GETTING STARTED WITH SETTING UP CALL CENTERS

Summary

Salesforce CRM Call Center improves the productivity of your call center users by providing fast and easy access to accounts, contacts, cases, and other Salesforce objects that are directly related to incoming calls. By embedding a SoftPhone within the Salesforce user interface, Salesforce CRM Call Center allows your users to perform all the functions of their job from a single application.

Installing CTI Adapters

Any machine that uses Salesforce CRM Call Center must have a computer-telephony integration (CTI) adapter installed for the type of CTI system that is in use. The CTI adapter acts as an intermediary between the third-party CTI system, Salesforce, and a Salesforce CRM Call Center user.

The minimum system requirements for a CTI adapter are:

- For adapters built with CTI version 4.0 or higher:
  - Microsoft® Internet Explorer® 8; Mozilla® Firefox® 3.5; Apple® Safari® 4; Google Chrome™ 10.0 (Internet Explorer 11 isn't supported)
  - Microsoft Windows® XP (with Microsoft .NET framework)

- For adapters built with previous versions of CTI:
  - Internet Explorer 7 or 8; Firefox 3.5 or 3.6 (Safari, Chrome, and Internet Explorer 11 aren't supported)
  - For Windows 7 32-bit, 32-bit Internet Explorer 8; Firefox 3.5 or 3.6
  - For Windows 7 64-bit, 64-bit Internet Explorer 8; Firefox 3.5 or 3.6
  - 256 MB of RAM (512 MB recommended)
  - 20 MB of disk space minimum
  - Intel® Pentium® II processor, 500 MHz or above
  - Windows XP

To install a CTI adapter:

1. Visit the AppExchange to download an adapter that can work with your third-party CTI system.

2. Run the CTI adapter's `Setup.exe` application as a Windows administrator.

📝 Note: Developers build adapters using the CTI Toolkit. Different versions of the CTI Toolkit provide users with different Salesforce CRM Call Center functionality.

Creating a Call Center

A call center corresponds to a single instance of a CTI system at your organization.

To create your first call center for a CTI adapter that was just installed:

1. In Salesforce, from Setup, enter `Call Centers` in the `Quick Find` box, then select **Call Centers**.

2. If the Introducing Salesforce CRM Call Center splash page appears, click **Continue**.

3. Click **Import**.

4. Next to the `Call Center Definition File` field, click **Browse** to navigate to the default call center definition file in your CTI adapter installation directory. This XML file is named after the type of CTI system that the adapter supports. For example, the Cisco™ IPCC Enterprise adapter's default call center definition file is named `CiscoIPCCEnterprise7x.xml`. Click **Open** to enter the path in the `Call Center Definition File` field.

5. Click **Import**.

6. Click **Edit** next to the name of the new call center to make any additional changes.

To create additional call centers for a particular CTI adapter:

1. In the Call Centers list page, click the name of a call center that uses the same CTI adapter as the call center that you want to create.

2. Click **Clone**.

3. Specify a unique value for `Internal Name`. This name identifies the new call center record in Salesforce and is limited to 40 alphanumeric characters. It must start with an alphabetic character.

4. Make any additional changes to the new call center as necessary.

5. Click **Save**.

Assigning Users to a Call Center

Salesforce users must be assigned to a call center before they can use a SoftPhone.

To assign users to a call center:

1. From Setup, enter `Call Centers` in the `Quick Find` box, then select **Call Centers**.

2. Click the name of the call center to which you want to assign users.

3. In the Call Center Users related list, click **Manage Call Center Users**.

4. Click **Add More Users**.

5. Specify criteria to find the users who should be assigned to the call center.

6. Click **Find**. All users who already belong to a call center are excluded from search results because a user can only be assigned to one call center at a time.

7. Select the checkbox next to each user who should be assigned to the call center and click **Add to Call Center**.

> Note: To change a user's call center, first remove him or her from their current call center and then add him or her to the new call center. You can view a user's call center on the User detail page.

Adding Directory Numbers

Every call center includes a directory that lists the phone number of every user assigned to the call center. You can customize call center directories by adding additional directory numbers, either to a single call center or to all defined call centers in your organization. If you have a large number of directory numbers to define, use the Lightning Platform Data Loader to create them in one step. See "What is the Lightning Platform Data Loader?" in the online help.

To add a custom directory number:

1. From Setup, enter *Directory Numbers* in the Quick Find box, then select **Directory Numbers**.

2. Click **New**.

3. In the Name field, enter a label that identifies the directory number.

4. In the Phone field, enter the phone number, including any international country codes. Dialing prefixes, such as 9 or 1, do not need to be included.

5. In the Call Center field, select the call center directory to which you want to add the new number. To add the number to every call center in your organization, choose -- Global --.

6. Optionally, in the Description field, enter text that provides further information about the additional directory number.

7. Click **Save**.

Customizing SoftPhone Layouts

Similar to page layouts, you can design custom SoftPhone layouts and assign them to call center users based on their user profile.

To define a custom SoftPhone layout:

1. From Setup, enter *SoftPhone Layouts* in the Quick Find box, then select **SoftPhone Layouts**.

2. Click **New**.

3. In the Name field, enter a label that uniquely identifies your layout.

4. In the Select Call Type picklist, choose the type of call for which the currently displayed SoftPhone layout should be used. A single SoftPhone layout definition allows you to specify different layouts for inbound, outbound, and internal calls.

5. In the Display these call-related fields section, click **Edit** to add, remove, or change the order of fields that are directly related to a phone call, such as the number of the caller or the number that was dialed.

6. In the Display these Salesforce objects section, click **Add/Remove Objects** to add, remove, or change the order of links to call-related objects.

7. Below the list of selected objects, click **Edit** next to each If single <Object> found, display row to specify the fields that should be displayed if a single record of that type is the only record that is found.

8. In the Screen Pop Settings section (for inbound call types), click **Edit** next to each type of record-matching row to specify which screens should display when the details of an inbound call

match or don't match existing records in Salesforce. The following table describes each record-matching row and its screen pop options:

Record-Matching Row	Description	Screen Pop Options
`Screen pops open within`	Use to set where screen pops display.	**Existing browser window** Select to display in open browser windows. **New browser window or tab** Select to display in new browser windows or tabs. Users' browsers may handle these settings differently: • Internet Explorer 6.0 always displays screen pops in new windows. • Internet Explorer 7.0 displays screen pops based on what users select in its tabs settings. • Firefox 3.5 displays screen pops based on what users select in its tabs settings.
`No matching records`	Use to set the screen pop options for when the details of an inbound call don't match any existing Salesforce records.	**Don't pop any screen** Select if you don't want any screen to display. **Pop to new** Select to display a new record page you specify from the dropdown list. **Pop to Visualforce page** Select to display a specific Visualforce page. The CTI adapter passes data from the call to the Visualforce page via a URL. This includes at least `ANI` (the caller ID) and `DNIS` (the number that the caller dialed). The URL can pass more data to the Visualforce page if necessary.
`Single-matching record`	Use to set the screen pop options for when the details of an inbound call match one existing Salesforce record.	**Don't pop any screen** Select if you don't want any screen to display. **Pop detail page** Select to display the matching record's detail page. **Pop to Visualforce page** Select to display a specific Visualforce page. The CTI adapter passes data from the call to the Visualforce page via a URL. This includes at least `ANI` (the caller ID) and `DNIS` (the number that the caller dialed). The URL can pass more data to the Visualforce page if necessary.

Record-Matching Row	Description	Screen Pop Options
`Multiple-matching records`	Use to set the screen pop options for when the details of an inbound call match more than one existing Salesforce record.	**`Don't pop any screen`** Select if you don't want any screen to display. **`Pop to search page`** Select to display a search page. **`Pop to Visualforce page`** Select to display a specific Visualforce page. The CTI adapter passes data from the call to the Visualforce page via a URL. This includes at least `ANI` (the caller ID) and `DNIS` (the number that the caller dialed). The URL can pass more data to the Visualforce page if necessary.

To hide expanded record-matching rows, click **Collapse**.

9. Configure layouts for any remaining call types in the `Select Call Type` list.

10. Click **Save**.

To assign a custom SoftPhone layout to a user profile:

1. From Setup, enter *`SoftPhone Layouts`* in the `Quick Find` box, then select **SoftPhone Layouts**.

2. Click **Layout Assignment**.

3. For each user profile that appears on the page, select the SoftPhone layout that the profile should use. Profiles are only listed in this page if they include users that are currently assigned to a call center, or if they have already been assigned a custom SoftPhone layout. The number in parentheses shows the number of call center users who are assigned to that profile.

4. Click **Save**.