

Lightning

This guide explains how to activate the jtel ACD using the Lightning Salesforce experience.

Prerequisites

The following steps should be performed first:

[First Steps](#)

[Call Center Adapter Installation](#)

Tip



You may wish to activate the MiniClient instead of the MicroClient in Salesforce Lightning. To do this, change the CTI Adapter URL to:

```
https://jtel-server/CarrierPortal/mclogin/reseller-uid/client-uid
```

Create a new Lightning App

Note - you can also customise an existing lightning app.

Using Setup in Salesforce, under Apps ... App Manager, create a new lightning app:

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ

jtel ACD

* Developer Name ⓘ

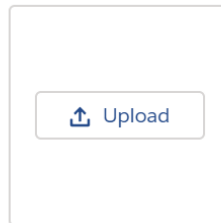
jtel_ACD

Description ⓘ

jtel ACD Integration

App Branding

Image ⓘ



Primary Color Hex Value ⓘ



#0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview



In the next page, select Console Navigation:

New Lightning App

App Options

Navigation ⓘ

* Navigation Style

- ☐ Standard navigation
- ☒ Console navigation

Setup and Personalization ⓘ

Setup Experience

- ☒ Setup (full set of Setup options)
- ☐ Service Setup

App Personalization Settings

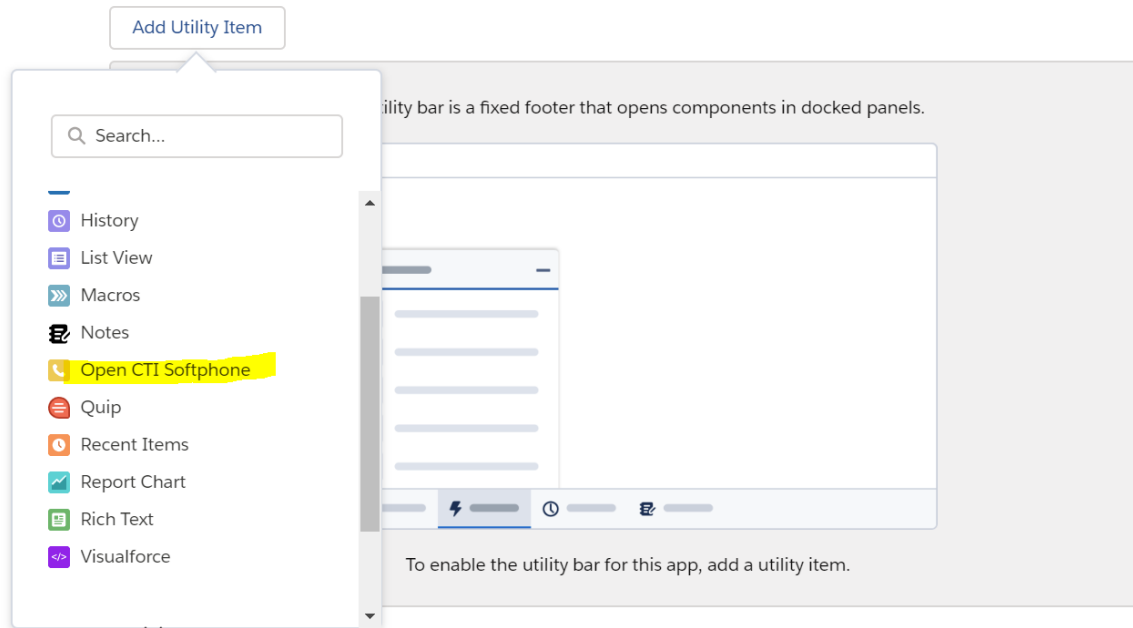
- ☐ Disable end user personalization of nav items in this app

Add the Open CTI Softphone to the list of utility items:

New Lightning App

Utility Items

Give your users quick access to productivity tools and add background utility items to your app.




Customise the utility item as required:

New Lightning App

Utility Items

Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item


 jtel ACD

PROPERTIES


Open CTI Softphone


↑ ↓ Remove


▼ Utility Item Properties

* Label 


jtel ACD

Icon 


 call X

Panel Width 

300

Panel Height 

800

☒ Start automatically 

In the next two screens, add and customise any further navigation items required.

In the final screen, select which User Profiles will be given access to this app.

Popup Options

Lightning allows you to define how and where popups should occur. Search for Softphone Layouts in the settings, and check to see what is configured.

SETUP Softphone Layouts

Softphone Layout Edit [Help for this Page](#)

Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layouts to user profiles by clicking Layout Assignment in the Softphone Layouts page.

Name: **Standard Softphone Layout** ☒ Is Default Layout [Save](#) [Cancel](#)

Select Call Type: **Inbound**

Softphone Layout [Help about this section](#)

Display these call-related fields:

- ▶ Caller ID, Dialed Number [Edit](#)

Display these salesforce.com objects:

- ▶ Contact, Account, Lead, Case [Add / Remove Objects](#)

Display rules:

- ▶ If single Contact found, display: Name, Title
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed. [Edit](#)
- ▶ If single Account found, display: Account Name, Type, Account Number
If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed. [Edit](#)
- ▶ If single Lead found, display: Name, Company, Title, Lead Source
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed. [Edit](#)
- ▶ If single Case found, display: Case Number, Status, Priority
If multiple matches are found, only the Case Number is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed. [Edit](#)

Screen Pop Settings [Help about this section](#)

Screen pops open within: New browser window or tab

- ☐ Existing browser window
- ☒ New browser window or tab [Collapse](#)

Display rules for screen pops:

- ▶ No matching records: Don't pop any screen [Edit](#)
- ▶ Single-matching record: Pop detail page [Edit](#)
- ▶ Multiple-matching records: Pop to search page [Edit](#)

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Note: it has been observed that if "Existing browser window" is selected, that no popup will occur, even though the call to salesforce is received correctly by the Salesforce system.

Troubleshooting

Sometimes, you might not see a salesforce popup on the screen, or that the telephone symbol is crossed out.

This means that the integration is not working.

Lightning or Classic

If you are having problems with Lightning, try switching the integration over to Lightning only:

jtel System Salesforce Adapter

[All Call Centers](#) » jtel System Salesforce Adapter

Call Center Detail

[Edit](#) [Delete](#) [Clone](#)

General Information

InternalName	jtelSystemAdapter
Display Name	jtel System Salesforce Adapter
CTI Adapter URL	https://test10.jtel.de/CarrierPortal/mclogin/jtel/jtel
Use CTI API	true
Softphone Height	950
Softphone Width	400
Salesforce Compatibility Mode	Lightning

Dialing Options

Outside Prefix
Long Distance Prefix
International Prefix

Call Center Users

[Manage Call Center Users](#)

Call Center Users by Profile

Standard Platform User	1
System Administrator	2
Total	3

JavaScript Debugging

To see what is actually happening when the screen pop is made, you can switch to the JavaScript debugging console:

```

[icepush.fc436.async- icepush.js.xhtml?ln=_sh&v=3_3_0_150528:1
connection] [Mon, 18 Jan 2021 12:21:11 GMT] Blocking connection
cannot be shared among multiple web-contexts.
Initiating blocking connection for "." web-context...
[icepush.fc436.async- icepush.js.xhtml?ln=_sh&v=3_3_0_150528:1
connection] [Mon, 18 Jan 2021 12:21:11 GMT] connection
monitoring started within window fc436
[icepush.fc436] [Mon, icepush.js.xhtml?ln=_sh&v=3_3_0_150528:1
18 Jan 2021 12:21:11 GMT] bridge loaded!
set postcall timer                               jtListeners.js:39
JTEL: MiniClientMain.xhtml - sforce.opencti      jtUtils.js:279
defined - Salesforce LIGHTNING
JTEL: sforce.opencti.getAppViewInfo( { callback: jtUtils.js:281
jtelSalesForce_OnAppViewInfoListener } );
JTEL: sforce.opencti.onClickToDial(              jtUtils.js:283
jtelSalesForce_OnClickToDialListener_Lightning );
JTEL: sforce.opencti.enableClickToDial(          jtUtils.js:285
jtelSalesForce_ClickToDialCallback_Lightning );
JTEL:                                           jtUtils.js:287
sforce.opencti.notifyInitializationComplete();
JTEL: jtelSalesForce_OnAppViewInfoListener      jtUtils.js:189
success = true
JTEL: jtelSalesForce_OnAppViewInfoListener      jtUtils.js:193
jtelSalesForce_isSandbox = false
JTEL: jtelSalesForce_OnAppViewInfoListener      jtUtils.js:195
jtelSalesForce_pageInfoData = {"url":"https://eu18.lightning.for
ce.com/lightning"}
JTEL:                                           jtUtils.js:212
jtelSalesForce_ClickToDialCallback_Lightning - Click to dial was
enabled.
[icepush.fc436.async- icepush.js.xhtml?ln=_sh&v=3_3_0_150528:1
connection] [Mon, 18 Jan 2021 12:21:13 GMT] initialize
connection within window fc436
►[icepush.fc436] [Mon, icepush.js.xhtml?ln=_sh&v=3_3_0_150528:1
18 Jan 2021 12:21:13 GMT] connection was re-established in
window [fc436]

```

If the integration is correctly initialised, you should see the lines above.