Solving Customer Interactions

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

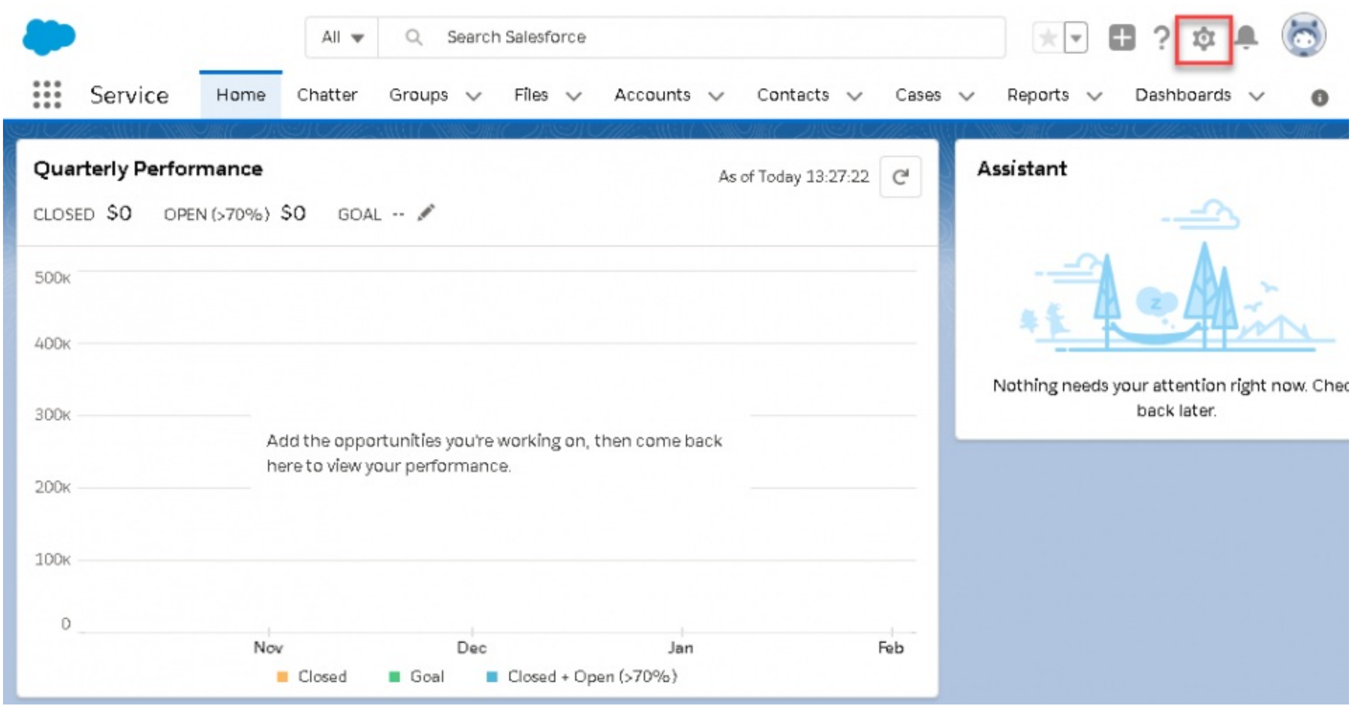
This section describes the steps that need to be done to set up the Puzzel Application within Salesforce. There are 5 essential steps to achieve this:

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.

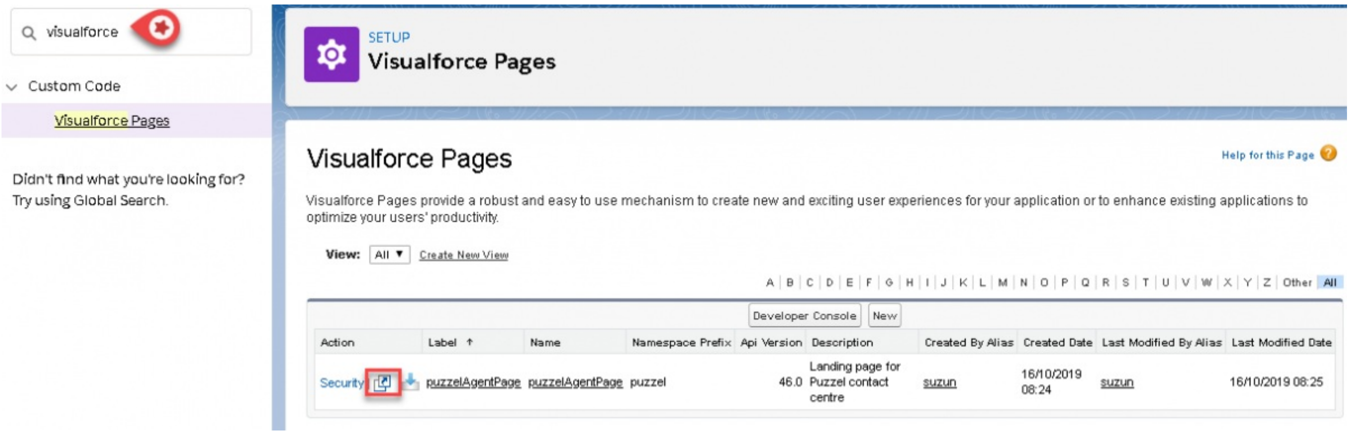
Admin Portal configuration

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.

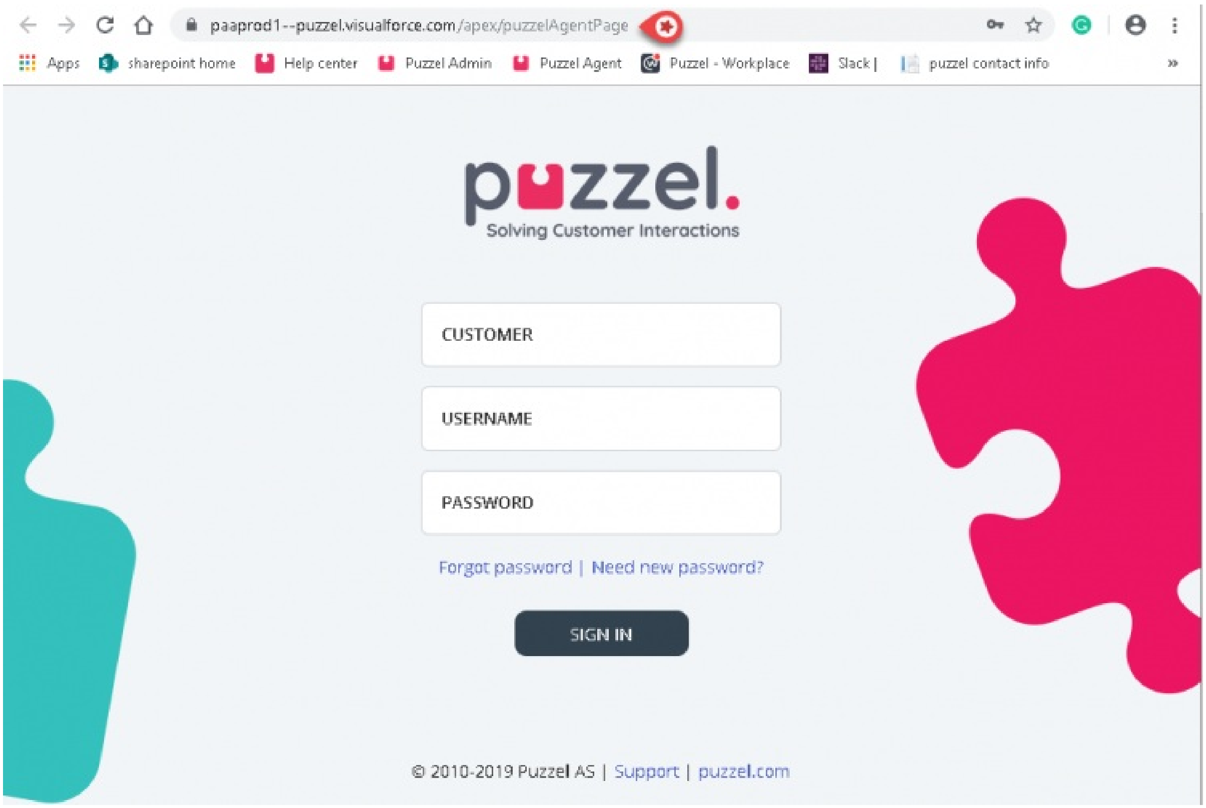
1. To retrieve the URL, login into Salesforce and click on the**Setup** option in the top ribbon menu and select**Service Setup.**



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



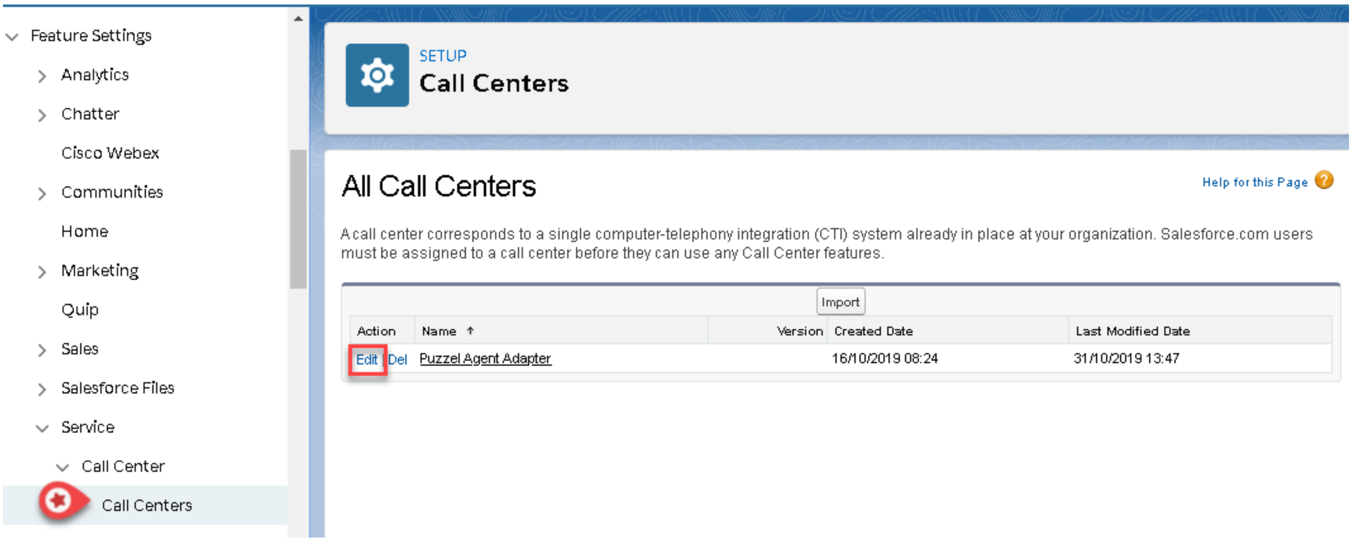
3. Copy the URL from the address bar of the web page and call Puzzel support for saving this URL in the Admin portal for your solution.



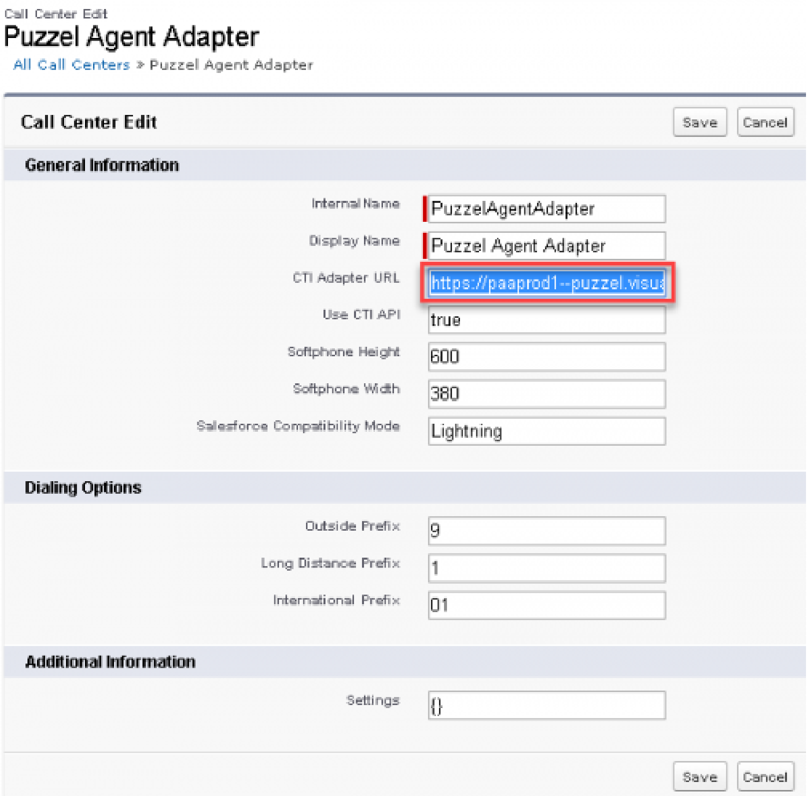
CallCenter configuration

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



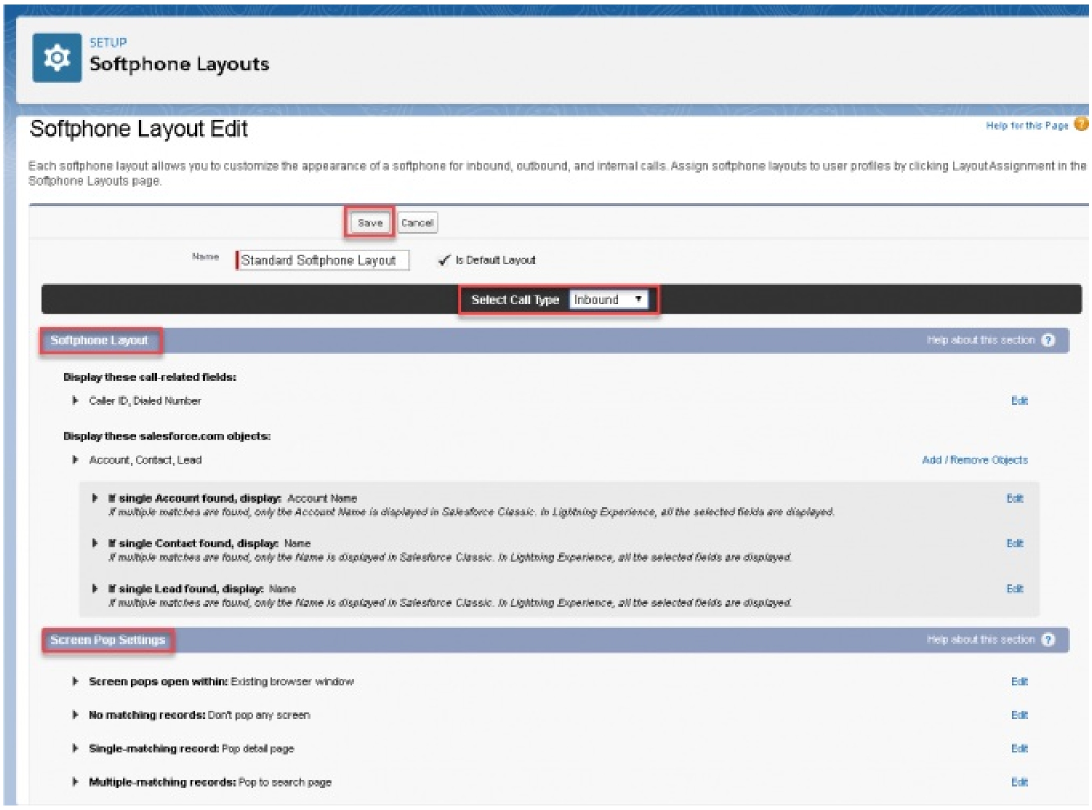
2. Click on the **Edit** option against the Puzzel Agent Adapter and paste the Puzzel Application URL from the previous section against the **CTI adapter URL** parameter.



3. 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.



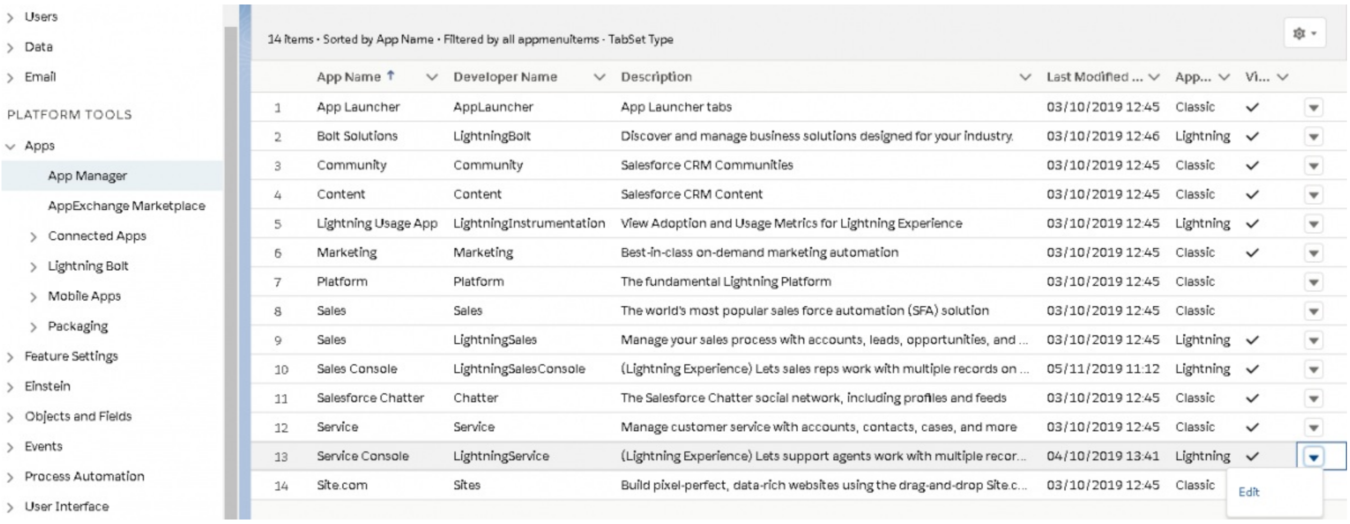
There are three sections to which you can make changes to suit your layout settings:

Section	Parameters
Select Call Type	Select Inbound as we are configuring the layout for incoming calls
Softphone Layout	Display these call-related fields • 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. **Display these salesforce.com objects:** • 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	Describes when the screen need to be popped. https://help.salesforce.com/articleView?id=cti_admin_phonelayoutscreate.htm&type=5

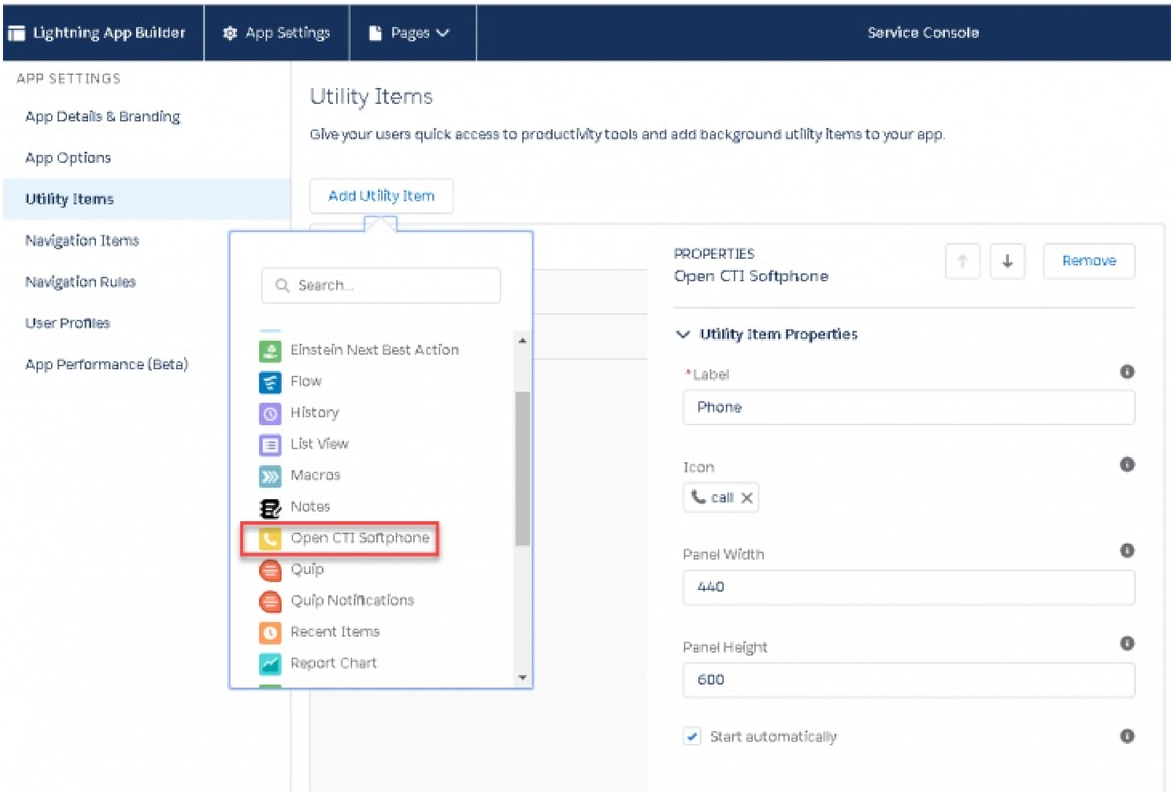
Adding phone capability to the utility bar

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,

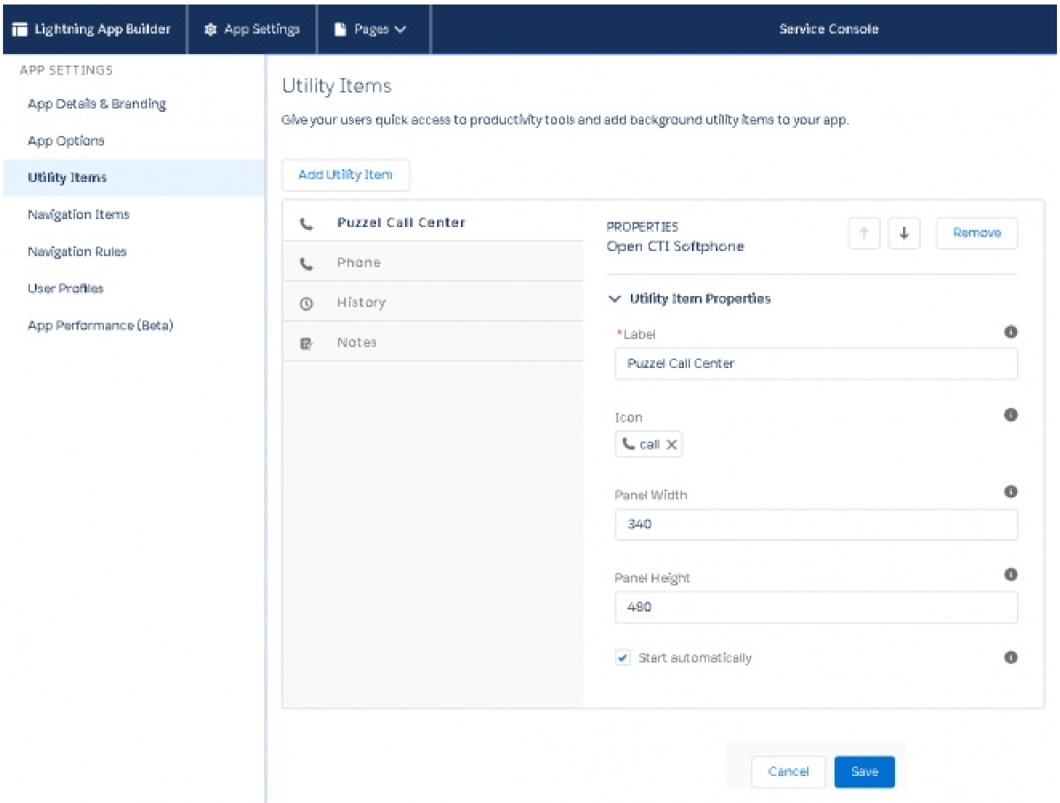
1. Go to Apps -> App Manager and edit the application you want to place the phone capability in. For example : Service Console



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

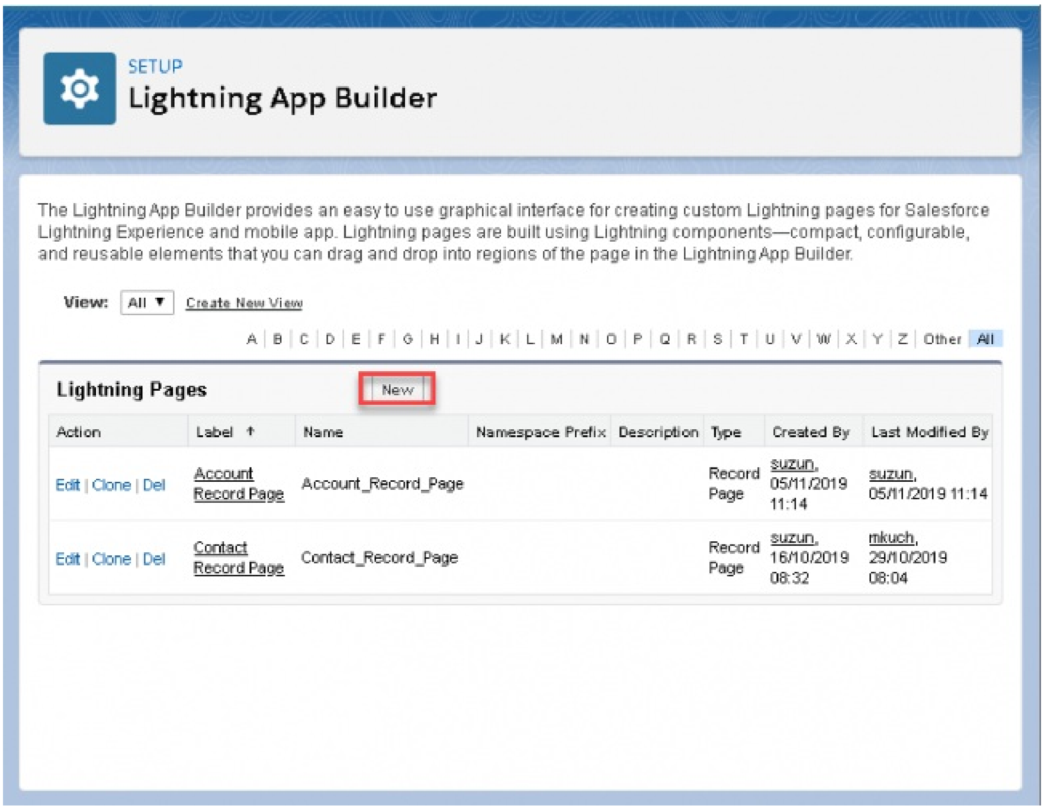


3. Enter the Label name to appear on the Utility bar and**Save** the changes.

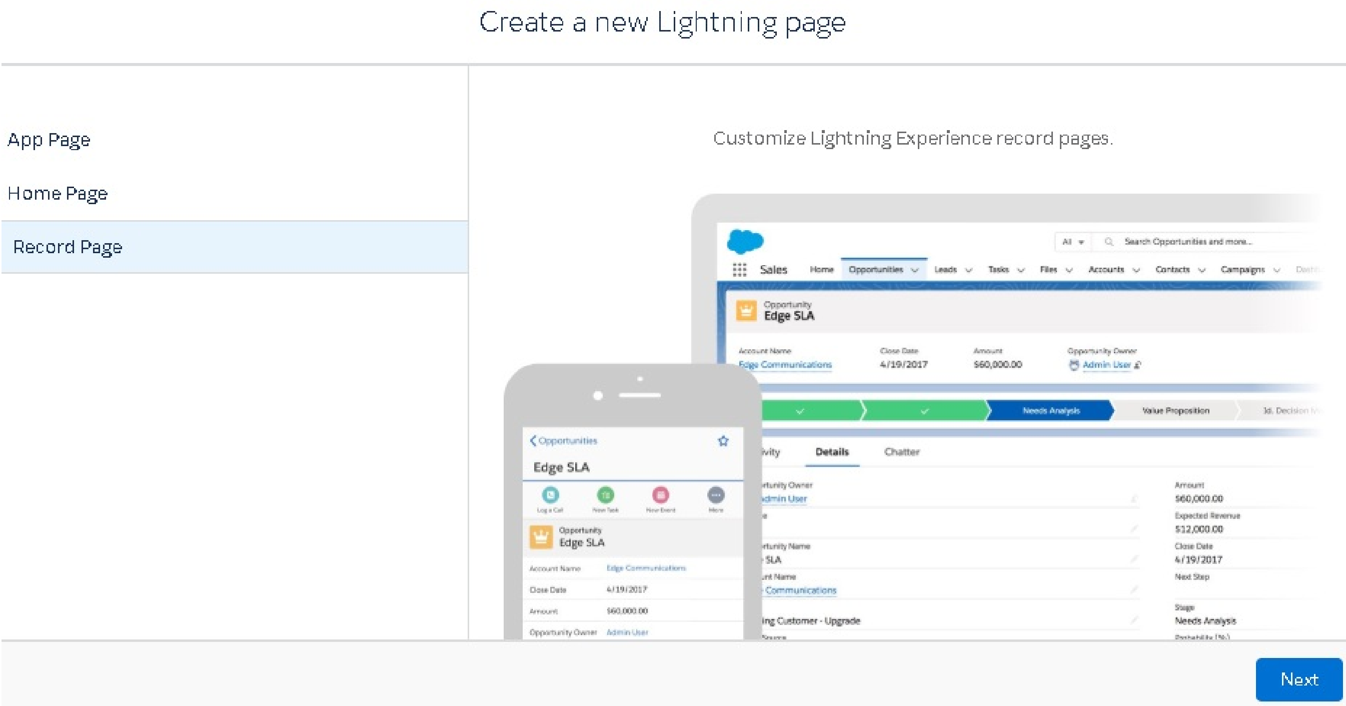


Add enquiry log component and customize it

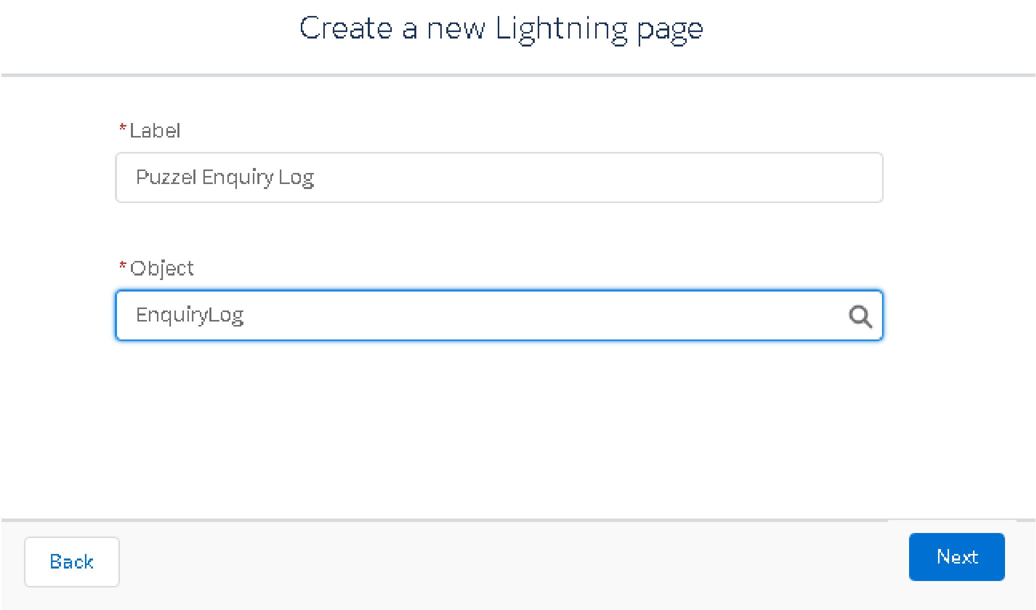
1. To add the enquiry log component Go to Setup page and in the quick find tab look for the **Lightning App Builder** and click on it to open the window. Click **New** to add a **Record page**.



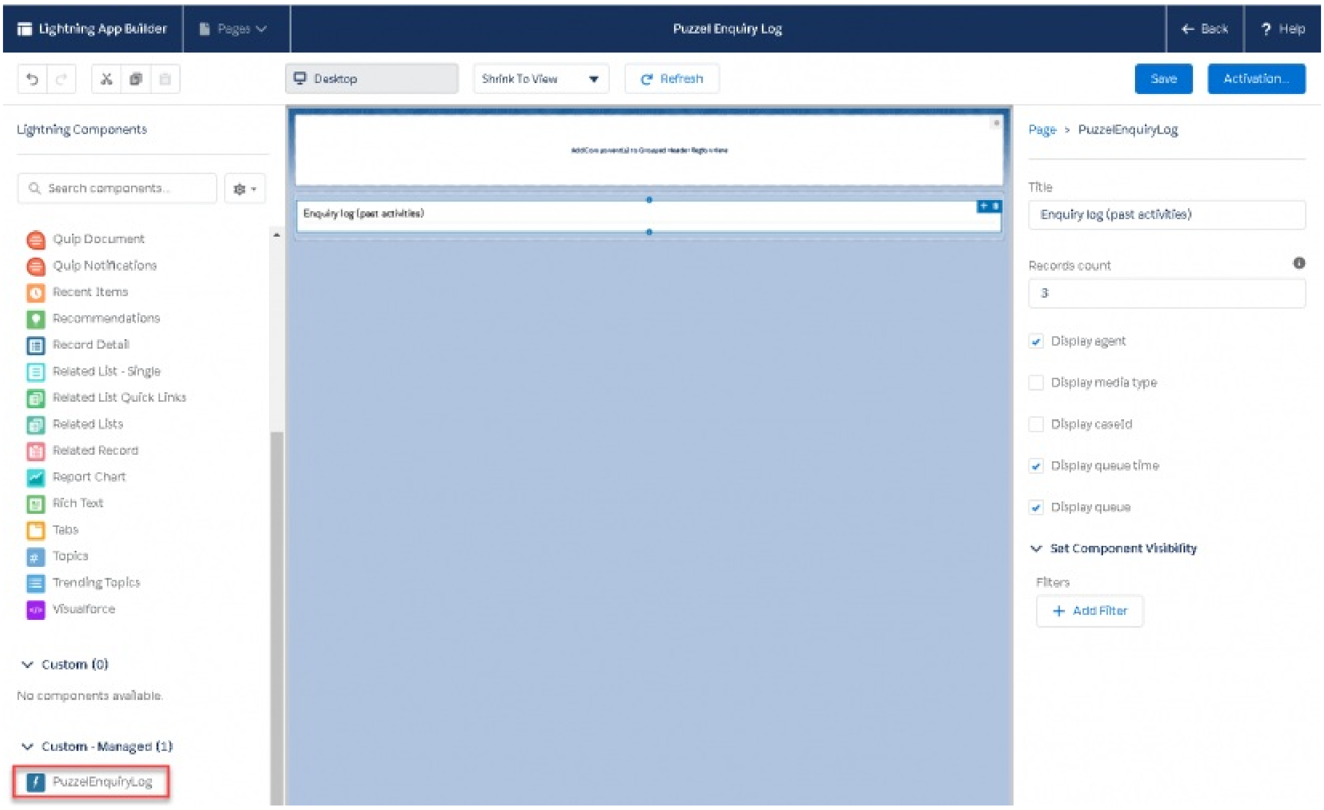
2. Select Record page and click **Next**.



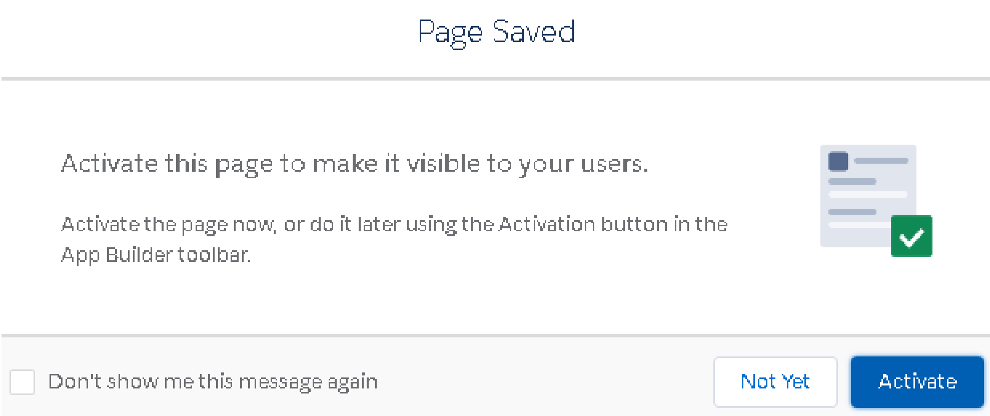
3. Enter the name and select EnquiryLog object from the drop-down list and click**Next**. Complete the step by selecting **Finish**.



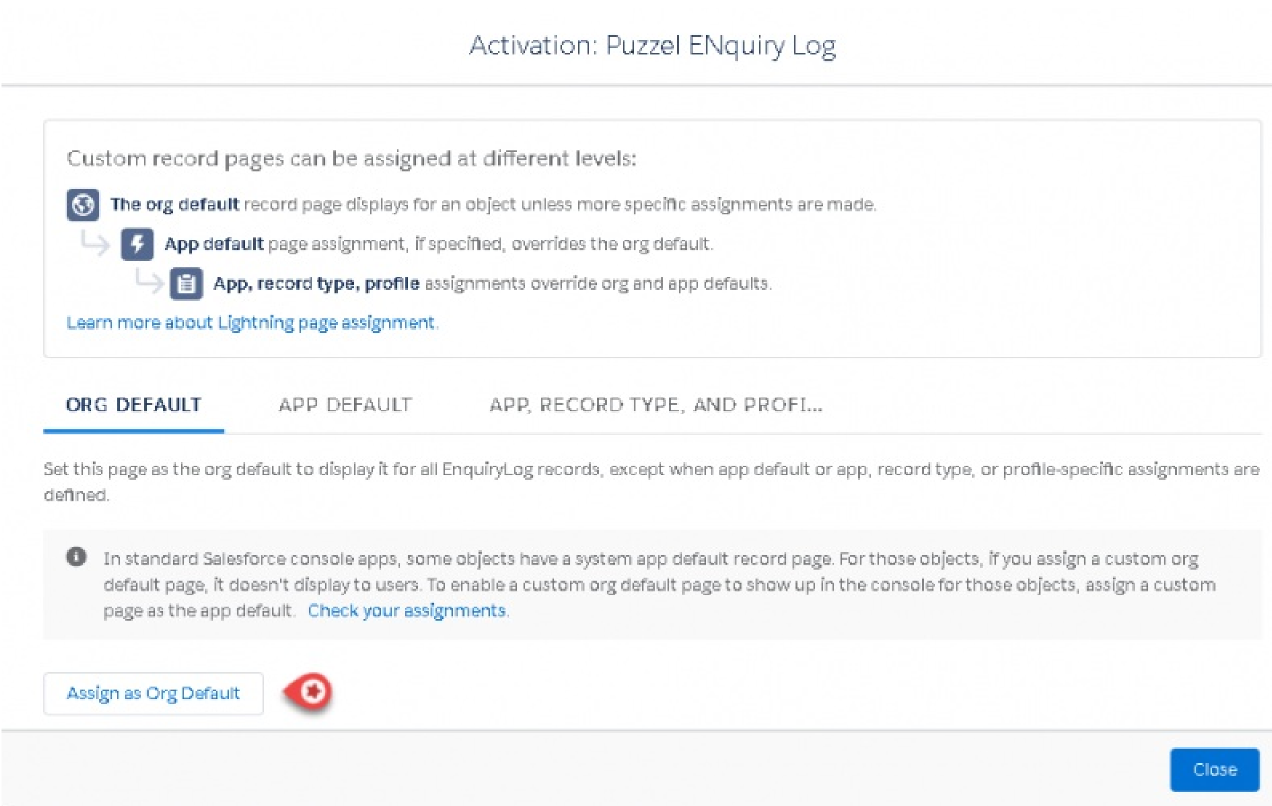
4. Drag the enquiry log you just created into the centre frame and customize it to see the parameters you wish to display in the enquiry log. Save the changes.



5. Activate the page.



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



7. Save the changes.