

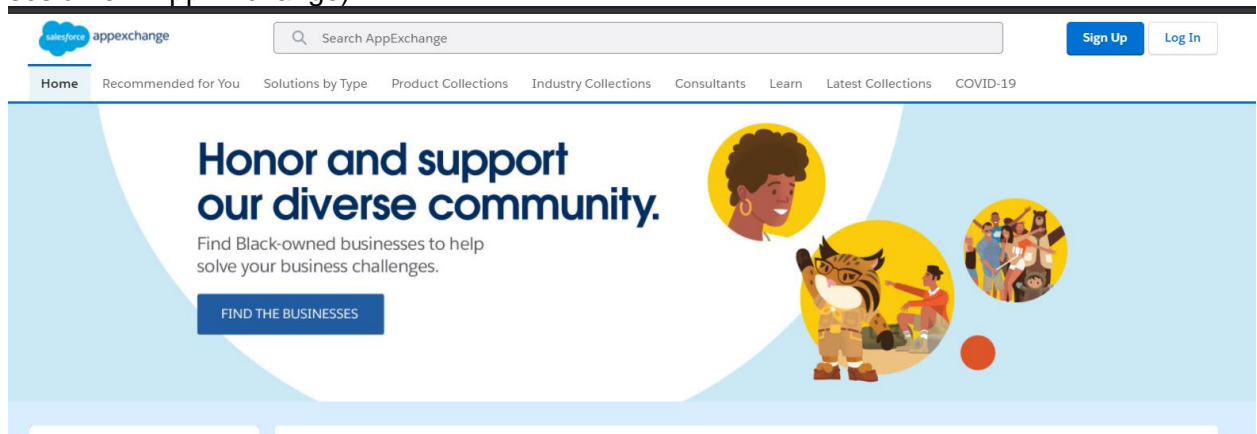
## Integración **net2phone** - Salesforce

Con esta integración su organización puede actualizar rápida y fácilmente los registros de Salesforce con solo un par de clics.

- Mantenga un registro de los detalles importantes, con registros completos de llamadas integrados automáticamente en Salesforce
- Capture métricas precisas: mantener registros precisos significa que puede tener confianza en las métricas que son importantes para su negocio.
- Personalice las actividades de las llamadas: la captura de los resultados personalizados de sus llamadas garantiza que la aplicación se adapte a sus requisitos comerciales.

### 1. Instale la integración de **net2phone**

- Busque "net2phone for Salesforce" en [AppExchange](#) . (Asegurese de haber iniciado sesión en App Exchange)



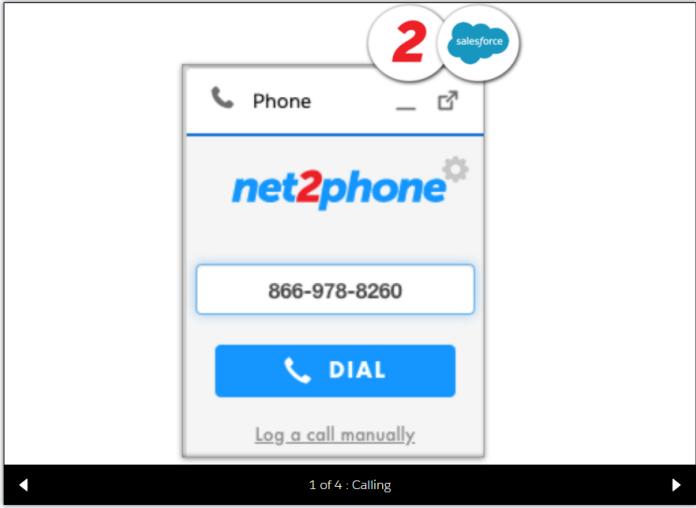
- Haga Clic en en el icono de **net2phone**

LISTING	LATEST RELEASE	RATING	PRICE
 net2phone for Salesforce	2/22/2021	★★★★★ (0)	Paid

- Clic en "Get it Now".

< SEARCH RESULTS | ALL APPS > SALES > PRODUCTIVITY

net2phone for Salesforce By net2phone (Partner Main\*)



1 of 4 · Calling

[Get It Now](#)

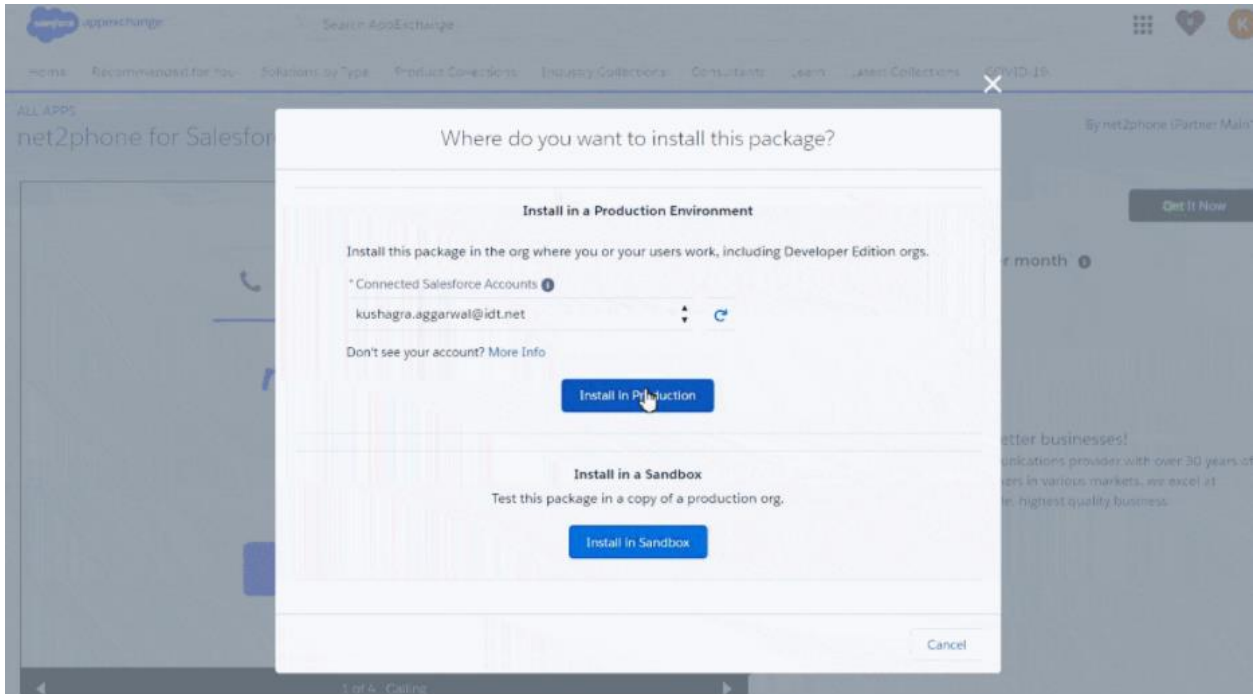
**Starting at \$2 USD per user per month**

RATING: ★★★★★ (0)      CATEGORIES: **Productivity**

LATEST RELEASE: 2/22/2021

Smarter conversations create better businesses!  
net2phone is a leading Unified Communications provider with over 30 years of telecom innovation. Trusted by customers in various markets, we excel at providing the most efficient and reliable, highest quality business communication services.

- Clic en instalar en “Production”.



Where do you want to install this package?

**Install in a Production Environment**

Install this package in the org where you or your users work, including Developer Edition orgs.

\* Connected Salesforce Accounts

kushagra.aggarwal@idt.net

Don't see your account? [More Info](#)

[Install in Production](#)

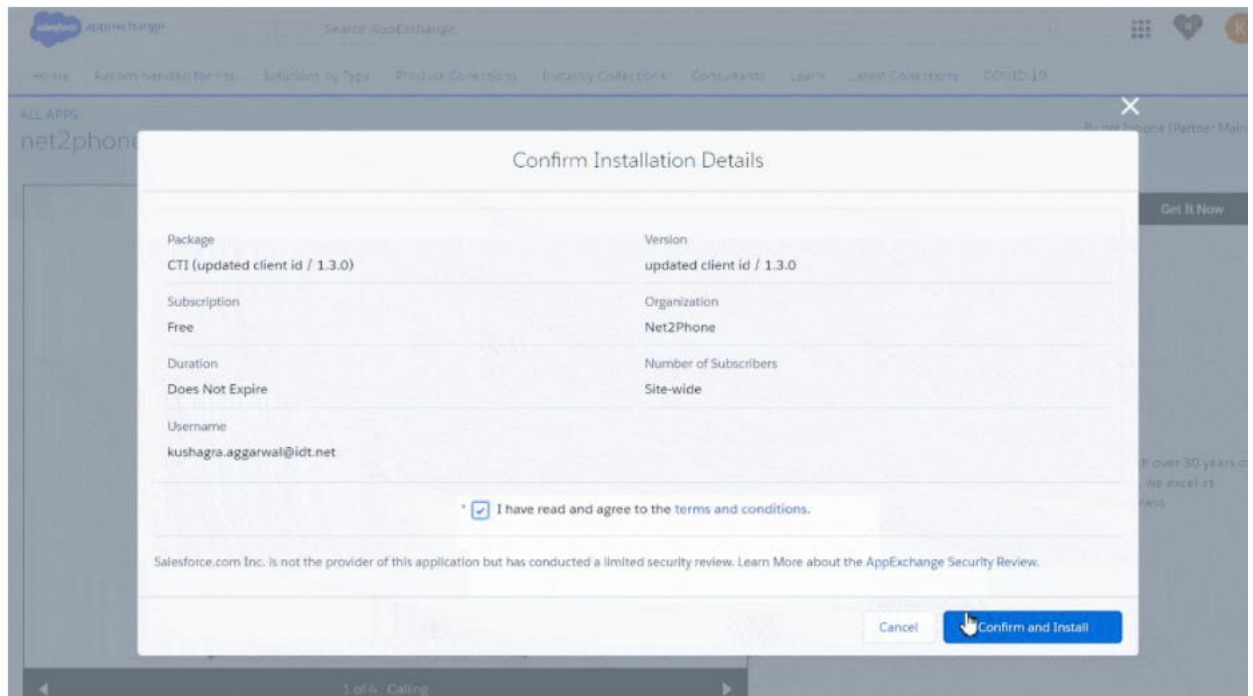
**Install in a Sandbox**

Test this package in a copy of a production org.

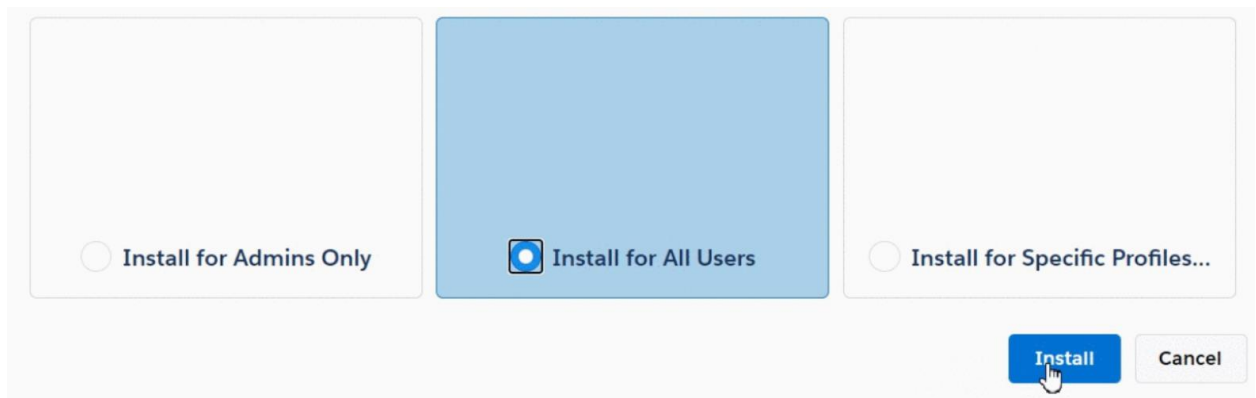
[Install in Sandbox](#)

[Cancel](#)

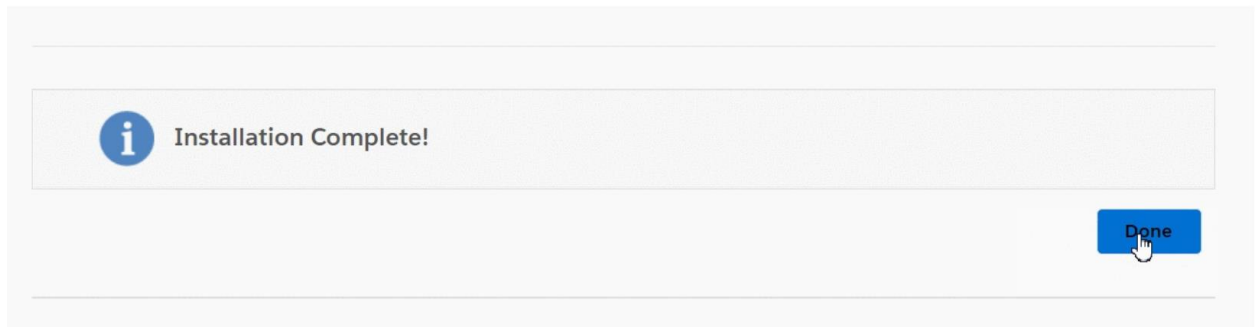
- Lea y acepte los terminos y condiciones.
- Clic en “Confirm and Install”.



- Inicie sesión en Salesforce al ser re direccionado.
- Seleccione "Install for All Users".



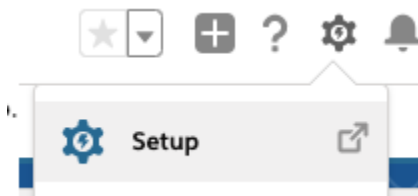
- Clic en "Install".
- Al finalizar la instalación ,clic en "Done"



Nota: Finalizada la instalación del paquete deberá llegarle un correo de confirmación al administrador.

## 2. Configurar la aplicación de **net2phone**

- Clic en el icono de engranaje en la esquina superior derecha , luego clic en “Setup”



- Escribir “Call” en el cuadro de búsqueda rápida.
- Clic en the Softphone Layouts en el lado izquierdo.



### Feature Settings

#### Call Coaching

##### Call Coaching Settings

#### Service

#### Call Center

##### Call Centers

##### Directory Numbers

##### Softphone Layouts

- Clic en el botón “New”.

## Softphone Layouts

[Help for this Page](#)

A softphone is a customizable call control tool that appears in the sidebar of every salesforce.com page if a user is assigned to a call center and is working on a machine on which a CTI adapter has been installed. Similar to page layouts, you can design custom softphone layouts and assign them to call center users based on their user profile.

Action	Name	Default	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
--------	------	---------	------------------	--------------	------------------------	--------------------

- Colocarle un nombre a la plantilla y luego haga Clic en en el checkbox “Default Layout”.

The screenshot shows the 'Softphone Layout Edit' interface in Salesforce. At the top, there's a search bar and navigation tabs for 'Setup', 'Home', and 'Object Manager'. The left sidebar shows a search for 'call' and a navigation tree with 'Feature Settings', 'Service', 'Call Center', 'Call Centers', 'Directory Numbers', and 'Softphone Layouts'. The main content area is titled 'Softphone Layout Edit' and includes a 'Name' field with 'net2phone', a 'Default Layout' checkbox, and a 'Select Call Type' dropdown set to 'Inbound'. Below this, there are sections for 'Display these call-related fields' (with 'Caller ID, Dialed Number' selected) and 'Display these salesforce.com objects' (with 'Account, Contact, Lead' selected). There are 'Save' and 'Cancel' buttons at the top right of the form area.

- Clic en “Save”.

### 3. Agregar usuarios al call center

- Escriba "Call Centers" en el cuadro de búsqueda rápida.
- Clic en la pestaña “Call Centers”.

call centers

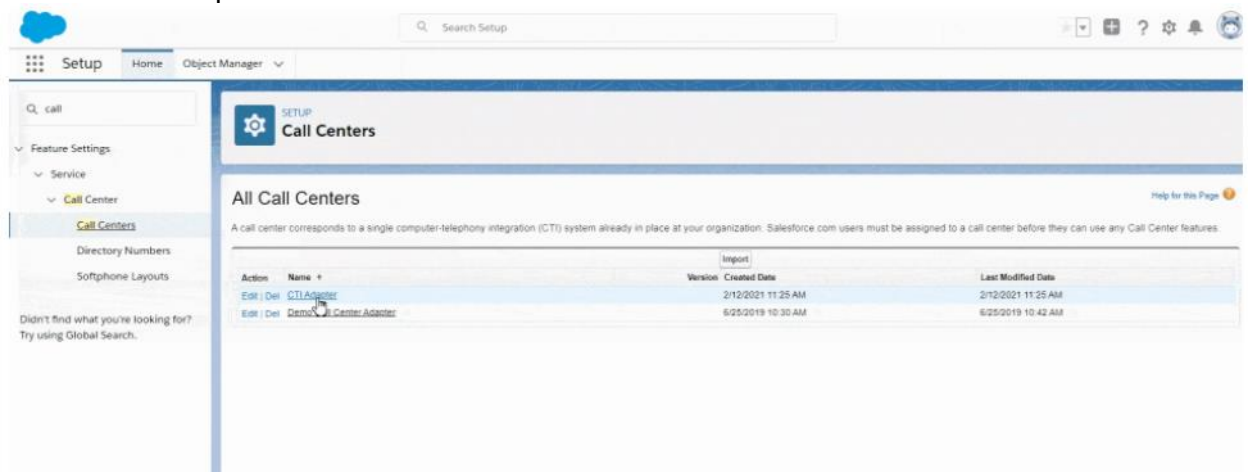
Feature Settings

Service

Call Center

Call Centers

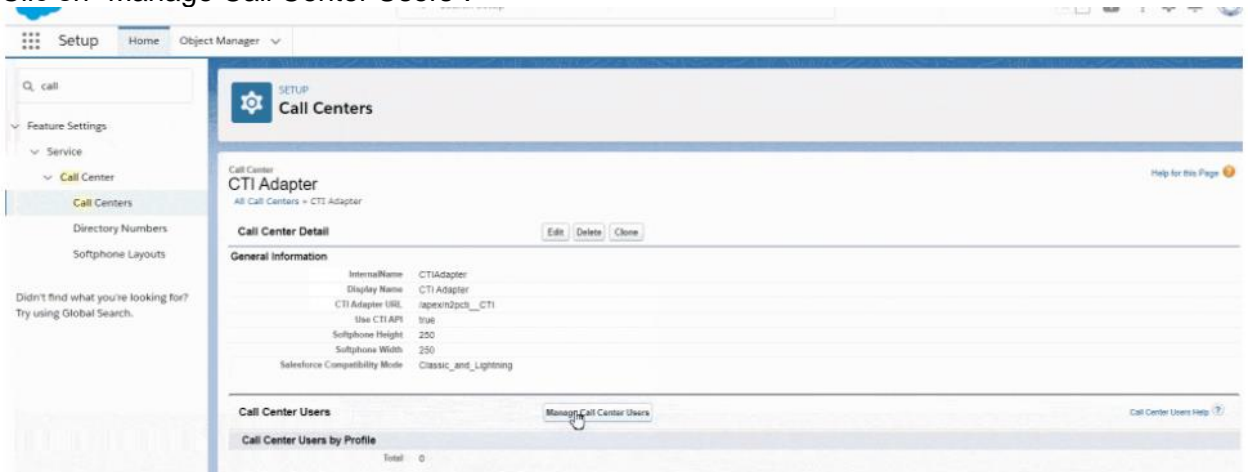
- Clic en “CTI Adapter”.



The screenshot shows the Salesforce Setup interface for Call Centers. The left sidebar contains a search bar with 'call' and a navigation menu with 'Feature Settings', 'Service', and 'Call Center'. The 'Call Centers' link is highlighted. The main content area is titled 'All Call Centers' and includes a table with columns for 'Actions', 'Name', 'Version', 'Created Date', and 'Last Modified Date'. Two rows are visible: 'CTI Adapter' and 'Demo Call Center Adapter'.

Actions	Name	Version	Created Date	Last Modified Date
Edit   Del	CTI Adapter		2/12/2021 11:25 AM	2/12/2021 11:25 AM
Edit   Del	Demo Call Center Adapter		6/25/2019 10:30 AM	6/25/2019 10:42 AM

- Clic en “Manage Call Center Users”.



The screenshot shows the 'Call Center Detail' page for the 'CTI Adapter'. The page includes a 'General Information' section with fields for 'InternalName', 'Display Name', 'CTI Adapter URL', 'Use CTI API', 'Softphone Height', 'Softphone Width', and 'Salesforce Compatibility Mode'. Below this is a 'Call Center Users' section with a 'Manage Call Center Users' button and a 'Call Center Users by Profile' table showing a total of 0 users.

Field	Value
InternalName	CTIAdapter
Display Name	CTI Adapter
CTI Adapter URL	apexn2pcti_CTI
Use CTI API	true
Softphone Height	250
Softphone Width	250
Salesforce Compatibility Mode	Classic_and_Lightning

- Clic en “Add More Users”.

SETUP  
Call Centers

Call Center  
CTI Adapter: Manage Users  
All Call Centers > CTI Adapter > Manage Users

View: All | Create New User

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

Action	Full Name	Alias	Username	Role	Profile
<input type="checkbox"/>	Agustina Kusba02	8008	agustina.egorova@st.net.usappc1		System Administrator

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

- Clic en "Find" para traer el listado de usuarios

SETUP  
Call Centers

Call Center  
CTI Adapter: Search for New Users  
All Call Centers > CTI Adapter > Manage Users > Search for New Users

Set the search criteria below and then click Search to find salesforce.com users who should be enabled as call center agents. Users already enabled as call center agents are excluded from the search results.

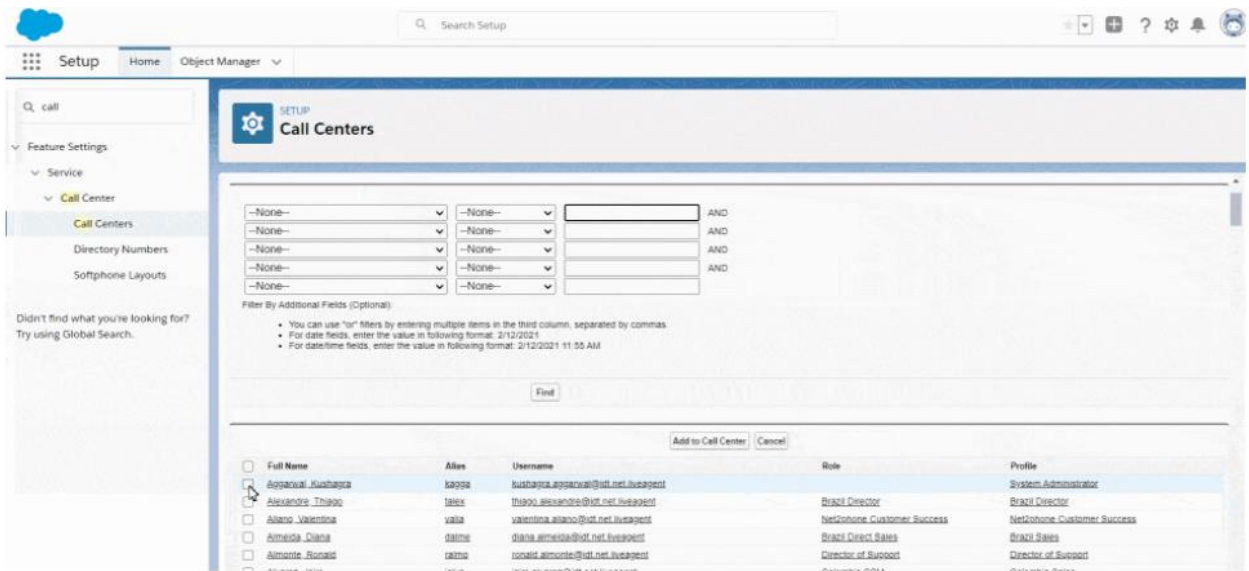
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 2/12/2021.
- For datetime fields, enter the value in following format: 2/12/2021 11:55 AM

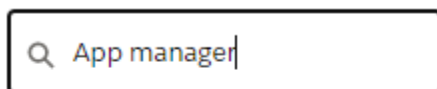
Find

- Seleccione los usuarios realizando un clic en el checkbox junto a sus nombres y luego realizando click en "Add to Call Center".



#### 4. Agregar Softphone a la barra de herramientas

- Escriba "App Manager" en el cuadro de búsqueda rápida.
- Clic en "App Manager".



▼ Apps

**App Manager**

- Navegue hasta el modulo en el necesita agregar el conector , vaya hasta el final del mismo donde se encuentra un icono que le permitirá editarlo (flecha hacia abajo en el lado derecho) y entonces edite.  
Importante el "App Type" de este módulo debe tener la leyenda "Lighting"

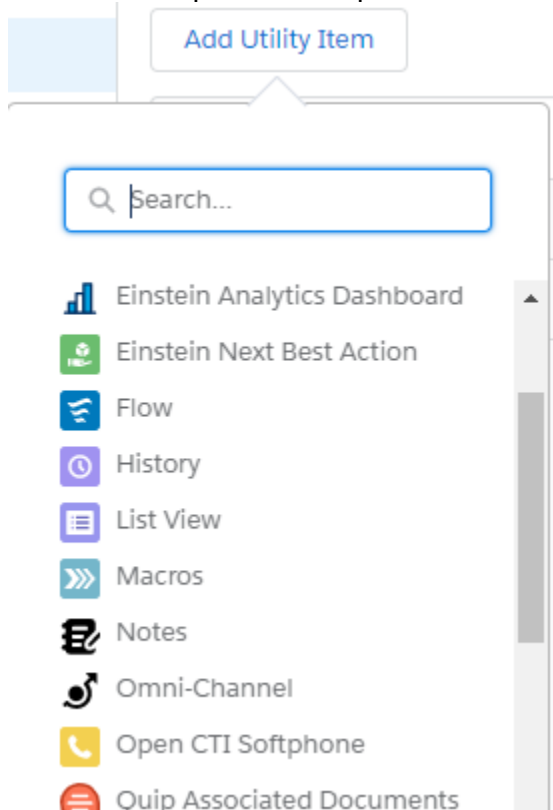
Ejemplo de Modulo : Sales



- Clic en la pestaña “Utility Items” arriba a la izquierda.
- Clic en “Add Utility Item” .



- Seleccione “Open CTI Softphone” en la lista.



- Clic en “Save”.

## 5. Inicie sesión con sus credenciales de **net2phone**

Al finalizar los pasos anteriores solo resta que los usuarios inicien sesión en el softphone con las credenciales de las extensiones contratadas a **net2phone**.

Nota: Las credenciales para este paso serán provistas por net2phone

### Dentro del App Exchange hay un video para este paso : [Clic Aquí](#)

https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3u00000MzDpEAL

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< SEARCH RESULTS | ALL APPS > SALES > PRODUCTIVITY net2phone for Salesforce By net2phone (Partner Main\*)

Get It Now

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RATING ★★★★★ (0) CATEGORIES Productivity

LATEST RELEASE 2/22/2021

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4 of 4 : Make Salesforce calls using net2phone!

Recuerde que deberá tener su extensión registrada en alguna de las opciones que le ofrecerá **net2phone**.

Solución de problemas comunes:

Si la aplicación de net2phone aparece en blanco cuando es abierta desde la barra de herramientas deberá deshabilitar “clickjack protection”

- Escriba "Health Check" en el cuadro de búsqueda rápida.
- Clic en “Health Check”.
- Navegue hasta “Clickjack protection for customer Visualforce pages with headers disabled” y luego clic en “Session Settings”.
- Desmarque el e checkbox junto a “Enable clickjack protection for customer Visualforce pages with headers disabled”.
- Clic en “Save”.

Si los usuarios no pueden ser agregados al “CTI Adapter Call Center” porque usaron la aplicación de net2phone en Salesforce classic, compruebe lo siguiente:

- En el menú de configuración escriba "Call Centers" en el cuadro de búsqueda rápida.
- Clic en “Call Centers”.
- Clic en “CTI Adapter”.
- Clic en “Manage Call Center Users”.
- Seleccione todos los usuarios que desee tener disponibles para la versión de la app “Lightning” Clic en “Remove Users”.
- Clic en “OK”.
- Agregue los usuarios al adaptado de call center de net2phone Adapter call center como se mostró en el paso 4 de esta guía.