

CTI Data Connector for Salesforce

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CTI Data Connector for Salesforce

by Mirage Computer Systems GmbH

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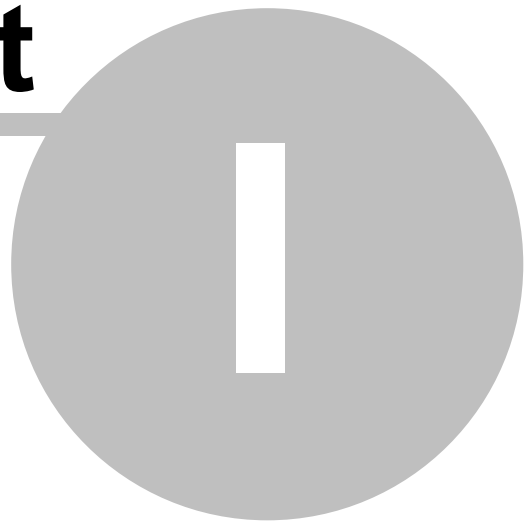
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Part







1 Using this tutorial


This tutorial is an easy way to learn how to use CTI Data Connector for Salesforce. It is designed for all office workers who want to benefit from Computer Telephony integration.

While completing these lessons, you will learn how to make an outgoing call, use the phone book or make the necessary configuration settings for your PBX system.

Part I explains the basics for using CTI Data Connector for Salesforce features, including how to make calls, receive calls or how to make personal configuration settings. Part II provides hands-on experience for using additional features like expert settings or database configuration.

Using the help

Use the buttons    in the upper right corner to browse through the online help. To print one single page, use the button . Small images are enlarged if you click on it.

The Online Tutorial will be updated also after its release. In case you do not have Internet access, you can select the [Offline version](#)  in the Configuration Wizard.

Print this tutorial

The Online Tutorial is also available as a PDF document.

[You can print this tutorial - click on the link to download PDF file](#)

Update

[An Update is available](#) 



recently added

[Service Cloud Console](#)  (1/2012)

[Install Multiple Call Center Adapters](#)  (12/2011)

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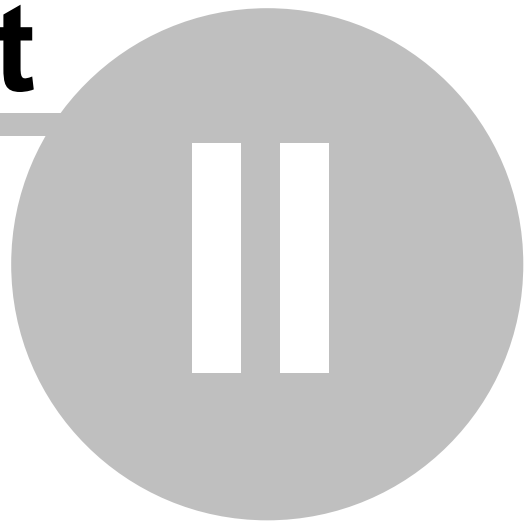
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www.cti-data-connector.com

CTI Data Connector for Salesforce Version: 3.0.5

This document was updated: 13.06.2012

Part



2 Software Update

You will find up-to-date information around CTI Data Connector for Salesforce at www.cti-data-connector.com , or just choose Menu ?, **Software Service**.

Check regularly for release updates of CTI Data Connector for Salesforce.

You will find your current version number in the menu ?, **About CTI Data Connector for Salesforce**. The latest main release number is **3.0.5** .

[Service Pack 3.0.5](#)^[12]

2.1 Service Pack 3.0.5

Modification history version 3.0.4 and 3.0.5

☐ For a complete list of all modifications click here

Call Center Adapter / SoftPhone

- New The CTI adapter now works with the salesforce [Service Cloud](#)^[47]
- New The [subject line](#)^[92] of the activity is configurable. Instead of the salesforce default value Call 12/06/2011 e.g. configure **Incoming call 11:38** (or add date and time)
- New If a call was **not successful** (e.g. the line is busy) you can [configure](#)^[92] if this call should be documented in the activity history or not
- New Configure, if you want to **autosave outgoing or incoming** calls. In previous versions, every call was saved
- New Users of the Salesforce Professional Edition do **not need to buy the API**
- Changed **Advanced Caller identification** - e.g. it does not matter if the phone number is stored as +49(0)7525-529339, 00497525529.339 or 07525/529339 - the phone numbers are rebuild depending on **country specific rules**
- Changed Enable/Disable [internal numbers](#)^[77] for caller identification
- Fixed Supports caller identification for **multiple calls at the same time**
- Fixed With some PBX systems evens have been handled wrong - the SoftPhone either did not show an event or was never terminated

Configuration wizard

- Changed The TAPI driver is now displayed with the same name like in the control panel

Fixed

Some TAPI drivers have been displayed with an empty line instead with the name of the driver

Update Eligibility

The service pack requires a valid version of CTI Data Connector for Salesforce release 3.0 to install. Otherwise it will install as a trial version.

When should you install the update?

- If a version 3.0 to 3.0.3 is installed, the update is essential and should be installed
- If version 3.0.4 is installed, the update is only required if
 - Salesforce Professional Edition is used and the API is not required for other applications
 - there is a problem with the events in the SoftPhone

To check which version is installed, open the Call Center Adapter (*Setup > AppSetup > Customize > Call Center > Call Centers*) and check the field: **Config Version**

CTI Data Connector - Call Center Adapter Version 3

[All Call Centers](#) » CTI Data Connector - Call Center Adapter Version 3

Call Center Detail

Edit

Delete

Clone

General Information

Internal Name	CDCSFE
Display Name	CTI Data Connector - Call Center Adapter Version 3
Description	Integration in salesforce call center adapter for CTI Data Connector
CTI Connector ProgId	CDCSFEAdapter.CDCSFEAdapter.2
Version	3.0
Config Version	3.0.4

Dialing Options

Outside Prefix	0
Long Distance Prefix	0
International Prefix	00
Country Code	49

Installed Version of the call center adapter

Installation of the Update

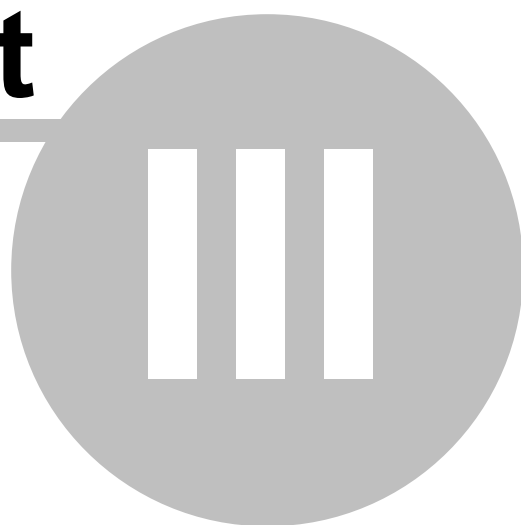
The update requires a **full new installation**. An uninstall of the older version is not necessary. The [Call Center Adapter](#)^[89] has to be **imported and configured** again.

- [Click here to download the update](#)
- [Single User Installation](#)^[88]
- [Network Installation](#)^[100]

Important update note for version 3.0 to 3.0.3

In case you are using version 3.0 to 3.0.3, the update will install on a new program folder. **After the installation, copy the license file cdcse.lic from the old folder** (default is c:\program files\CTI Data Connector - salesforce.com Edition 3.0) **to the new installation folder** (default is c:\program files\CTI Data Connector for salesforce 3.0). The old folder can be deleted.

Part



3 Part I - learning the basics

3.1 About Part I

CTI Data Connector for Salesforce is an application which responds to **incoming** and **outgoing** calls in background mode. The only precondition for your PC / telephone system is a [TAPI interface](#)^[14]. CTI Data Connector for Salesforce supports both a First Party solution (a phone is connected via serial interface or USB to the PC) and a Third Party solution (CTI Server).

CTI Data Connector for Salesforce can be configured individually for every PC and is available with different options. Therefore you may not be able to use specific functions although they are described here.

Before you start using CTI Data Connector for Salesforce you have to set the configurations for the telephone system and the database(s). Normally, this is done during the installation. It is essential to make some basic configuration settings which are described in the chapter [Minimum Configuration](#)^[21].

Part

IV

4 Introduction

4.1 Start the Application

CTI Data Connector for Salesforce is either started automatically with the operating system or you start it within the program manager group **CTI Data Connector for Salesforce** . After starting the program you will find an icon in the system tray (notification area, down to the right near the date and time display).



CTI Data Connector for Salesforce is ready and will respond to incoming and outgoing calls. The icon in the taskbar will respond to clicks made with the **left** and **right mouse button**. For details see chapter [taskbar - Control Basic Functions](#)^[22].

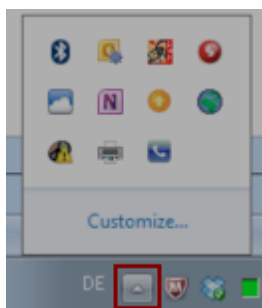


You have to type in you salesforce login name and salesforce data before you can use CTI Data Connector for Salesforce. If you get an error you probably have to install the salesforce Desktop Integration, *Connect for Office* - see details chapter Install Connect for Office.

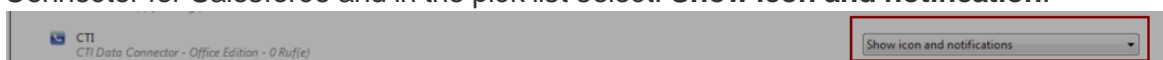
By default, the icon is not visible on Vista and Windows 7 in the notification area. To show



the icon for CTI Data Connector for Salesforce in the system tray, click on the up arrow. Click on **Customize**.



This will open the Notification Area Icons control panel item. Select the icon for CTI Data Connector for Salesforce and in the pick list select: **Show icon and notification**.



Additionally add the red salesforce icon

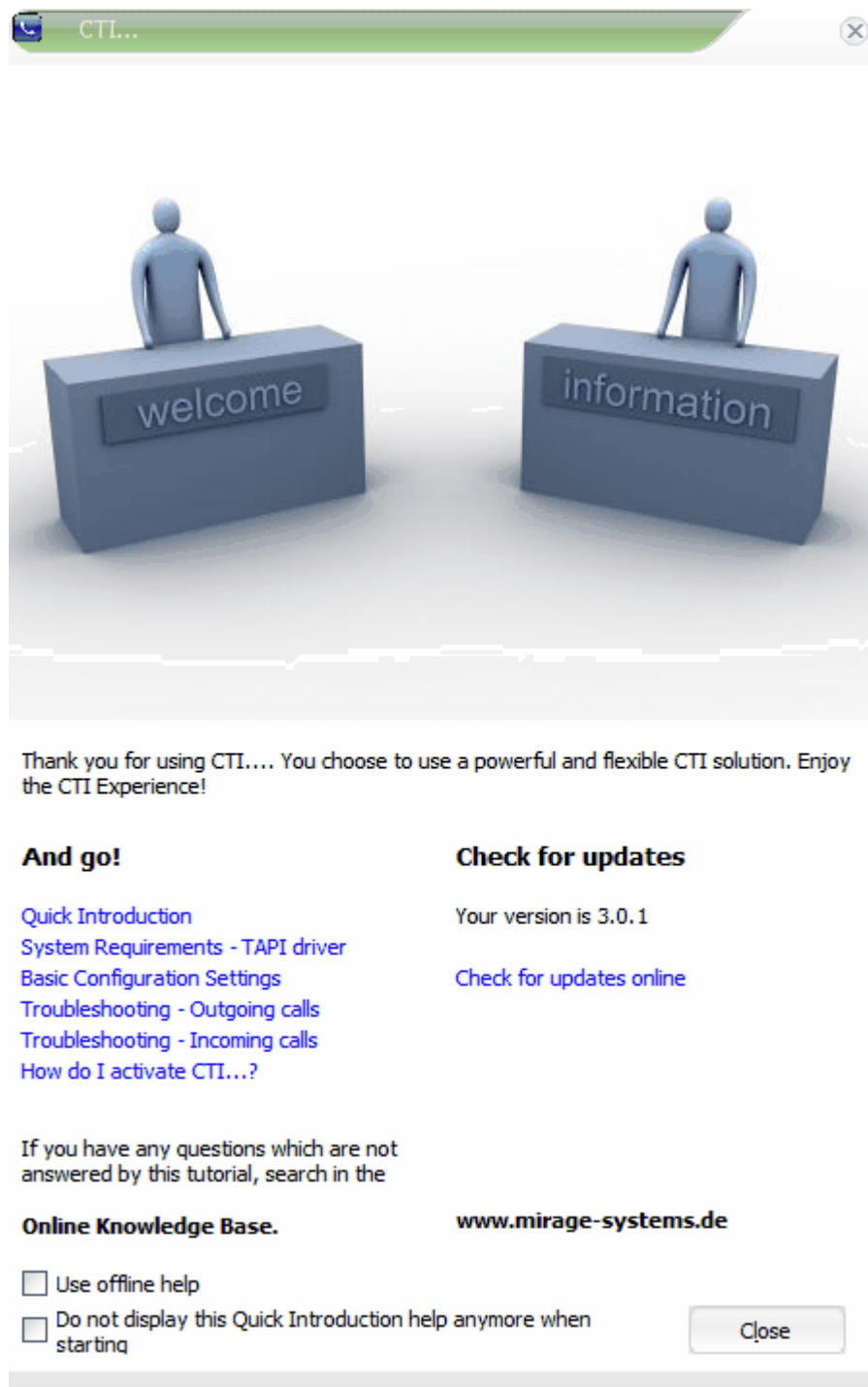


4.2 Welcome Screen

By default, the Welcome Screen is opened after each program start. This screen provides you with:

- Links to most popular FAQ to get started
- Link to Online Knowledge Base
- Link to updates

The screen can be deactivated by checking *Do not display this Quick Introduction help anymore when starting* and activated again in the Configuration Wizard, [Display Quick Introduction Help](#)^[66].



If you don't have an Internet connection, select *offline help*. You also can change this setting in the configuration wizard, expert settings, screen [Help and Welcome](#)⁶⁵.



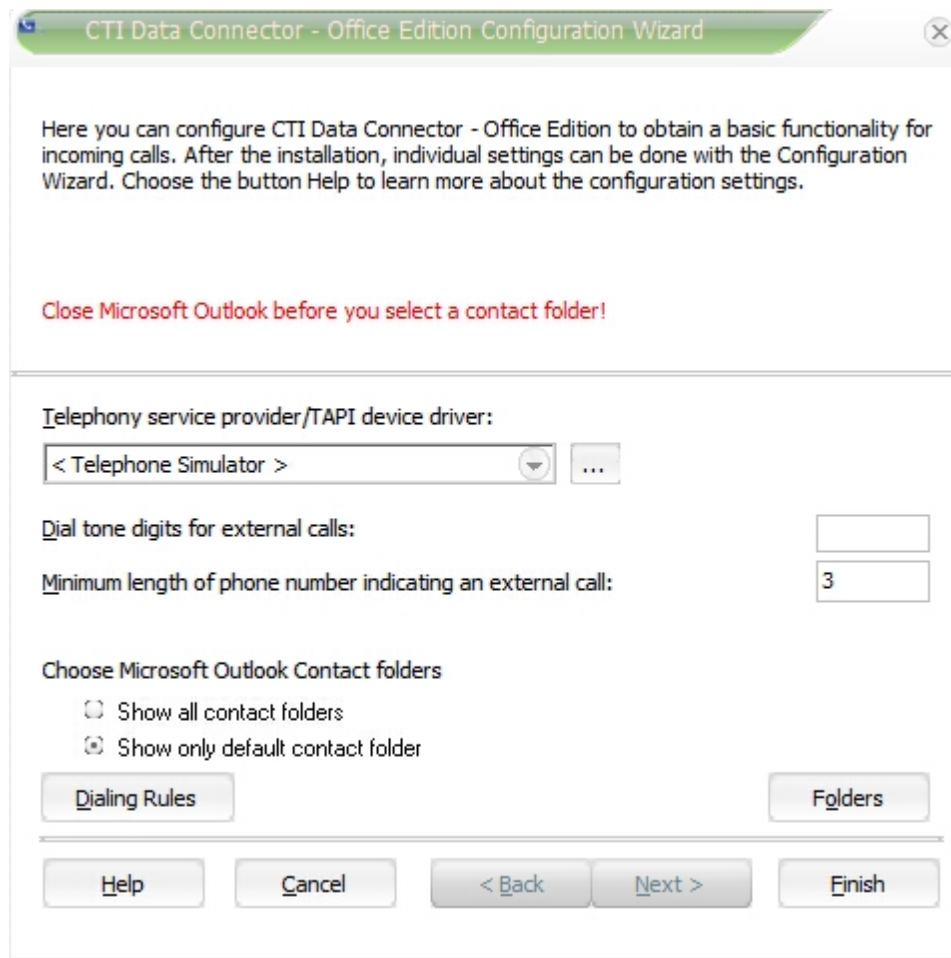
Depending on the program version, some options could be not available.

4.3 Minimum Configuration Settings

During installation, the [Configuration Wizard](#)^[53] was already started. You can define a lot of individual configuration settings there. The following settings **have to be defined** to guarantee a basic functionality.

- [TAPI device driver](#)^[56] - it is delivered by the telephone manufacturer. See also: [System requirements - TAPI driver](#)^[141]
- Prefix for [external calls](#)^[71] and the [minimum length](#)^[72] of a phone number indicating an external call
- Button [Dialing Rules](#)^[72] - configures country settings and area code. See also special [configuration for US / Canada](#)^[73]
- The option: *Show all contact folders* allows to use the public and private contact folders for caller identification. The option: *Show only default contact folder* displays only private contact folders.
- Button Folder - Select Microsoft Outlook™ contact folder for caller identification. You have to close Outlook before you can select the contact folders.

Just by setting this minimum configuration you will be able to make outgoing calls and to identify incoming calls. The Configuration Wizard can be started any time by **right** click on the [icon](#)^[22], option [Configuration Wizard](#)^[53].



See also

[Where do I find the TAPI driver?](#)¹⁴²
[System requirements - TAPI driver](#)¹⁴¹

4.4 Taskbar - Control Basic Functions

After the program start, the taskbar (notification area, down to the right near the date and time) will display the icon



CTI Data Connector for Salesforce is ready and will respond to incoming and outgoing calls.



You can control basic functions via the icon

- with a **single** click on the **right mouse button** you select options such as redialing or service programs
- with a **single** click on the **left mouse button** you operate phone functions (pick up call, hold, [transfer](#)^[45], hang up)

During the signaling of a call by the Desktop Notification the control via the taskbar icon will not be available.

Hovering above icon with the mouse pointer

If you hover above the icon with the mouse pointer, the message CTI Data Connector for Salesforce - 0 call(s) will appear. The amount of incoming and outgoing calls during the last restart will be displayed.

The options in detail:

- [Blue Icon - Left Mouse Click](#)^[23]
- [Blue Icon - Right Mouse Click](#)^[24]

4.4.1 Blue Icon - Left Mouse Click



Single left mouse click on the blue icon

This function will be only available **during an active call** and is designed for phoning with a headset. The individual options will be displayed depending on the status of the call.

- **When ringing:** Answer, reject or [transfer](#)^[45] call
- **When the call is active:** Hold, [transfer](#)^[45] or disconnect call. If the call is on hold, you will have these options: Answer or Disconnect

4.4.2 Blue Icon - Right Mouse Click



Single right mouse click on the blue icon

Here you can choose from different options. Depending on the configuration it is possible that not all options will be available:

- Open CTI Data Connector for Salesforce - Starts the [control centre](#)^[24]
-

- Redialing - redials the phone number used last
 - [Dial from Clipboard](#)^[38] - searches in the clipboard (CTRL+C) for a phone number and dials
 - Quick Dialing - opens the dialog for quick dialing
-

Configuration Wizard - starts the [Configuration Wizard](#)^[53]

- Error protocol - displays the [error log](#)^[84]
 - [Show License Information](#)^[80] - displays the license information
 - Help - opens this tutorial - the type of the help system ([Online / Offline](#)^[65]) can be set in the configuration wizard
-

- Quit - Terminates CTI Data Connector for Salesforce

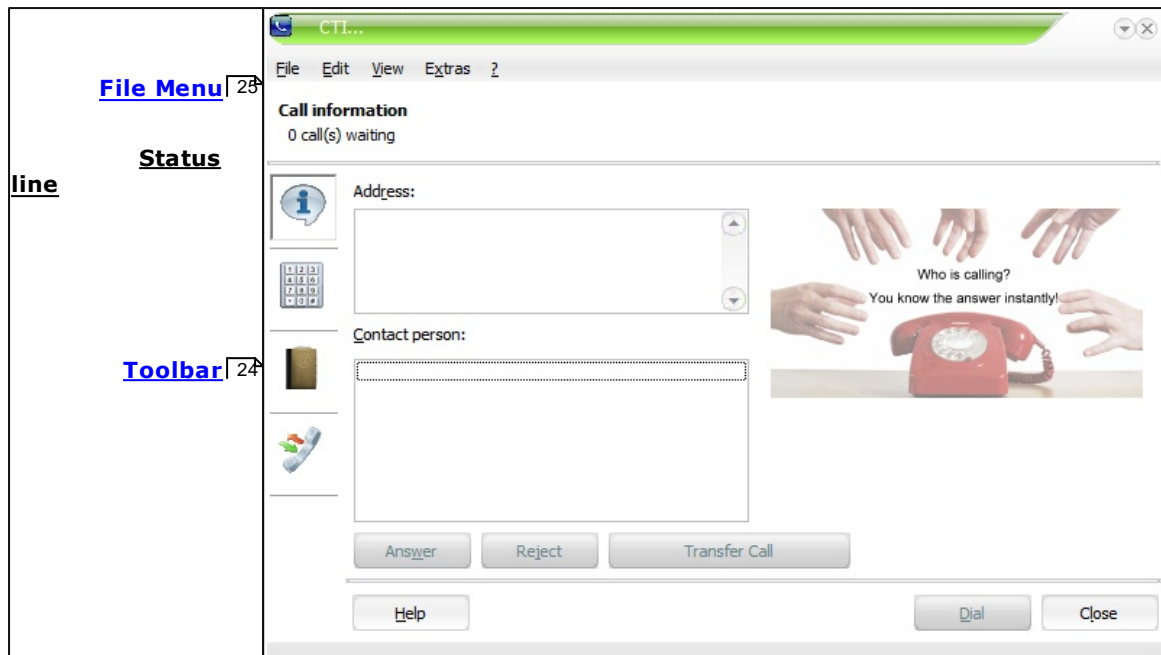
4.5 First Steps

After [starting](#)^[18] CTI Data Connector for Salesforce you can access all functions via the [icon in the taskbar](#)^[22].

To practice, try to make an outgoing call using the [Hotkey](#)^[34], which should work with all applications.

4.6 Navigation within the Control Centre

Nearly all functions can be accessed via the file menu, the [toolbar](#)^[24] or by clicking on the right mouse button above the icon in the taskbar.



Overview over the File Menu

File
<ul style="list-style-type: none"> • Close: Closes the program window, but does not terminate the application • • Quit: Terminates CTI Data Connector for Salesforce
Edit
<ul style="list-style-type: none"> • Cut: Deletes the selected text and copies it to the clipboard • Copy: Copies the selected text to the clipboard • Paste: Pastes the contents of the clipboard into the selected field • Delete: Deletes the selected text • Quick Dialing: Displays a submenu of the quick dialing list (only available within quick dialing) • List: Displays a submenu within the call history list (only available within this list) • Search: Displays the phone book for searching for an address
View
<ul style="list-style-type: none"> • Call information: displays call information • Phone and Quick dialing: Displays the phone and the quick dialing list for outgoing

calls

- **Phone book:** Displays the phone book for searching for an address
- **Call History** (outgoing / incoming calls): Displays the call history

Extras

- **Format phone numbers:** Activates the function for [formatting the phone numbers](#) ^[82]
- **Configuration Wizard:** Starts the [Configuration Wizard](#) ^[53]
- **Error protocol:** Displays a [log](#) ^[84] of the last system messages
- **Always on top:** Defines whether the control centre of CTI Data Connector for Salesforce will always in the foreground when a call is coming in (the window will cover any other applications and you cannot switch to them) or whether the control centre will pop up and you can switch to other applications
- **Compact salesforce database:** Compact the salesforce database for caller identification. This is normally done automatically

?

- **Help:** Displays **context-sensitive** help information (help for the currently displayed screen)
- **Contents:** Displays this tutorial
- **CTI Data Connector for Salesforce on the Web:** Displays the internet page of CTI Data Connector for Salesforce
- **Software Service:** Checks for new [Updates](#) ^[12]
- **%OEMNAME%> on the Web:** Displays the website of Mirage Computer Systems GmbH
- **About CTI Data Connector for Salesforce:** Displays version information about the installed application
- **Show License Information:** Displays the [purchased licenses](#) ^[80] and allows to type in Activation Keys for adding new licenses

The following options are only available after the product was activated (full version)

- **Backup License** - make an online backup of the license file
- **Restore License** - restore the online backup of the license file
- **Deactivate License** - transfer the license to another PC

4.7 Phone Simulator

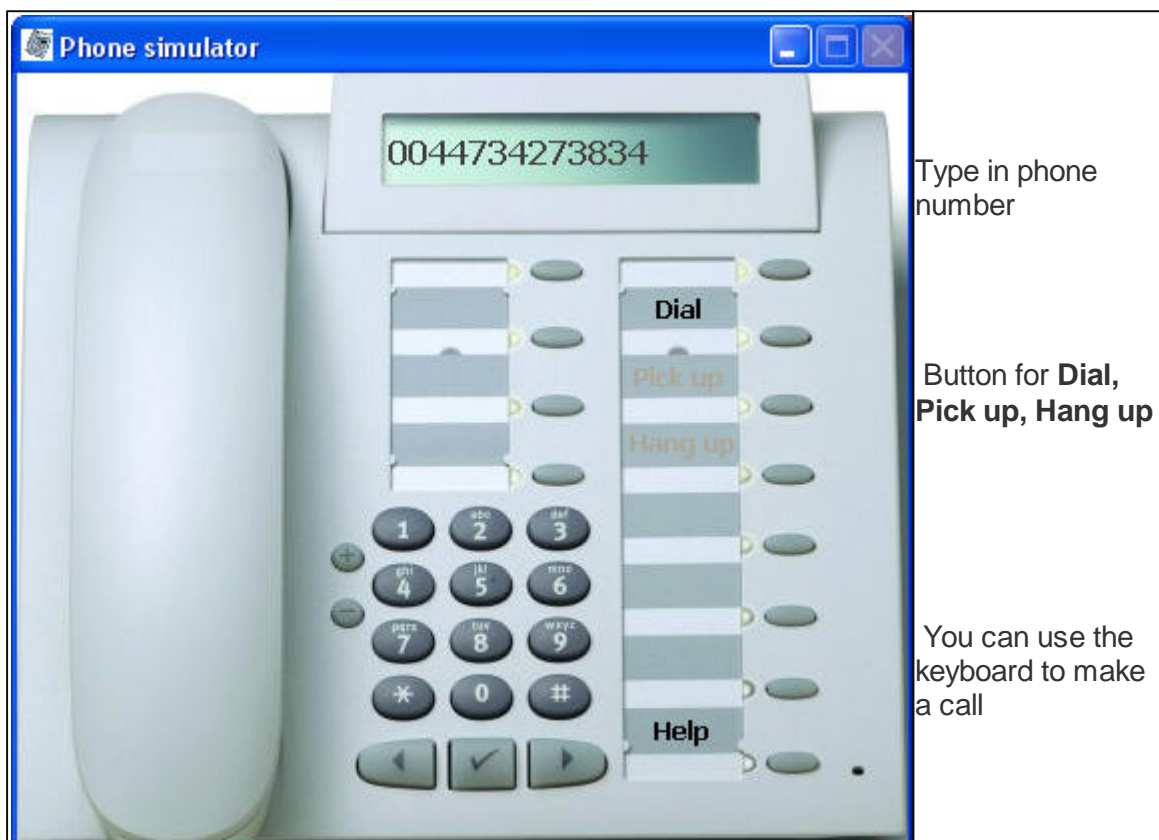
If you have no TAPI-enabled phone available and you want to test CTI Data Connector for Salesforce, you can use the simulator which works like a regular telephone.

Activating the Simulator

Start the [Configuration Wizard](#)^[53] and choose the page where you can select your [telephony service provider](#)^[55]. Choose **<Telephone Simulator>**. When you start CTI Data Connector for Salesforce, the simulator will be started automatically.

Working with the Simulator

The telephone simulator acts like a normal telephone with which you can make outgoing calls and accept incoming calls.



Type in phone number

Button for **Dial**,
Pick up, **Hang up**

You can use the keyboard to make a call

Simulating an incoming call

- Type in a phone number (without country code and special characters) in the display. You can alternatively use the keyboard to type in the number.
- Press the button **Dial**
- CTI Data Connector for Salesforce performs the caller identification and signals the incoming call
- Accept the incoming call by pressing the button **Pick up**

- You can disconnect the call by pressing the button **Hang up**

Simulating an outgoing call

- Search in the phone book of CTI Data Connector for Salesforce for an address or a contact person and dial by double-clicking on the phone number. You can dial alternatively by [highlighting a phone number](#)^[34] and pressing the configured [Hotkey](#)^[58].
- CTI Data Connector for Salesforce displays the dialled address
- Establish the call by pressing the button **Pick up**
- You can disconnect the call by pressing the button **Hang up**

Part



V

5 Make Phone Calls

5.1 Outgoing Calls

CTI Data Connector for Salesforce provides multiple options to make an outgoing call dependent on the application your are using. The option [Dial with an Hotkey](#)^[34] should work in any application.

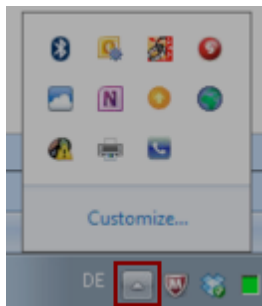
All available options are:

- Dial within [Salesforce](#)^[32]
- Dial using a [Hotkey](#)^[34]
- Dial within the [Browser](#)^[35]
- Dial with a [Hyperlink](#)^[36]
- Dial using the [Clipboard](#)^[38]
- [Redial](#)^[38] using the last called phone number
- Dial using the [telephone set](#)^[38] - the dialled address will be displayed

By default, the icon is not visible on Vista and Windows 7 in the notification area. To show



the icon for CTI Data Connector for Salesforce in the system tray, click on the up arrow. Click on **Customize**.



This will open the Notification Area Icons control panel item. Select the icon for CTI Data Connector for Salesforce and in the pick list select: **Show icon and notification**.



Additionally add the red salesforce icon



5.1.1 Format of a Telephone Number

CTI Data Connector does not care whether phone numbers are stored unstructured or include special characters. It is only important that the numbers comply with the international phone number format. Telephone numbers can be stored as follows:

- 02089481345
- +44(0)2089481345
- 0044(0)2089481345
- 004402089481345 - this is not a valid phone number but would be formatted correctly
- 636.477.8702
- +1636.477.8702

After the country code the number 0 should be surrounded by brackets or be omitted. If the number 0 is not surrounded by brackets, then CTI Data Connector for Salesforce uses the dialing settings stored in windows to either truncate the 0 or leave the 0 (e.g. for Italy).

Example

- 004402089481345 would result in 00442089481345
- 003902089481345 would result in 003902089481345

5.1.2 Necessary configuration settings for outgoing calls

Below find a list of configuration settings which have an impact on outgoing calls. If outgoing calls are not working, check these settings and also check [Troubleshooting - Outgoing calls](#)^[174].

Configuration Settings

- Select correct [TAPI driver](#)^[56]
- [PBX Configuration](#)^[71] - especially dial tone digits for external calls
- [Dialing Rules](#)^[72] - for US / Canada check [additional settings](#)^[73]
- TAPI Configuration - [Prefix Outgoing Calls](#)^[62]
- TAPI Configuration - [Provider Postfix](#)^[63]
- TAPI Configuration - [Ignore Fake Number](#)^[63]
- [Dial via Hotkey](#)^[34] - [configure](#)^[58] Hotkey and [activate this option](#)^[55]
- [Dial within Browser](#)^[35] - [activate this option](#)^[55]

- [Dial with a Hyperlink](#)^[187] - [activate this option](#)^[55]

If **internal** numbers are not dialled correct, check:

- TAPI Configuration - [Prefix internal number](#)^[63]
- [Minimum length](#)^[72] of phone number indicating an external call


5.1.3 Dial within Salesforce

There are different options to make an outgoing call (requires the installation of the salesforce [call center adapter](#))^[89]

Making a Call Using Click-to-Dial

All phone numbers will have a green phone icon .

To make a call directly from the phone field of a contact, lead, activity, or account

- Locate the number that you want to dial in a contact, lead, activity, or account.
- Click the  button to the right of the number. The number is automatically dialed in the first open SoftPhone line.

Note

- A number that has already been clicked cannot be clicked again for five seconds.
- The button does not appear next to fax numbers.

Use the SoftPhone to dial


You can type in a phone number in the SoftPhone

- In the SoftPhone, click the name of the open line that you want to use. This action opens the dial pad for that line.
- Enter the phone number that you want to dial by clicking the number buttons on the dial pad, or by typing numbers on your keyboard.
- Click **Dial** or press the Enter key on your keyboard.



Making a Call Using the Call Center Directory

To make a call using the call center directory:

- In the SoftPhone, click the name of the open line that you want to use. This action opens the dial pad for that line.
- Click  next to the dial pad to open your call center directory.
- Use the directory to locate the number that you want to dial.
- When you have found the number, click the name associated with the number to automatically enter the number into the dial pad.
- Click **Dial** or press the Enter key on your keyboard.



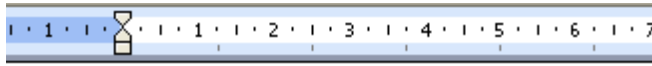
For more information about the salesforce *call center adapter* search in the salesforce online help using the search term: **call center adapter overview**

5.1.4 Dial with a Hotkey

In nearly any application a phone number can be **highlighted** and dialed using the Hotkey defined in the [configuration settings](#)⁵⁸. **The default value is the key F10.**

Highlight the phone number within the Web Browser by pressing down the left mouse key and dragging the mouse cursor to the right. When reaching the end of the phone number, release the left mouse button and press F10.

In the example below a phone number has been highlighted. It can be dialed using the defined Hotkey.



United Whiskey Destilleries Ltd.
Freemont Tower
3 Perkins Bridge
Windsor
SL44QQ
United Kingdom

Phone: ++44734273833

See also

[Troubleshooting - Hotkey is not working](#) ¹⁷⁸

Configuration - [Hotkey to dial with a highlighted phone number](#) ⁵⁸

Configuration - [Activate dialing via Hotkey](#) ⁵⁵

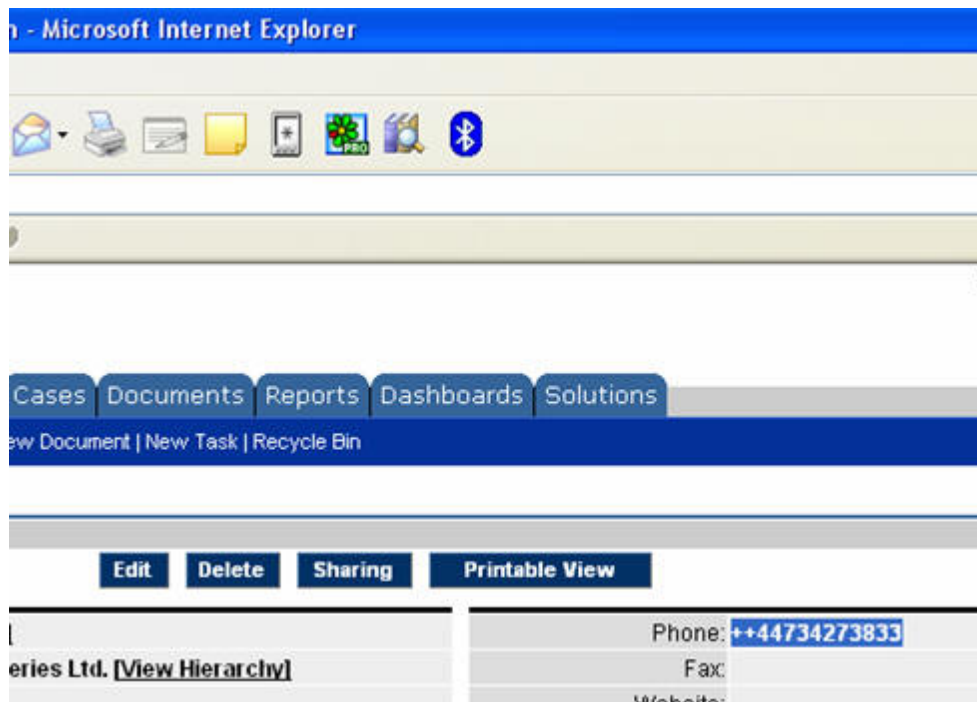
5.1.5 Dial within the Browser

Within an Browser any phone number can be **highlighted** and dialled with 2 different options.

Highlight the phone number within the Web Browser by pressing down the left mouse key and dragging the mouse cursor to the right. When reaching the end of the phone number, release the left mouse button. You can dial:

- Using the **right mouse button**. The option **Dial with CTI Data Connector for Salesforce** will be displayed
- Using a [Hotkey](#) ³⁴

In the example below a phone number has been highlighted within a browser application. It can be dialled using the Hotkey or right mouse click, **Dial with CTI Data Connector for Salesforce**. You have to activate *Dialing within Browser* and *Dialing via Hotkey* within the [configuration settings](#) ⁵⁵.



Dialing with right mouse button is available only in the **Internet Explorer**

See also

[Enable dialing within Browser](#) ^[59]

5.1.6 Dial with a Hyperlink

It is possible to instantly use the option [Dial with a Hotkey](#) ^[34] to dial. An optimum integration can be achieved by using a link to dial within the Lead, Contact or Account page.

Advantage

- It is just one click instead highlight a phone number and press a key

- You can dial from any list view or report

Disadvantage

- You need to implement a field in salesforce.com for each phone number

To implement the function you have to create a new custom formula text field. This is explained for contacts.

1. Within Salesforce, select Setup, Customize, Contacts, Fields
2. Create a new **custom formula field** of the type **Text**
3. Name it "**Call Main Phone**"
4. Use this syntax **[HYPERLINK\("callto:/"&Phone,"Click to dial"\)](#)**
5. Change the layout for the contact page so that the new "Call Main Phone" field is directly under the "phone" field.

You can add the mobile phone number with another formula field.

[HYPERLINK\("callto:/"&MobilePhone,"Click to dial"\)](#)

Your screen should look like this

Email:	marketing@mirage-systems.de
Phone:	213.232.0874
Extension:	
Call Main Phone:	Click to dial
Mobile:	+49160865432
Call Mobile:	Click to dial
Skype:	Miragecomputer

Add the fields for the Account and Lead screen.

Account: [HYPERLINK\("callto:/"&Phone,"Click to dial"\)](#)

Lead: [HYPERLINK\("callto:/"&Phone,"Click to dial"\)](#)

Create smart views and reports

The new fields can be added in any Views or Reports. This allows dialing directly from the view: 'all open leads' or any report.

See also

[Enable Dial with a Hyperlink](#) ⁵⁹

[Troubleshooting - Dial with a Hyperlink is not working](#) ¹⁷⁷

Configuration - [Application used for dialing with Hyperlink](#) ⁵⁸

5.1.7 Dial with the Clipboard

CTI Data Connector for Salesforce is able to analyze the clipboard contents and to extract a phone number.


If you copy a phone number using **CTRL+C / Edit Copy** into the clipboard, you can dial the number by clicking on the icon in the [taskbar](#) ²² with the right mouse button and selecting the option dial from clipboard. CTI Data Connector for Salesforce will analyze the clipboard contents and dial the first phone number found.

See also

[Troubleshooting - Hotkey is not working](#) ¹⁷⁸

Configuration - [Hotkey to dial phone number from the clipboard](#) ⁵⁸

5.1.8 Redial - using last called phone number

This option is only accessible with a right click on the phone icon  , option **Redialing**. It dials the phone number last used.

5.1.9 Dial with the Telephone Set

You can dial with your telephone set just as you have done previously. CTI Data Connector for Salesforce will recognize this dial automatically displaying the address with the contact person you are calling either within the Desktop Notification window or the caller information box.

5.2 Incoming Calls

CTI Data Connector for Salesforce offers a sophisticated caller identification.

The phone number of the caller is searched in Leads, Accounts or Contacts and displayed in the [SoftPhone](#)^{42]}.

[Watch a demo video](#)^{39]}

5.2.1 Video Tutorial

First watch the video, how the caller identification is working. Click on an image to start the video.



Video Tutorials

Tutorials

CTI Data Connector for salesforce



Incoming Calls

Listed on

appexchange™

CTI Data Connector for salesforce



Service Cloud Console

Listed on
appexchange™

5.2.2 How does the caller identification work?

The precondition for the caller identification is the **transmission of the phone number**. Suppressed phone numbers are treated as anonymous calls.

The identification of the phone number is a complex procedure but ensures a high recognition rate.

Analyse and format phone numbers of incoming calls

The phone number of an incoming call will be extended with the country code, while special prefixes and characters from the phone system will be removed - see configuration settings [PBX Configuration](#)^[71] and [Configuration Caller Identification](#)^[76].

If the phone call is a local call and the area code has not been transmitted, an area code will be automatically added - see [Dialing Rules](#).^[72]

For internal calls, the main number can be added - see [Prefix for internal numbers](#)^[63].

Identifying an address

Search step 1

The phone number, modified as described above, will be used for searching to obtain a 100% hit in the local copy of the salesforce database . If there is an exact match for a contact person, lead or account, the search will be terminated and the address with the caller data will be displayed within the Desktop Notification.

If there is no exact match, the search will be extended to Microsoft Outlook™ or the [phone book of the PBX](#)^[77] (if configured).

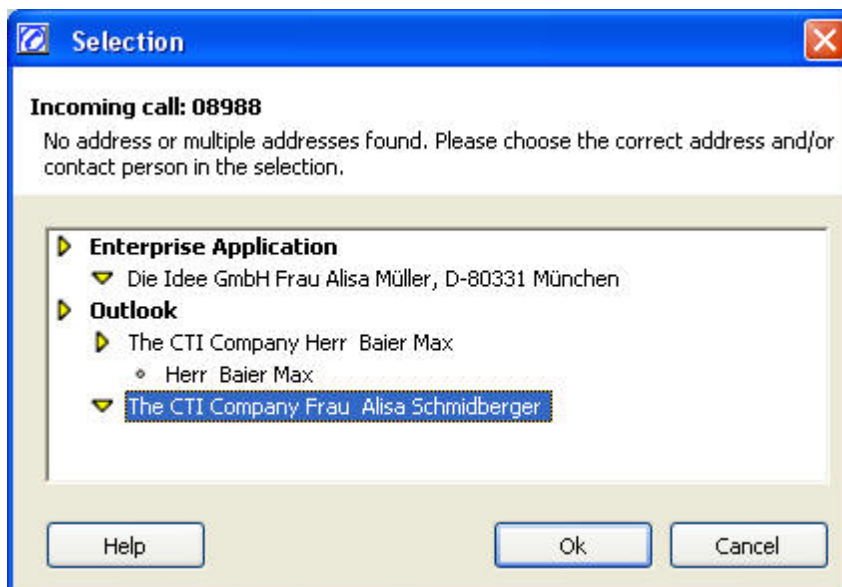
Search step 2

The phone number will be truncated beginning at the rightmost digit (see [configuration details](#)^[76]). If there is an exact match for an Account, the search will be terminated and the **Account with all contacts** will be displayed.

If there is no exact match, the search will be extended to Microsoft Outlook™ or the [phone book of the PBX](#)^[77] (if configured).

Search step 3

If several addresses are found in the second search step, a selection windows will be displayed where you can select the correct address (only if the option [Suppress multiple hits due to identical phone numbers](#)^[77] is **not** configured).



Press the button *Ok*, to select a company address or contact person or press the button *Cancel* to proceed without selecting an address for this call.

If the Desktop Notification for incoming calls is activated, there will be a message displayed in the notification window stating that the caller could not been identified. By clicking on the notification window, the above described selection screen will appear.

Search step 4

If no matching address can be found, the message **< no address identified >** will be displayed.

5.2.3 Necessary configuration settings for caller identification

Below is a list of configuration settings which have an impact on the caller identification. If the caller identification is not working, check these settings and also check [Troubleshooting - Incoming calls](#) ^[178].

Address information used for caller identification

Salesforce Lead, Account, Contact

- Addresses stored in the [PBX system](#) ^[77]

Configuration Settings

- Select correct [TAPI driver](#) ^[56]
- [Configuration Caller Identification](#) ^[76]
- TAPI Configuration - [truncate incoming phone number at](#) ^[63]
- TAPI Configuration - [Prefix incoming call](#) ^[62]
- TAPI Configuration - [Don't signal updated phone number during a call](#) ^[64]

If **internal** numbers are not identified correct, check:

- TAPI Configuration - [Prefix internal number](#) ^[63]
- [Minimum length](#) ^[72] of phone number indicating an external call

5.2.4 Salesforce SoftPhone

Incoming calls are signaled in the salesforce SoftPhone on the left side of the screen.

SoftPhone

Depending on the call state, buttons are enabled or disabled e.g. to hold or end a call.

The fields, which are displayed on the SoftPhone, can be configured in the [SoftPhone Layout](#) ^[95]

The screenshot shows a Salesforce Phone Call interface. At the top, there is a status bar with a headset icon and the text "Ready for Calls". Below this, a section titled "Line 1" contains call details: "Caller ID 00044734273833", "Dialed Number 00044734273833", "Duration 01:28", "Account United Whiskey ...", "Account Type Customer - Chan...", and "Account Number D98765". Below these details are two buttons: a red "End Call" button with a handset icon and a grey "Hold" button with a pause icon. A mouse cursor is hovering over the "Hold" button. Below the buttons is a section titled "Current Call Log" with a yellow background and the text "Log will auto-save when call ends.". Below this is a form for the call log with fields for "Subject" (containing "Call 05.06.2011 18:54"), "Related To" (a dropdown menu showing "Account: United Whiskey"), and "Comments" (containing the text "is interested in CTI Data Connector. Send quote"). At the bottom of the interface is a button labeled "Last Call".

You can type in a phone note (comment) which is **automatically** saved in the activity history including the *call type* (incoming / outgoing call) and *call duration*.

Call Result (Wrap Up)

After the call is terminated, you can benchmark the call by selecting a Call Result. This feature has to be turned on in the [call center adapter configuration](#)⁹³. It is saved with the phone note as an activity and is available for reporting. See *Call Center Reports* in salesforce.



For more information about the salesforce *call center adapter* search in the salesforce online help using the search term: **call center adapter overview**

5.2.5 Missed Calls (red icon)



If a call is missed, the phone icon turns red . You can now:

- Left mouse double click on the icon to directly open the dialog for missed calls
- Right mouse click on the icon, select Call History (incoming calls) - opens the dialog for missed calls



After opening the Call History, the icon color turns back to blue .



Anonymous calls are not signalled as missed calls.

5.3 Transfer a Call

Call Transfer allows to transfer a call from your phone to any other phone. This feature is only available during an **active** call.

A call transfer is a mechanism that enables a user to relocate an **active** call to another telephone by using the *call transfer* button and dialing the required location. The transferred call is either **announced** or unannounced (**blind transfer**).

If the transferred call is **announced**, the desired party/extension is notified of the impending transfer. This is done by putting the caller on hold and dialing the desired party/extension; they are then notified and, if they choose to accept the call, it is transferred over to them.

On the other hand, an unannounced (**blind**) transfer is self-explanatory: it is transferred without notifying the desired party/extension of the impending call. It is simply transferred to their line typing in the phone number and terminating the call.

Both options (announced and blind) are supported by CTI Data Connector for Salesforce **but not by all TAPI drivers**. If a TAPI driver does not support the transfer feature, this option will not be available in CTI Data Connector for Salesforce.



The way how this feature works in detail depends on the PBX and TAPI driver.

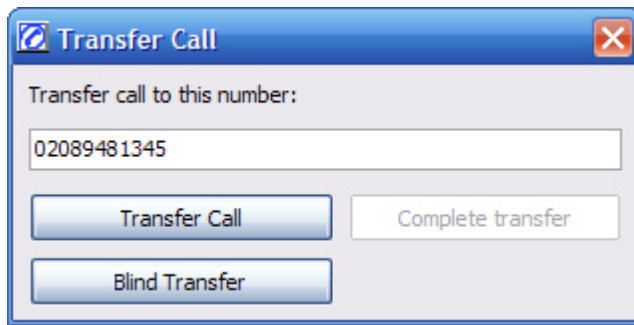
5.3.1 Announced Transfer

If the transferred call is **announced**, the desired party/extension is notified of the impending transfer. This is done by putting the caller on hold and dialing the desired party/extension; they are then notified and, if they choose to accept the call, it is transferred over to them.

During an active call you can either

- **Left** click on the phone icon and select *Transfer Call* or
- Use the *Transfer Call* button within the [Control Centre](#)²⁴⁾

A new screen appears. Type in the number to which the call should be transferred and press the button **Transfer Call**.



You then have 2 options:

- Press **Back to Active Call** to talk again with the caller *or*
- Press **Complete Transfer** to transfer the call to the desired party

See also

[Blind Transfer](#) ⁴⁶

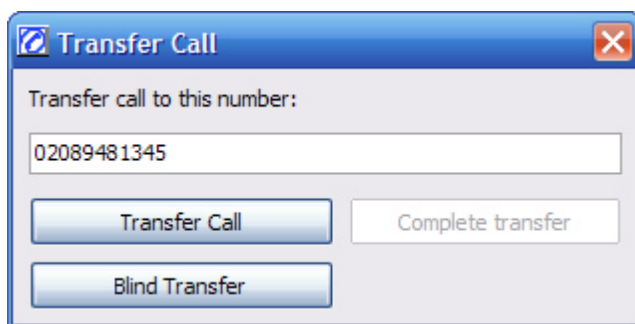
5.3.2 Blind Transfer

A **blind transfer** is a call without notifying the desired party/extension of the impending call. It is simply transferred to their line typing in the phone number and terminating the call.

During an active call you can either

- **Left** click on the phone icon and select *Transfer Call* or
- Use the *Transfer Call* button within the [Control Centre](#) ²⁴

A new screen appears. Type in the number to which the call should be transferred and press **Blind Transfer**. The call is transferred to the desired party.



See also

[Announced Transfer](#) ⁴⁵

5.4 Service Cloud Console

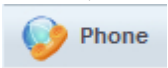
The Service Cloud Console requires a special setup within Salesforce. See Salesforce help for detail information.

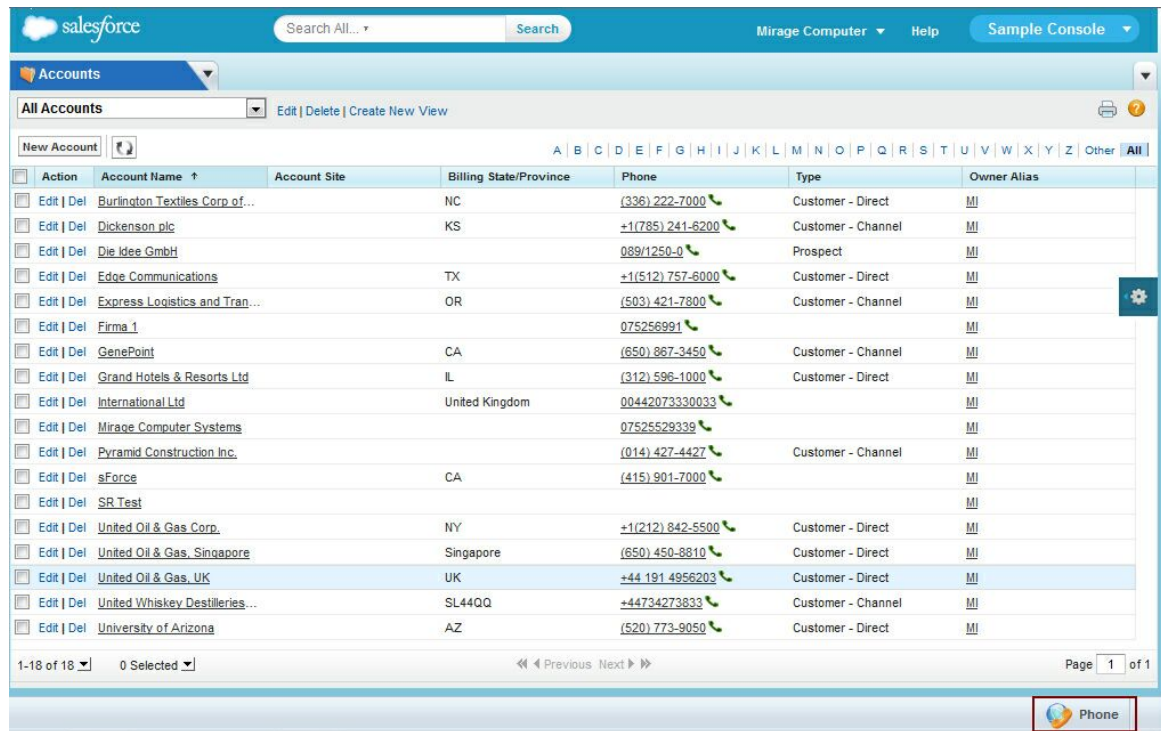
The SoftPhone options in the Service Cloud Console are a bit different in comparison to the standard Salesforce setup.



- [Video - Service Cloud Console](#)

Main Screen - Service Cloud Console

Using the Service Cloud console, the SoftPhone is hidden in the lower right corner of the window. Click on the icon  to open the SoftPhone



Action	Account Name	Account Site	Billing State/Province	Phone	Type	Owner Alias
Edit Del	Burlington Textiles Corp of...		NC	(336) 222-7000	Customer - Direct	MI
Edit Del	Dickenson plc		KS	+1(785) 241-6200	Customer - Channel	MI
Edit Del	Die Idee GmbH			089/1250-0	Prospect	MI
Edit Del	Edge Communications		TX	+1(512) 757-6000	Customer - Direct	MI
Edit Del	Express Logistics and Tran...		OR	(503) 421-7800	Customer - Channel	MI
Edit Del	Firma 1			075256991		MI
Edit Del	GenePoint		CA	(650) 867-3450	Customer - Channel	MI
Edit Del	Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	MI
Edit Del	International Ltd		United Kingdom	0044207330033		MI
Edit Del	Mirage Computer Systems			07525529339		MI
Edit Del	Pyramid Construction Inc.			(014) 427-4427	Customer - Channel	MI
Edit Del	sForce		CA	(415) 901-7000		MI
Edit Del	SR Test					MI
Edit Del	United Oil & Gas Corp.		NY	+1(212) 842-5500	Customer - Direct	MI
Edit Del	United Oil & Gas, Singapore		Singapore	(650) 450-8810	Customer - Direct	MI
Edit Del	United Oil & Gas, UK		UK	+44 191 4956203	Customer - Direct	MI
Edit Del	United Whiskey Distilleries...		SL44QQ	+44734273833	Customer - Channel	MI
Edit Del	University of Arizona		AZ	(520) 773-9050	Customer - Direct	MI

Service Cloud Console - Main Screen

Incoming Call

Incoming calls are signaled in the Salesforce SoftPhone on the **right** side of the screen. The Lead/Account/Contact details are displayed in a **new TAB**. For more details of the SoftPhone functionality see [Salesforce SoftPhone](#)^[42]

The screenshot displays the Salesforce Service Cloud Console interface. At the top, the Salesforce logo and a search bar are visible. The navigation bar includes 'Accounts' and 'Edge Communications' tabs. The main content area shows the contact detail for 'Ms. Rose Gonzalez' under the 'Edge Communications' tab. The contact details include fields for Name, Account Name, Title, Department, Birthdate, Reports To, Lead Source, Mailing Address, Phone, Home Phone, Mobile, Other Phone, Fax, Email, Assistant, Asst. Phone, and Other Address. Below the contact details is the 'Interaction Log' section, which includes a 'Save Log' button and a 'Save & New Log' button. The 'Interaction Log' table shows a log entry for 'Ms. Rose Gonzalez' with a subject of 'Call 12/31/2011 5:25 PM'. An 'Incoming Call - SoftPhone' overlay is visible on the right side of the screen, showing call details such as 'Line 1 On Call', 'Caller ID', 'Duration', 'Contact', 'Department', 'Title', 'Languages', and 'Assistant's Name'. The overlay also includes buttons for 'End Call' and 'Hold'.

Incoming Call - SoftPhone

Interaction Log

The special feature of the Service Cloud Console is the Interaction Log. You enter the phone note in the Interaction Log and not in the SoftPhone. When the phone call ends, the data is automatically saved as an activity.

The screenshot shows the Salesforce interface for a contact named Ms. Rose Gonzalez. The top navigation bar includes the Salesforce logo, a search bar, and links to 'Mirage Computer', 'Help', and 'Sample Console'. The main header shows 'Accounts' and 'Edge Communications'. The contact details section includes fields for Name, Account Name, Title, Department, Birthdate, Reports To, Lead Source, Mailing Address, Phone, Home Phone, Mobile, Other Phone, Fax, Email, Assistant, Asst. Phone, and Other Address. The Interaction Log section is expanded, showing a list of interactions with columns for Name, Subject, and Related To. A text box labeled 'Enter your notes here...' is highlighted with a red border.

Interaction Log - Enter phone note

5.5 Reports

All phone calls are stored as a task and are available in salesforce reports. The default salesforce call center reports can be found in the folder: *Call Center Reports*.

The screenshot shows the Salesforce Reports interface. The top navigation bar includes links to 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Forecasts', 'Contracts', 'Cases', 'Solutions', 'Products', 'Reports', and 'Do'. The 'Reports' section is active, showing a list of reports under the 'Call Center Reports' folder. A table lists the reports with their names and descriptions.

Report Name	Description
My Team's Calls This Week	What calls have my agents handled this week?
My Calls Today	What calls have I handled today?
My Calls This Week	What calls have I handled this week?

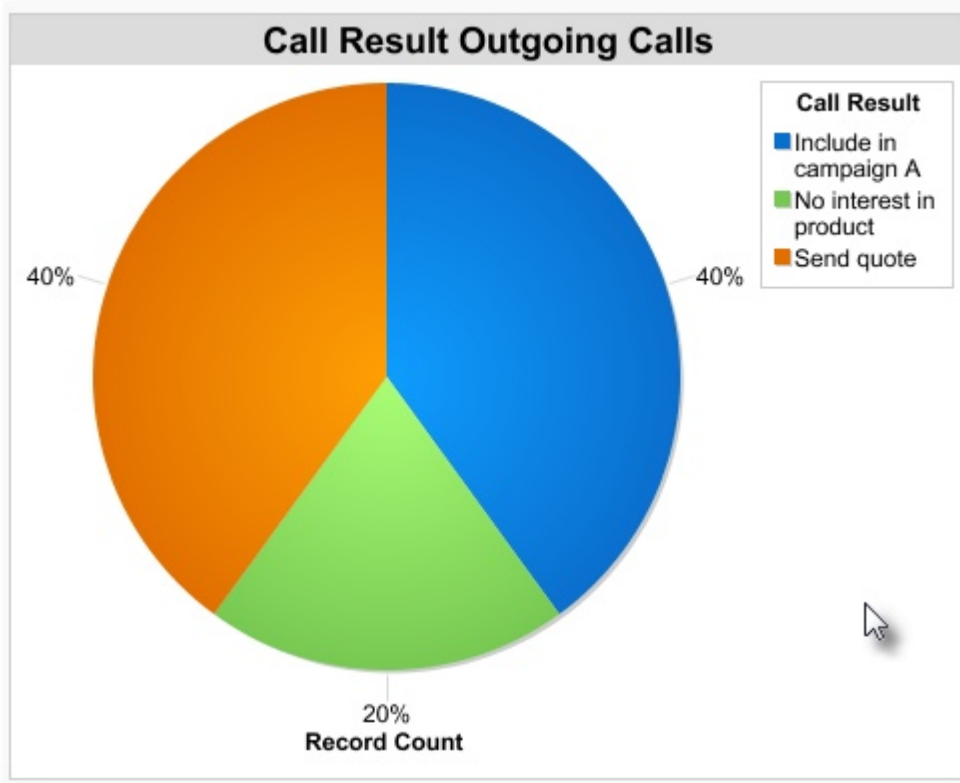
You can create any type of reports like

- Incoming calls of a day or week
- Calls where nobody could be reached (call duration is empty or 0)

- Report about the [call results](#) ⁴³

If you create a report select report category: **Activities** and report type: **Tasks and Events**

Example



Part



VI

6 Configuration Wizard

6.1 Introduction

The Configuration Wizard of CTI Data Connector for Salesforce offers several steps for making configuration settings. You can navigate through the pages with the buttons **Next** and **Back**. To apply the new settings, the program for [formatting phone numbers](#)^[82] will be automatically started on the local PC.

The Configuration Wizard can have **different options and steps depending on the installation**. The maximum is 6 steps and an introduction page. Note that this description may differ from your installation. It is mandatory to configure the [minimum configuration](#)^[21].

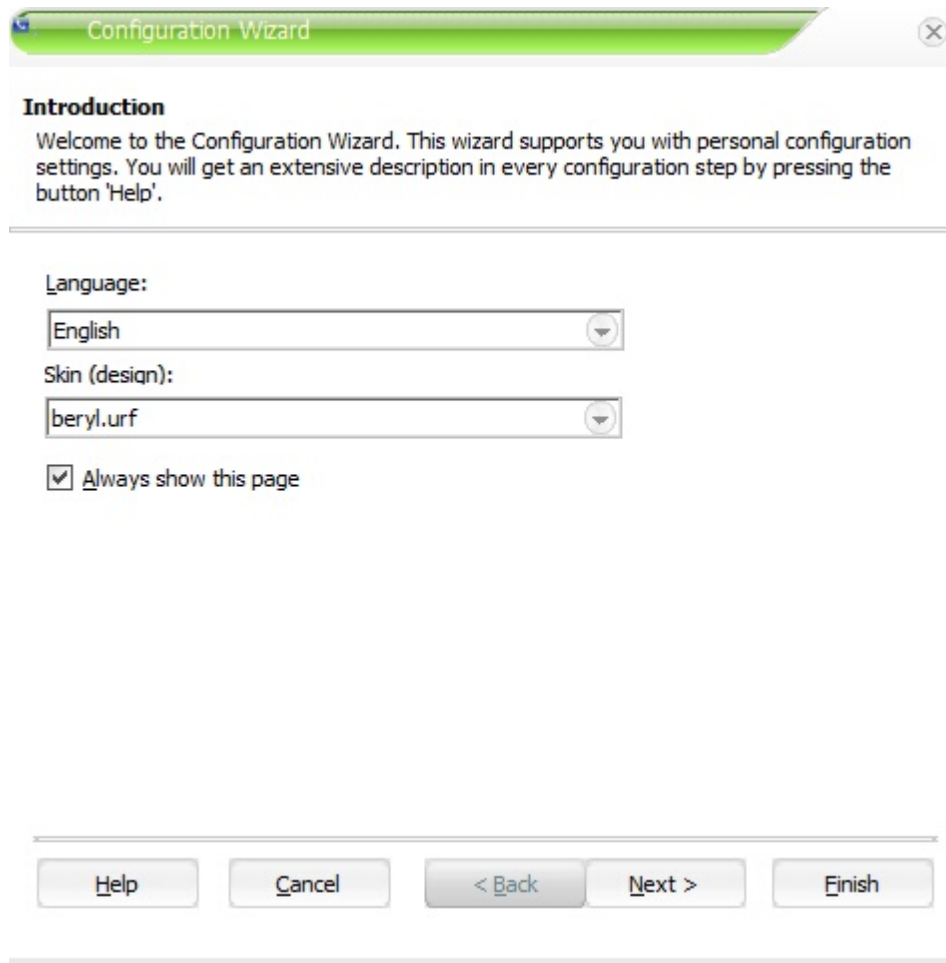
How to start the Configuration Wizard?

Start the Configuration Wizard by clicking on the icon in the [taskbar](#)^[22] with the right mouse button and select the option **Configuration Wizard** or select the menu *Extras* - **Configuration Wizard** in the [control centre](#)^[24].

Overview of all configuration steps

- Introduction - [Select the language](#)^[54] for CTI Data Connector for Salesforce
- Configuration of the [TAPI device driver](#)^[56], [Hotkeys](#)^[58], [Expert Settings](#)^[60] and [Browser Dialing](#)^[59]
- Configuration of the [PBX](#)^[71] and [Caller Identification](#)^[76]

6.2 Select Language



The screenshot shows a 'Configuration Wizard' dialog box with a green title bar. It contains an 'Introduction' section with a welcome message. Below this are two dropdown menus: 'Language' set to 'English' and 'Skin (design)' set to 'beryl.urf'. There is a checked checkbox for 'Always show this page'. At the bottom are five buttons: 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'.

Configuration Wizard

Introduction

Welcome to the Configuration Wizard. This wizard supports you with personal configuration settings. You will get an extensive description in every configuration step by pressing the button 'Help'.

Language:
English

Skin (design):
beryl.urf

☒ Always show this page

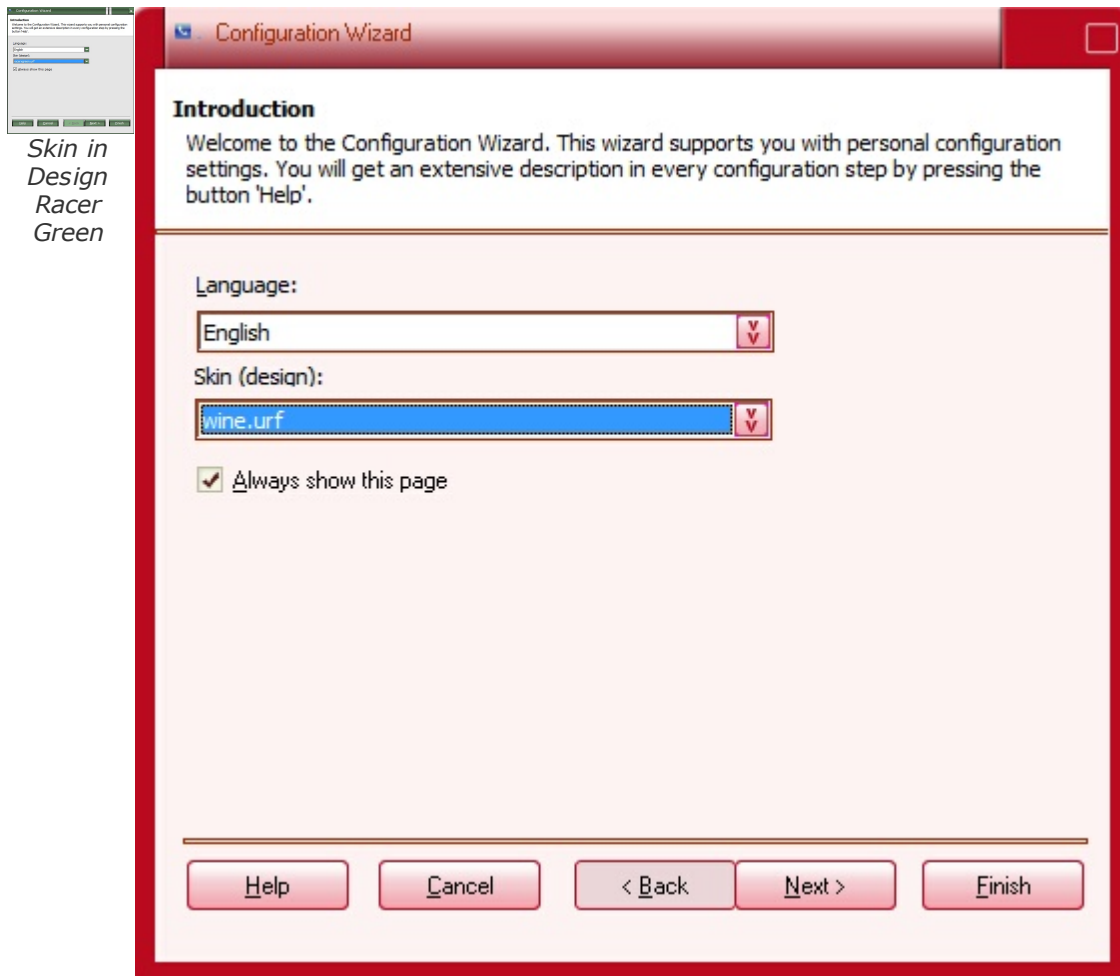
Help Cancel < Back Next > Finish

Language

You can select the language for the application.

Skin (Design)

A skin changes the look & feel (design) of the application. Just try to find the one you like best.



Skin in Design Wine

If you want to skip this screen in the future, deselect *Always show this page*.

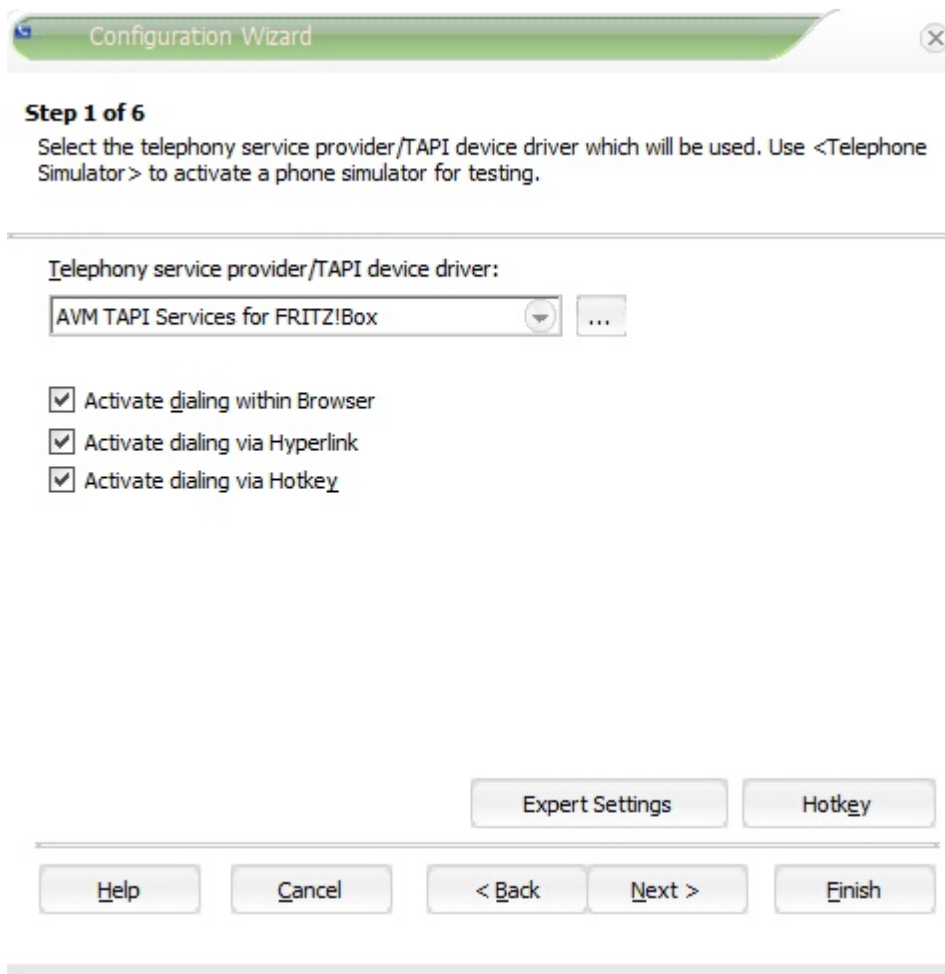
6.3 TAPI device driver , Hotkey, Expert Settings, Browser Dialling

Here you can configure the [TAPI driver](#)^[56] and the dialling options which should be activated.

- Activate dialling within a [Browser](#)^[59]
- Activate dialling via [Hyperlink](#)^[59]
- Activate dialling via [Hotkey](#)^[58]


If available, the dialog for [Expert Settings](#)^[60] can be started. Using the button [Hotkey](#)^[58],

you can configure the [Hotkey](#)^[34] combination for outgoing calls.

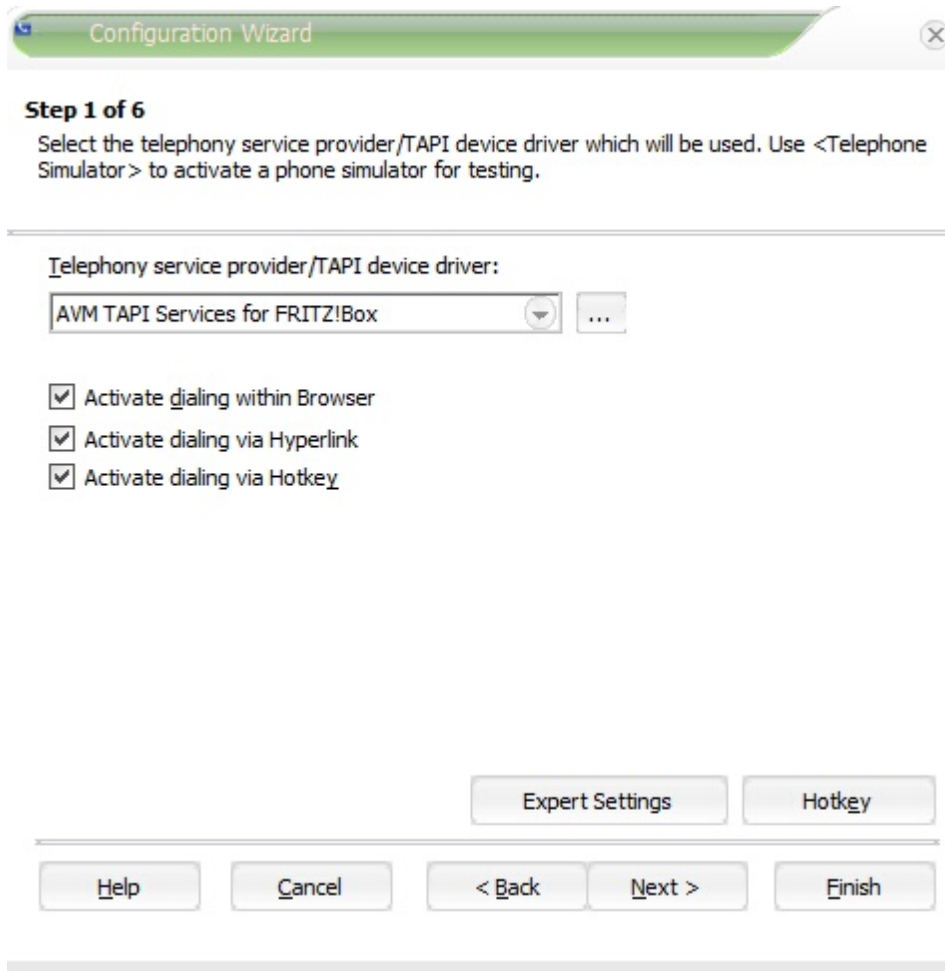


6.3.1 TAPI Driver

Select the TAPI device driver for incoming and outgoing calls from the list box. See details for TAPI - [Where do I find the TAPI driver?](#)^[142]

With the button  a window can be opened where all functions supported by the TAPI driver will be shown.

With the driver <**Telephone Simulator**> CTI Data Connector for Salesforce can be tested with a [phone simulator](#)^[27] if no TAPI enabled phone is available.



Step 1 of 6

Select the telephony service provider/TAPI device driver which will be used. Use <Telephone Simulator> to activate a phone simulator for testing.

Telephony service provider/TAPI device driver:

AVM TAPI Services for FRITZ!Box

☒ Activate dialing within Browser

☒ Activate dialing via Hyperlink

☒ Activate dialing via Hotkey

Expert Settings Hotkey

Help Cancel < Back Next > Finish



If your TAPI driver is not listed here see: [I cannot select my TAPI driver in the configuration wizard](#)¹⁷²

See also

[Where do I find this screen?](#)⁵⁵

[System Requirements](#)¹⁴¹ TAPI driver

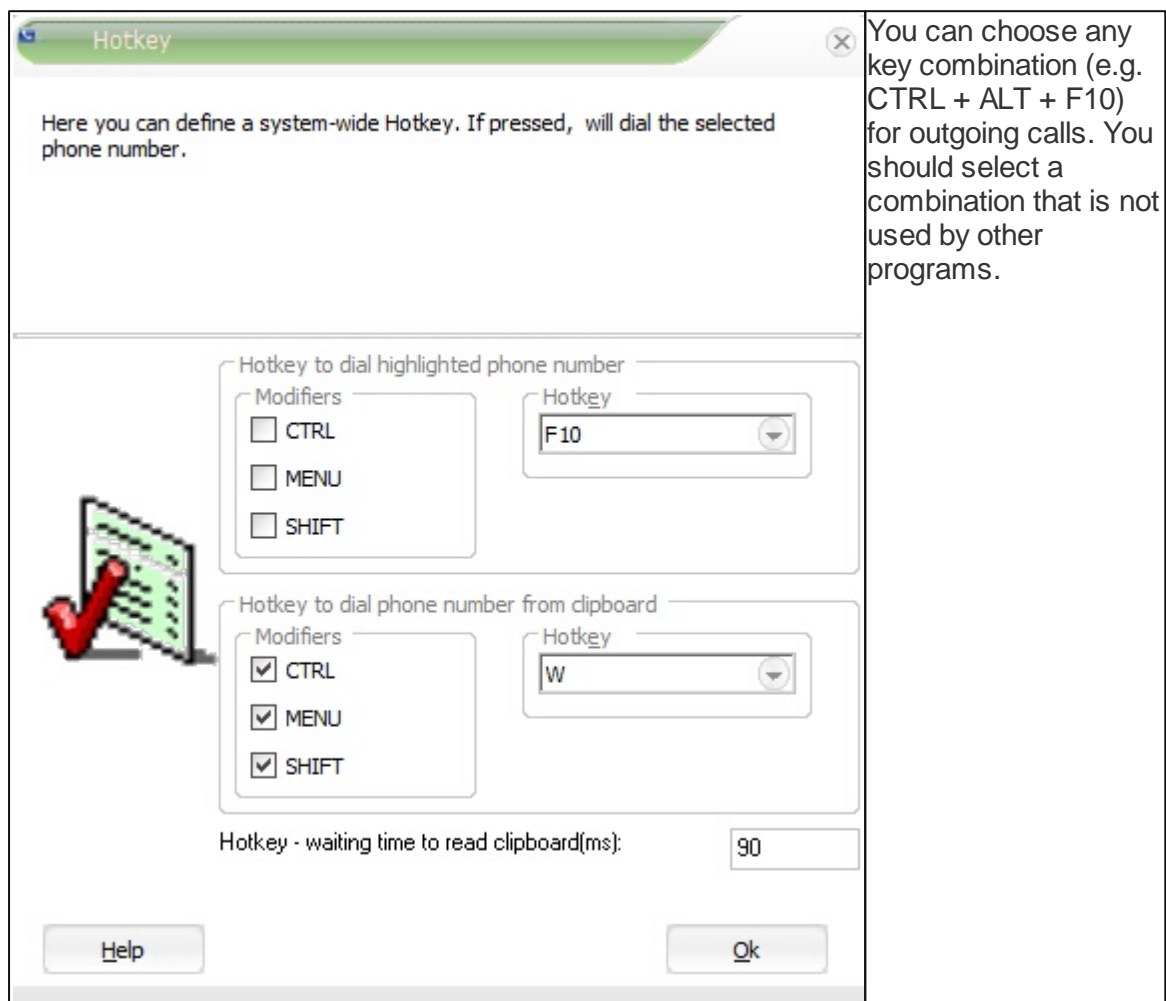
[Where do I find the TAPI driver?](#)¹⁴²

6.3.2 Configure Hotkeys

Hotkeys are used to dial with a shortcut from any application. You first have to select [Activate dialing via Hotkey](#)^[55] before it can be used. Press the button *Hotkey* for configuration.

Hotkey to dial highlighted phone number

This Hotkey allows to dial by highlighting a phone number and press the Hotkey. For details see [Dial with a Hotkey](#)^[34]. The default value is **F10**.



Hotkey to dial phone number from the clipboard

This Hotkey allows to dial a phone number which is stored in the clipboard. For details see [Dial with the Clipboard](#)^[38]. The default value is CTRL + MENU + SHIFT + W to make sure that other programs are not affected. If you use this functionality change the default to a value which:

- is not used by other programs
- which can be accessed easily - e.g. CTRL+C = Copy value to clipboard - CTRL + D = dial (note: CTRL D could be used by other applications for the delete function)

Hotkey - waiting time to read clipboard

If the [Hotkey](#)^[34] for dialing is not working, then either the Hotkey is already in use (change Hotkey) or other applications like the Office clipboard manager are blocking the clipboard. The Hotkey copies the phone number into the clipboard and therefore needs access to the clipboard. Increase the waiting time before information of the clipboard will be read. The time is specified in a thousandth part of a second. Default time is 10 = 1 hundredth part of a second. The maximum value is 98.

See also

[Where do I find this screen?](#)^[55]

[Troubleshooting - Hotkey is not working](#)^[178]

[Dial with the Clipboard](#)^[38]

[Dial with a Hotkey](#)^[34]

6.3.3 Configure dial options for Browser

There are 2 Browser options which can be enabled.

Activate dialing within Browser

This option allows to dial via right mouse click within the Browser. For details see [Dial within the Browser](#)^[35].



Dial with right mouse button is available only in the Internet Explorer


Activate dialing via Hyperlink


This option allows to dial via Hyperlink. For details see [Dial with a Hyperlink](#)^[187].

Dialing via [Hotkey](#)^[58] is also working within a Browser.

See also

[Where do I find this screen?](#)  55

[Troubleshooting - Dial with a Hyperlink is not working](#)  177

Configuration - [Application used for dialing with Hyperlink](#)  58

6.4 Expert Settings

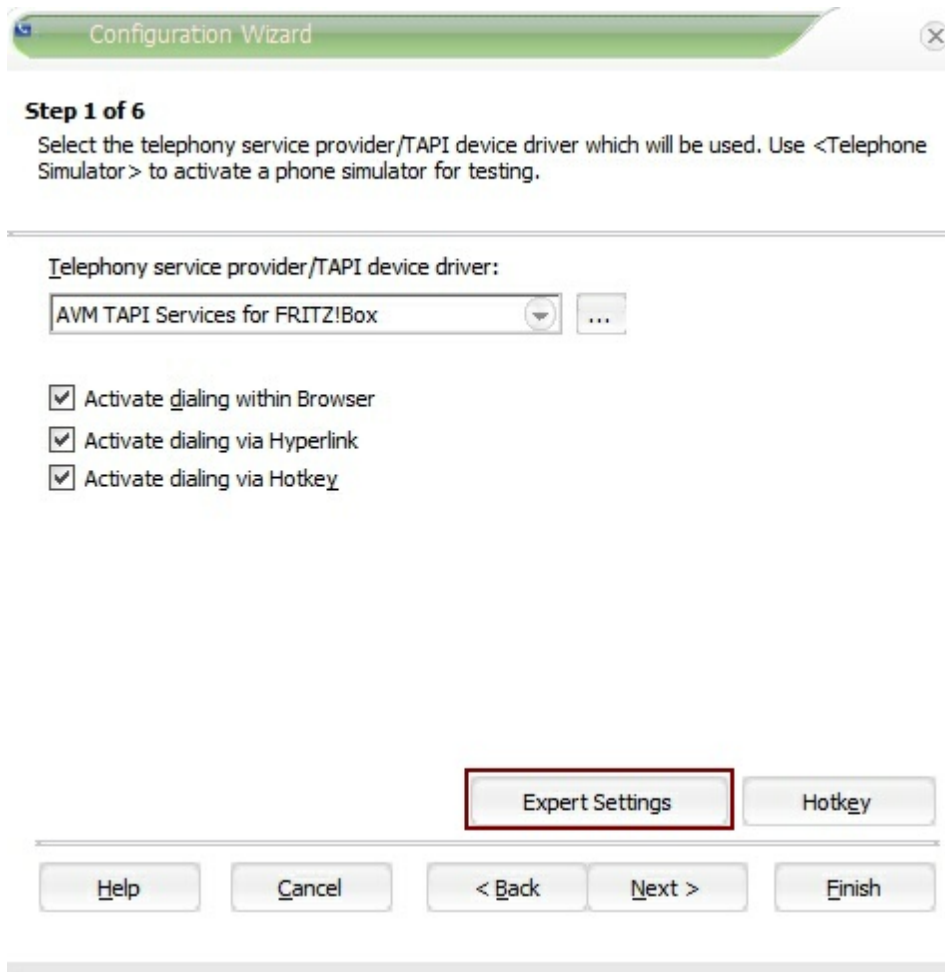
CTI Data Connector for Salesforce allows to configure a lot of additional settings which have an impact on:

- Handling of a call
- Provide a workaround for TAPI driver issues
- Handling of the development interface to other applications
- and other specific settings



Only experienced users should change these settings

Depending on the system configuration, this option can be disabled. Otherwise press the button *Expert Settings* in Step 1 of the Configuration Wizard.



Step 1 of 6

Select the telephony service provider/TAPI device driver which will be used. Use <Telephone Simulator> to activate a phone simulator for testing.

Telephony service provider/TAPI device driver:

AVM TAPI Services for FRITZ!Box

☒ Activate dialing within Browser

☒ Activate dialing via Hyperlink

☒ Activate dialing via Hotkey

Expert Settings Hotkey

Help Cancel < Back Next > Finish

6.4.1 TAPI Configuration

The following settings have an impact on the TAPI interface or call handling.

The screenshot shows a dialog box titled "Expert Settings" with a close button (X) in the top right corner. Below the title bar, there is a message: "You can configure additional settings here. Only make changes if you are aware of the impacts of the modification." The main area of the dialog is titled "TAPI Configuration" and contains several tabs: "TAPI Configuration", "Help and Welcome", "Development API", and "Miscellaneous Settings". The "TAPI Configuration" tab is active and shows the following settings:

- External call - Prefix:**
 - Incoming:** A text input field with a radio button next to it labeled "Cut prefixes".
 - Outgoing:** A text input field with a radio button next to it labeled "Place prefixes".
- Prefix for internal numbers:** A text input field.
- Provider Postfix:** A text input field.
- Truncate incoming phone number at:** A text input field.
- Ignore Fake Number:** A text input field.
- ☐ Don't signal updated phone number during a call
- ☒ Controlling CTI Application
- ☐ Activate call logging
- Send Log file:** A button.

At the bottom of the dialog, there are three buttons: "Help", "Cancel", and "Ok".

External call - Prefix

If the TAPI driver adds a prefix for an external call, this prefix can be removed. Otherwise prefixes can be added before the number is dialed.

Example

The phone number 0734273830 is signalled as **00**734273830. In this case the prefix 0 has to be removed to allow a correct caller identification.

If the TAPI driver signals the incoming phone number **without a leading 0**, then configure: Place prefix, Incoming.

Example

The phone number 0734273830 is signalled as 734273830. In this case the prefix 0 has to be added for incoming calls to allow a correct caller identification.



By default, the prefix to get an outside line is added as *Outgoing, cut prefix* to automatically remove the prefix after dialing.

Prefix for internal numbers

This function allows to place a prefix **in front of** an internal number. It is not used for dialling - only for **incoming and outgoing caller identification**.

Example

For all employees the complete phone number is stored in the database, e.g. 07342/7383-12. For an incoming call, only the extension number is signalled, e.g. 12. In order to find the name of the calling person, the prefix 7383 has to be added. Additionally, CTI Data Connector for Salesforce adds the area code, configured in the [country settings](#) ⁵⁵.

Configure **7383** for the prefix which will firstly create the number 738312 and then will add the area code. This results in the new number 07342738312 which will allow to identify the caller.

Provider Postfix

This function allows to add a postfix **at the end** of a phone number for **outgoing calls**.

Example

IP providers often require a # at the end of the phone number to dial the number instantly.

Configure **#** for the postfix which would dial 07342738312#

Truncate incoming phone number at:

This option is needed with IP phones and a TAPI driver which passes the phone number with IP information.

Example

The phone number is passed as [0734273830@myprovider.com](#). This option allows to truncate all characters after the specified character - e.g. @.

Ignore Fake Number

Some TAPI drivers firstly send a special number for **outgoing or incoming calls** and then the correct phone numbers. To allow for the special number being treated as a fake

number being ignored, configure the fake number.

Example

The TAPI driver firstly sends 879 and then the correct phone number.

Configure **879** as the fake number.

You can configure a list of numbers, separated by a semicolon.

Example

879;888;890

Don't signal updated phone number during a call

If a phone number changes during a call (e.g. because the call was redirected from the main switchboard), the new phone number will be updated by default in the Desktop Notification. The update can be suppressed by checking this option.

Controlling CTI Application

If a application uses the windows dialer, CTI Data Connector for Salesforce can be configured to handle all requests that go to the windows dialer. This allows to use the call logic for outgoing calls of CTI Data Connector for Salesforce .

Activate call logging

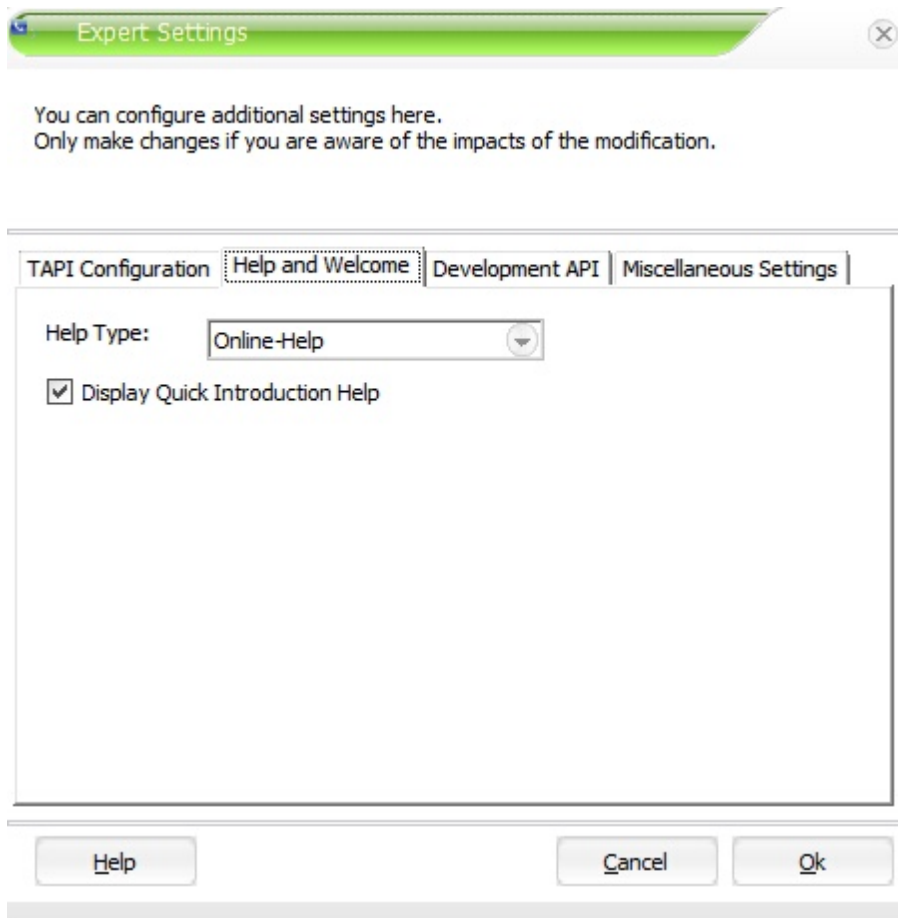
This configuration is intended for service purposes. It logs the events of the TAPI device driver. See [Troubleshooting - sending a log file how to send a log file](#)¹⁸⁵ to support.

See also

[Where do I find this screen?](#)⁶⁰

6.4.2 Help and Welcome

The following settings allow for configuring help options.



Help Type

2 different types of help is offered

- Online Help - this is the most up-to-date help (updated even after program release). It is recommended using this help
- Offline Help - this help program is stored on the local hard disk drive and can be used, if no Internet connection is available



The offline help works with Windows XP SP2 / Vista only with a single user installation

Display Quick Introduction Help

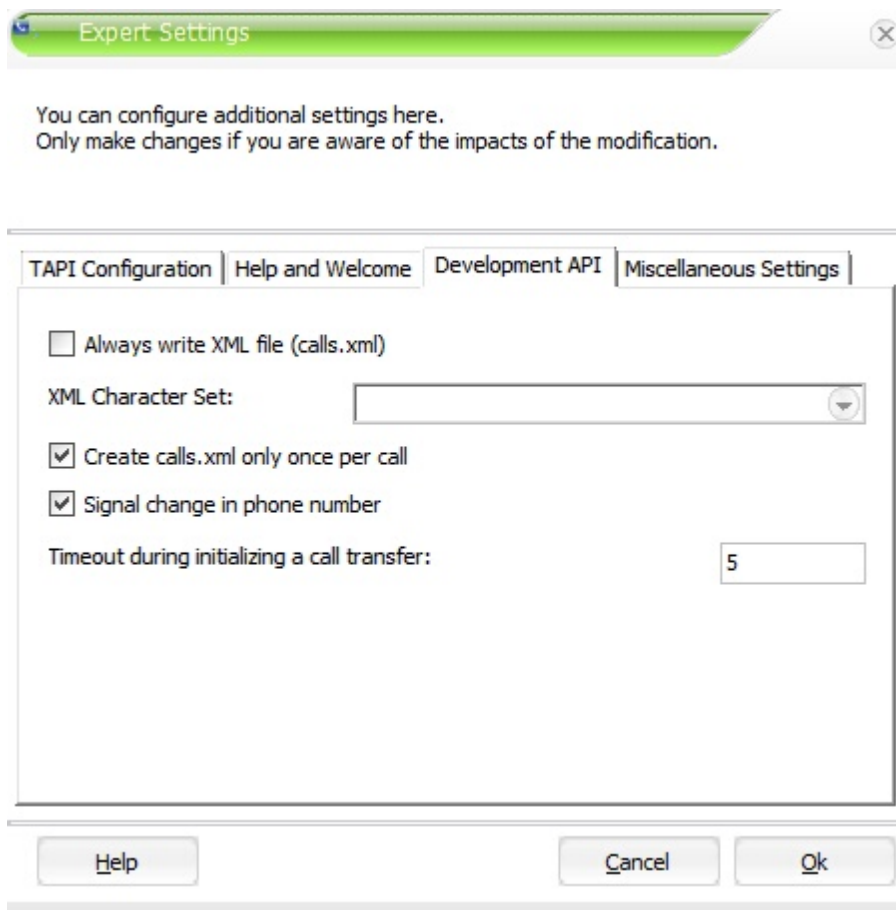
Check this option to have the [Welcome Screen](#)¹⁹ displayed during each program start.

See also

[Where do I find this screen?](#)⁶⁰

6.4.3 Development API

These settings have an impact on the development API using the calls.xml and jobs.xml file to handle phone events.



Always write XML file (calls.xml)

The default option specifies that a call is passed to an external program only after clicking

on the Desktop Notification window. This option allows to always pass the caller data via the calls.xml file independently from clicking on the Desktop Notification.

XML Character Set

The character set for the calls.xml and jobs.xml file can be changed. This is necessary in order to pass caller data stored with different character set. Default is UTF-8.

Example

The address data is stored in the database with Greek characters. In order to pass the address data it is necessary to change the default character set.



The character set of the Desktop Notification cannot be changed.

Create calls.xml only once per call

If checked, the calls.xml will be created only once per call. Otherwise the file will be created for each TAPI event like ring, hold, terminate, provided that the user clicks **once** on the Desktop Notification. See also: [Always write XML file \(calls.xml\)](#)^[66].

Signal change in phone number

Using this option will signal in the calls.xml file, if the phone number has changed **during a call**. This event can happen when a call is redirected. See also: [Don't signal updated phone number during a call](#)^[64]

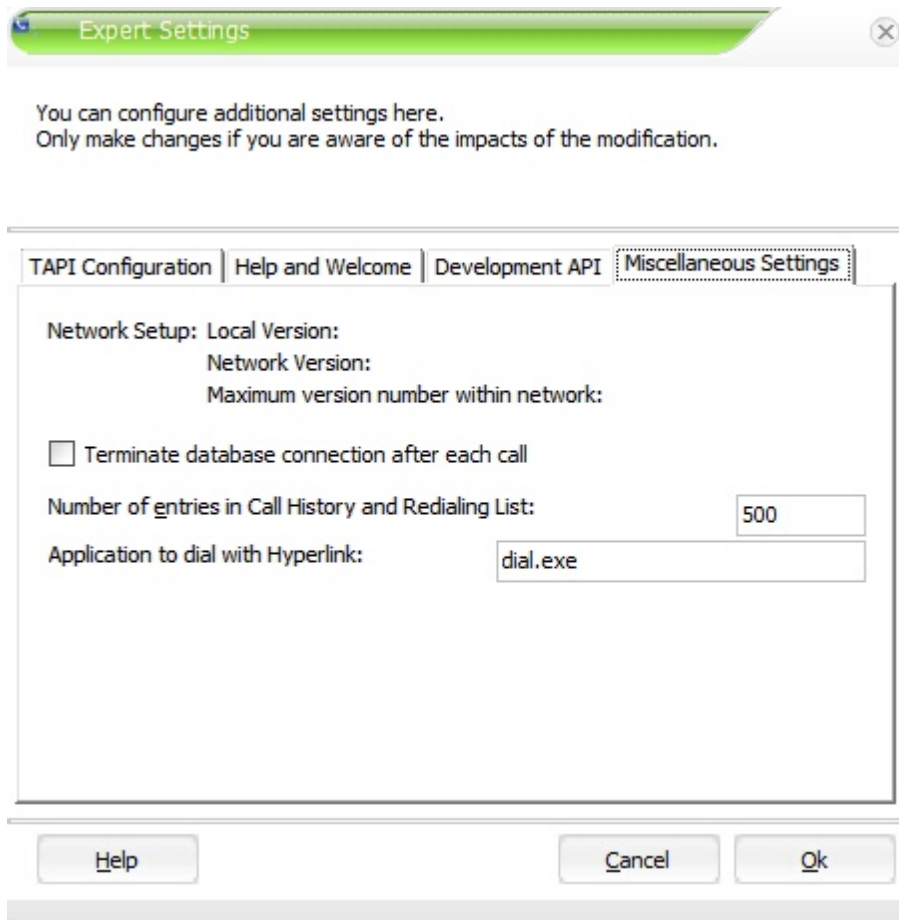
Timeout during initializing a call transfer

This switch is used for the option [Transfer a Call](#)^[45]. It is the waiting time in seconds until the PBX responds to the event. The default value is 5 seconds, maximum is 60 seconds.

See also

[Where do I find this screen?](#)^[60]

6.4.4 Miscellaneous Settings



Terminate database connection after each call

If an Access database is used in a network environment and not all PCs shut down CTI Data Connector for Salesforce during night, this database can never be backed up because it is always in use. Use this option to allow for back-up or compression of an database.



Depending on the usage of the database this option may significantly slow down the performance.

Never use this option on the server and never in combination with an SQL database.

Number of entries in Call History and Redialing list

Define the number of entries in the call history list.

Application to dial with Hyperlink

Defines the executable which is used by Windows **callto:** command - see [Dial with a Hyperlink](#)  187.

This command may be used by other applications like Skype. If CTI Data Connector for Salesforce should use this functionality, disable in Skype: callto: links in other applications. The default value for CTI Data Connector for Salesforce is **dial.exe**.

See also

[Where do I find this screen?](#)  60

6.5 Configuration of the PBX and Caller Identification

This screen allows to specify [PBX specific settings](#)^[71] and how to handle [caller identification](#)^[76].

Configuration Wizard

Step 2 of 6
Specify the specific settings of the PBX and the configuration for caller identification.

PBX Configuration | Configuration Caller Identification

Dial tone digits for external calls:

Minimum length of phone number indicating an external call:

See also

[PBX Configuration](#)^[71]

[Dialing Rules](#)^[72]

[Dialing Rules for US / Canada](#)^[73]

[Configuration Caller Identification](#)^[76]

6.5.1 PBX Configuration

Basic Configuration settings for handling outgoing calls and PBX specific functions.

The screenshot shows a window titled "Configuration Wizard" with a close button in the top right corner. Below the title bar, it says "Step 2 of 6" and "Specify the specific settings of the PBX and the configuration for caller identification." The main area has two tabs: "PBX Configuration" (selected) and "Configuration Caller Identification". Under the "PBX Configuration" tab, there are two input fields: "Dial tone digits for external calls:" with the value "9" and "Minimum length of phone number indicating an external call:" with the value "3". Below these fields is a button labeled "Dialing Rules". At the bottom of the window, there are five buttons: "Help", "Cancel", "< Back", "Next >", and "Finish".

Dial tone digits for external calls

Specify the digit which is necessary to get an outside line for external calls, e.g. 0 or 9. This prefix is added automatically for external calls. Also see [dialing Rules](#)⁷² for extended configuration.

Minimum length of phone number indication an external call

For distinguishing between internal and external calls type in the maximum length of the internal phone number + 1 (Example: The internal phone numbers are 0 to 99; an external number would be defined by using 3 digits).

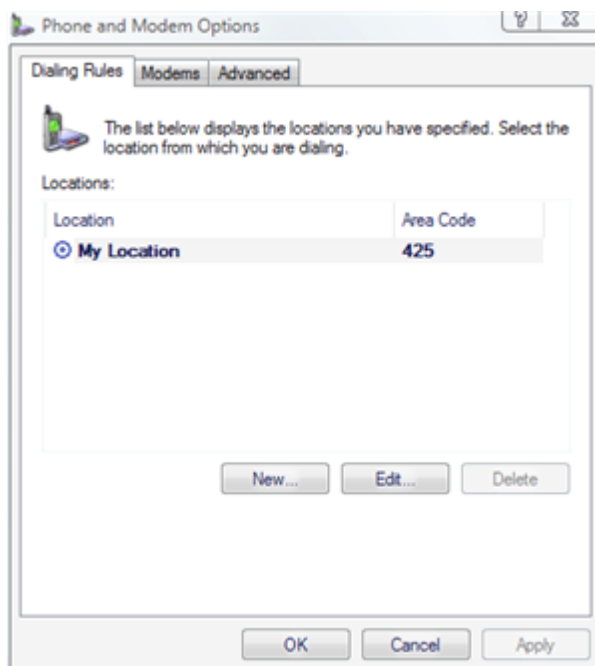
See also

[Dialing Rules](#)^[72]

[Dialing Rules for US / Canada](#)^[73]

6.5.1.1 Dialing Rules

With the button **dialing Rules** the country settings and area code settings can be modified. It is important to configure the correct **area code** and **country code**.



Outside US / Canada it is sufficient to add the country/ region and the area code **without the leading 0**. Never add a dialing rule because rules like prefixes are covered within CTI Data Connector for Salesforce settings.

Example

Area Code: 425- never use **0425** for area code as 0 is part of the dialing rule which is

automatically retrieved from the country settings.

For **US / Canada** see special considerations for [dialing rules](#)^[73].

Outside US / Canada: Press the button *Edit*: Select your **Country/Region** and Area Code without the leading 0 or 1. The fields Outside Line for local calls, long-distance calls, carrier code for long-distance calls and international calls **must be empty**.

The screenshot shows a 'New Location' dialog box with the following fields and options:

- Location name:** A text input field.
- Country/region:** A dropdown menu currently showing 'United States'.
- Area code:** A text input field containing '425'.
- Dialing rules:** A section with the instruction 'When dialing from this location, use the following rules:' and four empty input fields for:
 - To access an outside line for local calls, dial:
 - To access an outside line for long-distance calls, dial:
 - Use this carrier code to make long-distance calls:
 - Use this carrier code to make international calls:
- To disable call waiting, dial:** A checkbox that is currently unchecked, followed by a dropdown menu.
- Dial using:** Two radio buttons, 'Tone' (which is selected) and 'Pulse'.
- Buttons:** 'OK', 'Cancel', and 'Apply' buttons at the bottom right.

See also

[Where do I find this screen?](#)^[71]

6.5.1.2 Dialing Rules for US / Canada

As there are different dialing rules for local and long distance calls in the USA, these rules have to be defined within CTI Data Connector for Salesforce **AND** the Windows dialing rules.

Example

Your local area code is 214. To dial an outside line you firstly have to dial 9. In some places, some prefixes within an area code are considered local calls, and other prefixes within the same area code are considered long distance. Let us assume 469 and 972

should be treated as a local call.

CTI Data Connector for Salesforce has to dial:

- 9.214.415.9160
- 9.469.415.9160
- 9.972.415.9160

and for long distance calls

- 91 407-398-6913

Configuration within CTI Data Connector for Salesforce

Set [Dial tone digits for external calls](#)  to 9

Configuration within Windows

Press the button *dialing Rules*, or within Windows select Open Phone and Modem Options by clicking the **Start** button, clicking **Control Panel** and then clicking **Phone and Modem Options**.

TAB - General

Configure: Area code: 214; outside line for local calls: 9; outside line for long distance calls: 9

The screenshot shows the 'New Location' dialog box with the 'Area Code Rules' tab selected. The 'General' tab is also visible. The 'Location name' field is empty. The 'Country/region' dropdown is set to 'United States'. The 'Area code' field is set to '214'. The 'Dialing rules' section contains the following fields: 'To access an outside line for local calls, dial:' with value '9', 'To access an outside line for long-distance calls, dial:' with value '9', 'Use this carrier code to make long-distance calls:' (empty), and 'Use this carrier code to make international calls:' (empty). There is a checkbox for 'To disable call waiting, dial:' which is unchecked. The 'Dial using' section has 'Tone' selected and 'Pulse' unselected. The 'OK', 'Cancel', and 'Apply' buttons are at the bottom.

TAB - Area Code rules

In some places, some prefixes within an area code are considered local calls, and other prefixes within the same area code are considered long distance. Use this tab to specify those relationships and the rules for dialing those numbers.

In the New Area Code Rule dialog box, specify how certain phone numbers in the same or other area codes need to be dialed. Include all the prefixes to be used for this area code.

- Leave the field Dial empty
- Check: *Include the area code*.



CTI Data Connector for Salesforce supports the dialing rules only, if Country/Region is set to United States or Canada.

See also

[Where do I find this screen?](#) ⁷¹

6.5.2 Configuration Caller Identification

Configuration Wizard

Step 2 of 6
Specify the specific settings of the PBX and the configuration for caller identification.

PBX Configuration **Configuration Caller Identification**

Caller identification - truncate number of digits:

☒ Complete database search in the defined sequence
☐ After truncating a digit restart search in all databases

☐ Don't show internal calls
☐ Use Called ID for caller identification
☒ Suppress multiple hits due to identical phone numbers
☐ Display Caller ID Name identified by PBX

String if Caller ID is suppressed:

Display Phone Number:

☒ Display number sent by TAPI-driver without any change
☐ Display number in international format

Caller identification - truncate number of digits

CTI Data Connector for Salesforce can truncate a phone number until a phone number with a direct match is found.

Example

Incoming number: 0044734273**833**. This number is not associated with a contact person, but the number of the main office with 0044734273-0 is stored. After 3 digits having been truncated, the number of the main office will be found. If this logic is not needed, type in 0. The default value is 3.

US or Canada

This option must be 0 because extensions can not be dialled directly.

Options

- *Complete database search in the defined sequence.* If the phone number is NOT found then the phone number is truncated and the search is done again in the **same**

database. If after truncating of the digits no caller ID is found, then the next database is used to search for the phone number

- *After truncating a digit restart search in all databases.* If the phone number is NOT found, the phone number is searched in the **next** database. After searching in all databases the phone number is truncated and the search starts with database 1 again



This option is not used for salesforce

Don't show internal calls

If selected, the caller information for **internal calls will not be displayed**. For distinguishing between internal and external calls, the value in the field [Minimum length of phone number indicating an external call](#) will be used.

Use Called ID for caller identification

By default, the phone number of the person who is calling (CallerID) is used for caller identification. If the number that was called (Called ID) is to be used, select this option.

Example

You provide a phone service for 10 companies and you offer a line for each company. Whenever a phone comes in, the number that was called (line for company 1 to 10) including the company name is to be displayed.

Suppress multiple hits due to identical phone numbers

If records are stored multiple times (the same phone number is stored multiple times), CTI Data Connector for Salesforce will always display multiple addresses and cannot open a caller record or Outlook contact. If the option *Suppress multiple hits due to identical phone numbers* is selected, always only one suitable record will be displayed.



This option is not used for salesforce

Display Caller ID identified by PBX

If your PBX has an own phone directory, CTI Data Connector for Salesforce can display the name of the caller in the Desktop Notification passed by the PBX, if no address is found in a database or Outlook.

The option: *String if caller ID is suppressed* should be the character string which is sent by the PBX for suppressed caller IDs, e.g. ***. Instead of displaying *** the Desktop Notification is not displayed.



This option is not used for salesforce

Display Phone Number

Defines the format how the phone number is displayed in the call history or in the desktop notification

- *Display number sent by TAPI driver without any change.* The phone number is formatted like in the display of the telephone set (depending on the TAPI driver) - e.g. 214.415.9160
- *Display number in international format.* The phone number is displayed in the international format - 0012144159160

See also

[Where do I find this screen?](#) 

Part



7 Service Programmes

7.1 Show License Information

To display the license information, either

- right click on the icon in the [taskbar](#)^[22] - select **Show License Information**

or

- select within the [Control Centre](#)^[24], Menu **Extras**, **Show License Information**

This will open the Licence Viewer where you can view the licenses you have acquired, the number of users/computers who can use the licence and whether a licence has a time limitation or not.

Number of licenses

The folder **CTI License** displays the maximum number of licenses and the number of licenses which are available. If you click on the + sign, all computers using a license will be displayed. See [Deactivate a License](#)^[157] how to deactivate one single computer.

- Number of Computers / PCs which have a license
- [Demoversion](#)^[154] - if omitted it is a full version or time-limited full version
- Valid until (time limitation) - if omitted it is a non time-limited version
- [Web Activation](#)^[128] - either done or required

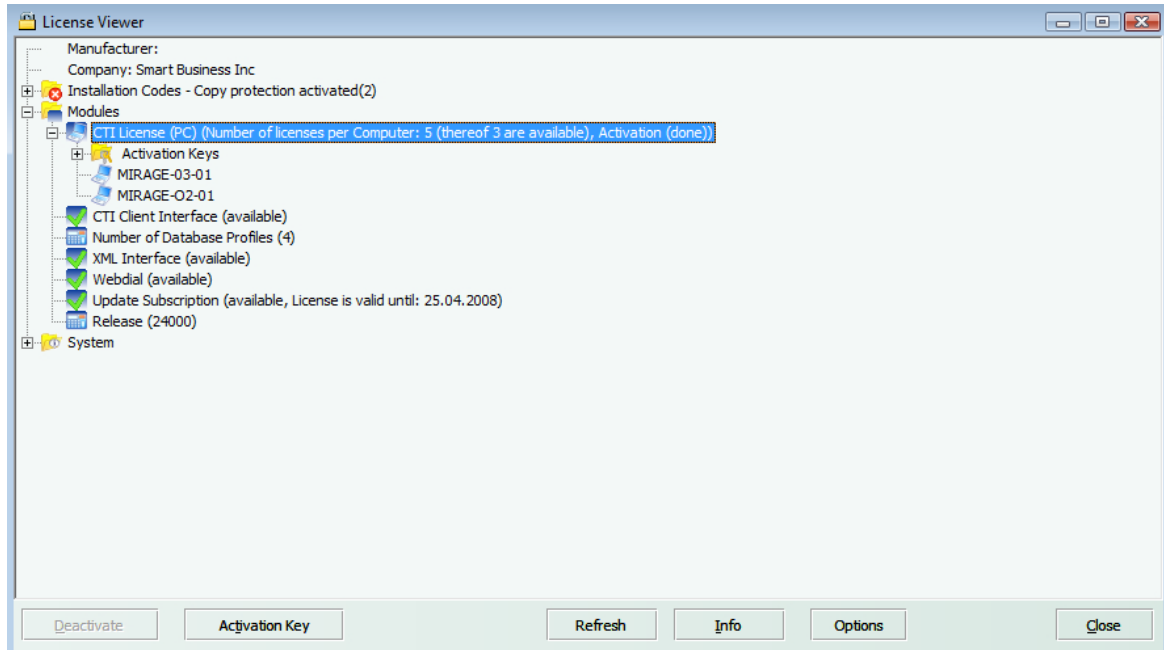
Update Subscription

The update subscription entitles you to install the latest updates as long as it has not expired. See chapter [software update](#)^[12] about how to download updates.

- Available / Not available
- Time limitation - the date when the update subscription expires

Release Number

- Internal release information



7.2 Apply Activation Key

An Activation Key is used to modify the license information (e.g. increase number of licenses). All Activation Keys are unique and have the same format like:

fZDdq-aDC95-e54DA-atR82-DL82k-NfC4v

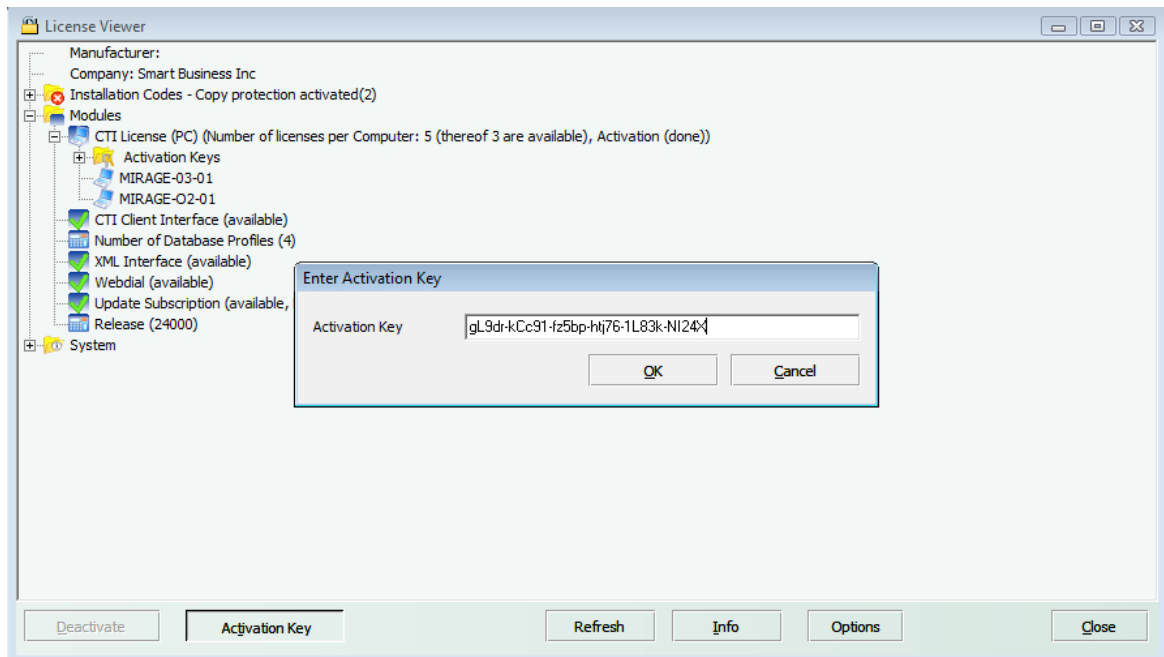
There are 6 blocks each with 5 characters. The blocks are separated by a hyphen for better readability.

If you got an Activation Key via E-Mail or Fax, you can enter the key within the screen [Show License Information](#)⁸⁰⁾.

- Start screen [Show License Information](#)⁸⁰⁾
- Select button *Activation Key*
- Paste the key from the clipboard with CTRL+V



It is possible to validate the Activation Key online. In this case an Internet connection is necessary.



7.3 Formatting of Phone Numbers

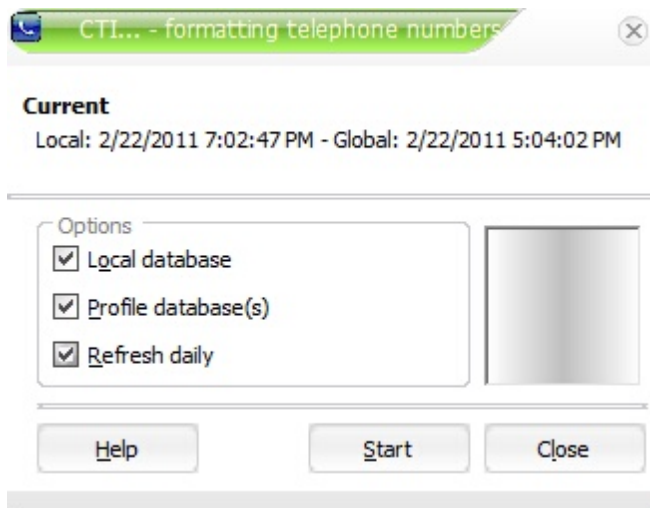
As the phone numbers stored in different formats in the enterprise databases cannot be used for the [caller identification](#)^[40], they have to be converted cyclically into an international format.

This program normally runs on the server 1 or 2 times a day and formats all phone numbers of all enterprise databases (profile databases). See [Server Setup](#).^[83]

The local database (Quick dialing list and contact data from Microsoft Outlook™) and also the main database in a single user environment has to be formatted on the local PC. This is automatically done once a day after <%oemtitle%> has been started, if the option *Refresh daily* is selected. During the formatting of the phone numbers you can make calls, but the caller identification will not be active.

Start the program for formatting the phone numbers by clicking on the icon in the [taskbar](#)^[22] with the right mouse button and select the option **Format phone numbers** or by selecting the menu Extras - **Format phone numbers** in the [control centre](#)^[24].

Depending on the installation some options might be disabled.



If you do not want to run the program every day, deselect *Refresh daily* and run the program from time to time by pressing the button *Start*.




A single user installation does not support formatting phone numbers on the server, and all databases will have to be formatted locally.

7.4 Format Phone Numbers on the Server

This step has to be done on the server

A Server Setup is necessary to [format](#)^[82] the phone numbers of enterprise databases. When using Microsoft Outlook™ the formatting is done on the local PC.

The CTI Data Connector for Salesforce component has to be installed on the **server** with

the program **SetupServer.exe**. Start the program `setupserver.exe` on the  **server** (never on the workstation). This installs all necessary components and creates a program group *CTI Data Connector for Salesforce* with the entry **CTI Data Connector for Salesforce Format Phone Numbers**. Start this program to format the phone numbers manually in order to check if it is working.

You can start a cyclical formatting of phone numbers on the server. We recommend doing this during the night. Ideally you use the Task manager of the server operating system (Control Panel, Scheduled Tasks). To start the task use the following command:

cdcsfeSTARTER.EXE -R

Alternatively you can use the timer function of CTI Data Connector for Salesforce. The applications will reside in the memory of the server, while the memory is freed, if the windows task manager is used.

Possible Parameters

- R: The program starts, formats the phone numbers and terminates
- Thh:mm: Starts as a "Server". The phone numbers are formatted at the specified time (e.g.: -T08:00 = 8 o'clock)
- Mn: Starts as a "Server". The phone numbers are formatted after the specified time interval (e.g.: M180 = 180 minutes)

See also

[Network Installation - general information](#) ¹⁰⁰
[Formatting of Phone Numbers](#) ⁸²

7.5 Error Protocol

In case of failing to access a database an error protocol will be written. You can display it by clicking on the icon in the [taskbar](#) ²² with the right mouse button and selecting the option **Error protocol** or selecting the menu **Extras - error protocol** in the [control centre](#) ²⁴.

The error protocol will be deleted with every start of CTI Data Connector for Salesforce.

There is a log file for error tracking with the TAPI device driver - see [configuration settings](#) ⁶⁴.

7.6 Phone Simulator

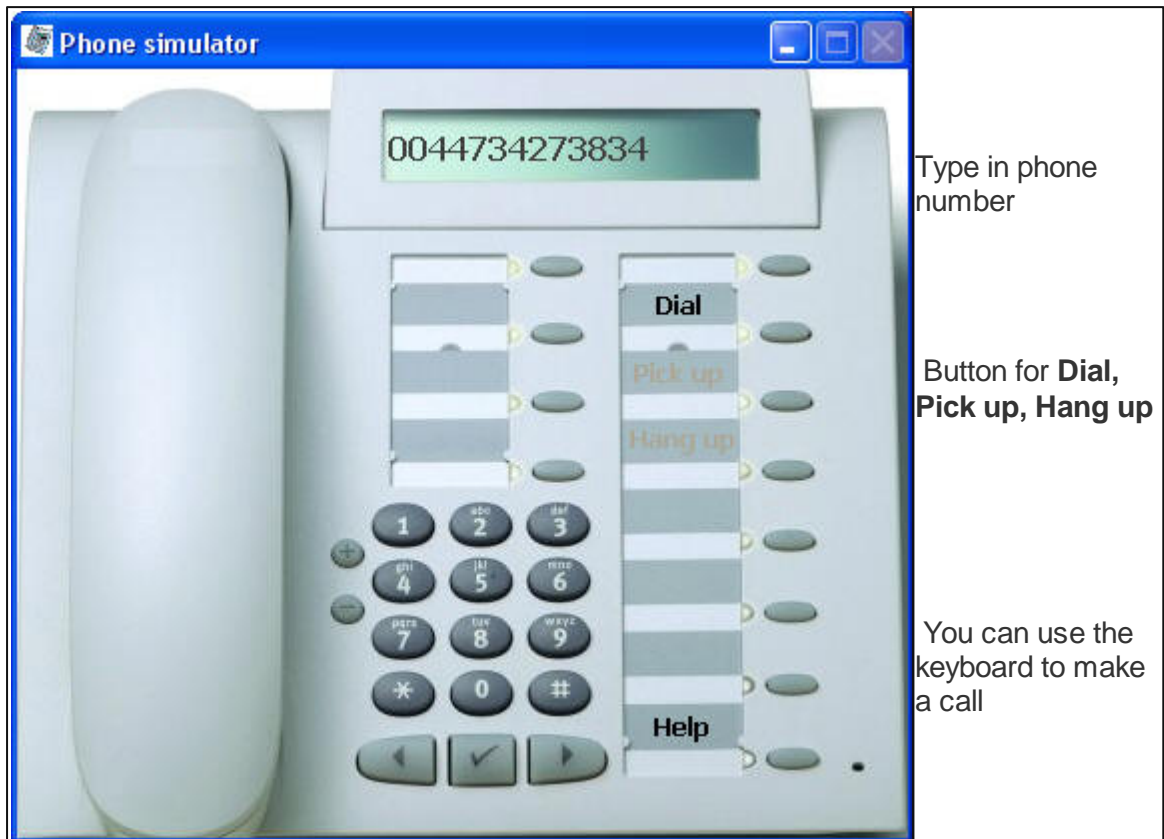
If you have no TAPI-enabled phone available and you want to test CTI Data Connector for Salesforce, you can use the simulator which works like a regular telephone.

Activating the Simulator

Start the [Configuration Wizard](#) ⁵³ and choose the page where you can select your [telephony service provider](#) ⁵⁵. Choose **<Telephone Simulator>**. When you start CTI Data Connector for Salesforce, the simulator will be started automatically.

Working with the Simulator

The telephone simulator acts like a normal telephone with which you can make outgoing calls and accept incoming calls.



Type in phone number

Button for **Dial**,
Pick up, **Hang up**

You can use the keyboard to make a call

Simulating an incoming call

- Type in a phone number (without country code and special characters) in the display. You can alternatively use the keyboard to type in the number.
- Press the button **Dial**
- CTI Data Connector for Salesforce performs the caller identification and signals the incoming call
- Accept the incoming call by pressing the button **Pick up**
- You can disconnect the call by pressing the button **Hang up**

Simulating an outgoing call

- Search in the phone book of CTI Data Connector for Salesforce for an address or a contact person and dial by double-clicking on the phone number. You can dial alternatively by [highlighting a phone number](#)^[34] and pressing the configured [Hotkey](#)^[58].
- CTI Data Connector for Salesforce displays the dialled address
- Establish the call by pressing the button **Pick up**

- You can disconnect the call by pressing the button **Hang up**

Part



8 Installation

CTI Data Connector for Salesforce supports [single user](#)^[88] and [network installation](#)^[100]. The network installation offers a centralized handling of the configuration settings, updates and license information.

A network installation is recommended with more than 3 PCs.

- [Single User Installation](#)^[88]
- [Network Installation](#)^[100]
- [Activate Product](#)^[128]
- [Installation FAQ](#)^[141]

8.1 Single User Installation

The installation consists of 5 steps:

- [Install call center adapter](#)^[89]
- [Install the application on the local PC](#)^[97]
- [Minimum Configuration Settings](#)^[21]
- [Browser Support](#)^[99]
- [Activate Product](#)^[128]

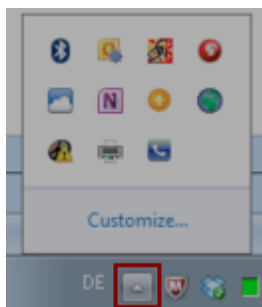


Each PC needs a [Serial Number](#)^[131] to activate the software

By default, the icon is not visible on Vista and Windows 7 in the notification area. To show



the icon for CTI Data Connector for Salesforce in the system tray, click on the up arrow. Click on **Customize**.



This will open the Notification Area Icons control panel item. Select the icon for CTI Data Connector for Salesforce and in the pick list select: **Show icon and notification**.



Additionally add the red salesforce icon 

8.1.1 Install Call Center Adapter

To install and activate the call center adapter the following steps are necessary.

1. System Requirements regarding Salesforce

To use the Call Center Adapter, the *Professional*, *Enterprise*, *Developer* or *Unlimited Edition* is required.

If you want to test version 4 (supports Safari, Firefox and Chrome), contact Support@mirage-systems.de to retrieve a beta version.

If you are using the *Team Edition*, contact Support@mirage-systems.de for an alternative solution.

- ☐ System Requirements regarding PBX and operating system

Telephone System

To communicate with a phone system, either a CTI server (Third Party Solution) or the connection of the phone set to the PC (First Party Solution) is supported. For both systems a **TAPI driver 2.x (also referred to as TSP)** is mandatory. See details for TAPI - [Where do I find the TAPI driver?](#) ¹⁴²

If you are using a modem, we strongly recommend switching to a phone set connected to the PC (via USB/serial), because the TAPI drivers of modems often do offer only basic functions or do not function at all.

ISDN phones without a PBX are available with an inbuilt TAPI driver.

VOIP systems like Cisco Call Manager, Avaya, Swyx or Innovaphone normally have a TAPI driver included.

Some SIP phones offer TAPI support, e.g. Global IP Telecommunications Ltd (Ninja) www.globalipphones.com

Please check firstly with your phone vendor about which solution meets your requirements and how you can install and configure the TAPI driver. You can contact Support@mirage-systems.de if you do have the TAPI driver installed and CTI Data Connector for Salesforce has problems with making an outgoing call or receiving incoming calls.

Operating System

Windows XP to Windows 7 (32bit and 64 bit) is supported. Every Windows System (especially XP) needs the latest service pack.

Some TAPI drivers do not work on **64bit operating** systems. You can use a virtual machine with 32bit operating system. An example, how this is working is explained for [MAC OS X](#).^[151] For Windows Vista or Windows 7 64bit, the same virtual machines can be used.

Salesforce

The Salesforce *Professional*, *Enterprise*, *Unlimited* or *Developer Edition* is required for the call center functionality. If you are using the *Team Edition*, contact Support@mirage-systems.de for an alternative solution.

See also

[Configure](#)^[56] the TAPI driver within CTI Data Connector for Salesforce
[Where do I find the TAPI driver?](#)^[142]

2. Download the adapter configuration file

Download the file [adapter.xml](#) (right mouse click, save target as) and save it on your hard disk.

3. Add the configuration file to salesforce

Select: *Setup > AppSetup > Customize > Call Center > Call Centers*

Click on the button: **Import** and select the file **adapter.xml** on your local hard disk

Browser for adapter.xml

CTI Data Connector - Call Center Adapter will be added to the call center list

Action	Name	Version	Created Date	Last Modified Date
Edit Del	CTI Data Connector - Call Center Adapter	3.000	04.04.2011 14:07	04.04.2011 14:07

call center list

4. Configure the call center adapter

Click on the call center adapter.

Note

If you make any changes of the configuration settings you have to logout in salesforce, right click on the blue CTI Data Connector icon and select: *Reload Salesforce Configuration*

Dialing Options

The *dialing options* configuration depends on the PBX and on the country your are located.

CTI Data Connector - Call Center Adapter Version 3

All Call Centers » CTI Data Connector - Call Center Adapter Version 3

Call Center Detail [Edit] [Delete] [Clone]

General Information	
Internal Name	CDCSFE
Display Name	CTI Data Connector - Call Center Adapter Version 3
Description	Integration in salesforce call center adapter for CTI Data Connector
CTI Connector Progid	CDCSFEAdapter.CDCSFEAdapter.2
Version	3.0
Config Version	3.0.4
Dialing Options	
Outside Prefix	9
Long Distance Prefix	1
International Prefix	011
Country Code	1

*Configure call center
for USA*

CTI Data Connector - Call Center Adapter Version 3

All Call Centers » CTI Data Connector - Call Center Adapter Version 3

Call Center Detail

[Edit] [Delete] [Clone]

General Information

Internal Name	CDCSFE
Display Name	CTI Data Connector - Call Center Adapter Version 3
Description	Integration in salesforce call center adapter for CTI Data Connector
CTI Connector Progid	CDCSFEAdapter.CDCSFEAdapter.2
Version	3.0
Config Version	3.0.4

Dialing Options

Outside Prefix	0
Long Distance Prefix	0
International Prefix	00
Country Code	49

Configure call center for Europe or other countries

- *Outside Prefix* - (number to access an outside line) - e.g. in US **91** 407-398-6913 or in Europe it is often **0** 031976354
- *Long Distance Prefix* - Carrier Code to make a long distance call - e.g. in US **1** 407-398-6913, in Europe it is often **0** e.g. **031976354**
- *International Prefix* - Carrier Code to make an international call - e.g. in US **011** 497525529339 to make a call to Germany, in Europe it is often **00** e.g. **00497525529339**
- *Country Code* - Country code of your country - e.g. US is 1, Germany 49. [Click here for a list of all country codes](#)



You have to use an [own adapter](#) for each country where you have call center users.

Save call as a task

Each call (incoming and outgoing) can be **automatically saved** as a task / activity including the **call duration** and a **phone note**.

Save call as a task

Subject of the task	{calltype} {time}
Autosave incoming calls (Y/N)	Y
Autosave outgoing calls (Y/N)	Y
Autosave unsuccessful calls (Y/N)	Y

- *Subject of the task* - configure the subject line. Either use a text like CALL or one of the following variables

{calltype} - inserts either *Incoming Call* or *Outgoing Call*

{time} - inserts the time

{date} - inserts the current date

Activity History	
Action	Subject
Edit Del	Incoming Call 8:08 PM

- *Autosave incoming calls*: Y = Yes, N = No. Define if an incoming call should be automatically saved. If you type in a phone note the call is always saved
- *Autosave outgoing calls*: Y = Yes, N = No. Define if an outgoing call should be automatically saved. If you type in a phone note the call is always saved
- *Autosave unsuccessful calls*: Y = Yes, N = No. Define if an unsuccessful call = call duration with 0 seconds should be stored. If you type in a phone note the call is always saved

Call-Wrap-Up

To rate a phone call, you can activate the Call Wrap Up feature, which is displayed at the end of the phone call in the [SoftPhone](#)⁴³.

The options, which are available to rate a phone call, can be defined with Label 1 to 10.

Call Wrap Up	
Call Wrap Up Enabled (Y/N)	Y
Label 1	Send Quote
Value for report 1	Send Quote
Label 2	No interest in product
Value for report 2	No interest in product
Label 3	Include in campaign A
Value for report 3	Include in campaign A
Label 4	
Value for report 4	
Label 5	

This is how it will appear on the softphone.

The selected item is saved with the note as an activity using the text, which is defined as: **value for report**. You can either use the same text for the report as the label or use another value.

Example:

Label: Send Quote - Value for Report: *Send Quote*. The text **Send Quote** is saved for the report.

Label: Send Quote - Value for Report: *CODE-SQ*. The text **CODE-SQ** is saved for the report.

A different value for the report e.g. makes sense, if you configure adapters in different languages but you want to have the same result text in the report.

See also: [Reports](#) ⁵⁰



If you want to update fields depending on a phone call, create a workflow within salesforce and use the 3 call specific fields (*Call Type*, *Call Result*, *Call Duration*) described in [step 6](#) ⁹⁵ to trigger the workflow.

If you want to have **different options depending on user groups** (e.g. sales and support or you have locations in different countries) you can install multiple [Call Center Adapters](#) ⁹⁶.

5. Add users to the call center

Now click on the button: **Manage Call Center Users**

Call Center
CTI Data Connector - Call Center Adapter: Manage Users
All Call Centers > CTI Data Connector - Call Center Adapter > Manage Users

View: All ▾ Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Full Name ↑	Alias	Username	Role	Profile
No records to display.				

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

add call center users

Add the users who should use CTI Data Connector for Salesforce

6. Configure Softphone Layout

General Settings

The salesforce administrator can configure the user interface of the SoftPhone with the menu option: **Softphone-Layouts**. It allows you e.g. to define which fields should appear on the SoftPhone or general settings for the display of the call. The settings are valid for **all users**.



Not all functions, which can be configured here, are supported by CTI Data Connector for Salesforce.

User specific settings

Each user can configure **Personal** settings: *Setup > Personal Setup > Call Center Settings > My Softphone Settings*

7. Configure Task Page layout

All phone calls are saved as a task. To make some special phone fields like call duration accessible for the user, they can be added to the task page layout.

Select: *Setup > Customize > Activities > **Task Page Layouts***.

Add the fields:

- Call Type
- Call Result

- Call Duration

Highlights Panel

Customize the highlights panel for this page layout...

Task Detail

Standard Buttons: [Edit](#) [Delete](#) [Delete Series](#) [Create Follow Up Task](#) [Create Follow Up Event](#) Custom Buttons

Task Information (Header visible on edit only)

★ Assigned To	Sample User	★ Status	Sample Status
★ Subject	Sample Subject	• Name	Sample Contact
• Due Date	18.06.2011 15:01	• Related To	Sample Contract
📞 Phone	1-415-555-1212	📧 Email	sarah.sample@company.com
★ Priority	Sample Priority		

Phone Call

📞 Call Type	Sample Call Type	🕒 Call Duration	7.159
Call Result	Sample Call Result		

Troubleshooting

See: [Error - Call Center Adapter](#)¹⁴⁶



For more information about the salesforce *call center adapter* search in the salesforce online help using the search term: **call center adapter overview**

The integration in salesforce requires one of the following salesforce editions: *Professional, Enterprise, Unlimited* oder *Developer Edition*.

8.1.1.1 Install Multiple Call Center Adapters

If you want to have **different options depending on user groups** (e.g. sales and support or you have locations in different countries), you can install multiple Call Center Adapters.

The same applies to languages. The standard fields are automatically displayed in the user language. If you need to translate the **custom fields**, e.g. in the [Call Wrap Up](#)⁹³, just make an own adapter for each language.

Rename the adapter

Click on edit and rename the fields: *Internal Name* and *Display Name*.

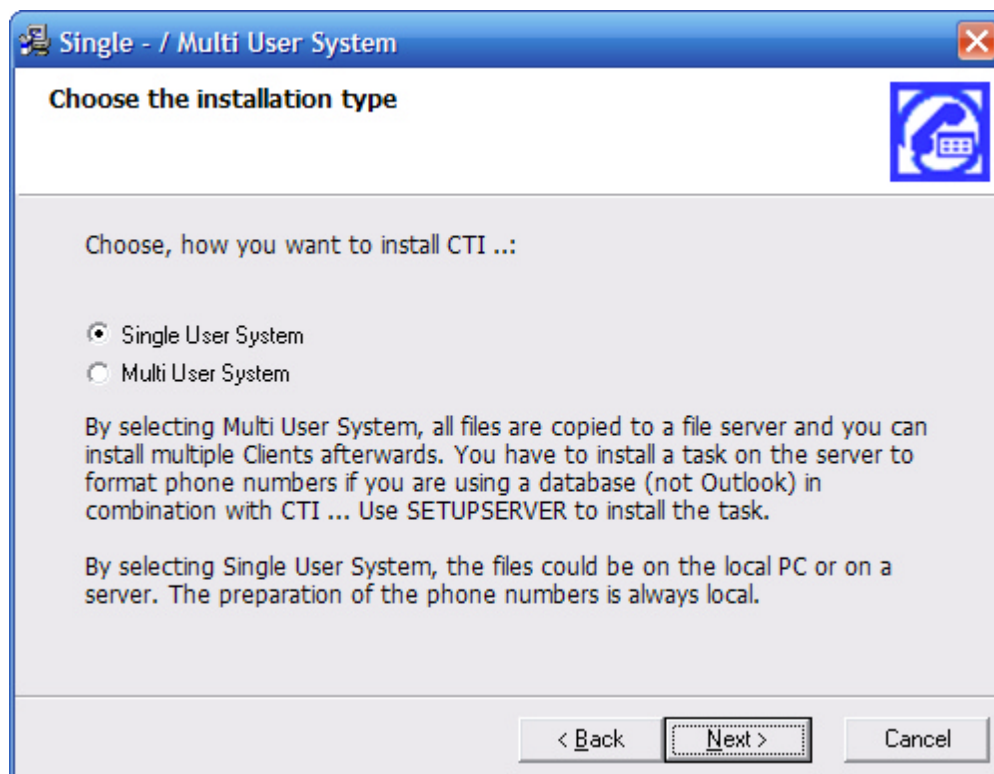
Call Center Detail		Edit	Delete	Clone
General Information				
Internal Name	CDCSFESales			
Display Name	CTI Data Connector - Call Center Adapter Version 3 - Sales			
Description	Integration in salesforce call center adapter for CTI Data Connector			

Import a new adapter

[Import a new adapter](#) and make different settings.

8.1.2 Install the application on the local PC

You can select during the installation whether you want to install a *Single User* or *Multi User system*. Select **Single User System**.



Necessary Rights

During installation DLLs are registered. The user who installs the application needs a right to register DLLs.

The user who runs the application needs the following rights on the installation folder:

- Files **cdcsfe.xml** and **cdcsfe.lic**: read and write access
- All other files: read access

See also

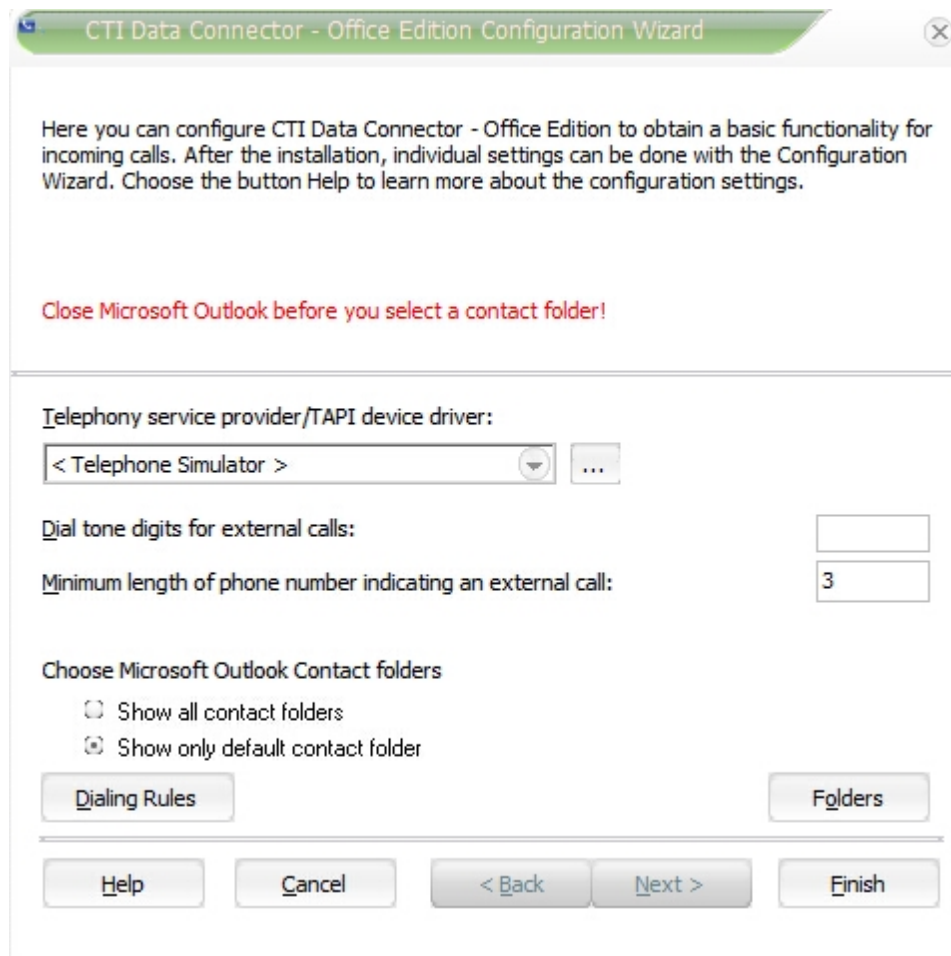
[Single User Installation - general information](#)^[88]

8.1.3 Minimum Configuration Settings

During installation, the [Configuration Wizard](#)^[53] was already started. You can define a lot of individual configuration settings there. The following settings **have to be defined** to guarantee a basic functionality.

- [TAPI device driver](#)^[56] - it is delivered by the telephone manufacturer. See also: [System requirements - TAPI driver](#)^[141]
- Prefix for [external calls](#)^[71] and the [minimum length](#)^[72] of a phone number indicating an external call
- Button [Dialing Rules](#)^[72] - configures country settings and area code. See also special [configuration for US / Canada](#)^[73]
- The option: *Show all contact folders* allows to use the public and private contact folders for caller identification. The option: *Show only default contact folder* displays only private contact folders.
- Button Folder - Select Microsoft Outlook™ contact folder for caller identification. You have to close Outlook before you can select the contact folders.

Just by setting this minimum configuration you will be able to make outgoing calls and to identify incoming calls. The Configuration Wizard can be started any time by **right** click on the [icon](#)^[22], option [Configuration Wizard](#)^[53].



See also

[Where do I find the TAPI driver?](#)¹⁴²
[System requirements - TAPI driver](#)¹⁴¹

8.1.4 Browser Support

The call center adapter works with:

- Internet Explorer 7 or 8. Internet Explorer 9 works but with limitations
- Firefox 3.5 and 3.6 - Version 4 and 5 is not supported

The support for Internet Explorer is installed automatically. For Firefox, you have to install

a plug-in.



The limitations are due to the salesforce Softphone. Check with the next salesforce release if new Browser versions are supported.

Install Firefox Plug-In

- Close Firefox
- Download the firefox plug-in installer - [Click here](#) (right mouse click, save target as)
- Save it into the **installation folder** of CTI Data Connector for Salesforce (e.g. ..program files\CTI Data Connector for Salesforce\3.0)
- Double-Click on **sf-firefox-plugin.exe**
- Firefox will open and a warning message appears. Click on the button: *Install now*

8.2 Network Installation

Perform the following steps for network installation.

- [Install call center adapter](#)⁸⁹
- [Copy all files to the server](#)¹⁰⁸
- [Workstation Setup](#)¹⁰⁹
- [Browser Support](#)⁹⁹
- [Distribute Client Setup](#)¹¹² to all PCs
- [Activate Product](#)¹²⁸



The network installation can be started from any workstation.

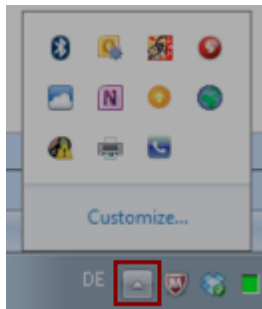


Only **one** Serial Number is needed. The Serial Number includes the number of PCs which can be installed.

By default, the icon is not visible on Vista and Windows 7 in the notification area. To show



the icon for CTI Data Connector for Salesforce in the system tray, click on the up arrow. Click on **Customize**.



This will open the Notification Area Icons control panel item. Select the icon for CTI Data Connector for Salesforce and in the pick list select: **Show icon and notification**.



Additionally add the red salesforce icon



8.2.1 Install Call Center Adapter

To install and activate the call center adapter the following steps are necessary.

1. System Requirements regarding Salesforce

To use the Call Center Adapter, the *Professional*, *Enterprise*, *Developer* or *Unlimited Edition* is required.

If you want to test version 4 (supports Safari, Firefox and Chrome), contact Support@mirage-systems.de to retrieve a beta version.

If you are using the *Team Edition*, contact Support@mirage-systems.de for an alternative solution.

- ☐ System Requirements regarding PBX and operating system

Telephone System

To communicate with a phone system, either a CTI server (Third Party Solution) or the connection of the phone set to the PC (First Party Solution) is supported. For both systems a **TAPI driver 2.x (also referred to as TSP)** is mandatory. See details for TAPI - [Where do I find the TAPI driver?](#)¹⁴²

If you are using a modem, we strongly recommend switching to a phone set connected to the PC (via USB/serial), because the TAPI drivers of modems often do offer only basic functions or do not function at all.

ISDN phones without a PBX are available with an inbuilt TAPI driver.

VOIP systems like Cisco Call Manager, Avaya, Swyx or Innovaphone normally have a TAPI driver included.

Some SIP phones offer TAPI support, e.g. Global IP Telecommunications Ltd (Ninja) www.globalipphones.com

Please check firstly with your phone vendor about which solution meets your requirements and how you can install and configure the TAPI driver. You can contact Support@mirage-systems.de if you do have the TAPI driver installed and CTI Data Connector for Salesforce has problems with making an outgoing call or receiving incoming calls.

Operating System

Windows XP to Windows 7 (32bit and 64 bit) is supported. Every Windows System (especially XP) needs the latest service pack.

Some TAPI drivers do not work on **64bit operating** systems. You can use a virtual machine with 32bit operating system. An example, how this is working is explained for [MAC OS X](#).^[151] For Windows Vista or Windows 7 64bit, the same virtual machines can be used.

Salesforce

The Salesforce *Professional*, *Enterprise*, *Unlimited* or *Developer Edition* is required for the call center functionality. If you are using the *Team Edition*, contact Support@mirage-systems.de for an alternative solution.

See also

[Configure](#)^[56] the TAPI driver within CTI Data Connector for Salesforce
[Where do I find the TAPI driver?](#)^[142]

2. Download the adapter configuration file

Download the file [adapter.xml](#) (right mouse click, save target as) and save it on your hard disk.

3. Add the configuration file to salesforce

Select: *Setup > AppSetup > Customize > Call Center > Call Centers*

Click on the button: **Import** and select the file **adapter.xml** on your local hard disk

Browser for adapter.xml

CTI Data Connector - Call Center Adapter will be added to the call center list

Action	Name	Version	Created Date	Last Modified Date
Edit Del	CTI Data Connector - Call Center Adapter	3.000	04.04.2011 14:07	04.04.2011 14:07

call center list

4. Configure the call center adapter

Click on the call center adapter.

Note

If you make any changes of the configuration settings you have to logout in salesforce, right click on the blue CTI Data Connector icon and select: *Reload Salesforce Configuration*

Dialing Options

The *dialing options* configuration depends on the PBX and on the country your are located.

CTI Data Connector - Call Center Adapter Version 3
All Call Centers » CTI Data Connector - Call Center Adapter Version 3

Call Center Detail [Edit](#) [Delete](#) [Clone](#)

General Information

Internal Name	CDCSFE
Display Name	CTI Data Connector - Call Center Adapter Version 3
Description	Integration in salesforce call center adapter for CTI Data Connector
CTI Connector Progid	CDCSFEAdapter.CDCSFEAdapter.2
Version	3.0
Config Version	3.0.4

Dialing Options

Outside Prefix	9
Long Distance Prefix	1
International Prefix	011
Country Code	1

*Configure call center
for USA*

CTI Data Connector - Call Center Adapter Version 3

All Call Centers » CTI Data Connector - Call Center Adapter Version 3

Call Center Detail

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

General Information

Internal Name	CDCSFE
Display Name	CTI Data Connector - Call Center Adapter Version 3
Description	Integration in salesforce call center adapter for CTI Data Connector
CTI Connector Progid	CDCSFEAdapter.CDCSFEAdapter.2
Version	3.0
Config Version	3.0.4

Dialing Options

Outside Prefix	0
Long Distance Prefix	0
International Prefix	00
Country Code	49

Configure call center for Europe or other countries

- **Outside Prefix** - (number to access an outside line) - e.g. in US **91** 407-398-6913 or in Europe it is often **0** 031976354
- **Long Distance Prefix** - Carrier Code to make a long distance call - e.g. in US **1** 407-398-6913, in Europe it is often **0** e.g. **031976354**
- **International Prefix** - Carrier Code to make an international call - e.g. in US **011** 497525529339 to make a call to Germany, in Europe it is often **00** e.g. **00497525529339**
- **Country Code** - Country code of your country - e.g. US is 1, Germany 49. [Click here for a list of all country codes](#)



You have to use an [own adapter](#) for each country where you have call center users.

Save call as a task

Each call (incoming and outgoing) can be **automatically saved** as a task / activity including the **call duration** and a **phone note**.

Save call as a task

Subject of the task	{calltype} {time}
Autosave incoming calls (Y/N)	Y
Autosave outgoing calls (Y/N)	Y
Autosave unsuccessful calls (Y/N)	Y

- **Subject of the task** - configure the subject line. Either use a text like CALL or one of the following variables

{calltype} - inserts either *Incoming Call* or *Outgoing Call*

{time} - inserts the time

{date} - inserts the current date

Activity History	
Action	Subject
Edit Del	Incoming Call 8:08 PM

- *Autosave incoming calls*: Y = Yes, N = No. Define if an incoming call should be automatically saved. If you type in a phone note the call is always saved
- *Autosave outgoing calls*: Y = Yes, N = No. Define if an outgoing call should be automatically saved. If you type in a phone note the call is always saved
- *Autosave unsuccessful calls*: Y = Yes, N = No. Define if an unsuccessful call = call duration with 0 seconds should be stored. If you type in a phone note the call is always saved

Call-Wrap-Up

To rate a phone call, you can activate the Call Wrap Up feature, which is displayed at the end of the phone call in the [SoftPhone](#)⁴³.

The options, which are available to rate a phone call, can be defined with Label 1 to 10.

Call Wrap Up	
Call Wrap Up Enabled (Y/N)	Y
Label 1	Send Quote
Value for report 1	Send Quote
Label 2	No interest in product
Value for report 2	No interest in product
Label 3	Include in campaign A
Value for report 3	Include in campaign A
Label 4	
Value for report 4	
Label 5	

This is how it will appear on the softphone.

The selected item is saved with the note as an activity using the text, which is defined as: **value for report**. You can either use the same text for the report as the label or use another value.

Example:

Label: Send Quote - Value for Report: *Send Quote*. The text **Send Quote** is saved for the report.

Label: Send Quote - Value for Report: *CODE-SQ*. The text **CODE-SQ** is saved for the report.

A different value for the report e.g. makes sense, if you configure adapters in different languages but you want to have the same result text in the report.

See also: [Reports](#) ⁵⁰



If you want to update fields depending on a phone call, create a workflow within salesforce and use the 3 call specific fields (*Call Type*, *Call Result*, *Call Duration*) described in [step 6](#) ⁹⁵ to trigger the workflow.

If you want to have **different options depending on user groups** (e.g. sales and support or you have locations in different countries) you can install multiple [Call Center Adapters](#) ⁹⁶.

5. Add users to the call center

Now click on the button: **Manage Call Center Users**

Call Center
CTI Data Connector - Call Center Adapter: Manage Users
All Call Centers > CTI Data Connector - Call Center Adapter > Manage Users

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Full Name ↑	Alias	Username	Role	Profile
No records to display.				

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

[add call center users](#)

Add the users who should use CTI Data Connector for Salesforce

6. Configure Softphone Layout

General Settings

The salesforce administrator can configure the user interface of the SoftPhone with the menu option: **Softphone-Layouts**. It allows you e.g. to define which fields should appear on the SoftPhone or general settings for the display of the call. The settings are valid for **all users**.



Not all functions, which can be configured here, are supported by CTI Data Connector for Salesforce.

User specific settings

Each user can configure **Personal** settings: *Setup > Personal Setup > Call Center Settings > My Softphone Settings*

7. Configure Task Page layout

All phone calls are saved as a task. To make some special phone fields like call duration accessible for the user, they can be added to the task page layout.

Select: *Setup > Customize > Activities > **Task Page Layouts***.

Add the fields:

- Call Type
- Call Result

- Call Duration

Highlights Panel

Customize the highlights panel for this page layout...

Task Detail

Standard Buttons: [Edit](#) [Delete](#) [Delete Series](#) [Create Follow Up Task](#) [Create Follow Up Event](#) Custom Buttons

Task Information (Header visible on edit only)

★ Assigned To	Sample User	★ Status	Sample Status
★ Subject	Sample Subject	★ Name	Sample Contact
★ Due Date	18.06.2011 15:01	★ Related To	Sample Contract
★ Phone	1-415-555-1212	★ Email	sarah.sample@company.com
★ Priority	Sample Priority		

Phone Call

★ Call Type	Sample Call Type	★ Call Duration	7.159
Call Result	Sample Call Result		

Troubleshooting

See: [Error - Call Center Adapter](#) ¹⁴⁶



For more information about the salesforce *call center adapter* search in the salesforce online help using the search term: **call center adapter overview**

The integration in salesforce requires one of the following salesforce editions: *Professional, Enterprise, Unlimited* oder *Developer Edition*.

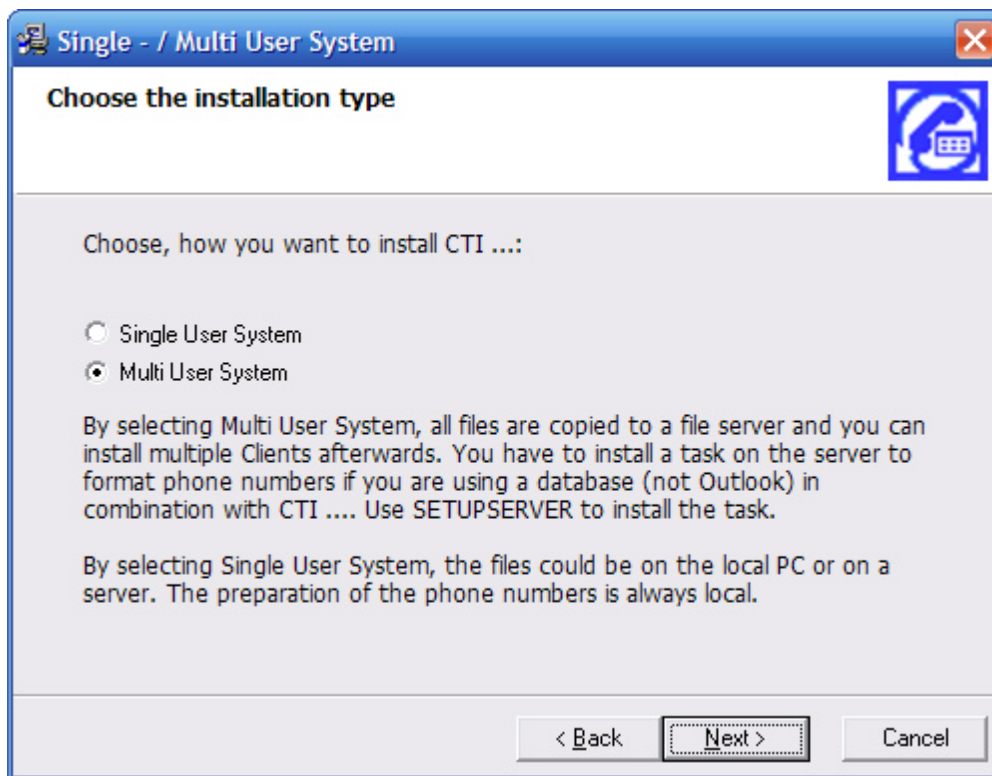
8.2.2 Copy all files to the server

Start the installation on the workstation and not on the server. The installation just copies files to the server.

You can select during the installation whether you want to install a *Single User* or *Multi User system*. Select **Multi User System** to for a network installation.

The setup just copies the files to the server. This allows having all files installed on one folder. Each workstation uses these files.

The installation can be started from any workstation.




You have to give **full read and write access for all users** to the installation folder.

See also

[Network Installation - general information](#) 

8.2.3 Workstation Setup

To install a workstation (client PC) perform the following steps:

- Open the file explorer on your **Workstation**
- Open the installation folder on the **server** - default folder is ...programs\CTI Data Connector for Salesforce
- Start **Setup.exe** on your **Workstation**
- [Make the Minimum Configuration Settings](#)  - use the **button Help** to get detail information about the configuration options

All settings which have been defined by the administrator are automatically applied. For

details see: [Distribute Client Setup](#) ¹¹².

Necessary Rights

During installation DLLs are registered. The user who installs the application needs a right to register DLLs.

The user who runs the application needs the following rights on the installation folder on the server:

- Files **cdcsfe.xml** and **cdcsfe.lic**: read and write access
- All other files: read access

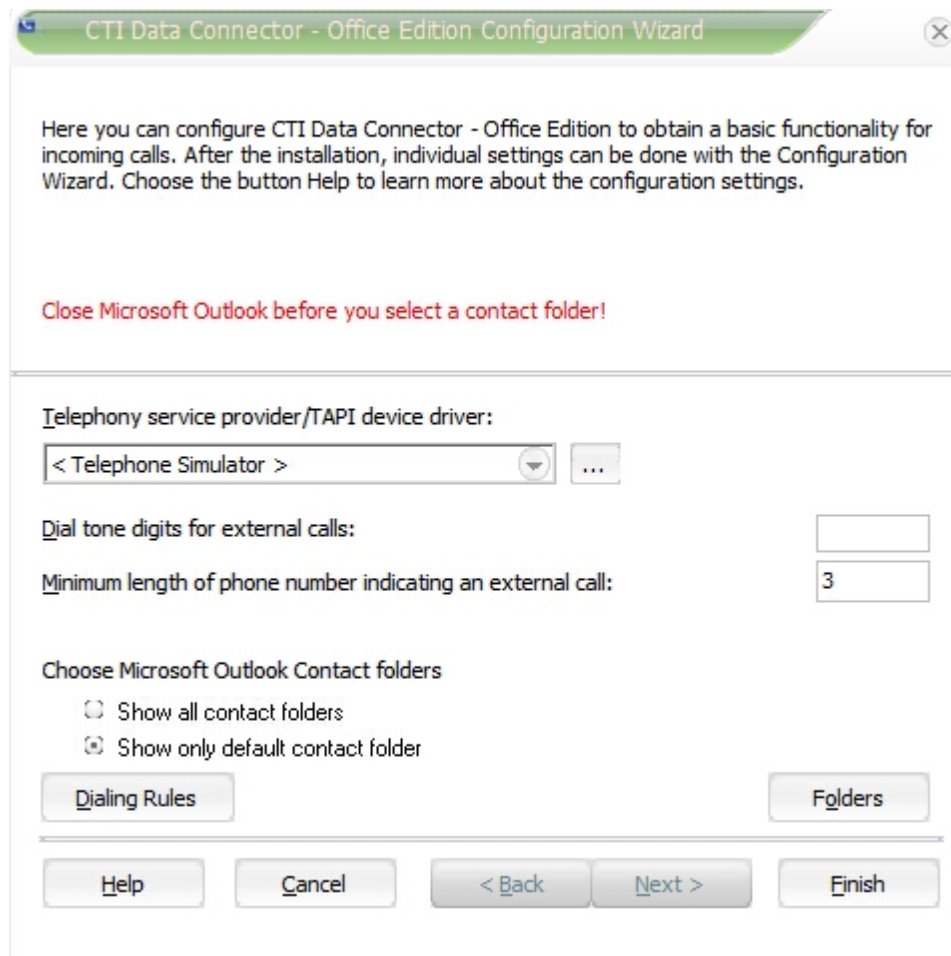


Each PC (not user) needs a [CTI license](#) ¹⁵⁴.

Silent Setup

CTI Data Connector for Salesforce supports a silent setup without any user interaction. Only at the end of the setup the user has to select his TAPI device driver and Microsoft Outlook™ contact folder.

Start the silent setup with: **setup.exe /S**

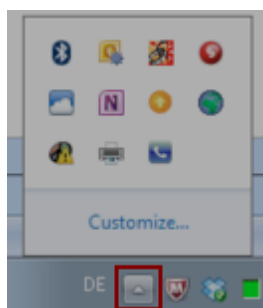


Icon in the System Tray

By default, the icon is not visible on Vista and Windows 7 in the notification area. To show



the icon for CTI Data Connector for Salesforce in the system tray, click on the up arrow. Click on **Customize**.



This will open the Notification Area Icons control panel item. Select the icon for CTI Data Connector for Salesforce and in the pick list select: **Show icon and notification**.



Additionally add the red salesforce icon



See also

[Network Installation - general information](#)

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8.2.4 Browser Support

The call center adapter works with:

- Internet Explorer 7 or 8. Internet Explorer 9 works but with limitations
- Firefox 3.5 and 3.6 - Version 4 and 5 is not supported

The support for Internet Explorer is installed automatically. For Firefox, you have to install a plug-in.



The limitations are due to the salesforce Softphone. Check with the next salesforce release if new Browser versions are supported.

Install Firefox Plug-In

- Close Firefox
- Download the firefox plug-in installer - [Click here](#) (right mouse click, save target as)
- Save it into the **installation folder** of CTI Data Connector for Salesforce (e.g. ..program files\CTI Data Connector for Salesforce\3.0)
- Double-Click on **sf-firefox-plugin.exe**
- Firefox will open and a warning message appears. Click on the button: *Install now*

8.2.5 Distribute Client Setup

It is possible to export the configuration settings of one PC and distribute it to all PCs. We recommend the following procedure:

- Install one Client

- Go through all configuration settings using the [Configuration Wizard](#)^{53]}
- Test outgoing and incoming calls
- If everything is working fine, export the settings of this PC

Export the configuration settings

- Open the installation folder on the server - default folder is ...programs\CTI Data Connector for Salesforce
- **Quit** CTI Data Connector for Salesforce
- Start the program - **Exportconfiguration.exe**. This will create a file **cdcsfeconf.bak** on the installation folder with all the settings of this PC. You can now delete settings if you do not want to export all settings
- Copy now **cdcsfeconf.bak** to **cdcsfeconf.dat**
- When a Client starts CTI Data Connector for Salesforce, it will automatically apply the settings reading the file **cdcsfeconf.dat**



All personal settings of all workstations will be overwritten.

How is this feature working?

The file *cdcsfeconf.dat* is a text file and consists of 2 sections:

- **[ClientConfigExt]** which has a copy of all settings of the PC
- **[ClientConfig]** which has a version number

During each program start, the file *cdcsfeconf.dat* is read. It is checked whether the version number stored in the registry of the PC is smaller than the version number stored in the section **[ClientConfig]**. If yes, the settings of the *cdcsfeconf.dat* will be applied and the version number will be updated in the local registry. This ensures that the Client PC can configure personal settings afterwards.

[ClientConfigExt]

DailyRefresh=0

Language=2000

.....

[ClientConfig]

Version=200610251440

You find a detail description of each criteria in the following chapter *cdcsfeconfig.dat* - node **[ClientConfigExt]** and *cdcsfeconfig.dat* - node **[ClientConfig]**

See also

[Network Installation - general information](#) 

8.2.5.1 cdcseconfig.dat - node [ClientConfigExt]

Enter topic text here.

8.2.5.1.1 CallerIDOwnerTel

Enter topic text here.

8.2.5.1.2 CallToEXE

Defines the executable which is used by Windows **callto:** command - see configuration Application to dial with Hyperlink and Dial with a Hyperlink.

Value range

Any executable name

Default value: Dial.exe

8.2.5.1.3 ClipboardWaitTime

Time how long the Hotkey function waits until the clipboard is accessed. The time is given in a thousandth part of a second - see configuration Hotkey Settings

Value range

1-98

Default value: 10 (hundredth part of a second)

8.2.5.1.4 DailyRefresh

Only active in **single user** installation environment. Defines, if the formatting of the phone numbers is done daily or not.

Value range

0 = false

1 = true

Default value: 0

8.2.5.1.5 DialDirectory

8.2.5.1.6 DialViaFile

Enables to option to dial via an XML file. See configuration, Configuration for special system requirements.

Value range

0 = false

1 = true

Default value: 0

8.2.5.1.7 DisplayCallerIDPBX

Option to use the name stored in a PBX directory or local phone for caller identification if supported by the TAPI driver - see configuration Display CallerID identified by PBX.

Value range

0 = No

1 = Yes

Default value: 0

See also

[EmptyCallerIDPBX](#)  116

8.2.5.1.8 DontRemoveCallWhenNumChanged

If a phone number changes during a call (e.g. because the call was redirected from the main switchboard) then the new phone number is updated by default in the Desktop Notification. The update can be suppressed by checking this option - see configuration Don't signal updated phone number during a call

Value range

0 = No

1 = Yes

Default value: 0

8.2.5.1.9 DontShow Internal

Configuration setting to signal internal calls or not. See configuration, Configuration caller identification.

Value range

0 = No - displays internal calls

1 = Yes - does not display internal calls

Default value: 0

8.2.5.1.10 DontSignalMissedCalls

Allows to **disable** the function, that a red icon is displayed, if a call is missed

Value range

0 = Red Icon is displayed, if a call is missed

1 = Red Icon is not displayed

Default value: 0

8.2.5.1.11 EmptyCallerIDPBX

String character string, which is sent by the PBX for suppressed caller IDs, e.g. ***. Instead of displaying *** the Desktop Notification is not displayed - see configuration String if Caller ID is suppressed.

Value range

Any character

Default value: Empty

See also

[DisplayCallerIDPBX](#)  116

8.2.5.1.12 ExchangePWD

Encrypted password if an Exchange profile is configured - see configuration, Configure Microsoft Outlook / Exchange.

8.2.5.1.13 ExchangeUID

UID for Profile, if an Exchange profile is configured - see configuration, Configure Microsoft Outlook / Exchange.

8.2.5.1.14 ExternalDigit

Dial tone digits for an external call - see configuration, PBX Configuration.

Default value: Empty

8.2.5.1.15 ExternalMinLen

Minimum length of phone number indication an external call - see configuration, PBX Configuration.

Default value: Empty

8.2.5.1.16 FadelInbound

Enable / Disable Desktop Notification window for **incoming calls**. See configuration, Configuration Call Notification.

Value range

0 = false

1 = true

Default value: 1

8.2.5.1.17 FadelIntens

Regulates the transparency of the Desktop Notification. See configuration, Configuration Call Notification.

Value range

0-255

Default value: 180

8.2.5.1.18 FadeOutbound

Enable / Disable Desktop Notification window for **outgoing calls**. See configuration, Configuration Call Notification.

Value range

0 = false

1 = true

Default value: 1

8.2.5.1.19 FadeTime

Duration in seconds for Desktop Notification. See configuration, Configuration Call Notification.

Value range

0 -99

Default value: 10

8.2.5.1.20 FindLikeChecks

Caller identification - truncate number of digits. See configuration, Configuration caller identification.

Value range

0 - 4

Default value: 3

8.2.5.1.21 FormatNumbers

8.2.5.1.22 HelpType

Define the type of help (online or offline) - see Help and Welcome

Value range

0 = Online

1 = Offline

Default value: 0

8.2.5.1.23 HotKey

Hotkey in coded Format. See configuration, Configure Hotkey.

Value range

see configuration screen

Default value: 121 (F10)

8.2.5.1.24 HotKeyEnabled

Enable / Disable the use of an Hotkey. See configuration, Activate Dialing via Hotkey.

Value range

0 = false

1 = true

Default value: 1

8.2.5.1.25 HotKeyModifier

8.2.5.1.26 Iconwithoutclient

This feature can only be use with the Development SDK.

8.2.5.1.27 IncomingCutPostfix

This option is needed with IP phones and a TAPI driver, which passes the phone number with IP information. See configuration - Truncate incoming phone number at

Value range

Any character

Default value: Empty

8.2.5.1.28 InternalNumberPrefix

Prefix for internal number - see TAPI configuration

Default value: Empty

8.2.5.1.29 IPProviderPostfix

Postfix which is added at the end of a phone number for outgoing calls - see TAPI configuration

Default value: Empty

8.2.5.1.30 Language

A lot of configuration settings can be made language specific. A language identifier (number) is used to specify a language.

Value range

1000 = German

2000 = English

4000 = Italian

Default value: 2000

The language can be configured by each user in the Configuration Wizard, introduction screen.

8.2.5.1.31 LastsForceSession

8.2.5.1.32 LastsForceUrl

8.2.5.1.33 LastUser

This feature can only be use with the Development SDK.

8.2.5.1.34 ListEntries

Number of entries in Call History and Redialing list. See configuration, Miscellaneous Settings.

Value range

0 - 1000

Default value: 500

8.2.5.1.35 LogTapi

Enable / Disable call logging . See configuration, TAPI configuration

Value range

0 = false

1 = true

Default value: 1

8.2.5.1.36 NoPermanentConnect

Disable permanent connection to an Access database - see configuration Miscellaneous Settings

Value range

0 = No

1 = Yes

Default value: 0



Never use this option on the server

8.2.5.1.37 OpenOutlookContact

Enable / Disable to open an Outlook contact if the caller data is stored in MS-Outlook .
See configuration, Configure Microsoft Outlook / Exchange.

Value range

0 = false

1 = true

Default value: 1

8.2.5.1.38 PresetIn

Enter topic text here.

8.2.5.1.39 PresetMode

Enter topic text here.

8.2.5.1.40 PresetOut

Enter topic text here.

8.2.5.1.41 RaiseNumberChangedEvents

Using this option would signal in the calls.xml file, if the phone number has changed during a call - see configuration - development API.

Value range

0 = No

1 = Yes

Default value: 1

8.2.5.1.42 RegisterRequest

Handle calls from Windows dialer - see Controlling CTI Application

Value range

0 = No

1 = Yes

Default value: 1

8.2.5.1.43 SaveCallOnlyOnce

If yes, the calls.xml is created only once per call. Otherwise the file is created for each TAPI event like ring, hold, terminate - see configuration development API.

Value range

0 = No

1 = Yes

Default value: 1

8.2.5.1.44 SaveJobOnlyOnce

If checked, the jobs.xml is created only once per call. Otherwise the file is created each time the Save button is pressed - see configuration development API.

Value range

0 = No

1 = Yes

Default value: 1

8.2.5.1.45 SetupTransferTimeout

This switch is used by the ActiveX integration option in the case a call is transferred. It is a wait time in seconds until the PBX responds to the event. The default value is 5 seconds, maximum is 60 seconds - see configuration Timeout during initializing a call transfer

Value range

1-60 (seconds)

Default value: 5

8.2.5.1.46 sforce.Data Source

Enter topic text here.

8.2.5.1.47 sforce.Jet OLEDB:Database Password

Enter topic text here.

8.2.5.1.48 sforce.Jet OLEDB:System Database

Enter topic text here.

8.2.5.1.49 sforce.Provider

Enter topic text here.

8.2.5.1.50 SFORCE.PWD

Enter topic text here.

8.2.5.1.51 SFORCE.UID

Enter topic text here.

8.2.5.1.52 sforcePassword

Enter topic text here.

8.2.5.1.53 sforceUser

Enter topic text here.

8.2.5.1.54 Show Confirm

Enter topic text here.

8.2.5.1.55 Show Inbound

Enter topic text here.

8.2.5.1.56 Show InboundMode

Enter topic text here.

8.2.5.1.57 Show Intro

Enter topic text here.

8.2.5.1.58 Show Outbound

Enter topic text here.

8.2.5.1.59 Show OutboundMode

Enter topic text here.

8.2.5.1.60 Show QuickStart

Display Welcome Screen - see Help and Welcome

Value range

0 = No

1 = Yes

Default value: 1

8.2.5.1.61 Simulate

Enter topic text here.

8.2.5.1.62 SuppMultiHits

Enter topic text here.

8.2.5.1.63 SwitchExtension

Enter topic text here.

8.2.5.1.64 TAPIDriverFakeNumber

A fake number which is ignored for outgoing calls - see TAPI configuration

Default value: Empty

8.2.5.1.65 TapiLine

Enter topic text here.

8.2.5.1.66 TapiLineName

Enter topic text here.

8.2.5.1.67 TSTapi

Defines, if a TAPI.DLL for Terminal server is used - see configuration - development API

Value range

0 = No

1 = Yes

Default value: 0

8.2.5.1.68 UseCallTo

Enter topic text here.

8.2.5.1.69 WebDial

Enter topic text here.

8.2.5.1.70 Window sDialer

Enter topic text here.

8.2.5.1.71 WizWasStarted

Enter topic text here.

8.2.5.1.72 WriteXMLAlways

Used when communication to an external program using calls.xml. Always write this file even if the user does not click on the Desktop Notification window - see development API

Value range

0 = No

1 = Yes

Default value: 0

8.2.5.1.73 XMLDirectory

Enter topic text here.

8.2.5.1.74 XMLEncoding

Enter topic text here.

8.2.5.2 cdcseconfig.dat - node [ClientConfig]

8.2.5.2.1 Version

Enter topic text here.

8.2.5.2.2 MaxVersion

Enter topic text here.

8.3 Citrix / Terminal Server

First check, if your TAPI server is approved for Citrix / Terminal Server usage. You then do not need additional licenses for CTI Data Connector for Salesforce. If the TAPI driver is installed on the local PC (telephone handset is directly connected to the PC) and CTI Data Connector for Salesforce is running on the Citrix / Terminal Server, then the **Terminal Server / Citrix Server Add-On** for CTI Data Connector for Salesforce is necessary. This allows the local TAPI driver to communicate with the application on the Citrix / Terminal Server.

Installation with TAPI driver installed on Terminal Server

Proceed as explained in the [network installation](#) ¹⁰⁰ chapter. During the [Workstation Setup](#) ¹⁰⁹, select in the program manager dialogue: **Install CTI Data Connector for Salesforce for all users.**

If the TAPI server is Citrix / Terminal server approved, every user can select a TAPI driver for his phone.

Installation with TAPI driver installed on the local PC (Terminal Server Add-On required)

Some TAPI drivers don't work on a Terminal Server (e.g. there is no 64bit TAPI driver or the driver is not Terminal Server compliant). Having this situation you can install the TAPI driver on the **local PC**. The installation process requires an additional setup and the license for the Terminal Server Add-On.

- [Install files on Terminal Server](#)^[126]
- [Install files on the local PC](#)^[126]



A Citrix Server Add-On will be available shortly. Please contact Support@mirage-systems.de for more information.

8.3.1 Install files on Terminal Server

Step 1

Before you can start with the Terminal Server Add-On installation, install the basic CTI Data Connector for Salesforce on the Terminal Server - Details see [Network Installation](#)^[100].

During the [Workstation Setup](#)^[109] select the TAPI driver **<Terminal Server Installation >**.

The next step is to install the necessary files on the Terminal Server.

- Apply the [Activation Key](#)^[81] you got when buying the Terminal Server Add-On
- Copy the file **ts-serverinstall.exe** to the installation directory of CTI Data Connector for Salesforce on the Terminal Server
- Start the file **ts-serverinstall.exe**. It just copies some files on the server

Now continue with Step 2 - [Install files on the local PC](#)^[126]

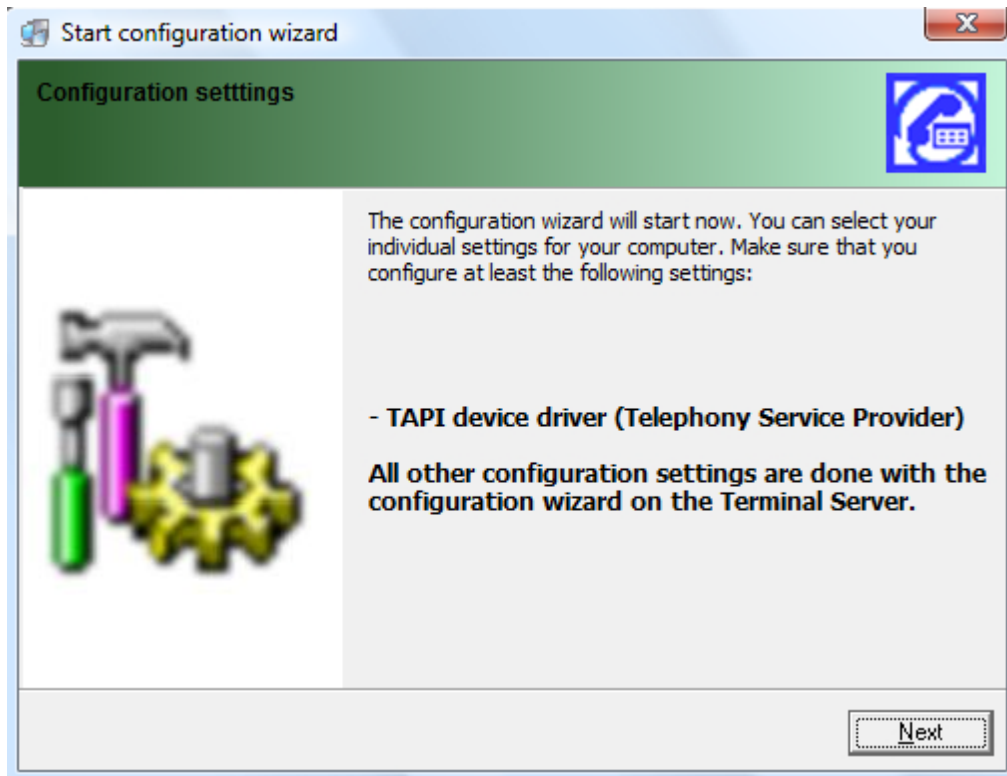
8.3.2 Install files on the local PC

Step 2

Each PC, needs a small component of CTI Data Connector for Salesforce, which

communicates with the Terminal Server.

- Install the TAPI driver from the phone set
- From the installation directory on the server, start the file **ts-clientinstall.exe**
- It installs the necessary files. At the end of the installation you have to configure the TAPI driver.



On the next screen only select your TAPI driver and leave the other settings on their default values.



You have to **reboot** after the installation to initialize the connection to the Terminal Server.

See also

[Where do I find the TAPI driver?](#)¹⁴²
[System requirements - TAPI driver](#)¹⁴¹

8.4 Activate Product

During the trial period, the activation screen appears with each start of the program. You need a Serial Number for activating the product - see [Buy Serial Number](#)¹³¹.

You do not have to reinstall the version and you can directly activate it if:

- You have installed the trial version as a single user version and you bought a single user

- version
- You have installed the trial version as a network version and you bought a network version
- and
- The version you have installed has the same version number like the version you bought - see [How can I check my version number?](#)^[188]



Always activate the software on a workstation and never on the server.

What happens during activation?

The activation process will connect the licence to the PC or Server. **Use the Serial Number only on the PC / Server you want to use CTI Data Connector for Salesforce. The Serial Number cannot be used twice.** After the activation is done, CTI Data Connector for Salesforce will run only on this PC / Server. Your hardware data, Serial Number, name, e-mail address and some program-specific data is transferred to our activation center. No other data stored on your PC will be transmitted.

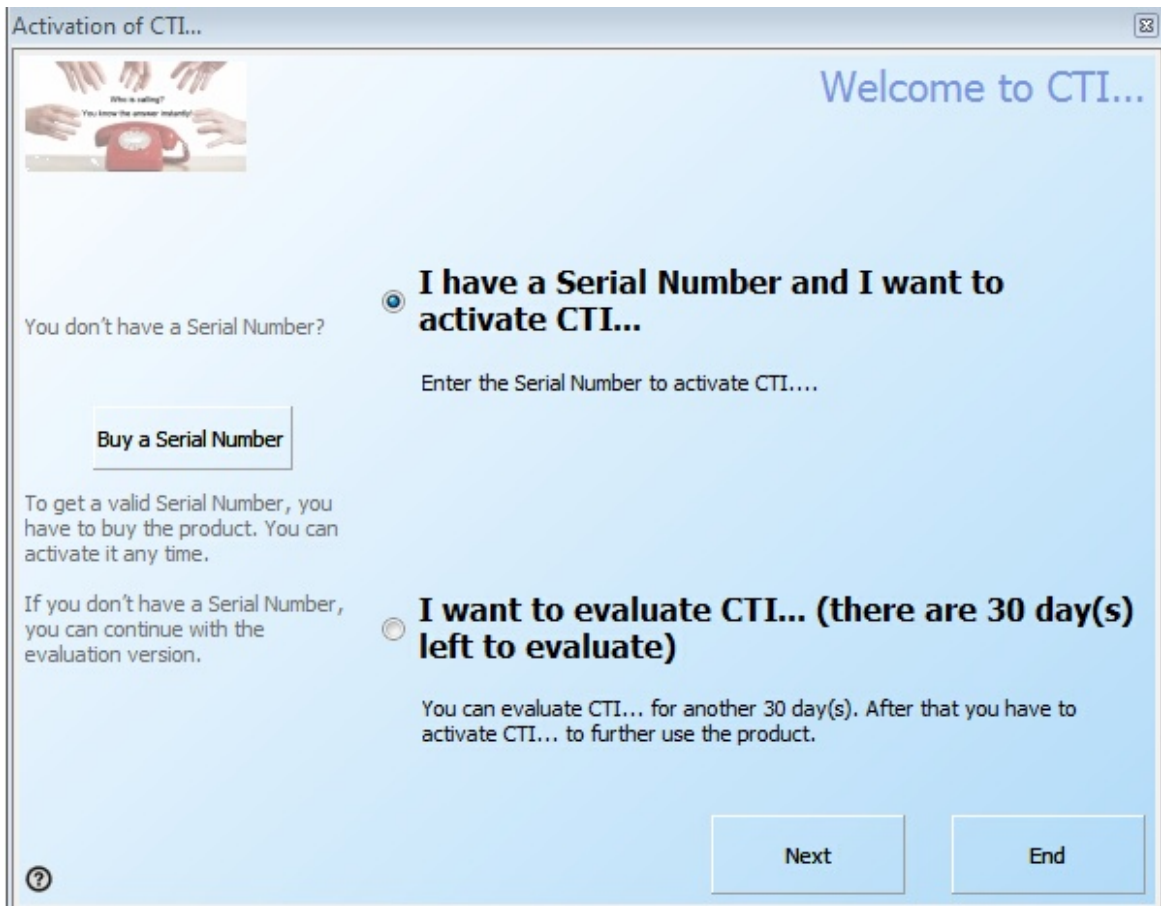


The activation process can be done from any PC, even if you have a network version (starting the activation process on the server is not possible)

Select Activation Method

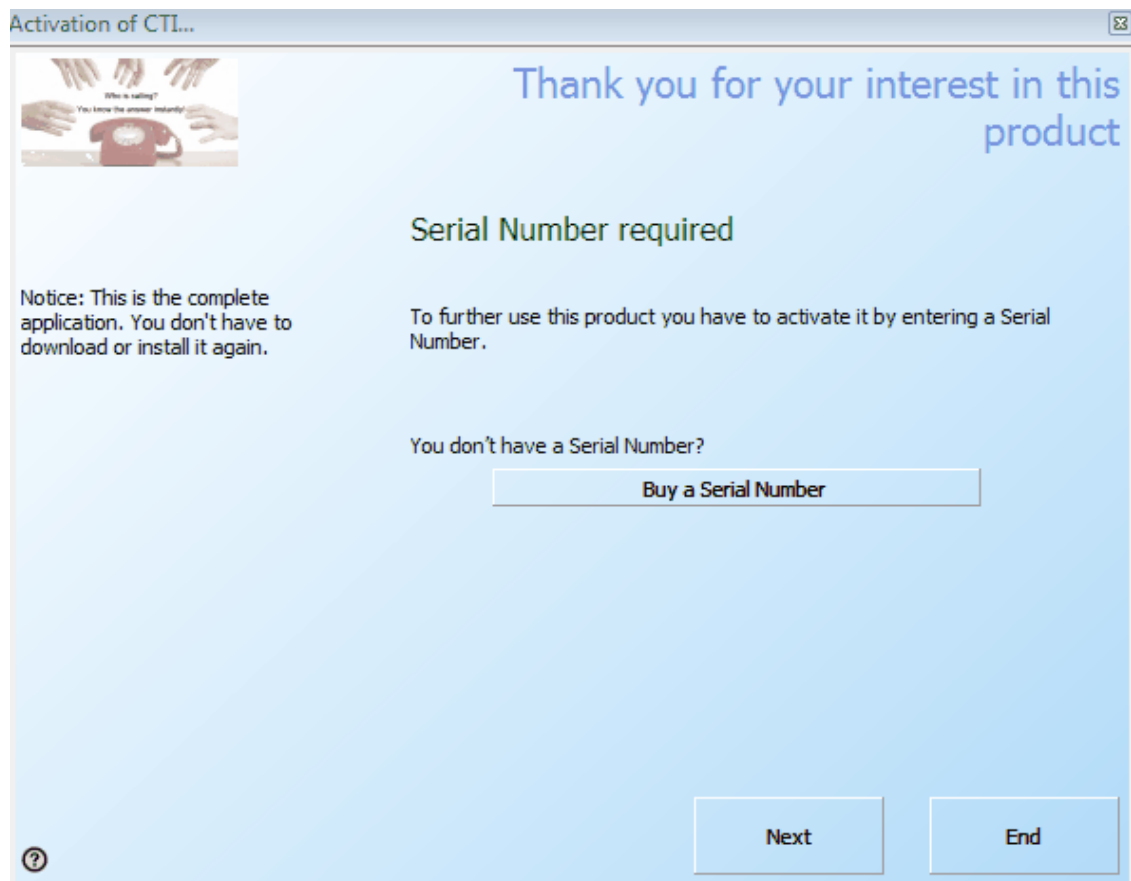
On the first screen select: *I have a Serial Number and I want to activate CTI Data Connector for Salesforce*. This will give you a selection how to activate the product. The [Online Activation](#)^[132] is the recommended activation method and should be used if an Internet connection is available. [E-Mail Activation](#)^[134] can be used in case the online activation is blocked.

(note: the screen you see could be slightly different)



☐ Message - Serial Number required

If you get the message, that a Serial Number is required, press the button *Next* and select between [online](#)¹³² and [e-mail activation](#)¹³⁴. A Serial Number is required. Without a Serial Number the application can only be terminated using the *End* button.



[Start Video Tutorial for product Activation](#)

See also

[Buy Serial Number](#)

[Online Activation](#)

[E-Mail Activation](#)

[Reinstall Software](#)

[Your CTI Data Connector for Salesforce License](#)

8.4.1 Buy Serial Number

The Serial Number is your **proof of purchase**. It is unique and will look like this:

dO8uc-G1iC9-jOGeA-BqgEX-U71ID-0V1VX

There are 6 blocks each with 5 characters. The blocks are separated by a hyphen for better readability.
For a network version, the Serial Number also includes the number of network licenses.

Buy Serial Number

If you do not have a valid serial number, click on the Link ***Buy a Serial Number online***

Activate CTI Data Connector for Salesforce

Activate the product [Online](#)¹³² or by [E-Mail](#)¹³⁴.

8.4.2 Online Activation


The Online Activation needs the [Serial Number](#)¹³¹, company name, your name, country and your e-mail address.. Press the button **Next**. Then the licence will be verified online and activated. If the Activation is successful, the screen [Activation finished](#)¹³⁷ is displayed.

No additional step will be required. CTI Data Connector for Salesforce can now be used on this PC / Server.



Backup your Serial Number. You will need it for a [reinstallation](#).¹³⁷

Activation of CTI...



Please enter the activation data

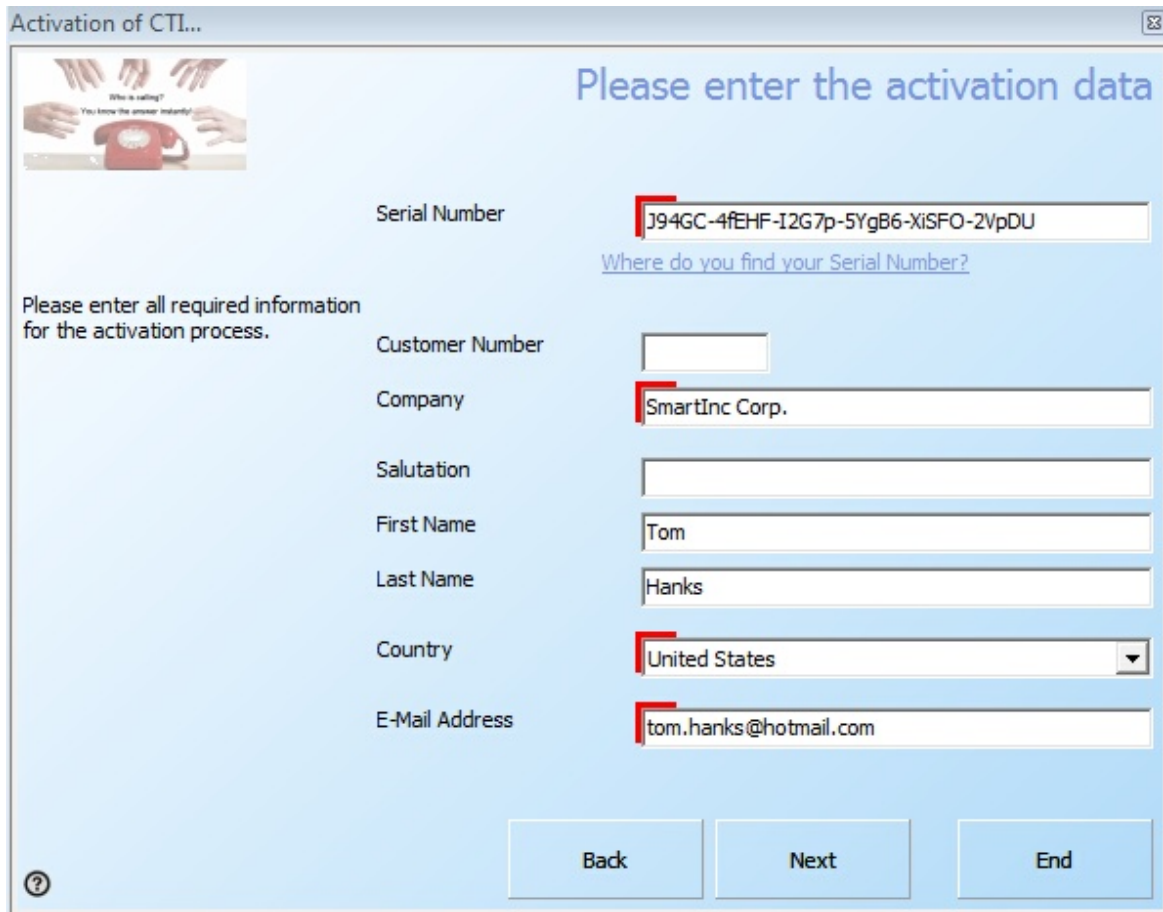
Please enter all required information for the activation process.

Serial Number	<input type="text" value="J94GC-4fEHF-I2G7p-5YgB6-XiSFO-2VpDU"/> Where do you find your Serial Number?
Customer Number	<input type="text"/>
Company	<input type="text" value="SmartInc Corp."/>
Salutation	<input type="text"/>
First Name	<input type="text" value="Tom"/>
Last Name	<input type="text" value="Hanks"/>
Country	<input type="text" value="United States"/>
E-Mail Address	<input type="text" value="tom.hanks@hotmail.com"/>

?

8.4.3 E-Mail Activation

The E-Mail Activation needs the [Serial Number](#)¹³¹, company name, your name, country and your e-mail address.




The screenshot shows a window titled "Activation of CTI...". Inside, there's a header area with a small illustration of hands holding a red telephone and the text "Please enter the activation data". Below this, a list of fields is presented on the left, with corresponding input fields on the right. The fields are: Serial Number (with a red box around the input), Customer Number, Company, Salutation, First Name, Last Name, Country (a dropdown menu), and E-Mail Address. A link "Where do you find your Serial Number?" is positioned below the Serial Number field. At the bottom, there are three buttons: "Back", "Next", and "End". A help icon (?) is located in the bottom left corner of the form area.

Field	Value
Serial Number	J94GC-4fEHF-I2G7p-5YgB6-XISFO-2VpDU
Customer Number	
Company	SmartInc Corp.
Salutation	
First Name	Tom
Last Name	Hanks
Country	United States
E-Mail Address	tom.hanks@hotmail.com

E-Mail Activation

Request Unlock Key

After filling out the screen, select: **Request Unlock Key by E-Mail - send E-Mail**. This will open your default E-Mail client. An e-mail with the hardware IDs and licence information will be created. Press **send** to send the e-mail to our activation center. You will get an **Unlock Key** back within 2-3 business days.

Clipboard	Basic Text
 Send	From ▾ Dieter Härle
	To... register@registerserver.net
	Cc...
	Bcc...
	Subject: Activation Request for CTI...

Activation-Request for CTI... (12.03.2011 16:10:17)
Please do not change the following information
Name/Company: SmartInc Corp.
Serial Number: J94GC-4fEHF-I2G7p-5YgB6-XiSFO-2VpDU
E-Mail-Address: tom.hanks@hotmail.com
Installation Codes:
01: 495B90B8
02: CB433287
03: B6EABB6A
04: E1266C60
05: 394EB475
06: 9A983C03
07: DE278BD8
08: E60FC245
09: E5660DC8
10: 58B1B944
11:
12: E1266C60

Project: CDC-OE-EASYGO-301 - CDC02
User Info:
(here you can write comments to the Activation Center)

Registration Data:
Customer Number:
Company: SmartInc Corp.
Salutation:

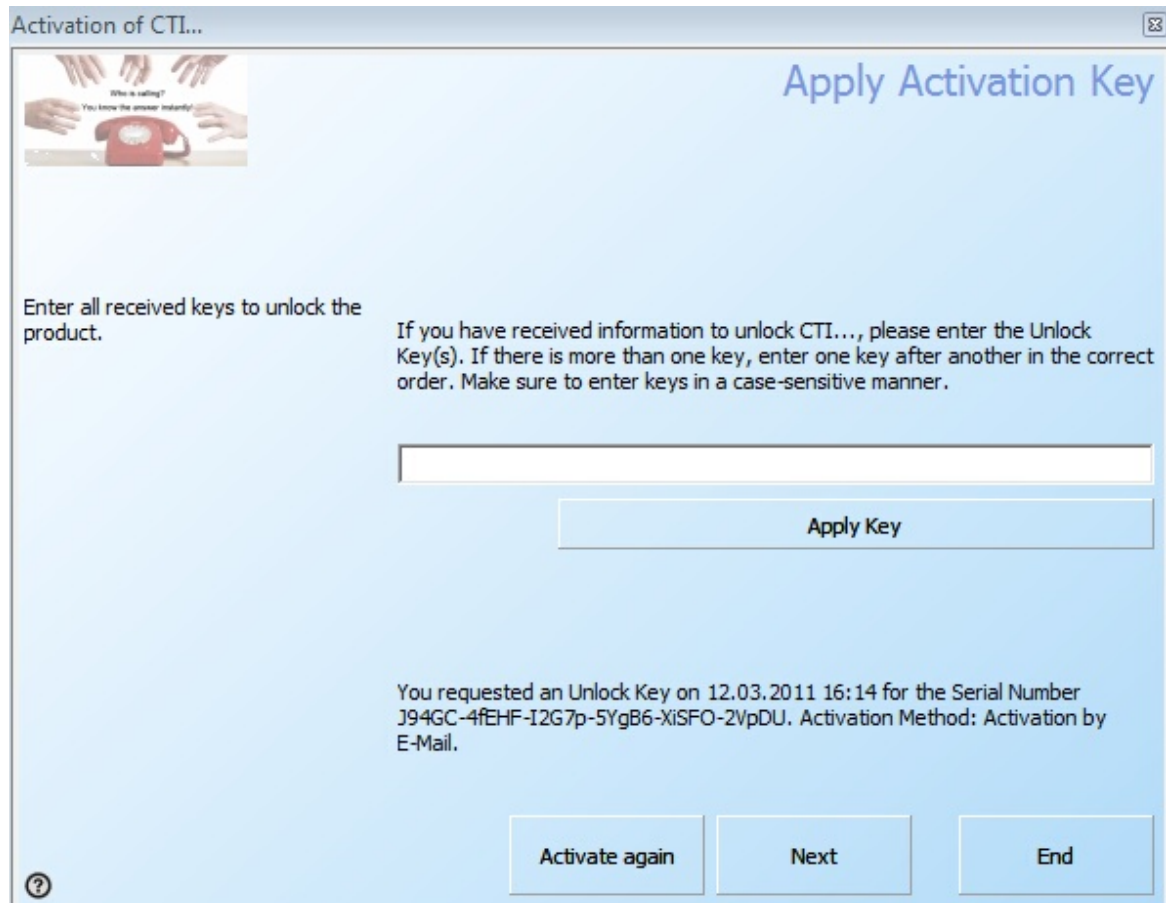
E-Mail Activation - send E-Mail



In case your e-mail client does not open or you use a Browser based e-mail, you can open your e-mail and copy the content with CTRL+V. The e-mail address to send the e-mail is displayed on the next screen.

Enter Unlock Key

After requesting the Unlock Key by fax, the screen shown below will appear during each start of the program. Type in the Unlock Key you got back by e-mail or fax. Press the button *Next*. If the Activation is successful, the screen [Activation finished](#)¹³⁷ is displayed.



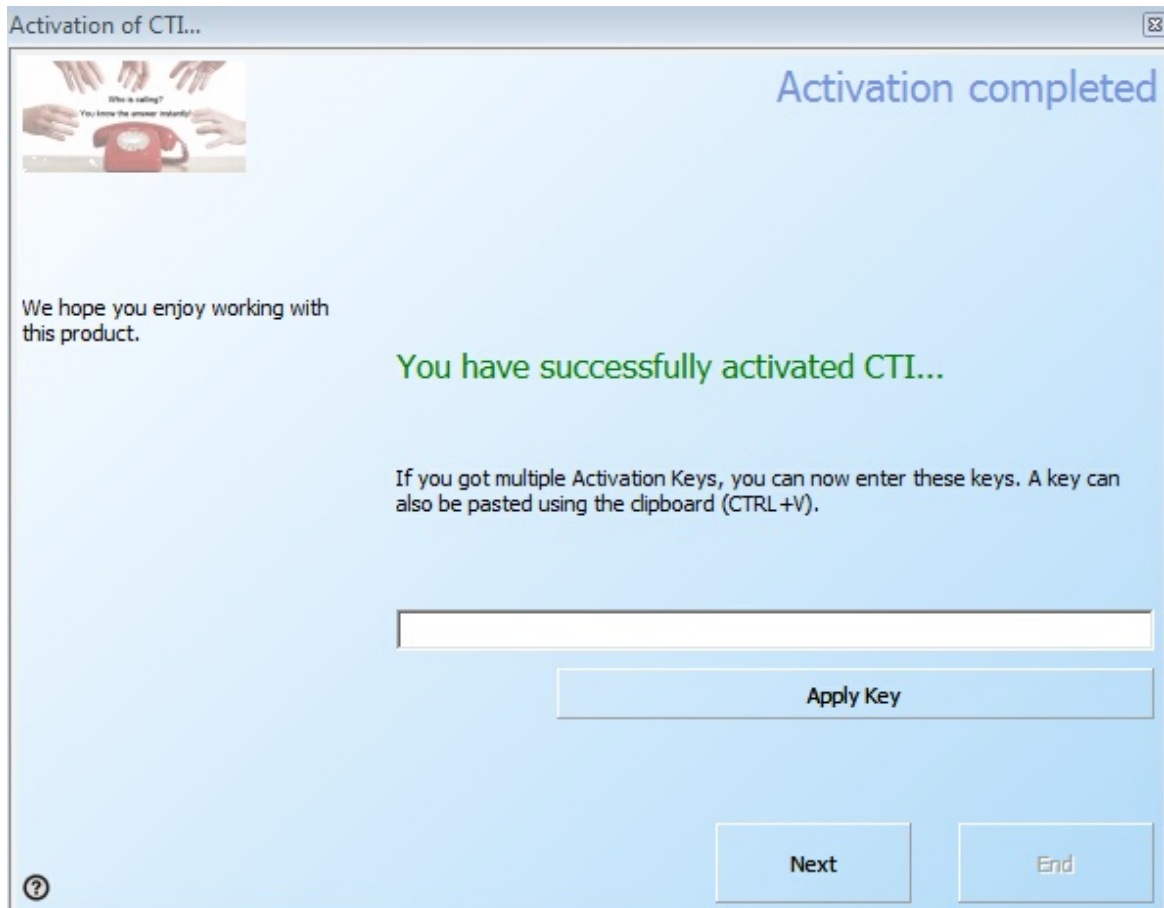
Enter Unlock Key



Backup your Serial Number. You will need it for a [reinstallation](#)¹³⁷.

8.4.4 Activation finished

Either after the [Online Activation](#)¹³² screen or after entering the [Unlock Key](#)¹³⁶, the final screen appears to signal that the activation was successful. Press the button *Next* to complete the activation process to get the screen **Activation finished**.



If you got additional keys, e.g. for an update subscription, you can copy and paste the keys now.

8.4.5 Reinstall Software

You can reinstall the application **on the same PC / Server** as often as you like. First uninstall CTI Data Connector for Salesforce, delete the complete **installation folder**, then reinstall the application - see [How do I activate CTI Data Connector for Salesforce?](#)

See also

[Installation](#) ⁸⁸

8.5 Install an update

To install the latest update.

8.6 Transfer license / Move to another computer

You can move the license to a **new computer** (single user installation) or **new server** (network installation). The license will be deactivated on the current computer / server. The Serial Number can then be used again on another computer / server to activate the product.

This process requires an **online connection**. You only can transfer a license for a full version (no demo version).

Note

The functionality is available within a **network installation** only if the application is started with **cdcsfe -admin** to prevent, that the license is transferred accidentally. A single PC within a network can be always deactivated without an online connection - see [Deactivate a PC within a network](#) ¹⁵⁷.

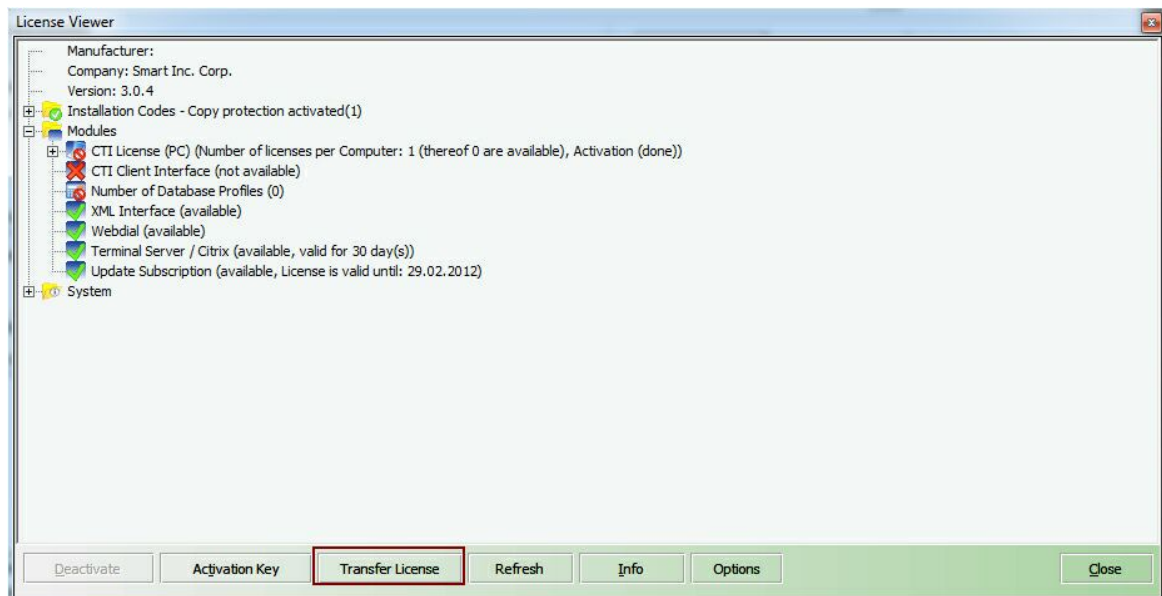
Step 1 - Show License Viewer



Blue icon , right mouse click - **Show License Information**

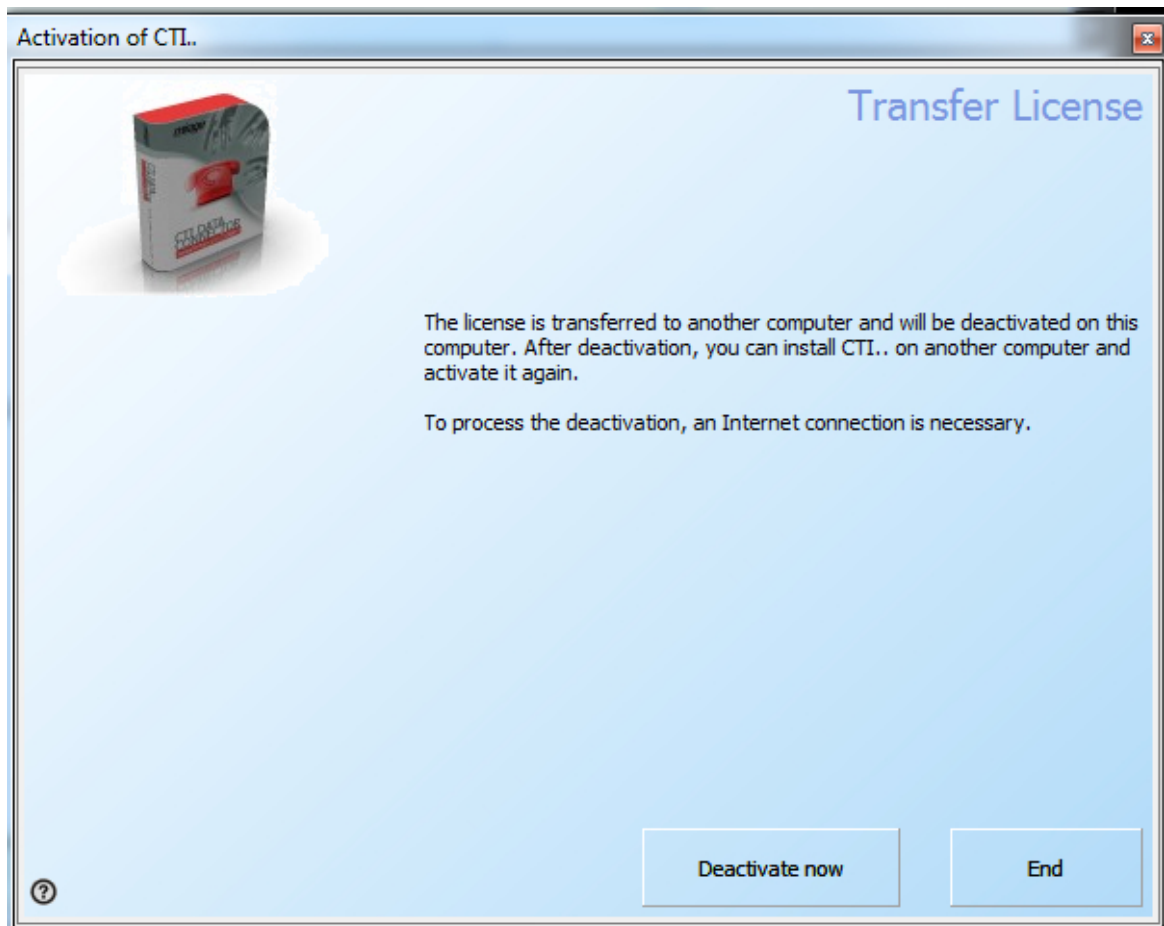
Step 2 - Transfer License

Click on the button **Transfer License**



Button - Transfer License

Thereafter an information is displayed, that the license will be deactivated



Screen - License Deactivation

Step 3 - Activate CTI Data Connector for Salesforce on a new computer

You can reuse the Serial Number on a new computer to activate CTI Data Connector for Salesforce



- After the license was deactivated, you can reactivate it during the next program start as long as the Serial Number was not used on another computer
- The license can be transferred multiple times between computers - Example: Transfer license from PC A to PC B. Then deactivate on PC B and activate again on PC A

8.7 Installation FAQ

This chapter introduces **F**requently **A**sksed **Q**uestions around the installation process.

- [System Requirements - TAPI driver](#)¹⁴¹
- [Where do I find the TAPI driver?](#)¹⁴²
- [How do I activate CTI Data Connector for Salesforce?](#)¹²⁸

8.7.1 System Requirements - Operating system

Windows XP to Windows 7 (32bit and 64 bit) is supported. Every Windows System (especially XP) needs the latest service pack. CTI Data Connector for Salesforce can be installed on a server but this is not mandatory.

The integration in salesforce requires one of the following salesforce editions: *Professional, Enterprise, Unlimited oder Developer Edition.*

8.7.2 System Requirements - TAPI driver

Telephone System

To communicate with a phone system, either a CTI server (Third Party Solution) or the connection of the phone set to the PC (First Party Solution) is supported. For both systems a **TAPI driver 2.x (also referred to as TSP)** is mandatory. See details for TAPI - [Where do I find the TAPI driver?](#)¹⁴²

If you are using a modem, we strongly recommend switching to a phone set connected to the PC (via USB/serial), because the TAPI drivers of modems often do offer only basic functions or do not function at all.

ISDN phones without a PBX are available with an inbuilt TAPI driver.

VOIP systems like Cisco Call Manager, Avaya, Swyx or Innovaphone normally have a TAPI driver included.

Some SIP phones offer TAPI support, e.g. Global IP Telecommunications Ltd (Ninja) www.globalipphones.com

Please check firstly with your phone vendor about which solution meets your requirements and how you can install and configure the TAPI driver. You can contact Support@mirage-systems.de if you do have the TAPI driver installed and CTI Data Connector for Salesforce has problems with making an outgoing call or receiving incoming calls.

Operating System

Windows XP to Windows 7 (32bit and 64 bit) is supported. Every Windows System (especially XP) needs the latest service pack.

Some TAPI drivers do not work on **64bit operating** systems. You can use a virtual machine with 32bit operating system. An example, how this is working is explained for [MAC OS X](#).^[151] For Windows Vista or Windows 7 64bit, the same virtual machines can be used.

Salesforce

The Salesforce *Professional*, *Enterprise*, *Unlimited* or *Developer Edition* is required for the call center functionality. If you are using the *Team Edition*, contact Support@mirage-systems.de for an alternative solution.

See also

[Configure](#)^[56] the TAPI driver within CTI Data Connector for Salesforce
[Where do I find the TAPI driver?](#)^[142]

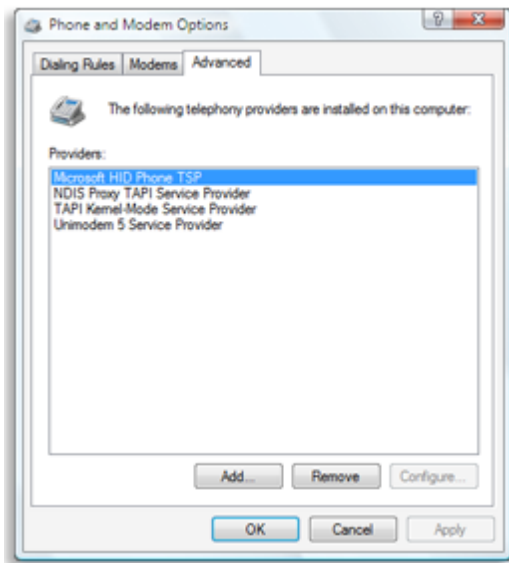
8.7.3 Where do I find the TAPI driver?

Telephony Application Programming Interface (TAPI) is a programming interface for CTI (computer telephony integration) applications.

Applications using TAPI need a **TAPI driver (also referred to as TSP)**. This TAPI driver has to be delivered by the **phone manufacturer**. As this driver is always device-dependent, it is not possible to use a generic driver which is supplied with the operating system. The driver often has the name of the manufacturer or the phone system, sometimes in combination with the extension number.

To check whether a TAPI driver is installed, do the following (Instructions for Windows XP).

- Start, Control Panel
- Phone and Modem options
- TAB **advanced**



There are a lot of drivers which come with Windows like *NDIS Proxy TAPI Service Provider*. Search for a driver with the name of the **PBX, PBX vendor or your direct line**. If this driver is missing, you probably do not have the correct TAPI driver for your PBX.



If your TAPI driver is not listed here see: [I cannot select my TAPI driver in the configuration wizard](#)^[172]

See also

[System Requirements](#)^[141] TAPI driver
[Configure](#)^[56] the TAPI driver within CTI Data Connector for Salesforce

8.7.4 How do I activate CTI Data Connector for Salesforce?

During the trial period, the activation screen appears with each start of the program. You need a Serial Number for activating the product - see [Buy Serial Number](#)^[131].

You do not have to reinstall the version and you can directly activate it if:

- You have installed the trial version as a single user version and you bought a single user version
- You have installed the trial version as a network version and you bought a network version

and

- The version you have installed has the same version number like the version you bought - see [How can I check my version number?](#)¹⁸⁸



Always activate the software on a workstation and never on the server.

What happens during activation?

The activation process will connect the licence to the PC or Server. **Use the Serial Number only on the PC / Server you want to use CTI Data Connector for Salesforce. The Serial Number cannot be used twice.** After the activation is done, CTI Data Connector for Salesforce will run only on this PC / Server. Your hardware data, Serial Number, name, e-mail address and some program-specific data is transferred to our activation center. No other data stored on your PC will be transmitted.

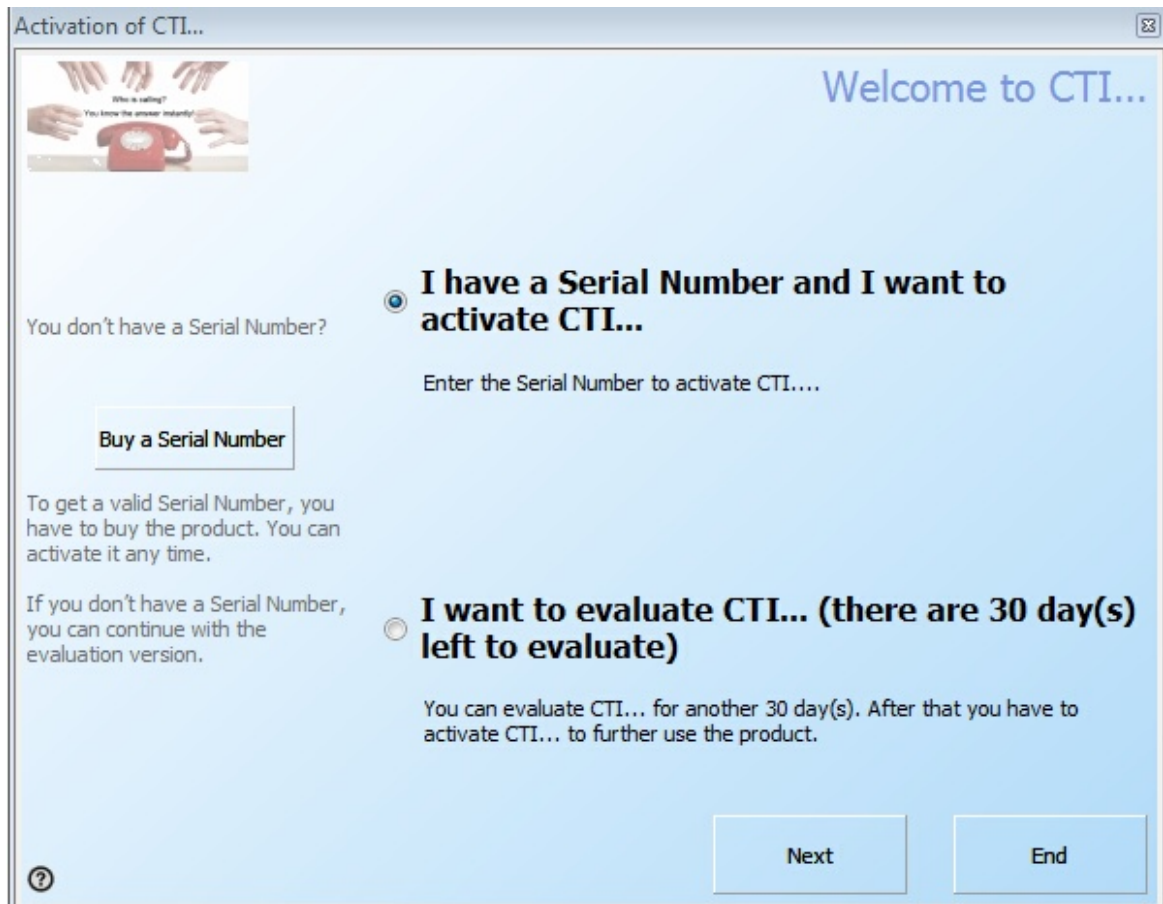


The activation process can be done from any PC, even if you have a network version (starting the activation process on the server is not possible)

Select Activation Method

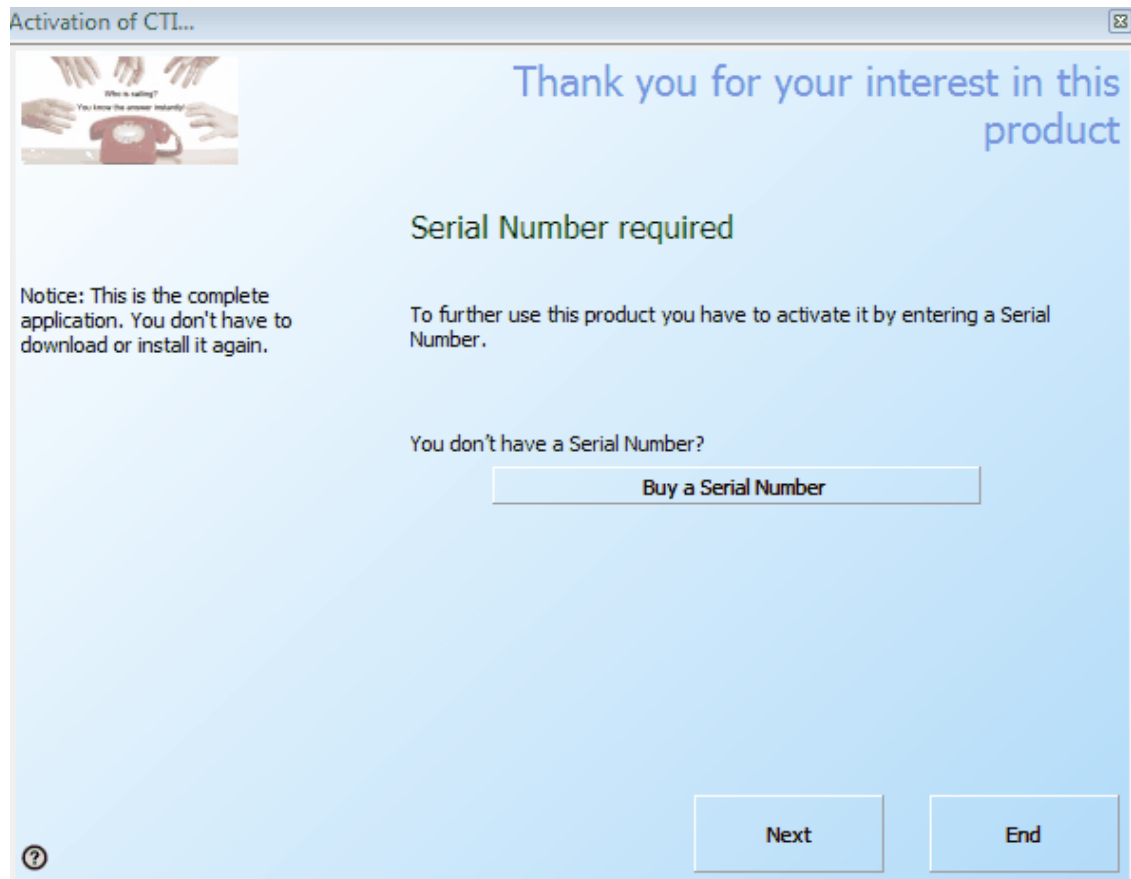
On the first screen select: *I have a Serial Number and I want to activate CTI Data Connector for Salesforce*. This will give you a selection how to activate the product. The [Online Activation](#)¹³² is the recommended activation method and should be used if an Internet connection is available. [E-Mail Activation](#)¹³⁴ can be used in case the online activation is blocked.

(note: the screen you see could be slightly different)



☐ Message - Serial Number required

If you get the message, that a Serial Number is required, press the button *Next* and select between [online](#)¹³²⁾ and [e-mail activation](#)¹³⁴⁾. A Serial Number is required. Without a Serial Number the application can only be terminated using the *End* button.



[Start Video Tutorial for product Activation](#)

See also

[Buy Serial Number](#) ¹³¹

[Online Activation](#) ¹³²

[E-Mail Activation](#) ¹³²

[Reinstall Software](#) ¹³⁷

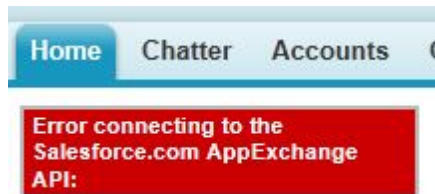
[Your CTI Data Connector for Salesforce License](#) ¹⁵⁴

8.7.5 Errors - Call Center Adapter

Error Messages

The following errors could occur. **After changing a configuration setting always logout from salesforce.**

- ❏ Red error box: Error connecting to the salesforce.com AppExchange API - the SoftPhone does not load

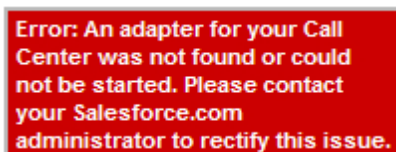


If you get this error, contact salesforce support to enable the API. The API is disabled by default in a test account and also in the Professional Edition.

Note: The API is not required if you install CTI Data Connector for Salesforce version 3.0.5 (released 2/2012). Contact support@mirage-systems.de to get this update.

If you are using Enterprise Edition or higher see: [API is not enabled for this Organization or Partner](#)^[147]

- ❏ Red error box: An Adapter for your Call Center was not found or could not be started. Please contact your Salesforce.com administrator to rectify this issue



The error message indicates, that the Salesforce Adapter DLL could not be registered

- In case you installed a call center adapter from other vendors **uninstall** it and **delete the adapter within salesforce**
- Quit CTI Data Connector for Salesforce ([blue icon](#)^[24], right mouse click, Quit)
- Install CTI Data Connector for Salesforce again using **Windows Administrator** credentials
- If the error persists send us a [log file](#)^[150]

- ❏ Red error box: API is not enabled for this Organization or Partner

If you are using Professional Edition or a test account see: [Error connecting to the salesforce.com AppExchange API - the SoftPhone does not load](#)^[147]

Note: The API is not required if you install CTI Data Connector for Salesforce version 3.0.6 (released 1/2012). Contact support@mirage-systems.de to get this update.

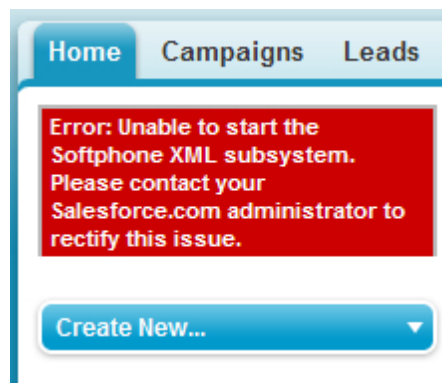
If you are using Enterprise Edition or higher, check the **profile** (Setup, Administration Setup, Manage Users, Profiles) which is associated to the user. There is an option: **API Enabled**. This must be checked. Also verify if the option: **Call Center** is checked with the option *Visible*

- ❏ Red error box: Unable to start the salesforce.com Office Toolkit

DLLs have not been registered properly. Install CTI Data Connector for Salesforce again using **Windows Administrator** credentials

Note for Administrators: The file **SF_MSApi4.dll** is not registered. It is in the folder c:\program files\CTI Data Connector for salesforce 3.0\call center adapter and can be manually registered using regsvr32

- ❏ Red error box: Unable to start the softphone XML subsystem



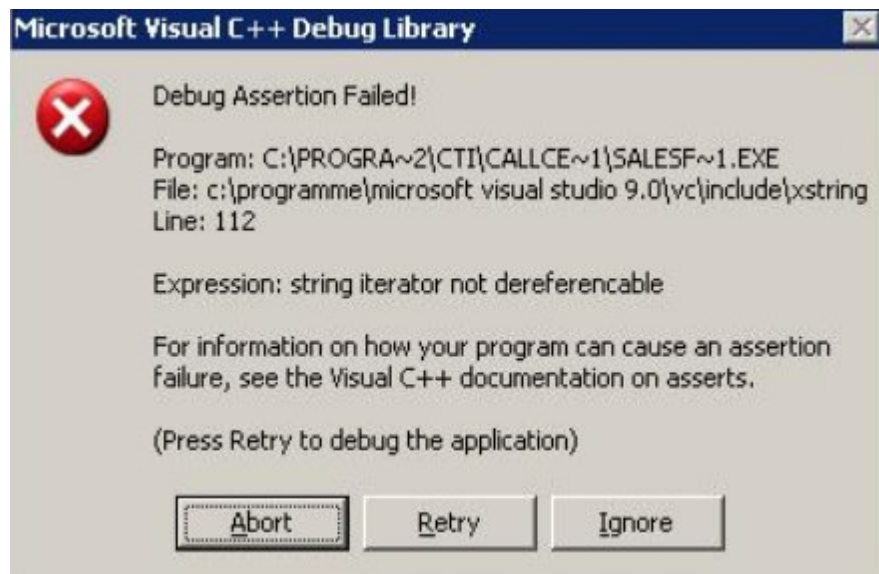
This error means that the XML subsystem, MSXML6, has not been installed or properly registered. Search "Unable to start the Softphone XML subsystem." in Salesforce.com Help & Training for troubleshooting steps.

- [Download MSXML6 Parser](#) .Restart Windows after installation

Note for Administrators: The file **msxml6.dll** is missing or not registered. It is in the folder c:\windows\system32 and can be manually registered using regsvr32

- ❏ Microsoft Visual C++ Debug Library

Error Message





The error message indicates, that different versions of the Salesforce Adapter DLL are installed


- In case you installed a call center adapter from other vendors **uninstall** it and **delete the adapter within salesforce**
- Quit CTI Data Connector for Salesforce ([blue icon](#)^[24], right mouse click, Quit)
- Install CTI Data Connector for Salesforce again using **Windows Administrator** credentials
- If the error persists send us a [log file](#)^[150]

- ☐ The SoftPhone does not load in Firefox or Safari

[See Browser Support](#)^[99]

- ☐ Phone icon is grey

Right to the phone number there is a **grey** icon  instead of a green  icon or the text: *click to dial disabled* is displayed when you click on a phone number

Check if the red salesforce icon  is visible See also System Tray icon.


- ☐ The icon is NOT visible
If the icon is not visible quit CTI Data Connector for Salesforce and start it again. If the icon is still not visible
 - Check if an error in a [red box appears](#)^[147]
 - If there is no error message, install CTI Data Connector for Salesforce again using **Windows Administrator** credentials

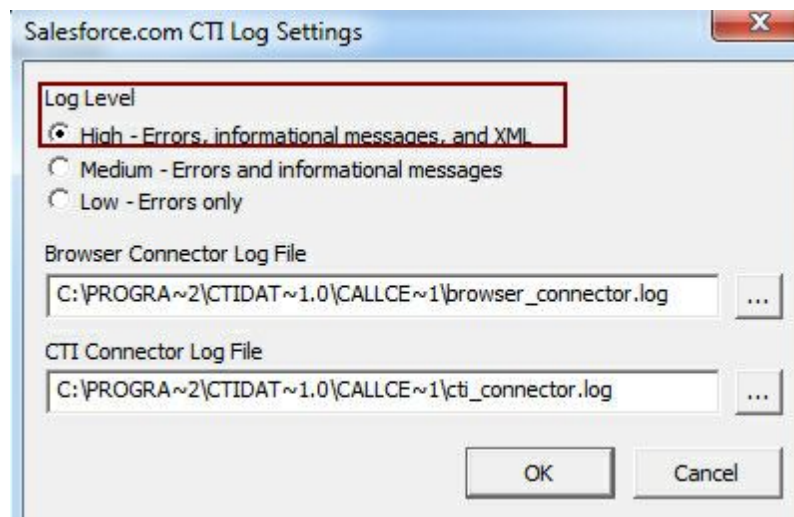
- If the error persists send us a [log file](#)¹⁵⁰

☐ The icon is visible

- Check if you get an [API error](#)¹⁴⁷
- If the error persists send us a [log file](#)¹⁵⁰

In case an error cannot be solved, send us a log file

- Right click on the red salesforce icon . Then select **Logging....** See also System Tray icon.
- Check **High** - Errors, informational messages, and XML



- Quit CTI Data Connector for Salesforce ([blue icon](#)²⁴, right mouse click, Quit) and **start it again**
- Send both log files (browser_connector.log and cti_connector.log) to Support@mirage-systems.de. You find the files in the folder 3.0\call center adapter.

The integration in salesforce requires one of the following salesforce editions:
Professional, Enterprise, Unlimited oder Developer Edition.

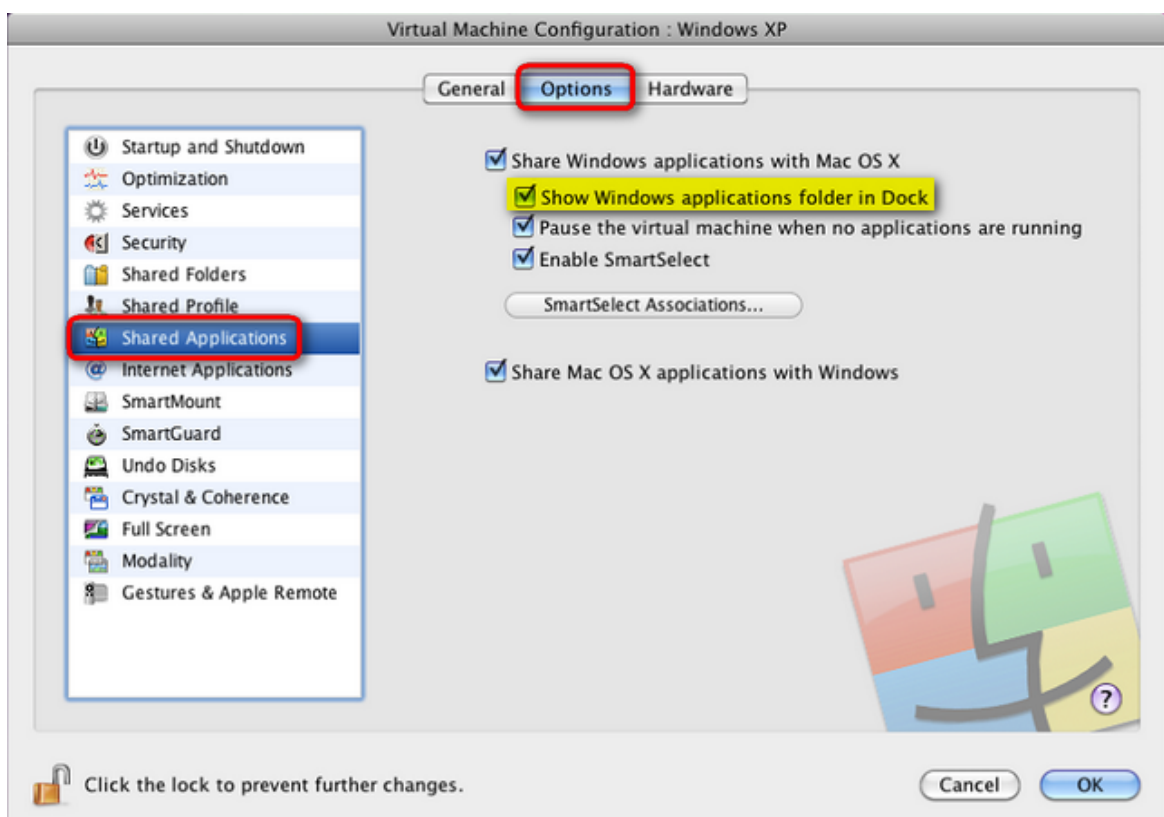
8.8 MAC OS X

CTI Data Connector for Salesforce can be used on MAC OS X in combination with [Parallels Desktop for MAC](#) (recommended) or VMware. As host operating system Windows 7, 32bit is recommended.

Step 1 - Configuration Settings in Parallels Desktop 7

Find below recommended configuration settings.

The windows applications folder can be displayed in the MAC Dock. You can start CTI Data Connector for Salesforce with all installed applications by clicking on the icon



Display Windows Application Folder in Dock

Step 2 - Install CTI Data Connector for Salesforce in the Virtual Machine

Within Windows 7, open the file Explorer (right mouse click, Windows Explorer)

First, install the [TAPI \(TSP\)](#)¹⁴² driver in the virtual machine. Then install CTI Data Connector for Salesforce

- [Single User Installation](#)^[88]
- [Network Installation](#)^[100]

Step 3 - Advice how to use CTI Data Connector for Salesforce in combination with the virtual machine

- The virtual machine should be used in **coherence mode**. Windows is then 'invisible' and CTI Data Connector for Salesforce works like a normal MAC OS X application. To change to coherence mode **Choose Enter Coherence** from the virtual machine **View menu**
- During the first program start, the icon of CTI Data Connector for Salesforce appears in the dock. With right mouse click, **Options, Keep in Dock**, the icon is kept in the dock. IN the future, you can start CTI Data Connector for Salesforce by clicking on the icon



- Windows Internet Explorer must be started from the virtual machine. You can also add the Internet Explorer to the dock (right mouse click, **Options, Keep in Dock**). You have to use this Browser in combination with salesforce
- All options of CTI Data Connector for Salesforce with [left or right mouse](#)^[22] click are **not** available. The configuration wizard has to be started using the windows application



folder

Step 4 - Install on other workstations

The virtual machine can be used on other workstations. You have to observe the license agreement of Parallels and Windows.

Part



IX

9 Part II - Enhanced Features

These lessons explain CTI Data Connector for Salesforce features. It is mainly for administrators. After completing them, you will have experience with these tasks:

- License Information - [chapter Your CTI Data Connector for Salesforce License](#)^[154]
- [How TOs and FAQ](#)^[166]
- [Distribute Client Setup](#)^[112]
-

9.1 Your CTI Data Connector for Salesforce License

CTI Data Connector for Salesforce comes with an own licence file - **cdcsfe.lic**. The licence is a licence **PER PC / COMPUTER**. Copy Protection is turned on after activation. We recommend backing up the licence file and all [Activation Keys](#)^[81] you got.

- You have to activate the product before you can use it without the restrictions of the [demo version](#)^[154] - see [How do I activate CTI Data Connector for Salesforce](#)^[128]
- Find out more about your licence in the chapter - [Show License Information](#)^[80]
- See [License Agreement](#)^[162] for details of usage.

See also

[Demoversion](#)^[154]
[Browse your License Information](#)^[80]
[Apply Activation Key](#)^[81]
[Deactivate a License](#)^[157]

[License Agreement](#)^[162]

9.1.1 Demoversion

The Demoversion has the following restrictions:

- Limited by days - normally 30 days

All other parts of the application are fully functional

9.1.2 Show License Information

To display the license information, either

- right click on the icon in the [taskbar](#)^[22] - select **Show License Information**

or

- select within the [Control Centre](#)^[24], Menu **Extras**, **Show License Information**

This will open the Licence Viewer where you can view the licenses you have acquired, the number of users/computers who can use the licence and whether a licence has a time limitation or not.

Number of licenses

The folder **CTI License** displays the maximum number of licenses and the number of licenses which are available. If you click on the + sign, all computers using a license will be displayed. See [Deactivate a License](#)^[157] how to deactivate one single computer.

- Number of Computers / PCs which have a license
- [Demoversion](#)^[154] - if omitted it is a full version or time-limited full version
- Valid until (time limitation) - if omitted it is a non time-limited version
- [Web Activation](#)^[128] - either done or required

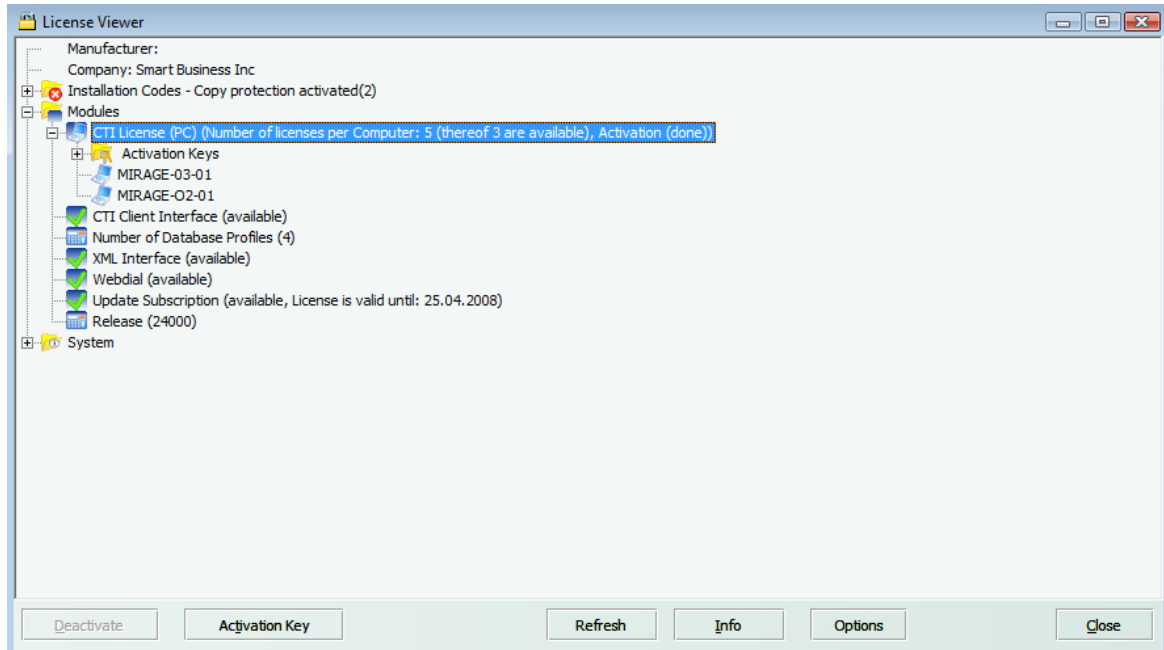
Update Subscription

The update subscription entitles you to install the latest updates as long as it has not expired. See chapter [software update](#)^[12] about how to download updates.

- Available / Not available
- Time limitation - the date when the update subscription expires

Release Number

- Internal release information



9.1.3 Apply Activation Key

An Activation Key is used to modify the license information (e.g. increase number of licenses). All Activation Keys are unique and have the same format like:

fZDdq-aDC95-e54DA-atR82-DL82k-NfC4v

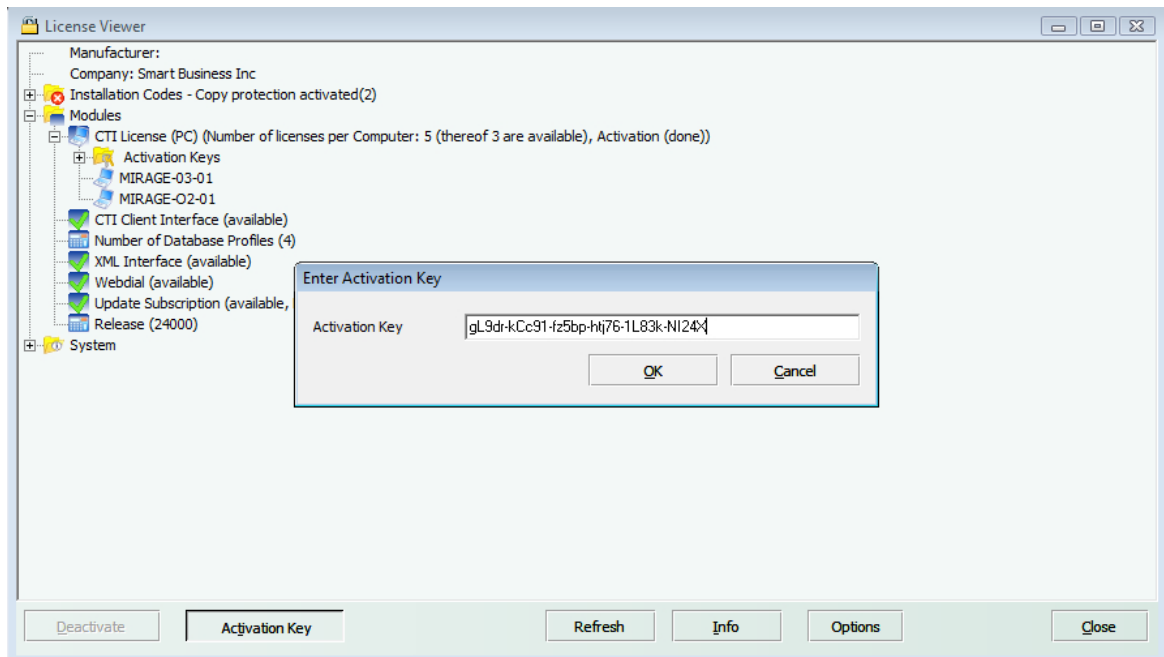
There are 6 blocks each with 5 characters. The blocks are separated by a hyphen for better readability.

If you got an Activation Key via E-Mail or Fax, you can enter the key within the screen [Show License Information](#)⁸⁰.

- Start screen [Show License Information](#)⁸⁰
- Select button *Activation Key*
- Paste the key from the clipboard with CTRL+V



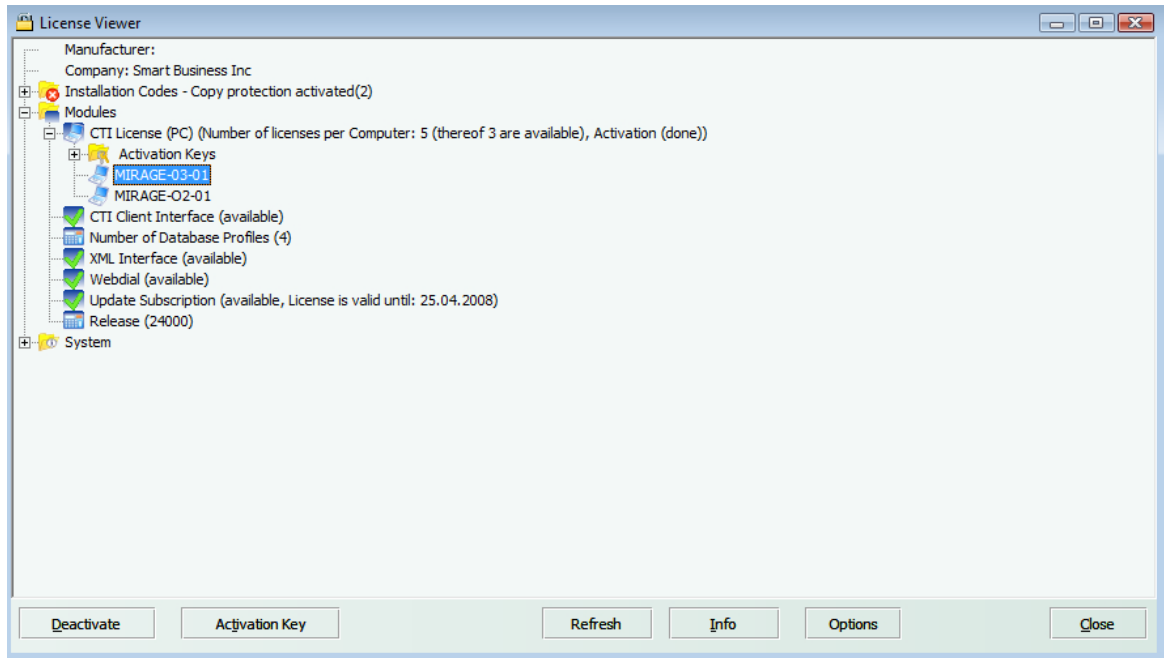
It is possible to validate the Activation Key online. In this case an Internet connection is necessary.



9.1.4 Deactivate a PC within a network

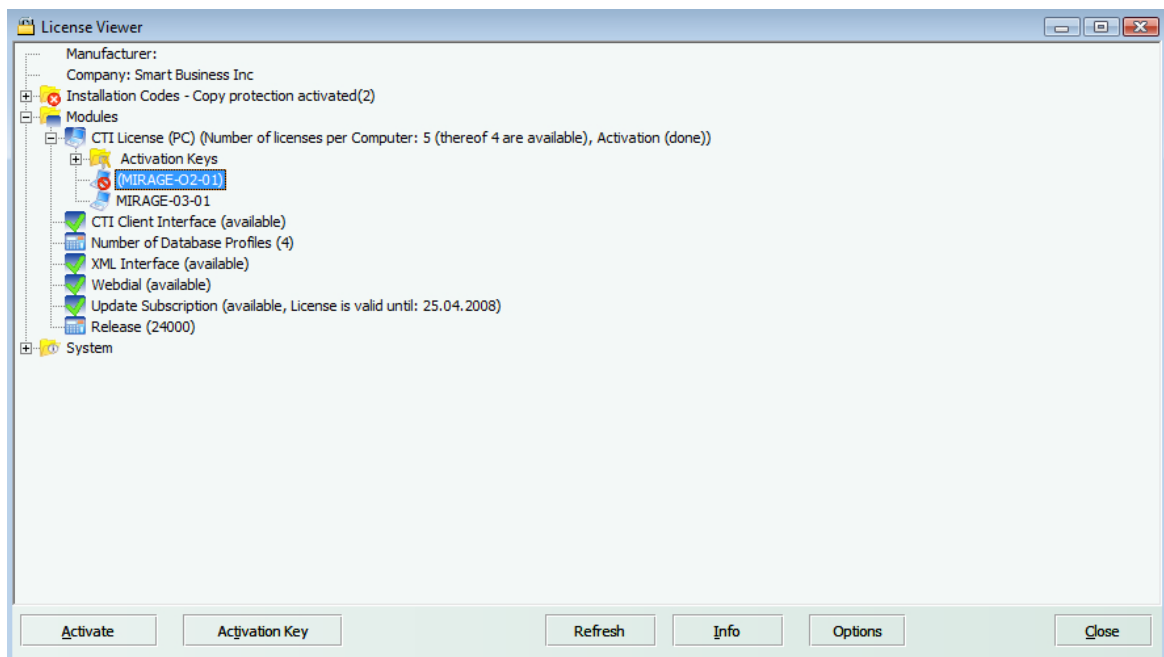
If a PC does not further need the license of CTI Data Connector for Salesforce, its license can be deactivated. The license can then be used by another PC.

- Start screen [Show License Information](#)
- Click on the + sign before *CTI License*, then select the PC the license of which should be deactivated
- Press the button **Deactivate**. The name of the PC will be displayed in brackets - e.g. (PC-2)



Reactivate a license

The license can be activated again by selecting the deactivated PC and then pressing the button **Activate**.



9.1.5 Transfer license / Move to a new computer

You can move the license to a **new computer** (single user installation) or **new server** (network installation). The license will be deactivated on the current computer / server. The Serial Number can then be used again on another computer / server to activate the product.

This process requires an **online connection**. You only can transfer a license for a full version (no demo version).

Note

The functionality is available within a **network installation** only if the application is started with cdcse **-admin** to prevent, that the license is transferred accidentally. A single PC within a network can be always deactivated without an online connection - see [Deactivate a PC within a network](#)¹⁵⁷.

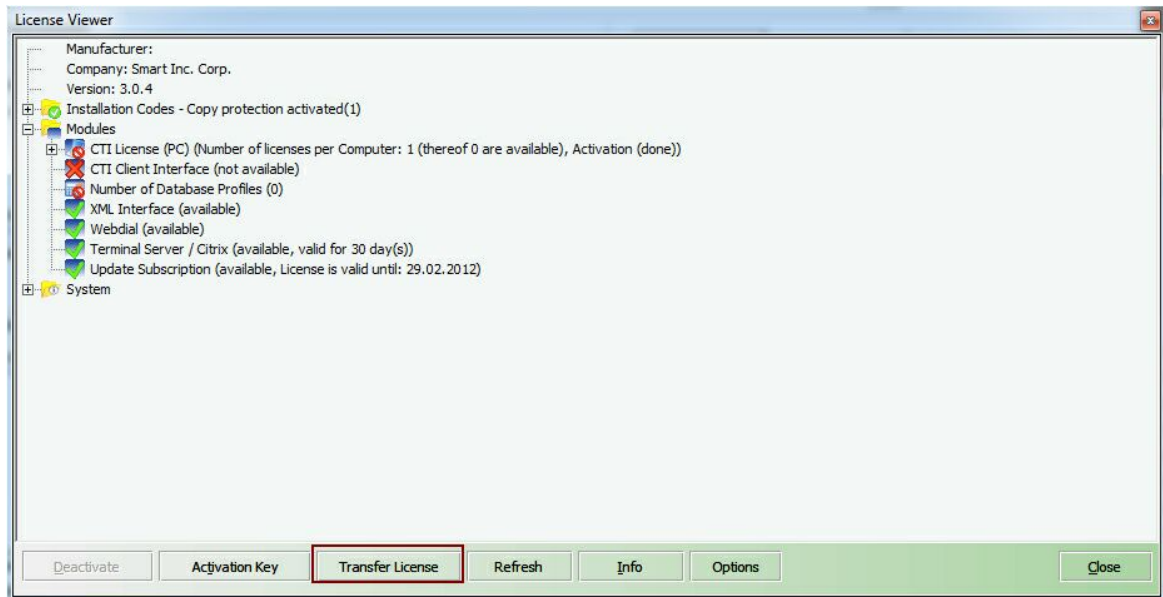
Step 1 - Show License Viewer



Blue icon , right mouse click - **Show License Information**

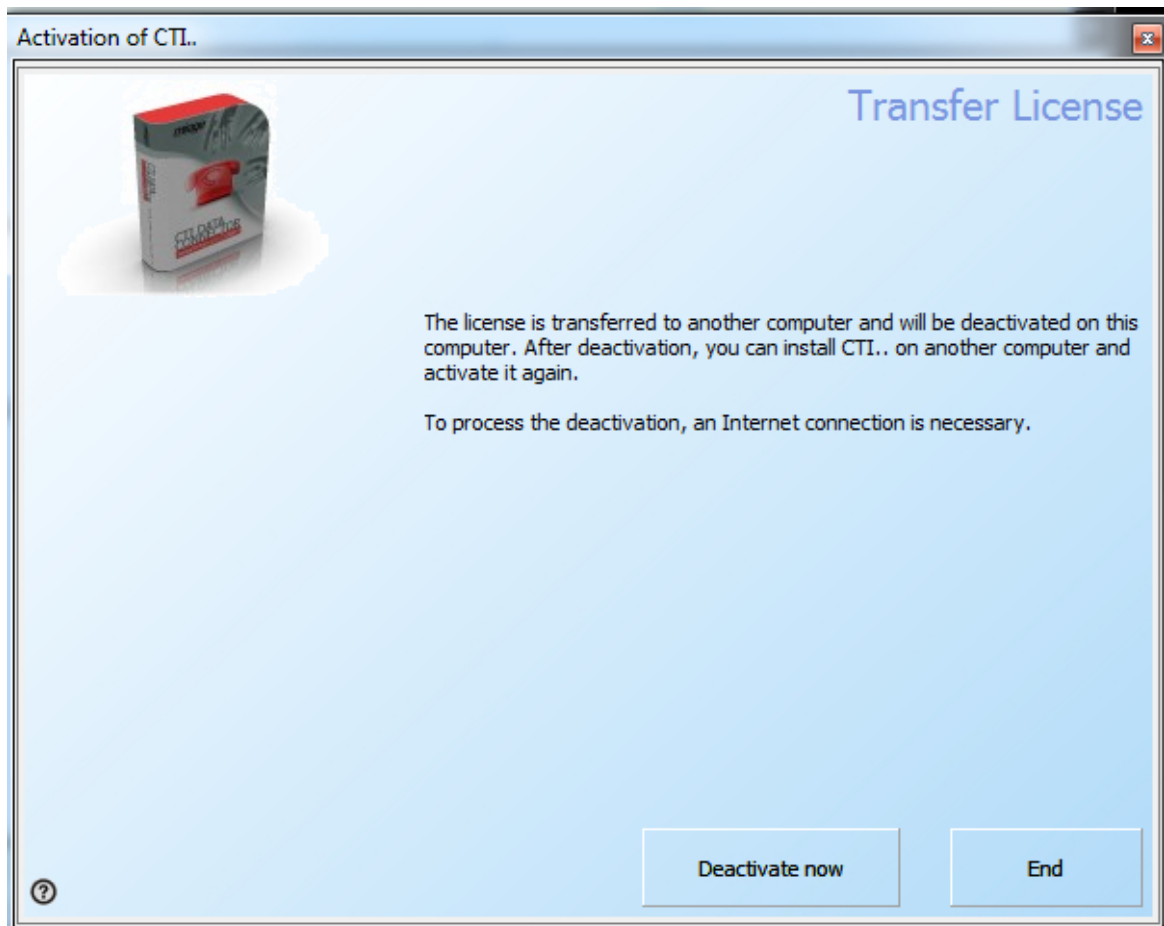
Step 2 - Transfer License

Click on the button **Transfer License**



Button - Transfer License

Thereafter an information is displayed, that the license will be deactivated



Screen - License Deactivation

Step 3 - Activate CTI Data Connector for Salesforce on a new computer

You can reuse the Serial Number on a new computer to activate CTI Data Connector for Salesforce



- After the license was deactivated, you can reactivate it during the next program start as long as the Serial Number was not used on another computer
- The license can be transferred multiple times between computers - Example: Transfer license from PC A to PC B. Then deactivate on PC B and activate again on PC A

9.1.6 License Agreement

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12. Mirage Computer Systems GmbH CUSTOMER CONTACT. If you have any questions concerning these terms and conditions, or if you would like to contact Mirage Computer Systems GmbH for any other reason, please E-Mail: Support@mirage-systems.de. You will find our internet web- site at www.cti-data-connector.com

Date: October 2010
LA-DE-01082003

9.2 How TOs and FAQ

This chapter introduces **F**requently **A**sksed **Q**uestions as well as tips and tricks.

9.2.1 How can I print this Tutorial

Print this tutorial

The Online Tutorial is also available as a PDF document.

[You can print this tutorial - click on the link to download PDF file](#)

9.2.2 How do I activate CTI Data Connector for Salesforce?

During the trial period, the activation screen appears with each start of the program. You need a Serial Number for activating the product - see [Buy Serial Number](#)¹³¹.

You do not have to reinstall the version and you can directly activate it if:

- You have installed the trial version as a single user version and you bought a single user version
- You have installed the trial version as a network version and you bought a network version

and

- The version you have installed has the same version number like the version you bought - see [How can I check my version number?](#)^[188]



Always activate the software on a workstation and never on the server.

What happens during activation?

The activation process will connect the licence to the PC or Server. **Use the Serial Number only on the PC / Server you want to use CTI Data Connector for Salesforce. The Serial Number cannot be used twice.** After the activation is done, CTI Data Connector for Salesforce will run only on this PC / Server. Your hardware data, Serial Number, name, e-mail address and some program-specific data is transferred to our activation center. No other data stored on your PC will be transmitted.

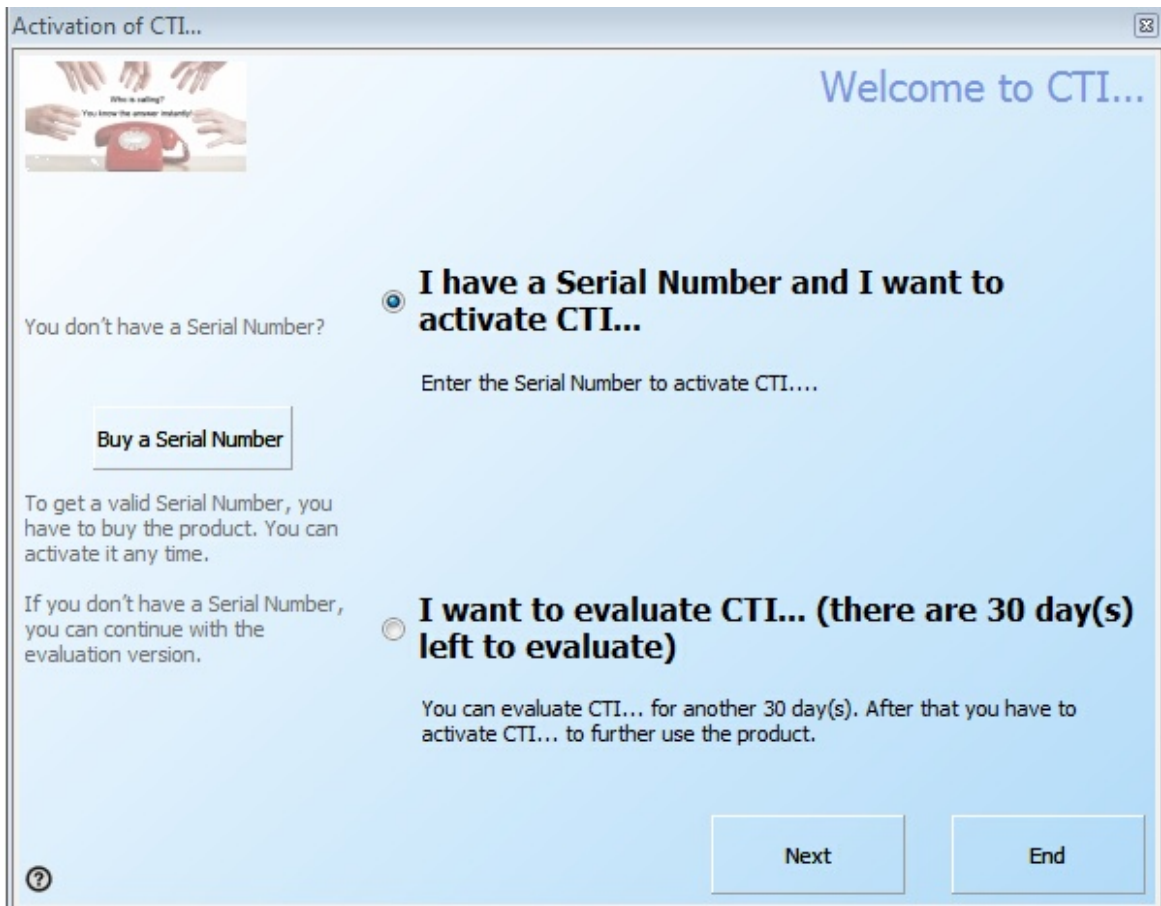


The activation process can be done from any PC, even if you have a network version (starting the activation process on the server is not possible)

Select Activation Method

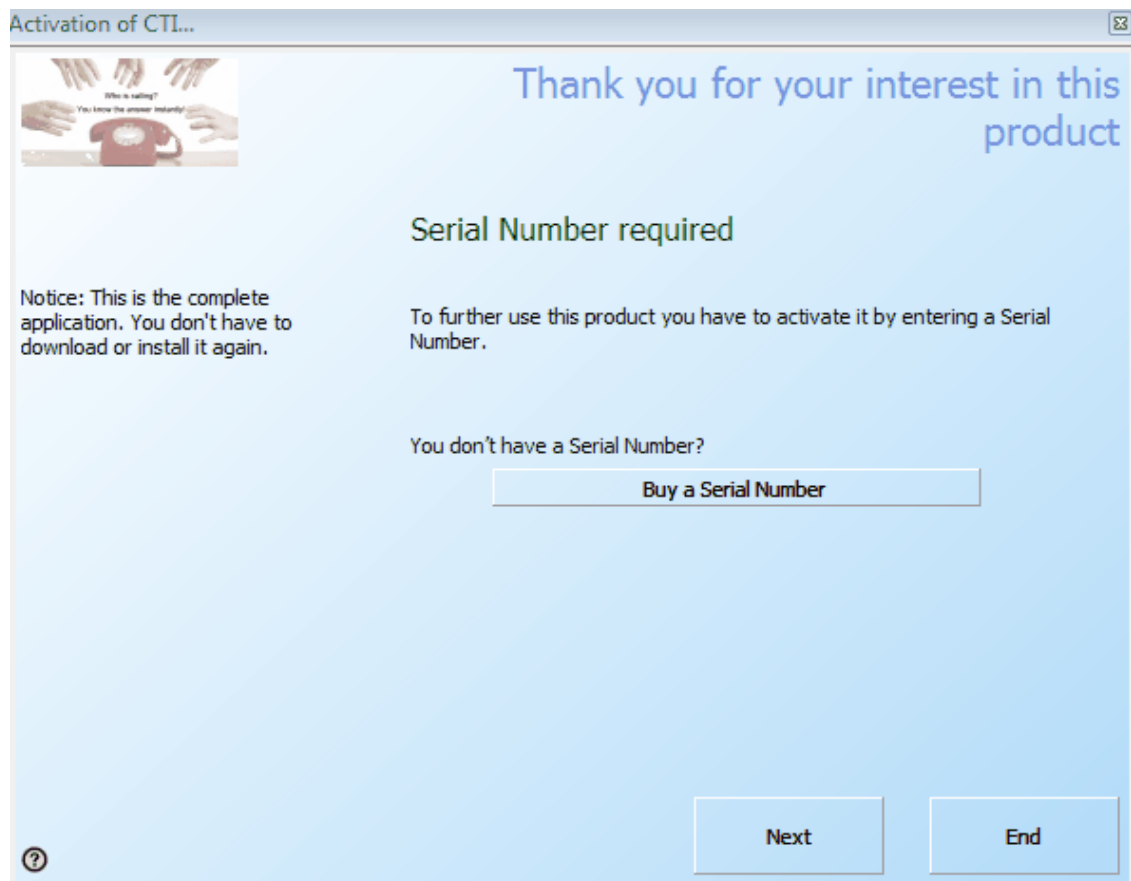
On the first screen select: *I have a Serial Number and I want to activate CTI Data Connector for Salesforce*. This will give you a selection how to activate the product. The [Online Activation](#)^[132] is the recommended activation method and should be used if an Internet connection is available. [E-Mail Activation](#)^[134] can be used in case the online activation is blocked.

(note: the screen you see could be slightly different)



☐ Message - Serial Number required

If you get the message, that a Serial Number is required, press the button *Next* and select between [online](#)¹³² and [e-mail activation](#)¹³⁴. A Serial Number is required. Without a Serial Number the application can only be terminated using the *End* button.



[Start Video Tutorial for product Activation](#)

See also

[Buy Serial Number](#) ¹³¹

[Online Activation](#) ¹³²

[E-Mail Activation](#) ¹³²

[Reinstall Software](#) ¹³⁷

[Your CTI Data Connector for Salesforce License](#) ¹⁵⁴

9.2.3 System Requirements - TAPI driver

Telephone System

To communicate with a phone system, either a CTI server (Third Party Solution) or the connection of the phone set to the PC (First Party Solution) is supported. For both systems a **TAPI driver 2.x (also referred to as TSP)** is mandatory. See details for TAPI - [Where do I find the TAPI driver?](#)¹⁴²

If you are using a modem, we strongly recommend switching to a phone set connected to the PC (via USB/serial), because the TAPI drivers of modems often do offer only basic functions or do not function at all.

ISDN phones without a PBX are available with an inbuilt TAPI driver.

VOIP systems like Cisco Call Manager, Avaya, Swyx or Innovaphone normally have a TAPI driver included.

Some SIP phones offer TAPI support, e.g. Global IP Telecommunications Ltd (Ninja) www.globalipphones.com

Please check firstly with your phone vendor about which solution meets your requirements and how you can install and configure the TAPI driver. You can contact Support@mirage-systems.de if you do have the TAPI driver installed and CTI Data Connector for Salesforce has problems with making an outgoing call or receiving incoming calls.

Operating System

Windows XP to Windows 7 (32bit and 64 bit) is supported. Every Windows System (especially XP) needs the latest service pack.

Some TAPI drivers do not work on **64bit operating** systems. You can use a virtual machine with 32bit operating system. An example, how this is working is explained for [MAC OS X](#).¹⁵¹ For Windows Vista or Windows 7 64bit, the same virtual machines can be used.

Salesforce

The Salesforce *Professional*, *Enterprise*, *Unlimited* or *Developer Edition* is required for the call center functionality. If you are using the *Team Edition*, contact Support@mirage-systems.de for an alternative solution.

See also

[Configure](#)^[56] the TAPI driver within CTI Data Connector for Salesforce
[Where do I find the TAPI driver?](#)^[142]

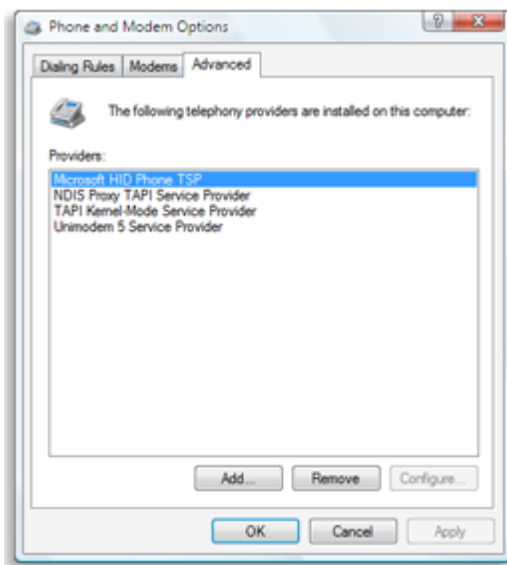
9.2.4 Where do I find the TAPI driver?

Telephony Application Programming Interface (TAPI) is a programming interface for CTI (computer telephony integration) applications.

Applications using TAPI need a **TAPI driver (also referred to as TSP)**. This TAPI driver has to be delivered by the **phone manufacturer**. As this driver is always device-dependent, it is not possible to use a generic driver which is supplied with the operating system. The driver often has the name of the manufacturer or the phone system, sometimes in combination with the extension number.

To check whether a TAPI driver is installed, do the following (Instructions for Windows XP).

- Start, Control Panel
- Phone and Modem options
- TAB **advanced**



There are a lot of drivers which come with Windows like *NDIS Proxy TAPI Service Provider*. Search for a driver with the name of the **PBX, PBX vendor or your direct line**. If this driver is missing, you probably do not have the correct TAPI driver for your PBX.



If your TAPI driver is not listed here see: [I cannot select my TAPI driver in the configuration wizard](#)^[172]

See also

[System Requirements](#)^[141] TAPI driver
[Configure](#)^[56] the TAPI driver within CTI Data Connector for Salesforce

9.2.5 I cannot select my TAPI driver in the configuration wizard

If you cannot select the TAPI driver in the [configuration wizard](#)^[56] (it does not appear in the list), then check:

Step 1: Phone and Modem options

Is the TAPI driver visible in [Phone and Modem options](#)^[142]? Typically you see either the name of the PBX or your extension number.

If the TAPI driver is not visible here, install it again and reboot the system.

If the TAPI driver is listed here, continue with step 2

Step 2: Configure the TAPI driver

Some TAPI drivers have to be configured, e.g. you have to add the IP address where to find the PBX or add a user name and password. This is done in [Phone and Modem options](#)^[142]. Select your driver and click on the button: *Configure*.

Check again if the TAPI driver can be selected in the [configuration wizard](#)^[56]

If it is still missing, continue with step 3

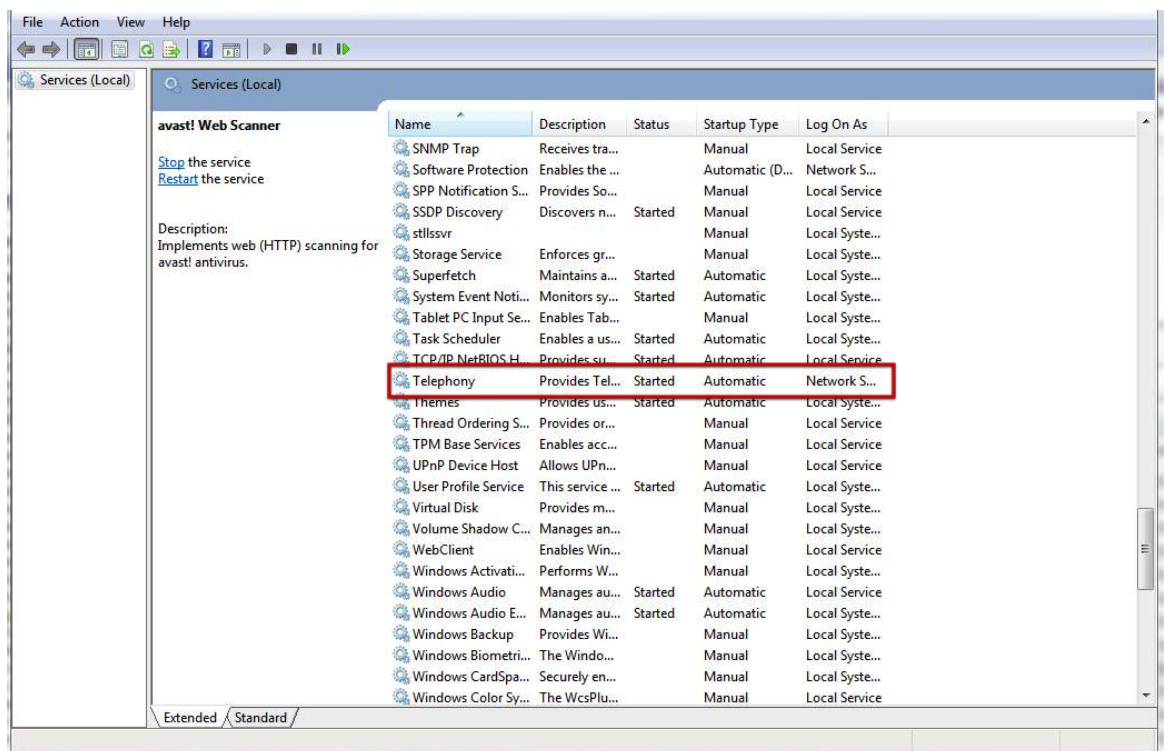
Step 3: Start telephony service

If you are running windows 7, then some TAPI drivers require the telephony service.

Go to *Administrative Tools* in the Control Panel and click **Services**

Change the *startup type* of the Telephony service to **automatic** and reboot the system. If the TAPI driver is still not visible in the configuration wizard, there is a setup problem with

the TAPI driver. Contact the PBX vendor

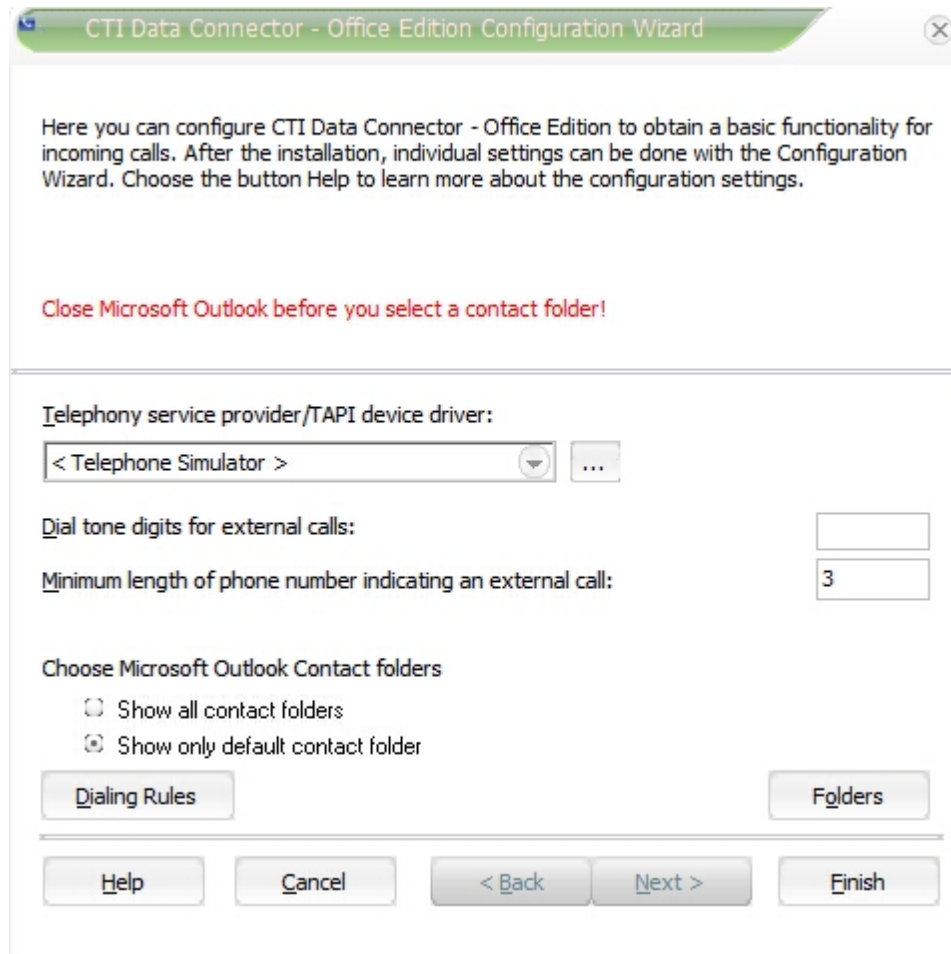


9.2.6 Minimum Configuration Settings

During installation, the [Configuration Wizard](#)^[53] was already started. You can define a lot of individual configuration settings there. The following settings **have to be defined** to guarantee a basic functionality.

- [TAPI device driver](#)^[56] - it is delivered by the telephone manufacturer. See also: [System requirements - TAPI driver](#)^[141]
- Prefix for [external calls](#)^[71] and the [minimum length](#)^[72] of a phone number indicating an external call
- Button [Dialing Rules](#)^[72] - configures country settings and area code. See also special [configuration for US / Canada](#)^[73]
- The option: *Show all contact folders* allows to use the public and private contact folders for caller identification. The option: *Show only default contact folder* displays only private contact folders.
- Button Folder - Select Microsoft Outlook™ contact folder for caller identification. You have to close Outlook before you can select the contact folders.

Just by setting this minimum configuration you will be able to make outgoing calls and to identify incoming calls. The Configuration Wizard can be started any time by **right** click on the [icon](#)^[22], option [Configuration Wizard](#)^[53].



See also

[Where do I find the TAPI driver?](#)^[142]
[System requirements - TAPI driver](#)^[141]

9.2.7 Troubleshooting - Outgoing calls

If outgoing calls do not always or never work, then first perform the following checks:

- [Errors - Call Center Adapter](#)^[146]
- [I cannot select my TAPI driver in the configuration wizard](#)^[172]
- [Necessary configuration settings for outgoing calls](#)^[31]

- [Outgoing call - never possible](#)^[175]
- [Outgoing call - dials wrong number / prefix](#)^[176]
- [Outgoing call - Dial with Hyperlink not working](#)^[177]
- [Outgoing call - Postfix like # necessary](#)^[178]
- [Outgoing call - problem with Internal Number](#)^[178]
- [Outgoing call - Hotkey is not working](#)^[178]

If the problem cannot be located, CTI Data Connector for Salesforce can log all events coming from the TAPI driver. Often wrong implementations of the TAPI driver or functions not implemented like call transferring are causing problems. Our support team can analyze the log file.

To send us a log file - see [How do I send a log file?](#)^[185]

9.2.7.1 Necessary configuration settings for outgoing calls

Below find a list of configuration settings which have an impact on outgoing calls. If outgoing calls are not working, check these settings and also check [Troubleshooting - Outgoing calls](#)^[174].

Configuration Settings

- Select correct [TAPI driver](#)^[56]
- [PBX Configuration](#)^[71] - especially dial tone digits for external calls
- [Dialing Rules](#)^[72] - for US / Canada check [additional settings](#)^[73]
- TAPI Configuration - [Prefix Outgoing Calls](#)^[62]
- TAPI Configuration - [Provider Postfix](#)^[63]
- TAPI Configuration - [Ignore Fake Number](#)^[63]
- [Dial via Hotkey](#)^[34] - [configure](#)^[58] Hotkey and [activate this option](#)^[55]
- [Dial within Browser](#)^[35] - [activate this option](#)^[55]
- [Dial with a Hyperlink](#)^[187] - [activate this option](#)^[55]

If **internal** numbers are not dialled correct, check:

- TAPI Configuration - [Prefix internal number](#)^[63]
- [Minimum length](#)^[72] of phone number indicating an external call

9.2.7.2 Outgoing Call - never possible

If you are not able to make an outgoing call, perform the following checks:

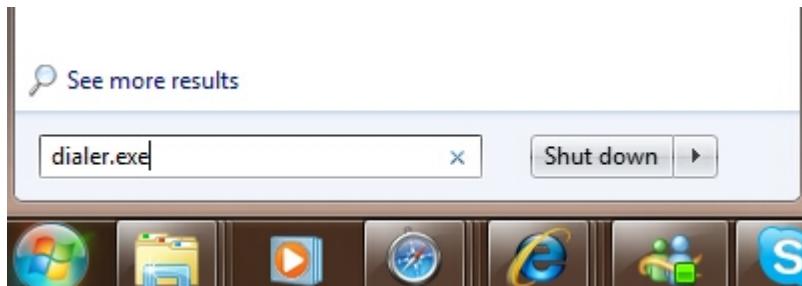
- Start the [Configuration Wizard](#)^[53]
- Browse to the page where you can select the [TAPI driver](#)^[56] and select the correct TAPI driver. See also [Where do I find the TAPI driver?](#)^[142]
- Press button *Finish*
- Select Quick dialing

- Type in a phone number and select *Dial*

If the number is dialed but with a **wrong prefix** (a wrong number is placed in front or numbers are missing), check solution [Outgoing Call - wrong Prefix](#)^[176].

If dialing works with Quick dialing but you can not dial with a [Hotkey](#)^[34], [change the Hotkey](#)^[58] within the Configuration Wizard.

If outgoing calls are still not working, make a test with Windows Phone Dialer. Select in Windows: *Start, Run: Dialer.exe*



You can select and configure the TAPI driver in this application and make a phone call.

If outgoing calls are not working with the Phone Dialer, the reason for the problem is the TAPI driver. Contact your phone vendor.

If outgoing calls are working with the Phone Dialer, [send us a log file](#)^[185].

9.2.7.3 Outgoing Call - wrong Prefix

If outgoing calls are working, but the **prefix is wrong** (a wrong number is placed in front or numbers are missing) **or the number has a wrong format**, perform the following checks:

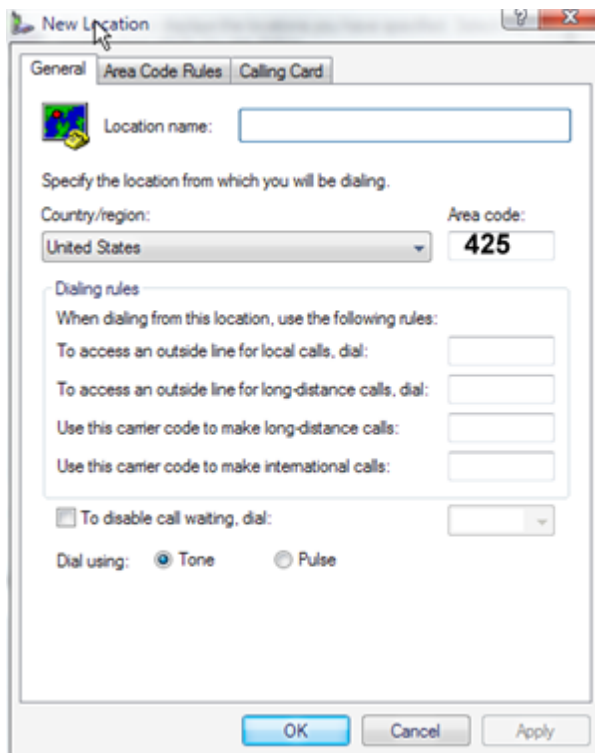
- Start the [Configuration Wizard](#)^[53]
- Browse to the page [PBX Configuration](#)^[71]
- Select button [dialing Rules](#)^[72].
- Select your location and press *Edit*
- The Country/Region setting is important. Select your **country** and enter the Area code **without** any prefix like 0 or 1
- DO NOT use dialing rules - they are only supported for US / Canada - see [dialing Rules for US / Canada](#)^[73]
- Check the [Dial tone digits for external calls](#)^[72]. This is the number to get an outside line, normally 0 or 9.
- Enter the [Minimum length of phone number indicating an external call](#)^[71]. If the maximum INTERNAL phone number has a length of 3 digits, you have to enter 4 here
- Activate the Desktop Notification for **outgoing** calls to get each call signaled
- Press button *Finish*
- Select Quick dialing

- Type in a phone number and select *Dial*

If the number is dialed correctly but **no caller data is displayed**, try to cut a prefix for an outside line, e.g. 9 or 0. This can be configured within Expert Settings, [TAPI configuration](#) [62]. Do also check the option [Ignore Fake Numbers](#) [63].

If the number is still wrong, try other settings.

If dialing still does not work, [send us a log file](#) [185].



9.2.7.4 Outgoing Call - Dial with Hyperlink not working

Dialing with an hyperlink is supported in all Browsers. You have to activate this function within the Configuration Wizard - see [Configure dial options for Browsers](#) [59]. Make sure that you have disabled the feature in Skype. See also: *Expert Settings, Miscellaneous Settings*, [Application to dial with Hyperlink](#) [69].

To dial via an hyperlink in a Browser based application, just insert the following command in your application:

Click to Dial

where phonenumber has to be replaced with the real phone number like

Click to Dial

9.2.7.5 Outgoing Call - Postfix like # necessary

If a character like # has to be added **after** each phone number (postfix), configure this option in Expert Settings, [TAPI Driver](#).^[63]

9.2.7.6 Outgoing Call - problem with Internal Number

Check the following configuration settings:

- [Minimum length of phone number indication an external call](#)^[71] - this is the main configuration setting to determine if a call is internal or external
- Activate the Desktop Notification window for **outgoing** calls to get each call signaled
- The configuration option: [Don't show internal calls](#)^[76] must be **unchecked** to trace the call in the Desktop Notification window
- If the internal number is e.g. signaled with 12 but the number stored in the database is 07342/7383-12, see in [Prefix for Internal Numbers](#)^[63] how to add the company number and area code

9.2.7.7 Outgoing Call - Hotkey is not working

If you try to dial with a [Hotkey](#)^[34], and nothing happens, perform the following checks:

Firstly check if you can dial with the Quick dialing option. If this is also not possible (the phone does not dial anything), check [Outgoing Call - never possible](#)^[175].

If the phone dials, the Hotkey settings have to be modified:

- Try a Hotkey which is not used like CTRL+SHIFT+F10 - [change the Hotkey here](#)^[58]
- Especially in case the Hotkey is sometimes working and sometimes not, increase the Clipboard waiting time in increments of 10 - [change the waiting time here](#)^[59]

9.2.8 Troubleshooting - Incoming calls

If incoming calls do not always or never work, firstly perform the following checks:

- [Errors - Call Center Adapter](#)^[146]
- [I cannot select my TAPI driver in the configuration wizard](#)^[172]
- [Necessary configuration settings for caller identification](#)^[42]
- [Incoming call - never signalled](#)^[179]
- [Incoming call - wrong prefix](#)^[180]
- [Incoming call - Caller Identification not working](#)^[180]
- [Incoming call - use address data stored in PBX](#)^[181]

- [Incoming call - problem with Internal Number](#)^[181]

If the problem cannot be located, CTI Data Connector for Salesforce can log all events coming from the TAPI driver. Often wrong implementations of the TAPI driver or functions not implemented like call transferring are causing problems. Our support team can analyze the log file.

To send us a log file - see [How do I send a log file?](#)^[185]

9.2.8.1 Necessary configuration settings for caller identification

Below is a list of configuration settings which have an impact on the caller identification. If the caller identification is not working, check these settings and also check [Troubleshooting - Incoming calls](#)^[178].

Address information used for caller identification

Salesforce Lead, Account, Contact

- Addresses stored in the [PBX system](#)^[77]

Configuration Settings

- Select correct [TAPI driver](#)^[56]
- [Configuration Caller Identification](#)^[76]
- TAPI Configuration - [truncate incoming phone number at](#)^[63]
- TAPI Configuration - [Prefix incoming call](#)^[62]
- TAPI Configuration - [Don't signal updated phone number during a call](#)^[64]

If **internal** numbers are not identified correct, check:

- TAPI Configuration - [Prefix internal number](#)^[63]
- [Minimum length](#)^[72] of phone number indicating an external call

9.2.8.2 Incoming Call - never signalled

If an incoming call is **never** signalled, perform the following checks:

- Start the [Configuration Wizard](#)^[53]
- Browse to the page where you can select the [TAPI driver](#)^[56] and select the correct TAPI driver. See also [Where do I find the TAPI driver?](#)^[142]
- Activate the Desktop Notification window for incoming calls to get each call signaled
- Press button *Finish*
- Call with your mobile phone and make sure that you **do not suppress the phone number** from your mobile

If the number is signalled but with a **wrong prefix**, check the solution [Incoming Call - wrong Prefix](#)^[180]

If incoming calls still do not work, [send us a log file](#)^[185].

See also

[Incoming call - wrong address information is displayed](#)^[181]

9.2.8.3 Incoming Call - wrong Prefix

If the number of an incoming call is signaled but with a wrong prefix (e.g. **0070054885342**), try to cut a prefix e.g. 9 or 0.

If the leading 0 is missing (e.g. 70054885342), add 0 for incoming calls.

This can be configured within Expert Settings, [TAPI configuration](#)^[62].

9.2.8.4 Incoming Call - Caller Identification not working

If the number of an incoming call is signaled, but the caller can not be identified, firstly perform the following checks:

- If you get the wrong caller signalled, change the value for [Caller Identification - truncate number of digits](#)^[76] to a value between 1 to 3
- Make sure that the number is stored in your database or MS-Outlook
- If you are using MS-Outlook / Exchange, make sure you have the right Outlook folder selected
- If you are using a single user installation, firstly perform [Format Phone Numbers](#)^[82]
- If you have your address information stored in the PBX, check [Incoming Call - use address data from PBX](#)^[181]
- If you are using a network installation, either test with a number stored in MS-Outlook or have the administrator perform the [synchronization of the the phone numbers on the server](#)^[83]
- If the number is signaled with a wrong prefix (e.g. **0070054885342**), check [Incoming Call - wrong Prefix](#)^[180]
- If the number is signaled with additional characters (e.g. **070054885342@xy.com**), truncate the incoming phone number at the @ sign - check Expert Settings, [TAPI Configuration](#)^[62]
- If only internal calls are not identified, check [Incoming Call - problem with Internal Number](#)^[181]

9.2.8.5 Incoming Call - use address data stored in PBX

If the address data is stored in the PBX or phone, this data can be used additionally for caller identification. Enable [Display Caller ID Name identified by PBX.](#)^[77]

9.2.8.6 Incoming Call - wrong address information is displayed

If you often get into the situation that multiple addresses are displayed in combination with the text *Caller could not be identified exactly*, this is due to the feature of truncating phone numbers. Reduce the number of digits which are truncated - see settings *Caller Identification* [truncate number of digits](#)^[76]

- In Europe - use either 3 or 2
- In USA / Canada - always use 0

9.2.8.7 Incoming Call - problem with Internal Number

Check the following configuration settings:

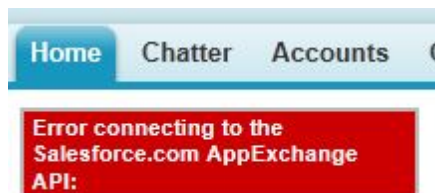
- [Minimum length of phone number indication an external call](#)^[71] - this is the main configuration setting to determine if a call is internal or external
- Activate the Desktop Notification window for **incoming** calls to get each call signaled
- The configuration option: [Don't show internal calls](#)^[76] must be unchecked
- If the internal number is e.g. signaled with 12 but the number stored in the database is 07342/7383-12, see in [Prefix for Internal Numbers](#)^[63] how to add the company number and area code

9.2.9 Errors - Call Center Adapter

Error Messages

The following errors could occur. **After changing a configuration setting always logout from salesforce.**

- ❑ Red error box: Error connecting to the salesforce.com AppExchange API - the SoftPhone does not load



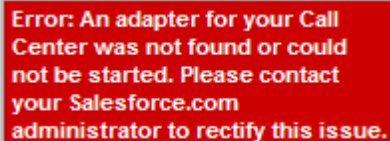
If you get this error, contact salesforce support to enable the API. The API is disabled by default in a test account and also in the Professional Edition.

Note: The API is not required if you install CTI Data Connector for Salesforce version

3.0.5 (released 2/2012). Contact support@mirage-systems.de to get this update.

If you are using Enterprise Edition or higher see: [API is not enabled for this Organization or Partner](#)^[147]

- ❑ Red error box: An Adapter for your Call Center was not found or could not be started. Please contact your Salesforce.com administrator to rectify this issue



The error message indicates, that the Salesforce Adapter DLL could not be registered

- In case you installed a call center adapter from other vendors **uninstall** it and **delete the adapter within salesforce**
- Quit CTI Data Connector for Salesforce ([blue icon](#)^[24], right mouse click, Quit)
- Install CTI Data Connector for Salesforce again using **Windows Administrator** credentials
- If the error persists send us a [log file](#)^[150]

- ❑ Red error box: API is not enabled for this Organization or Partner

If you are using Professional Edition or a test account see: [Error connecting to the salesforce.com AppExchange API - the SoftPhone does not load](#)^[147]

Note: The API is not required if you install CTI Data Connector for Salesforce version 3.0.6 (released 1/2012). Contact support@mirage-systems.de to get this update.

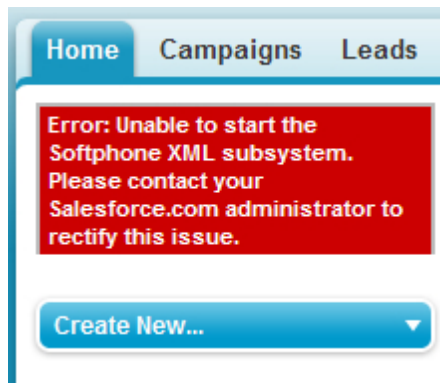
If you are using Enterprise Edition or higher, check the **profile** (Setup, Administration Setup, Manage Users, Profiles) which is associated to the user. There is an option: **API Enabled**. This must be checked. Also verify if the option: **Call Center** is checked with the option *Visible*

- ❑ Red error box: Unable to start the salesforce.com Office Toolkit

DLLs have not been registered properly. Install CTI Data Connector for Salesforce again using **Windows Administrator** credentials

Note for Administrators: The file **SF_MSApi4.dll** is not registered. It is in the folder c:\program files\CTI Data Connector for salesforce 3.0\call center adapter and can be manually registered using regsvr32

- ❑ Red error box: Unable to start the softphone XML subsystem



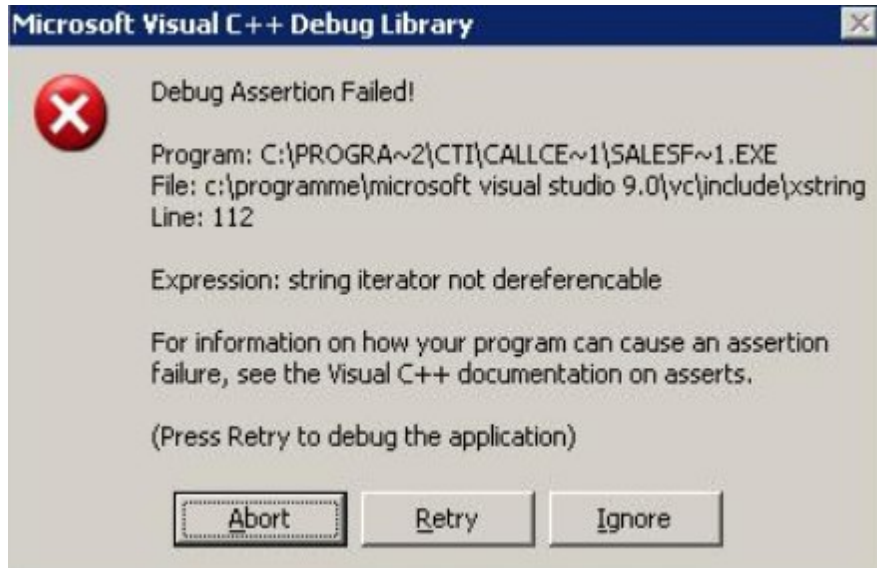
This error means that the XML subsystem, MSXML6, has not been installed or properly registered. Search "Unable to start the Softphone XML subsystem." in Salesforce.com Help & Training for troubleshooting steps.

- [Download MSXML6 Parser](#) .Restart Windows after installation

Note for Administrators: The file **msxml6.dll** is missing or not registered. It is in the folder c:\windows\system32 and can be manually registered using regsvr32

Microsoft Visual C++ Debug Library

Error Message



The error message indicates, that different versions of the Salesforce Adapter DLL are installed

- In case you installed a call center adapter from other vendors **uninstall** it and **delete**



the adapter within salesforce


- Quit CTI Data Connector for Salesforce ([blue icon](#)¹²⁴), right mouse click, Quit)
- Install CTI Data Connector for Salesforce again using **Windows Administrator** credentials
- If the error persists send us a [log file](#)¹⁵⁰

- ☐ The SoftPhone does not load in Firefox or Safari

[See Browser Support](#)⁹⁹

- ☐ Phone icon is grey

Right to the phone number there is a **grey** icon  instead of a green  icon or the text: *click to dial disabled* is displayed when you click on a phone number

Check if the red salesforce icon  is visible See also System Tray icon.

- ☐ The icon is NOT visible


If the icon is not visible quit CTI Data Connector for Salesforce and start it again. If the icon is still not visible

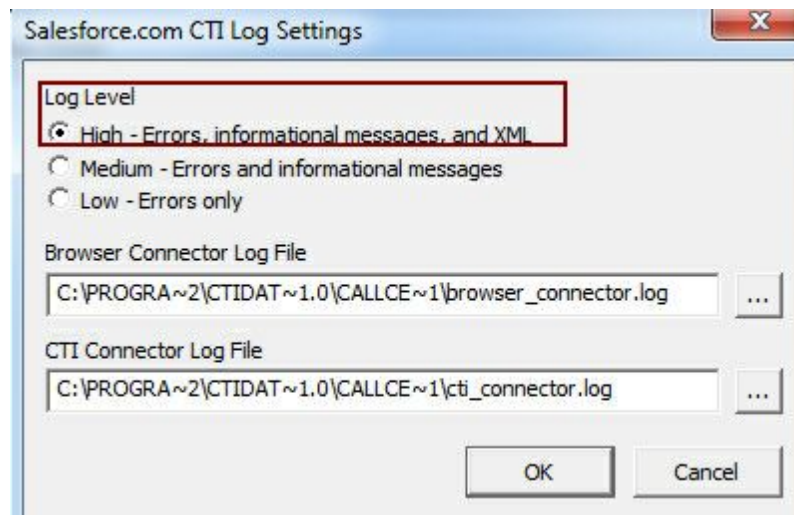
- Check if an error in a [red box appears](#)¹⁴⁷
- If there is no error message, install CTI Data Connector for Salesforce again using **Windows Administrator** credentials
- If the error persists send us a [log file](#)¹⁵⁰

- ☐ The icon is visible

- Check if you get an [API error](#)¹⁴⁷
- If the error persists send us a [log file](#)¹⁵⁰

In case an error cannot be solved, send us a log file

- Right click on the red salesforce icon . Then select **Logging....** See also System Tray icon.
- Check **High** - Errors, informational messages, and XML



- Quit CTI Data Connector for Salesforce ([blue icon](#)^[24], right mouse click, Quit) and **start it again**
- Send both log files (browser_connector.log and cti_connector.log) to Support@mirage-systems.de. You find the files in the folder 3.0\call center adapter.

The integration in salesforce requires one of the following salesforce editions:
Professional, Enterprise, Unlimited oder Developer Edition.

9.2.10 How do I send a log file?

If a problem can not be located, CTI Data Connector for Salesforce can log all events coming from the TAPI driver. Often wrong implementations of the TAPI driver or functions not implemented like call transferring are causing problems. Our support team can analyze the log file.

To send us a log file, perform the following steps:

- Start the Configuration Wizard (CTI Data Connector for Salesforce icon, right mouse click, Configuration Wizard)
- Browse to step 1 (depending on the program version this can be another page) and select the Button [Expert Settings](#)^[60]
- Check **Activate call logging**
- Press button *OK*, then button *Finish*
- CTI Data Connector for Salesforce starts. Now perform the operation **that is not working correctly**, e.g. make an incoming call with your mobile phone
- Everything is now logged into a file
- Start the Configuration Wizard (CTI Data Connector for Salesforce icon, right mouse click, Configuration Wizard)

- Browse to step 1 (depending on the program version this can be another page) and select the Button [Expert Settings](#)^[60]
- Press the button **Send Log File**. Your e-mail client opens. Add a detailed description of the problem and the exact phone numbers which do not work. Send the e-mail.
- **Uncheck** *Activate call logging*
- Press button *OK*, then button *Finish*

9.2.11 Special requirements for Access database in a network environment

If an Access Database is used in a network environment, it could never be backed up as long as CTI Data Connector for Salesforce is running.

Enable the configuration option: [Terminate database connection after each call](#)^[68] on each client PC and **disable this option on the server** which performs the [phone number formatting](#)^[83].

9.2.12 How to use the Called ID (my number) for caller identification?

By default, the phone number of the person who is calling (CallerID) is used for caller identification. If the number which was called (Called ID) should be used, select the option [Use Called ID for caller identification](#)^[76].

9.2.13 How can I suppress the notification of internal calls?

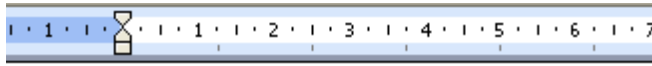
By default, internal calls are signalled. Check the configuration option: [Don't show internal calls](#)^[76]

9.2.14 How can I dial with an Hotkey?

In nearly any application a phone number can be **highlighted** and dialed using the Hotkey defined in the [configuration settings](#)^[58]. **The default value is the key F10.**

Highlight the phone number within the Web Browser by pressing down the left mouse key and dragging the mouse cursor to the right. When reaching the end of the phone number, release the left mouse button and press F10.

In the example below a phone number has been highlighted. It can be dialed using the defined Hotkey.



United Whiskey Destilleries Ltd.
 Freemont Tower
 3 Perkins Bridge
 Windsor
 SL44QQ
 United Kingdom

Phone: ++44734273833

See also

[Troubleshooting - Hotkey is not working](#) ¹⁷⁸

Configuration - [Hotkey to dial with a highlighted phone number](#) ⁵⁸

Configuration - [Activate dialing via Hotkey](#) ⁵⁵

9.2.15 How can I dial with an Hyperlink?

You can dial with a Hyperlink in Browser applications. To use this functionality, the application has to be modified. Dialing via Hyperlink allows to dialing just with a click.

To dial via a hyperlink in a Browser based application, just insert the following command in your application:

```
<a href="callto://phonenummer">phonenummer</a>
```

where phonenummer has to be replaced by the real phone number like

```
<a href="callto://+4970054885342">+4970054885342</a>
```

It is displayed on the screen as follows: +4970054885342

To enable dialing via hyperlink open the Configuration Wizard and check [Activate dialing via Hyperlink](#) ⁵⁵.



This function is available in all Browsers (e.g. Internet Explorer or Firefox).

See also

[Enable Dial with a Hyperlink](#) ⁵⁹

[Troubleshooting - Dial with a Hyperlink is not working](#) ¹⁷⁷

Configuration - [Application used for dialing with Hyperlink](#) ⁵⁸

9.2.16 How can I speed up dialling?

Often dialling of a phone number can be accelerated by using an additional character - especially when using an IP phone or software.

The configuration of the additional character (e.g. #) can be done in the Configuration Wizard, Expert Settings, [Provider Postfix](#) ⁶³.

9.2.17 How can I check my version number?

Right mouse click on the icon and select Open CTI Data Connector for Salesforce. Select menu ?, **About CTI Data Connector for Salesforce**. You will find the detailed version number there.

To check for the latest updates, select menu ?, **Software Service**.

9.2.18 How do I uninstall CTI Data Connector for Salesforce

To uninstall CTI Data Connector for Salesforce

- Select Start, Control Panel
- Add/Remove Programs

Search for CTI Data Connector for Salesforce 3.0 and select Remove.

9.2.19 I found no answer for my questions

If you did not find an answer for your questions in the tutorial search in the extensive Online Knowledge Base.

[Browse Online Knowledge Base](#)

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