


Oct 27, 2020 21:38

Salesforce Classic Integration - User Guide - English

 This guide will lead you through the process of Salesforce Classic 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
- Salesforce license with access to the Classic Platform
- Your salesforce domain should be [whitelisted](#) on the PBX

Created: June 2019

Updated: October 2020

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

Features

- Click-to-call
- Call History
- Search Bar for the contacts
- Auto-detect existing contact and redirect to his page



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

Link to the application

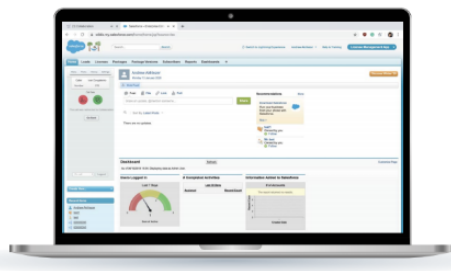
The integration is available for the installation through the [Salesforce AppExchange](#)

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.

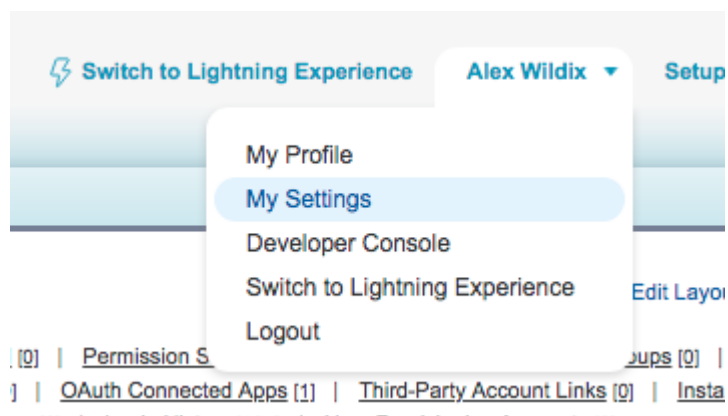
Click-to-call | Call popup | Dialpad | Search Bar for contacts | Create a contact of an unknown number

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

Call enter

Setup

Step - 1



- 1 - Click on your **Profile name**
- 2 - Go to the **My Settings** page

Step - 2

Quick Find

My Settings

- Personal**
- Personal Information
- Change My Password
- Language & Time Zone
- Grant Account Login Access
- My Groups
- Reset My Security Token
- Connections
- Login History
- Approver Settings
- Advanced User Details

Advanced User Details

[Permission Set Assignments \(0\)](#) |
 [Permission Set Assignments: Activation Re](#)
[Queue Membership \(0\)](#) |
 [Team \(0\)](#) |
 [Managers in the Role Hiera](#)
[Authentication Settings for External](#)

User Detail


[Edit](#)

Name	Alex Wildix
Alias	
Email	
Username	
Nickname	
Title	
Company	Wildix2
Department	
Division	
Address	US
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

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

Digest

Allow Forecasting

Call Center 

Phone

Extension

Fax

Mobile

Step - 3

Lookup

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

Search Results


Name	Version	Created Date	Last Modified Date
Wildix Classic Call Center		6/12/2019 3:59 AM	6/12/2019 3:59 AM
Wildix Lightning Call Center		6/12/2019 3:59 AM	6/12/2019 3:59 AM

You see a popup with two options:

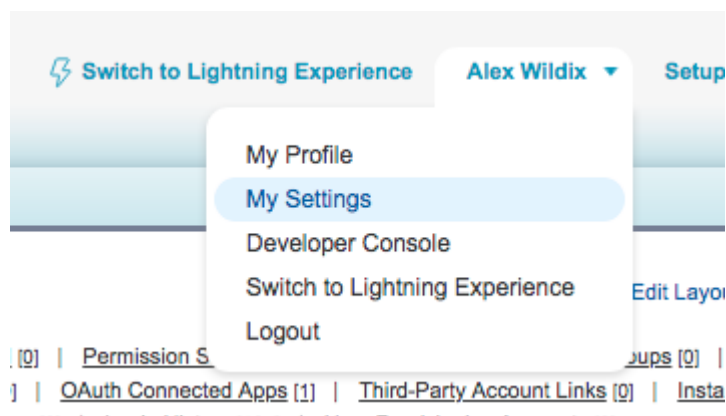
- Wildix Classic Call Center - will work only for Classic interface
- Wildix Lightning Call Center - will work only for Lightning version

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

Switch

 In order to switch to **Salesforce Lightning** you also need to change **Lighten Call Center**.

Step - 1



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

Step - 2

Advanced User Details

[Permission Set Assignments \(0\)](#) |
 [Permission Set Assignments: Activation Re](#)
[Queue Membership \(0\)](#) |
 [Team \(0\)](#) |
 [Managers in the Role Hiera](#)
[Authentication Settings for External](#)

My Settings

- Personal**
- Personal Information
- Change My Password
- Language & Time Zone
- Grant Account Login Access
- My Groups
- Reset My Security Token
- Connections
- Login History
- Approver Settings
- Advanced User Details
- Authentication Settings for

User Detail

Edit

Name	Alex Wildix
Alias	
Email	
Username	
Nickname	
Title	
Company	Wildix2
Department	
Division	
Address	US
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

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

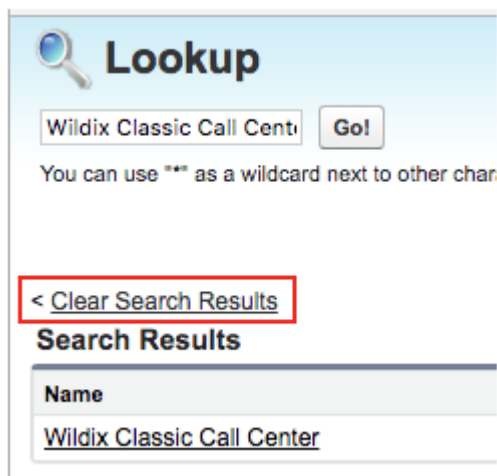
Allow Forecasting

Call Center

Phone

Extension

Step - 3



Lookup

Wildix Classic Call Centi

You can use "*" as a wildcard next to other char

[< Clear Search Results](#)

Search Results


Name
Wildix Classic Call Center

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

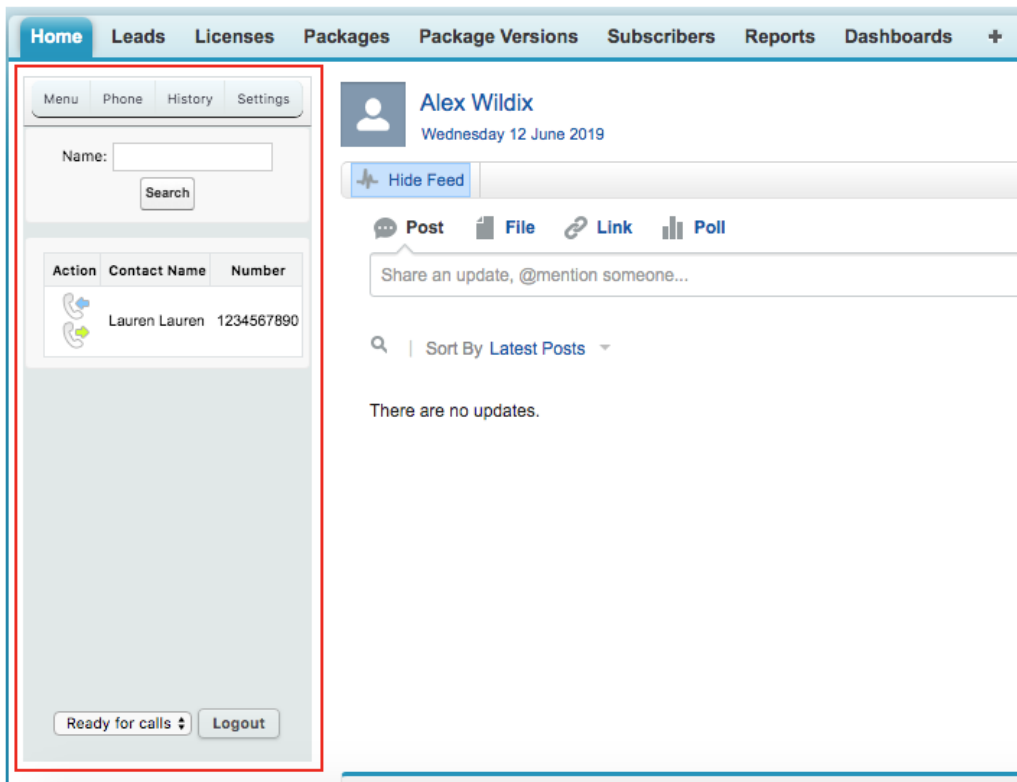
- Wildix Classic Call Center - will work only for Classic interface
- Wildix Lighten Call Center - will work only for Lightning version

Choose Lighten and click Save

Application Usage

 Keep Collaboration open while working with the app.

Once you have ended the setup process you can access the application on the left side of the page from all tabs except Reports and Dashboards.




Home Leads Licenses Packages Package Versions Subscribers Reports Dashboards +

Menu Phone History Settings

Name:

Search

Action	Contact Name	Number
	Lauren Lauren	1234567890

Ready for calls

Alex Wildix
Wednesday 12 June 2019

Hide Feed

Post File Link Poll

Share an update, @mention someone...

Sort By Latest Posts

There are no updates.

The application contains four tabs:

Menu

Main tab of the application

- Search bar for Contacts
- Search Results with contacts info and **Click-to-call** function

Phone

This tab is opening automatically if you have a call

- Shows caller info
- Suggest to add in the contact list

History

#	Name	Date	Time
03362227000	William	6/12/2019	12s
05127576000	Ada	6/12/2019	54s
05127576000	Rose	6/12/2019	1m 12s

Clear


List of previous calls with:

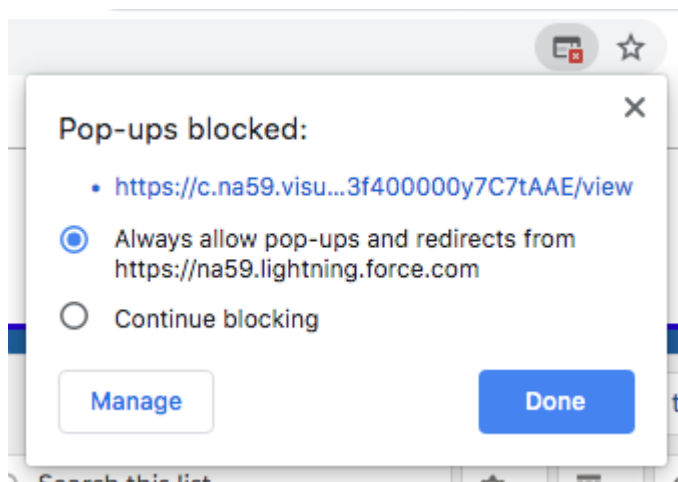
- Phone number
- Name of contact
- Data of call
- Duration of a call

Dialer settings


Application has two checkboxes

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

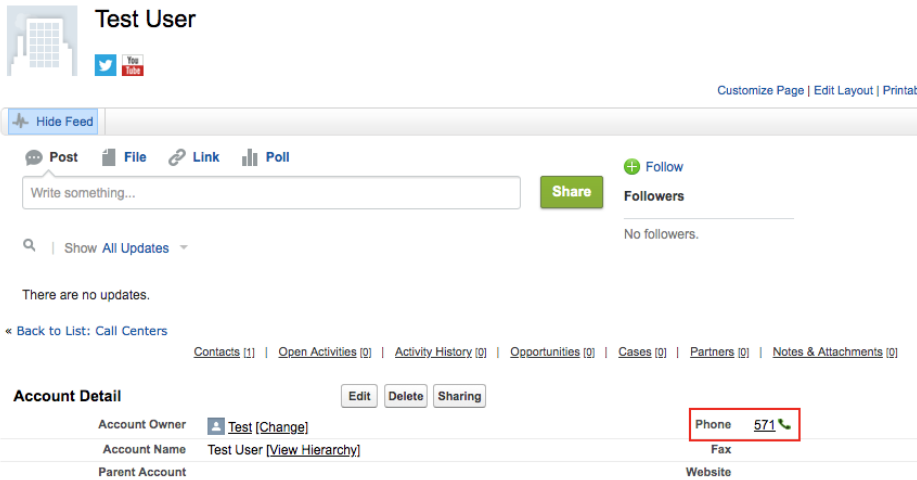
 By default, Google Chrome does not allow pop-ups. Click on the error icon on the Address bar and change it.



Make a Call

 Keep the Collaboration open while working with the application.

Making a Call by Click-to-Dial



Test User

Customize Page | Edit Layout | Print

Hide Feed

Post File Link Poll

Write something... Share Follow

No followers.

Show All Updates




There are no updates.

Back to List: Call Centers

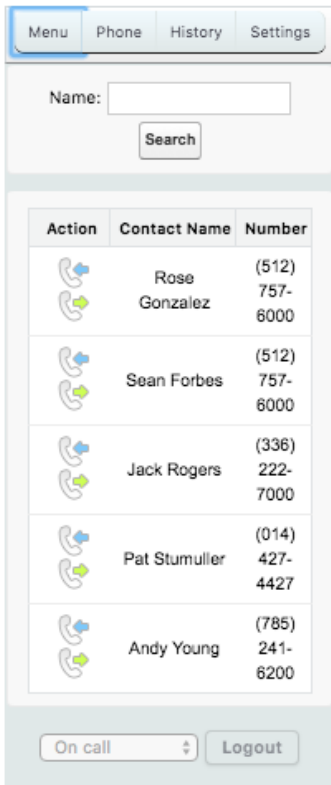
Contacts (1) | Open Activities (0) | Activity History (0) | Opportunities (0) | Cases (0) | Partners (0) | Notes & Attachments (0)

Account Detail Edit Delete Sharing

Account Owner	Test (Change)	Phone	571
Account Name	Test User (View Hierarchy)	Fax	
Parent Account		Website	

1. Locate the number that you want to dial in the Contact Page.
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






Making a Call by Application



Menu Phone History Settings

Name:

Search


Action	Contact Name	Number
	Rose Gonzalez	(512) 757-6000
	Sean Forbes	(512) 757-6000
	Jack Rogers	(336) 222-7000
	Pat Stumuller	(014) 427-4427
	Andy Young	(785) 241-6200

On call Logout

1. Go to the **Menu** tab.
2. **Search** for the right contact.

- By using the search bar.
 - By choosing from previous calls.
3. **Call** it by pressing.
- Action icon.
 - Contact name.
 - Contact number

Answer a Call

 Keep the Collaboration open while working with the application

For accepting an incoming call you have to open Collaboration. A call dialog window is displayed when there is an incoming call:

- To answer a call: click the green **Handset** icon
- To decline a call: click the **Hang up** (red) icon

You can set up automatic call forwarding based on user status (available, DND, away) and call type (internal, external, whitelist, blacklist). See chapter: [Features](#).