

joda Client

Overview

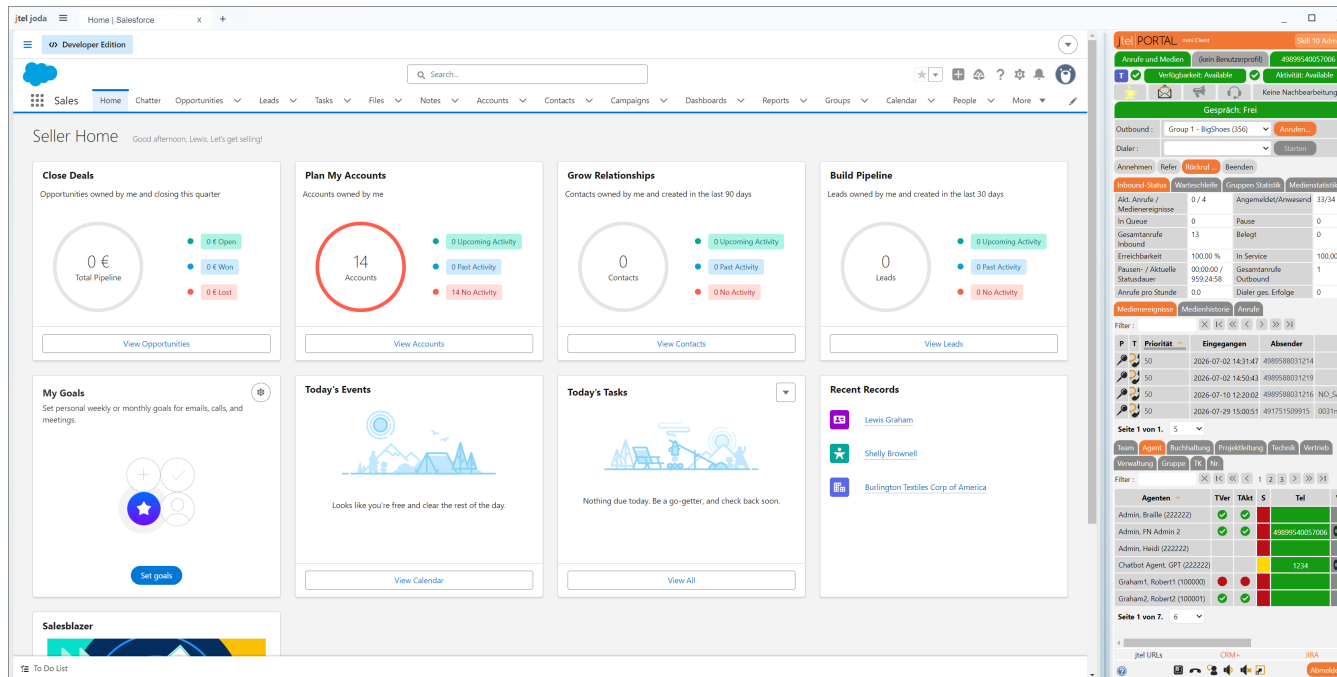
jtel joda is a Windows desktop application for users who work with both Salesforce and the jtel Portal mini client. It provides an alternative desktop workflow for integrations that previously depended on Salesforce OpenCTI.

The application presents two web workspaces in one window:

- **Salesforce** is displayed on the left in a Chrome-style tabbed workspace.
- The jtel Portal Mini Client is displayed in a narrower pane on the right.

jtel joda connects the two systems in both directions:

- Clicking a telephone number in Salesforce starts click-to-dial through the jtel client.
- Receiving a call in jtel opens the relevant Salesforce record in a new tab.
- If only a telephone number is available, jtel joda opens a Salesforce search for that number.
- An incoming call can display a rich desktop notification and play a configurable ringtone.



Installation

Requirements

Before installation, confirm that the user has:

- A Windows x64 computer.
- Network access to the required Salesforce organization.
- Network access to the jtel Portal mini client.
- Valid Salesforce and jtel user accounts.
- Permission to install a per-user Windows application, or assistance from IT.

jtel joda does not implement its own Salesforce or jtel authentication. Users sign in to the normal web login pages displayed inside the application.

Installing jtel joda

1. Obtain the current jtel joda Setup .exe installer from here: <https://cdn.jtel.de/downloads/joda/>
2. Close an older running version of jtel joda before upgrading.
3. Run the installer.

The installer is per-user by default. Each Windows user receives an independent application profile and configuration.

First Start

On first start, jtel joda creates a runtime configuration for the current Windows user. If required URLs are missing or still contain placeholder values, Settings opens automatically.

Recommended first-start sequence:

1. Configure the **General** tab.
2. Configure the **Salesforce** tab.
3. Test the Salesforce URL templates.
4. Select **Save and Reload**.
5. Sign in to Salesforce in the left pane.
6. Sign in to the jtel system in the right pane (use "Remember Me" to save the login for the next start)
7. Make one inbound and one outbound test call.

Salesforce and jtel use separate persistent sessions. Session cookies normally survive an application restart, but users may still be asked to sign in again because of logout, expiry, multi-factor authentication, or organizational security policy.

Settings

Open Settings in either of these ways:

- Press **Ctrl+,** (Control + Comma)
- Open the application menu and select **File > Settings**

General Settings

Setting	Details	Example Value
jtel System URL	This is the address of the jtel Portal mini client displayed in the right pane.	https://my_jtel_system_url/CarrierPortal/mclogin/

Right Pane Width Percent	This controls how much of the main window is assigned to the jtel pane. • A smaller value gives Salesforce more room. • A larger value gives the jtel mini client more room. • The application prevents either pane from becoming too narrow to use. • Users can also drag the divider between the panes while working.	20 %
Incoming Call Sound	Users can: • Enable or disable the incoming-call sound. • Test the currently selected sound. • Choose an MP3, WAV, OGG, or M4A file. • Restore the bundled Luna ringtone. When a custom sound is selected, jtel joda copies it into the user's application profile. The original file does not need to remain in its original location.	

Salesforce Settings

Setting	Details	Example Value
Salesforce Home URL	This is the page loaded when jtel joda starts or when the user opens a new Salesforce tab.	https://your-org.lightning.force.com/lightning
Record URL Template	This template is used when jtel supplies a Salesforce record ID. It must contain {recordId}. At runtime, jtel joda replaces {recordId} with the record received from the jtel system.	https://your-org.lightning.force.com/{recordId}
Search URL Template	This template is used when no record ID is available and jtel joda must search Salesforce using a telephone number or another search term. {searchState} is recommended because jtel joda generates the encoded Salesforce Lightning search navigation state automatically. {searchTerm} can be used only when the Salesforce organization has a working direct search route that accepts the encoded term in the URL.	https://your-org.lightning.force.com/one/one.app#{searchState}

Salesforce URL Tester

The URL Tester validates the values currently displayed in Settings, including unsaved edits.

Available test types:

- Telephone number.
- Search term.
- Salesforce record ID.
- Direct Salesforce URL.

Recommended test procedure:

1. Select a test type.
2. Enter a known value.
3. Review the generated URL.

4. Select **Open Test Tab**.
5. Confirm that Salesforce displays the expected record or search result.
6. Adjust the template and repeat if necessary.
7. Select **Save and Reload** after successful testing.

Per-User Configuration

Configuration and session data belong to the current Windows user. This has several practical consequences:

- Each user can choose a different pane width and incoming-call sound.
- Each user signs in with their own Salesforce and jtel accounts.
- Installing or configuring jtel joda for one Windows account does not configure every account on the computer.
- Shared workstation users should sign in to separate Windows profiles where possible.
- Administrators deploying standard URLs should still verify the runtime configuration for each user profile.

The runtime file is normally located at: **%APPDATA%\jtel-jodalapp-config.json**

Use **Help > Open Settings Folder** to open the exact active location. Editing the file manually is normally unnecessary because all supported settings are available in the application.

Daily Use

Starting Work

1. Start jtel joda.
2. Confirm that Salesforce is visible on the left.
3. Confirm that the jtel Portal mini client is visible on the right.
4. Sign in where requested.
5. Select the required jtel agent status or group using the normal jtel controls.

Receiving a Call With a Salesforce Record

1. The incoming call appears in the jtel pane.
2. jtel joda detects the Salesforce record URL supplied by jtel.
3. A new Salesforce tab opens for the call.
4. A rich incoming-call popup appears with details copied from the jtel call display.
5. The configured ringtone plays while the popup is visible.
6. Select the popup to restore and focus jtel joda if it is minimized or behind another application.

Note: currently every call creates a new Salesforce tab, even when the same customer calls again or a tab with the same original URL already exists.

Receiving a Call With Only a Telephone Number

1. jtel joda passes the telephone number to the configured Search URL Template.
2. A new Salesforce tab opens with the search results.
3. The user selects the correct Lead, Contact, Account, or other matching record.

If this workflow opens the wrong Salesforce page, an administrator should test and correct the Search URL Template.

Making an Outbound Call From Salesforce

1. Open the required Salesforce record.
2. Select a telephone-number link in Salesforce.
3. jtel joda captures the `tel:` link and available record metadata.
4. The number, record ID, record name, and object type are passed to the jtel click-to-dial function.
5. The jtel mini client starts the outbound-call workflow.

Working With Salesforce Tabs

- Select a tab to bring it to the front.
- Select `+` to open the configured Salesforce home page.
- Select the `x` on a tab to close it.
- Right-click a tab to close it, copy its URL, or copy its detected Salesforce record ID.
- Use **Ctrl+Tab** and **Ctrl+Shift+Tab** to move between tabs quickly.

Salesforce Setup pages and other Salesforce links that request a new window are opened as jtel joda tabs where possible.

Refreshing and Zooming

Keyboard refresh and zoom commands apply to the browser pane that currently has focus.

For an explicit target, use the **View** menu. Refresh, force refresh, zoom, and developer tools can target:

- The active Salesforce tab.
- The Call Center pane.
- Both panels.

Important Keyboard Shortcuts

Shortcut	Action
Ctrl+T	Open a new Salesforce tab
Ctrl+W	Close the active Salesforce tab or active jtel child window
Ctrl+Tab	Select the next Salesforce tab
Ctrl+Shift+Tab	Select the previous Salesforce tab
Ctrl+PageDown / Ctrl+PageUp	Select the next / previous Salesforce tab
Ctrl+1 through Ctrl+8	Select a numbered Salesforce tab
Ctrl+9	Select the last Salesforce tab
F5 / Ctrl+R	Refresh the focused browser pane
Ctrl+F5 / Ctrl+Shift+R	Force-refresh the focused browser pane
Ctrl++ / Ctrl+-	Zoom the focused browser pane in / out
Ctrl+0	Reset zoom for the focused browser pane

Alt+Left / Alt+Right	Navigate back / forward in the focused pane
Ctrl+,	Open Settings
F11	Toggle full-screen mode
F12	Toggle developer tools for the focused pane

Debug Log

Open the application menu and use the Help section to:

- Show or hide the Debug Log.
- Copy the complete Debug Log.
- Clear the Debug Log.
- Open the Settings folder.

The log records incoming-call detection, Salesforce tab creation, click-to-dial metadata, jtel handoff results, navigation, and loading errors.

Troubleshooting

Settings Opens Every Time

One or more URLs are missing or still use placeholder values. Complete both Settings tabs and select **Save and Reload**.

The jtel Pane Is Blank or Unavailable

Check the jtel System URL, network/VPN connectivity, DNS, and whether the URL opens in an approved browser on the same computer.

Salesforce Opens the Wrong Page for a Telephone Number

Use the Salesforce URL Tester with a known number. The Search URL Template should normally use **{searchState}** for Salesforce Lightning.

An Incoming Call Does Not Open a Salesforce Tab

Confirm that the jtel mini client is displaying the call and supplying a Salesforce URL through M:CRMLinkAcidGroup. Copy the Debug Log immediately after the test.

Click To Dial Does Not Start a Call

Confirm that the Salesforce number is a clickable `tel:` link and that the jtel client is loaded and signed in. The Debug Log should show both the dial request and the jtel handoff result.

The User Is Asked to Sign In Again

Session cookies are persistent, but Salesforce or jtel can require a new login after logout, cookie expiry, multi-factor authentication, or a security-policy change. jtel joda does not store or autofill passwords.

The Incoming-Call Sound Does Not Play

Open General Settings, confirm that sound is enabled, and select **Test**. Restore Luna to check whether a custom file is unavailable or unsupported.