

Configuring NewVoiceMedia in Salesforce

When you have installed NewVoiceMedia into your host Salesforce Org, you must perform several configuration tasks before you start using it. As you configure your NewVoiceMedia and Salesforce integration, refer to this checklist to ensure that you complete all the required tasks. We recommend that you complete the tasks in the order presented.

Must-do tasks

For new installations, to prepare all versions of NewVoiceMedia in Salesforce you must perform the following tasks:

1. Configure your Salesforce call center to use NewVoiceMedia in your region

Configure the installed call center to use the correct CTI adapter for your region..

2. Set up NewVoiceMedia users in Salesforce

Enable NewVoiceMedia users to use NewVoiceMedia in Salesforce.

3. Link NewVoiceMedia to a Salesforce account

To make and receive calls using NewVoiceMedia in Salesforce, you link NewVoiceMedia to a Salesforce user account.

4. Add ContactPad to Lightning Experience apps

If you are using Salesforce Lightning Experience and what to use ContactPad in a Lightning enabled app, you must add ContactPad to that app.

Optional tasks

You can optionally further customize your installation of NewVoiceMedia for your organization by configuring advanced features.