



MaxACD Release 7.1 Salesforce Connector Integration Guide

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This guide is provided for administrators who are configuring Altigen Communication's MaxACD 7.1 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

Note that the MaxGroups feature of MaxACD Release 7.1 does not support the Salesforce Connector.

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.

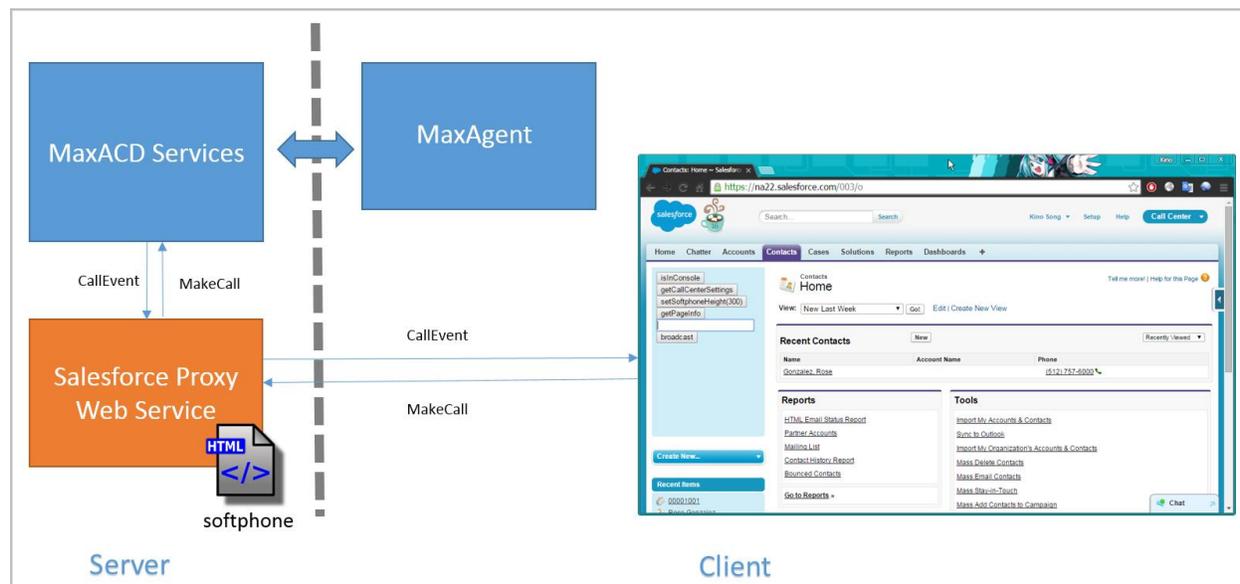


Figure 1: Overview of Salesforce integration

Requirements

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

- The MaxACD server must be running Windows Server 2012 or later
- The MaxACD server must be running IIS version 8.0 or later
- The MaxACD server must be running .Net Framework version 4.5 or later
- The MaxACD server must be running MaxACD Release 7.1 or later
- The MaxACD 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.
- You must have a Salesforce subscription that includes either the Sales Console or the Service Console. Refer to the Salesforce.com web site for details on products, licenses, and prices: <https://www.salesforce.com/editions-pricing/overview/>
- Agents who will be using Salesforce must have a MaxACD Salesforce Integration Seat license applied to their accounts
- Agents who will be using Salesforce must have the MaxAgent client application

Step 1: Install the MaxACD Salesforce Connector

To install Salesforce integration on the MaxACD server,

1. Log on to the MaxACD server.
2. In the MaxACD installation media, open the *SalesforceIntegration* folder.
3. Run the *setup.exe* program in that folder.

During the installation, we recommend that you accept the default file location; the two primary components (the softphone and the web proxy) must be in same website with the sub URL. The default file location ensures this arrangement.

4. Follow the instructions in the installation wizard.

To deploy Salesforce Connector on a separate server from the MaxACD server, see the information in the section [Deploy a Standalone Salesforce Integration Server](#) on page 19.

Step 2: Configure IIS

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

If you do not already have a valid public 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 MaxACD 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.

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 MaxACD server. Double-click **Server Certificates**.

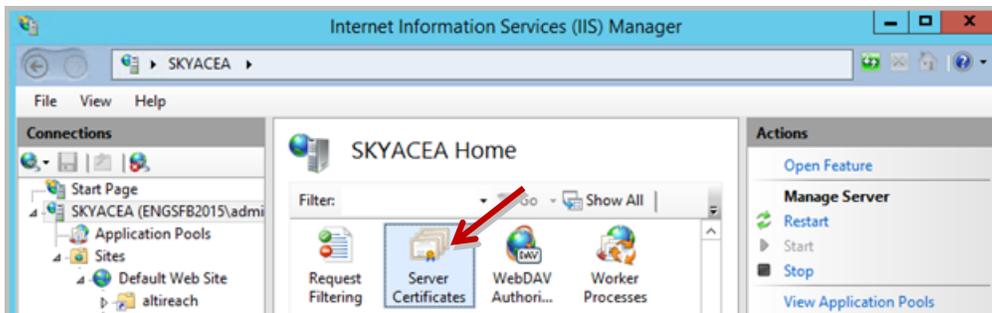


Figure 2: Double-click Server Certificates in IIS

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



Figure 3: 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**.

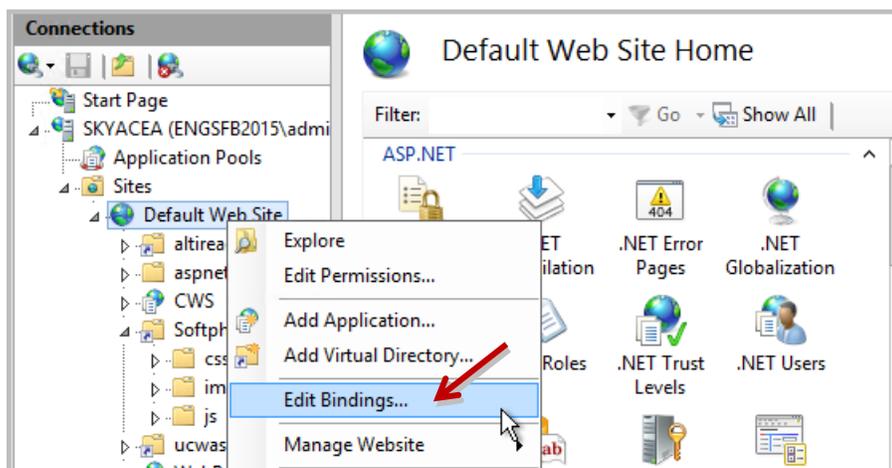


Figure 4: Edit bindings for the web site

6. In the Site Bindings panel, click **Add**.
7. 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 **443**.
 - For the *SSL certificate* field, select the certificate that you just imported.
 - Leave the other fields as they are. Save your settings.

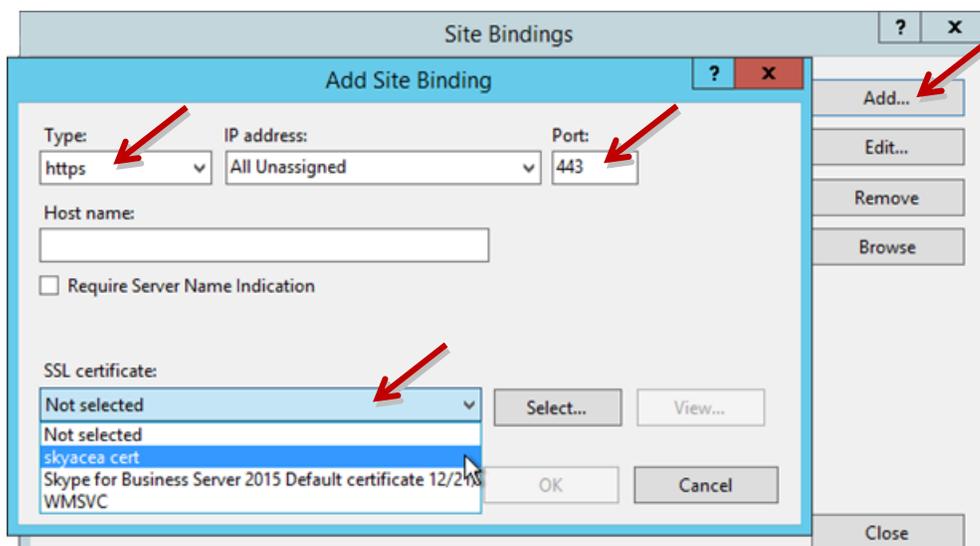


Figure 5: Select the certificate that you imported

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.

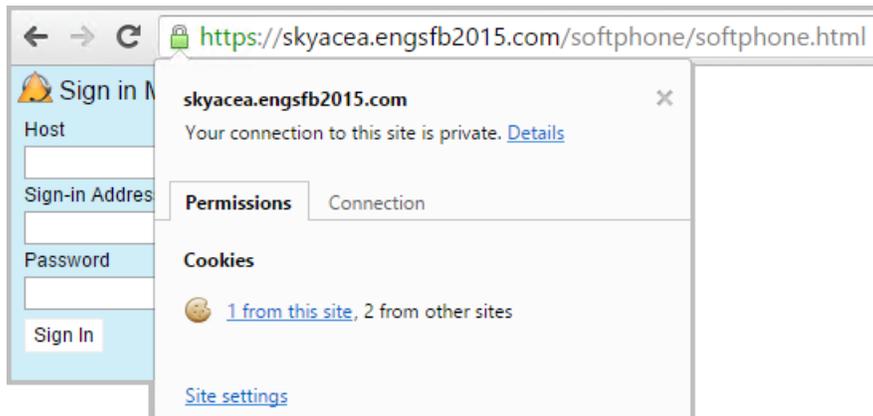


Figure 6: Make sure that the certificate is accepted as valid

Step 3: Import a MaxACD Call Center into Salesforce

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

1. Log into Salesforce.com with administrator privileges. Click **Setup** near the top of the page.

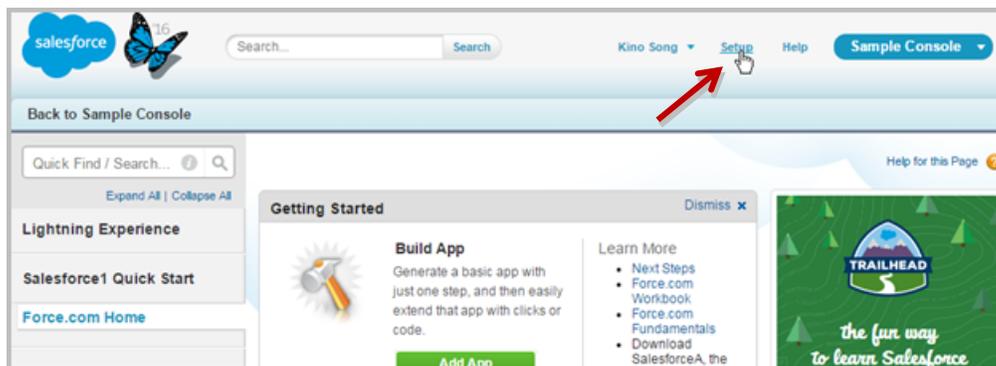


Figure 7: Log in and click Setup

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

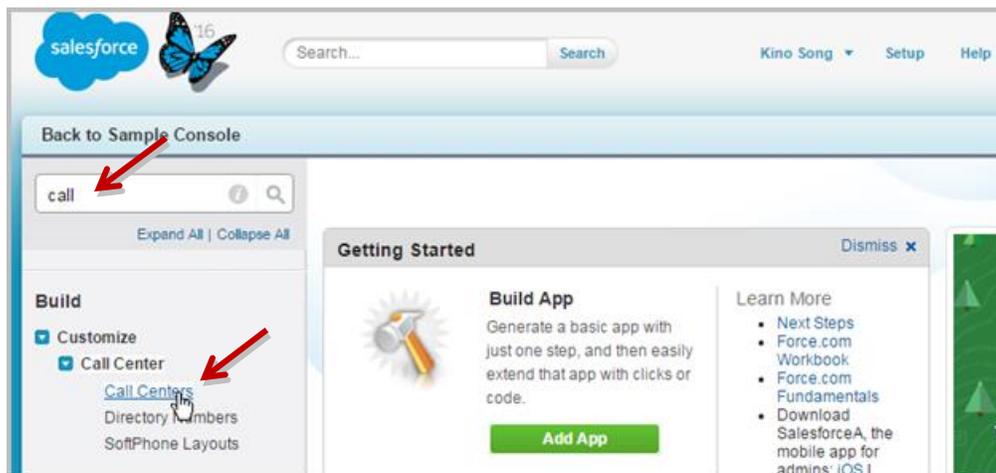


Figure 8: Search for Call and then click Call Centers.

3. Click **Continue**.

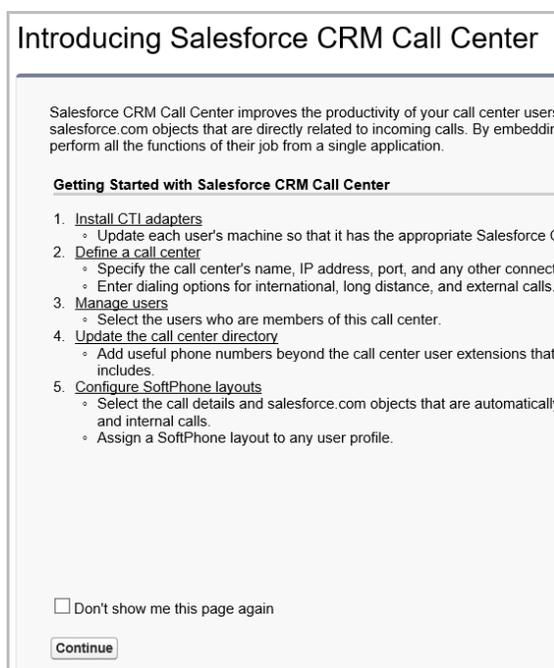


Figure 9: Click Continue

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



Figure 10: Click Import

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

C:\Program Files (x86)\Altigen\SalesforceIntegration\Deployment\MaxACDCallCenter.xml

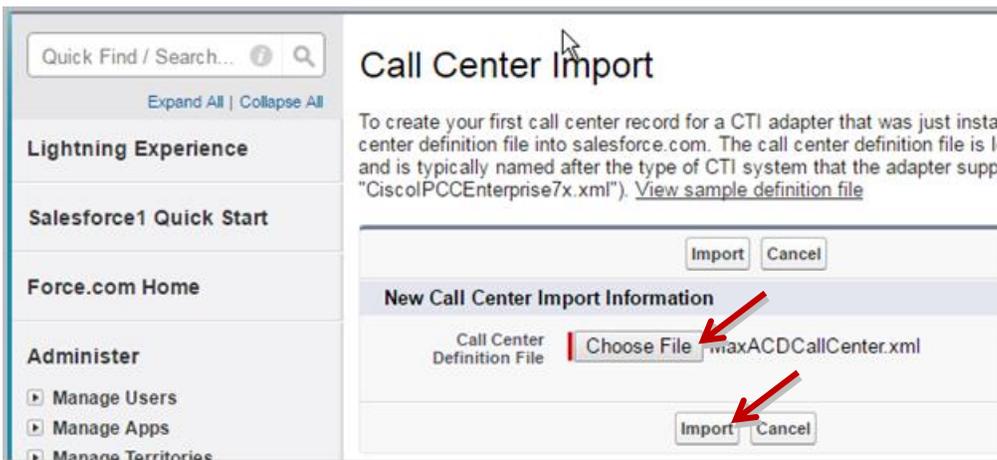


Figure 11: Choose the file "MaxACDCallCenter.xml"

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



Figure 12: Click Edit beside the entry "MaxACD Call Center"

- On the *Call Center Edit* panel, edit the *CTI Adapter URL* field by replacing the placeholder "localhost" with the Salesforce Integration server FQDN. Click **Save**.

Call Center Edit
MaxACD Call Center
All Call Centers » MaxACD Call Center

Call Center Edit [Save] [Cancel]

General Information

InternalName	MaxACDCallCenter
Display Name	MaxACD Call Center
CTI Adapter URL	https://localhost/softphone/sc
Use CTI API	true
Softphone Height	200

Figure 13: Edit the URL by entering the MaxACD server FQDN

Step 4: Add Users to the MaxACD Call Center

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

- Click **Manage Call Center Users**.

Call Center Detail [Edit] [Delete] [Clone]

General Information

InternalName	MaxACDCallCenter
Display Name	MaxACD Call Center
CTI Adapter URL	https://localhost/softphone/sc
Use CTI API	true
Softphone Height	200
Softphone Width	200

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

Figure 14: 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 5: Import Apex

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

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

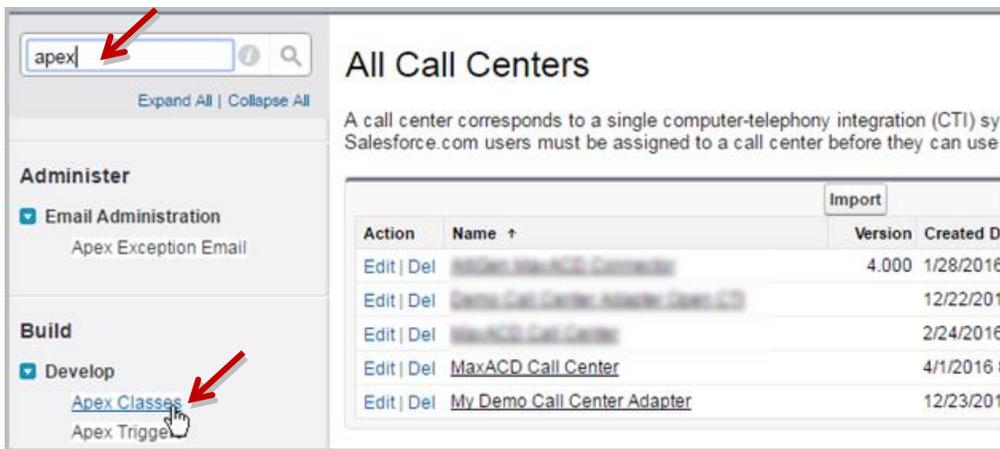


Figure 15: Click the "Apex Classes" link

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



Figure 16: 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

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

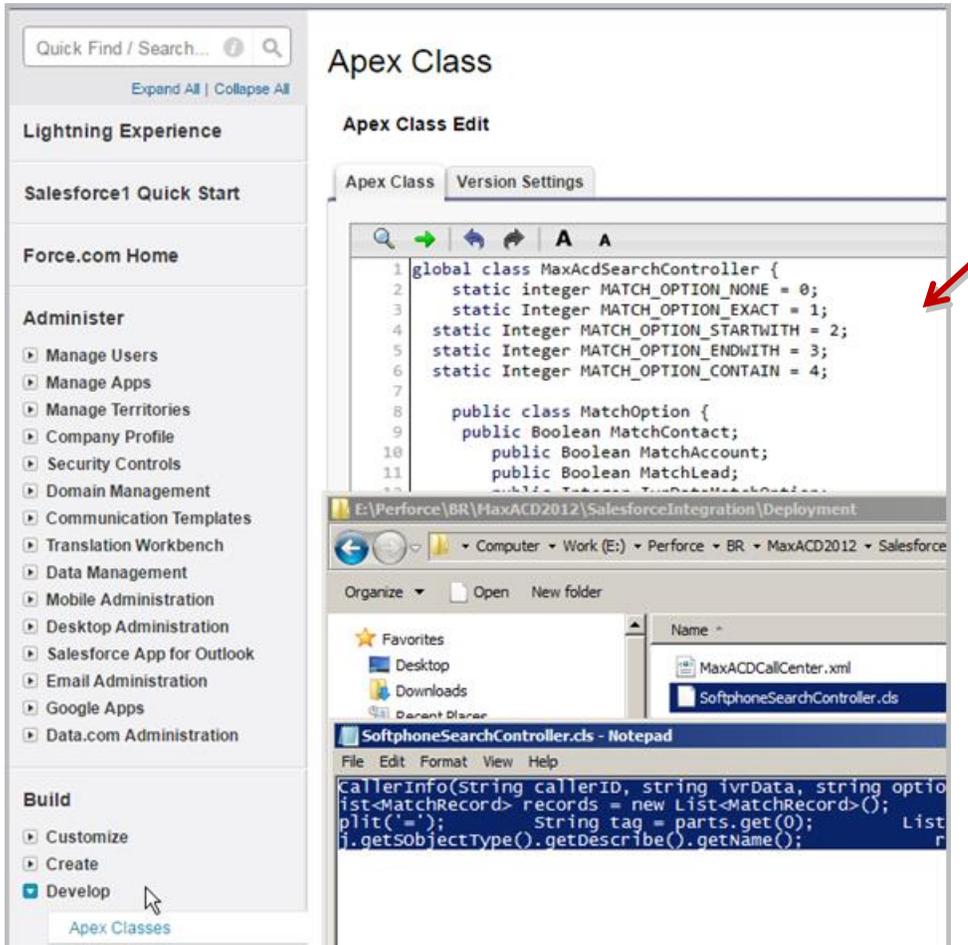


Figure 17: Copy the contents of the file *SoftphoneSearchController.cls* into the Apex Class Edit window

Step 6: 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.

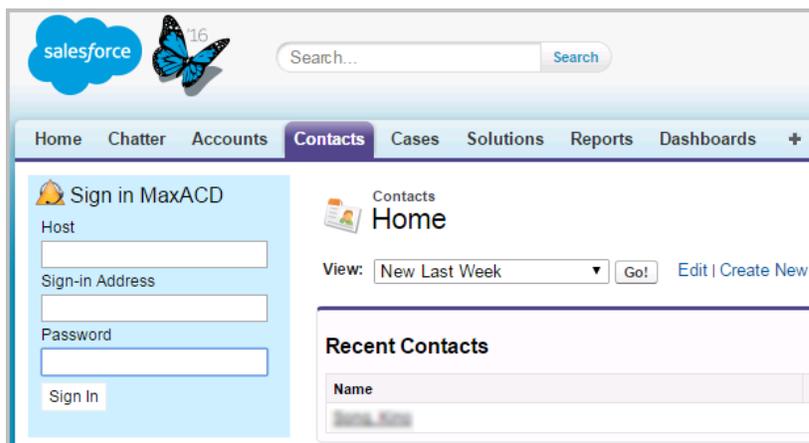


Figure 18: Log into Salesforce, confirm that the softphone appears

Step 7: Assign Salesforce Integration Licenses to Agents

You can now assign Salesforce Integration seat licenses to users in MaxACD Administrator.

1. Log into CWS (the MaxACD Administrator portal). To confirm that you have Salesforce Integration Seat licenses in your account, click **License**.

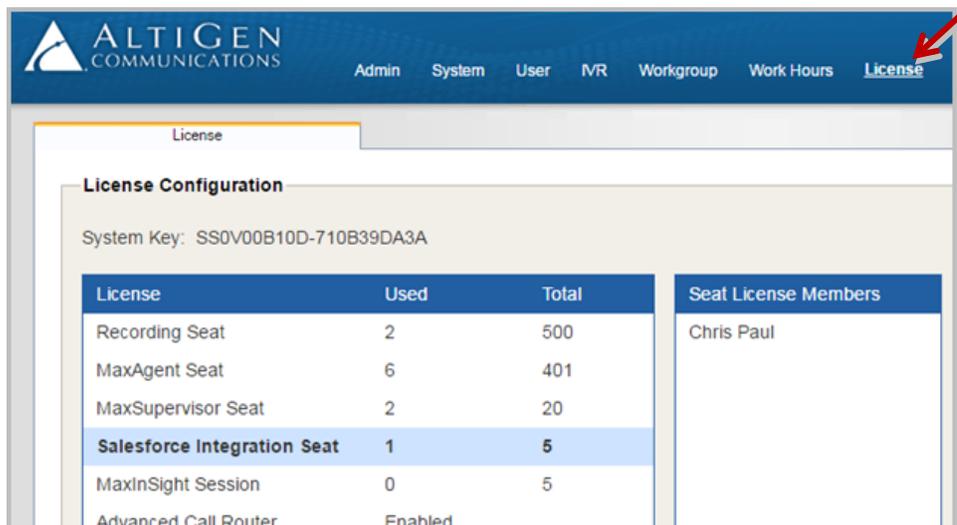


Figure 19: In the MaxACD Administrator portal, click License

2. The License page shows an overview of the licenses used and total licenses. You should see the Salesforce Integration Seat license on that list.

If you do not see that license, or if all of those licenses show as *Used*, then you must acquire more seat licenses; contact your Altigen sales representative to obtain the appropriate licenses.

3. After you determine that you have sufficient Salesforce Integration Seat licenses, assign them to the appropriate users. Follow these steps for each user:
 - a. Select **User > General**.

- b. Select the user name on the left.
 - c. On the right, in the *License Assignment* section, check the option **Assign Salesforce Integration License**. Click **Ok**.
4. 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 Salesforce Integration server address (either the IP address or FQDN).
 - For the *Sign-in Address* field, enter the username.
 - For the *Password* field, enter the user password. Click **Sign In**.

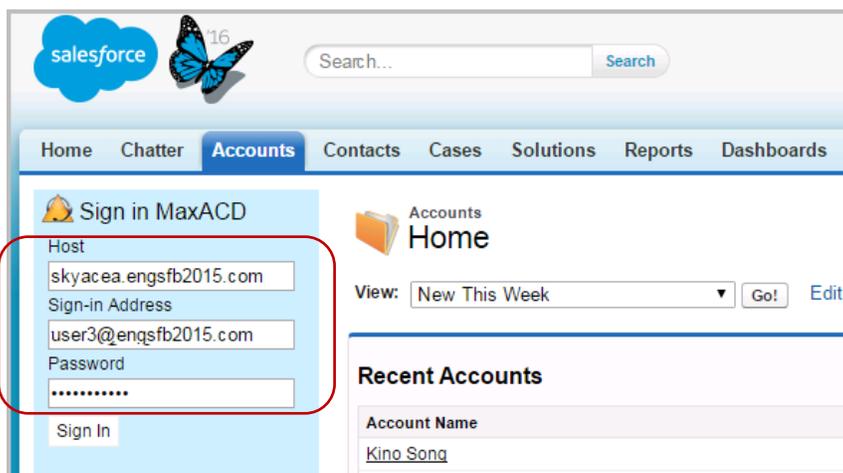


Figure 20: Log into the user account for the softphone

5. 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 [Enabling the Salesforce Screen Pop in MaxAgent](#) on page 18.

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 8: 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 IVR page in CWS (MaxACD Configuration Portal).

You will need to set up IVR entries that will collect digits based upon a value tag and the length of the digits.

The format for the Text Tag is *tab.field* (for example, *Case.Casenumber* is the tab *Case* and the field *Casenumber*).

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 configure an IVR entry with the text tag set to **Case.CaseNumber**, and digit length set at 4 – 8 (the maximum digital length in MaxACD is 16).

If a caller enters 1234 at this IVR menu, the Salesforce Connector will receive IVR data “Case.CaseNumber=1234”.

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

The screenshot shows the MaxACD configuration interface. On the left is a tree view with the following items: 0 Level - Expand Tree (System), 0 No Action, 1 Adv - Collect Digits (Collect Case Number), & Call - To Group PM, 2 No Action (2), 3 No Action, 4 No Action, 5 No Action, 6 No Action, 7 No Action, 8 No Action, 9 No Action, T Call - To Group RD wg, & No Action, * Level - Repeat Current Level, and # VM - Mailbox Access. The main configuration area is titled 'IVR' and includes the following fields: Name (System), Media Type (Voice), and an Add Media button. Below this is the 'Configuration' section for 'Item 01'. The Item Name is 'Collect Case Number'. The Prompt is 'phrase0291'. There are checkboxes for 'Set Session Priority' (set to 5) and 'Set Skill Level Requirement' (set to 5). The 'Actions' dropdown is set to 'Adv - Collect Digits'. The 'Text Tag' is 'Case.CaseNumber'. The 'Minimum Length' is 4 and the 'Maximum Length' is 8. Below these are 'PSTN Call Inter-Digit Timeout' (7) and 'Inter-Digit Timeout After Max Length' (0). A note at the bottom states: 'IVR will go to the next level after collecting enough digits.'

Figure 22: IVR entry for matching case number

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

- Set *Actions* to **Adv. – Collect Digits**
- Set *Text Tag* to **Case.CaseNumber** (the format is *tab.field*)
- 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 9: 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.

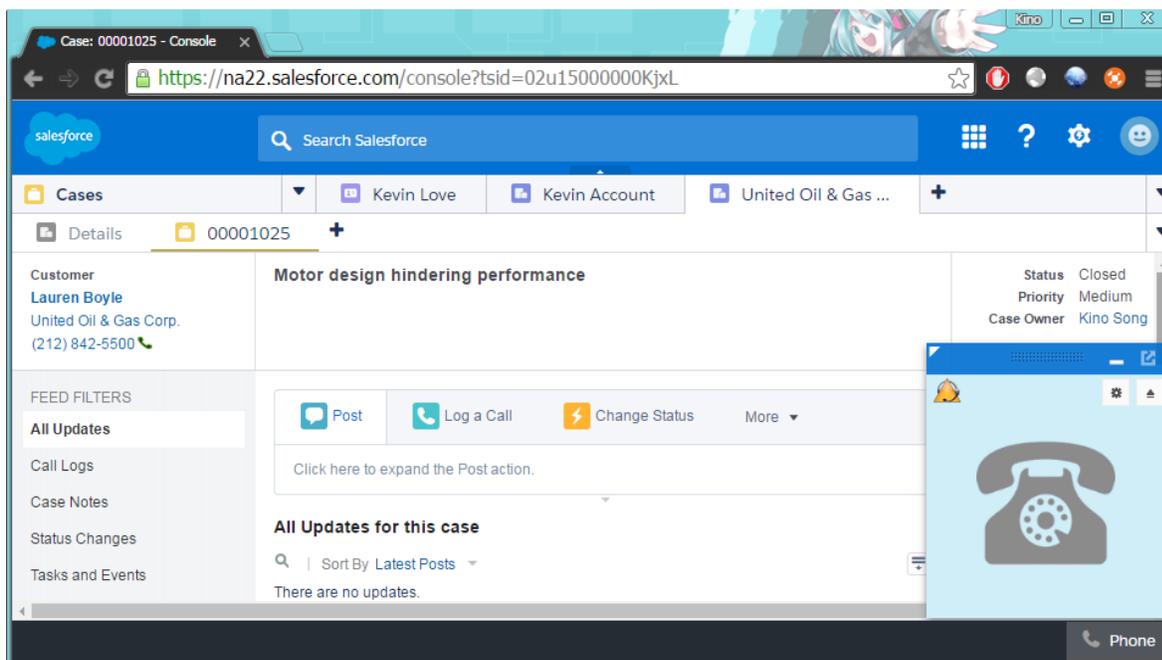


Figure 23: Example of the Salesforce Console

To learn how to set up the Salesforce Console, watch the video on this page:

<http://salesforce.vidyard.com/watch/Ki1BhOiiQAbhWmFg-x4uiQ>

Step 10: For Redundant Deployments

Please note the following changes if you have configured redundancy in MaxACD:

- Install the Salesforce Connector on both MaxACD servers.
- In the Salesforce Call Center definition, configure the *CTI Adapter URL* field to be the primary server address.
- When a switchover occurs, go into Salesforce and change the *CTI Adapter URL* field to the secondary server address. After this is done, have all Salesforce agents refresh their Salesforce pages.

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.

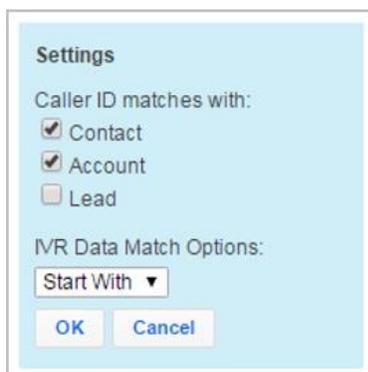


Figure 25: Set criteria to use when matching Caller ID data

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**.

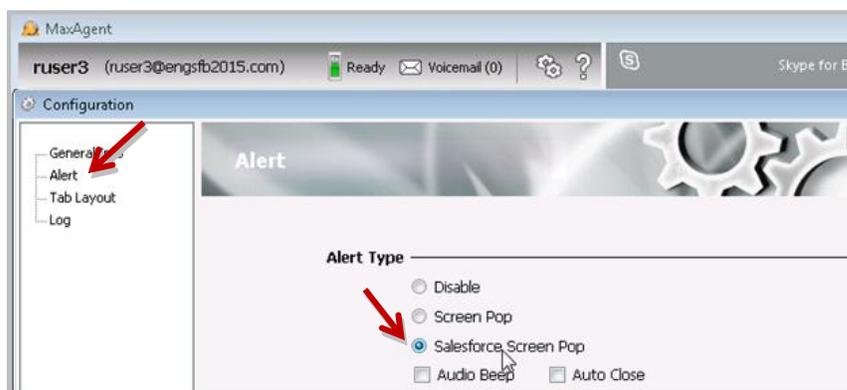


Figure 26: Enable Salesforce screen pops in MaxAgent

Salesforce Lightning Experience Integration

If you are using the Lightning Experience, you need to create a Lightning app to enable the softphone.

1. Log into Salesforce.com with administrator privileges. Click **Setup** near the top of the page.
2. Use the *App Manager* to create a new Lightning app that uses Console Navigation. Optionally, you could also choose to enable *Service Setup*.
3. Add the Open CTI Softphone to your utility bar.
4. Add the navigation items that you want.
5. Assign the app to the user profiles for those users whom you want to access the app.

When you launch your new Lightning app, the softphone will look similar to the following figure:

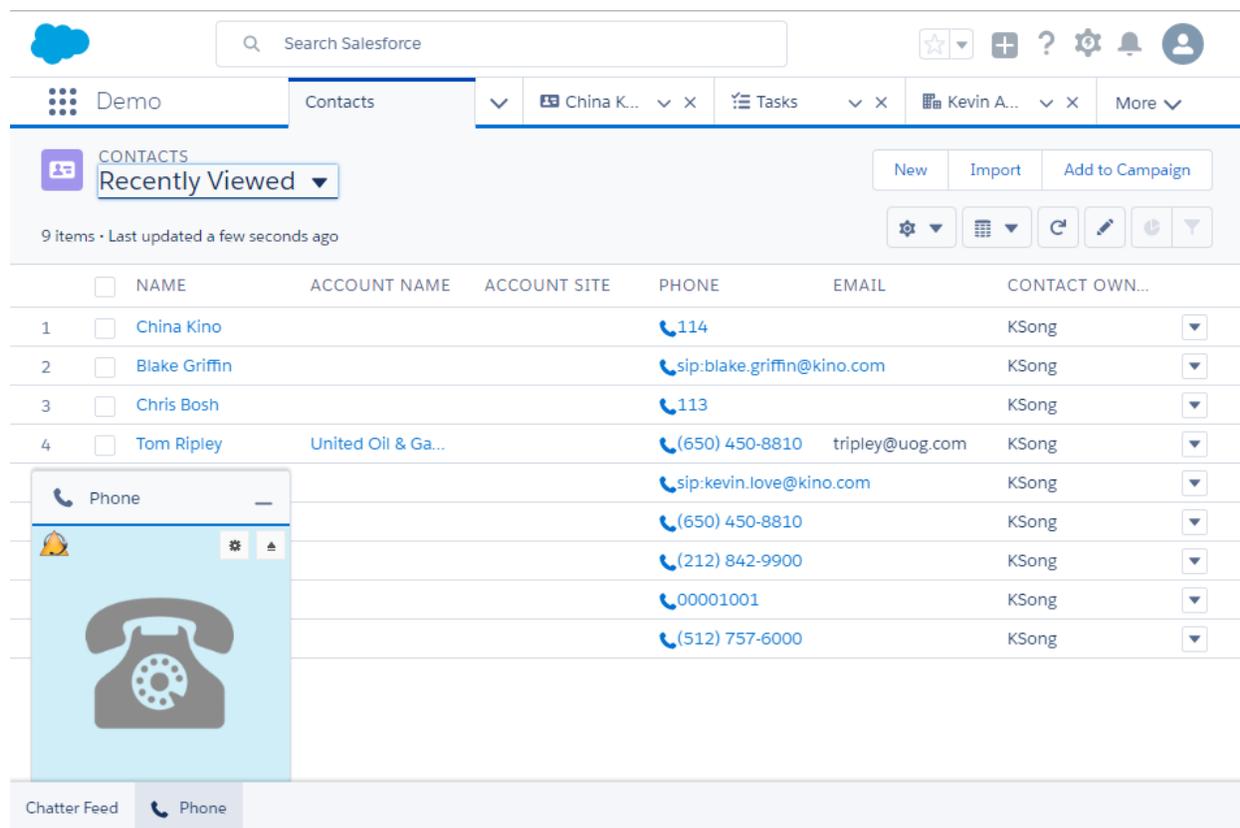


Figure 27: The softphone from the new Lightning app

Note that if you have a previous version of Salesforce Connector deployed, then you will need to re-import the Call Center to enable Lightning support.

Deploy a Standalone Salesforce Integration Server

Salesforce Integration can be deployed on a separate server from the MaxACD server.

To deploy it on a separate server, you must perform an additional step after you perform the installation steps in this guide:

Modify the ALTISERV_ADDRESS in C:\Program Files (x86)\AltiGen\SalesforceIntegration\WebProxy\Web.config to be the address of your MaxACD server.

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://mspartner.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
- MaxACD version number
- The telephone number where you can be reached

Be prepared to answer the following questions:

- Is this a virtual or a standalone server installation?
- If this is a virtual installation, it is installed in VMware environment or Hyper-V? What is the version number of the virtual server?
- How much memory and how many CPU's are reserved for MaxACD Server use? Memory and CPU cores should always be dedicated and reserved for MaxACD Server use exclusively.
- Are SSD drives installed? If not, be prepared to describe what NAS devices are installed and whether they are shared or dedicated to the MaxACD server.