

Newtel for Salesforce

Installation Instructions for the Newtel CTI Integration App for Salesforce



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Install Newtel for Salesforce

- 1. Install the Newtel for Salesforce package from this <u>link</u>. Installation of this package requires administrator privileges.
- 2. During installation, you will be asked to which subset of users you would like to grant access. It is recommended to select "Install for All Users" as this will ensure future steps will go smoothly; however, only users the administrator assigns to the call center will have access to the application.

By Takum	I Newtel a Technology, LLC		
Install for Ad	dmins Only	for All Users	Install for Specific Profiles
You're instal Partner Prog	ing a Non-Salesforce Application that is ram.	s not authorized for distribu	tion as part of Salesforce's AppExchange
acknowledge that I'n Program.	n installing a Non-Salesforce Application that	is not authorized for distribution	n as part of Salesforce's AppExchange Partner Install Cancel
App Name	Publisher	Version Name	Version Number
Newtel	Takuma Technology, LLC	1.94	1.94
Additional Details	View Components		

- 3. Check the box acknowledging the package is a Non-Salesforce Application and then click Install.
- 4. Select **Yes** to grant access to the Newtel sites and then **Continue**.

	Approve Th	ird-Party Access
Thi: Wh	s package may send or receive data from thir at if you are unsure?	d-party websites. Make sure you trust these websites.
	Website	SSL Encrypted
	portal.mypbxmanager.net	\checkmark
	portal.mypbxmanager.net	



5. Wait for the package installation to complete.

By Take	all Newtel uma Technology, LLC		
	🁑 Installing and g	ranting access to a	II Users
App Name	Publisher	Version Name	Version Number
App Name Newtel	Publisher Takuma Technology, LLC	Version Name	Version Number 1.94

6. When the installation is complete, click **Done**.

Insta By Takun	II Newtel na Technology, LLC			
i Insta	llation Complete!			
			De	one
App Name	Publisher	Version Name	Version Number	
Newtel	Takuma Technology, LLC	1.94	1.94	

7. After installation Newtel will be listed as "Newtel" in the installed packages section of Salesforce Setup.



Configure the Call Center

1. Go to Setup > Custom Code > Visualforce Pages.



2. Click the preview icon next to the NewTel_CTI page.



- After the page opens in a new tab, copy the URL. (e.g. https://[YOURSALESFORCEDOMAIN].vf.force.com/apex/NewTel_CTI)
- 4. Close the tab or window and return to Setup.
- 5. Go to Setup > Feature Settings > Service > Call Center > Call Centers and click Continue.

Call Centers	
Say Hello to Salesforce Call Center	Help for this Page 🥹
Connect your telephony system to Salesforce and boost user productivity by showing related Salesforce information for every incoming call. Dial numbers dire report on call outcome, duration, and more.	ctly from Salesforce and
1. <u>Define a call center</u> Specify the call center's name, IP address, port, and any other connection information. Erter dialing options for informational, long distance, and external calls. Manaeu users Select the user syou want to be members of the call center. <u>Urdate the call center directory</u> Add useful hone numbers beyond the call center user extensions that salesforce com automatically includes. <u>Configure softborne layouts</u> Select the call definits and Salesforce objects that are automatically displayed with inbound, outbound, and internal calls. Select the call definits and Salesforce objects that are automatically displayed with inbound, outbound, and internal calls. Select the call definits and Salesforce objects that are automatically displayed with inbound, outbound, and internal calls. Select the call definits and Salesforce objects that are automatically displayed with inbound, outbound, and internal calls.	
Continue	

6. Click Edit next to the NewTel call center.

Call Centers
All Call Centers A call center corresponds to a single computer-telephony integration (CTI) system already in place at your organization
Rame *



7. Paste the URL from the NewTel_CTI page in the CTI Adapter URL field and click **Save**.

Call Centers	
Call Center Edit NewTel All Call Centers » NewTel	
Call Center Edit	Save Cancel
General Information	
InternalName	NewTel
Display Name	NewTel
CTI Adapter URL	orce.com/apex/NewTel_CTI
Use CTI API	true
Softphone Height	300
Softphone Width	500
Salesforce Compatibility Mode	Lightning
Provider Base URL	https://portal.mypbxmanage
Dialing Options	
Outside Prefix	9
Long Distance Prefix	1
International Prefix	01
	Save Cancel

Add Users to the Call Center

1. Go to Setup > Feature Settings > Service > Call Center > Call Centers and click Continue.

Call Centers	117-J116-
Say Hello to Salesforce Call Center	Help for this Page 🥹
Connect your telephony system to Salesforce and boost user productivity by showing related Salesforce information for every incoming call. Dial numbers report on call outcome, duration, and more.	s directly from Salesforce and
Define a call center Specify the call center's name, IP address, port, and any other connection information. Enter daiing options for international, long distance, and external calls. Manage users Select the users you want to be members of the call center. Juddle the call center directory Add useful phone numbers beyond the call center user extensions that salesforce com automatically includes. Continue softchone layouts Select the call defials and Salesforce objects that are automatically displayed with inbound, outbound, and internal calls. Assign a softchone layout to any user profile. Don't show me this page again Continue	

8. Click Manage Call Center Users.

Call Center Users		Manage Call Center Users
Call Center Users by Profile		
	Total 0	



9. Click Add More Users.



Note: If your users are already added to another call center, please remove them from that call center before you try to add them to Newtel.

10. Optionally adjust the filters and then click Find.

Call Centers			
Call Center NewTel: Search for New Use All Call Centers » NewTel » Manage Users » Se Set the search criteria below and then click Se	FS arch for New Users arch to find salesfo	prce.com users w	who should be enabled as call center agents.
None	 None 	~	AND
None	None	~	AND
None	 None 	~	AND
None	 None 	▼	AND
None	 None 	~	
Filter By Additional Fields (Optional): • You can use "or" filters by entering n • For date fields, enter the value in 6 • For date/time fields, enter the value	ultiple items in the t owing format: 10/24 in following format: 1	third column, sepa 1/2022 10/24/2022, 12:00	IPM

11. Select the checkbox next to each user to add and click Add to Call Center.

	1			
Center				
wTel: Search for	New Users			
Call Centers » NewTel » Mar	age Users » Search for New Users			
the search criteria below ar	id then click Search to find salesfor	ce.com users who should b	d be enabled as call center agents. Users already enabled as call center agents are excluded from the search	ch results.
None	~None	~	AND	
None	✓None	~	AND	
None	✓None	~	AND	
None	✓None	~	AND	
None	vNone	v		
 You can use "or" filt For date fields, enter 	ers by entering multiple items in the th or the value in following format: 10/24/, , enter the value in following format: 11	iird column, separated by com 2022 0/24/2022, 12:52 PM	ommas.	
 For date/time fields 				
 For date/time fields 				
 For date/time fields 			Find	
For date/time fields			Find	
For date/time fields			Find 2 Add	to Call Center
For date/time fields Full Name		Alias	Find 2 Addr	to Call Center
For date/time fields Full Name		Alias	Find 2 Add 1 Username	to Call Center
For date/time fields Full Name User Integration		Allas	Find 2 Add 1 Username Integration@00ddn00000147xbmaa.com	to Call Center



to Ca	up all Centers	
57/11	ر (رد م) (رجم) <i>(</i> الرجم)	だーション シングローン ビビー シングローン
	Manage Users	
All Call Center	s » NewTel » Manage Users	
View: All	Create New View	
View: All	Create New View	A B C D E F G H I J
View: All	Create New View	A B C D E F G H I J Add More Users Remove Users
View: All	Create New View Full Name †	A B C D E F G H I J Add More Users Allas Username
View: All	Create New View Full Name †	A B C D E F G H I I Add More Users Remove Users Allas Username

Add a Softphone Layout

1. Go to Setup > Feature Settings > Service > Call Center > Softphone Layouts and click Continue.



2. Click New.

Setur Sof	tphone La	youts				
softphone is a CTI adapter ha	customizable call is been installed.	control tool that appears in t Similar to page layouts, you	he sidebar of ever can design custon	y salesford n softphone	e.com page if a a layouts and ass	user is assig sign them to
SOTIPHON softphone is a CTI adapter ha	customizable call is been installed.	control tool that appears in t Similar to page layouts, you	he sidebar of ever can design custon	y salesford n softphone	e.com page if a a layouts and ass yout Assignment	user is assig sign them to
SOTIPHON softphone is a CTI adapter ha	customizable call is been installed.	control tool that appears in t Similar to page layouts, you Created By Alias	he sidebar of ever can design custon	y salesford h softphone foftphone La Date	e.com page if a a layouts and ass ayout Assignment Last Modi	user is assig sign them to fied By Alias



Newtel for Salesforce | Administrator Guide

3. Enter a name in the Name field (e.g. "Newtel SoftPhone Layout"), select **Is Default Layout**, and click **Save**.

Softphone Layouts	
Softphone Layout Edit Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layouts	Help for this Page 🥹
Layout Assignment in the Soltphone Layouts page.	
Name Newtel Softphone Layout Select Call Type Inbound V	
Softphone Layout	Help about this section 🕜
Display these call-related fields: Caller ID, Dialed Number Display these salesforce.com objects:	Edit
Account, Contact, Lead	Add / Remove Objects
If single Account found, display: Account Name If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed in Salesforce.	played.
If single Contact found, display: Name If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.	Edit
If single Lead found, display: Name If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.	Edit
Screen Pop Settings	Help about this section 🕢
Screen pops open within: Existing browser window	Edit
No matching records: Don't pop any screen	Edit
Single-matching record: Pop detail page	Edit
Multiple-matching records: Don't pop any screen	Edit

4. Click Softphone Layout Assignment.

SETUP Softphone Layouts	5				
Softphone Layouts					Help for this F
A softphone is a customizable call control t a CTI adapter has been installed. Similar to	ool that appea page layouts	rs in the sidebar of , you can design cu	every salesforce.com page if a stom softphone layouts and ass	user is assigned to a call center ign them to call center users ba	and is working on a machine or sed on their user profile.
		New	Softphone Layout Assignment		
Action Name †	Default	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
Edit Newtel Softphone Layout	✓				

5. Assign the layout to the appropriate profiles and click **Save**.

Softphone La	youts			
				11/100
ottphone Layout	Assignme	nt		
	0.50			
sign a softphone layout to each	n profile in the list t	ielow. On	ly profiles that include c	all center a
sign a softphone layout to each	n profile in the list b	ielow. On	ly profiles that include c	all center a
isign a softphone layout to each	n profile in the list b	save	ly profiles that include c	all center a
isign a softphone layout to each	n profile in the list b	save	ly profiles that include c	all center a
Profile System Administrator (1)	n profile in the list b	save	Cancel	all center a
Profile System Administrator (1)	Default Default	save	ly profiles that include c Cancel	all center a
Profile System Administrator (1)	- Default Newtel Softph	save	Cancel	all center a



Setup Users

Grant Permissions

1. Go to Setup > Users > Permission Sets and click on Newtel.

Pe	Permission Sets				
Permiss	sion Sets				
On this page y	ou can create, view, and manage permission sets.				
In addition, you	u can use the SalasfarceA mehile ann to assign normission sate to a user. Download SalasfarceA from the Ann Store d				
All V Edit	Delete Create New View				
Action	Permission Set Label *				
Clone	Buyer				
Clone	Buyer Manager				
Clone	CRM User				
Clone	Commerce Admin				
Clone	FieldServiceMobileStandardPermSet				
Clone	Merchandiser				
Clone	Newter				
Clone	Sales Cloud User				
Clone	Salesforce CMS Integration Admin				
Clone	Salesforce Console User				
Clone	Security Center Integration User				
Clone	Service Cloud User				
Clone	Shopper				
Clone	Slack Service User				
Clone	Standard Einstein Activity Capture				

2. Click Manage Assignments.

Permission Sets	
rmission Set	
Q, Find Settings 🛞 Clone Manage Assign	ments
Permission Set Overview	
C	Description
	License
Session Activation	n Required
Last M	lodified By
Apps	
	Assigned Apps Settings that specify which apps are visible in the app menu
	5 I I I I I I I I I I I I I I I I I I I

3. Click Add Assignments.

Permission Se	ets			
ssigned Users				Sec 7777
Newtel × Back to: Permission Set			ABCDE	F G H
Vewtel × Back to: Permission Set		Add Assignments Remov	A B C D E ve Assignments	F G H
Vewtel Back to: Permission Set Full Name +	Alias	Add Assignments Remov	A B C D E ve Assignments Role	F G H I
Vewtel Back to: Permission Set Full Name † No records to display.	Alias	Add Assignments remov	A B C D E ve Assignments Role	F G H



4. Select all the users who will use the Newtel app and click Add Assignments.



Add Phone Numbers to Users

- 1. Go to **Setup > Users > Users**.
- Edit each user record and add a phone number.
 Note: This phone number will be used to route calls to the user. The number dialed on inbound



calls will determine the user to receive the call.

Set Caller Market	MAC THEIT CAREANET A	NIIONIA DIST <u>CANE</u> TA	NIII - THEICHEANEIC
SETUP Users			
User			User ProfileHelp for this
Permission Set Assignments [1]	Permission Set Assignments: Activation Requi	red (0) Permission Set Group Assignments (0) Pe	rmission Set License Assignments [0] Personal Group
Public Group Membership [0]	Queue Membership [0] Team [0] Manager Authentication Settings for Extern	is in the Role Hierarchy. [0] OAuth Connected Apps [2] al Systems [0] Login History (7+) User Provisionin] <u>Third-Party Account Links</u> [0] <u>Installed Mobile Ap</u> or Accounts 10]
		analyzanina (s) as Surrinanari (r.) as an original	Serverse (a)
User Detail	Edit Sharing	Change Password	
Name		Role	
Alias	100	User License	Salesforce
Email		Profile	System Administrator
Username		Active	✓
Nickname	1	Marketing User	✓
Title		Offline User	✓
Company		Knowledge User	
Department		Flow User	
Division		Service Cloud User	✓
Address	US	Site.com Contributor User	
Time Zone	(GMT-07:00) Pacific Daylight Time (Americ	a/Los_Angeles) Site.com Publisher User	
Locale	English (United States)	WDC User	
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	1
Manager		Accessibility Mode (Classic	
Receive Approval Request	Only if I am an annroyar	Only) Debug Mode	
Emails	Only in rain an approver	Debug mode	
Federation ID		High-Contrast Palette on Charts	
App Registration: One-Time Password Authenticator	[Connect]	Load Lightning Pages While Scrolling	✓ 1
Authenticator	[Connect]	Send Apex Warning Emails	
Security Key (U2F or WebAuthn)	1	Salesforce CRM Content User	✓
Lightning Login	[Enroll]	Receive Salesforce CRM Content Email Alerts	1
(Expires in 1 to 24 Hours)	[Generate]	Receive Salestorce CRM Content Alerts as Daily Digest	~
		Make Setup My Default Landing Page	✓
		Quick Access Menu	✓
		Development Mode	
		Show View State in Development Mode	
		Cache Diagnostics	
		Allow Forecasting	 Image: A start of the start of
		Call Center	NewTel
		Phone	
		Extension	
		Fax	
		Mobile	[Add]
		Email Encoding	Unicode (UTF-8)
		Start of day	6:00 AM
		End of day	11:00 PM
		Elid of day	11.001.00

Grant Public Access to the Endpoint

1. Go to Setup > User Interface > Sites and Domains > Sites.



2. Accept the Salesforce Sites Terms of Use and click **Register My Salesforce Site Domain**. **Note:** If you already have a site available for this integration, skip to step 7 below.

SETUP Sites	
Sites	Help for this Page 🥹
What is a Site?	
Salesforce after senables you to create public websites and applications that are directly integrated with y and password You can publicly imposes any information stored in your organization through neges that me sites to gather customer feedback, branded login and registration pages for your portals. Web forms for co Because sites are hotseld on Salesforce servers, there are no data integration issues. And because sites performed automatically You can allow users to access your site through your unque Salesforce domain your site.	ur Salesforce com organization—without requiring users to log in with a username tach the lock and field of your company's brand. Use sites to create public community apturing leads, and so on. are built on native Visualforce pages, data validation on collected information is and URL, or you can register your own branded domain or subdomain to redirect to the Exception a software company could create one site for paw developers
another for customers, and a third for marketing.	s. For example, a software company cours create one site for new severopers,
Sample Domain Name my salesforce-sites com	Sample sites URLs my salesforce-sites com/customers my salesforce-sites com/developers salesforce-sites com/partners
http:// my.salesforce-sites.com 2	

3. If prompted, click **Ok** to proceed with the registration of your Site.



4. Click **New** to add a site.

Sites	
Sites	Help for this Page 🥹
What is a Site?	
Salesforce sites enables you to create public websites and applications that are directly and password. You can publicly expose any information stored in your organization thror sites to gather customer feedback, branded login and registration pages for your portal	y integrated with your Salesforce com organization—without requiring users to log in with a username ough pages that match the look and feel of your company's brand. Use sites to create public community s, Web forms for capturing leads, and so on.
Because sites are hosted on Salesforce servers, there are no data integration issues. A performed automatically. You can allow users to access your site through your unique s your site.	And because sites are built on native Visualforce pages, data validation on collected information is Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to
Create multiple sites that appeal to different audiences and satisfy your company's vari another for customers, and a third for marketing.	ous business needs. For example, a software company could create one site for new developers,
	Sample sites URLs
	.my.salesforce-sites.com/customers
Sample Domain Name	my salesforce-sites com/developers
.my.salesforce-sites	s.com
Your Salesforce site domain name is	y.salesforce-sites.com
Salesforce Sites Terms and Conditions	
Settings	
These settings affect all Salesforce sites.	
Allow using standard external profiles for self-registration, user creation, and login	1
Save	
Sites (creative-unicorn-4it0bs-dev- ed.trailblaze.my.salesforce-sites.com)	
Site Label † Site URL Site Description	Active Site Type Last Modified By
No records to display.	

5. Enter a Site Label, Site Name, Site Contact, Default Record Owner, and Active Site Home Page, and click Save.

Note: It is not in the scope of this document to define the full parameters of a Salesforce Site. The inputs shown here are examples.

SETUP Sites	INTERNET AND
Site Edit	Help for this Page 🕤
New Site	Save Cancel
Site Label	
Site Name	api 2
Site Description	G
Site Contact	Integration User 3
Default Record Owner	Integration User 4
Default Web Address	http://creative-unicom-4it0bs-dev-ed.trailblaze.my.salesforce-sites.com/
Active	
Active Site Home Page	InMaintenance O
Inactive Site Home Page	InMaintenance
Site lemplate	Site rempiate
Site Favorite Icon	
Analytics Tracking Code	
URL Rewriter Class	
Enable Feeds	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)
Lightning Features for Guest Users	
Enable Content Sniffing	
Enable Browser Cross Site	
Scripting Protection	
Referrer URL Protection	
Allow only required cookies for this site	i More Details
Redirect to custom domain	
Cache public Visualforce pages	🗹 👔 [More Info]
Guest Access to the Payments API	
Guest Access to the Support	
API	6
	Save Cancel



6. Click Activate.

SETUP Sites			
Site Details api			Help for this Page 🥹
Site Detail	Edit Public Access Settings	Login Settings URL Redirect Ad	stivate
Site Description	apı	Site Contact	api
Active		Login	Not Allowed
Active Site Home Page	InMaintenance [Preview]	Site Favorite Icon	
Inactive Site Home Page	InMaintenance [Preview]	Site Robots.txt	
Site Template	SiteTemplate [Preview]	Enable Feeds	
Analytics Tracking Code		URL Rewriter Class	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	Lightning Features for Guest Users	✓ 1
Enable Content Sniffing Protection	✓ 1	Enable Browser Cross Site Scripting Protection	✓ 1
Referrer URL Protection	✓ 1	Allow only required cookies for this site	More Details
Guest Access to the Payments API		Guest Access to the Support API	
Default Record Owner	Integration User	Redirect to custom domain	 ✓ 1
Cache public Visualforce pages	✓ 1 [More Info]		
Created By	Edit Public Access Settings	Last Modified By	tivate

7. When the site is active, click **Public Access Settings**.

SETUP Sites	911117-913917-91197-91197-91197	DASH (7778-META	AMUT ANSA
			J11/5 01/1/ ->
Site Details api			
« Back to List: Sites			
Site Detail	Edit Public Access Settings	ogin Settings URL Redirects De	eactivate
Site Label	api	Site Name	api
Site Description		Site Contact	Integration User
Active		Login	Not Allowed
Active Site Home Page	InMaintenance [Preview]	Site Favorite Icon	
Inactive Site Home Page	InMaintenance [Preview]	Site Robots.txt	
Site Template	SiteTemplate [Preview]	Enable Feeds	
Analytics Tracking Code		URL Rewriter Class	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	Lightning Features for Guest Users	1
Enable Content Sniffing Protection	✓ 1	Enable Browser Cross Site Scripting Protection	1
Referrer URL Protection	✓ 1	Allow only required cookies for this site	More Details
Guest Access to the Payments API		Guest Access to the Support API	
Default Record Owner	Integration User	Redirect to custom domain	 ✓ 1

8. Click View Users.

SETUP Profiles	
Profile api Profile	
Users with this profile have the p	ermissions and page layouts listed below. Administrators can cl
If your organization uses Record	Types, use the Edit links in the Record Type Settings section b
Login IP Ranges (0) E Enabled Cus	nabled Apex Class Access [0] Enabled Visualforce Page Access [11] 8 tom Metadata Type Access [0] Enabled Custom Setting Definitions Acces
Profile Detail	Edit View Users
Name	api Profile
User License	Guest User License
Description	



9. Click on the Site Guest User.



10. Scroll to the **Permission Set Assignments** section and click **Edit Assignments**.

Users		172411) (- \SS#1_112	
user api Site Guest User Permission Set Assig	nments (0) Permission Set Assignments: Activatio Public Group Membership (0	n Required (0) Permission Set Group Assignmer	ts [0] <u>Permissio</u> as [0]
User Detail	Edit Sharing	<u>XUEUC INCLUDEDIN</u> v ₁ <u>Included</u> (v ₂)	22 [V]
Name	ani Site Guest User	User License	Guest License
Alias	auest	Profile	api Profile
Email		Active	1
Username		Marketing User	а П
Nickname	ani	Mobile Push Registrations	View
Division		Data.com User Type	1
Time Zone	(GMT+00:00) Greenwich Mean Time (GMT)	Salesforce CRM Content User	
Locale	English (United States)	Email Encoding	Unicode (UTF-
Language	English		
Federation ID			
App Registration: One-Time Password Authenticator	i		
App Registration: Salesforce Authenticator	1	Used Data Space	0 B [View]
Security Key (U2F or WebAuthn)	1	Used File Space	0 B [View]
Lightning Login	1	Individual	
Temporary Verification Code (Expires in 1 to 24 Hours)	[Generate]		
Created By	Edit Sharing	Modified By	

11. Select Newtel in the list of Available Permission Sets, click Add, and then click Save.

Sellen Menter		
n Site Guest Liser		
pi Site Guest Osei	3	
	Save Cancel	
Available Permission Sets	Enabled F	Permission Sets
Buyer Manager	Noue	~
CRM User	Add	
Commerce Admin	2	
FieldServiceMobileStandardPermSet		
Merchandiser	Remove	
Newtel		
Sales Cloud User		
Salesforce Console User	-	-
LA MORE CONTRACTOR AND A CONTRACT A DESIGNATION		



Set Up the Newtel Portal

1. Go to **Setup > User Interface > Sites and Domains > Sites** and click on the name of the site that has the guest public access permission set.

Sites	
Sites	Help for this Page 🥹
What is a Site?	
Salesforce sites enables you to create public websites and applications that are directly integrated v and password. You can publicly expose any information stored in your organization through pages to sites to gather customer feedback, branded login and registration pages for your portals, Web forms Because sites are hosted on Salesforce servers, there are no data integration issues. And because performed automatically You can allow users to access your site through your unique Salesforce do your site.	with your Salesforce com organization—without requiring users to log in with a username hat match the look and field of your company's brand. Use sites to create public community s for capturing leads, and so on. sites are built on antive Vsualiforce pages, data validation on collected information is smain and URL, or you can register your own branded domain or subdomain to redirect to s needs. For example, a software company could create one site for new developers,
another for customers, and a third for marketing.	Sample sites UPI e
	my salesforce-sites.com/customers
Sample Domain Name	my salesforce-sites com/developers
	my salesforce-sites com/partners
Your Salesforce site domain name ismy.salesforce Salesforce Sites Terms and Conditions	-sites.com
These settings affect all Salesforce sites.	
Allow using standard external profiles for self-registration, user creation, and login 1	
Save	
Sites (
Action Site Label † Site URL Site	Description Active Site Type Last Modified By
Edit Deactivale api https://	Force.com

2. Click on the domain name listed in the Custom URLs section.

Sites						
_						
$\sim) (\sim) (\sim) $		- 771	ر کے ال	6- 0		
Site Details						
арі						
« Back to List: Sites						
Site Detail		Edit	Public Access Se	ttings	Login Settings	URL Redired
Site Label	api					Site
Site Description						Site Co
Active						
Active Site Home Page	InMaintenance [Previe	<u>w]</u>				Site Favorite
Inactive Site Home Page	InMaintenance (Previe	w]				Site Robo
Site Template	SiteTemplate [Preview]]				Enable F
Analytics Tracking Code						JRL Rewriter
Clickjack Protection Level	Allow framing by the sa	ame oriç	in only (Recomme	nded)	Lightning	Features for
Enable Content Sniffing Protection	✓ 1				Enable	Browser Cros cripting Prote
Referrer URL Protection	✓ 1				Allow only r	equired cooki thi
Guest Access to the Payments API	i				Guest Access	to the Suppo
Default Record Owner	Integration User				Redirec	to custom do
Cache public Visualforce pages	✓ i [More Info]					
Created By	(more integ					Last Modifi
		Edit	Public Access Se	ttings	Login Settings	URL Redired
Custom URLs		Click	on this URL			



3. Copy the URL in the **Domain Name** field.

\$ •	omains					
Domain					マカム いかん シンクク	/]
Domain D	Domain Name		>	Current HTTPS Option	Salesforce Sites My Domain	
Allo	w HSTS preloading registration Created By	✓		Modified By		
Custom UI	RLs					C
Action	Path	Status	Site Label		Site Type	

4. In a new tab or window, log into the Newtel portal (<u>https://portal.mypbxmanager.net/</u>) using your customer credentials.

Log in	



Newtel for Salesforce | Administrator Guide

Dial by name order:	Last name, first name
Format for received faxes:	PDF 👻
Automatically log out virtual telephones nightly:	No
Parking timeout:	5 minutes 👻
When a call fails:	Play error message, then hang up
Email when balance drops below threshold:	Yes 👻
Threshold (\$):	
When this happens, automatically top up to (\$):	
Locked (telephony):	No
Send events to URL:	
Billing address:	
Billing address:	
Address line 2:	
Address line 3:	
City or town:	
State or province:	
Post or zip code:	
Country:	United States of America 🔹
Other address information:	
*Email address:	-
Separate addresses with spaces. Telephone:	
Fax:	
	Faug
etala subh labala differable en en stand	Save
Heids with labels "like this are required.	

5. Go to Settings > Customer and scroll to the Send events to URL field.

6. Combine the domain name you copied in step 3 above and the following:

/services/apexrest/newtel/inboundCall/

The result should be something like this:

https://YOUR_SITE_DOMAIN.my.salesforcesites.com/services/apexrest/newtel/inboundCall/

7. Paste the combined URL into the Send events to URL field and click Save.



Add Open CTI Softphone to the Utility Bar

1. Go to Setup > Apps > App Manager.

	SETUP Lightning Experie	nce App Manager	\$\$\$\$\$400U_215\$\$4\$\$277	Net	w Lightning App Ne	w Connecte	d App	
29 item	29 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type							
	App Name \uparrow \checkmark	Developer Name \sim	Description \checkmark	Last Modified D \lor	Арр Туре 🛛 🗸	Vi \checkmark		
1	All Tabs	AllTabSet		10/24/2022, 10:25 A	Classic		•	
2	Analytics Studio	Insights	Build CRM Analytics dash	10/24/2022, 10:25 A	Classic	~	V	
3	Ant Migration Tool	Forcecom_Migration_Tool	The Force.com Migration	10/24/2022, 10:25 A	Connected (Managed)		•	
4	App Launcher	AppLauncher	App Launcher tabs	10/24/2022, 10:25 A	Classic	\checkmark	▼	
5	Bolt Solutions	LightningBolt	Discover and manage bus	10/24/2022, 10:25 A	Lightning	\checkmark		
6	Commerce	Commerce	Manage your store's prod	10/24/2022, 10:25 A	Lightning	~	•	
7	Community	Community	Salesforce CRM Communi	10/24/2022, 10:25 A	Classic	~	•	
8	Content	Content	Salesforce CRM Content	10/24/2022, 10:25 A	Classic	\checkmark	•	
9	Data Manager	DataManager	Use Data Manager to vie	10/24/2022, 10:25 A	Lightning	~	•	
10	Dataloader Bulk	Dataloader_Bulk	The Data Loader is an eas	10/24/2022, 10:25 A	Connected (Managed)		•	
11	Dataloader Partner	Dataloader_Partner	The Data Loader is an eas	10/24/2022, 10:25 A	Connected (Managed)		•	
12	Digital Experiences	SalesforceCMS	Manage content and med	10/24/2022, 10:25 A	Lightning	~	•	
13	Force.com IDE	Forcecom_IDE	The Force.com IDE is a po	10/24/2022, 10:25 A	Connected (Managed)		•	
14	Lightning Usage App	LightningInstrumentation	View Adoption and Usage	10/24/2022, 10:25 A	Lightning	~	•	
15	Marketing	Marketing	Best-in-class on-demand	10/24/2022, 10:25 A	Classic	~	•	
16	NewTel	NewTel		10/24/2022, 10:55 A	Lightning (Managed)	~	•	
17	Platform	Platform	The fundamental Lightnin	10/24/2022, 10:25 A	Classic		•	
18	Playground Starter	Playground_Starter	Get started with your Trail	10/24/2022, 10:25 A	Lightning (Managed)	\checkmark	•	
19	Sales	Sales	The world's most popular	10/24/2022, 10:25 A	Classic		•	
20	Sales	LightningSales	Manage your sales proces	10/24/2022, 10:25 A	Lightning	~	•	
21	Sales Console	LightningSalesConsole	(Lightning Experience) Let	10/24/2022, 10:25 A	Lightning	~	•	
22	Salesforce Chatter	Chatter	The Salesforce Chatter so	10/24/2022, 10:25 A	Classic	~	•	
23	Salesforce for Outlook	Salesforce_for_Outlook	A powerful Outlook integr	10/24/2022, 10:25 A	Connected (Managed)		•	
24	Salesforce Mobile Dashbo	Salesforce_Mobile_Dashb	The Salesforce.com Analyt	10/24/2022, 10:25 A	Connected (Managed)		•	
25	Salesforce Touch	Salesforce_Touch	Salesforce Touch is Salesf	10/24/2022, 10:25 A	Connected (Managed)		•	
26	Service	Service	Manage customer service	10/24/2022, 10:25 A	Classic	~	-	
27	Service Console	LightningService	(Lightning Experience) Let	10/24/2022, 10:25 A	Lightning	~	•	
28	Site.com	Sites	Build pixel-perfect, data-ri	10/24/2022, 10:25 A	Classic	~	•	

2. Select any Lightning app you would like to add the Newtel app, and click Edit.

16	NewTel	NewTel		10/24/2022, 10:55 A	Lightning (Managed)	~	•
17	Platform	Platform	The fundamental Lightnin	10/24/2022, 10:25 A	Classic		•
18	Playground Starter	Playground_Starter	Get started with your Trail	10/24/2022, 10:25 A	Lightning (Managed)	~	•
19	Sales	Sales	The world's most popular	10/24/2022, 10:25 A	Classic		•
20	Sales	LightningSales	Manage your sales proces	10/24/2022, 10:25 A	Lightning	~	•
21	Sales Console	LightningSalesConsole	(Lightning Experience) Let	10/24/2022, 10:25 A	Lightning	~	
22	Salesforce Chatter	Chatter	The Salesforce Chatter so	10/24/2022, 10:25 A	Classic	Edit 2	
23	Salesforce for Outlook	Salesforce_for_Outlook	A powerful Outlook integr	10/24/2022, 10:25 A	Connected (Managed,		
24	Salesforce Mobile Dashbo	Salesforce_Mobile_Dashb	The Salesforce.com Analyt	10/24/2022, 10:25 A	Connected (Managed)		•
25	Salesforce Touch	Salesforce_Touch	Salesforce Touch is Salesf	10/24/2022, 10:25 A	Connected (Managed)		•



3. Navigate to **Utility Items (Desktop Only)**, click **Add Utility Item**, then select **Open CTI Softphone** from the list.

÷	T Lightning App Builder	🏚 App Settings	🎦 Pages 🗸	Sales Console				
Ар Ар Ар	p Settings op Details & Branding op Options	Utility It Give your u	Utility Items (Desktop Only) Give your users quick access to productivity tools and add background utility items to your app.					
1 01	tility Items (Desktop Only)	Add Uti	ity Item 2		Utility Bar Alignment Default 🔻			
Ni Ni	avigation Items avigation Rules	Q þearch		PROPERTIES History	↑ ↓ Remove			
Us	er Profiles	 Standard (17) Chatter Feed Chatter Publisher 		Label History	roperties			
		CRM Analytics	Dashboard Best Action	Icon O clock Panel Width	0			
		HistoryList ViewMacros		340 Panel Height 480	0			
		Notes Open CTI Soft	phone 3	✓ Start automa	atically			

4. Click Save.

+	🔲 Lightning App Builder	🏚 App Settings 📑	j Pages ∨	Sales Console	? Help
App App App Utili	Settings Details & Branding Options ity Items (Desktop Only)	Utility Items Give your users o Add Utility Ite	Utility Items (Desktop Only) Give your users quick access to productivity tools and add background utility items to your app. Add Utility Item Default		
Navi	igation Rules r Profiles	● Histor ● Notes	, y	PROPERTIES Open CTI Softphone Utility Item Properties Label Phone Icon Con Con Con Con Con Con Con C	
				Cancel	