

Phone Panel for Salesforce Lightning (Manual Configuration)

Follow these steps to manually configure Phone Panel for Salesforce Lightning. See [these instructions](#) for installing Phone Panel with a managed package

Import the Call Center Definition File

1. Go to https://knowledge.liveops.com/developer/Resources/3_Documentation and save the call center definition file named SFDC_Call_Center_XML.xml file.

Alternatively, save the following as an XML file:

```
<callCenter>
<section sortOrder="0" name="reqGeneralInfo" label="General Information">
<item sortOrder="0" name="reqInternalName"
label="InternalNameAAA">LOSandBoxOpenCTI</item>
<item sortOrder="1" name="reqDisplayName" label="Display Name">LOSandBox
Open CTI</item>
<item sortOrder="2" name="reqAdapterUrl" label="CTI Adapter
URL">https://<callcenter_name>/mason/ccbridge/sfdc-
proxy.html?sfdcIFrameOrigin=1</item>
<item sortOrder="3" name="reqUseApi" label="Use CTI API">>true</item>
<item sortOrder="4" name="reqSoftphoneHeight" label="Softphone
Height">300</item>
<item sortOrder="5" name="reqSoftphoneWidth" label="Softphone
Width">500</item>
<item sortOrder="6" name="reqSalesforceCompatibilityMode"
label="Compatibility Mode">Classic_and_Lightning</item>
</section>
<section sortOrder="1" name="reqDialingOptions" label="Dialing Options">
<item sortOrder="0" name="reqOutsidePrefix" label="Outside Prefix">9</item>
<item sortOrder="1" name="reqLongDistPrefix" label="Long Distance
Prefix">1</item>
<item sortOrder="2" name="reqInternationalPrefix" label="International
Prefix">01</item>
</section>
</callCenter>
```

2. Open the XML file and edit the CTI Adapter URL to include your Call Center.

For example, if you log in to Call Center at <https://companyabc.hostedcc.com>, update https://<callcenter_name>/mason/ccbridge/sfdc-proxy.html?sfdcIFrameOrigin=1 in the XML to <https://companyabc.hostedcc.com/mason/ccbridge/sfdc-proxy.html?sfdclFrameOrigin=1>.

3. Save the changes.
4. Log in to your Salesforce organization.
5. Import the Call Center definition file SFDCPhonePanel.xml that you edited and saved.

See Importing a [Call Center Definition File](#) in Salesforce Help for detailed steps on importing call center files.

6. The Call Center will show in the list using the name that you provided it. If you didn't modify the name, it is called LOSandBoxOpenCTI by default.

Adding Users to the Call Center

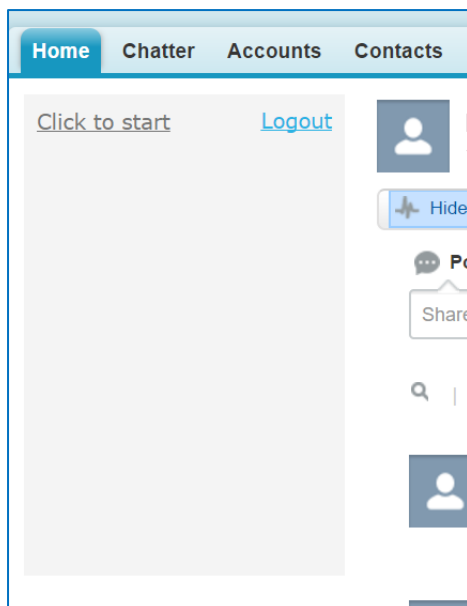
Following the instructions in [Adding a User to a Call Center](#) in Salesforce Help, add the Call Center to any users that will use Phone Panel in Salesforce Lightning. The Call Center is listed under the default name LO Sandbox Open CTI or the name that you gave it.

Validating the XML Configuration (Optional)

If you are currently accessing Salesforce in the classic view, you can check to ensure that you have configured the adapter URL in the XML file correctly.

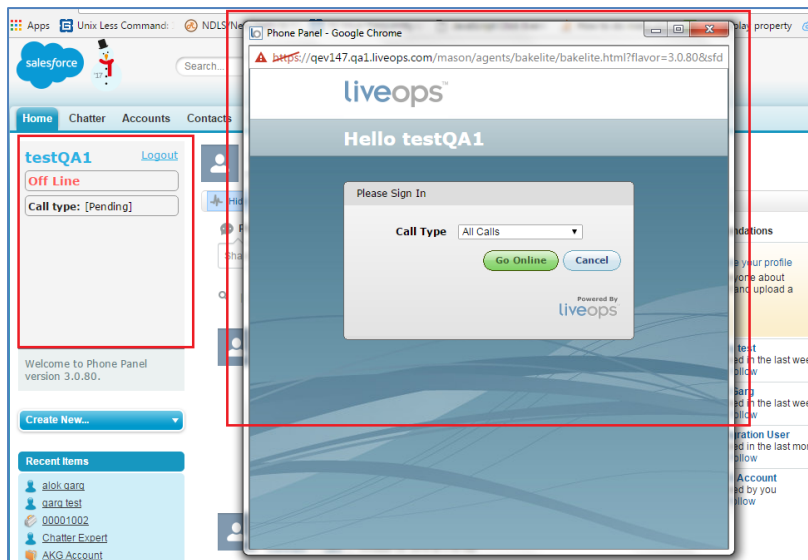
1. Click **Home**.

The Phone Panel login shows.



2. Click **Click to Start**.
3. Log in using your Phone Panel credentials.

Once logged in, the Phone Panel opens and works the same way as it does in the web version.



Add or Switch to the Lightning Experience

If your Salesforce organization doesn't currently have Lightning enabled, see [Enabling Lightning Experience](#) in Salesforce Help for steps on enabling it.

If your Salesforce organization has Lightning enabled, but you're currently working in the Classic view, switch to Lightning for the next configuration steps. See [Change your UI from Salesforce Classic to Lightning Experience](#) for more information.

Add an Open CTI Softphone Lightning App

In this next step, you'll create an Open CTI Softphone Lightning App so that users with the specified role can access Phone Panel in Lightning. For more information, see [Create a Custom Lightning Console App](#) in Salesforce Help.

1. In Setup, search for App Manager.
2. Click **Create New Lightning App**.
3. Enter the details for your Lightning app.

The name that you enter is how the app is listed in the App Launcher.

4. Click **Next**.
5. In App Options, select a Navigation Style.

By default, **Standard Navigation** is selected.

6. Click **Next**.
7. In Utility Details, click **Add**.
8. Select **Open CTI Softphone**.
9. Click **Next**.
10. In Select Items, select any additional items you want to include in the app.
11. Click **Next**.

12. In Assign User Profiles, select the user profiles that should have access to the Lightning App for Phone Panel.
13. Click the arrow to add the profiles to the column on the right.
14. Click **Done**.

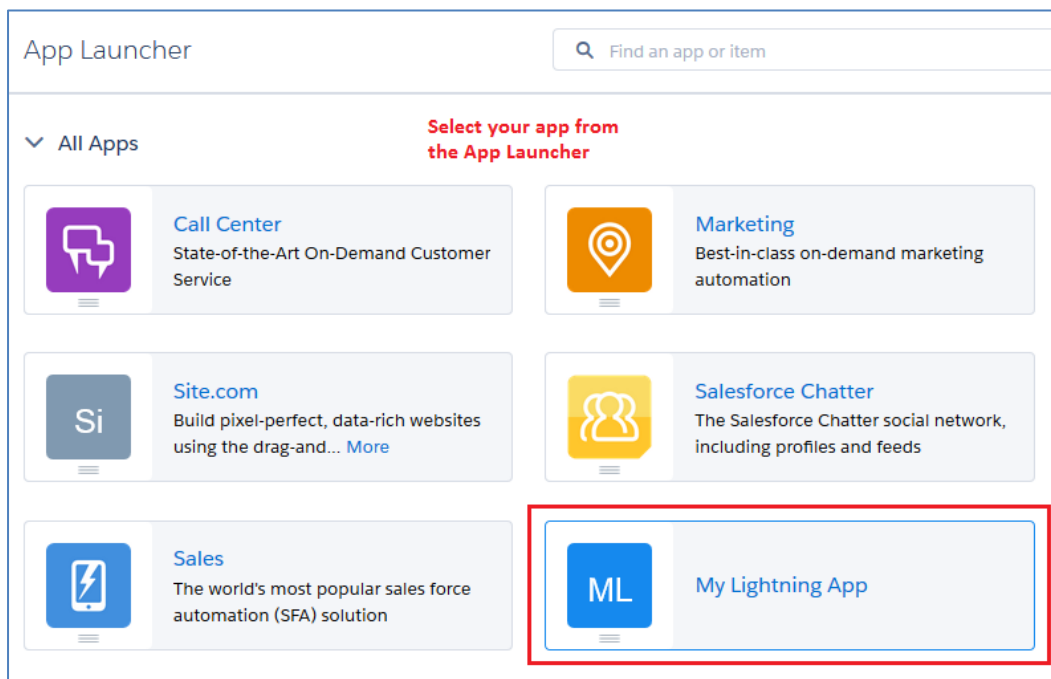
The app is now listed in Lightning Experience App Manager.


Access Phone Panel

To access Phone Panel in Lightning:

1. In the App Launcher, select the app you created.

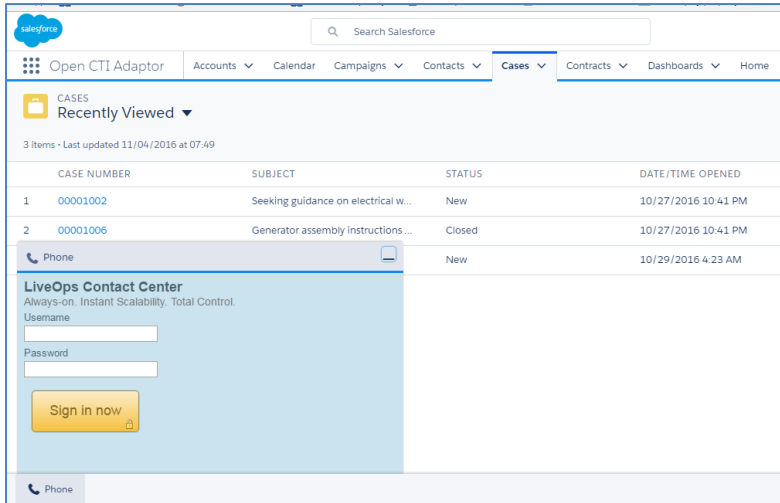
It is listed with the name that you entered in the app details.



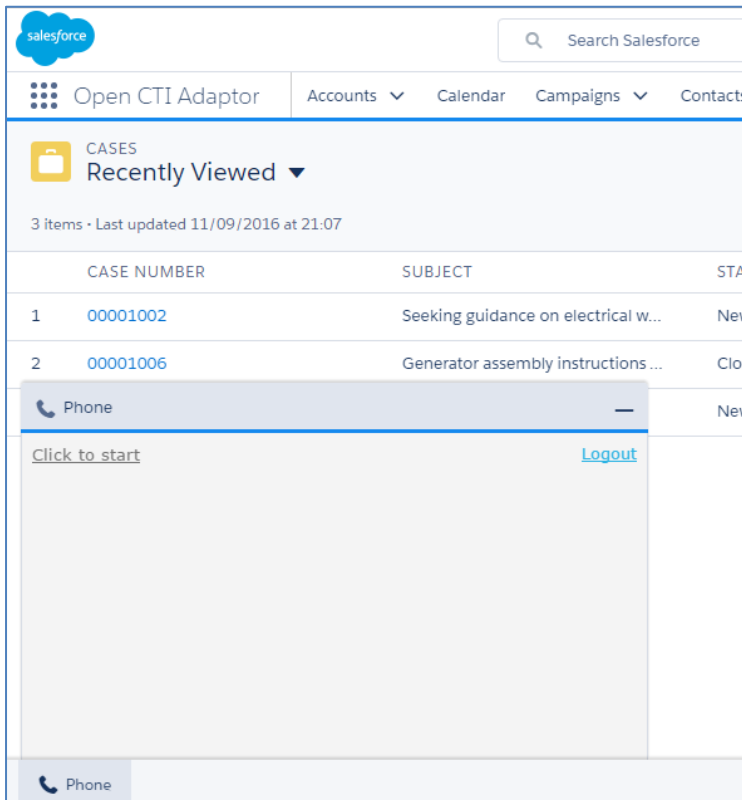
2. Click **Phone** ( Phone) at the bottom of the page.

Phone Panel opens.

3. Enter your username and password.
4. Click **Sign in now**.



5. Click **Click to Start**.



Phone Panel launches and you're ready to begin using it in Lightning.



Creating Call Center Reports

You may want to create new reports in Lightning to report on call activities and history. See [Create a Report](#) in Salesforce Help for more information.

Alternatively, refer to My Calls This Week and My Calls Today reports in Salesforce Classic. For more information, see [Salesforce CRM Call Center Reports](#).