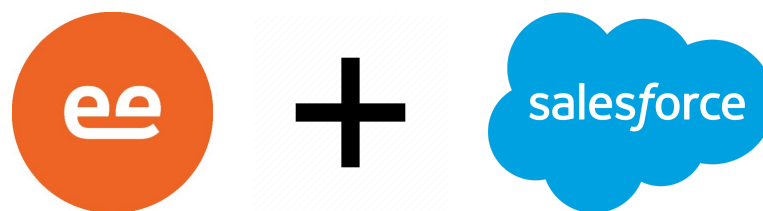


salesforce-integration



Requirements

1. Existing installation of AheevaCCS (v7.14.2+ or v8.1.0+)
2. Salesforce Lightning Experience (Essentials, Professional, Enterprise, Performance, Unlimited, or Developer Edition)

Note: Does not work on trial accounts

Supported Browsers

1. Google Chrome (Version 87.0.4280.67 or above)

Installation

Note: It is recommended that you test this integration on a sandbox environment prior to deploying it in production.

Please read the following instructions very carefully.

1. Log out of your salesforce console before proceeding with the next steps. This step is mandatory as the installation could seldom fail when you are trying to install the application while previously logged in.
2. Click on one of the links below depending on what kind of environment you are trying to install the application on.

For Production:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4x000000UQ0h>

For Testing:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4x000000UPs7>

For Sandbox:

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4x000000UQ0h>

3. You will be directed to the salesforce login screen. Enter your credentials and click "Connect".
4. After validating your credentials, salesforce will redirect to the app installation screen.

Installation screen:

Install Aheeva OpenCTI
By

Install for Admins Only

Install for All Users

Install for Specific Profiles...

Warning: You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install **Cancel**

5. Make a selection about which users you want the app to be available to. Ideally you would want to install the app only to few users. Choose the "Install for Specific Profiles" option for this use case.
6. Upon selecting the "Install for Specific Profiles" option, a "Select Specific Profiles" section will appear as shown below.

Profiles Section:

Select Specific Profiles

These security settings determine access to the custom objects and components installed in the package. It doesn't affect permissions for existing objects.

i Standard profiles (including the Read-Only profile) don't receive access to any installed custom objects. Because permissions are not editable for standard profiles, you must clone your profile to grant access.

Set access level for all profiles to
 No Access Set

Profile	Access Level
System Administrator	Full Access (Your profile must have full access to the package)
Identity User	No Access
Minimum Access - Salesforce	No Access
Standard User	<input checked="" type="checkbox"/> No Access <input checked="" type="checkbox"/> Full Access
Read Only	No Access
Solution Manager	No Access
Marketing User	No Access
Contract Manager	No Access

- Choose the level of access you want to assign for each profile to the app.
- Check "I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program." and click "Install".
- The installation process will begin. Once installed, click on the "Done" button.

Installation:

Install Aheeva OpenCTI

By

Installing and granting access to specific profiles...

App Name	Publisher	Version Name	Version Number
Aheeva OpenCTI		Aheeva OpenCTI v1.3	1.3

Description
Aheeva OpenCTI for Salesforce

[Additional Details](#) [View Components](#)

Completed Installation:

Install Aheeva OpenCTI

By

Installation Complete!

Done

App Name	Publisher	Version Name	Version Number
Aheeva OpenCTI		Aheeva OpenCTI v1.3	1.3

Description
Aheeva OpenCTI for Salesforce

Post Installation

After the installation of the app, we now need to configure the application. The configuration process can be broken down into the following tasks.

- Installing the "Disable Content-Security-Policy" chrome extension
- Configuring the Call Center
- Adding the OpenCTI telephone to the utility bar in your application view

4. Configuring the AheevaCCS Phone settings

Installing the "Disable Content-Security-Policy" chrome extension

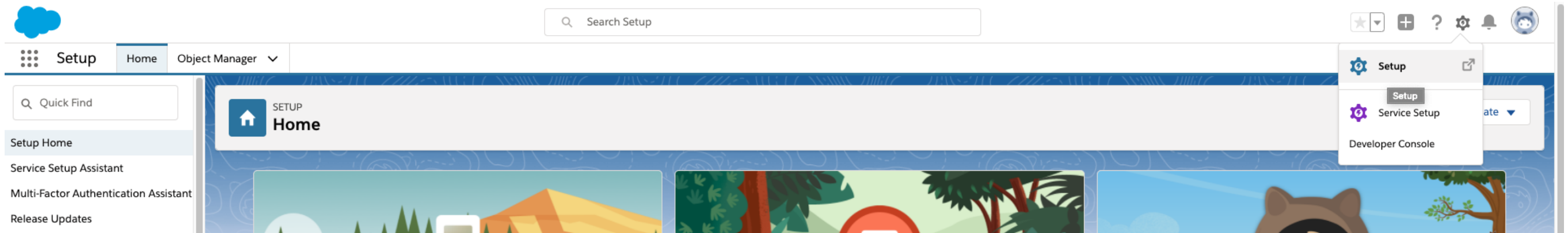
Due to several security protections enforced by browsers, some pages in the Salesforce console might face issues while loading. Install the following chrome extension to disable those protection.

<https://chrome.google.com/webstore/detail/disable-content-security/ieelmcmcagomplceebfedjlkxhpdn>

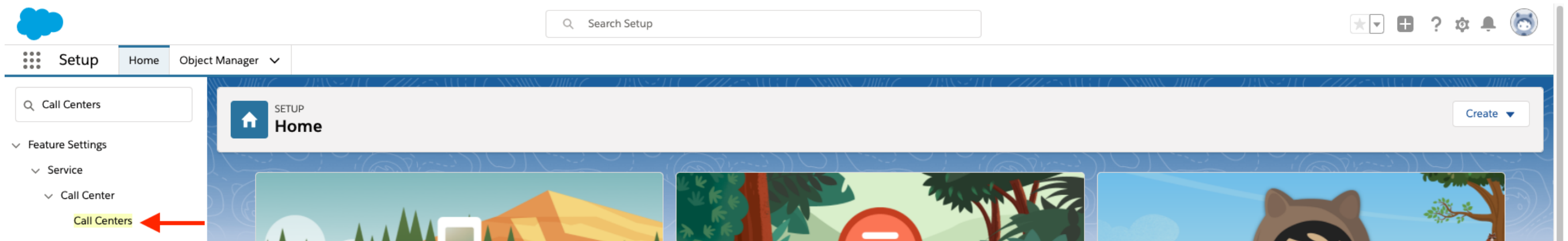
After you have installed this extension, navigate to your salesforce environment and click on the extension icon (the icon will turn red, indicating it is enabled). This will disable security policies only to salesforce related pages.

Configuring the Call Center

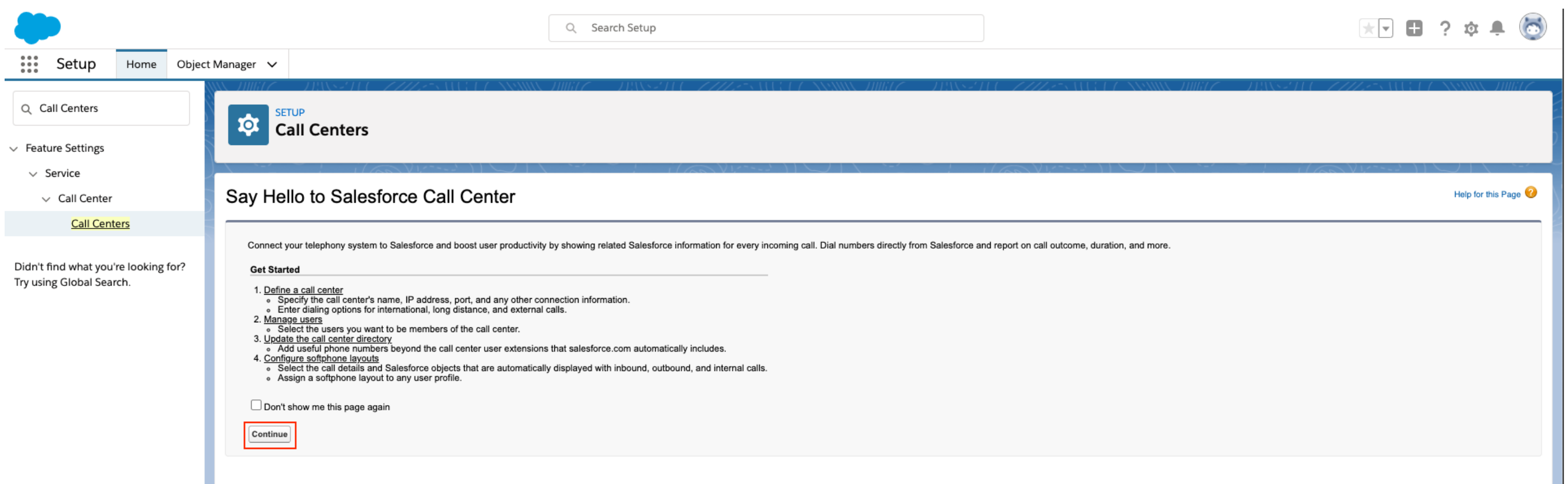
1. Log in to your salesforce environment.
2. Navigate to the "Setup" page by clicking on the gear icon on the header and selecting "Setup".



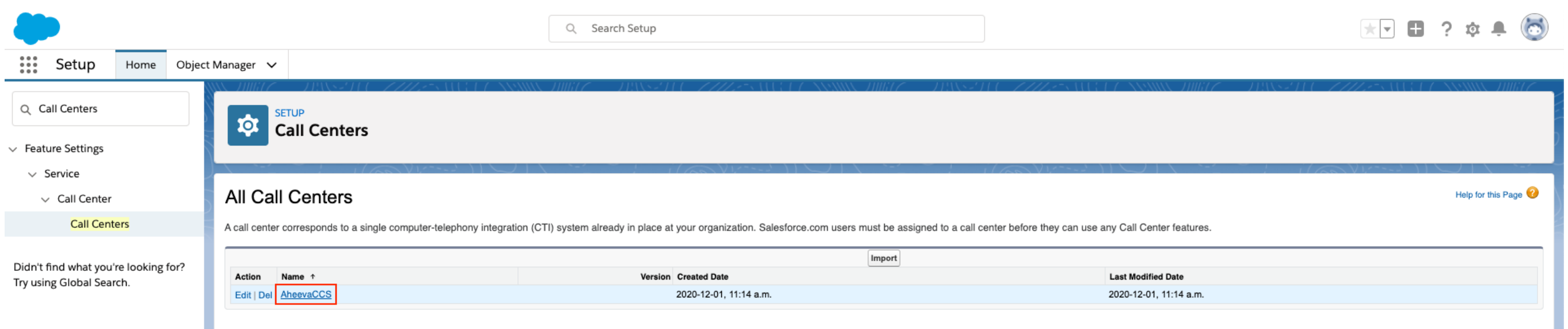
3. In the "Quick Find" box, type "Call Centers". In the list that appears on the left side of the screen, choose "Call Centers".



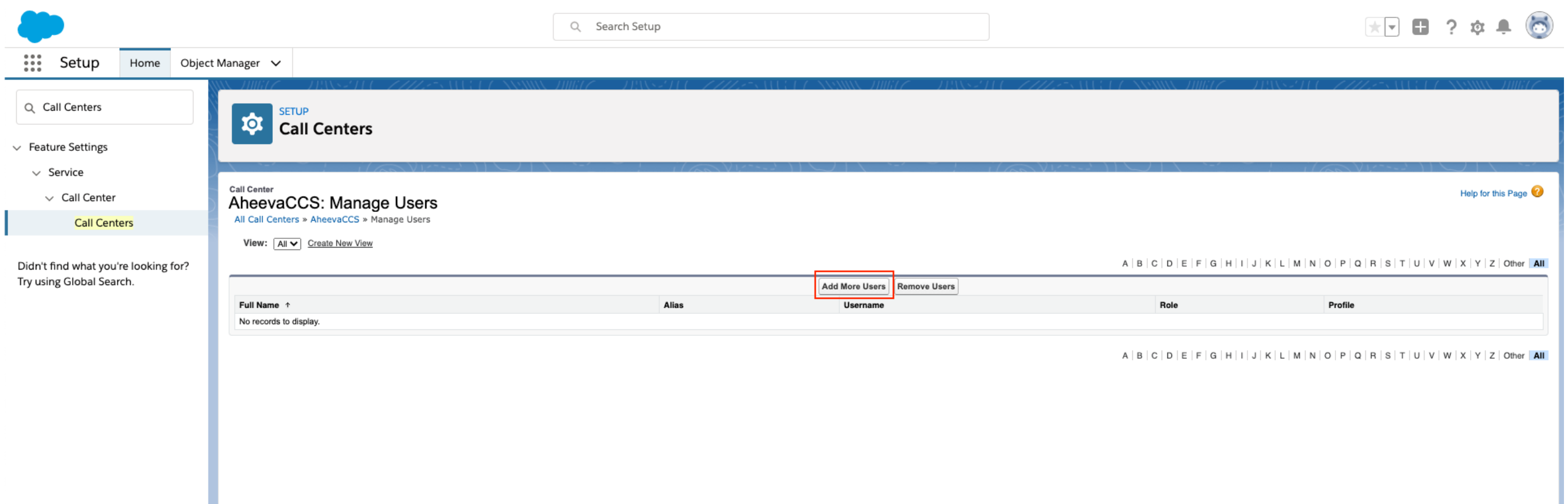
4. In the setup screen, click "Continue".



5. In the next screen you will be shown a list of call centers installed in your salesforce environment. Click on "AheevaCCS".



6. In the following screen, click on the "Add More Users" button.



7. In the following screen click the "Find" button and choose the users you want the AheevaCCS Phone to be available to, and click on the "Add to Call Center" button.

Call Center
AheevaCCS: Search for New Users

All Call Centers » AheevaCCS » 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: 2020-12-02
- For date/time fields, enter the value in following format: 2020-12-02, 6:21 p.m.

Find

Add to Call Center Cancel

Full Name	Alias	Username	Role	Profile
<input type="checkbox"/> Doe	1022	someone@aheeva.com		Partner App Subscription User
<input checked="" type="checkbox"/> Doe_Jane	8888	jane@aheeva.com		Standard User
<input checked="" type="checkbox"/> Doe_John	8888	demow@aheeva.com		Standard User
<input checked="" type="checkbox"/> Khoury_Chadi	chadi	chadi.khoury@aheeva.com		System Administrator
<input checked="" type="checkbox"/> Ravichandran_Praveen	PRavi	praveen@aheeva.com		System Administrator
<input type="checkbox"/> User_Integration	integ	integration@00d4w000007nqjuac.com		Analytics Cloud Integration User
<input type="checkbox"/> User_Security	sec	insightsecurity@00d4w000007nqjuac.com		Analytics Cloud Security User

Adding the OpenCTI telephone to the utility bar in your application view

1. Navigate to the "App Manager" section in the setup page.
2. A list of apps currently in use appears.
3. Click on the dropdown next to the app you want to add the AheevaCCS Phone to.
4. Click on the "Edit" option.

Steps 1-4 are shown in the image below:

Lightning Experience App Manager

20 items - Sorted by App Name - Filtered by All appnuitems - TabSet Type

App Name	Developer Name	Description	Last Modified Date	App Type	Visibl...
1 Aheeva	Aheeva	Aheeva	2020-12-01, 11:19 AM	Connected	
2 All Tabs	AllTabSet		2020-10-08, 11:00 AM	Classic	
3 Analytics Studio	Insights	Build Einstein Analytics dashboards and apps	2020-10-08, 10:58 AM	Classic	✓
4 App Launcher	AppLauncher	App Launcher tabs	2020-10-08, 10:58 AM	Classic	✓
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	2020-10-08, 10:58 AM	Lightning	✓
6 Community	Community	Salesforce CRM Communities	2020-10-08, 10:58 AM	Classic	✓
7 Content	Content	Salesforce CRM Content	2020-10-08, 10:58 AM	Classic	✓
8 Lightning Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	2020-10-08, 10:59 AM	Lightning	✓
9 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	2020-10-08, 10:58 AM	Lightning	✓
10 Marketing	Marketing	Best-in-class on-demand marketing automation	2020-10-08, 10:58 AM	Classic	✓
11 Platform	Platform	The fundamental Lightning Platform	2020-10-08, 10:58 AM	Classic	✓
12 Queue Management	QueueManagement	Create and manage queues for your business.	2020-10-14, 3:46 AM	Lightning	✓
13 Sales	Sales	The world's most popular sales force automation (SFA) solution	2020-10-08, 10:58 AM	Classic	✓
14 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	2020-10-08, 10:58 AM	Lightning	✓
15 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	2020-10-08, 10:58 AM	Lightning	✓
16 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	2020-10-08, 10:58 AM	Classic	✓
17 Salesforce CMS	SalesforceCMS	Manage content and media for all of your sites.	2020-10-08, 10:58 AM	Lightning	✓
18 Service	Service	Manage customer service with accounts, contacts, cases, and more	2020-10-08, 10:58 AM	Classic	✓
19 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen	2020-10-08, 10:58 AM	Lightning	✓
20 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and manage content and published sites.	2020-10-08, 10:58 AM	Classic	✓

5. In the "App Settings" page, click on the "Utility Items".
6. Add the "Open CTI Softphone" by using the "Add Utility Item" button.
7. From the properties pane, set the panel width to '350' and the panel height to '600' as shown below.

The screenshot shows the Salesforce Lightning App Builder interface. The top navigation bar includes "Lightning App Builder", "App Settings", "Pages", and "Service Console". The "App Settings" section is active, with "Utility Items (Desktop Only)" selected. The "Add Utility Item" button is highlighted. A search bar contains "Open CTI". Under "Standard (1)", the "Open CTI Softphone" item is selected. A tooltip provides details: "Open CTI Softphone. Make and receive calls, add call notes, and log call information using a third-party telephony system. Supported form factors: desktop". The "Properties" panel for "Open CTI Softphone" shows:

- Label: Phone
- Icon: call X
- Panel Width: 350
- Panel Height: 600
- Start automatically:

8. Navigate to your app, preferably in a new tab. You will find that the "AheevaCCS Phone" has been added to the utility bar at the bottom of your screen.

The screenshot shows the Salesforce Service Console interface. The top navigation bar includes "Service Console" and "Accounts". The "Accounts" section is active, showing a list of "Recently Viewed" accounts. The utility bar at the bottom of the screen shows a "Phone" icon, which is highlighted with a red box. The "History" icon is also visible next to it.

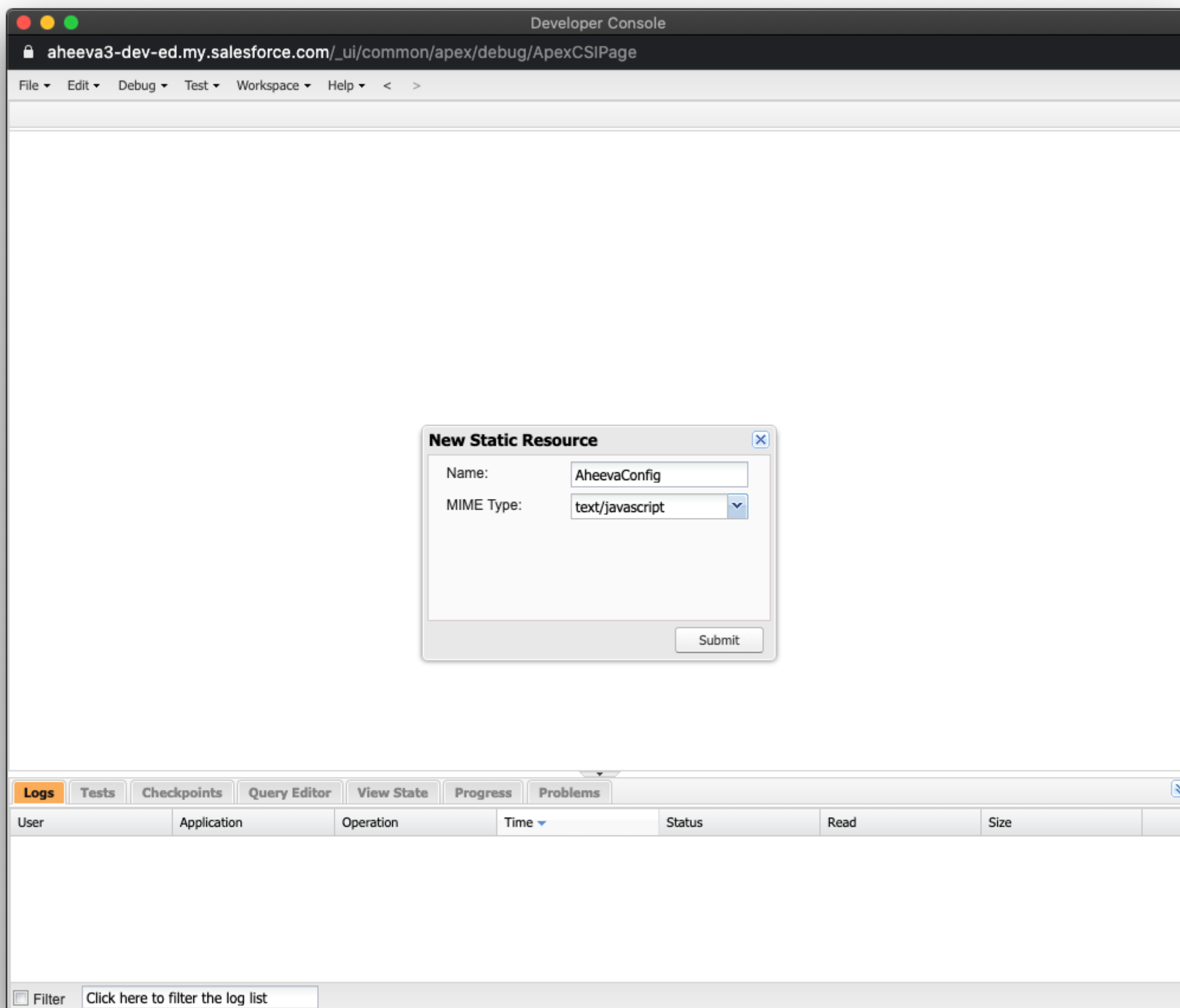
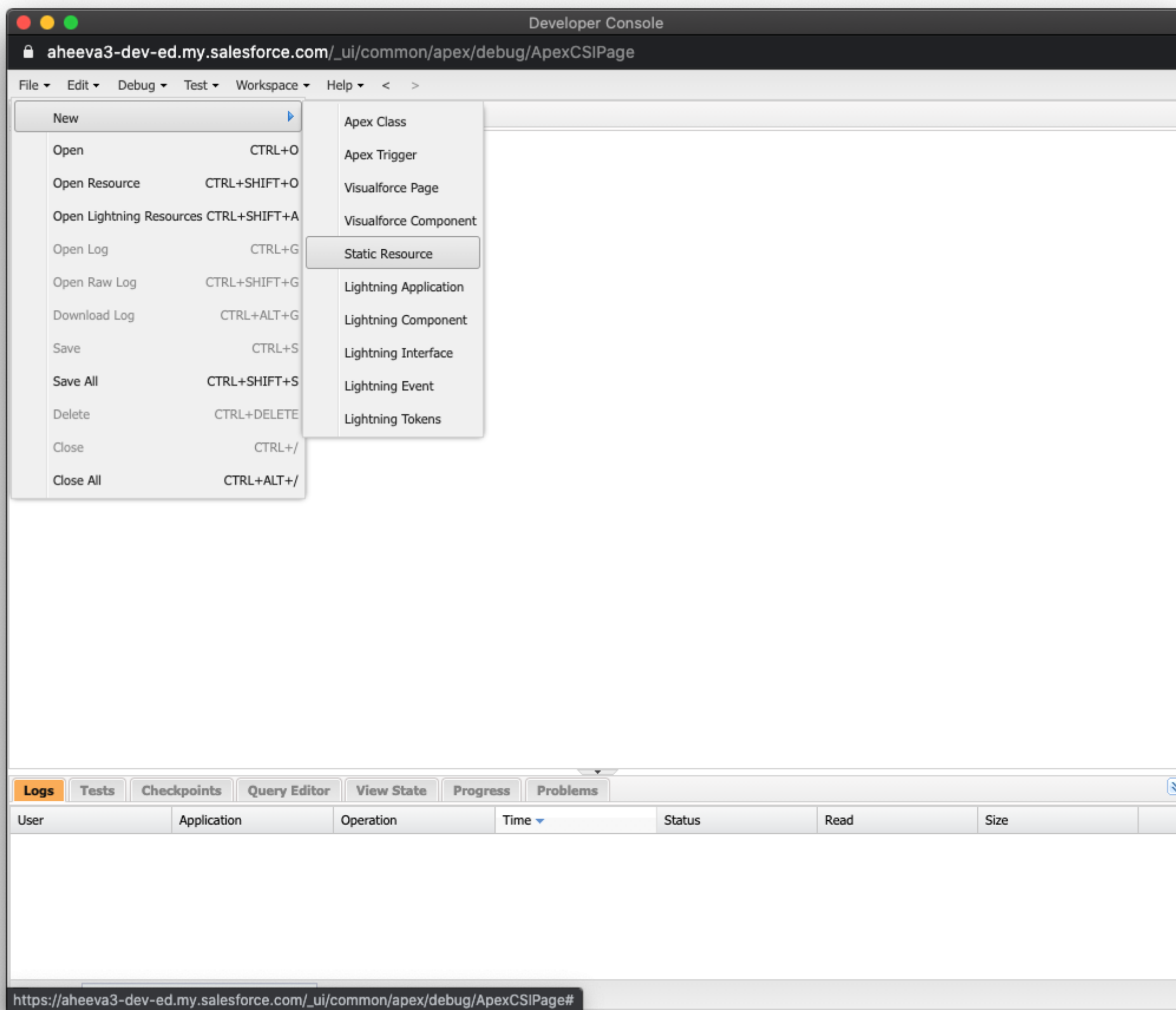
Account Name	Account Site	Phone	Account Owner Alias
1 United Oil & Gas Corp.		(212) 842-5500	PRavi
2 Pyramid Construction Inc.		(014) 427-4427	PRavi
3 Burlington Textiles Corp of America		(514) 714-9495	PRavi
4 Grand Hotels & Resorts Ltd		(312) 596-1000	PRavi

Configuring the AheevaCCS Phone settings

1. Open the "Developer Console" from the menu on the header.

The screenshot shows the Salesforce Setup page. The top navigation bar includes "Setup" and "Home". The "Developer Console" menu item is highlighted with a red box in the top right corner of the page.

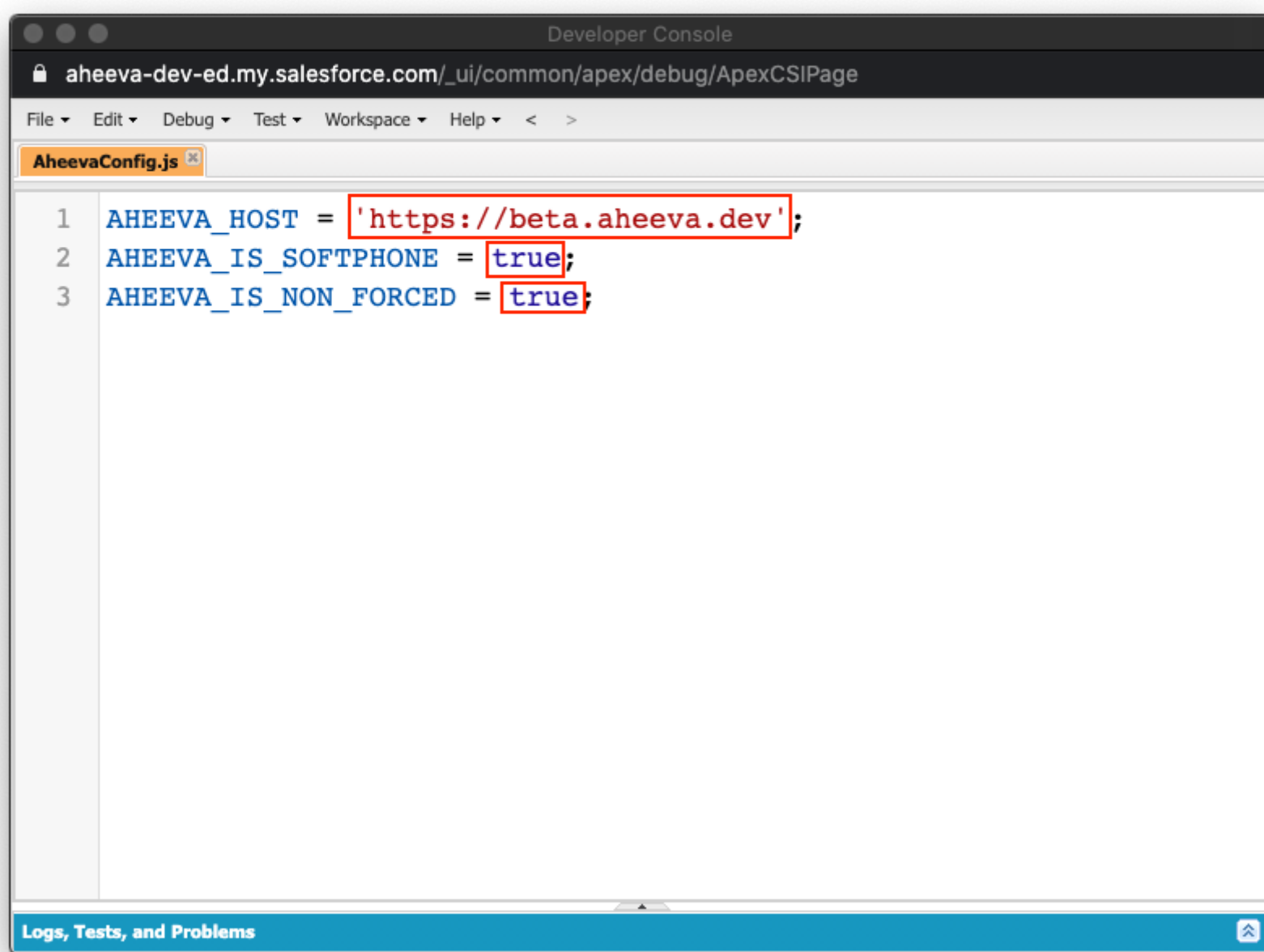
2. From the file menu, create a new static resource called "AheevaConfig" as shown below.



3. Copy and paste the following block of code, replacing the existing contents of the file.

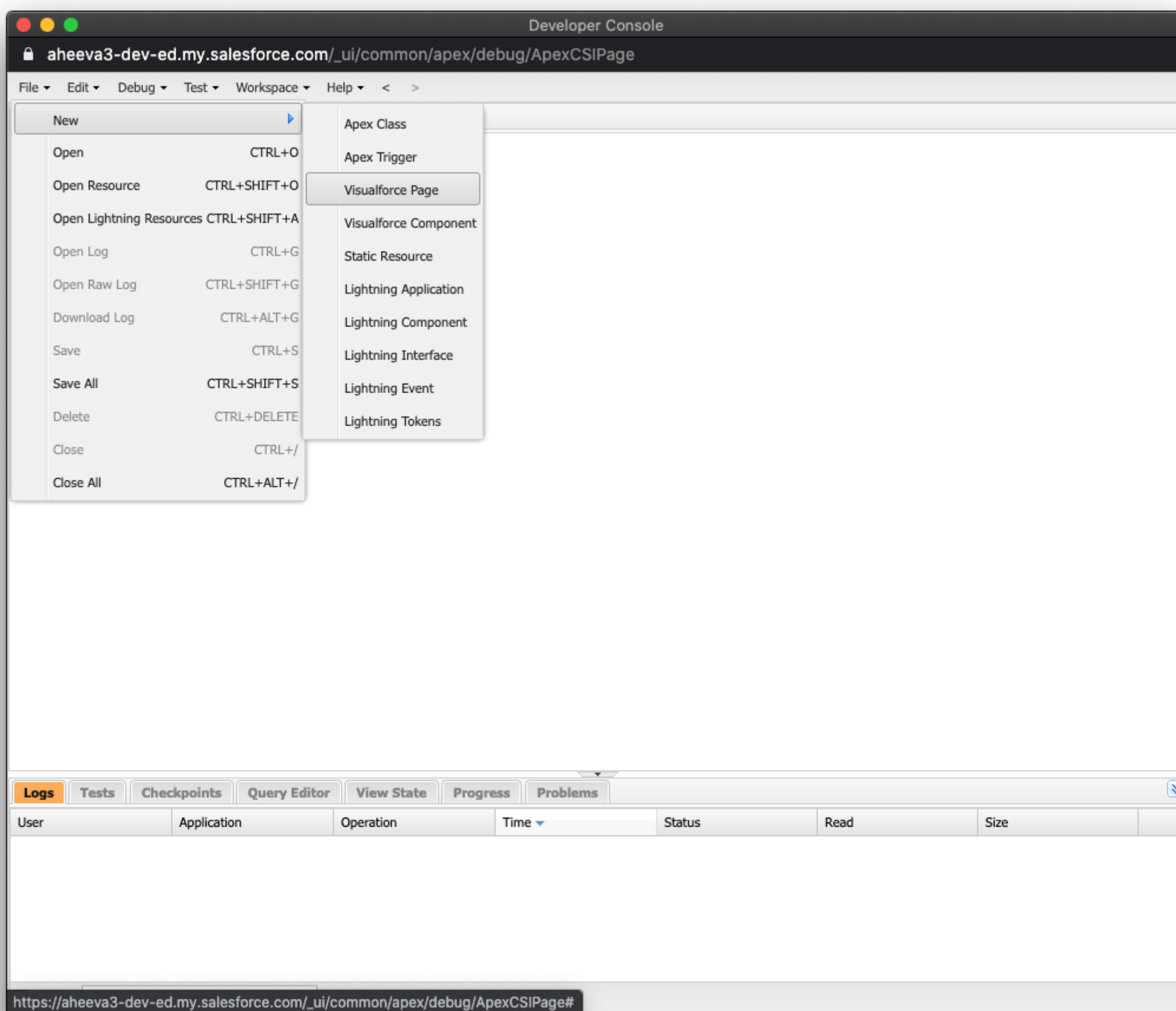
```
AHEEVA_HOST = 'https://beta.aheeva.dev';
AHEEVA_IS_SOFTPHONE = true;
AHEEVA_IS_NON_FORCED = true;
```

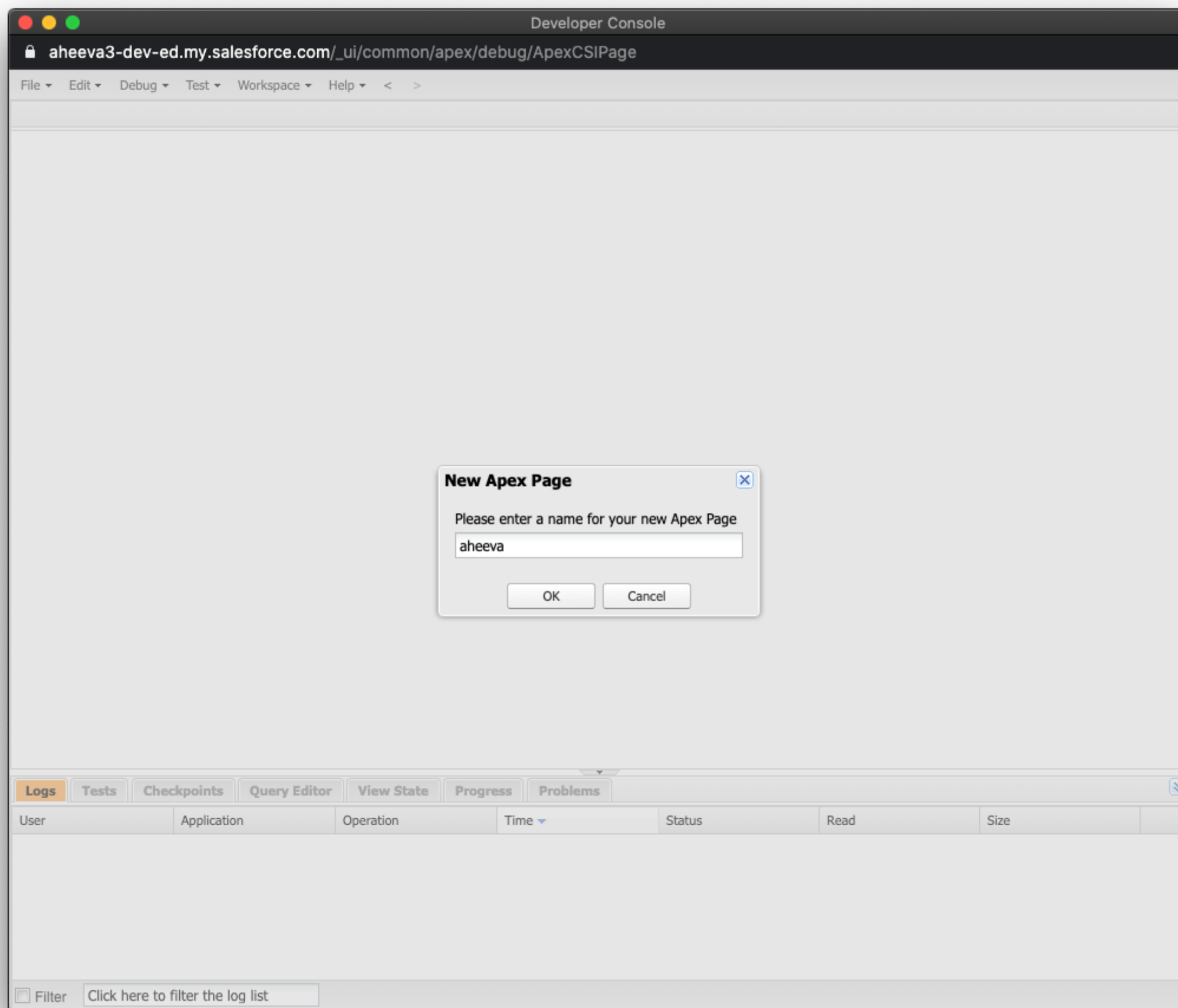
4. For the variable "AHEEVA_HOST", set the value as your Agent Application URL. For the variable "AHEEVA_IS_SOFTPHONE", set the value as true if the agents use a softphone like MicroSIP or Zoiper to connect their extension; set this value as false if the agents use WEBRTC to connect their extension. For the variable "AHEEVA_IS_NON_FORCED", set this value as true if the inbound calls received by the agent are of type "Non Forced"; set this value as false if the inbound calls received by the agent are of type "Forced".



5. Save the file.

6. From the file menu, create a VisualForce Page called "aheeva" as shown below.

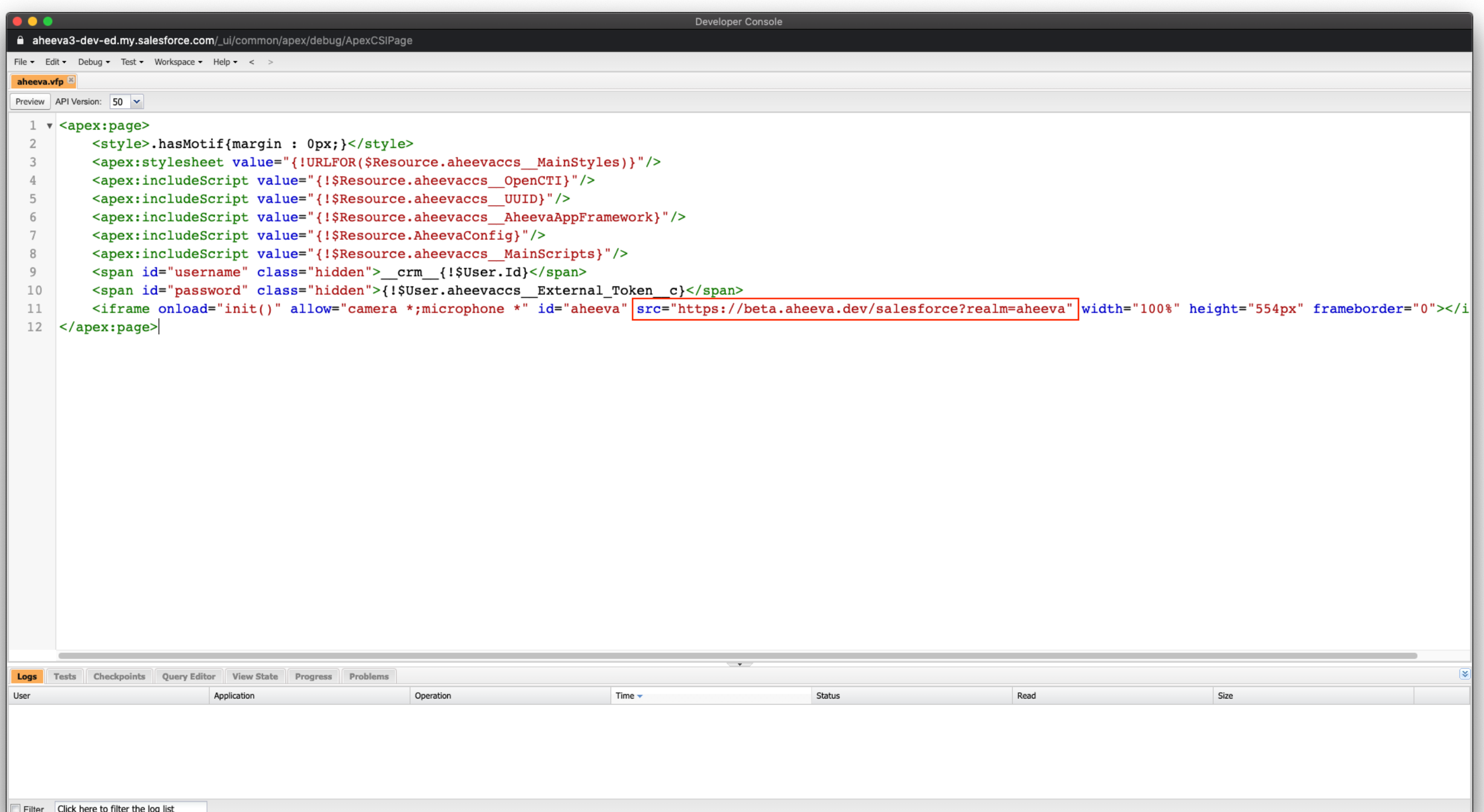




7. Copy and paste the following block of code, replacing the existing contents of the file.

```
<apex:page>
  <style>.hasMotif{margin : 0px;}</style>
  <apex:stylesheet value="{!URLFOR($Resource.aheevaccs__MainStyles)}"/>
  <apex:includeScript value="{!$Resource.aheevaccs__OpenCTI}"/>
  <apex:includeScript value="{!$Resource.aheevaccs__UUID}"/>
  <apex:includeScript value="{!$Resource.aheevaccs__AheevaAppFramework}"/>
  <apex:includeScript value="{!$Resource.AheevaConfig}"/>
  <apex:includeScript value="{!$Resource.aheevaccs__MainScripts}"/>
  <span id="username" class="hidden">__crm__ {!$User.Id}</span>
  <span id="password" class="hidden"> {!$User.aheevaccs__External_Token__c}</span>
  <iframe onload="init()" allow="camera *;microphone *" id="aheeva"
    src="https://beta.aheeva.dev/salesforce?realm=aheeva" width="100%" height="554px" frameborder="0"></iframe>
</apex:page>
```

8. Change the value of the URL (as shown in the boxed area) to the URL of the Agent Application along with the tenant realm.



9. Press "CTRL + S" to save the file, or click on the "Save" option from the file menu. You may now close the "Developer Console".

The setup process is now complete.

Creating a Connected App

1. Click on "New Connected App" button on the Lightning Experience App manager as shown below.

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Apps

App Manager

AppExchange Marketplace

> Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

> Lightning Bolt

> Mobile Apps

> Packaging

> Feature Settings

> Einstein

SEARCH Setup

NEW Lightning App

NEW CONNECTED APP

19 Items - Sorted by App Name - Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visibl...
1	All Tabs	AllTabSet		2020-12-09, 10:09 AM	Classic	
2	Analytics Studio	Insights	Build Einstein Analytics dashboards and apps	2020-12-09, 10:08 AM	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	2020-12-09, 10:08 AM	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	2020-12-09, 10:08 AM	Lightning	✓
5	Community	Community	Salesforce CRM Communities	2020-12-09, 10:08 AM	Classic	✓
6	Content	Content	Salesforce CRM Content	2020-12-09, 10:08 AM	Classic	✓
7	Lightning Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	2020-12-09, 10:09 AM	Lightning	✓
8	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	2020-12-09, 10:08 AM	Lightning	✓
9	Marketing	Marketing	Best-in-class on-demand marketing automation	2020-12-09, 10:08 AM	Classic	✓
10	Platform	Platform	The fundamental Lightning Platform	2020-12-09, 10:08 AM	Classic	
11	Queue Management	QueueManagement	Create and manage queues for your business.	2020-12-09, 10:09 AM	Lightning	✓
12	Sales	Sales	The world's most popular sales force automation (SFA) solution	2020-12-09, 10:08 AM	Classic	✓
13	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	2020-12-09, 10:08 AM	Lightning	✓
14	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	2020-12-09, 10:08 AM	Lightning	✓
15	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	2020-12-09, 10:08 AM	Classic	✓
16	Salesforce CMS	SalesforceCMS	Manage content and media for all of your sites.	2020-12-09, 10:08 AM	Lightning	✓
17	Service	Service	Manage customer service with accounts, contacts, cases, and more	2020-12-09, 10:08 AM	Classic	✓
18	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen	2020-12-09, 10:08 AM	Lightning	✓

2. Fill in the details as shown below.

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Apps

App Manager

AppExchange Marketplace

> Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

> Lightning Bolt

> Mobile Apps

> Packaging

> Feature Settings

> Einstein

SEARCH Setup

NEW Lightning App

NEW CONNECTED APP

Connected App Name: **Aheeva**

API Name: **Aheeva**

Contact Email: **support@heeva.com**

Contact Phone:

Logo Image URL: Upload logo image or Choose one of our sample logos

Icon URL: Choose one of our sample logos

Info URL:

Description:

API (Enable OAuth Settings)

Enable OAuth Settings:

Enable for Device Flow:

Callback URL: **https://beta.aheeva.dev:4343/api/salesforce/oauth/tenant/1/callback**

Use digital signatures:

Selected OAuth Scopes:

- Access and manage your data (api)
- Access your basic information (id, profile, email, address, phone)
- Perform requests on your behalf at any time (refresh_token, offline_access)
- Provide access to your data via the Web (web)

Available OAuth Scopes:

- Access Pardot services (pardot_api)
- Access and manage your Chatter data (chatter_api)
- Access and manage your Eclair data (eclair_api)
- Access and manage your Wave data (wave_api)
- Access custom permissions (custom_permissions)
- Allow access to your unique identifier (openid)
- Full access (full)
- Provide access to custom applications (visualforce)

3. Set the value for "Callback URL" as:

```
https://{{AHEEVACCS_REST_SERVER_IP}}:{{AHEEVACCS_REST_SERVER_PORT}}/api/salesforce/oauth/tenant/{{AHEEVACCS_TENANT_ID}}/callback
```

For example:

```
https://beta.aheeva.dev:4343/api/salesforce/oauth/tenant/1/callback
```

4. Assign the specified API scopes as seen in the screenshot above. Click on the "Save button".
5. After saving, from the screen that appears, copy down the "Consumer Key", "Consumer Secret" and the "Callback URL" values.

The screenshot shows the Salesforce Setup page for 'Manage Connected Apps'. The app name is 'Aheeva'. The configuration includes:

- Version:** 1.0
- API Name:** Aheeva
- Created Date:** 2020-12-14, 12:00 p.m.
- Contact Email:** support@aheeva.com
- Last Modified Date:** 2020-12-14, 12:00 p.m.
- API (Enable OAuth Settings):**
 - Consumer Key:** 3MVG9KBt168mda_VJ0tqjbCornsOYhUinGzLayDOL4BanuOZ8cqUeYIEZdHQq_TKh7.495dMdPT.Z2EXoHE0
 - Consumer Secret:** 39A28BEEB1438F6B1105F6ADB8622C298B74A5EACFCAD3C8AB504F0E905BCC2
 - Selected OAuth Scopes:** Access your basic information (id, profile, email, address, phone), Access and manage your data (api), Provide access to your data via the Web (web), Perform requests on your behalf at any time (refresh_token, offline_access)
 - Callback URL:** https://v8.aheeva.dev:4343/api/salesforce/oauth/tenant/1/callback
- Initial Access Token for Dynamic Client Registration:** Generate
- Custom Connected App Handler:** Apex Plugin Class, Run As
- Trusted IP Range for OAuth Web Server Flow:** New

Integration with AheevaCCS Manager

- Now, navigate to the "Salesforce" module inside the "Integrations" menu item in the AheevaCCS Manager.

The screenshot shows the Aheeva Manager interface. The 'Integrations' menu is open, and the 'Salesforce' option is highlighted with a red box. Other options visible include 'zendesk' and '(api)'.

- Copy and paste the values for "Consumer Key", "Consumer Secret" and the "Callback/Redirect URL" from above and click on the "Connect" button.

This screenshot is identical to the previous one, showing the Aheeva Manager interface with the 'Salesforce' option highlighted in the 'Integrations' menu.

- A login box might appear. Enter your salesforce login credentials and approve the authentication request.
- Once authenticated, a list of agents are shown on the screen. You can map the agents inside AheevaCCS with salesforce users and click "Save". Do this for the all the agents that use salesforce.

Manager Aheeva / Integration praveen

Salesforce

Mappings Account

Search

Login ID	Agent	Mapped Salesforce User	Actions
1001	Kamran K	Unmapped	
1002	1002 1002	Unmapped	
5555	Praveen Ravichandran	Praveen Ravichandran	Save
8080	marwan m	Unmapped	
8888	John Doe	Unmapped	

8. Once mapped, the agents can login to their Salesforce console and the AheevaCCS Phone will automatically login the corresponding agent in the Agent Application and confirm their default extension.

Samples

AheevaCCS Phone after completing the setup

Service Console Accounts

Recently Viewed

4 items - Updated a few seconds ago

Account Name	Account Site	Phone	Account Owner Alias
United Oil & Gas Corp.		(212) 842-5500	PRavi
Pyramid Construction Inc.		(014) 427-4427	PRavi
Burlington Textiles Corp of America		(514) 714-9495	PRavi
Grand Hotels & Resorts Ltd		(312) 596-1000	PRavi

Phone

aheeva 00:00:07

Dashboard

Status **Connected**

Agent ID 5555
 Extension 5555
 Group Name Grp_A
 Team Name Not Set
 Agent Type Blended

Performance Statistics

Total Calls Handled 0
 Average Calls Handled (per hr.) 0
 Average Handling Time 00:00

Last Updated: 12/3/20, 1:31 PM

Phone History

Manual Dial using Click to Call

https://raw.githubusercontent.com/aheeva/salesforce-integration/master/assets/images/manual_dial.mp4

Support

For any queries related to the setup/installation, please contact our support team.