


Oct 27, 2020 21:00

## Salesforce Lightning Integration - User Guide - English

 This guide will lead you through the process of Salesforce Lightning integration usage, starting from a Softphone installation and activation, and ending with practical examples for call receiving.

Requirements:

- [WMS](#) version: 4.01 or higher
- Wildix [UC-Business](#) or [UC-Premium](#) license
- Installed [WIService](#)
- Salesforce license with access to the Lightning Platform

Created: June 2019

Updated: July 2020

Permalink: <https://confluence.wildix.com/x/CgCqAg>

### Features

- Click-to-call
- Incoming call popup
- Outgoing call popup
- Dialpad
- Search Bar for contacts
- Auto-detect existing contact and redirect to his page

- [Link to the application](#)
- [Setup Call enter](#)
  - [Setup](#)
  - [Switch](#)
- [Application Usage](#)
- [Make a Call](#)
  - [Making a Call by Dialing a Number Manually](#)
  - [Making a Call Using Click-to-Dial](#)
- [Answer a Call](#)



## Link to the application

The integration is available for the installation through the [Salesforce AppExchange](#)

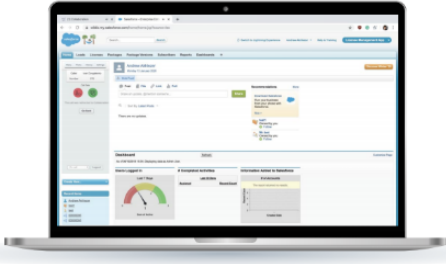
ALL APPS

Wildix for Salesforce | CTI | VoIP | UCC | Cloud | PBX | Telephony

By Wildix EE OÜ

**Wildix and Salesforce:**  
Engage, Convert and Win  
Your UC&C meets the #1 CRM



1 of 9 : Salesforce and Wildix integration

**€15 EUR per user per month** Get It Now

RATING	LISTED ON	LATEST RELEASE
★★★★★ (0)	7/1/2020	11/28/2019

▶ Watch Demo

Increase productivity and boost workplace efficiency. Wildix for Salesforce enhances your CRM experience by integrating your Wildix PBX with your Lightning or Classic Salesforce interface.

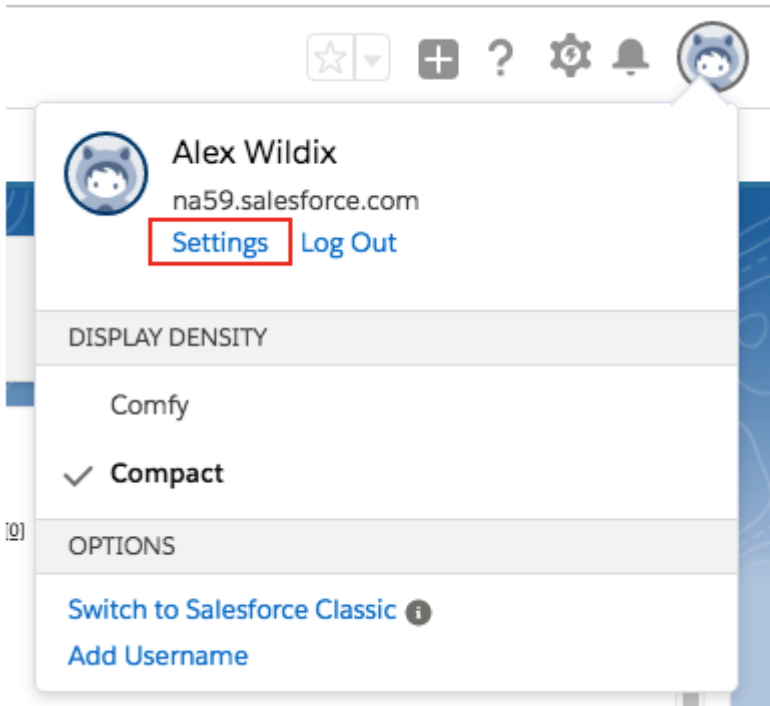
Click-to-call | Call popup | Dialpad | Search Bar for contacts | Create a contact of an unknown number

[Overview](#) [Reviews](#)


## Setup Call enter

### Setup

#### Step - 1



☆ + ? ⚙️ 🔔 👤



**Alex Wildix**  
na59.salesforce.com

Settings [Log Out](#)

DISPLAY DENSITY

Comfy

✓ **Compact**

OPTIONS

[Switch to Salesforce Classic](#) ⓘ

[Add Username](#)

- 1 - Click on your **profile**
- 2 - Go to the **Settings** page

## Step - 2

My Personal Information

- Advanced User Details
- Approver Settings
- Authentication Settings for External Systems
- Change My Password
- Connections
- Grant Account Login Access

User  
**Alex Wildix**

Permission Set Assignments (0) | Permission Set Assignments: Activation Required (0) | Permission Set License Assignments (0) | Personal Installed Mobile Apps (0) | Authentication S

User Detail

**Edit** **Sharing** **Change Password**

Name	Alex Wildix
Alias	
Email	
Username	
Nickname	

- Choose **Advanced User Details** subcategory
- Press the **Edit** button
- Scroll down to **Call Center** field and press the **Magnifier** button

Digest

Allow Forecasting

**Call Center**

Phone

Extension

Fax

Mobile

## Step - 3

**Lookup**

Search... **Go!**

You can use **\*\*** as a wildcard next to other characters to improve your search results.

**Search Results**

Name	Version	Created Date	Last Modified Date
<a href="#">Wildix Classic Call Center</a>		6/12/2019 3:59 AM	6/12/2019 3:59 AM
<a href="#">Wildix Lightning Call Center</a>		6/12/2019 3:59 AM	6/12/2019 3:59 AM

You see a popup with two options:

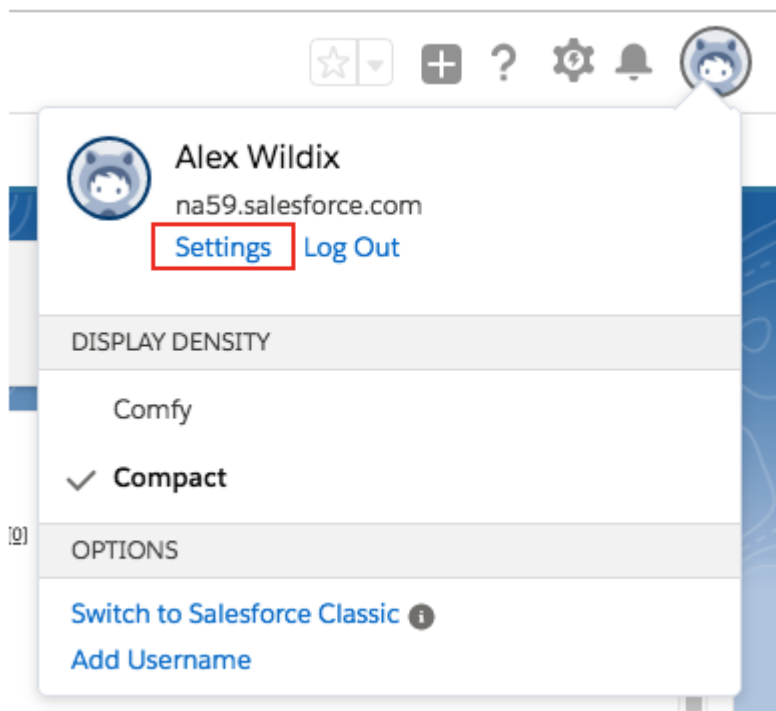
- Wildix Classic Call Center - will work only for Classic interface
- Wildix Lightning Call Center - will work only for Lightning version

Choose **Wildix Lightning Call Center** and click Save.

## Switch

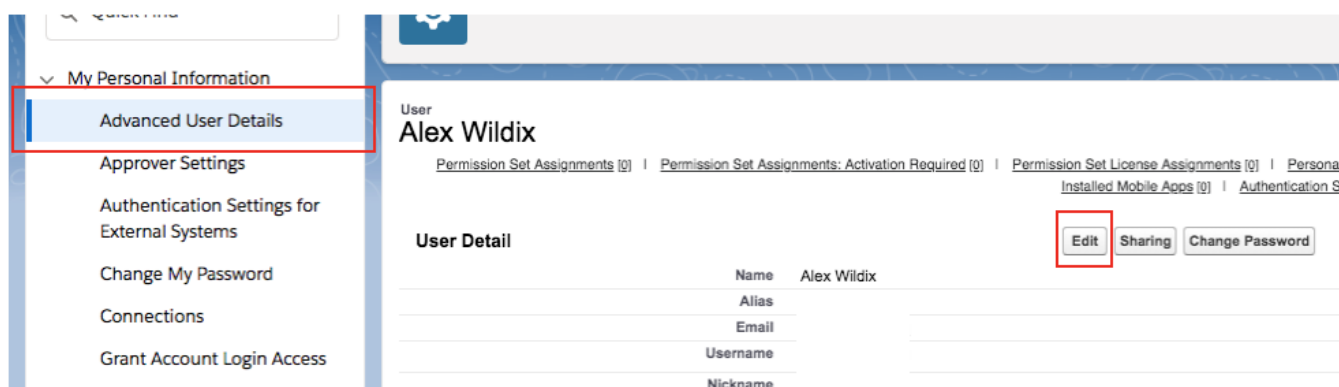
In order to switch for Salesforce Classic, you also need to choose Classic Call Center.

### Step - 1



- 1 - Click on your **profile**
- 2 - Go to the **Settings** page

### Step - 2



- Choose **Advanced User Details** subcategory
- Press the **Edit** button
- Scroll down to **Call Center** field and press the **Magnifier** button

Content Alerts as Daily Digest

Allow Forecasting

Call Center

Phone

Extension

**Step - 3**

**Lookup**

You can use "\*" as a wildcard next to other characters to imp

**Search Results**

Name	Version
<a href="#">Wildix Lighten Call Center</a>	

Copyright © 2000-2019 s

You see a popup with only one option. Click on **Clear Search Results** for:

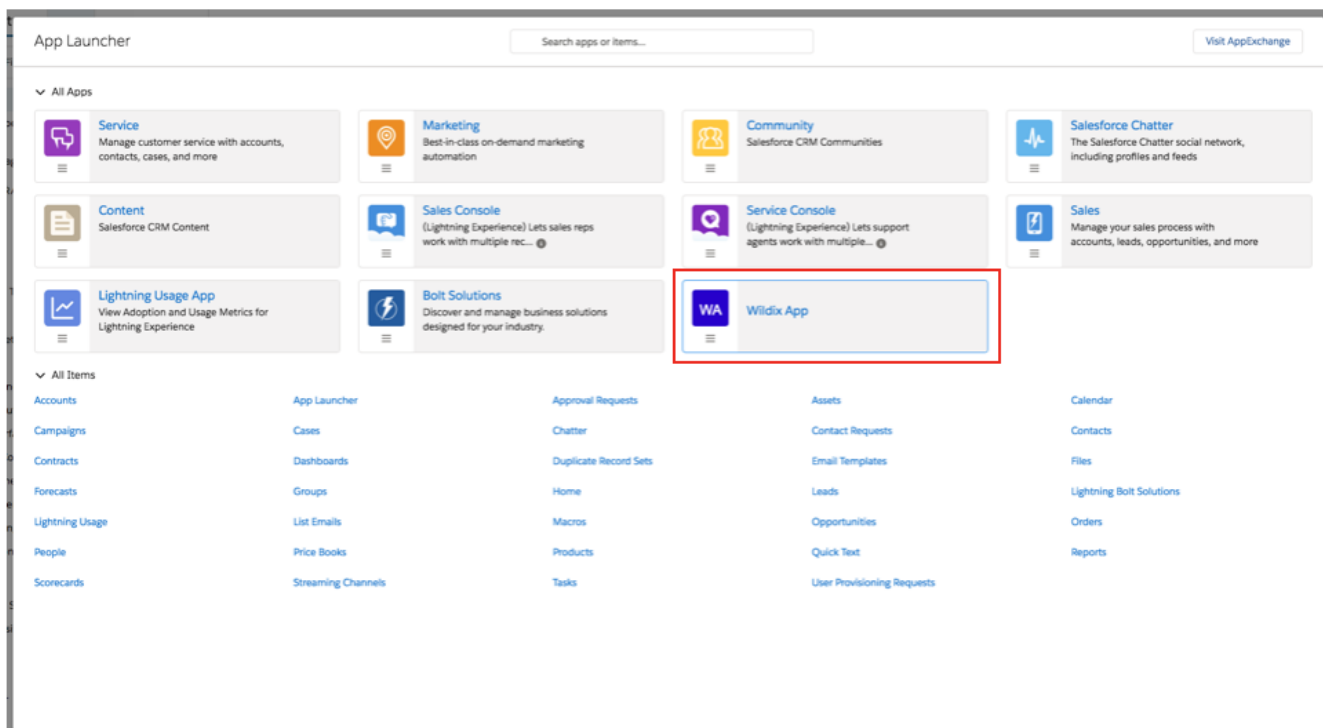
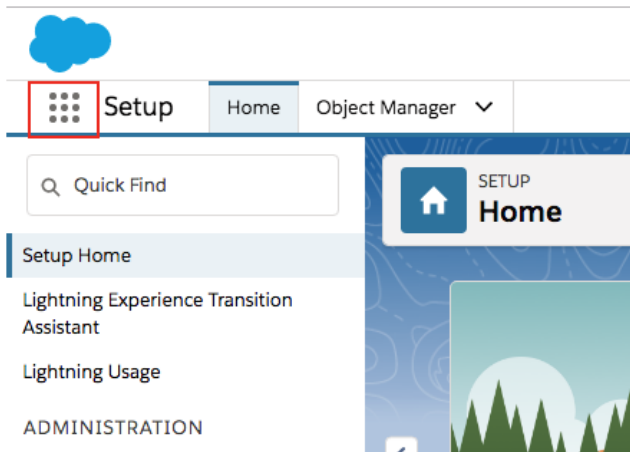
- Wildix Classic Call Center - will work only for Classic interface
- Wildix Lightning Call Center - will work only for Lightning version

Choose **Classic Call Center** and click Save

## Application Usage

Keep the Collaboration open while working with app


Once you choose the Phone Center you can access the application via App Launcher

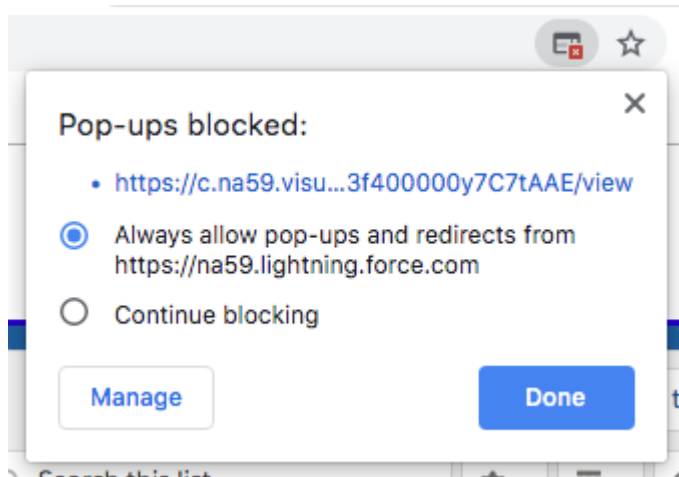


The main page of the application contains [tabs](#) and modal window with dialer and search

### Dialer settings

- Enable auto-opening of found contacts
- Enable auto-opening of found contacts when receiving an incoming call

 By default, Google Chrome does not allow pop-ups. Click on the icon in the browser bar and change it



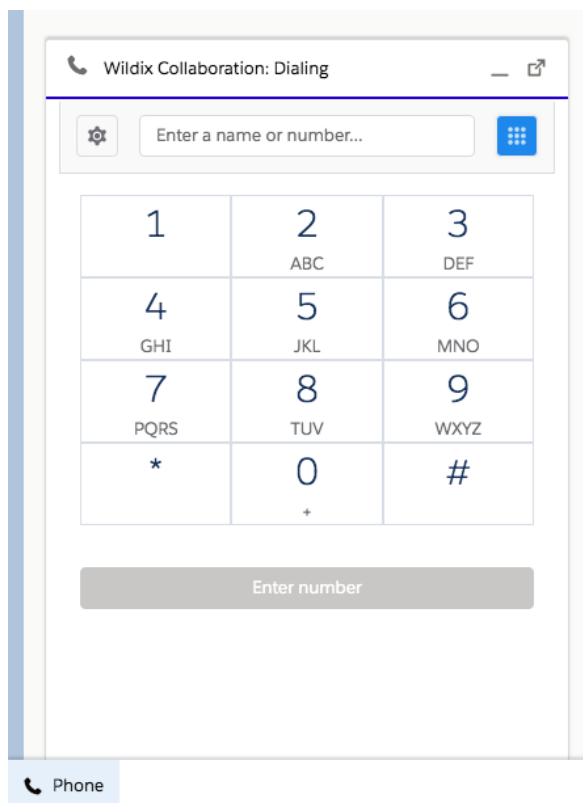
## Make a Call

⚠ Keep Collaboration open while working with the application




### Making a Call by Dialing a Number Manually

To make a call with integration by manually dialing a number:


1. In the Application, click on the **Phone** button on the left-bottom corner.
2. Click on the dial-pad button on the right of the search bar.
3. Enter the phone number that you want to dial by clicking the number buttons on the dial-pad, or by typing numbers in the search field with your keyboard.
4. Click **Dial** or press the Enter key on your keyboard.



## Making a Call Using Click-to-Dial

1. Locate the number that you want to dial in a onctacts, Accounts or Leads.
2. Click the  button or the number. The number is automatically dialed in the softphone (Collaboration application).
  - A number that has already been clicked cannot be clicked again for five seconds.
  - The  button does not appear next to fax numbers.
  -  icon displays if you have trouble with connection to collaboration

## Answer a Call

 Keep Collaboration open while working with the application

You can tell that you have an incoming call if you see a flashing red button near your tab name on the browser. It also plays the ringtone.

Details about the call, if any, are displayed just above the **Answer** button, and typically include the phone number of the caller and the number that the caller dialed to reach you. When the caller's phone number can be matched with a number in an existing Salesforce record, that record is also displayed in a new tab.

To answer an incoming call, just press the green button

