

5.3 Salesforce Service

Bright Pattern Documentation

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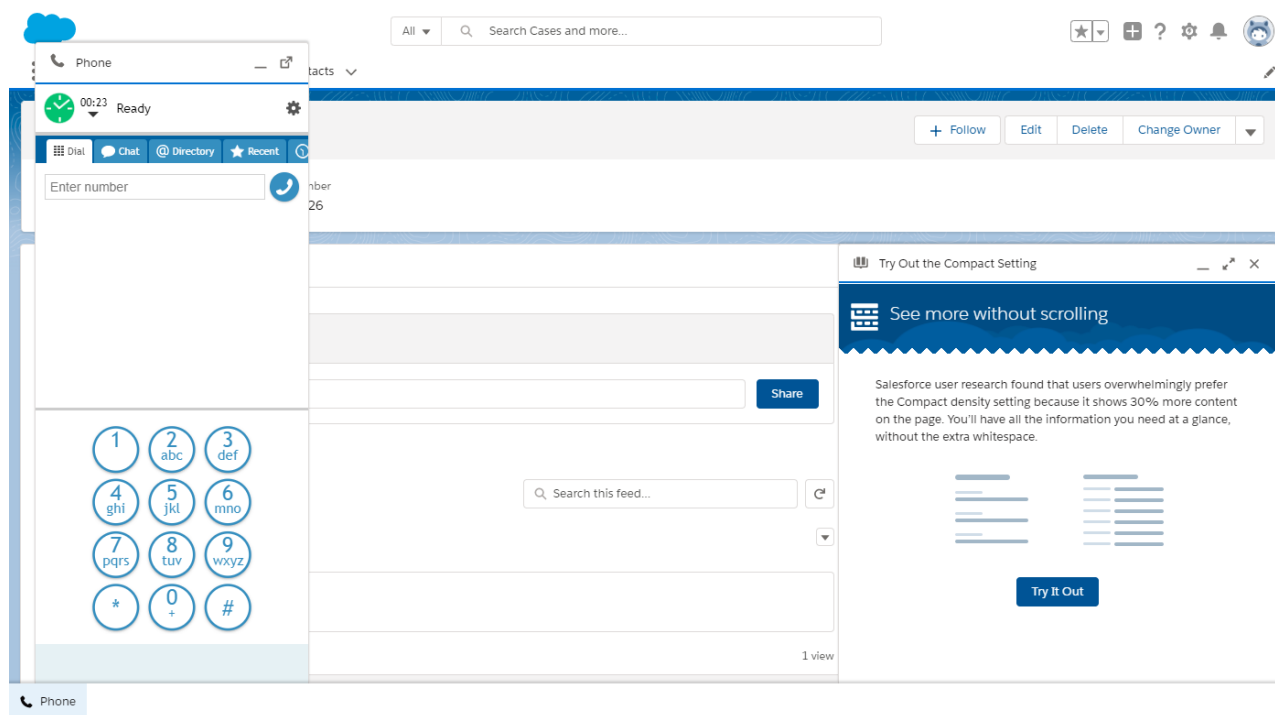
Service Overview

This section of the *Salesforce Integration Guide* explains how to integrate Bright Pattern Contact Center with Salesforce in Service Cloud view, placing the embedded Agent Desktop in your Service apps.

Service integration configuration is almost identical to Lightning integration configuration, with one exception when [creating a new Lightning app](#) to make the embedded Agent Desktop widget appear in your Service app. We recommend following Lightning integration configuration steps (see the following list), being sure to read the instructions carefully in section [Add Connected App to Enable Scenarios to Access Salesforce Data](#).

Integration Steps

1. [Install Managed Package](#)
2. [Set up Call Center](#)
3. [Create a Lightning App](#)
4. [Add Connected App to Enable Scenarios to Access Salesforce Data](#)
5. [Enable Single Sign-On](#)
6. [Add Salesforce Integration Account in Bright Pattern](#)
7. [Enable Screen Pop for Multiple-Matching Records](#)



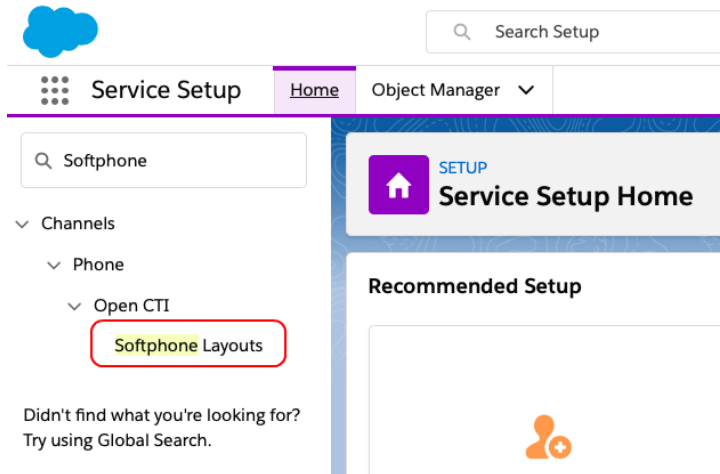
Salesforce Service

Enable Screen Pop for Multiple-Matching Records

In this article you will learn how to enable screen pop for multiple-matching records for your Salesforce integration. In your Salesforce account, you will edit softphone layouts in order to make the [Salesforce.com ScreenPop scenario block](#) to work.

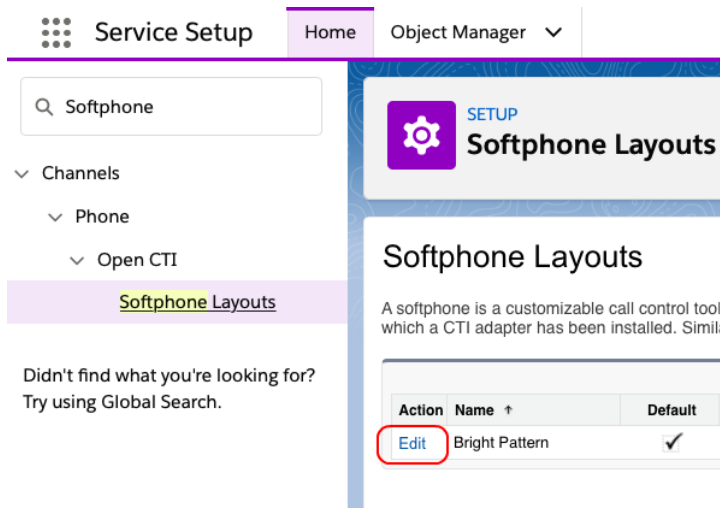
Note that you do not have to change any settings for screen pop of single-matching results, only for multiple-matching results.

1. In Salesforce *Service Setup*, search for **Softphone** and select **Softphone Layouts**.



Service > Setup > Channels > Phone > Open CTI > Softphone Layouts

2. On the *Softphone Layouts* page, select your layout and click **Edit**.



Click "Edit" beside the selected softphone layout

3. On the *Softphone Layout Edit* page, in the *Screen Pop Settings* section, expand the **Multiple-matching records** setting.

SETUP Softphone Layouts

Display these Salesforce.com objects.

- ▶ Account, Contact, Lead, Case [Add / Remove Objects](#)

- ▶ **If single Account found, display:** Account Name [Edit](#)
If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
- ▶ **If single Contact found, display:** Name [Edit](#)
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
- ▶ **If single Lead found, display:** Name [Edit](#)
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
- ▶ **If single Case found, display:** Case Number [Edit](#)
If multiple matches are found, only the Case Number is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

Screen Pop Settings [Help about this section ?](#)

- ▶ **Screen pops open within:** Existing browser window [Edit](#)
- ▶ **No matching records:** Pop to new Contact [Edit](#)
- ▶ **Single-matching record:** Pop detail page [Edit](#)
- ▶ **Multiple-matching records:** Don't pop any screen [Edit](#)

Screen Pop Settings

4. In *Multiple-matching records*, set **Pop to search page**.

Screen Pop Settings

- ▶ **Screen pops open within:** Existing browser window
- ▶ **No matching records:** Pop to new Contact
- ▶ **Single-matching record:** Pop detail page
- ▼ **Multiple-matching records:** Pop to search page
 - Don't pop any screen
 - Pop to search page
 - Pop to Visualforce page
 - Pop to flow

Pop to search page

5. Click **Save** at the top of the page.

Screen pop functionality is now enabled in your Salesforce account.

