

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 <u>AppExchange</u>. (Asegurese de haber iniciado sesión en App Exchange)



• Haga Clic en en el icono de *net2phone*

Apps 5 Results			
LISTING	LATEST RELEASE	RATING	PRICE
2 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*)
Phone Phone Phone B66-978-8260	Get It Now Starting at \$2 USD per user per month ① RATING CATEGORIES ★★★★★★(0) 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.
▲ DIAL Log a call manually	▶

• Clic en instalar en "Production".

approximate		III 🖤 🕼
net2phone for Salesfor	Where do you want to install this package?	By net2phone (Partner Malo
-	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 kushagra.aggarwal@idt.net Cont see your account? More Info Install in Pilotection	ermonth O
	Install in a Sandbox Test this package in a copy of a production org.	etter businesses! unications provider with over 30 years of rers in various markets, we excel at re- nightest quality business
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- Lea y acepte los termininos y condiciones.
- Clic en "Confirm and Install".



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Duration Does Not Expire	Number of Subscribers Site-wide	
Username kushagra.aggarwal@idt.net		Prover 30 years
. 🖸 1	have read and agree to the terms and conditions.	The second
Salesforce.com Inc. is not the provider of this application but	has conducted a limited security review. Learn More about the AppExchange Security Review.	100
in Minute	Cancel Confirm and Insta	

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

Install for Admins Only	Install for All Users	Install for Specific Profiles.

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



net2pl

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"

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

Q call

- Feature Settings
 - Call Coaching

Call Coaching Settings

- Service
 - ✓ Call Center

Call Centers

Directory Numbers

Softphone Layouts

• Clic en el botón "New".

net2	0	h	0	n	e
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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 to call center users based on their user profile.	user is assigned to a call center and is working	ig on a machine on which a CTI adapter has been installed. Sir	milar to page layouts, you can design custom softphone layouts and assign them
	New Softphone Layo	ut Assignment	
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".



- Clic en "Save".
- 3. Agregar usuarios al call center
 - Escriba "Call Centers" en el cuadro de búsqueda rápida.
 - Clic en la pestaña "Call Centers".



Q call centers	
✓ Feature Settings	
✓ Service	
✓ Call Center	
Call Centers	

• Clic en "CTI Adapter".

Q, call	SETUP				
Feature Settings	Call Centers				
 Service Call Center 	All Call Centers			Help for this	Page
Call Centers	A call center corresponds to a single computer telephony integration	CTI system already in place at your organization. Salesforce com users must	be assigned to a call center before they can use	any Call Center Ra	tures
Directory Numbers		(herea)			
Softphone Lavouts	Action Name *	Version Created Date	Lest Modified Date		
	Edit Del CTI Adjacter	2/12/2021 11:25 AM	2/12/2021 11:25 AM		
drift find what unside looking for?	Edt Del Demo Ecenter Adapter	6/25/2019 10 30 AM	6/25/2019 10 42 AM		
y using Global Search.					

• Clic en "Manage Call Center Users".

Q, call	SETUP			
 Feature Settings 	Call Centers			
 Service Call Center 	Call Center CTI Adapter			Help for this Page 🌖
Call Centers	All Call Centers + CTI Adapter			
Directory Numbers	Call Center Detail		Edit Delete Clone	
Softphone Layouts	General Information			
	InternalName	CTIAdapter		
Printed and a state of the local local local local	Display Name	CTI Adapter		
Didn't find what you're looking for?	CTI Adapter URL	/apex/n2pcti_CTI		
Try using Global Search.	Use CTLAPI	true		
	Softphone Height	250		
	Sultphone Width	250		
	Salesforce Compatibility Mode	Classic_and_Lightning		
	Call Center Users		Managg_all Center Users	Call Center Users Help (7)
	Call Center Users by Profile			

• Clic en "Add More Users".



Call Centers			
Call Center CTI Adapter: Manage Users All Call Centers - CTI Adapter - Manage Users View: All V Counter, New			Help for this Page 🥹
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Appartual Kushaora	8000B	kushaora, apparwal@ktt.net.liveapent	Svettern Administrator
			A B C D E F G H I J K L M N O P G R S T U V W X Y Z OM A

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

Center 1 Adapter: Search for Ne Call Centers - CTI Adapter - Manage Use	ew L	Jsers arch for New User			Holp for this Page
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.
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 Hor By Additional Fields (Optional) You can use "or" fibers by entenne For date Selas, enter the value in For date/time fields, enter the value 	ng multig i followie lue in fo	pie items in the thir ig format 2/12/202 Rowing format 2/12	t column, separated by cr 1 22021 11 55 AM	mmas	

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



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✓ Feature Settings	Can Centers					
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	Almonte Ronald	raimo	ronald atmonte@idt.net.	heagent	Director of Support	Director of Support
		(a))	Table of an and the set of a		Automatica Adda	Automatic Autos

- 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" .





• 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

salesforce appexchange	Q Search App	Exchange						Sign Up Log In	
Home Recommended for You S	olutions by Type	Product Collections	Industry Collections	Consultants	Learn	Latest Collections	COVID-19		
<pre>< search results all apps > sales net2phone for Salesfor</pre>	s > productivity rce							By net2phone (Partner Mair	n*)
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0,000 anticipations, so. 4 light second lifes II 0:12 → 4 of	₽ f 4 : Make Salesforce	THECKY EXPRESS	↓	× [1]					

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 usuaron 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.