



# GETTING STARTED WITH YOUR SOFTPHONE

## Summary

The Salesforce CRM Call Center SoftPhone improves your productivity by providing fast and easy access to accounts, contacts, cases, and other Salesforce objects that are directly related to incoming calls.


### Tips

The **One Step Transfer** and **One Step Conference** buttons may be available in your SoftPhone if your call center supports this functionality. Use these buttons if you want to transfer or conference a call without first speaking privately to the third party.

To view a list of all calls that you've made or received in the past day, click **My Calls Today**. This link opens the My Calls Today report in the Reports tab.

## Logging In to Your SoftPhone

Salesforce CRM Call Center requires you to first log in to Salesforce and then to log in separately to your SoftPhone. The SoftPhone is located in the sidebar and only appears if you are:



- Assigned to a call center in Salesforce
- Using a machine on which an appropriate CTI adapter is installed. You can quickly verify that an adapter is installed by looking for the  icon in the system tray of your computer.

Depending on the phone system that your organization uses, the SoftPhone login prompts you to enter your user ID, password, and other credentials. Once you have entered these values, click **Log In** to complete the connection to your phone system.

After logging in, your call center state is automatically set to `Not Ready for Calls`. If you want to receive calls, use the drop-down list at the top of the SoftPhone to change your call center state to `Ready for Calls`.

## Using the SoftPhone

You can use the SoftPhone to perform the following functions:

- Dial a phone number by entering the number into the built-in SoftPhone and clicking **Dial**, or by clicking the  icon next to any phone number associated with a contact, lead, activity, or account.
- Look up a phone number in your call center directory by clicking the  icon, typing all or part of the name for which you are searching, and clicking **Go**. Click the name of a number to enter it into your SoftPhone's dial pad.
- Answer a phone call by clicking **Answer** when a call arrives or using your physical telephone set to pick up the call.
- Put a caller on hold by clicking the **Hold** button while on a call. You can retrieve the call by clicking **Retrieve from Hold**.
- Initiate a conference call by clicking the **Conference** button while on a call. Your original call is placed on hold while you connect to the new participant. Once you have connected, click **Complete Conference** to place all parties on the same line.
- Transfer a phone call by clicking the **Transfer** button while on a call. Your original call is placed on hold while you connect to the third party. Once connected, click **Complete Transfer** to transfer the original party.
- Start a new call on a second line by clicking **New Line** while on a call.
- Attach comments to an automatic call log by typing text into the `Comments` text box during a call.
- Associate Salesforce records with a call by navigating to the record in the main Salesforce window and then selecting it in the call log area.
- Edit completed call logs by clicking **Edit** next to the call in the Recent Calls area of the SoftPhone.

## Specifying Personal SoftPhone Settings

### Additional Features

Your SoftPhone may include additional features that are not described in the Salesforce help because of customizations that have been made for your organization or the CTI Toolkit with which your SoftPhone was built. See your administrator for details.

To edit personal SoftPhone settings from your personal settings, enter *SoftPhone* in the *Quick Find* box, then select **My SoftPhone Settings**. The following options are available.

- **Automatically log in to your call center when logging into Salesforce**—Select this option if you want Salesforce to use saved login information to automatically log you in to your SoftPhone.
- **If only one record found on incoming call**
  - Select *Always open the record automatically* to display a single matching record in the main Salesforce window when a call arrives.
  - Select *Never open the record automatically* to display a single matching record only as a link in the SoftPhone. You must click the link to display the full record details.