

Integrating Salesforce with Barracuda Phone System

<https://campus.barracuda.com/doc/46202938/>

This article describes how to:

- Configure Salesforce to connect calls on your Barracuda Phone System directly from the browser.
- Configure Barracuda Phone System to show caller information from Salesforce when agents use the Communication Command Center.

Configure Web Click-to-Dial on Your Barracuda Phone System

1. Log in to a Barracuda Phone System Administrator account.
2. On the **Configuration** tab, select **Web Click-to-Dial**.
3. Click **Add a URL Preset**, and add the following preset:
 - Redirect Key: **salesforce**
 - URL Template: **https://<your SF domain>/00T/e?title=Call&followup=1&tsk5=Cal&who_id={who_id}&retURL=/{who_id}**

Replace <your SF domain> with the domain you usually use to access Salesforce. For example, *na15.salesforce.com*

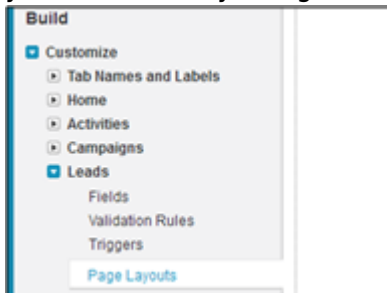


Install the Barracuda Phone System Plugin into Salesforce

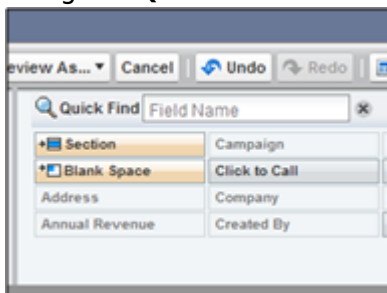
1. Log in to a Salesforce administrative account.
2. Navigate to <https://login.salesforce.com/package/installPackage.apexp?p0=04ti00000004PBw> to install the plugin.
3. Click **Continue** to begin installation.
4. Click **Next** to approve plugin access.
5. Select **Grant Access to All Users** to allow your Salesforce users to access the plugin, then click **Next**.
6. Click **Install** to install the plugin.

Add the Click-to-Call Feature to Page Layouts

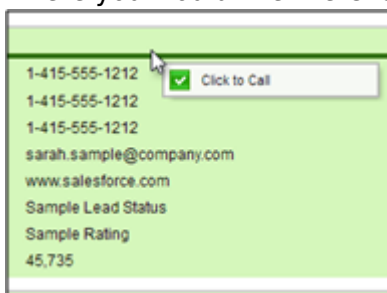
1. If you are not already logged in to your Salesforce administrative account, log in now.
2. On the navigation menu on the left, locate the **Build** section, then click **Customize, Leads**, and **Page Layouts**.
3. Click **Edit** to edit a layout. You will likely want to edit the **Lead Layout** and any other layouts you are currently using.



4. In the field list at the top of the page, find the **Click to Call** field. You may need to search for it using the **Quick Find** feature.



5. Drag the **Click to Call** field to the **Lead Sample** layout at the bottom of the page, in the place where you would like the Click to Call feature to appear.



6. At the top of the field list, click **Save**.
7. Repeat these steps for the **Page Layouts** section of both **Accounts** and **Contacts**.

Configure the Click-to-Call Feature for Users

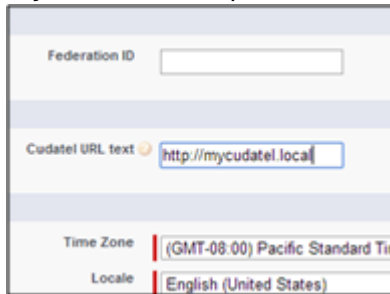
1. If you are not already logged in to your Salesforce administrative account, log in now.
2. On the navigation menu on the left, locate the **Build** section, then click **Customize, Users**, and **Page Layouts**.
3. Click **Edit** to edit a layout.
4. Drag the **Barracuda Phone System URL text** field down to the **Additional Information** section.
5. At the top of the field list, click **Save**.
6. On the navigation menu on the left, locate the **Administer** section, open **Manage Users**, and

click the **Users** item.

7. Click **Edit** to edit a user.

8. In the **Additional Information** section of the form, enter the URL of your Barracuda Phone System.

If you have multiple servers, enter the URL of the relevant server to this user.



- Be sure to include the **http://** or **https://** protocol portion of the URL.
- The URL should be reachable from the user's client computer. It may be an internal or intranet URL if the user accesses Salesforce from a browser accessing the Intranet URL.

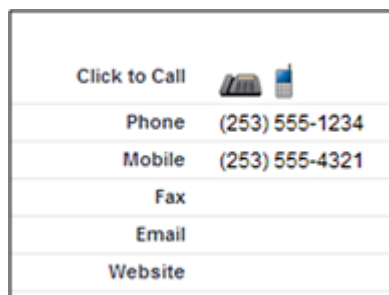
9. Click **Save** at the top or bottom of the page to apply the changes.



10. Repeat steps 7–9 for each user on the account.

Using the Click-to-Call Feature

When the Click-to-Call feature is properly configured, users can make calls via their Barracuda Phone System-connected phone by clicking on the **click-to-call** button for **Phone**  or **Mobile** .

System-connected phone by clicking on the **click-to-call** button for **Phone**  or **Mobile** .



Click to Call  	
Phone	(253) 555-1234
Mobile	(253) 555-4321
Fax	
Email	
Website	

The user must be logged into their Barracuda Phone System user account. The call connects using that account.

Configure Web Application Popups

This section describes how to configure Barracuda Phone System, using the Web Application Popup feature, to show caller information from Salesforce in a pop-up window when agents use the

Communication Command Center.

Choose a Group, Queue, or Advanced Call Router

The Web Application Popup feature can be associated with a Group, a Queue, or an Advanced Call Router action.

Web Application Popup Feature Associated with...	Where Popups Appear
Group	Popups appear for all members of the group, on all incoming calls
Queue	Popups appear only during calls received from the Queue
Advanced Call Router	Popups appear in a recipient Communication Command Center whenever a call is received through that routing

You must create or select the Group, Queue, or Advanced Call Router action before you can apply the Web Application Popup feature. For information on creating and managing Groups, Queues, and Advanced Call Routers, refer to the [Telephone and User Configuration](#) article. During this process, make sure that the proper users are either members of the Group or agents in the Queue you use.

Enable and Set the Web Application Popup Feature

1. If you are not already logged in to a Barracuda Phone System Administrator account, log in now.
2. Open the detail page for the extension or Router action:

Applying the Popup Feature to a...	Navigation Path to Open the Detail and Configuration Page
Group	EXTENSIONS > Groups , then click on the Group .
Queue	EXTENSIONS > Inbound Call Queues , then click on the Queue .
Advanced Call Router action	EXTENSIONS > Advanced Call Routers , then click on the Router . Locate the Rules and Actions table and click the Manage Action Sets button, located under the table. Click the Action Set where you want to add the feature.

3. Select the **Launch Web Application Popup** check box.
4. In the **Web Application Popup URL** field below the checkbox, type the following URL:
https://<your SF domain>/_ui/search/ui/UnifiedSearchResults?searchType=2&str=__CID__
5. Click **Save**.

Using and Troubleshooting the Web Application Popup Feature

After the feature is configured, when a call is received by any

- member of that Group,

- agent who receives a call from that Queue, or
- person who receives a call through the configured Router rule,

that user sees a pop-up window in their active Communication Command Center. The window contains Salesforce information about the caller, based on the Caller ID information.

If the pop-up window does not appear when a call arrives, ensure the following:

- The user is:
 - logged in to Salesforce.
 - a member of the Group or agent of the Queue.
- Pop-up blocking in the user browser is disabled for the Barracuda Phone System domain.
- Your provider is sending full and correct Caller ID information.
- The information in Salesforce is associated with the phone number of the caller.

Figures

1. WebClicktoDial.png
2. clickToCall1.png
3. clickToCall2.png
4. clickToCall3.png
5. federationId.png
6. deskPhoneIcon.png
7. cellPhoneIcon.png
8. clickToCall4.png

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