

5.8 Lightning

Bright Pattern Documentation

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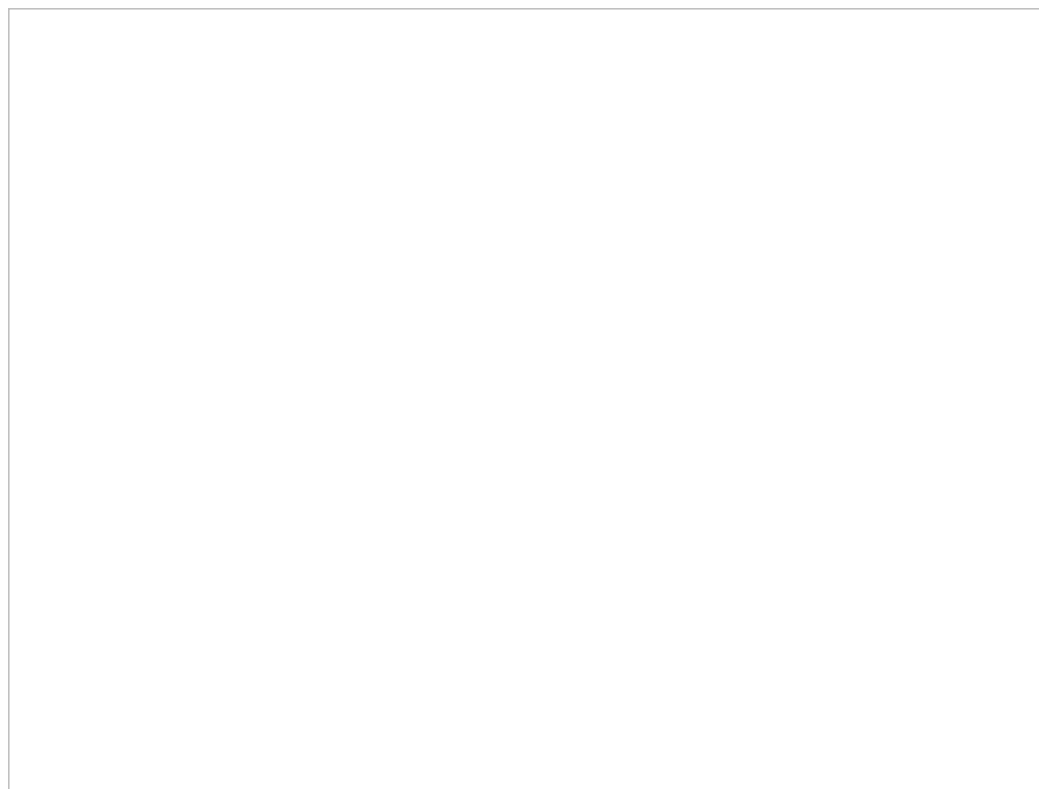
Lightning Overview

This section of the *Salesforce Integration Guide* explains how to integrate your Bright Pattern Contact Center with Salesforce in Lightning view.

For additional configuration options, see [Tutorials](#).

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 Lightning

Install a Managed Package in Salesforce Lightning

To get started on configuring Salesforce integration, you must install a managed package. Installation can be performed by developers in a production environment with proper permissions.

How to Install the Managed App

1. Click the following link to access the *Service Pattern Integration* package:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tE0000000IaCL>

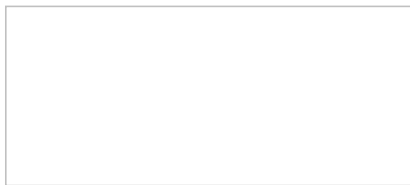
1. When prompted, log in with either your AppExchange account or your Salesforce credentials for your developer account. (If you do not already have a developer account, now is the time to [create and register](#) one.)
2. Choose where you will install the managed app (i.e., in your organization or sandbox).
3. Agree to the terms, confirm, and install.
4. You should receive an email from Salesforce Support confirming successful installation.

Call Center Setup

To configure a call center in Salesforce, you will need to define it using a call center definition file, which is used to support the integration of the Salesforce CRM call center with multiple CTI vendors. The first instance of a call center record for a particular CTI adapter must be defined by importing the adapter's call center definition file.

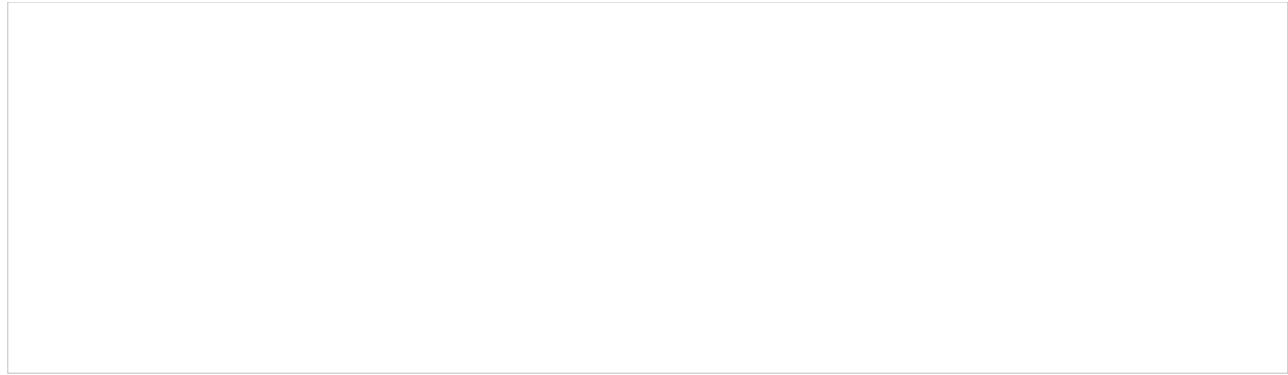
1. Set up your call centers

1. Go to Salesforce Lightning's *Setup* view. A new tab will open.



Select Setup view

2. Go to *Platform Tools > Feature Settings > Service > Call Center > Call Centers*. Note that it is possible to have multiple call centers in Salesforce. Existing call centers are listed on the Call Centers page.



Setup > Call Centers

2. Save call center definition file

Copy the following and paste it into a text document. Save it as XML.

```
<callCenter>

<section sortOrder="0" name="reqGeneralInfo" label="General information">
<item sortOrder="0" name="reqInternalName" label="Internal name">CSIMIntegration</item>
<item sortOrder="1" name="reqDisplayName" label="Display name">CSIM Integration</item>
<item sortOrder="2" name="reqAdapterUrl" label="Agent Desktop URL"></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="custTenantUrl" label="Tenant URL (if different from AD URL)">example.com</item>
<item sortOrder="7" name="muteRecordingUrls" label="Mute Recording Urls"></item>
<item sortOrder="8" name="reqSalesforceCompatibilityMode" label="Salesforce Compatibility
Mode">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">011</item>
</section>

</callCenter>
```

About This File

This call center definition file includes item *muteRecordingUrls*, which automatically mutes call recordings and pauses agents' screen recordings when those pages are visited. The *muteRecordingUrls* feature helps your contact center to be compliant when agents are receiving sensitive data (e.g., credit card numbers).

Also included is item *reqSalesforceCompatibilityMode*, provides compatibility with Salesforce Lightning; without this item, Bright Pattern integration will not work in Salesforce Lightning.

3. Import the file to your call center

1. Select the desired call center from the list (e.g., "BrightPattern Integration").

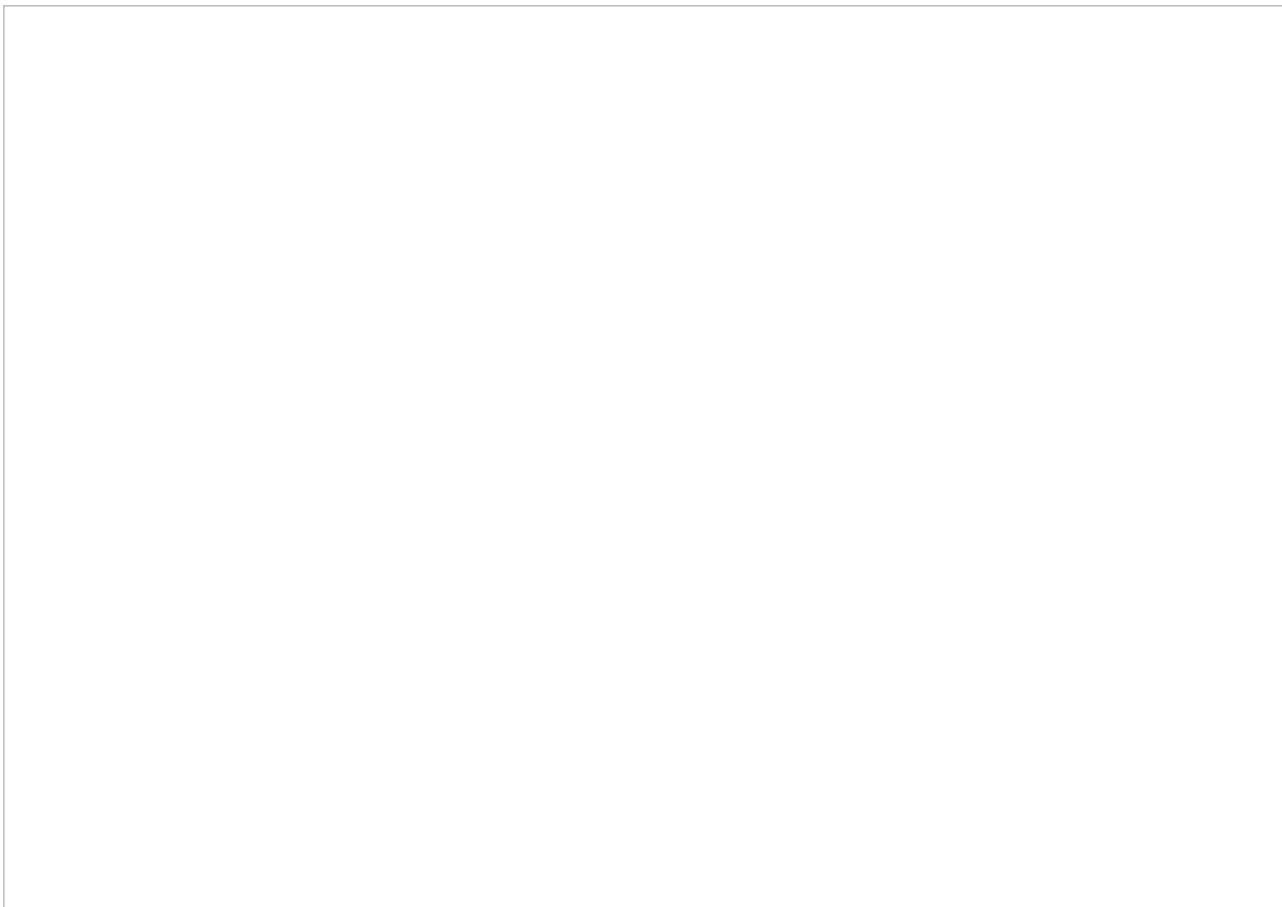
2. Click the **Import** button.
3. Click **Choose file** to select the definition file.
4. Click **Import** again.



Importing a call center definition

Note that if the import does not work, it could be because you already have a call center of the same type configured. To get the call center definition file imported properly, you may need to change the original internal name of your call center (e.g., "CSIMIntegration") to a different name. See *reqInternalName* in the [call center definition file](#) above.

After you've imported the definition file to your call center, you will see the Call Center Detail page.

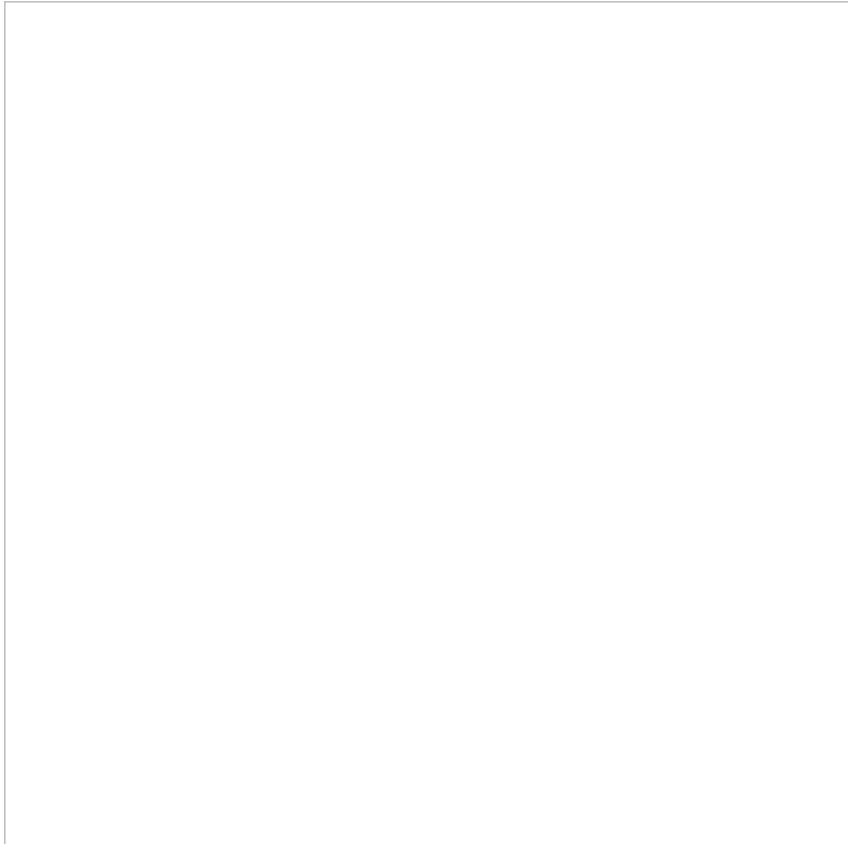


Call Center Detail

4. Edit call center properties

Now that you have defined your call center, you can set up the call center parameters that will enable integration with Bright Pattern Contact Center.

1. On the Call Center Detail page, click **Edit** at the top of the list. The Call Center Edit page opens.



Call Center Edit

2. The most important property to edit is the Agent Desktop URL. In the **Agent Desktop URL** field, change the URL to the following:

`https://<host>.brightpattern.com/agentdesktop/Lightning.jsp?enableSFOpenCTI=1&sflogin=1`

Make sure to replace `<host>` with your host name. For example, in Salesforce Lightning, your URL might be: <https://example.brightpattern.com/agentdesktop/Lightning.jsp?enableSFOpenCTI=1&sflogin=1>

3. In **Salesforce Compatibility Mode**, enter **Lightning**.
4. **Optional:** Adjust the size of the Agent Desktop call widget that appears on Salesforce on either the homepage (in Classic view) or on every page (in Lightning view). You adjust the size by replacing the default values of the **Softphone height** and **Softphone width** fields. The default size is 300 (W) x 500 (H). Note that if the size is too small, the Agent Desktop call widget will appear truncated.
5. Click **Save**.

5. (Optional) Update your Tenant URL if you have multiple call centers

If you have multiple tenants (i.e., call centers), you should update your Tenant URL information for the particular call center you are configuring. **If you only have one call center, skip this step.**

1. On the *Call Center Detail* page, modify the following Agent Desktop URL by replacing

<tenant-name>.<service-provider-domain-name>

with your Bright Pattern Contact Center tenant access URL (refer to the example below, noting that this URL changes based on the version of Salesforce that you are using):

**[https://<tenant-name>.<service-provider-domain-name>/agentdesktop?
enableSFOpenCTI=1&sflogin=1&apexClass=BrightPattern.CSIMIntegration](https://<tenant-name>.<service-provider-domain-name>/agentdesktop?enableSFOpenCTI=1&sflogin=1&apexClass=BrightPattern.CSIMIntegration)**

2. For example:

**[https://demo.brightpattern.com/agentdesktop?
enableSFOpenCTI=1&sflogin=1&apexClass=BrightPattern.CSIMIntegration](https://demo.brightpattern.com/agentdesktop?enableSFOpenCTI=1&sflogin=1&apexClass=BrightPattern.CSIMIntegration)**

3. Modify the Tenant URL by replacing *example.com* with your fully qualified tenant URL (e.g., *example.brightpattern.com*).
4. Click **Save**.

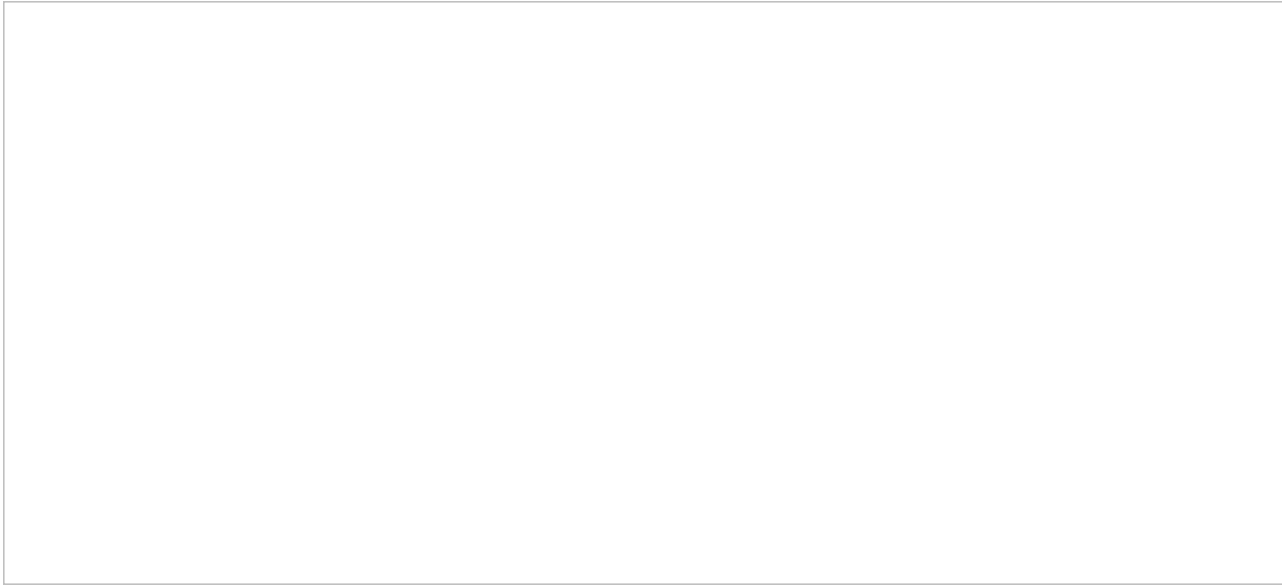
6. Check dialing options

In the *Dialing Options* section of call center parameters, you will see the fields **Outside Prefix**, **Long Distance Prefix**, and **International Prefix**. These fields were populated with values from the call center definition file. These values align with the phone number prefixes configured in your contact center's Dial-out entries. Prefixes are the numbers appended to phone numbers when they are dialed.

We recommend checking that the dialing options set in Salesforce match the dialing options set in Bright Pattern Contact Center.

1. In the Contact Center Administrator application, go to *Configuration > Directory > Dial-out Entries*.
2. Check that the prefixes set in dial-out entries match the following prefixes set in Salesforce:
 1. **Outside Prefix** - This number (e.g., "9") will be added by Salesforce to any phone number dialed using the "Click-To-Call" feature. If you do not such a dial-out entry configured, leave the "Outside Prefix" field empty in Salesforce.
 2. **Long Distance Prefix** - This number (e.g., "1" for US numbers) will be added by Salesforce to any long-distance phone number dialed using "Click-To-Call." If you do not such a dial-out entry configured, leave the "Long Distance Prefix" field empty in Salesforce.
 3. **International Prefix** - This number (e.g., "011") will be added by Salesforce to any international phone number dialed using "Click-To-Call." If you do not such a dial-out entry configured, leave the "International Prefix" field empty in Salesforce.

For more information on prefixes, see the *Contact Center Administrator Guide*, section [Dial-Out Entries](#).



Contact Center Administrator > Dial-Out Entries

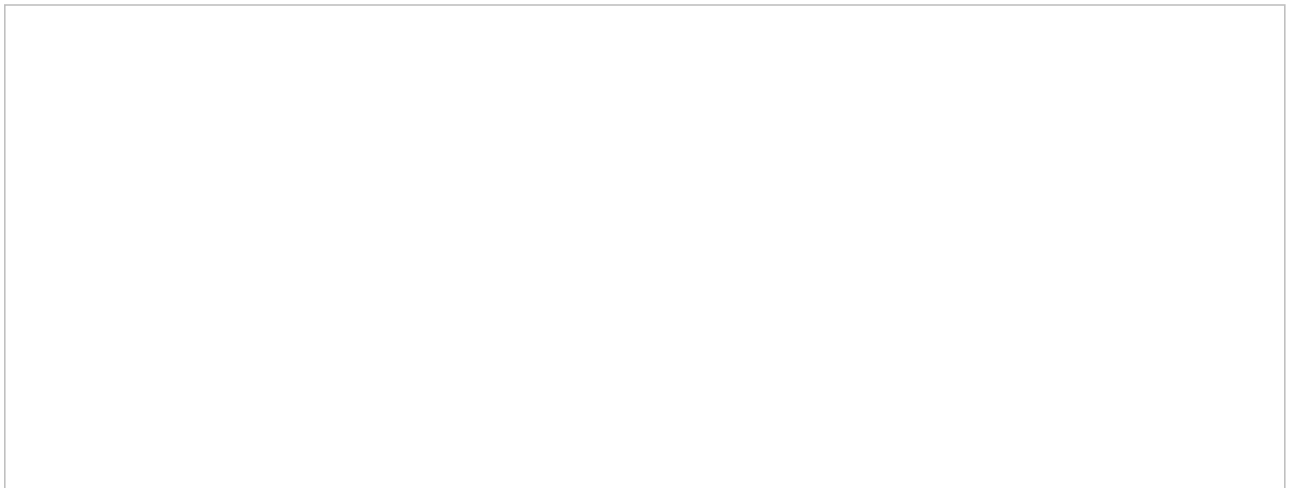
7. Assign Salesforce users to the call center

1. In the *Call Center Users* section, click **Manage Call Center Users**.



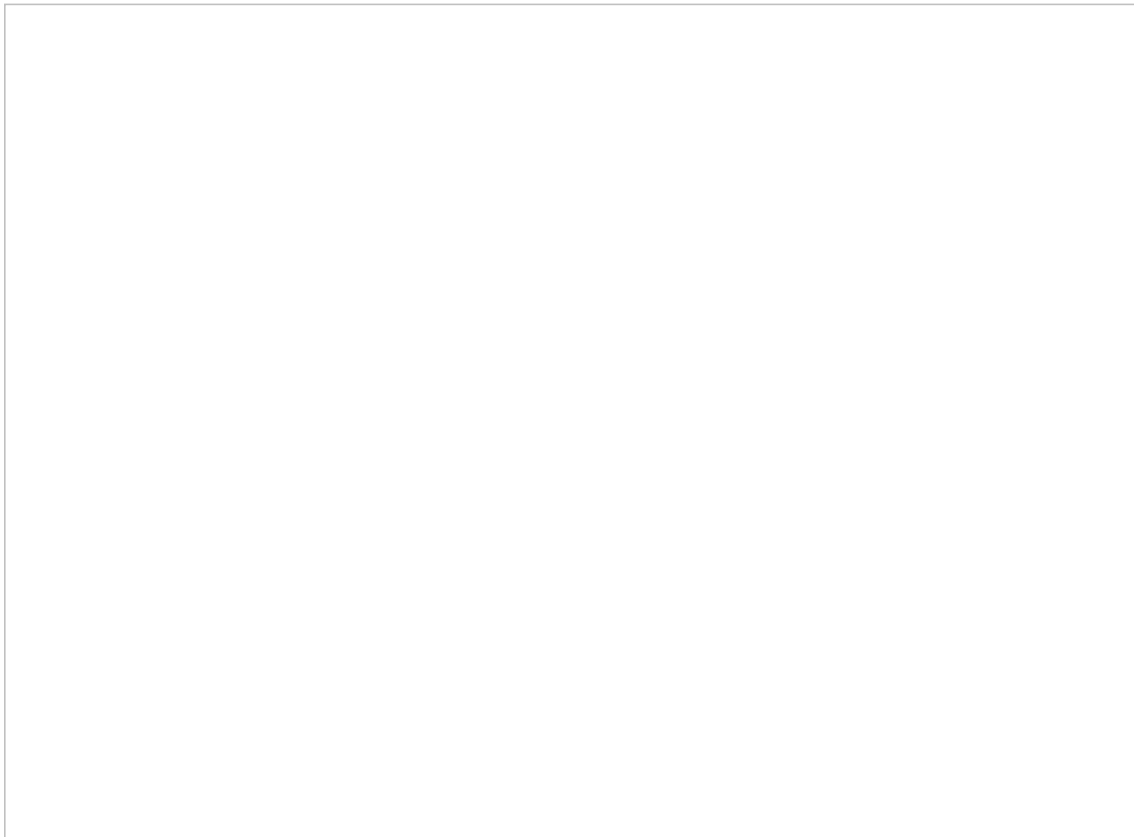
Manage Call Center Users

2. Select the name of the call center to which you want to assign users.
3. In the *Call Center Users* related list, click **Manage Call Center Users**.
4. On the *Manage Users* page, click **Add More Users**.



Add more users

5. Specify criteria to find the users who should be assigned to the call center.



Find users to assign to the call center

6. Click **Find**. Note that all users who already belong to a call center will be excluded from the search results because a user can be assigned to one call center at a time only.
7. Select the checkbox next to each user who should be assigned to the call center. At the bottom of the screen, click **Add to Call Center**.

Note: To reassign a user to another call center, first remove this user from the currently assigned call center and then add the user to the desired call center. You can view the currently assigned call center in the User Detail page.

Create a Lightning App

After configuring your call center, you will need to create a Lightning App. This app is where the CTI softphone is enabled, allowing the Agent Desktop widget to appear. The following instructions are valid for either Lightning or Service view.

Creating the App

Step 1: Add new Lightning app

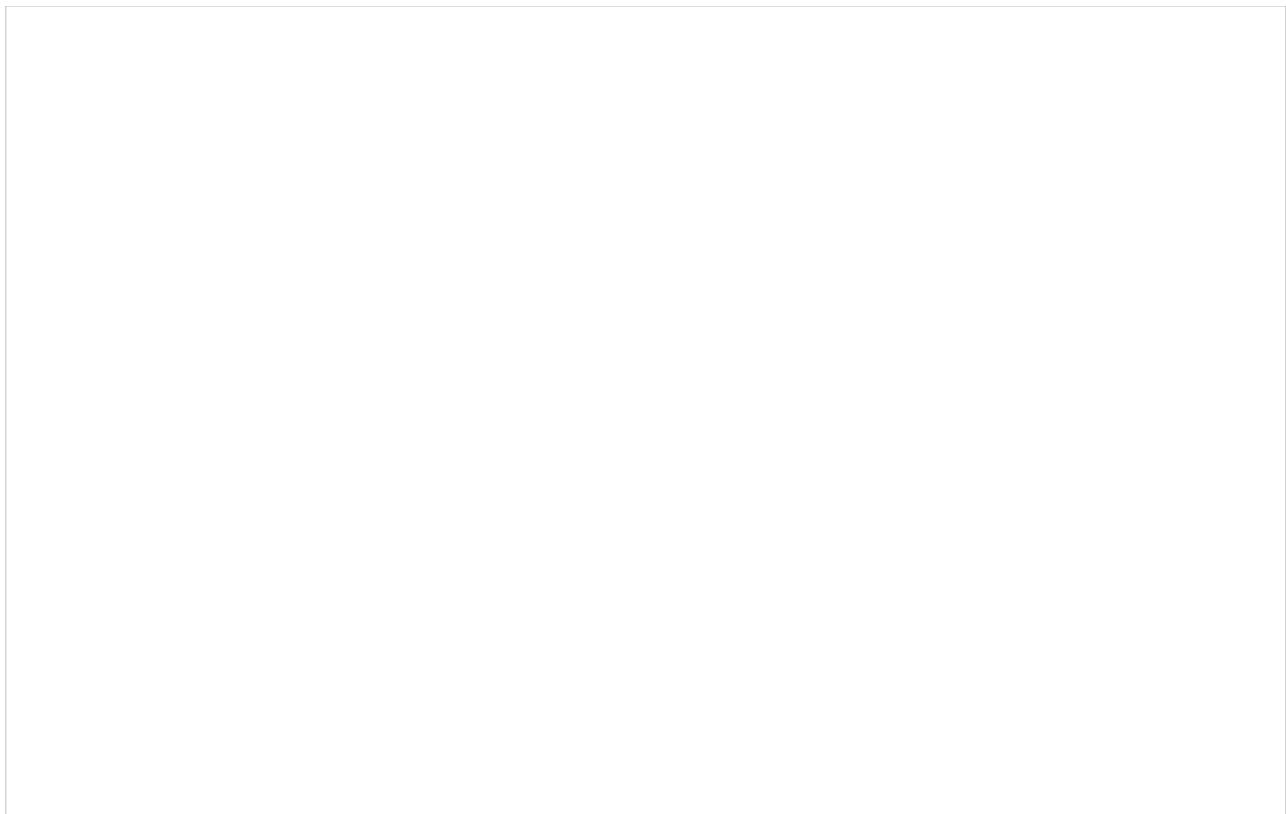
1. If your users will be working in Lightning and you want Agent Desktop to be embedded in Lightning, you'll need to start in Lightning view and then click **Setup**. Likewise, if your users will be working in Service and you want Agent Desktop to be embedded in the Service app, you'll need to start in the App Launcher, click **Service**, and then click **Setup**.
2. In *Setup*, use Quick Find to get to *App Manager*. Click **New Lightning App** and the *New Lightning App* configuration wizard will open.



App Manager

Step 2: Set app details

1. In the *App Details & Branding* screen, section *App Details*, fill out the **App Name** field; when finished, the App Name will auto-populate the *Developer Name* field.
2. Optional: Fill out the *Description* field.
3. When finished, click **Next**.



App Details & Branding

Step 3: Set app options

In this step, you will set standard navigation for the app. Note that you can choose either the full set of Setup options for Lightning view, or the Service Setup option for Service view. This is the only configuration step where the instructions differ for Lightning versus Service cloud.

1. In the *App Options* screen, set the following:
 1. **Navigation Style** - Select "Standard navigation"
 2. **Setup Experience** -
For Lightning view, select "Setup (full set of Setup options)"
For Service view, select "Service Setup"
 3. **App Personalization Settings** - Optional
2. When finished, click **Next**.



App Options

Step 4: Add CTI softphone

1. In the *Utility Items* screen, click **Add Utility Item**.
2. Search for and select *Open CTI Softphone*.
3. Ensure the checkbox *Start automatically* is enabled.
4. When finished, click **Next**.



Utility Items

Step 5: Add extras

1. In the *Navigation Items* screen, add any *Available Items* you wish to have appear in your app.
2. When finished, click **Next**.



Navigation Items


Step 6: Grant user access

1. In the *User Profiles* screen, add the user profiles you want to be able to access the app to *Selected Profiles*.
2. Click **Save & Finish**.



User Profiles

Launch the app

1. In order to verify your app is successfully working, click the **App Launcher**  icon, located in the upper left corner of the screen. In the App Launcher, select the new Lightning app or Service app you created, which will launch in a new tab.



App Launcher

2. In your launched Lightning or Service app, the Agent Desktop widget will be located along the bottom of the screen and may be accessed by clicking on the **Phone** icon.



The Agent Desktop widget in a Lightning app

Enable Scenarios to Access Salesforce Data

A connected app integrates an application like Bright Pattern Contact Center with Salesforce using APIs and lets Bright Pattern scenarios access and interact with Salesforce data objects using CRUD (i.e., Create, Retrieve, Update, Delete) functionality.

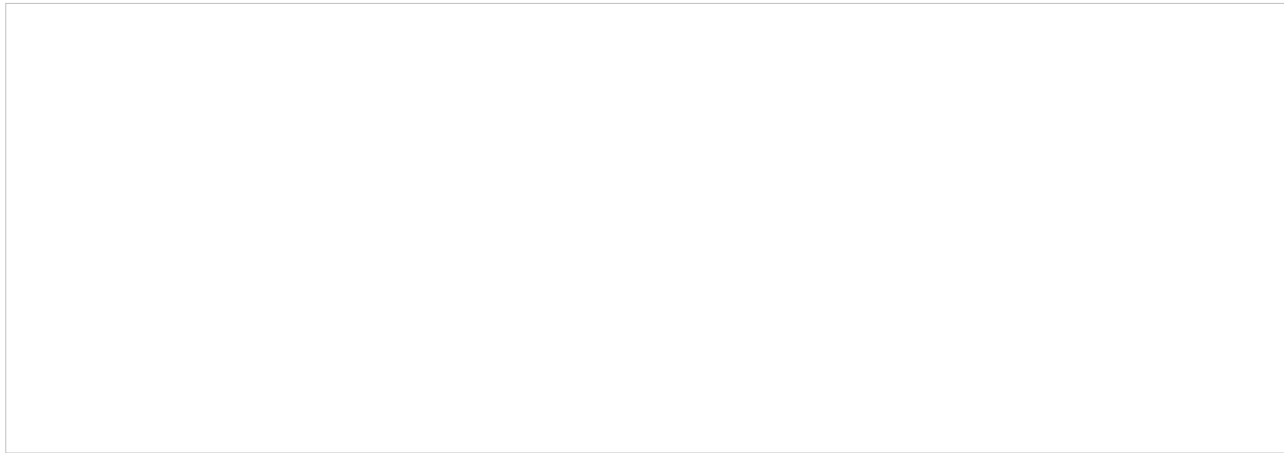
The server-side integration is implemented using Salesforce web services via the Salesforce REST API (http://wiki.developerforce.com/page/REST_API). Bright Pattern Contact Center authenticates with Salesforce using the [Web Server OAuth Authentication flow](#). The [refresh token](#) mechanism is used to obtain and refresh the access token.

This article will show you how to:

- Create a new connected app
- Enable API access
- Get the consumer key and consumer secret needed for your integration account properties
- Determine which user roles can access the connected app

Step 1: Create a new connected app

1. In Salesforce Lightning, go to *Platform Tools > Apps > App Manager*.
2. At the top of the Lightning Experience App Manager, click **New Connected App**.



Create new app

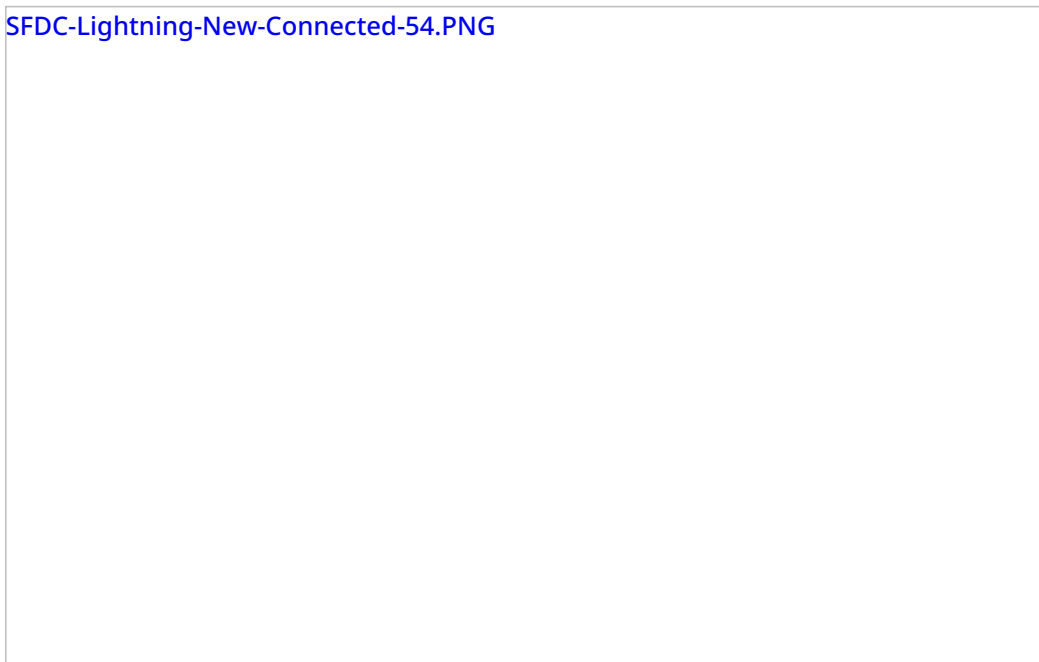
Step 2: Configure the connected app

To configure the connected app, enter the following details on the *New Connected App* page.

Basic information

- **Connected App Name** - Set any unused name as a Web App Name
- **API Name** - Set any unused name as an API Name
- **Contact Email** - Supply contact email

[SFDC-Lightning-New-Connected-54.PNG](#)



API (Enable OAuth Settings)

- **Enable OAuth Settings** - Select checkbox
- **Callback URL** - Set <https://<your-brightpattern-domain>/admin/salesforcecallback.html> (e.g., "<https://example.brightpattern.com/admin/salesforcecallback.html>")
- **Available OAuth Scopes** - Select the following:
 - Access and manage your data (api)
 - Full access (full)
 - Perform requests on your behalf at any time (refresh_token, offline_access)

[Lightning-Selected-OAuthb-54.png](#)



Important: Click "Save" when you are done!

Updates to these parameters take a few minutes to propagate through the system--wait 10 minutes while Salesforce updates these settings internally.

Step 3: Get the consumer key and consumer secret

1. In *App Setup > Apps > Connected Apps*, select and view details of the connected app you just created.
2. Copy the **Consumer key** and **Consumer secret** directly from the connected app.

[SFDC-API-OAuthb-54.png](#)



3. Save these for later use, when you paste them into your [integration account properties](#).

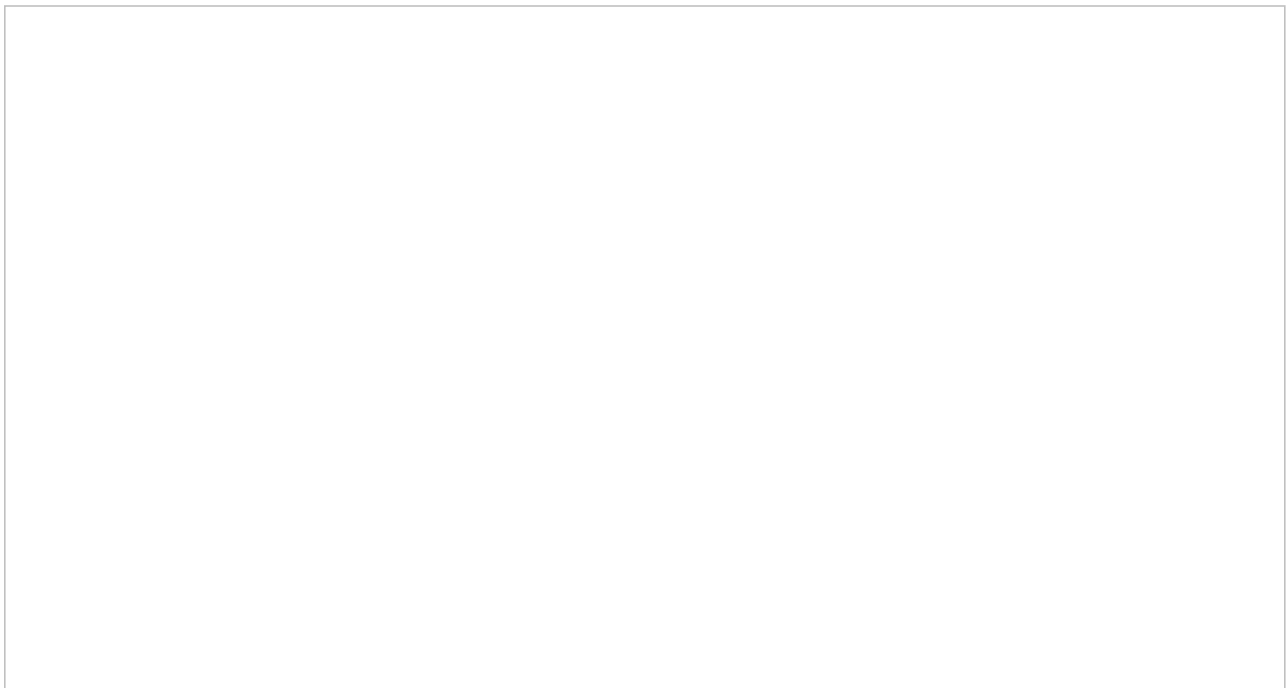
Step 4: Update the security profile to include the new connected app

1. In Salesforce Lightning Setup, from *Administration > Users*, edit the **System Administrator** security profile.



Click "Edit" for the System Administrator security profile

2. In the *Connected App Access* section, select the checkbox for the connected app created earlier (e.g., "LemurBooksApp" in this example). This grants users with the system administrator role access to your connected app.



Connected App Access

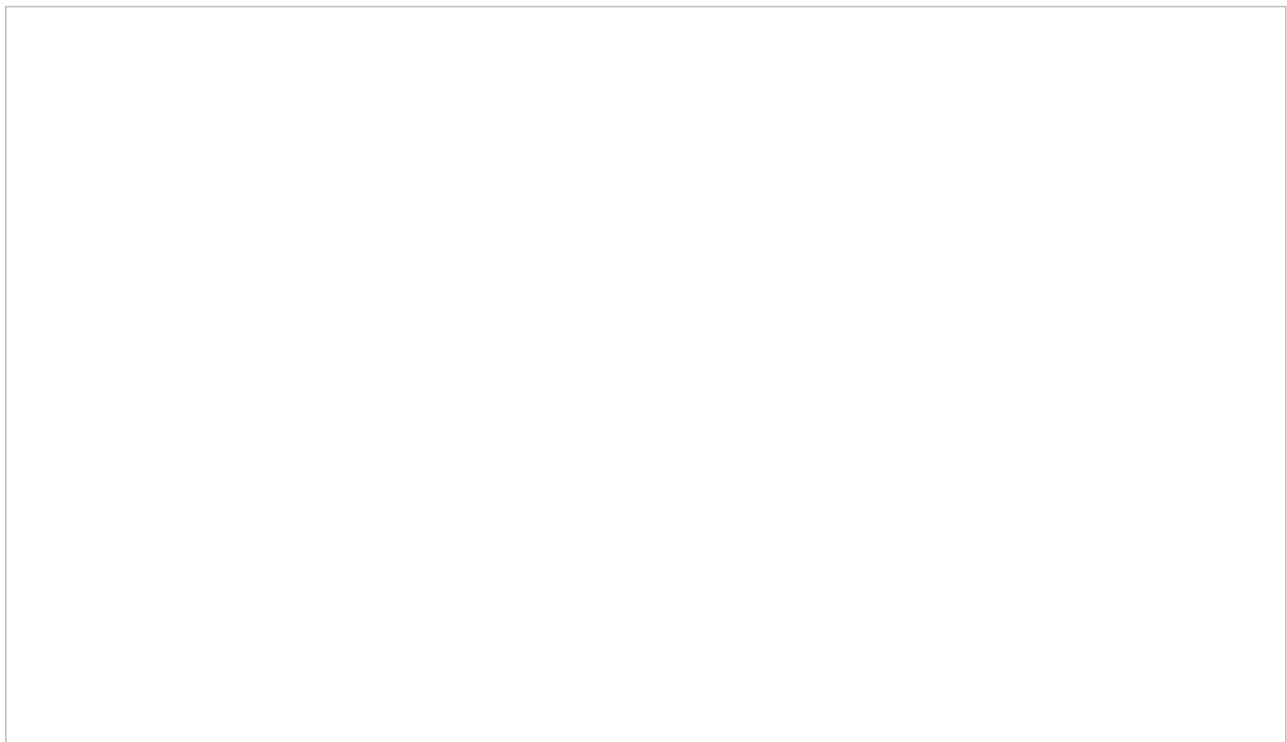
3. Click **Save**.
4. You should do the same for any user profile type (e.g., "Standard User") that will need access to your connected apps. If you are not sure which user profiles to edit, go to your connected app's Profiles section to see which profile types they have been assigned.

Enable Single Sign-On in Salesforce Lightning

Single Sign-on (SSO) functionality allows call center users to log in to Salesforce and Bright Pattern Contact Center applications simultaneously from a single login.

Step 1: Register and deploy organizational domain to users

1. In Salesforce Lightning Setup, go to *Settings > Company Settings > My Domain* to register a new organizational domain (if you don't already have one).
2. Click **Configure a Domain Name**.
3. Enter your desired domain name, such as your company name, and check for availability. When the name is shown to be available, you may register it. The registration process will take a few minutes; you will receive an email when your domain is registered and ready for testing. For more information on registration, refer to [Salesforce Help](#).



Register your domain

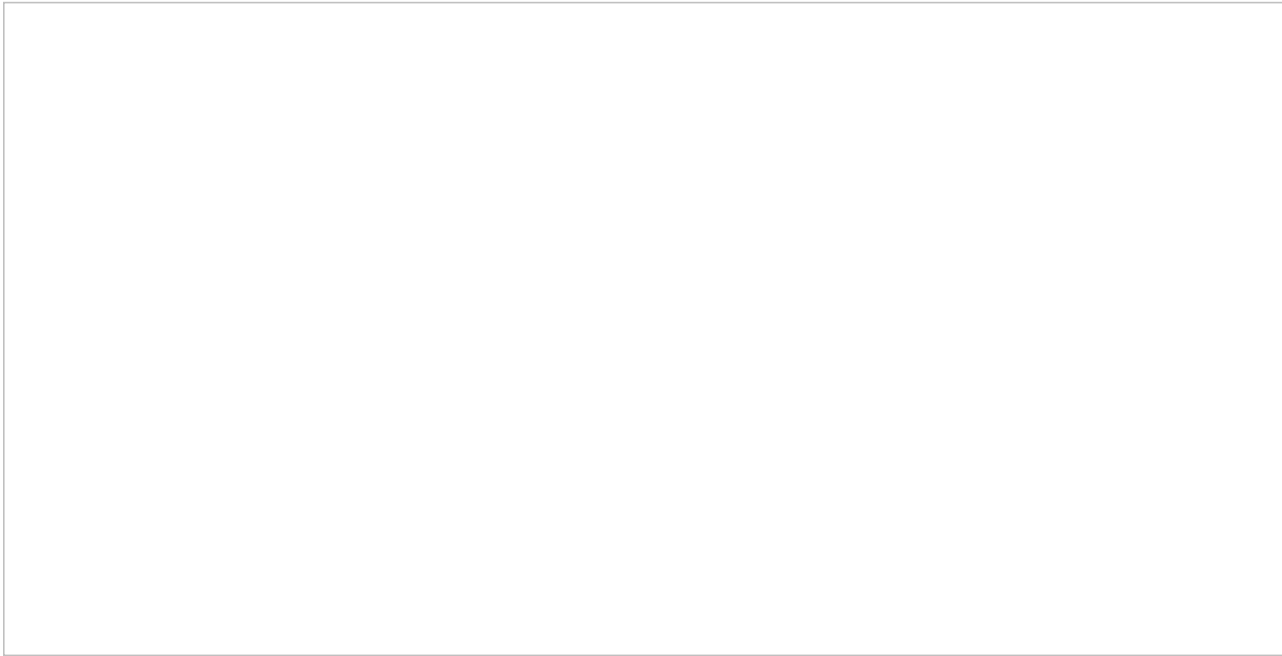
4. Log in to the domain to test it, and then click **Deploy to users**.
5. All users must log in using this domain URL, which should be in the following format:

`https://<your-domain-name>.my.salesforce.com/`

Step 2: Enable identity provider

After your domain name is registered, you will be able to enable your identity provider, which is necessary for SSO. Once you complete this step, you will not have to do it again.

Use Quick Find to go to the *Identity Provider* page and click on **Enable Identity Provider**.

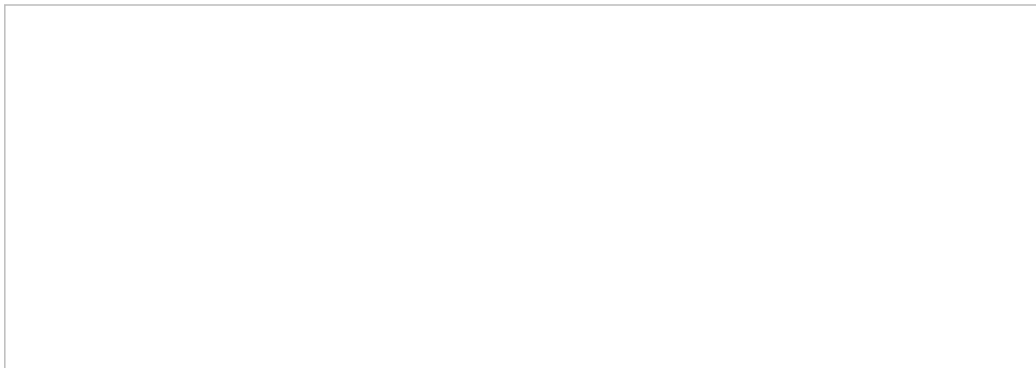


Click to enable the identity provider

Step 3: Get the certificate

The certificate is used in the [Add Salesforce Integration Account](#) section of this guide to establish Salesforce as the identity provider for single sign-on.

1. In *Identity Provider Setup*, select the actual certificate to be used. If no certificates are shown, you should either create a new self-signed certificate or import a certificate from your setup.



Select the certificate

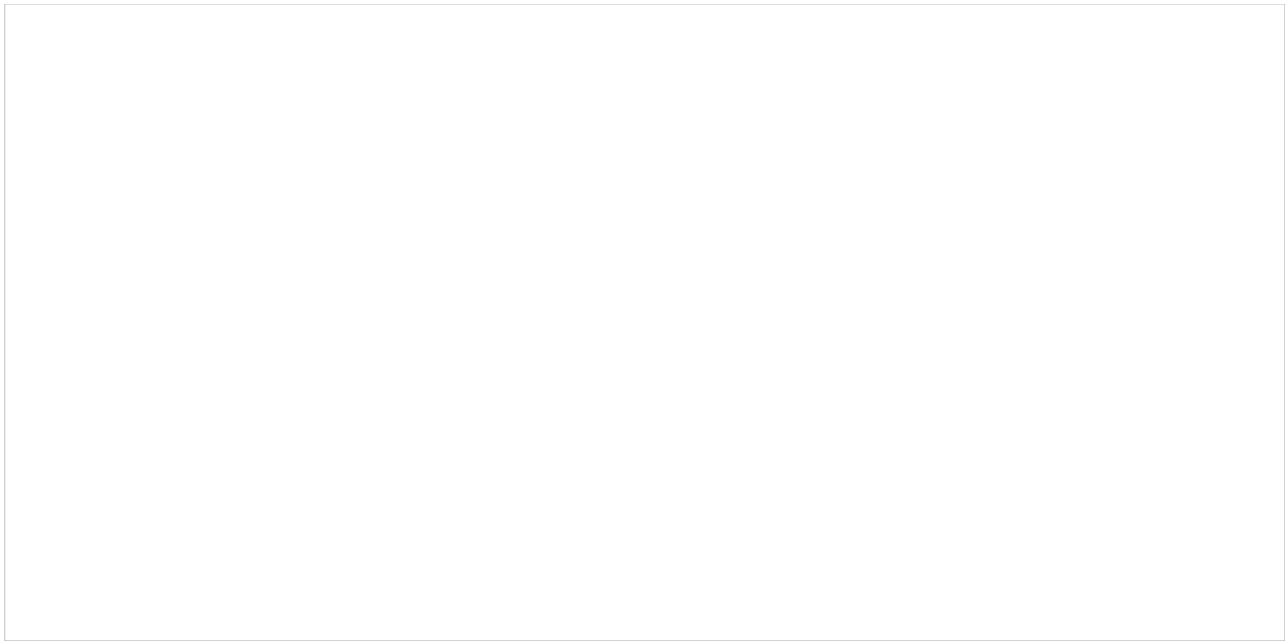
2. Use the **download certificate** button if the certificate was previously downloaded.



You may need to click "Download Certificate"

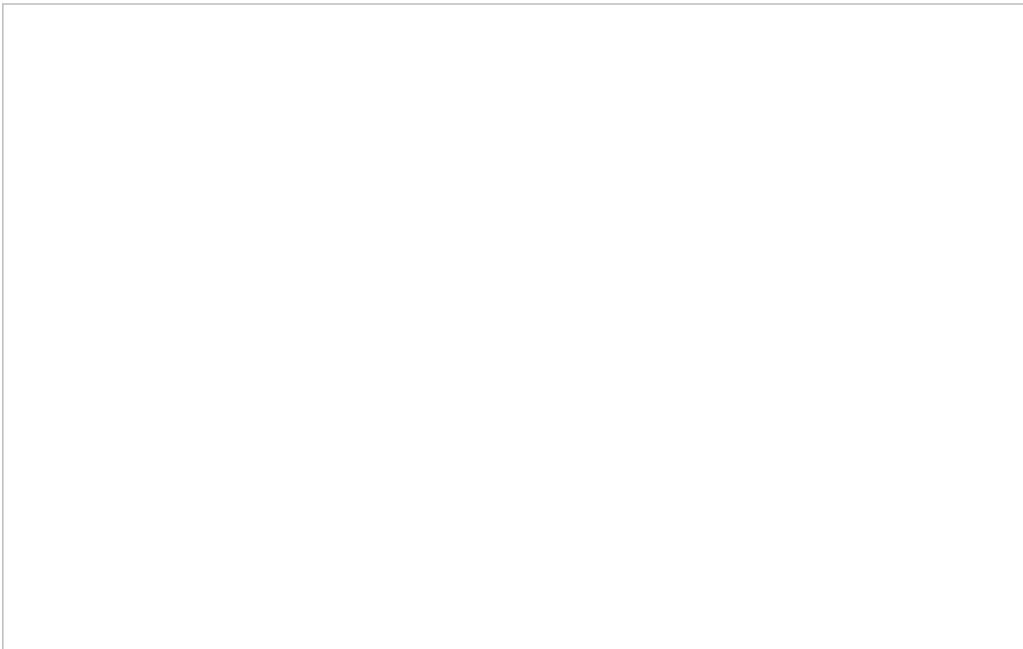
Step 4: Customize your connected app

1. Go to your Connected App Detail page and select **BrightPattern** from the list of connected apps.



Connected Apps

2. On the *Connected App Detail* page that opens, click **Edit Policies** (at the top).
3. Set the following app settings:
 1. **IP Relaxation** - Relax IP restrictions
 2. **Refresh Token Policy** - Refresh token is valid until revoked
 3. **ACS URL** - The URL should take the following form, where "<your-tenant>" is your contact center name:
<https://<your-tenant>.brightpattern.com/agentdesktop/agentdesktop/sfssso/response>



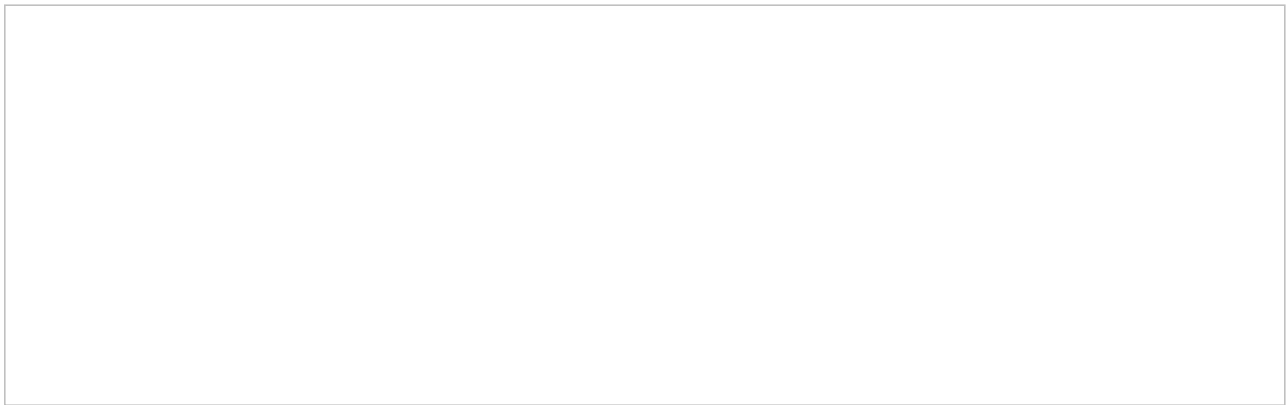
Settings to edit

4. Click **Save**.

Step 5: Configure user profiles and field mapping (login mapping – custom attribute)

SSO requires user profiles assigned for users that are going to utilize Bright Pattern Contact Center to be authenticated by the Salesforce Identity Provider. The following process maps the SSO parameters to the Bright Pattern Contact Center login ID.

1. Go back to *Administer > Manage Apps > Connected Apps*, and select **BrightPattern** to get to the Connected App Detail page.
2. Scroll all the way down to *Custom Attributes* and click **Edit**.



Edit custom attributes

3. In the *Update Custom Attribute* page that opens, set the following:
 1. **Attribute key - CSIMLoginID**
 2. **Attribute value - \$User.CommunityNickname**

[Sfdc-integration-guide-image9.png](#)



Bright Pattern Contact Center uses one optional custom service provider "Attribute key": *CSIMLoginID*. This Attribute could be matched with any user's field. By default, it is configured to match the Salesforce user nickname (*\$User.CommunityNickname*).

Note: If this attribute mapping is removed and no other attribute is specified, then the login ID will be used with or without the domain suffix based on the *Strip domain suffix from login names*: option.

Step 6: Get the identity provider initiated login URL

1. Still on the **BrightPattern** Connected App Detail page, see section *SAML Login Information*.
2. Copy the full URL from the **Idp-initiated Login URL**.



SFDC-SAML-Login-50.PNG

3. Save this URL for when you add the Salesforce integration account in the Bright Pattern Contact Center Administrator application. This URL will go in the "Identity provider initiated login URL" property.

Step 7: Set up SSO integration with Bright Pattern Contact Center

SSO integration configuration is completed when you paste the certificate and Idp-initiated Login URL into [Salesforce integration account properties](#) in Bright Pattern's Contact Center Administrator application.

Add Salesforce Integration Account in Bright Pattern

Now that your call center and connected app are configured in Salesforce, you can create the integration account that establishes the connection between Salesforce and Bright Pattern Contact Center. New integration accounts are added in the Contact Center Administrator application. For more information, see the *Contact Center Administrator Guide* section [Integration Accounts](#).

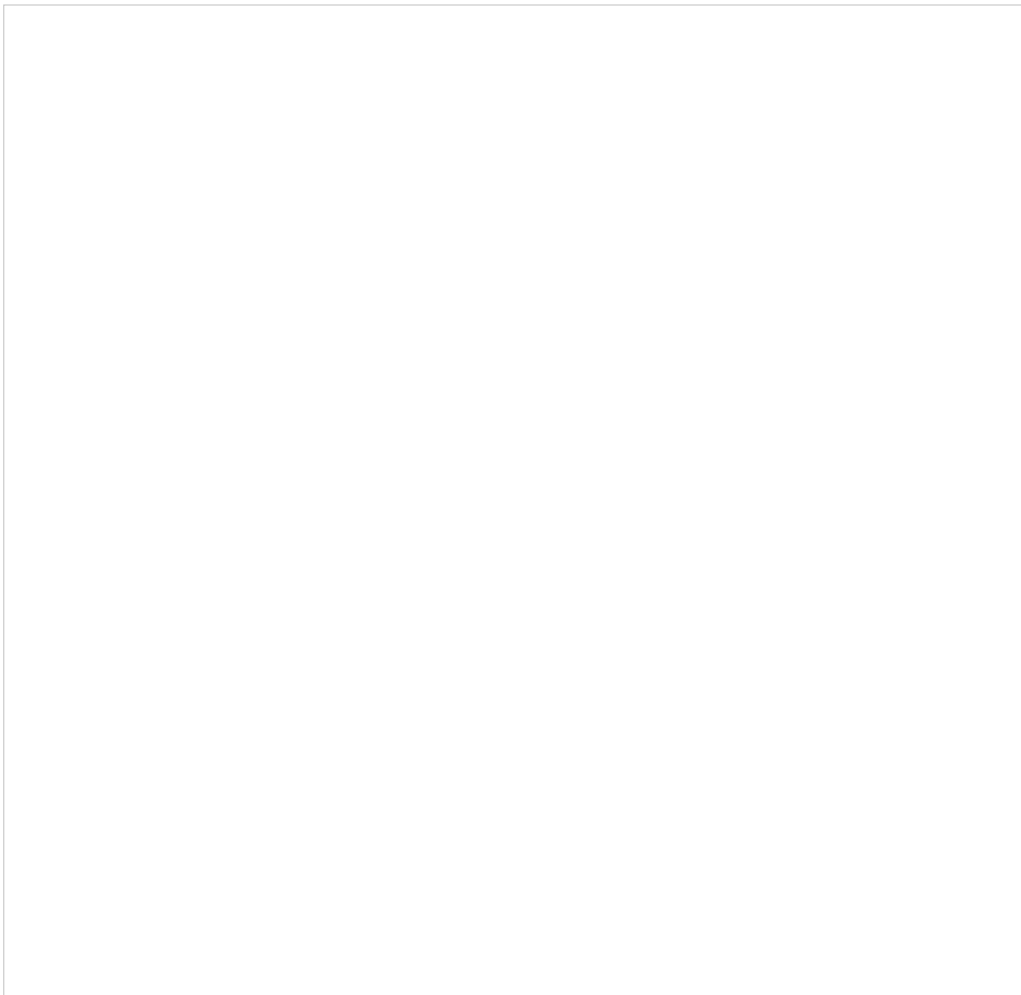
1. Create new integration account

In Contact Center Administrator application, go to *Configuration > Call Center Configuration > Integration Accounts* and click + to add a new account of type **Salesforce.com**.



Select "Salesforce.com" as the integration account type

2. Edit properties



Salesforce.com integration account properties

Basic Properties

- **Type** - By default, "Salesforce.com" because you selected this type of integration account to add
- **Name** - The name of the account (any name)
- **Default account** - Select this checkbox if you have multiple Salesforce integration accounts and you want this account to be used by default.
- **Url** - The URL of your registered domain on Salesforce where your users will sign in to your instance. The URL should be in the following format: **https://<your-domain-name>.my.salesforce.com/**

Data Access from Scenarios Properties

In the **Data Access from Scenarios** section, set:

- **Sandbox environment** - Select checkbox if your Salesforce environment is a [sandbox](#)
- **Consumer key** - The consumer key of the Connected App you previously configured in Salesforce. You can find your Connected App's consumer key in Salesforce Lightning Setup in *Security > Certificate and Key Management*.
- **Consumer secret** - The consumer secret of the Connected App you previously configured in Salesforce. You can find your Connected App's consumer secret in Salesforce Lightning Setup in *Security > Certificate and Key Management*.
- **Refresh token** - Click **Request token** to allow access to your Salesforce Connected App
- **Check limits** - You can use the **Check limits** button to see the [SFDC limits](#) associated with this account.

Single Sign-on Properties

In this section, you will enable single sign-on (SSO) functionality for Salesforce integration. SSO provides simultaneous login to Bright Pattern Contact Center applications and the embedded Agent Desktop widget on Salesforce. For example, users who log in to the Agent Desktop widget on Salesforce will find themselves also logged in to Bright Pattern applications (e.g., Agent Desktop, Contact Center Administrator, etc.).

Identity provider certificate

Provide the Salesforce Identity Provider Certificate (see instructions below). If you do not plan on configuring SSO, leave the certificate empty.

How to Add the Certificate

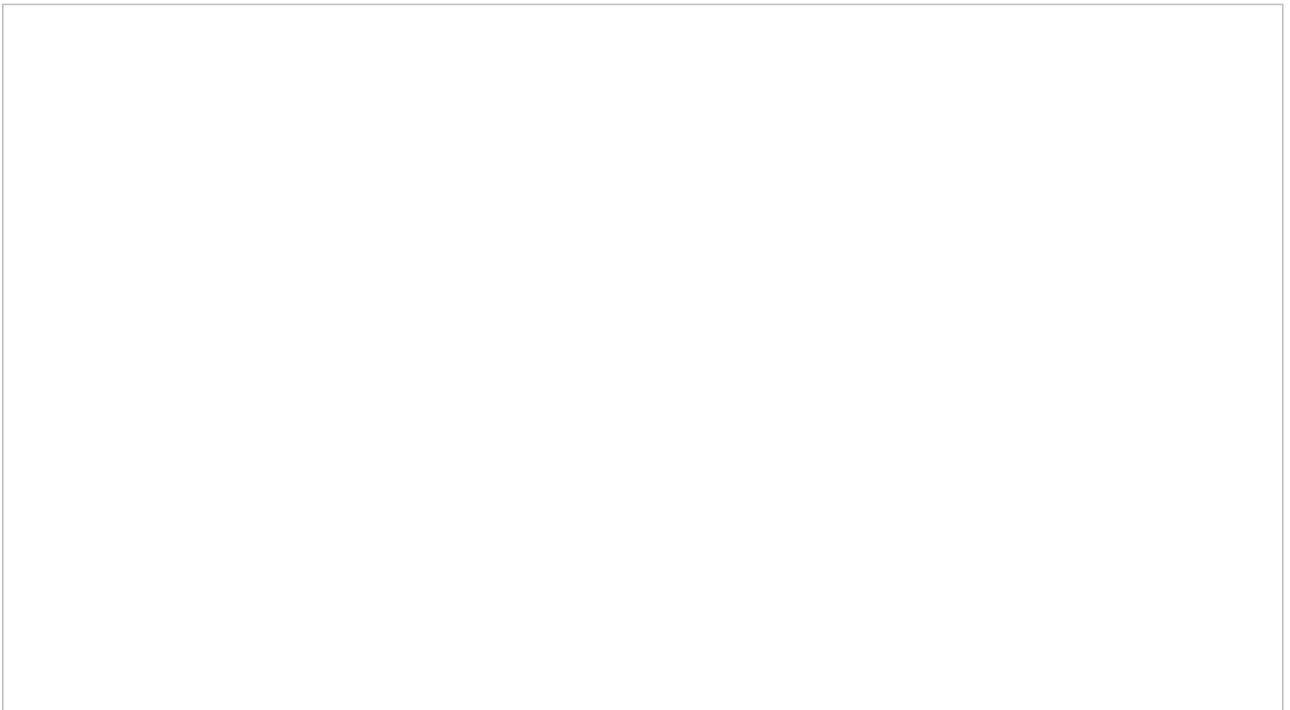
Before you can add the certificate, you have to ensure that there is one. In case you have multiple certificates, you must choose the certificate you want to use as the Identity Provider Certificate on the *App Settings* page.

1. In Salesforce Lightning Setup, go to *Security > Certificate and Key Management*



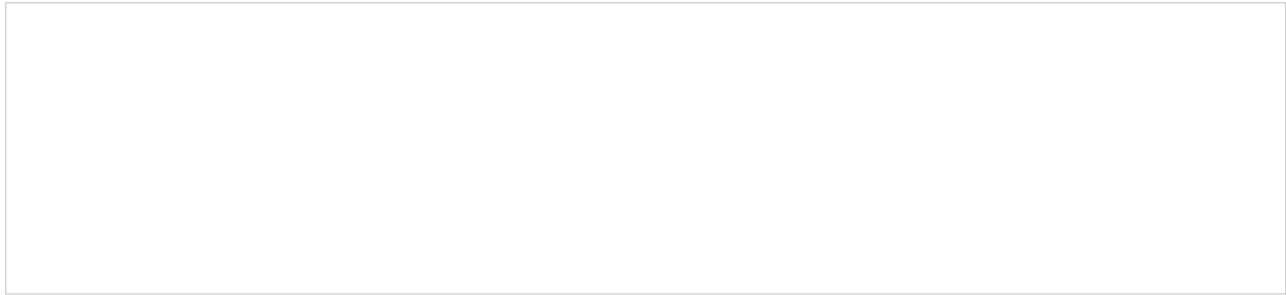
Certificate and Key Management

2. If there are no certificates listed, or your certificate is expired, either create a new one or import a certificate from your setup.
 1. To import, click the **Import from Keystore** button. Any certificates you import will be shown in the *Idp Certificate* field on the *Connected App Detail* page. Note that if you have multiple certificates, you must choose the certificate you want to use as the Idp Certificate on the *Connected App Detail* page.



IDP certificate shown on User Interface > App Manager > Connected App Detail

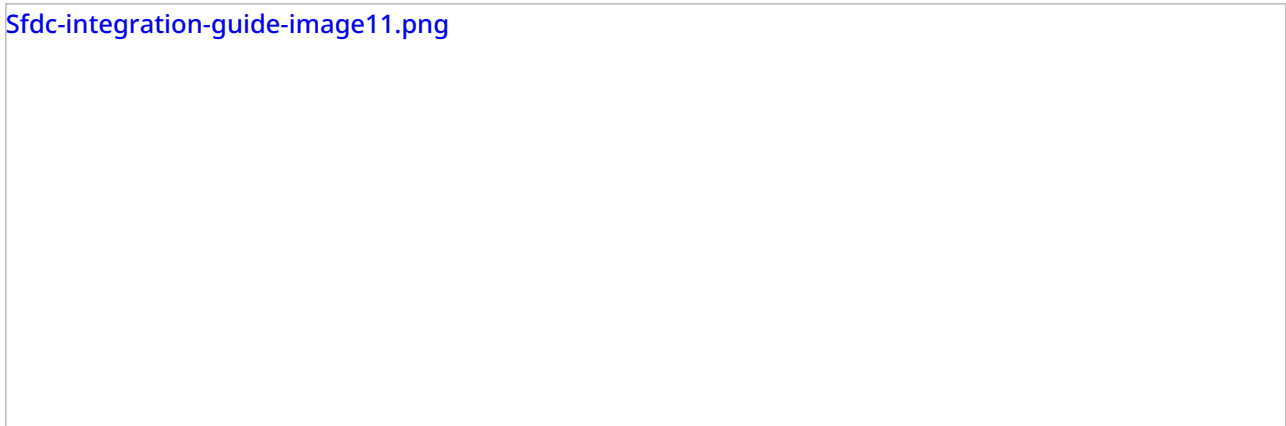
2. Select the certificate desired (or import a certificate). Note that you may have multiple certificates shown.
3. Click **Download Certificate**.



Download the certificate from Salesforce

4. Open the file in and copy the certificate content only (i.e., the text between -----BEGIN CERTIFICATE----- and -----END CERTIFICATE-----).

[Sfdc-integration-guide-image11.png](#)



5. Go back to the Contact Center Administrator application and **paste** the certificate into the Salesforce integration account properties.
6. In the *Set Identity Provider certificate* dialog, click **Set**. This pastes in the certificate.

Identity provider initiated login URL

This is the "Idp-initiated Login URL" as copied from your Salesforce Connected App Detail page.

To find this URL:

1. Go to *Salesforce Lightning Setup > Platform Tools > Apps > Connected Apps > Manage Connected Apps*
2. Click *Connected Apps* and select the "BrightPattern" App created earlier.
3. Under section *SAML Login Information*, copy the full URL from the **Idp-initiated Login URL**.

SFDC-SAML-Login-50.PNG

Note: Even if you do not configure SSO, you still need to set something in this required field. If you do not plan on configuring SSO, enter any character or string (e.g., "https://" or "/") to invalidate the URL.

3. Save

Click **Apply** to save your changes. Salesforce integration account configuration is now be complete.

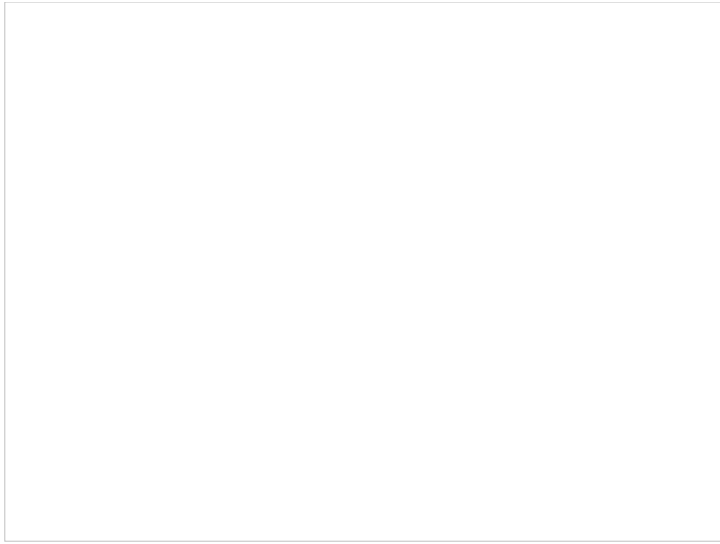
Next, you can view our [tutorials](#) to learn how to set up scenarios to use Salesforce data.

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 Lightning *Setup*, search for **Call Centers** and select **Softphone Layouts**.



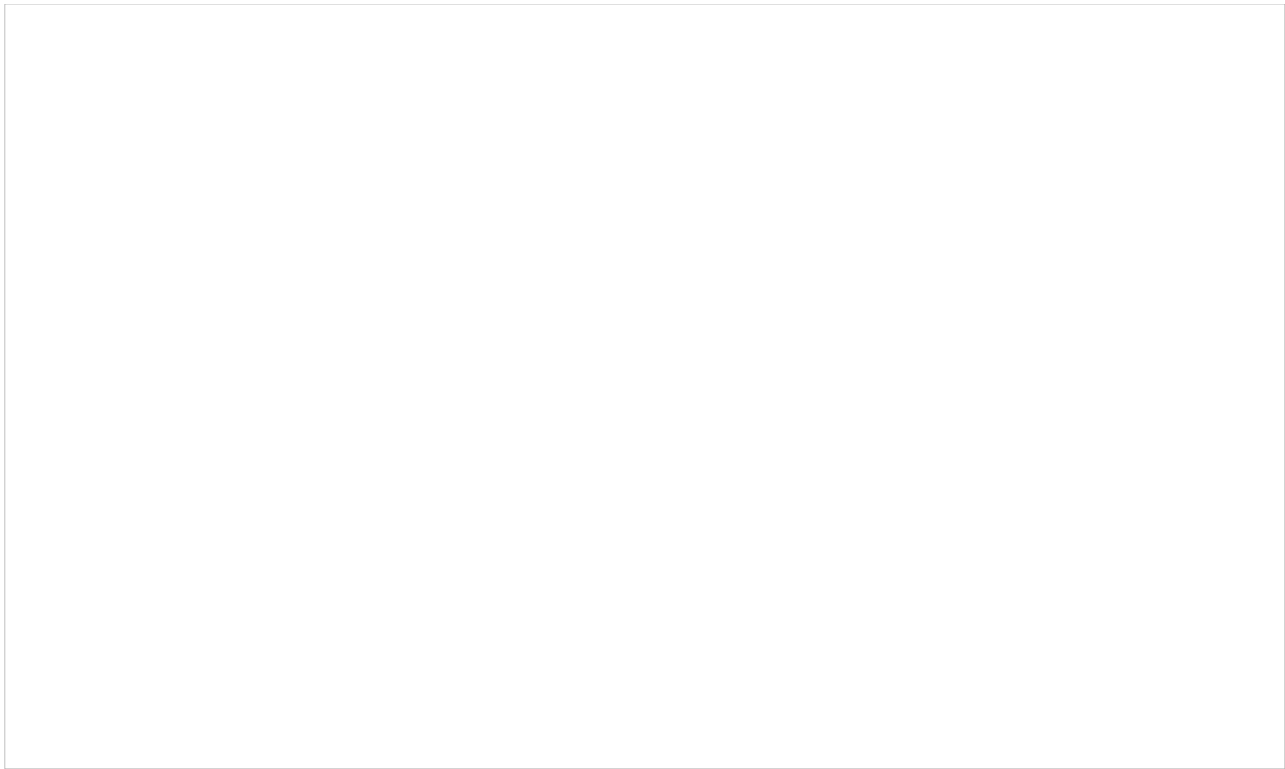
Lightning > Setup > Call Centers > Softphone Layouts

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



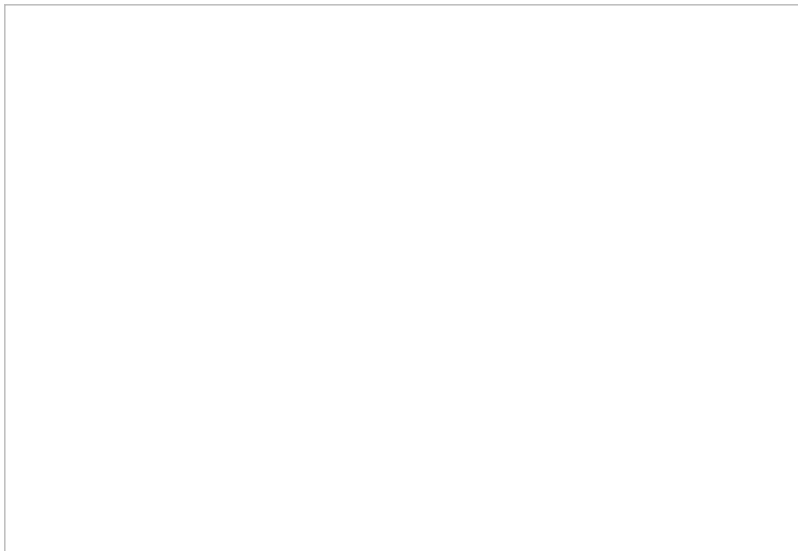
Click "Edit" beside the selected softphone layout

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



Screen Pop Settings

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



Pop to search page

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

Screen pop functionality is now enabled in your Salesforce account.

