



User/Administrator Manual for *Salesforce Communicator Version 3*

Author: Zultys Technical Support Department

This document serves as the Administrator and User guide for Zultys Salesforce Communicator Version 3. This version of Salesforce Communicator utilizes the Salesforce OpenCTI interface for communication between the MX and Salesforce CRM. This version eliminates the previous requirement of the “CTI adaptor” which is no longer supported by Salesforce. The benefits of the Salesforce OpenCTI interface are:

- Build CTI systems that integrate with Salesforce without the use of CTI adapters.
- Provide users with CTI systems that are browser and platform agnostic, for example, CTI for Microsoft® Internet Explorer®, Mozilla® Firefox®, Apple® Safari®, or Google Chrome™ on Mac, Linux, or Windows machines.

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Edition Notice

This edition applies to Version 3 of Zultys Salesforce Communicator and all subsequent releases and modifications until otherwise indicated in new editions.

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Zultys Inc.
785 Lucerne Drive
Sunnyvale, CA 94085
USA

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User/Administrator Manual for Salesforce Communicator V.3 (0000000350)/

Revision 2 Dec. 28, 15

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User Manual

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1 Introduction to Salesforce Communicator

1.1 Feature Description

Companies that have installed a Zultys MX IP phone system and that use Salesforce.com as their customer relationship management (CRM) system can integrate the two systems using *Zultys Salesforce Communicator OpenCTI*. After a call center agent installs the software, he/she can make, transfer, and disconnect calls through the MX from within a Salesforce window and obtain a caller's Contact information in a Salesforce screen display. Additionally, Salesforce automatically logs the call record in its database.

- Full call control from within a Salesforce.com contact record, including:
 - Inbound contact record screen-pop
 - Hold, Transfer
 - Call notes and call log
 - Click-to-call from the CRM record

1.2 Salesforce Communicator Requirements

Following requirements must be met for Zultys Salesforce Communicator Version 3 to function properly:

- Agent's computer is running 32-bit or 64-bit version of Microsoft Windows XP (with SP3), Windows 7, Windows 8, or Windows Terminal Server.
- The MX system is running Version 11.0 (or higher).
- Salesforce Enterprise Edition, Unlimited Edition or Professional Edition license is active.
- Agent is logged into ***Salesforce Enterprise Edition, Unlimited Edition or Professional Edition*** using either Internet Explorer Version 8 or above, Firefox Version 11 or above, or Google Chrome Version 11 or above. Any HTML 5 capable browser should work.
- Agent is a member of a Salesforce Call Center established for Zultys. Salesforce Call Center does not have any association with MX user or call group assignments.

- Agent is bound to a phone set or a softphone. Salesforce and Salesforce Communicator OpenCTI do not provide a 'built-in' audio device.
- A Zultys Salesforce Communicator User license is active for any user that is to access the Salesforce application.
- A self-signed or trusted security certificate is active on the MX system.
- CRM Access for each user to access Salesforce is enabled in the Users' profile.

2 Implementing Zultys Salesforce Communicator OpenCTI

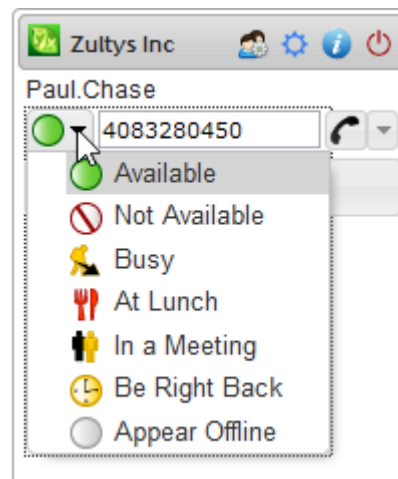
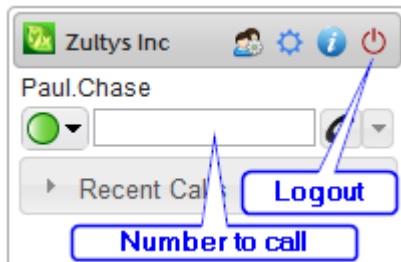
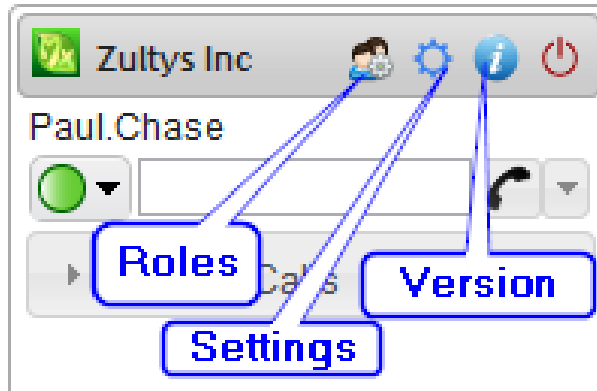
2.1 Installing Zultys Salesforce Communicator Version 3 (OpenCTI)

1. Go to <http://www.salesforce.com/>
2. Login with correct credentials

Proceed to application package.
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tF0000000KkyN>
3. Press 'Continue' -> Next -> Grant access to all users -> Next -> Install -> Installation is complete
4. After installation is complete, go to App setup -> Customize -> Call center -> Manage call Centers. Zultys Call Center Adapter Open Cti 1.0 must be present in the list.
5. Click Zultys Call center link -> Manage Call center users -> Add more users.
6. Search for the current user using corresponding form and add it
7. Go to 'Home' tab; Zultys SF application window must be displayed
8. Login to app with MX user credentials
9. Launch MXIE and login to the same MX with corresponding user, binding it to device (phone or softphone)
10. User will have the ability to initiate, answer and reject calls from web UI, change presence status, call back, etc.
11. On PC REMOVE any previous adapter, no longer needed/supported

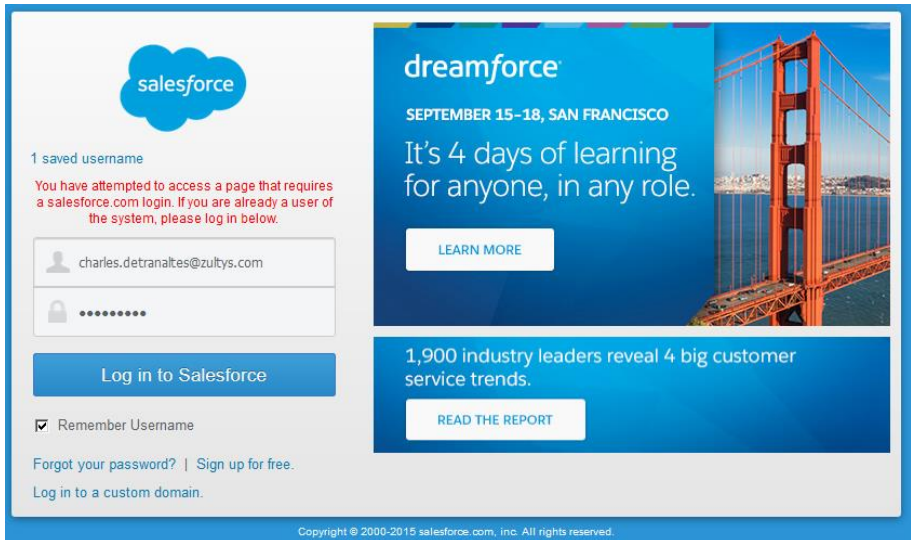
Note: It may be necessary to add exceptions to your browser if the application fails to start. These exceptions are:

2.2 Main Screen

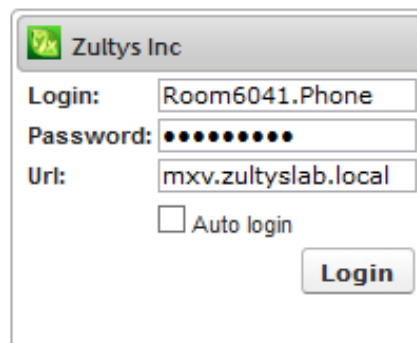


3 Running Salesforce with Zultys MX

1. Click on the link for Salesforce in your web browser.
2. Login with the proper Salesforce credentials:



3. A Zultys Salesforce Communicator pane opens in the left pane of the Salesforce window. If this is the agent's first login, the pane appears as below. Enter the agent's **Zultys MX** log-in information. The log-in is stored on the agent's computer and will not be requested again.

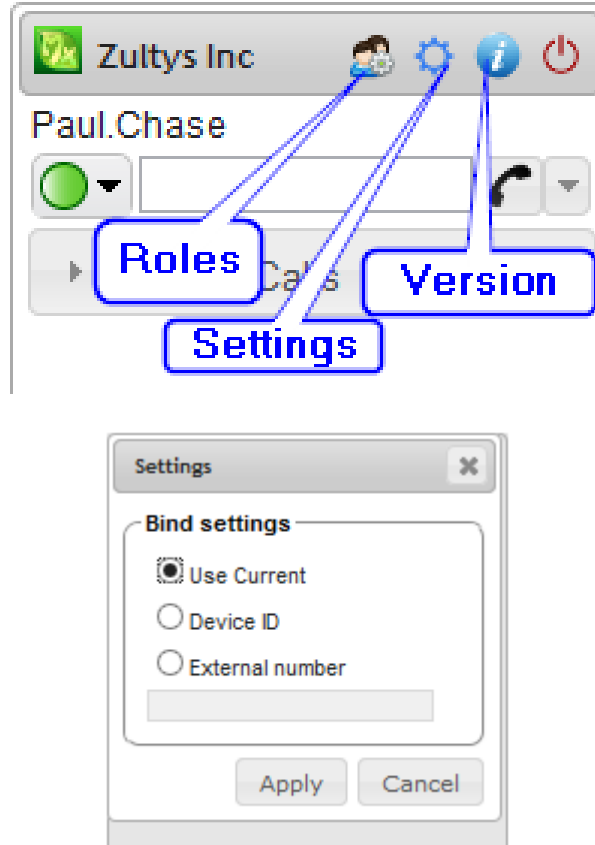


Login: Is your MXIE User name

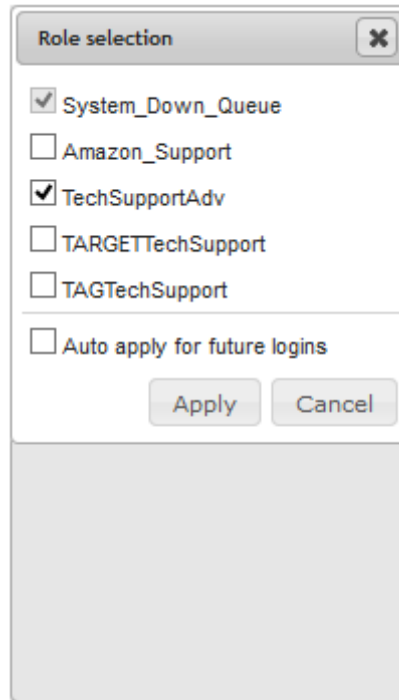
Password: is your MXIE password

Url: IP address/DNS name of the MX system

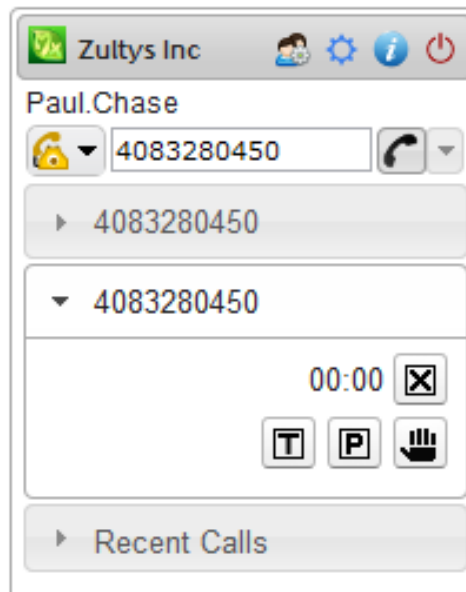
4. Bind to the desired device in the Settings menu.



5. When connectivity is achieved, the Select Role to Login screen appears.



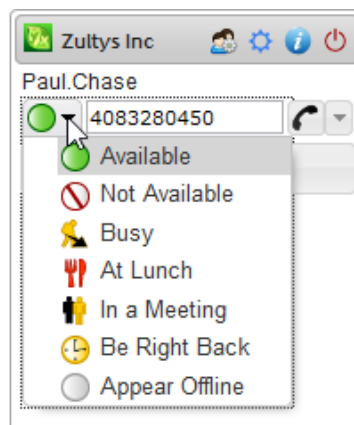
6. Select the checkboxes for roles to log in as and press Apply.
7. The pane appears as below, and a gray indicator signals that the line is open.



Note: The roles that a user is logged in as are synchronized between MXIE and Salesforce Communicator. For example: if an Agent is logged into an Operator role in MXIE and later deselects this role while logging into Salesforce Communicator, the agent will also be logged out of their Operator role in MXIE.

3.1 Setting Presence

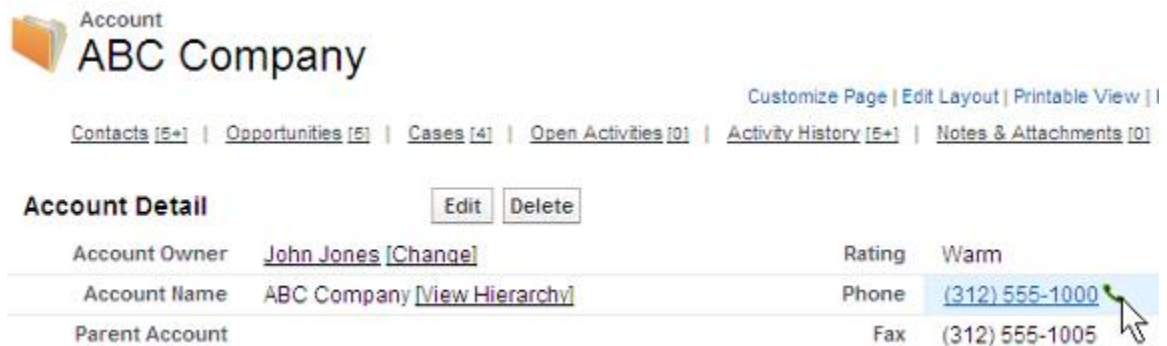
You may set your presence in the Salesforce application. Select the presence indicator drop down and set the desired presence.



4 Making a Call within Salesforce

4.1 Using an Existing Account

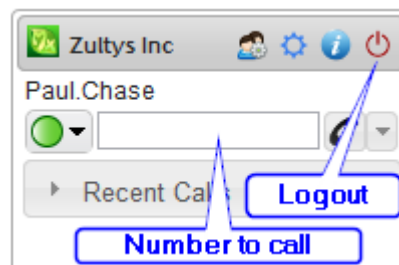
1. Display the Account or Contact screen.



2. Click on phone icon next to phone number.
3. The MX will call the agent's bound phone.
4. When the phone is answered by the agent, then the MX will complete the call.

4.2 Using the Zultys Adapter

1. In the Zultys Communicator pane, enter the number to be called in the dial window.

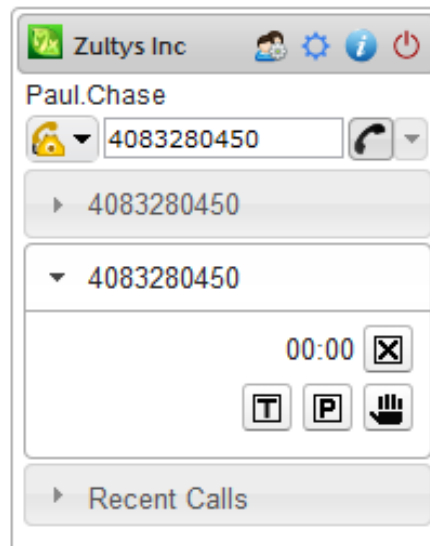


2. Click the handset icon or press ENTER. The MX will call the agent's bound phone.
3. When the phone is answered by the agent, then the MX will complete the call.

5 Receiving a Call within Salesforce

5.1 Accepting a Call

When a call is received, the Zultys Communicator pane displays the caller information, and the agent can either answer the call or decline it.



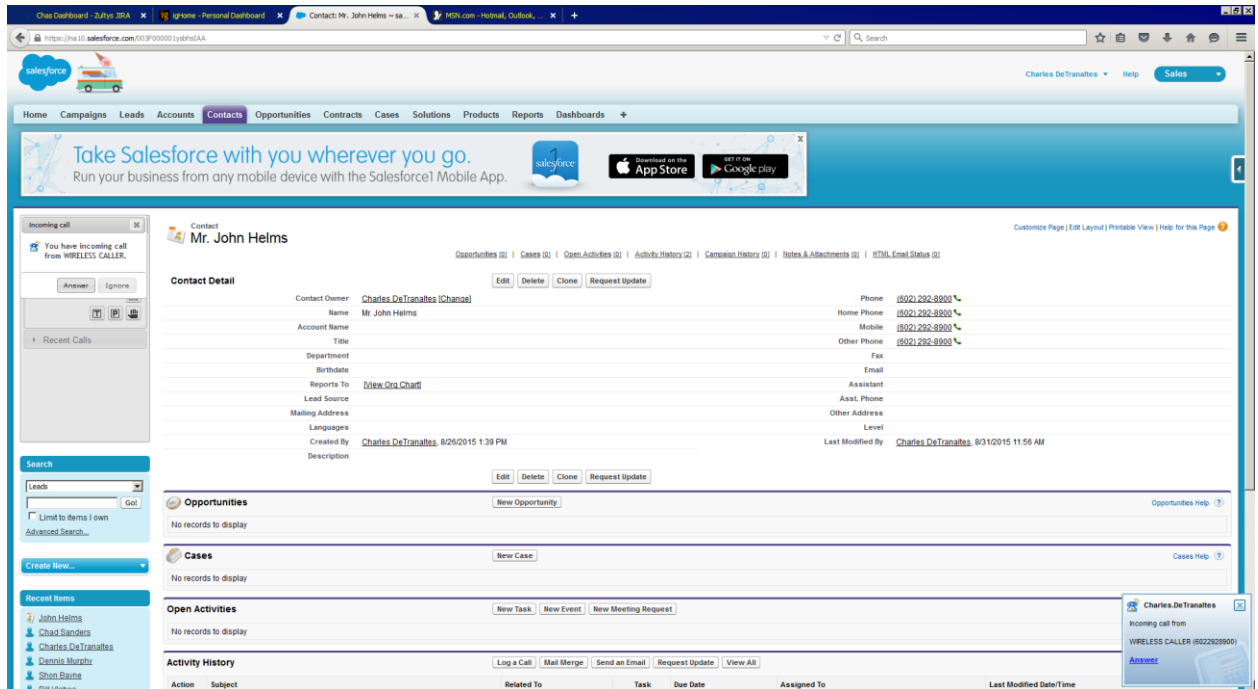
You will have the option to take notes on the call via the connector.

While on the call, the following Call Control functionality is available:

- Hold
- Transfer
- Park
- Disconnect
- Multiple Calls

5.2 Contact Screen Pane

1. When a call is answered from a telephone number that is stored in the Contact database, the Salesforce Contact window automatically opens with the caller's contact information displayed.



If the Caller ID is identified with more than one contact in the Salesforce Contact database, a list of contacts associated with that Caller ID will display in the Zultys Communicator pane.

After answering the call, clicking on the appropriate caller's name opens that caller's contact window.

2. If there is no Caller ID match in the Contact database, the agent can create a new Salesforce Contact page and save the Zultys Communicator call Log to the new contact.

Note: ZSFA will not automatically populate the CallerID field in Salesforce!

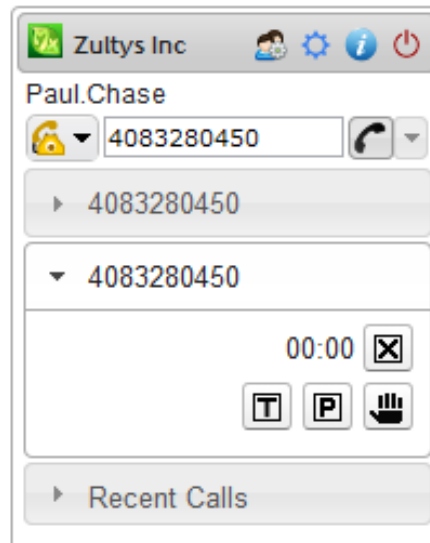
5.3 Activity History (Call Log)

Salesforce will keep a record of call activity in the Activity History area. You may Edit/Delete each activity record within Salesforce.

Activity History							Activity History Help ?
Log a Call Mail Merge Send an Email Request Update View All							
Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time	
Edit Del	Call from WIRELESS CALLER		✓	9/8/2015	Charles DeTranalles	9/8/2015 11:22 AM	
Edit Del	Call from WIRELESS CALLER		✓	9/4/2015	Charles DeTranalles	9/4/2015 10:51 AM	
Edit Del	Call from Ina Dzerushava		✓	8/27/2015	Charles DeTranalles	8/27/2015 1:53 PM	

6 Call Control


The Zultys Salesforce Communicator pane presents control buttons for ending the call, putting it on hold, parking and transferring it.



6.1 Ending Call

Click on the **End Call**  button.

6.2 Putting Call on Hold/Retrieving Call

1. To place the call on hold, click on the **Hold**  button.
2. The call is put on hold, and the control button changes to a **Retrieve From Hold** button.
3. To retrieve call, click on the **Retrieve From Hold** Button.


6.3 Parking a Call/ Retrieving a Parked Call

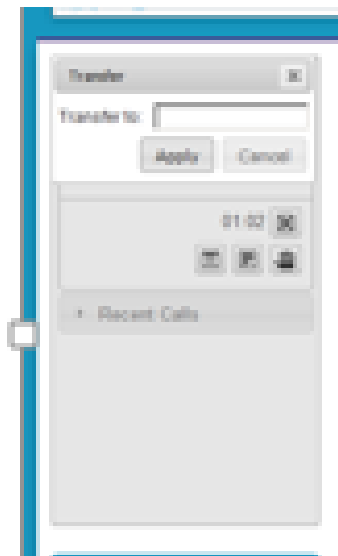
1. To park a call, click on the **Park**  button.
2. A popup message appears in the corner of the screen with the Park ID.



3. To retrieve a parked call, click on an open line. A dial pad opens.
4. Dial the Park Server followed by the Park ID and press the **Dial** button.
5. The MX will call the agent's bound phone.
6. When the phone is answered by the agent, then the MX will complete the call.

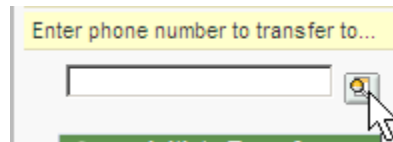
6.4 Transferring Call

1. To transfer the call, click on the **Transfer**  button.
2. The transfer to window appears.

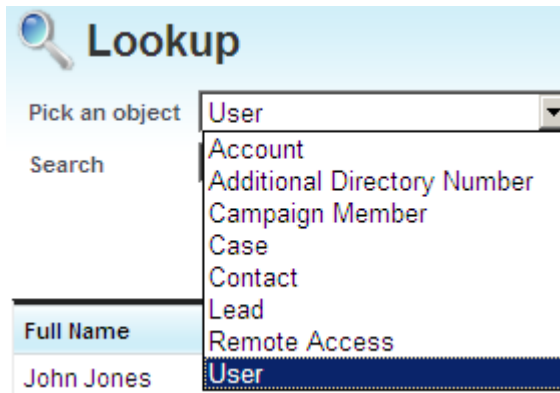


3. Enter the transfer number by keying it directly into the phone number window.

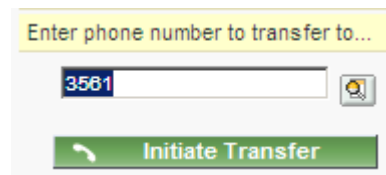
- Alternatively, the transfer number can be retrieved from the Salesforce database. Click on the Lookup icon next to the phone number window.



- The Salesforce Lookup window opens.
- Conduct a search.



- Click on phone icon next to the identified party.
- That person's number is automatically entered into the phone number window.
- Click on the **Initiate Transfer** button. Call is transferred.



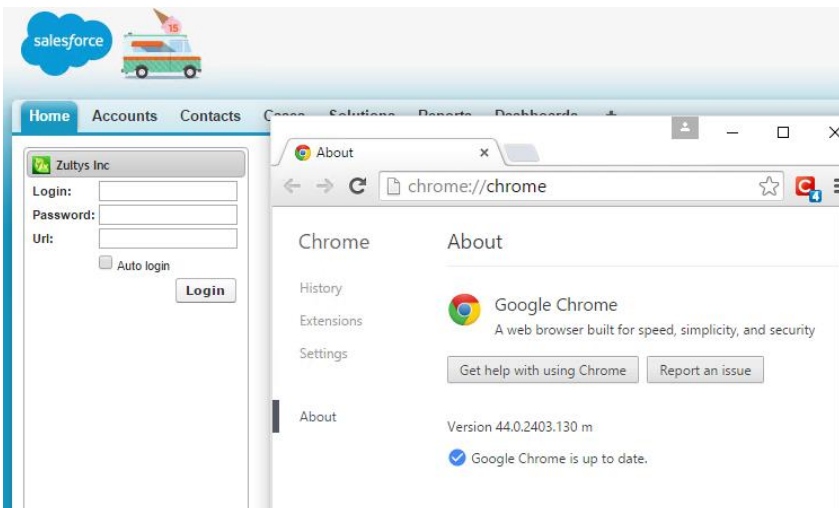
7 Web Browser Support

Zultys Salesforce Communicator Version 3 functions in Internet Explorer, Firefox, Chrome, Safari, and Edge.

IE:



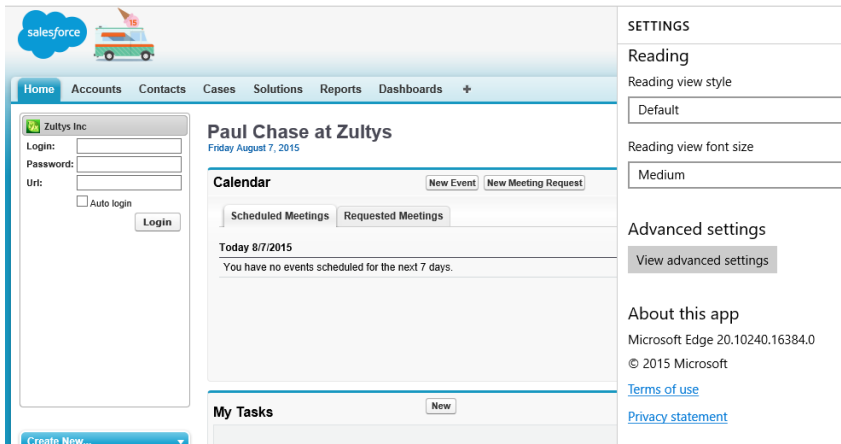
Chrome:



Firefox:



Edge:



Safari on MAC:



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8 Salesforce Administrator’s Setup

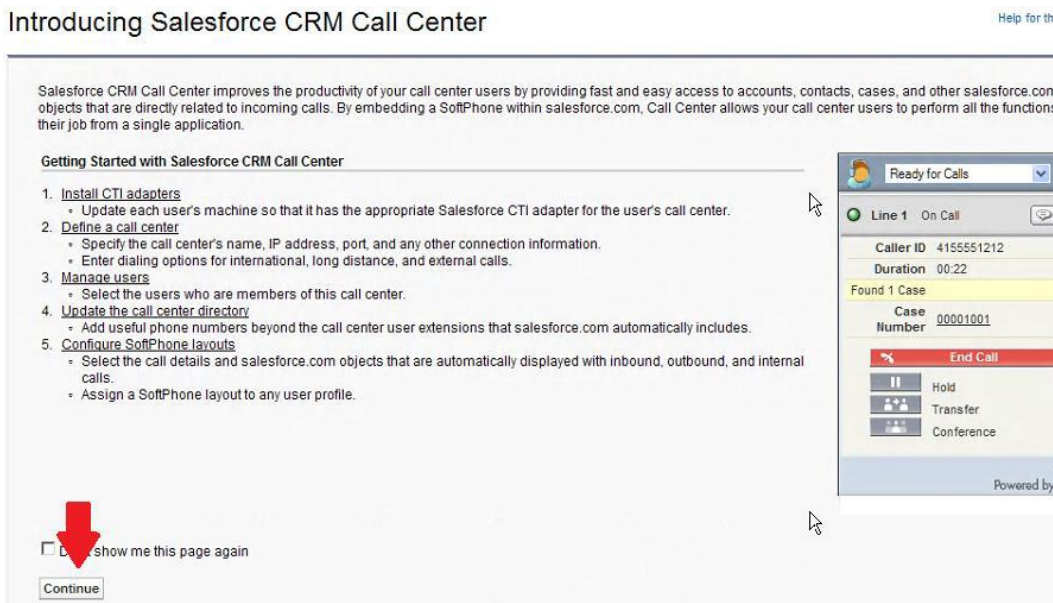
8.1 To create additional call centers for a particular CTI adapter

If the Zultys Call Center has not yet been established, it will need to be created. The easiest way to establish a Zultys Call Center is to import the Call Center Definition file. A call center definition file specifies a set of fields and values that are used to define a call center in Salesforce for a particular CTI adapter. Salesforce uses call center definition files in order to support the integration of Salesforce CRM Call Center with the Zultys MX. The first instance of a call center record for a particular CTI adapter must be defined by importing the adapter’s call center definition file. Subsequent call centers for a CTI adapter can be created by cloning the original call center record.

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, click Your Name ► Setup ► Customize ► Call Center ► Call Centers.
2. If the Introducing Salesforce CRM Call Center splash page appears, click Continue.



Click Import.

All Call Centers

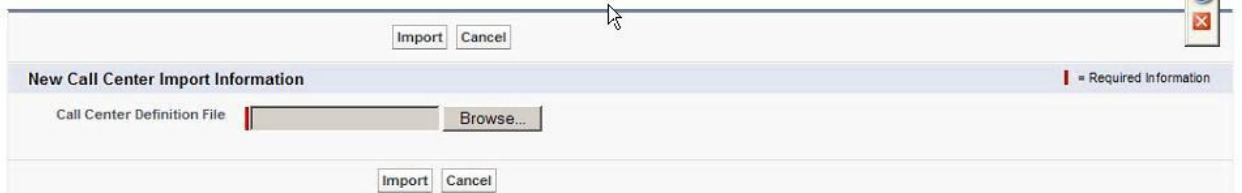
A call center corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce.com users must be assigned to a call center before they can use any Call Center features.



Next to the Call Center Definition File field, click Browse to navigate to the ZSFA installation on a user's PC. This XML file is named after the type of CTI system that the adapter supports. For example, the MX's adapter's default call center definition file is named ZSFA.xml. Click Open to enter the path in the Call Center Definition File field.

Call Center Import

To create your first call center record for a CTI adapter that was just installed, import the adapter's default XML call center definition file into salesforce.com. The call center definition file is located in the adapter's installation directory, and is typically named after the type of CTI system that the adapter supports (for example, "CiscotPCCEnterprise7x.xml"). [View sample definition file](#)



Click Import.

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

12. 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.
13. Click **Clone**.
14. 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.
15. Make any additional changes to the new call center as necessary.


16. Click **Save**.

8.2 Enabling an Existing Call Center for a user

To enable Salesforce Communicator on your MX IP phone system, users need to be assigned to a specifically created Zultys **Call Center**. The Salesforce Call Center does not have any association with MX user/call group assignment, or creation of a call group on the MX.

8.3 Modifying an Existing Call Center

If you are upgrading from Version 1 or Version 2 of ZSFA, it is recommended to create a new call center using the above process and assign the newly created call center to the users.



The screenshot shows the Salesforce 'User Detail' page for Charles DeTranaites. The page is divided into several sections: Personal Information, App Setup, and Administration Setup. The 'Call Center' field is highlighted with a red arrow, indicating it is the focus of the document. The 'Call Center' field is set to 'Zultys Call Center Adapter Open Ctr 1.0'. Other fields include Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Newsletter, Admin Newsletter, Federation ID, Time-Based Token, Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Force.com Flow User, Site.com Contributor User, Site.com Publisher User, Salesforce Classic User, Mobile Configuration, Mobile Push Registrations, Accessibility Mode, Color-Blind Palette on Charts, Send Apex Warning Emails, Salesforce1 User, Salesforce CRM Content User, Receive Salesforce CRM Content Email Alerts, Receive Salesforce CRM Content Alerts as Daily Digest, Make Setup My Default Landing Page, Force.com Quick Access Menu, Development Mode, Show View State in Development Mode, Low Forecasting, Phone, Extension, Fax, Mobile, Email Encoding, Employee Number, Start of day, End of day, Used Data Space, Used File Space, Last Login, and Last Password Change or Reset.

9 MX Administrator Setup

9.1 MX requirement

Zultys MX firmware version 11 or higher should be installed and MX port 7779 should be opened.

9.2 Create a Certificate

In order for the MX to communicate with Salesforce.com, a digital security certificate must be installed and the user profile should be enabled for CRM access.

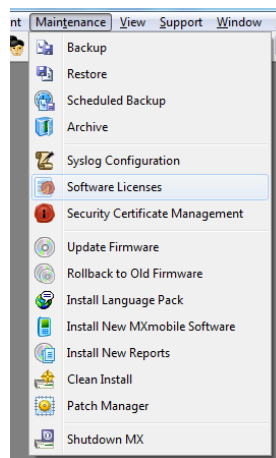
9.3 Enable CRM Access

To support Salesforce integration, 'CRM Access' feature of User Profile in MX Administrator should be enabled (see *Section 8.8* for more information).

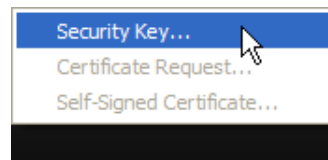
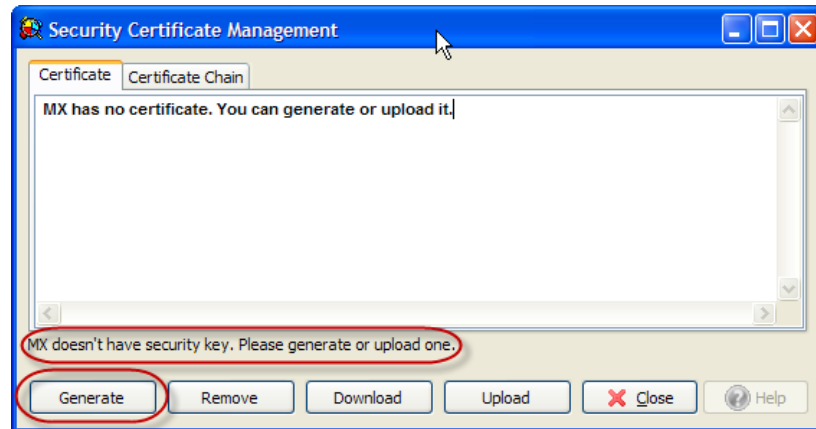
9.4 Generating a Security Key

Generating a security Key is a precursor to generating any one of the certificate types.

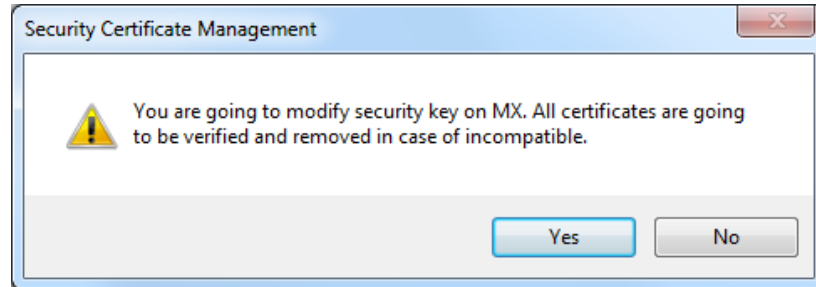
1. In MX Administrator navigate to Maintenance -> Security Certificate Management.



2. Select Generate -> Security Key.
3. Click on **Generate**, and select **Security Key** from the dropdown list.

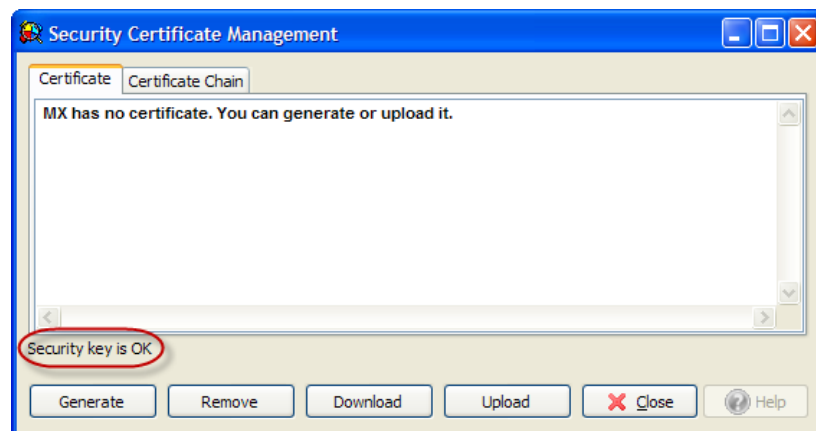


4. Click **OK** in the following popup message.



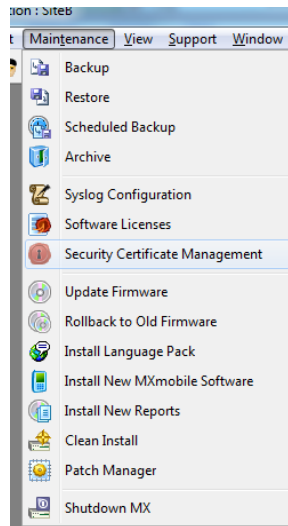
5. Verify Security Key is successfully installed.

Once the Key is generated, the screen updates to reflect this information

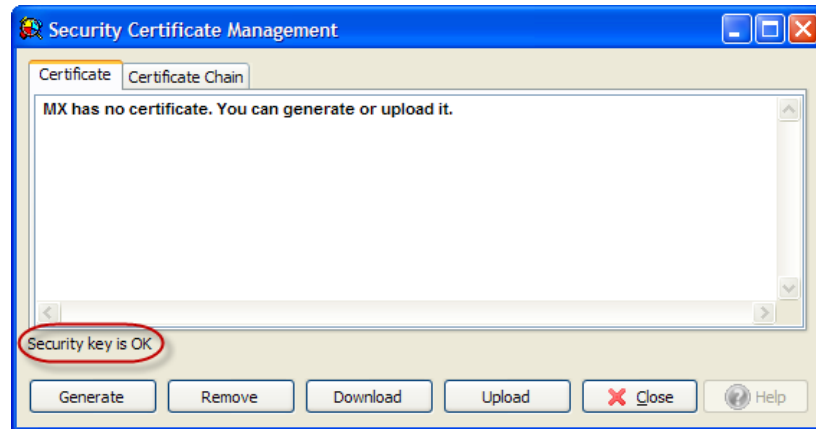


9.5 Generate and Install a Self-Signed Certificate

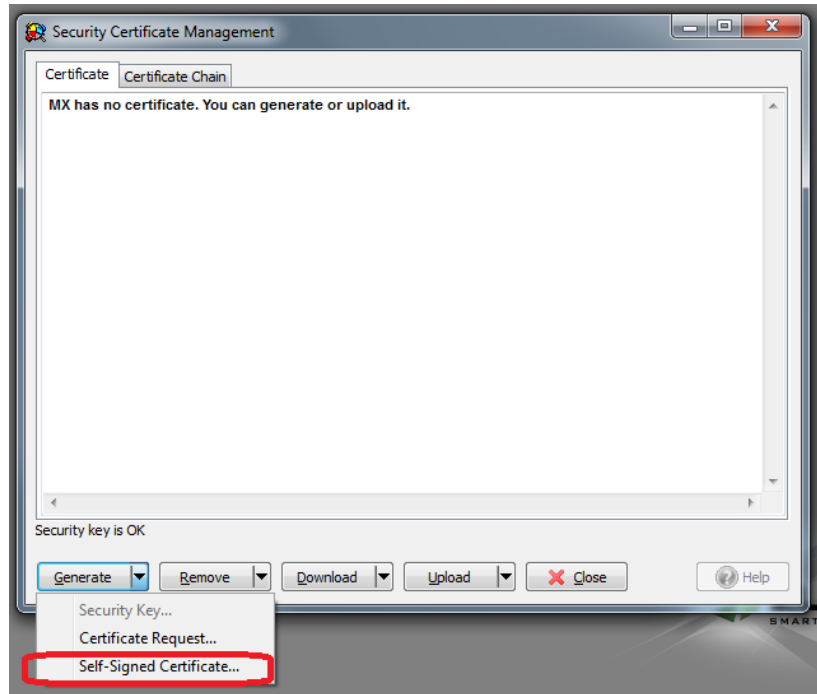
1. In MX Administrator navigate to Maintenance -> Security Certificate Management.



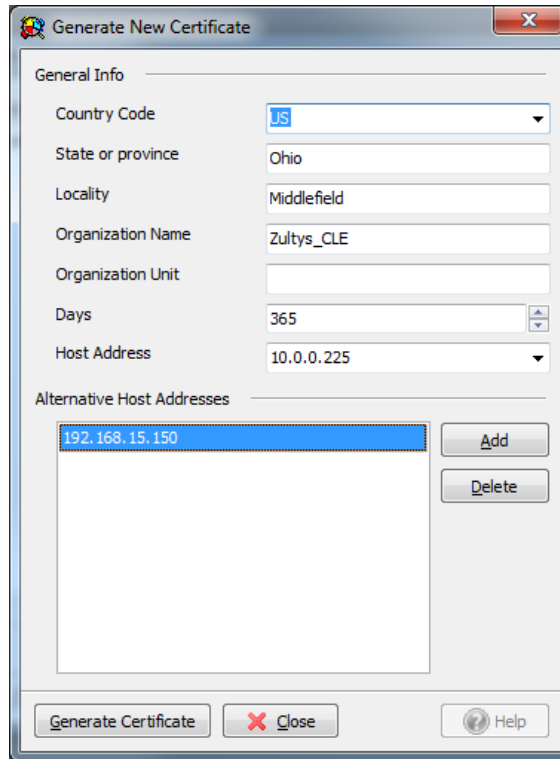
2. Generate Certificate.



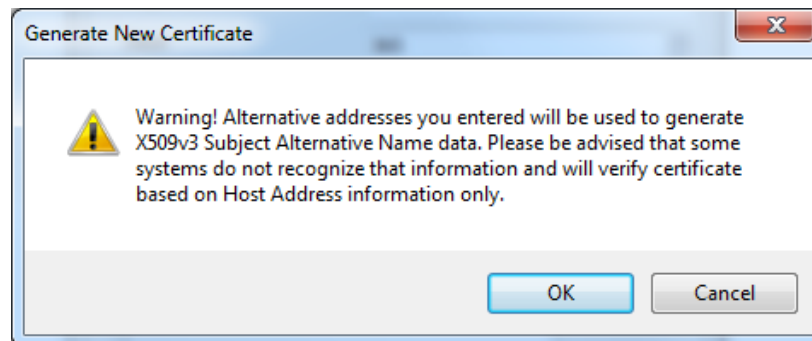
3. Select Generate -> Generate Self-Signed Certificate.



4. Complete the form with necessary information.



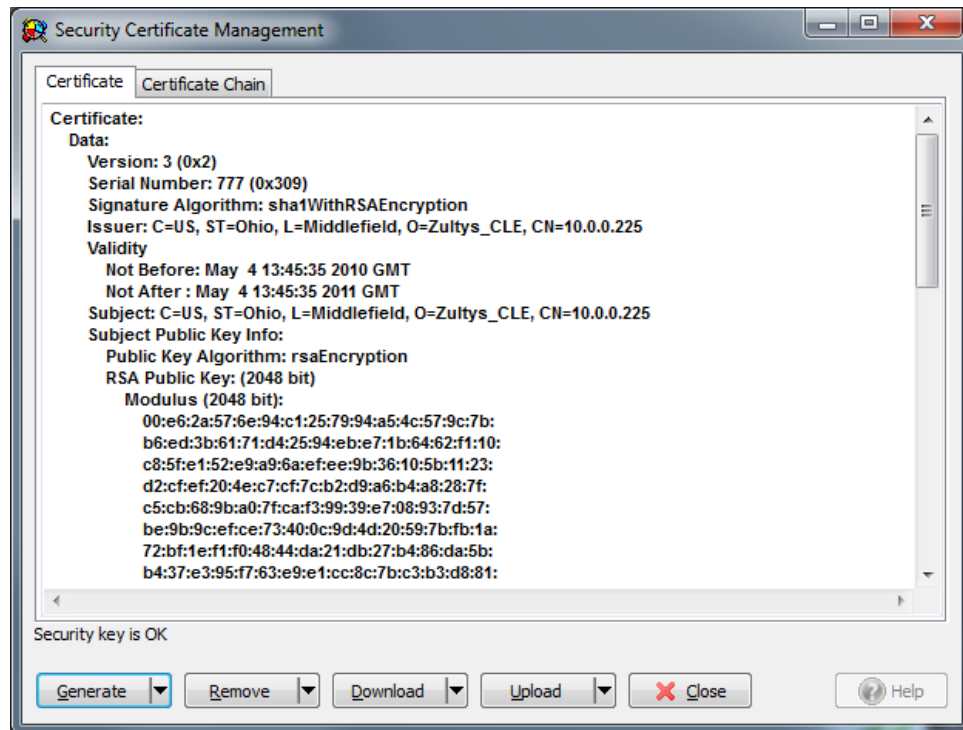
5. Click **Generate Certificate**.
6. Click **OK** to the warning popup up message.



7. Click **OK** in the confirmation popup message.



8. Click **Close**.



9.5.1 Manually Installing Self Signed Certificate

When using a self-signed certificate on the MX you MUST manually install the certificate on each PC using Salesforce.

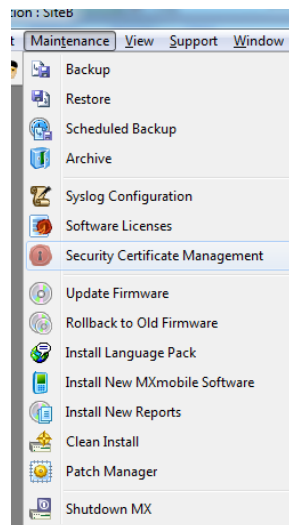
To manually install open your browser and enter in the following URL

```
https://[IP or FQDN of the MX]:7779/
```

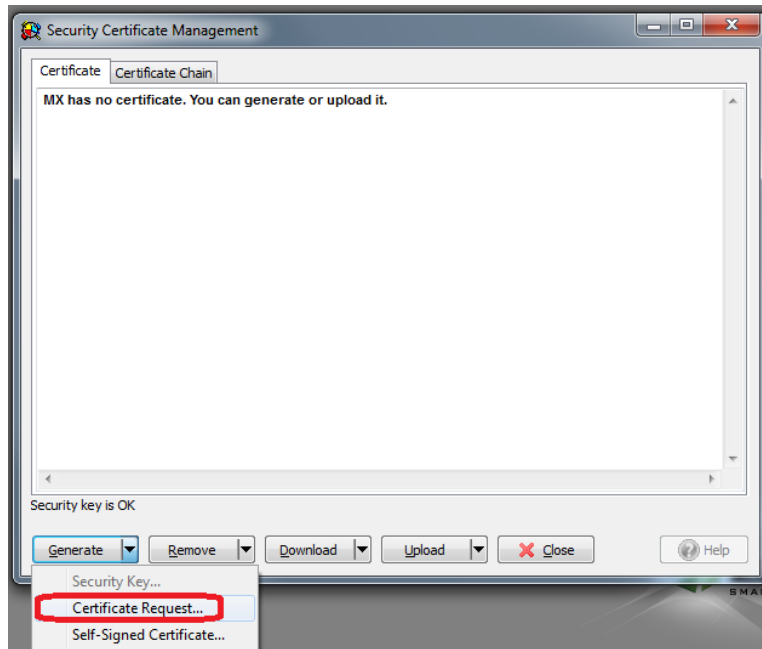
the browser will notify you that the certificate is “not trusted”, create an exception for the MX. No page will actually draw, after a few moments close the browser window. The exception has been created.

9.6 Generate a Request for a Certificate from a Certificate Authority

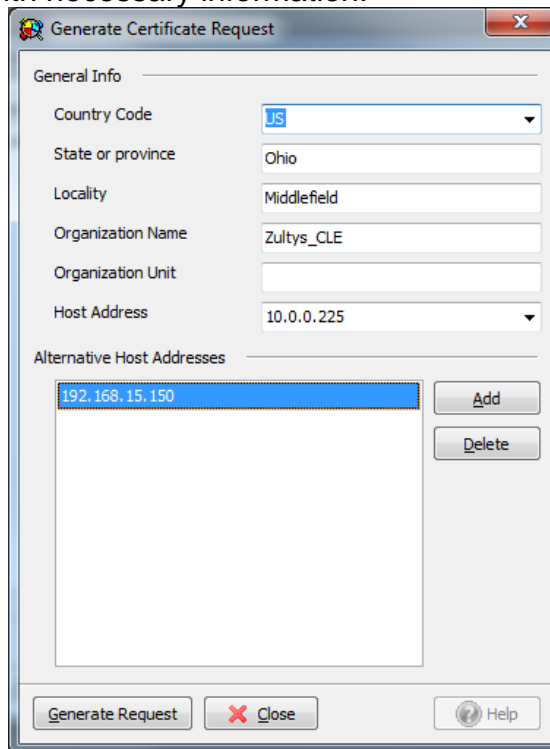
1. In MX Administrator navigate to Maintenance -> Security Certificate Management.



2. Generate a Certificate Request.

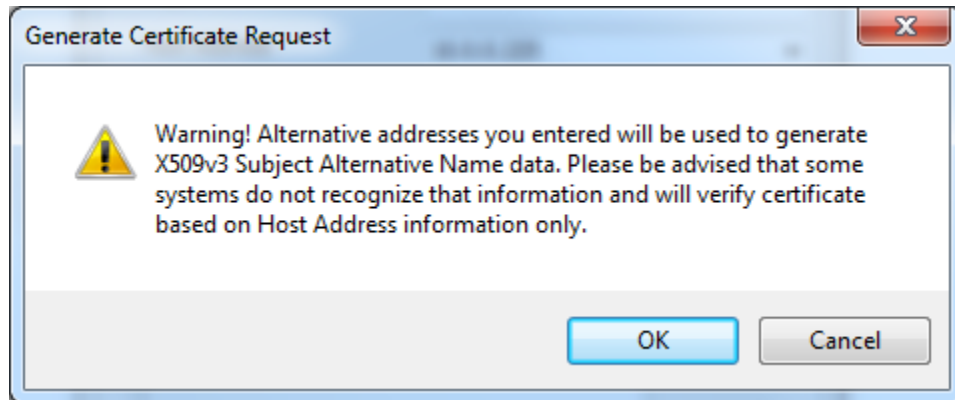


3. Complete the form with necessary information.

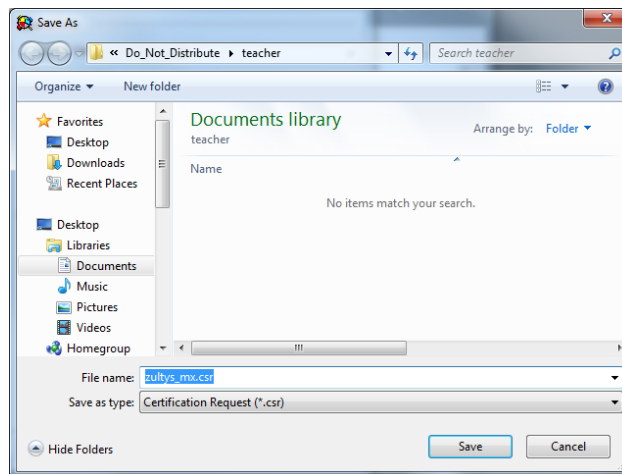


4. Click on Generate Request.

5. Click ok in the warning popup.



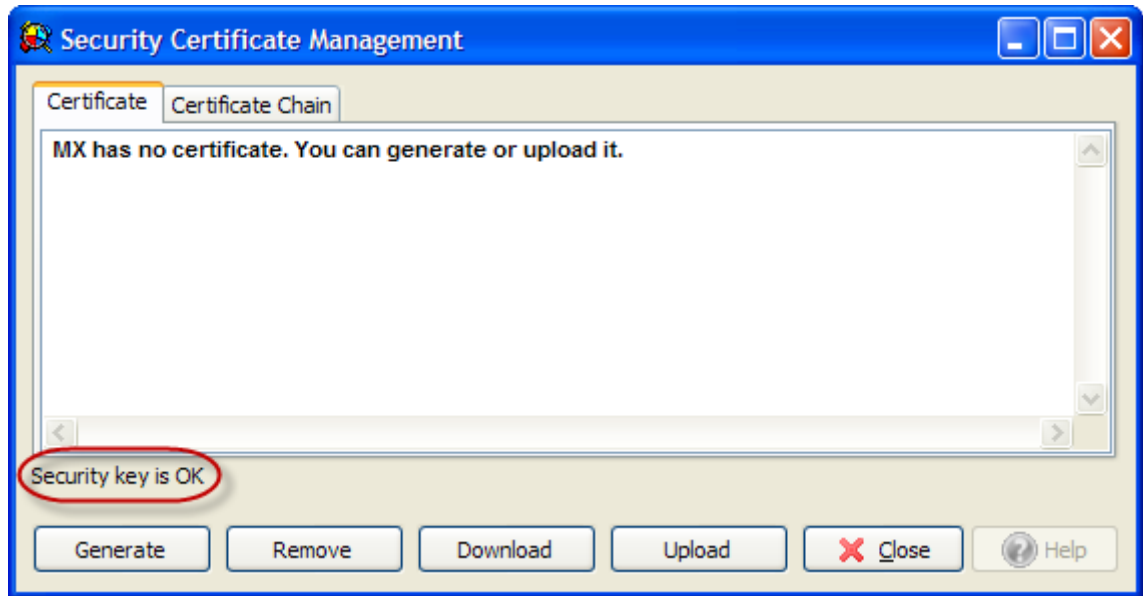
6. Save generated Certificate Request.



7. Purchase online a certificate from a Certificate Authority. When requested, upload the above CSR file.
8. The certificate authority will download your certificate.

9.7 Install a Certificate from a Certificate Authority

In MX Administrator navigate to Maintenance -> Security Certificate Management.



9.7.1 Upload -> Certificate

1. Navigate to certificate file location and select.
2. Certificate is displayed. Check that data shown is correct.
3. If required, upload a certificate chain.

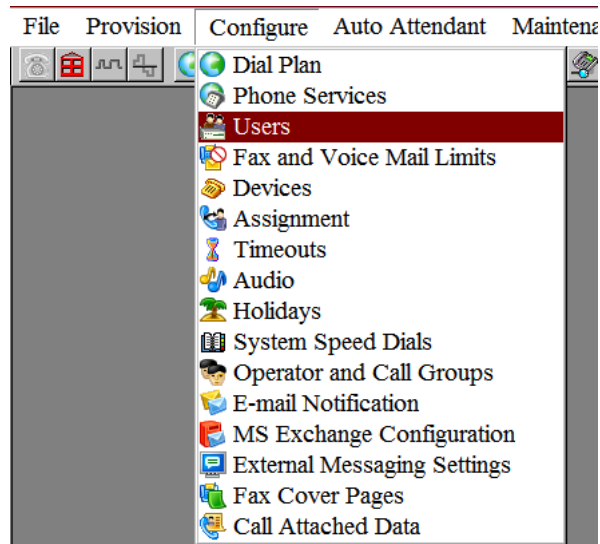
9.7.2 Upload -> Certificate Chain

1. Navigate to certificate file location and select it.
2. Mobile phone connectivity is now enabled.

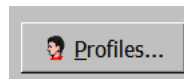
9.8 Enable CRM User Access

For agents to integrate with Salesforce, the MX Administrator must ensure that the **CRM User Access** checkbox is checked within each agent's profile.

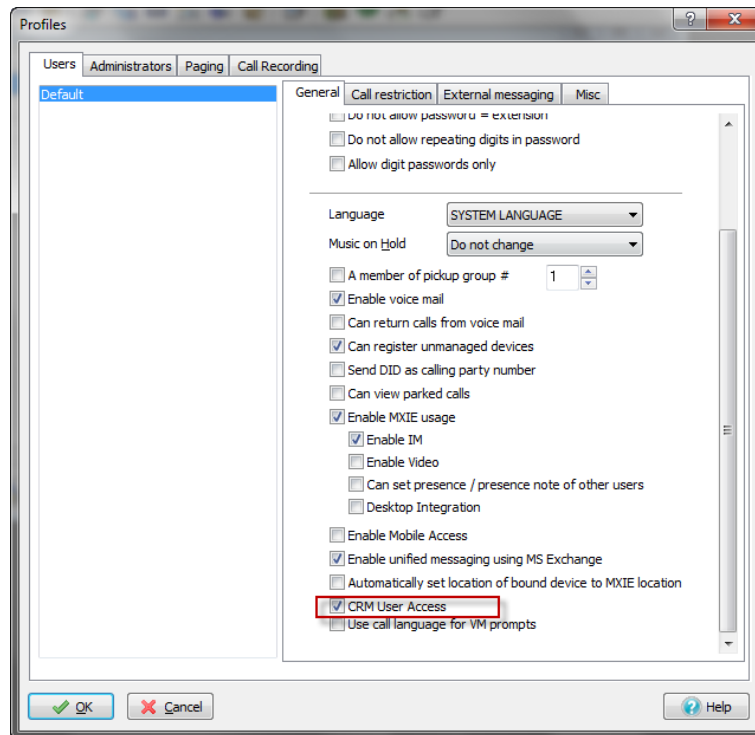
1. In MX Administrator navigate to Configure -> Users.



2. Select Users.



3. Click **Profiles** which is located at the bottom of the resulting screen.
4. Select a profile of a Salesforce user from the list on the left side of the Profiles window



5. Scroll down the list of options on the right side of the window and checkmark **CRM User Access**.
6. Repeat step 5 for all the Profiles for users who use Salesforce Communicator Adapter.

10 Troubleshooting

10.1 Agent is unable to install Zultys Salesforce Communicator software

Installer must have Microsoft Administrator privileges.

10.2 Zultys Salesforce Communicator does not initialize or function

- Make sure port 7779 is open.
- Make sure the certificate is valid.
- Make sure 'CRM Access' is enabled in User Profile section of Zultys MX Administrator.
- Make sure self-signed certificate is installed if using self-signed certificate, see "Manually Installing Self Signed Certificate" earlier in this manual.

10.3 Zultys Salesforce Communicator Log-In Failed

Check that your MX user login information is correct.

10.4 Call does not appear in the Zultys Salesforce Communicator pane window

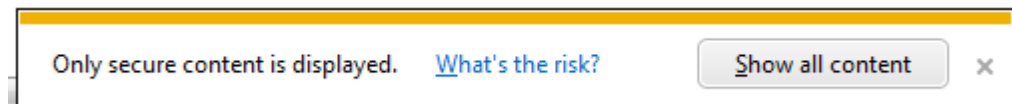
Check that the Zultys Salesforce Communicator software is running.

10.5 The Click-to-Dial feature in Salesforce is disabled

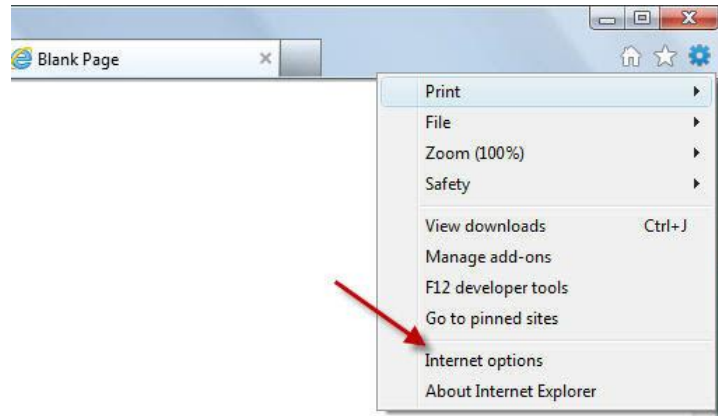
Check that the Zultys Salesforce Communicator is running.

10.6 Disabling Mixed Content Messages in Internet Explorer 9

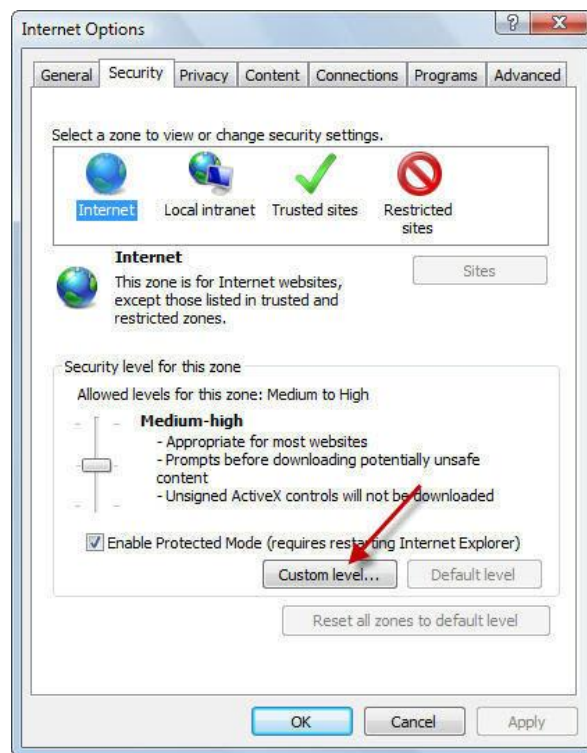
In Internet Explorer 9 a popup warning about "Mixed Content" is displayed.



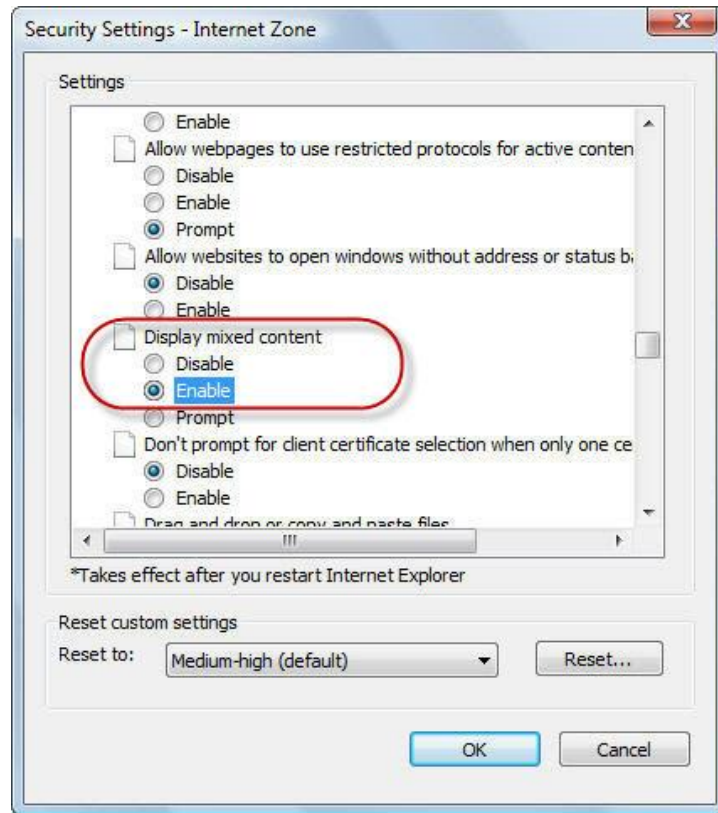
1. Click on the Gear-like toolbar icon in the top-right corner of the Internet Explorer 9. Select **Internet Options** from the popup menu.



2. In the **Internet Options** window, select the **Security** tab.
3. Click on the **Custom level...** button while the **Internet** zone is selected.



4. Scroll down the list of options and select **Enabled** for the **Display mixed content**.



5. Click **OK** twice to save the settings and close all of the options windows.
It is suggested to do this for Internet, Local intranet and Trusted sites.