

SmartChoice Salesforce CTI Integration - Add New User

1. Go to Settings

| | | Call Details 🗸 Reports 🗸 Chatter Groups 🗸 | Calendar V People V Cases V Forecasts |
|------|----------|---|--|
| | | elationships med by me and created in the last 90 days | Build Pipeline Leads owned by me and created in the last 30 days |
| | | 0 Upcoming Activity 2 Past Activity 0 No Activity | 0 Upcoming Activity 0 e 0 Past Activity Leads 0 No Activity |
| 2. (| Click on | Setup | |
| | | Call Details V Reports V Chatter Groups V | Calendar V People V C Setup C V C V C V C V C V C V C V C V C V C |
| | | elationships med by me and created in the last 90 days | Build Pipeline Leads owned by me and created |
| | | 2 Contacts 0 Upcoming Activity 2 Past Activity 0 No Activity | 0 Upcoming Activity 0 0 Past Activity Leads 0 No Activity |



3. In the search bar, look for 'Custom Settings'



4. Click on "Custom Settings"





5. On the Custom Settings options, click on Manage

| Custom Settings | Custom Settings | | | |
|--|---|------------|---------------|--|
| Didn't find what you're looking for? Try using Global Search. | Use custom settings to create and manage custom data at the organization, profile, and user levels. Custo Visualforce, Apex, and the Web Services API. | | | |
| | View: All Create New View | | | |
| | Action Label ↑ | Visibility | Settings Type | |
| | Manage 📩 ClickToCallDetails | Public | Hierarchy | |
| | | | | |

Click the 'New' button at the top of the user list. (Do not click 'New' under the 'ClickToCallDetails' heading.)

xample, if your application had a setting for country codes, each set might include the country's name and dialing code.

ile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or



7. Set the Location to 'User'

| vide values for the fields you created. This data is o | ached with the application. | | |
|--|-----------------------------|-------------|--|
| dit ClickToCallDetails | | Save Cancel | |
| ClickToCallDetails Information | | | |
| Location | Profile 🗸 | <u></u> | |
| ClickToCall URL | Profile | | |
| Extension Number | User | | |
| SIP Password | | | |
| | | | |



8. Select the user to configure

| You can use "*" as a wildcard nex | t to other characters to improve your search results. |
|---------------------------------------|---|
| Recently Viewed Users | 2.4 |
| Full Nama | Role |
| Pvan Coe | Director, Channel Sales |
| Ryan Coe Scott Talley Test User | Director, Channel Sales |

9. Enter the ClickToCall URL below: https://omnicloud.smartchoiceus.com/ipps/v1/<user panel email address>/tel/call

Be sure to replace the user panel email address.

| ClickToCallDetails Edit Provide values for the fields you created. This data is o | cached with the application. |
|--|------------------------------|
| Edit ClickToCallDetails | Save |
| ClickToCallDetails Information | |
| Location ClickToCall URL Extension Number SIP Password SIP Username | |

10. Enter the extension number

| ClickToCallDetails Edit Provide values for the fields you created. This data is o | cached with the application. |
|--|-------------------------------|
| Edit ClickToCallDetails | Save |
| ClickToCallDetails Information | |
| Location | User 🗸 Test User |
| ClickToCall URL | panel email address>/tel/call |
| Extension Number | |
| SIP Password | |
| SIP Username | |



11. Enter the users User Panel password

| | Save Cancel |
|-------------------------------|------------------------------|
| | |
| lickToCallDetails Information | |
| Location | User 🗸 Test User |
| ClickToCall URL | https://omnicloud.smartchoic |
| Extension Number | 101 |
| SIP Password | |

12. Enter the user panel email address

de values for the fields you created. This data is cached with the application.

| lit ClickToCallDetails | Save Cancel |
|------------------------------|---|
| ickToCallDetails Information | |
| Location | User 🗸 Test User |
| ClickToCall URL | https://omnicloud.smartchoic |
| Extension Number | 101 |
| SIP Password | <pre> <pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre> |
| SIP Username | <pre>cpanel email address></pre> |

13. Click Save

| ም stom Settings | | | | | |
|---|--|-------------|--|--|--|
| CallDetails Edit | ached with the application. | | | | |
| CallDetails | | Save Cancel | | | |
| Location ClickToCall URL Extension Number SIP Password SIP Username | User V Test User https://omnicloud.smartchoic 101 <panel password=""> <panel address="" email=""></panel></panel> | | | | |