

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

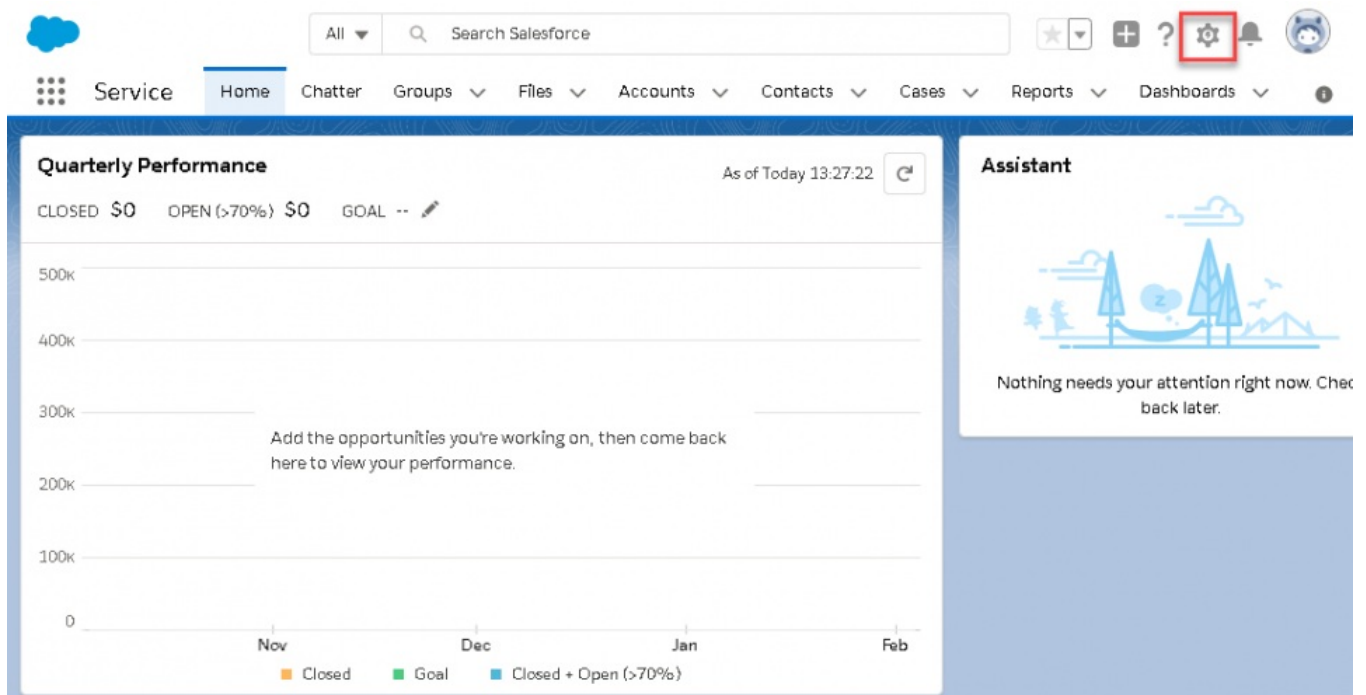
This section describes the steps that need to be done to set up the Puzzel Application within Salesforce. There are 5 essential steps to achieve this:

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.

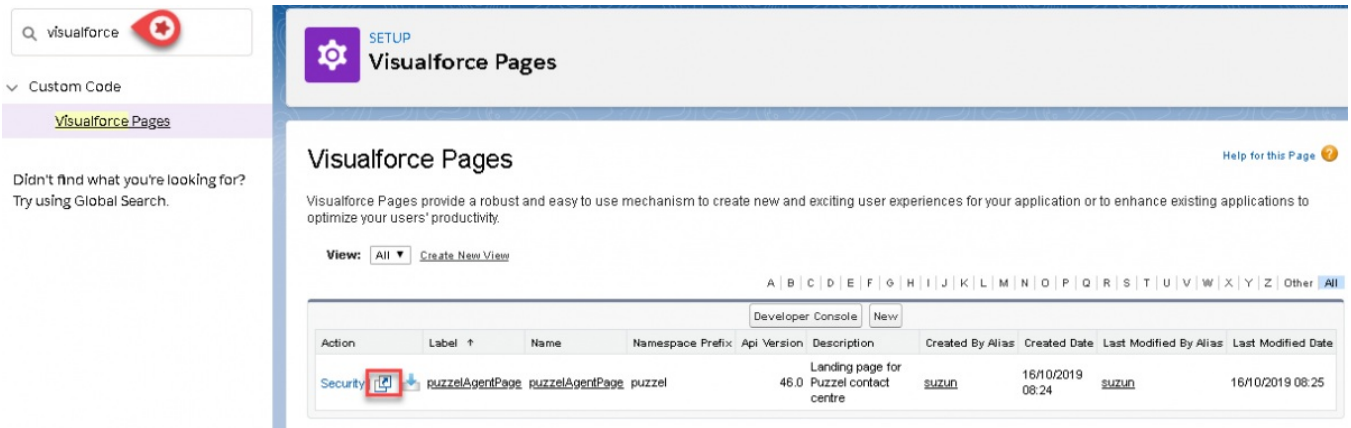
Admin Portal configuration

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.

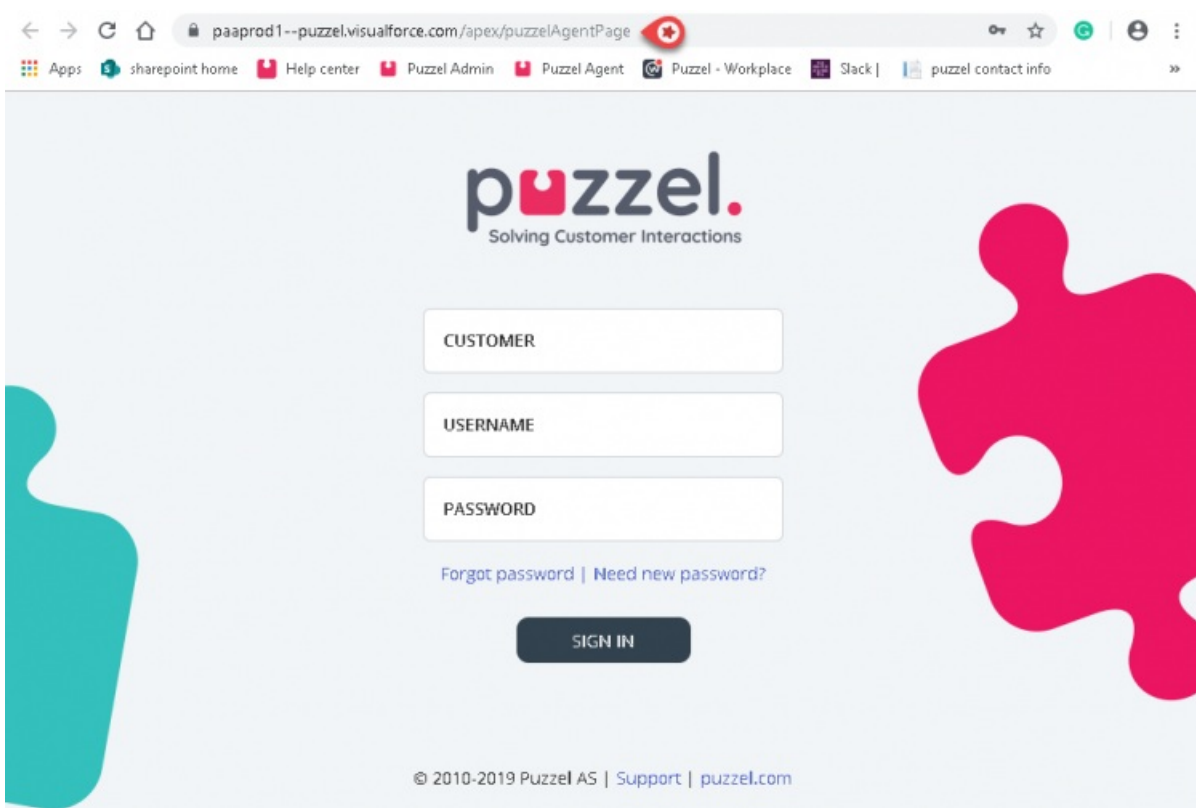
1. To retrieve the URL, login into Salesforce and click on the **Setup** option in the top ribbon menu and select **Service Setup**.



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

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 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

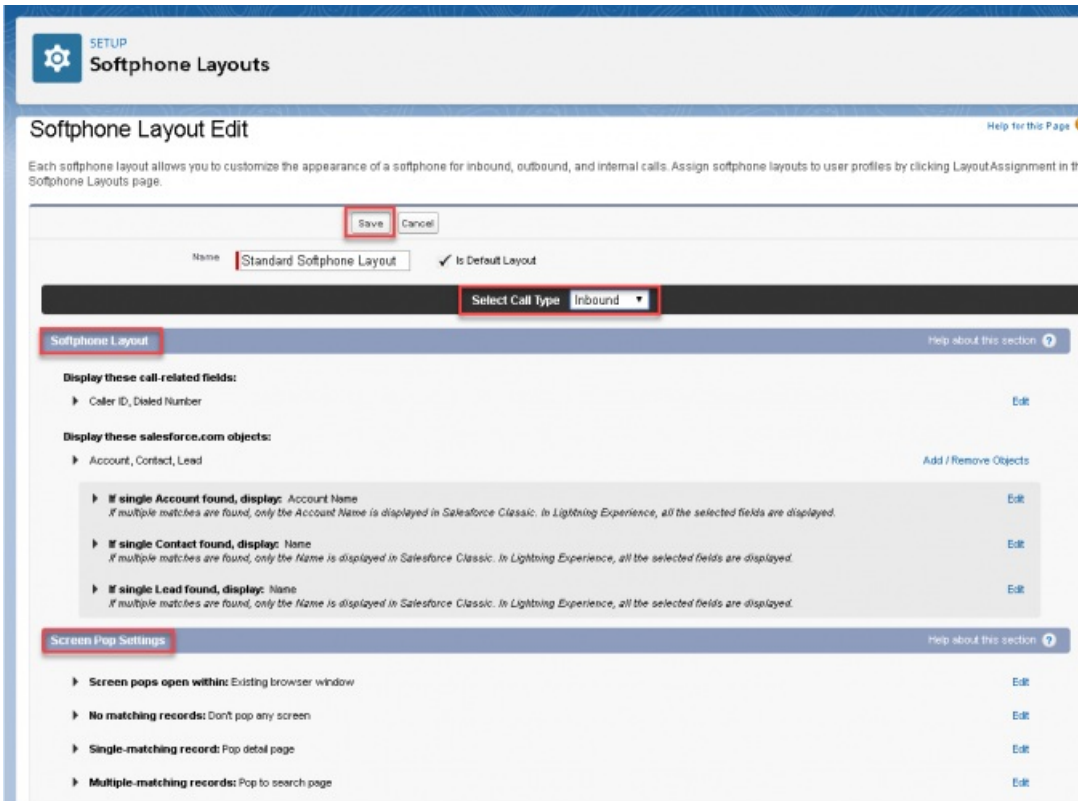
Settings:

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.



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,

1. 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
v 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	

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
Give your users quick access to productivity tools and add background utility items to your app.

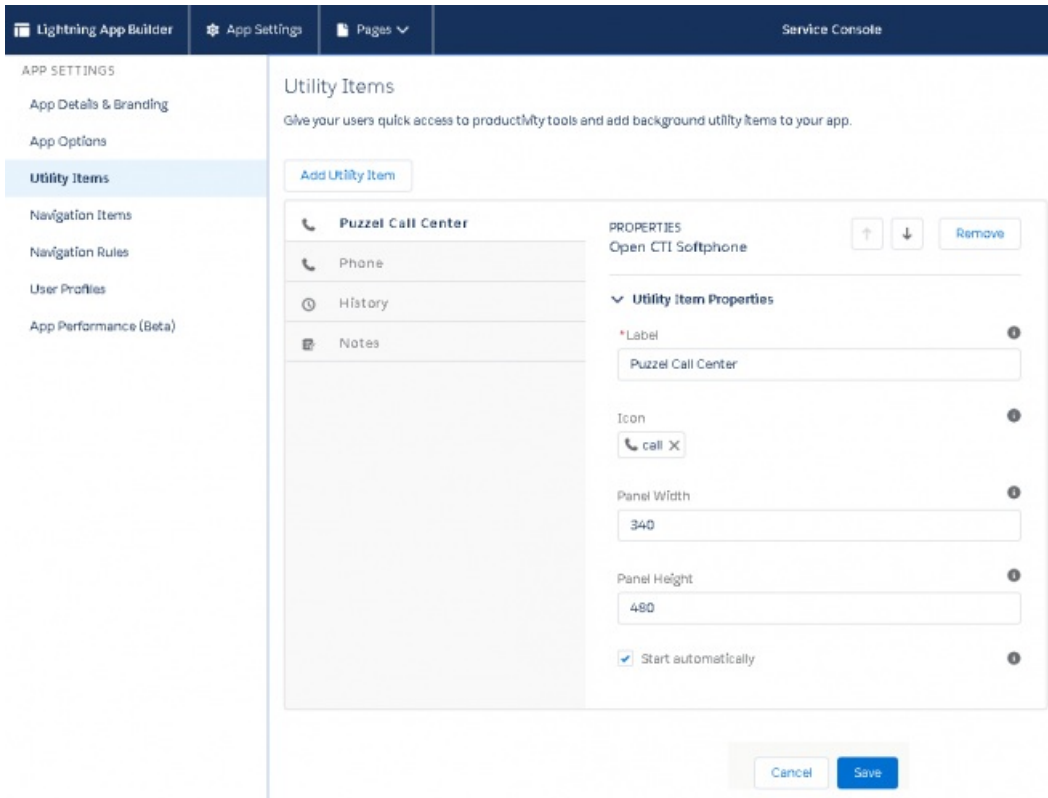
Add Utility Item

PROPERTIES
Open CTI Softphone

Utility Item Properties

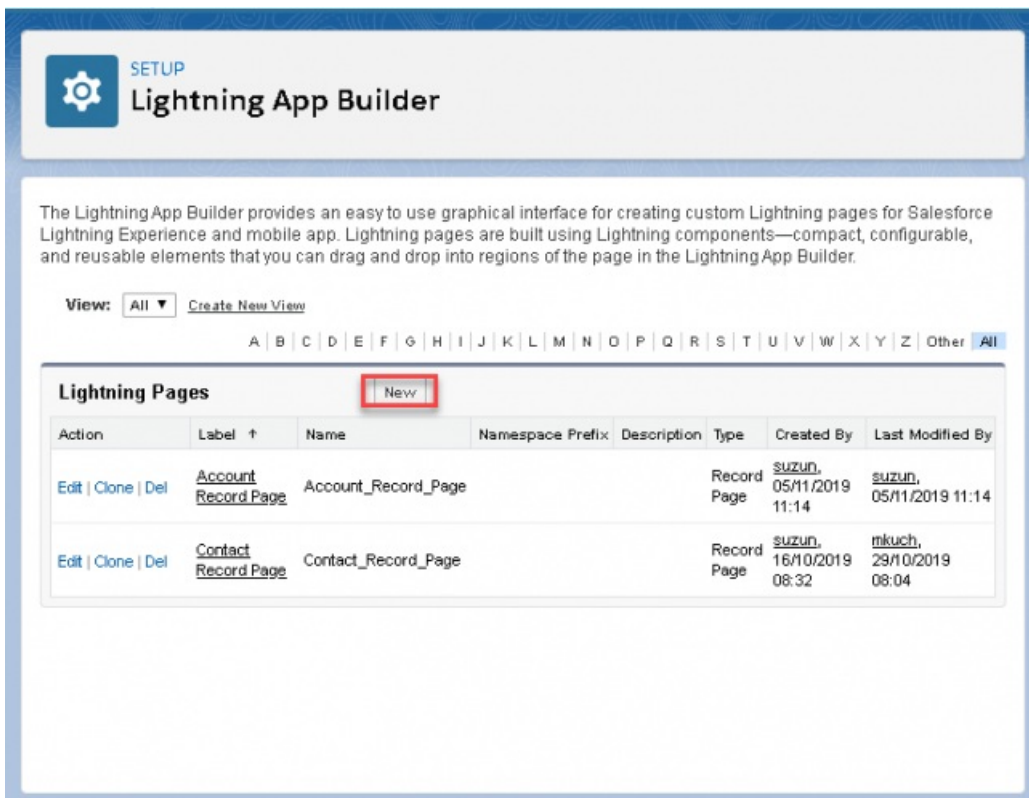
- *Label: Phone
- Icon: call
- Panel Width: 440
- Panel Height: 600
- Start automatically

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



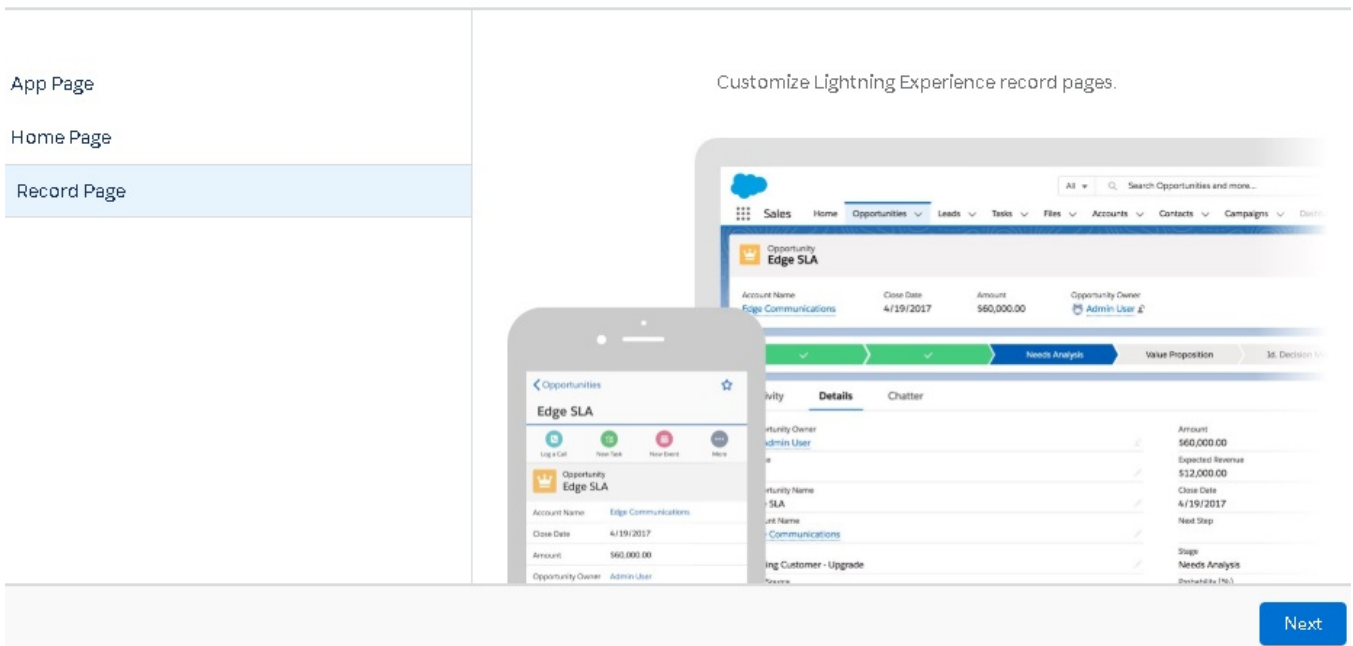
Add enquiry log component and customize it

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**.

Create a new Lightning page



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

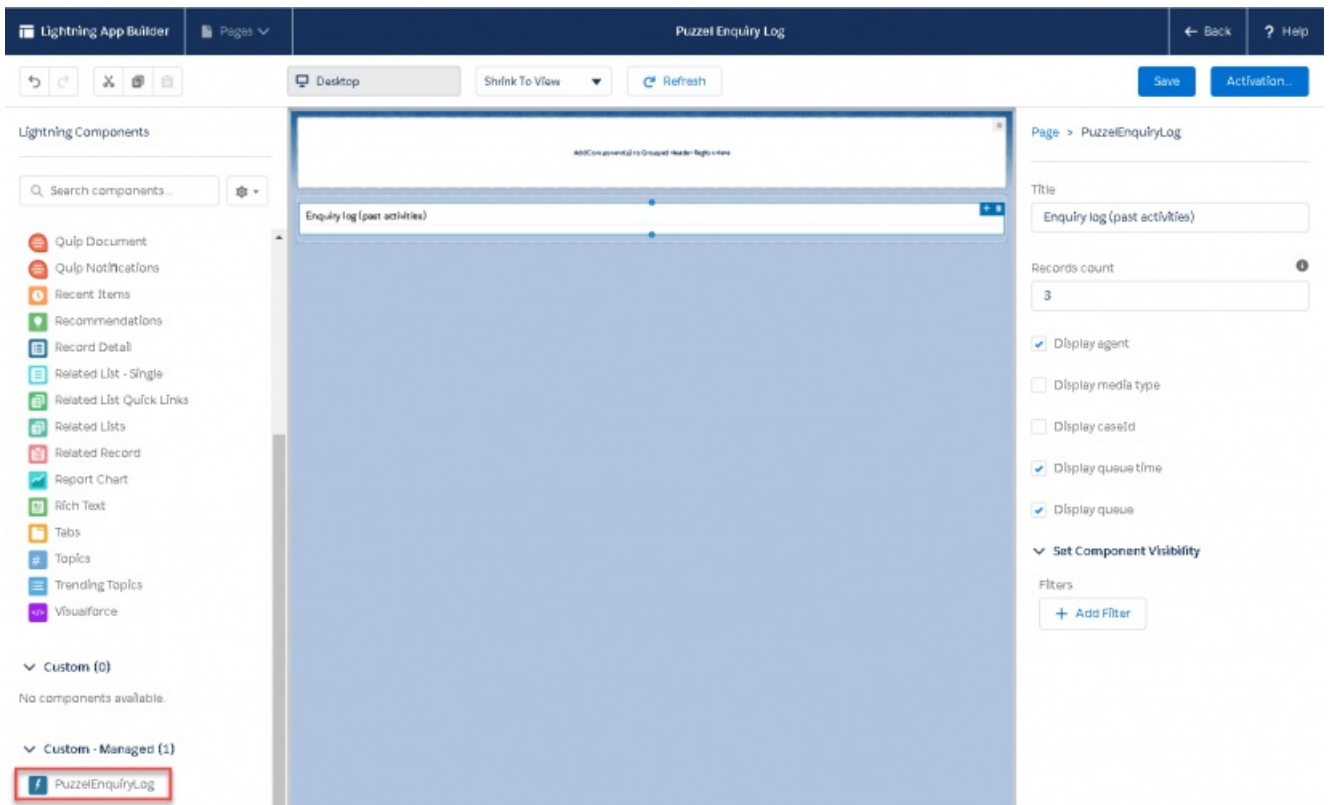
Create a new Lightning page

* Label

* Object

Back Next

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.

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