

Salesforce Admin Guide

This document describes how to perform the post-installation setup for integrating the Puzzel application within Salesforce. Here it is assumed that the Puzzel application has been installed as advised.

Post Installation Setup

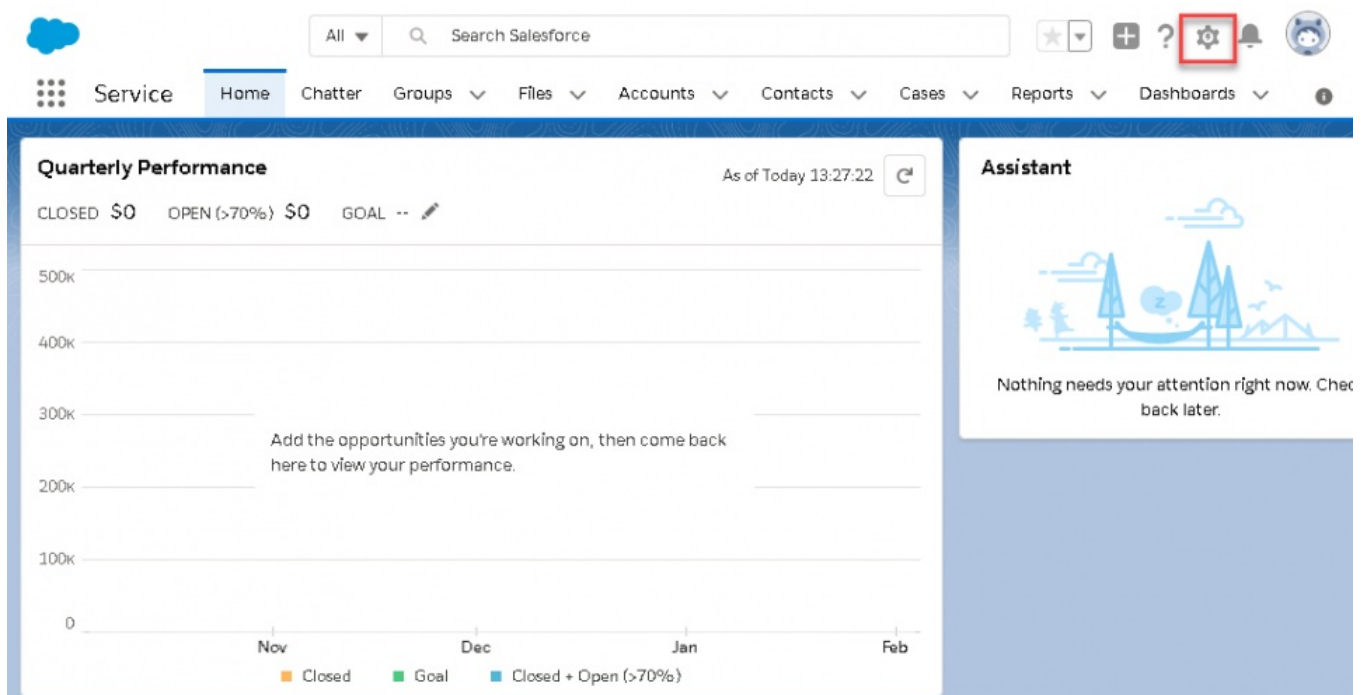
This section describes the steps that need to be done to set up the Puzzel Application within Salesforce. There are 5 essential steps to achieve this:

1. Admin Portal configuration
2. CallCenter configuration
3. Softphone layout definition
4. Adding phone capability to the utility bar.
5. Add Enquiry log component and customize it.

Admin Portal configuration

A separate web page is created for each user interface component within Salesforce and is owned by it. You need to call Puzzel to save this URL in the Admin portal for your solution.

1. To retrieve the URL, login into Salesforce and click on the **Setup** option in the top ribbon menu and select **Service Setup**.



2. Type Visualforce in the quick find tab and click on the result. You will see an entry for Puzzel Agent Application if it has been successfully installed. Click on the popout button as shown in the picture to open the Puzzel Agent page in a new window. Only for versions 1.8.x you should select Visualforce page with Lwc at the end.
Example: <https://{domain}/apex/puzzelAgentPageLwc>

Visualforce Pages

Visualforce Pages provide a robust and easy to use mechanism to create new and exciting user experiences for your application or to enhance existing applications to optimize your users' productivity.

View: All [Create New View](#)

| Action | Label ↑ | Name | Namespace Prefix | Api Version | Description | Created By Alias | Created Date | Last Modified By Alias | Last Modified Date |
|--------------------------|---------------------------------|---------------------------------|------------------|-------------|----------------------------------------|------------------|------------------|------------------------|--------------------|
| Security | puzzelAgentPage | puzzelAgentPage | puzzel | 46.0 | Landing page for Puzzel contact centre | suzun | 16/10/2019 08:24 | suzun | 16/10/2019 08:25 |

3. Copy the URL from the address bar of the web page and call Puzzel support for saving this URL in the Admin portal for your solution.

puzzel.
Solving Customer Interactions

CUSTOMER

USERNAME

PASSWORD

[Forgot password](#) | [Need new password?](#)

SIGN IN

© 2010-2019 Puzzel AS | [Support](#) | [puzzel.com](#)

CallCenter configuration

You need to integrate the Puzzels CTI adapter into Salesforce Call Center for receiving/ making calls using the Puzzel application. To do this :

1. Go to Feature Settings -> Service -> Call Center -> Call Centers

Feature Settings

- Analytics
- Chatter
- Cisco Webex
- Communities
- Home
- Marketing
- Quip
- Sales
- Salesforce Files
- Service
 - Call Center
 - Call Centers**

SETUP Call Centers

All Call Centers [Help for this Page](#)

A call center corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce.com users must be assigned to a call center before they can use any Call Center features.

| Action | Name ↑ | Version | Created Date | Last Modified Date |
|------------------------------------------|--------------------------------------|---------|------------------|--------------------|
| Edit Del | Puzzel Agent Adapter | | 16/10/2019 08:24 | 31/10/2019 13:47 |

- Click on the **Edit** option against the **Puzzel Agent Adapter** and paste the **Puzzel Application URL** from the previous section against the **CTI adapter URL** parameter.

Call Center Edit
Puzzel Agent Adapter
[All Call Centers](#) > [Puzzel Agent Adapter](#)

Call Center Edit Save Cancel

General Information

Internal Name

Display Name

CTI Adapter URL

Use CTI API

Softphone Height

Softphone Width

Salesforce Compatibility Mode

Dialing Options

Outside Prefix

Long Distance Prefix

International Prefix

Additional Information

Settings

Save Cancel

- Save the changes.

Softphone layout definition

To define the appearance and functionality for a softphone, go to Feature Settings -> Service -> Call Center -> Softphone Layouts and select the layout you wish to edit or create a new one.

Softphone Layouts

Softphone Layout Edit

Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layouts to user profiles by clicking LayoutAssignment in the Softphone Layouts page.

Save **Cancel**

Name: ☒ Is Default Layout

Select Call Type: **Inbound**

Softphone Layout

Display these call-related fields:

- Caller ID, Dialed Number [Edit](#)

Display these salesforce.com objects:

- Account, Contact, Lead [Add / Remove Objects](#)

If single Account found, display: Account Name
If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed. [Edit](#)

If single Contact found, display: Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed. [Edit](#)

If single Lead found, display: Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed. [Edit](#)

Screen Pop Settings

- Screen pops open within: Existing browser window [Edit](#)
- No matching records: Don't pop any screen [Edit](#)
- Single-matching record: Pop detail page [Edit](#)
- Multiple-matching records: Pop to search page [Edit](#)

There are three sections to which you can make changes to suit your layout settings:

| Section | Parameters |
|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Select Call Type | Select Inbound as we are configuring the layout for incoming calls |
| Softphone Layout | <p>Display these call-related fields</p> <ul style="list-style-type: none"> You can choose to display what parameters you wish to see when there is an incoming call. By default, it is set to the number customer is calling from. <p>Display these salesforce.com objects:</p> <ul style="list-style-type: none"> Displays Account details, Contact details or lead details. For more details on configuring this section see https://help.salesforce.com/articleView?id=cti_admin_phonelayoutscreate.htm&type=5 |
| Screen Pop Settings | <p>Describes when the screen need to be popped.</p> <p>https://help.salesforce.com/articleView?id=cti_admin_phonelayoutscreate.htm&type=5</p> |

Adding phone capability to the utility bar

To be able to use the Puzzel application inside Salesforce, we need to add the Phone capability onto the utility bar for easy access. To do that,

- Go to Apps -> App Manager and edit the application you want to place the phone capability in. For example : Service Console

> Users

> Data

> Email

PLATFORM TOOLS

> Apps

App Manager

AppExchange Marketplace

> Connected Apps

> Lightning Bolt

> Mobile Apps

> Packaging

> Feature Settings

> Einstein

> Objects and Fields

> Events

> Process Automation

> User Interface

| 14 Items - Sorted by App Name - Filtered by all appmenuitems - TabSet Type | | | | | | | |
|----------------------------------------------------------------------------|---------------------|--------------------------|---------------------------------------------------------------------------|-------------------|-----------|-------|--|
| | App Name | Developer Name | Description | Last Modified ... | App... | VI... | |
| 1 | App Launcher | AppLauncher | App Launcher tabs | 03/10/2019 12:45 | Classic | ✓ | |
| 2 | Bolt Solutions | LightningBolt | Discover and manage business solutions designed for your industry. | 03/10/2019 12:46 | Lightning | ✓ | |
| 3 | Community | Community | Salesforce CRM Communities | 03/10/2019 12:45 | Classic | ✓ | |
| 4 | Content | Content | Salesforce CRM Content | 03/10/2019 12:45 | Classic | ✓ | |
| 5 | Lightning Usage App | LightningInstrumentation | View Adoption and Usage Metrics for Lightning Experience | 03/10/2019 12:45 | Lightning | ✓ | |
| 6 | Marketing | Marketing | Best-in-class on-demand marketing automation | 03/10/2019 12:45 | Classic | ✓ | |
| 7 | Platform | Platform | The fundamental Lightning Platform | 03/10/2019 12:45 | Classic | | |
| 8 | Sales | Sales | The world's most popular sales force automation (SFA) solution | 03/10/2019 12:45 | Classic | | |
| 9 | Sales | LightningSales | Manage your sales process with accounts, leads, opportunities, and ... | 03/10/2019 12:45 | Lightning | ✓ | |
| 10 | Sales Console | LightningSalesConsole | (Lightning Experience) Lets sales reps work with multiple records on ... | 05/11/2019 11:12 | Lightning | ✓ | |
| 11 | Salesforce Chatter | Chatter | The Salesforce Chatter social network, including profiles and feeds | 03/10/2019 12:45 | Classic | ✓ | |
| 12 | Service | Service | Manage customer service with accounts, contacts, cases, and more | 03/10/2019 12:45 | Classic | ✓ | |
| 13 | Service Console | LightningService | (Lightning Experience) Lets support agents work with multiple recor... | 04/10/2019 13:41 | Lightning | ✓ | |
| 14 | Site.com | Sites | Build pixel-perfect, data-rich websites using the drag-and-drop Site c... | 03/10/2019 12:45 | Classic | | |

Edit

2. Select the **Utility items** on the left menu and click on the **Add Utility Item**. Select **Open CTI Softphone** from the list.

Lightning App Builder

App Settings

Pages

Service Console

APP SETTINGS

App Details & Branding

App Options

Utility Items

Navigation Items

Navigation Rules

User Profiles

App Performance (Beta)

Utility Items

Add Utility Item

Search...

- Einstein Next Best Action
- Flow
- History
- List View
- Macros
- Notes
- Open CTI Softphone
- Quip
- Quip Notifications
- Recent Items
- Report Chart

PROPERTIES

Open CTI Softphone

Utility Item Properties

*Label

Phone

Icon

Panel Width

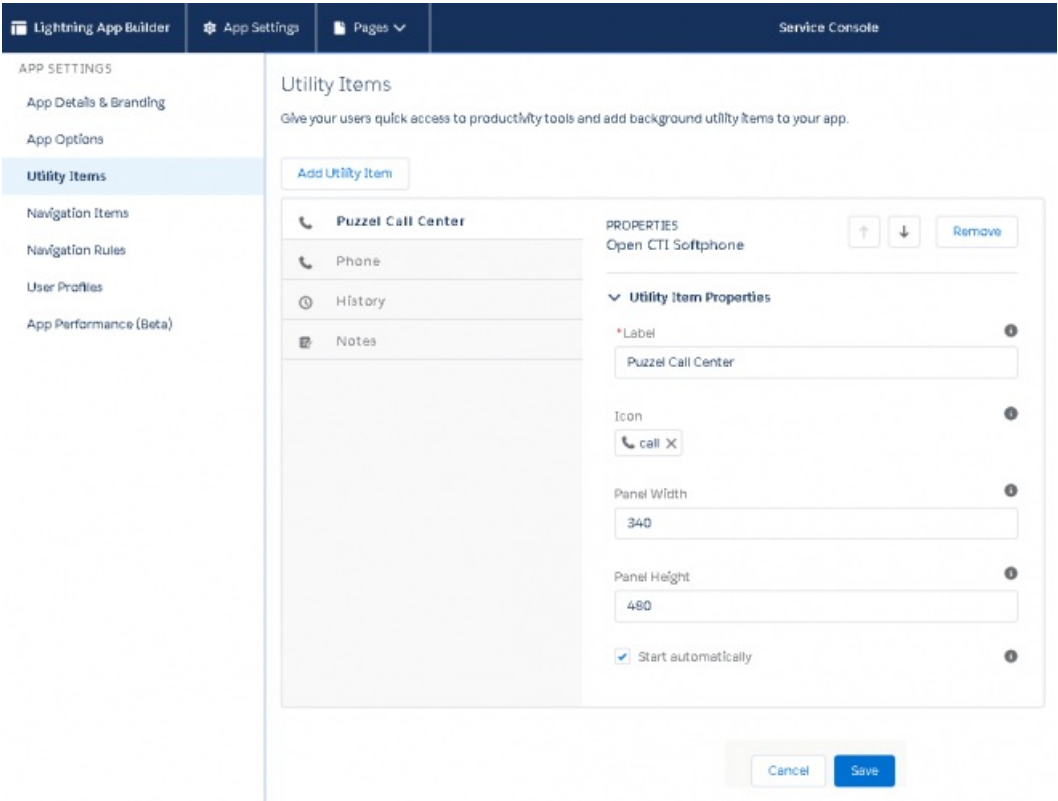
440

Panel Height

600

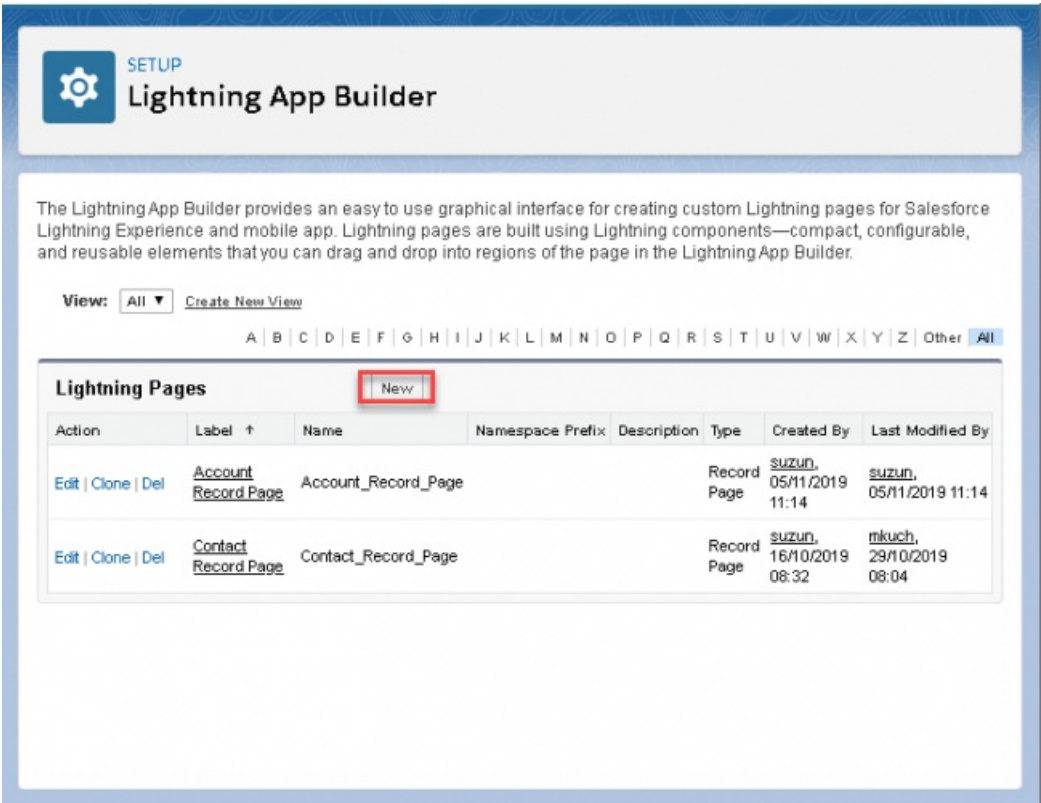
Start automatically

3. Enter the Label name to appear on the Utility bar and **Save** the changes.



Add enquiry log component and customize it

- To add the enquiry log component Go to Setup page and in the quick find tab look for the **Lightning App Builder** and click on it to open the window. Click **New** to add a **Record page**.



- Select Record page and click **Next**.

Create a new Lightning page

App Page
Home Page
Record Page

Customize Lightning Experience record pages.

Next

- Enter the name and select EnquiryLog object from the drop-down list and click **Next**. Complete the step by selecting **Finish**.

Create a new Lightning page

*Label

Puzzel Enquiry Log

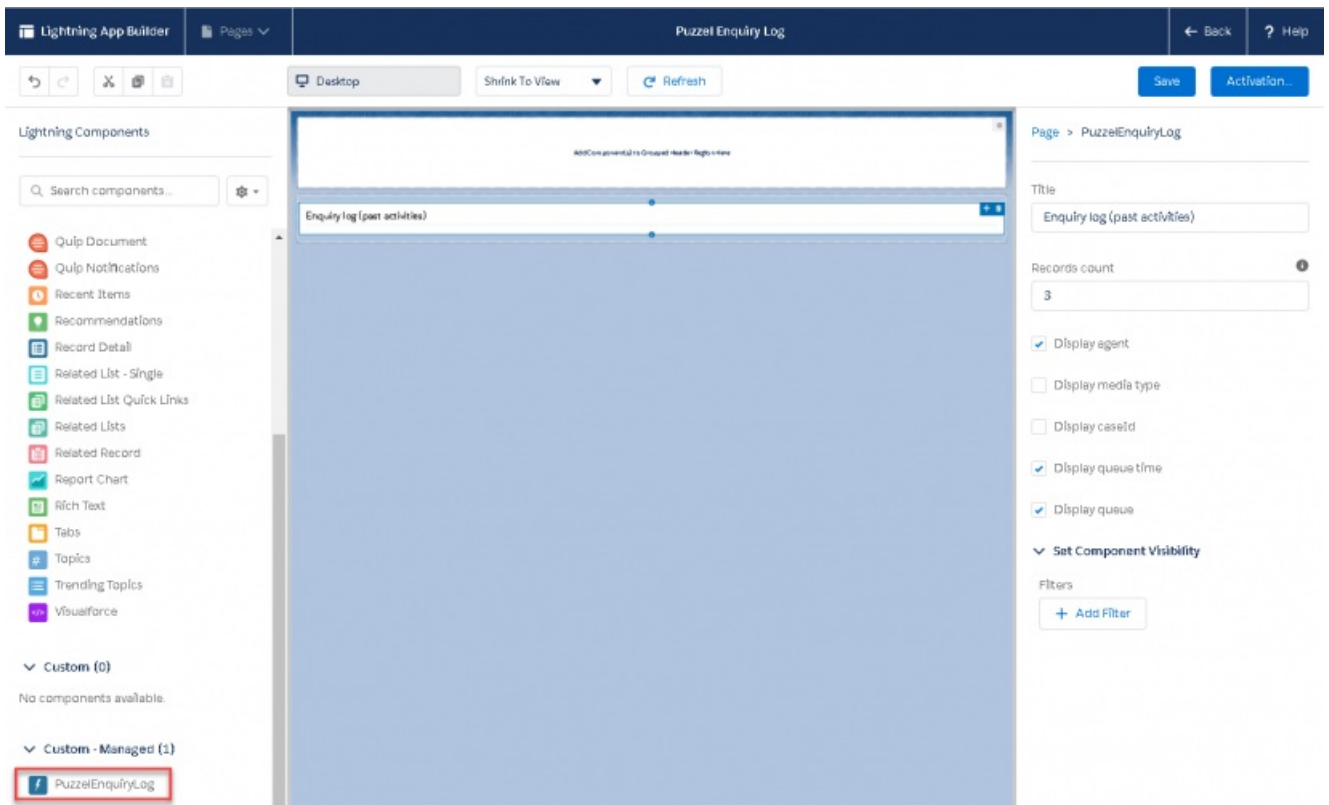
*Object

EnquiryLog

Back

Next

- Drag the enquiry log you just created into the centre frame and customize it to see the parameters you wish to display in the enquiry log. Save the changes.



5. Activate the page.

Page Saved

Activate this page to make it visible to your users.

Activate the page now, or do it later using the Activation button in the App Builder toolbar.



☐ Don't show me this message again




Not Yet

Activate

6. Select **Assign as Org Default**.

Activation: Puzzel ENquiry Log


Custom record pages can be assigned at different levels:

-  **The org default** record page displays for an object unless more specific assignments are made.
- ↳  **App default** page assignment, if specified, overrides the org default.
- ↳  **App, record type, profile** assignments override org and app defaults.

[Learn more about Lightning page assignment.](#)

ORG DEFAULT APP DEFAULT APP, RECORD TYPE, AND PROFI...

Set this page as the org default to display it for all EnquiryLog records, except when app default or app, record type, or profile-specific assignments are defined.

 In standard Salesforce console apps, some objects have a system app default record page. For those objects, if you assign a custom org default page, it doesn't display to users. To enable a custom org default page to show up in the console for those objects, assign a custom page as the app default. [Check your assignments.](#)

Assign as Org Default



Close

7. Save the changes.

Remove as Org Default: Puzzel ENquiry Log

| Review Assignments (1) | | | |
|------------------------|----------------------------|-----------------|---------------|
| CURRENT ORG DEFAULT | LAST MODIFIED | NEW ORG DEFAULT | LAST MODIFIED |
| Puzzel ENquiry Log | Jayanthi Kumar 05-Nov-2019 | System Default | - |

Cancel

Back

Save