



# USING THE SALESFORCE CRM CALL CENTER DEMO ADAPTER

## Setting Up the Demo Adapter

Customers and partners can use the demo adapter to preview Salesforce CRM Call Center functionality. Developers can use the demo adapter's source code to quickly prototype new SoftPhone features or as a template for a new CTI connector implementation.

To install and set up a Salesforce CRM Call Center demo adapter:

1. Download the demo adapter installation package from [https://developer.salesforce.com/page/CTI\\_Toolkit#Demo\\_Adapter\\_3](https://developer.salesforce.com/page/CTI_Toolkit#Demo_Adapter_3).
2. From the demo adapter's installation directory, run `Setup.exe` as a Windows administrator user.
3. Log in to Salesforce as an administrator user.
4. From Setup, enter *Call Centers* in the `Quick Find` box, then select **Call Centers**.
5. Click **Import**.
6. Click **Browse** and navigate to the call center definition file in your demo adapter installation directory. In default installations, this file is located at `C:\Program Files\salesforce.com\Demo Adapter\DemoAdapter.xml`.
7. Click **Import**.
8. Click **Demo Call Center Adapter**.
9. Click **Manage Call Center Users**.
10. Click **Add More Users**.
11. Enter search criteria to find a Salesforce user who can be a demo adapter user. Click **Find**.
12. Select the checkbox next to the name of one or more users who should have access to the demo adapter. Click **Add to Call Center**.
13. Log in to Salesforce as a demo adapter user.
14. Log in to the SoftPhone. The demo adapter's login screen accepts any values as valid credentials.

## Using the Demo Adapter

Once you have logged in to the demo adapter you can use it like a normal SoftPhone.

To trigger a CTI system event while you are using the demo adapter SoftPhone:

1. Right-click the CTI adapter system tray icon in the lower right corner of your computer screen.
2. Select **Go To Wrapup After Call** if you want to view wrap-up reasons after ending a demo call.
3. Select one of these demo CTI system events:
  - **Call From 415-555-1212**—An inbound call from (415) 555-1212 that does not include interactive voice response (IVR) data
  - **Call Via IVR (Case 1001)**—An inbound call from (415) 555-1212 that includes IVR data identifying case 1001
  - **Transfer From x8120**—A call that has been transferred from another call center user at extension x8120
  - **Conference From x8120**—A conference request from another call center user at extension x8120

### Sounds

When the demo adapter receives a call, your computer plays a ring tone. When the demo adapter initiates a call via click-to-dial, your computer plays a dialing sound.

### Hot Keys

Press Winkey-Shift-Z to initiate a call from 415-555-1212. Press Winkey-Shift-X to initiate a call about case 1001.

## Customizing the Demo Adapter

You can customize the demo adapter system tray menu and the logo that displays at the bottom of the SoftPhone by modifying `demo_menu.xml` in the installation directory:

- To customize the first system tray menu item, edit the menu item label or automatic number identification (ANI) attributes in the following line: `<ITEM ID="MENU_CALL_FROM_PHONE" LABEL="Call From 415-555-1212" ANI="4155551212"/>`
- To customize the second system tray menu item, edit the menu item label, ANI, search field, or search value attributes in the following line: `<ITEM ID="MENU_CALL_FROM_IVR" LABEL="Call Via IVR (Case 1001)" ANI="4155551212" SEARCHFIELD="Case.CaseNumber" SEARCHVALUE="00001001"/>`

Note that for the `SEARCHFIELD` attribute, any object-field pair can be used. For example, `Case.CaseNumber`, `Account.AccountNumber`, and `Support_Program__c.Program_Number__c` are all valid.

- To customize the SoftPhone logo, edit the image URL in the following line: `<LOGO IMAGE_URL="https://yourInstance.salesforce.com/servlet/servlet.ImageServer?oid=00D000000000062&id=015300000007JX6"/>`

### Logo Image

To ensure that SoftPhone logo images are available on any machine, save your logo image as an externally available document in the Documents tab of any Salesforce organization.