



# Integrator Salesforce Adapter Guide

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## Introduction

The Salesforce Adaptor for Horizon Integrator allows users to manage calls direct from their Salesforce web page. Alongside this, call records are written direct into a contacts activity and the ability to create contacts from an incoming call is much faster.

This document will go through the process of installing the Integrator Salesforce Adaptor for Horizon and any requirements to do so.

The process carries the following pre-requisites:

- ◆ Access to an Administrator account for Salesforce
- ◆ The Horizon Integrator Client (version 2.5.30.16173 or higher) installed and started
- ◆ Horizon Integrator Client CRM license

Please note: Salesforce Adapter is not supported on Terminal Service environments at present.

## Supported Salesforce Editions

This requires Salesforce to be licensed for the Open CTI API. Please check at:

[https://developer.salesforce.com/docs/atlas.en-us.api\\_cti.meta/api\\_cti/](https://developer.salesforce.com/docs/atlas.en-us.api_cti.meta/api_cti/) or with your Salesforce Account Manager if your version has access to this API.

Please note: Lightning interface does not support Open CTI.

# Installing the Salesforce Adaptor

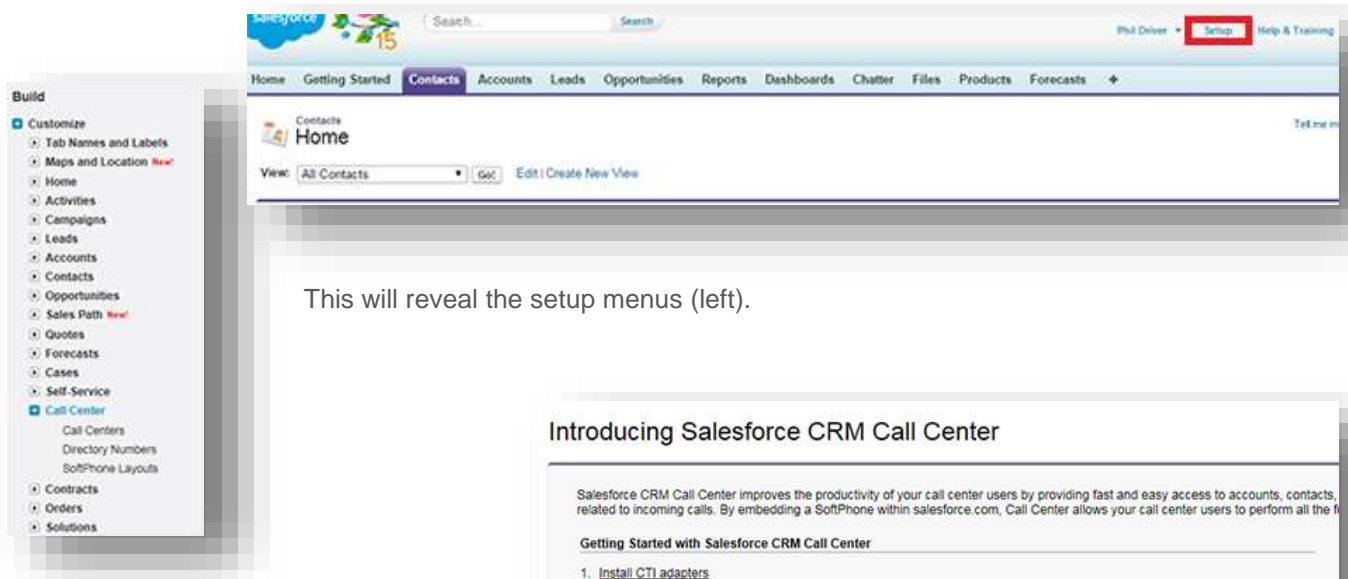
## Step 1: Download the Adapter's definition

1. Go to the following link to download and save the adapter's XML definition file:

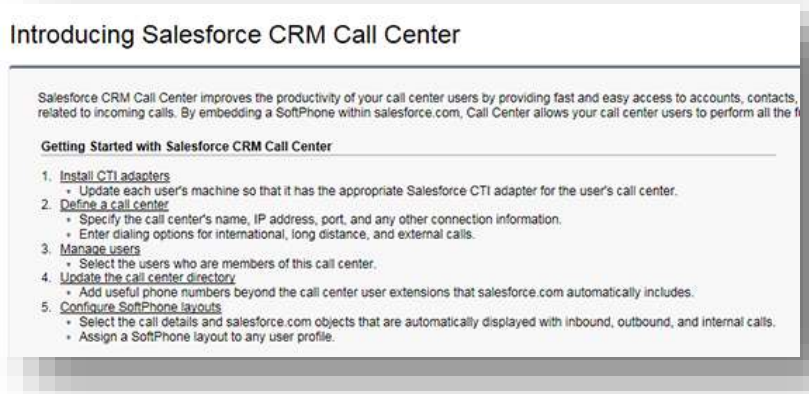
Download Horizon Integrator Salesforce Adapter.

## Step 2: Import the Adapter definition

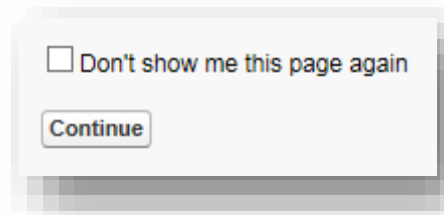
1. Login to Salesforce as an administrator, and click on the 'Setup' link



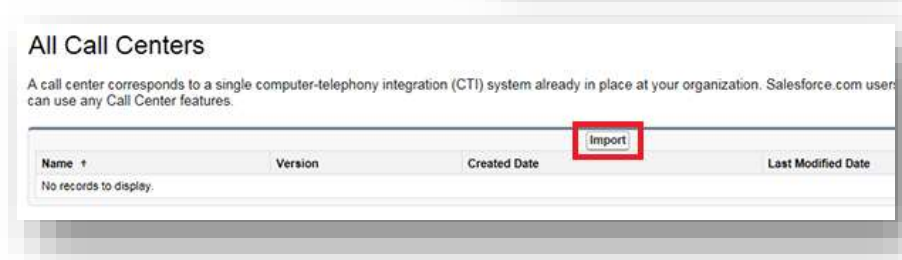
2. Click on 'Call Centers', which you will find in the Customize section of the Build area of the setup menus. This will take you to a screen like the one shown below.



3. Scroll down the screen and click on the Continue button at the bottom. Hint: You might also want to check the "Don't show me" option.



4. You will then see the "All Call Centers" screen, from where you need to click the Import button.

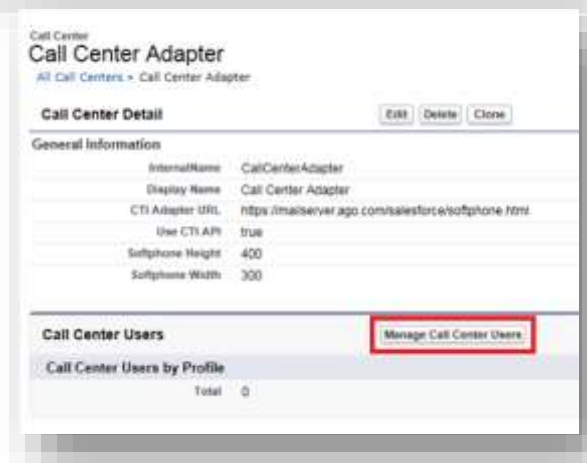


5. Browse and locate the Adapter definition .xml file that you downloaded in Step 1, and then click the Import button.



### Step 3: Manage Call Center Users

1. Once you have completed the import, you will be automatically taken to the Go Integrator Call Center Adapter screen shown here. Click on the 'Manage Call Center Users' button.



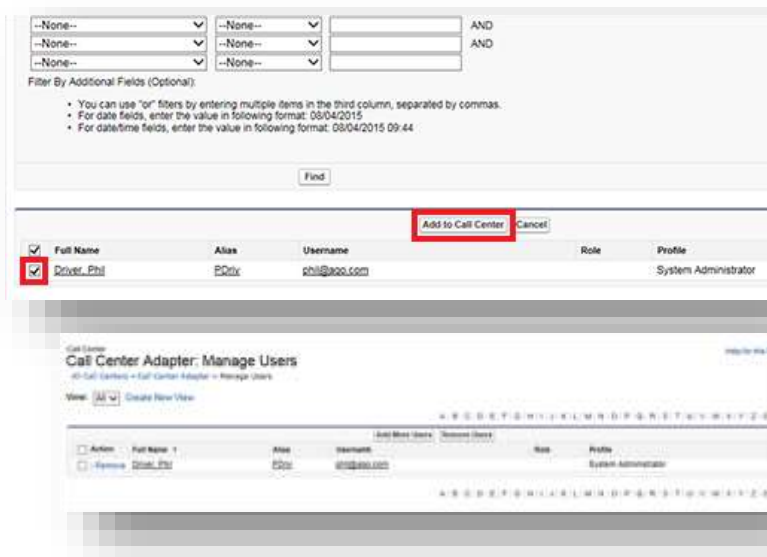
2. In the Manage Users screen, click the 'Add More Users' button to start adding users that you want to have access to the Adapter.



3. Use the search filters to locate the user(s) that you wish to add, or just leave the filters set to none, and then click the 'Find' button.



4. This will reveal your filtered list of users. As shown right, tick the user(s) that you want to add, and then click the 'Add to Call Center' button.



5. When you return to the Manage Users screen, you'll see your selected users listed.



6. When any of the selected users logs into Salesforce and clicks on the HOME page, the Horizon Integrator Softphone panel will appear on the left-hand side of their screen.

## Panel Status

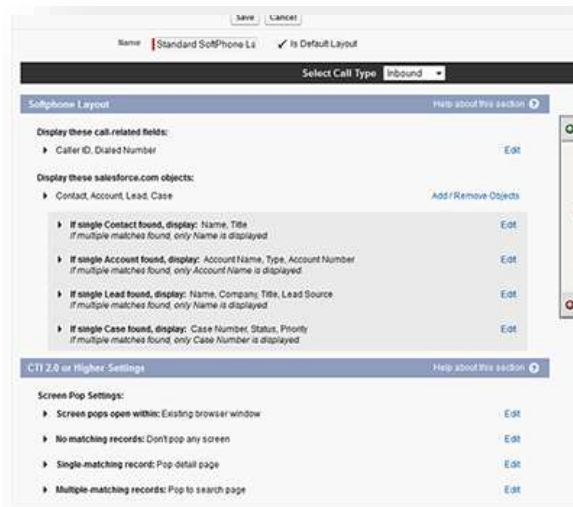
If the user has Horizon Integrator running and a valid CRM level license, their Softphone State will show as 'Available' and they are ready to work with the Softphone.

If the user is experiencing connection issues, or their Horizon Integrator client does not support the Salesforce integration, their state will show as 'Not connected'. See the trouble shooting section for help.

## Configuring Multiple Search Results Feature

To allow the multiple searching to work the admin must enable a setting as follows (see screenshot).

1. Go to Customize - Call Centers - Softphone Layouts
2. Edit the Standard Softphone Layout
3. In section CTI 2.0 or Higher Settings
4. Set "Multiple-matching records" to "Pop to search page" (it defaults to nothing)



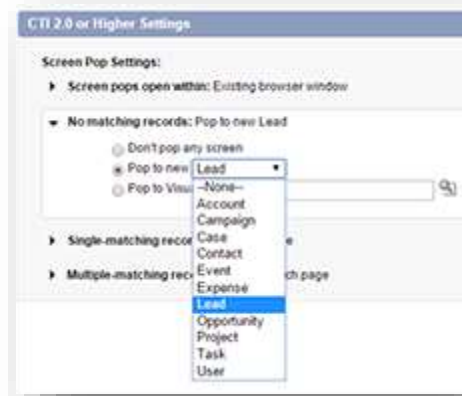
Note: At time of writing Salesforce only allows this setting for Call Type of Inbound.

## Customise "New" Entity

If this setting is not configured, then the "+" button will create a new lead. If not configured it is either "No matching records" is set to "Don't pop any screen" or "Pop to New '-None-'".

Customising the behaviour of the "+" button can be done by selecting another entity in the list.

Note: Different Softphone Layouts can be created and assigned for each user allowing customising of the behaviour for each user. This is not covered here in this guide.



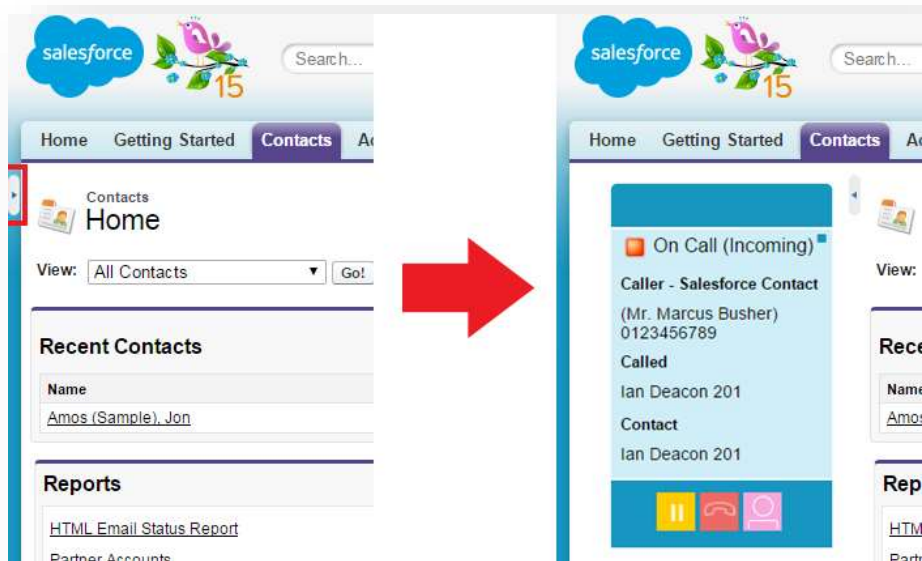
## Trouble Shooting


If the status on the Softphone panel shows as "Not Connected", check the following:

- ◆ Check that the user has their Horizon Integrator client running and connected to their host account
- ◆ Please check that your client meets the prerequisite version for Salesforce Adapter
- ◆ Check that the user has a valid CRM license assigned to them, and that they have "CRM" selected as the License Type in their client configuration

If the Softphone panel does not appear for a user:

- ◆ Check that the user is assigned to use the Horizon Integrator Salesforce Adapter (they should be listed in the Manage Users page shown in Step 3 above)
- ◆ As shown here, check that the user has expanded the "hidden" window, as the Softphone panel might not be visible by default





If multiple contacts found and search button does not work:

- ◆ You should check section "Configuring Multiple Search Results Feature" above

## Optional Configuration

Install this Salesforce apex class in order to include the users Timezone in the Call History subject, for example:

- ◆ Inbound Call at 16:11:36 Europe/London from 07814256404 (Fred Bloggs)
- ◆ Inbound Call at 16:14:28 Asia/Hong Kong from 01202528735 (John Smith)
- ◆ Inbound Call at 16:14:50 Asia/Hong Kong from 01202528732 (Bournemouth)

Note: If the apex class is not installed the softphone will work as usual however will not show a Timezone in the subject.

## To Install the Salesforce Apex Class

- ◆ Go to Setup -> Build -> Develop -> Apex Classes.
- ◆ Select New Apex Class.
- ◆ Paste the below code to the edit box and save.

```
global class GetCurrentUser{
    webservice static String getUserTimeZone() {
        TimeZone tz = UserInfo.getTimeZone();
        return tz.getDisplayName();
    }

    webservice static String getUserId() {
        return UserInfo.getUserId();
    }
}
```