

## **SmartChoice Salesforce CTI Integration**

1. On the top right menu click Setup

				*• • • • •	5
∽ Chatter	Groups 🗸 Calendar 🗸	People 🗸	Cases 🗸 Forecasts	Setup for curre Setup	/
elationships			Build Pipeline	Service Setup	
ined by me and cre	eated in the last 90 days		Leads owned by me and crea	sted	
0 Contacts	O Upcoming Activity     O Past Activity		0 Leads	O Upcoming Activity     O Past Activity	

2. Under Apps, click on App Manager

Sales Cloud Everywhere	Get Started
ADMINISTRATION	
> Users	
> Data	Most Recently Used
> Email	10 items
PLATFORM TOOLS	NAME
V Apps	supportforce
App Manager AppExchange Marketplace	Sales Console App Utility Bar
> Connected Apps	Service Console App Utility Bar
<ul> <li>External Client Apps</li> <li>Lightning Bolt</li> </ul>	ClickToCallDetails

## 3. Select the app where you want the call Pop-Up to appear, then click Edit

. Use it for real-time access to your Salesforce data, in a layout that's desi	7/18/2020 4:31 AM	Connected (Managed)		
	4/28/2023 9:44 AM	Connected		•
	12/6/2018 11:53 A	Classic	~	▼
ross customer service channels on one screen	12/6/2018 11:53 A	Lightning	~	
application, and manage content and published sites.	ation, and manage content and published sites. 12/6/2018 11:53 A Classic	Classic	Edit	
	1/13/2023 11:41 A	Connected		
	7/18/2020 4:31 AM	Connected		•
	3/18/2022 12:54 PM	Lightning	~	•
trators and developers to interact with Salesforce.com organizations via t	7/18/2020 4:31 AM	Connected (Managed)		



4. Click on Utility Items (Desktop Only).



## 5. Click on Add Utility Item

← 🖬 Lightning App Builder	🏟 App Settings	💾 Pages 🗸	Service Console	
App Settings	Utility Ite	ems (Desktop	Only)	
App Options	Give your u	sers quick access to	productivity tools and add background u	tility items to your app.
Utility Items (Desktop Only)	Add Utili	ity Item	Utility Bar Alignment 🚺	Default
Navigation Items	() His	tory	PROPERTIES	
Navigation Rules	₽ Not	₽ Notes		
User Profiles			✓ Utility Item	Properties
			Label	
			Icon	

6. Add the UtilityBarCalls component by Add Utility Item





7. Change the displayed name under 'Label' and displayed icon. (Optional)

4 UtilityBarCalls	PROPERTIES	Remove
◎ <sub>History</sub>	UtilityBarCalls	
₽ Notes	✓ Utility Item Properties	
	* Label	0
	Click to Call	
	Icon f fallback ×	0
	Panel Width	0
	340	
	Panel Height	0
	480	
	Start automatically	0

8. Set service to start automatically.

]
0
0
0
0
-

9. Save changes

