

# 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 ⓘ

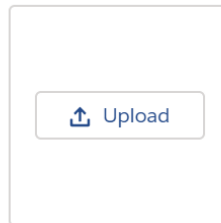
jtel\_ACD

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

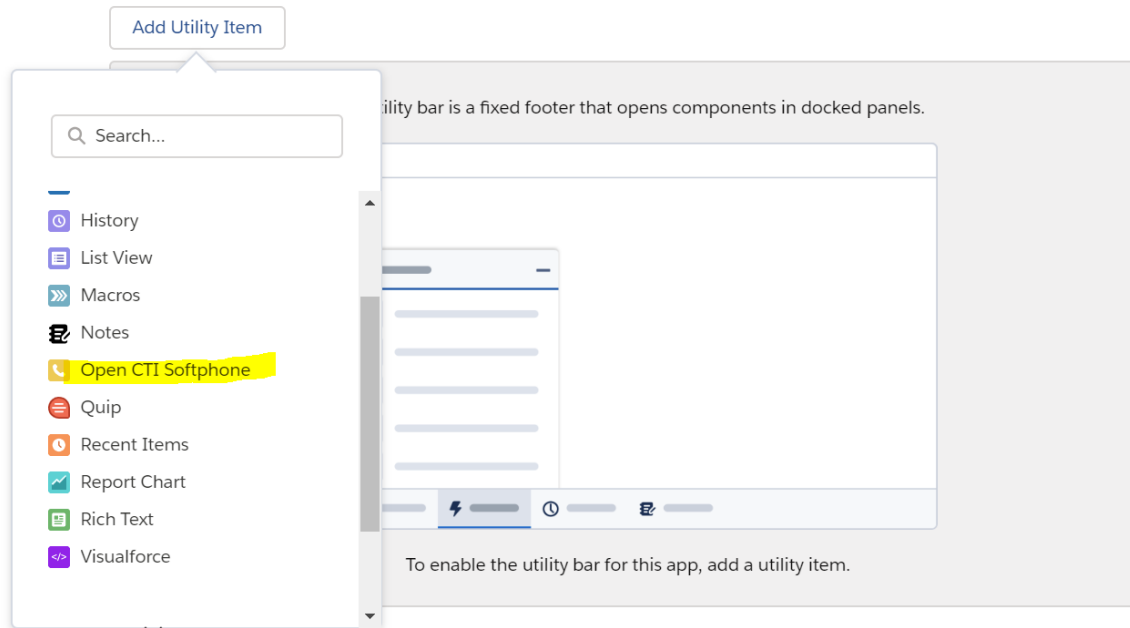
- ☐ Disable end user personalization of nav items in this app

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](#)

▶ 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.