



## **Broadsoft Unified Connector and Salesforce Call Center Setup Guide**

February 20, 2009

# **Broadsoft Unified Connector and Salesforce Call Center Setup Guide Version 2.0**

## **1. Announcement**

The BroadSoft Unified Connector for Salesforce, Salesforce users can now fully integrate with a RevealTEL phone system. This lets enterprises use their carrier-grade VoIP calling features – such as call control, call hold and call transfer – in conjunction with their CRM features in Salesforce. Also, BroadWorks end-users can automatically capture and manage a detailed log of all calls from within Salesforce to track interactions with customers. The integration automatically opens a caller's contact record when the user receives an incoming call.

The Broadsoft-Salesforce integration is available to all RevealTEL Broadsoft enterprise and IPTrunking users as a value added service for no additional charge. Please use the Broadsoft-Salesforce Setup Guide for installation instructions specific to RevealTEL users.

Please note that BroadSoft provides a disclaimer that they do not offer a service level agreement (SLA) or other guarantees for this application. The application plug-in is available at no additional charge for all enterprises with at least one (1) premium seat and for all IPTrunking Enterprises with at least one (1) IPTrunking Premium User.

## **2. System Requirements**

- Internet Explorer 6.0 or higher
- Windows XP or Vista
- 256 MB of RAM (512 MB recommended)
- 20 MB disk space minimum
- P2 500 Mhz processor or above

### 3. Salesforce Call Center/Broadsoft Setup Guide

Salesforce Call Center improves the productivity of your call center users by providing fast and easy access to accounts, contacts, cases, and other Salesforce objects that are directly related to incoming calls. By embedding a SoftPhone within the Salesforce user interface, Salesforce Call Center allows your users to perform all the functions of their job from a single application


#### 3.1 Installing the CTI Adapter – Broadsoft Unified Connector

Broadsoft users must download and install the Broadsoft Unified Connector (CTI Adapter) in order to use the call control features of your Broadsoft account with the Salesforce Call Center.

Download MSI at <ftp://ftp.dslbroadband.com/pub/BroadWorks/>


#### 3.2 Installing the trial version of Salesforce.com (Optional)

You can obtain a free 30-day trial version of Salesforce.com. Go to URL: [www.salesforce.com](http://www.salesforce.com) and click on 30 day free trial.



## Why is Salesforce #1 in On-Demand CRM? It Works.

### Sign up to View the Salesforce CRM Demo Now



Salesforce CRM enables businesses of any size to manage every aspect of the customer lifecycle

View the CRM Demo to learn about Salesforce's features such as:

- Point-and-click **customization**
- Real-time** analytics
- Instant** global deployment
- Award-winning **ease of use**

Fill in the form to view the Salesforce CRM Demo.

First Name: \*

Last Name: \*

Job Title: \*

E-mail: \*

Phone: \*

Company: \*

Country: \* -- Select One --

State: \* -- US/Canada Only --

Employees: \* -- Select One --

Product Interest: \* (please check all that apply)

☐ Sales

☐ Call Center

☐ Marketing


☐ PRM


☐ AppExchange

☐ Apex Development

**View Demo**

\* These fields are required

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Salesforce for 30 days

## 4.3 Creating a Call Center

1. In Salesforce, click **Setup** | **Customize** | **Call Center** | **Call Center**

The screenshot shows the Salesforce CRM interface. The top navigation bar includes links for Setup, System Log, Help & Training, and Logout, along with a '26 Days Remaining' warning and a 'Subscribe Now!' button. The main navigation menu on the left lists various setup categories: Personal Setup (My Personal Information, Email, Import, Desktop Integration, Call Center Settings) and App Setup (Customize, Tab Names and Labels, Home, Activities, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Cases, Self-Service, Call Center). The 'Call Center' sub-menu is expanded, showing 'Call Centers', 'Directory Numbers', and 'SoftPhone Layouts'. The main content area is titled 'Call Center' and contains two sections: 'Call Center' with links to 'Manage call centers' and 'Manage directory numbers', and 'Getting Started' with a link to 'Getting Started with Setting Up Call Centers'.

2. If the Introducing Salesforce Call Center splash page appears, click **Continue**, at the bottom left side of the page.

3. Click **Import**.

The screenshot shows the Salesforce CRM interface with the 'All Call Centers' page. The top navigation bar is the same as the previous screenshot. The main navigation menu on the left is the same, with the 'Call Center' sub-menu expanded. The main content area is titled 'All Call Centers' and includes a 'Help for this Page' link. Below the title, there is a text block explaining that a call center corresponds to a single computer-telephony integration (CTI) system already in place at the organization, and that Salesforce users must be assigned to a call center before they can use any Call Center features. Below this text, there is a table with columns for 'Name', 'Created Date', and 'Last Modified Date'. The table is currently empty, and a message 'Data not available for this view.' is displayed. An 'Import' button is located above the table.

4. Next to the **Call Center Definition File** field, click **Browse** to navigate to the file: **BroadWorksCCEnterprise.xml** (Default location: **C:\Program Files\Broadsoft Unified Connector\bin**)

5. Click **Open** to enter the path in the **Call Center Definition File** field.

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**Call Center Import** [Help for this Page](#)

To create your first call center record for a CTI adapter that was just installed, import the adapter's default XML call center definition file into Salesforce. The call center definition file is located in the adapter's installation directory, and is typically named after the type of CTI system that the adapter supports (for example, "CiscoPCCEnterprise7x.xml"). [View sample definition file](#)

Import Cancel

**New Call Center Import Information** [? = Required Information](#)

Call Center Definition File  [Browse...](#)

Import Cancel

6. Click **Import**.

7. Click **Edit**

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**Call Center BroadSoft Unified Connector** [Help for this Page](#)

All Call Centers » BroadSoft Unified Connector

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

**General Information**

Internal Name	BroadSoftUnifiedConnector
Display Name	BroadSoft Unified Connector
Description	BroadSoft Unified Connector
CTI Connector Progid	BroadSoftUC.CTIBase.1

**Dialing Options**

Long Distance Prefix	1
International Prefix	011
Phone System Server Address	input server address here
Phone System Server Port	2208

**Call Center Users** [Manage Call Center Users](#) [Call Center Users Help](#)

**Call Center Users by Profile**

Total	0
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8. Enter [www.mastervoip.us](http://www.mastervoip.us) for the **Phone System Server Address** under Dialing Options

**Call Center Edit**  
BroadSoft Unified Connector

All Call Centers » BroadSoft Unified Connector

**Call Center Edit** [Save] [Cancel]

**General Information** [Required Information]

Internal Name: BroadSoftUnifiedConnecto  
Display Name: BroadSoft Unified Connect  
Description: BroadSoft Unified Connect  
CTI Connector ProgId: BroadSoftUC.CTIBase.1

**Dialing Options**

Long Distance Prefix: 1  
International Prefix: 011  
Phone System Server Address: [Highlighted]  
Phone System Server Port: 2208

[Save] [Cancel]

## 4.4 Assigning Users to the Call Center

### 1. Click Manage Call Center Users

**Call Center**  
BroadSoft Unified Connector

All Call Centers » BroadSoft Unified Connector

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

**General Information**

Internal Name: BroadSoftUnifiedConnector  
Display Name: BroadSoft Unified Connector  
Description: BroadSoft Unified Connector  
CTI Connector ProgId: BroadSoftUC.CTIBase.1

**Dialing Options**

Long Distance Prefix: 1  
International Prefix: 011  
Phone System Server Address: input server address here  
Phone System Server Port: 2208

**Call Center Users** [Manage Call Center Users] [Call Center Users Help]

**Call Center Users by Profile**

Total: 0

### 3. Click Add More Users

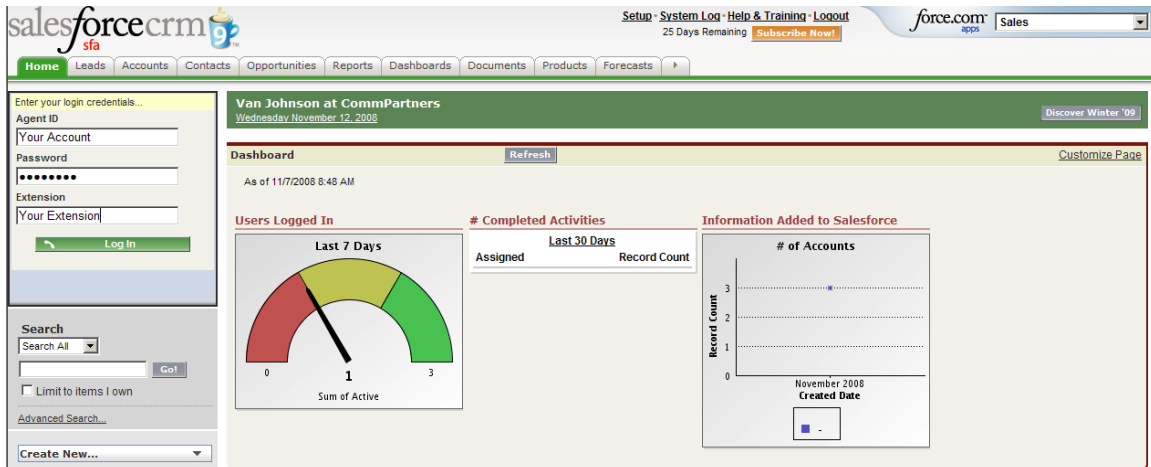
4. Select criteria to find the users who should be assigned to the call center, or

5. Click **Find** to retrieve all users not already assigned to a call center (users can only be assigned to one call center at a time)

6. Select the check box next to each user you want to assign to the call center

7. Click **Add to Call Center**

8. Click **Home** to launch Broadsoft Connector



**4.5 Customizing a Call Center Directory – See Salesforce Help**

**4.6 Customizing SoftPhone Layouts – See Salesforce Help**