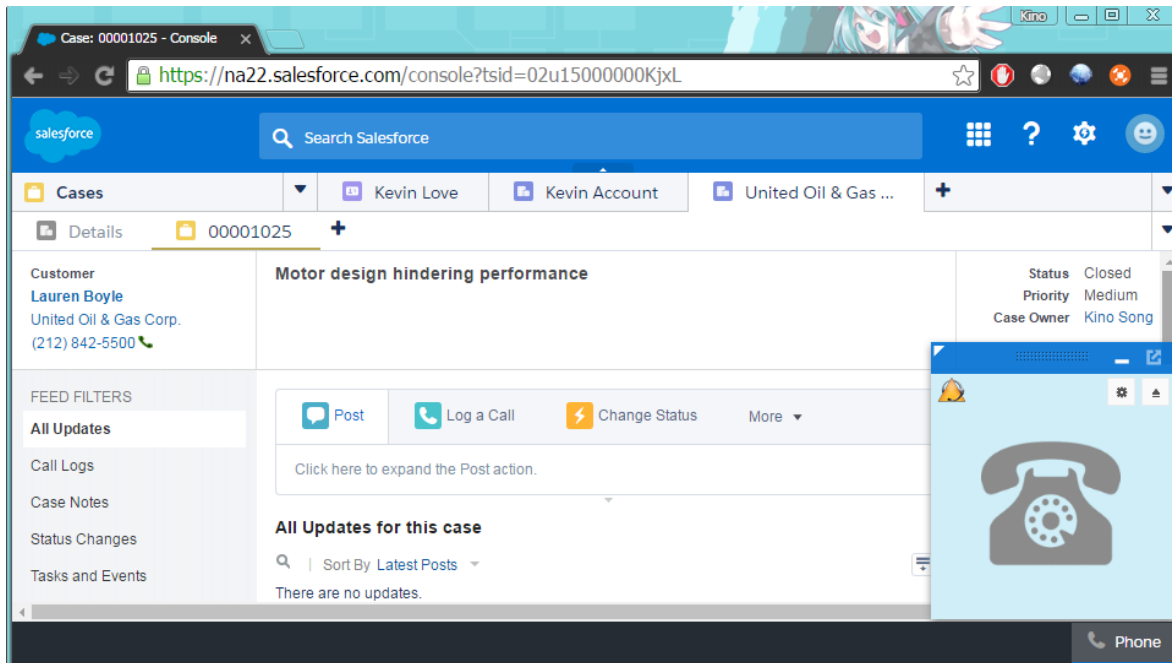
Figure 23: Example of the Salesforce Console

To learn how to set up the Salesforce Console, watch the video on this page:
http://salesforce.vidyard.com/watch/Ki1BhOiiQAbhWmFg-x4uiQ

Step 11: Agent Instructions

Once you have finished the configuration, you will need to provide your agents with the following information:

- Login URL to log into Salesforce
- Their username and password

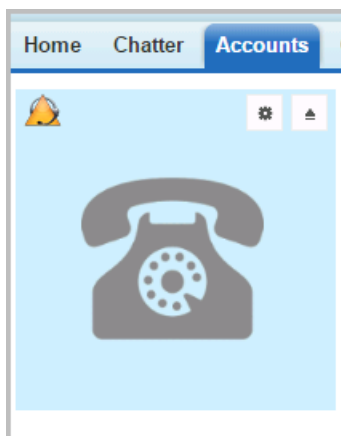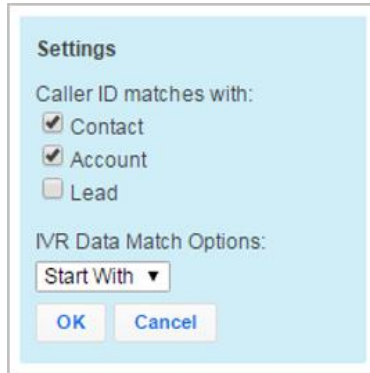Users will see an idle telephone icon after they log in.

Figure 24: The softphone

To sign out of Salesforce, users click the button above the softphone. ⏏

Users can choose what criteria to use when matching Caller ID data to existing customers, by checking or clearing checkboxes in the *Settings* section.

Figure 25: Set criteria to use when matching Caller ID data

Enabling the Salesforce Screen Pop in MaxAgent

Users must configure MaxAgent to allow Salesforce to pop up messages for inbound calls. To enable this, users perform the following steps.

1. In MaxAgent, click the **Configuration** button.

2. Choose **Alerts**.

3. Set the *Alert Type* option to **Salesforce Screen Pop**.

AltiGen Technical Support

Authorized AltiGen Partners and distributors and Direct Customers on a Direct Support Plan 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 (Tier 1 Direct Customers must call to open a case).

- Call 888-ALTIGEN, choose option **5** from the IVR, or 408-597-9000, option **5** from IVR, 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 outside of normal business hours and no one is available to answer your call.

Technical support hours are 5:00 a.m. to 5:00 p.m., PST, 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 **required** information when calling in for Support:

- Partner ID

- AltiGen Certified Engineer Tech ID

- Serial numbers for any applicable hardware (chassis, boards, and so on)

- Number and types of boards in the system, if applicable

- MaxCS version number

- Server model

- The telephone number where you can be reached