



Solgari for Salesforce Installation And Configuration Guide

Incorporating:

Package installation and Salesforce setting configuration

Softphone Application Configuration

User Configuration

SMS, WhatsApp, FaceBook Configuration

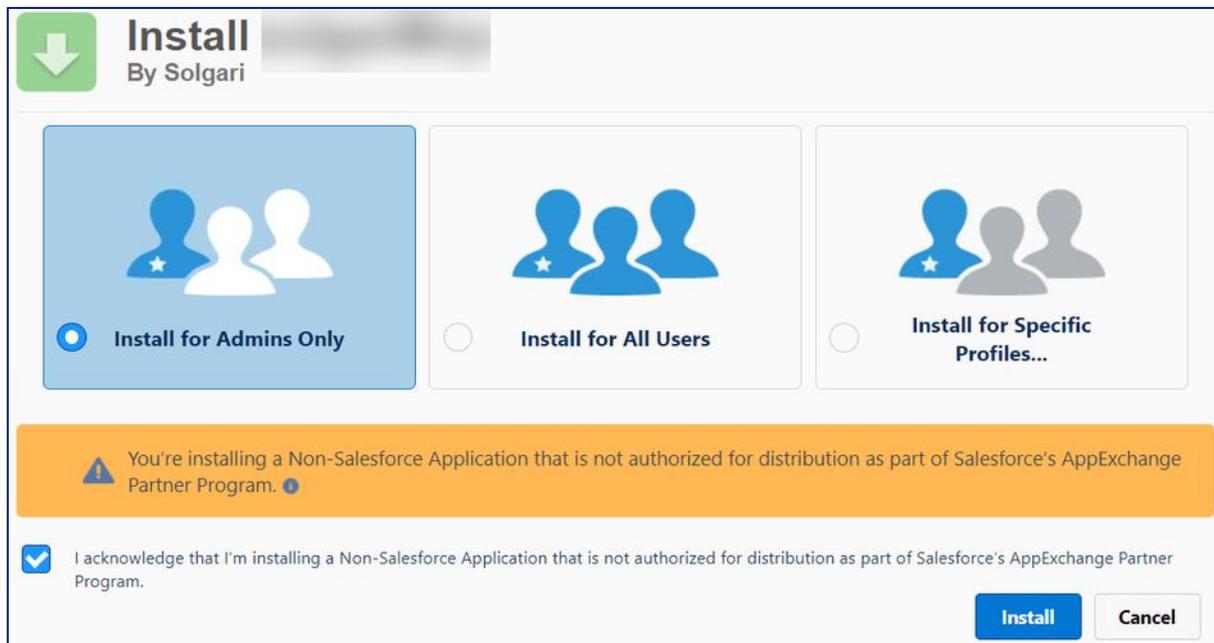
Solgari Softphone Settings

Contents

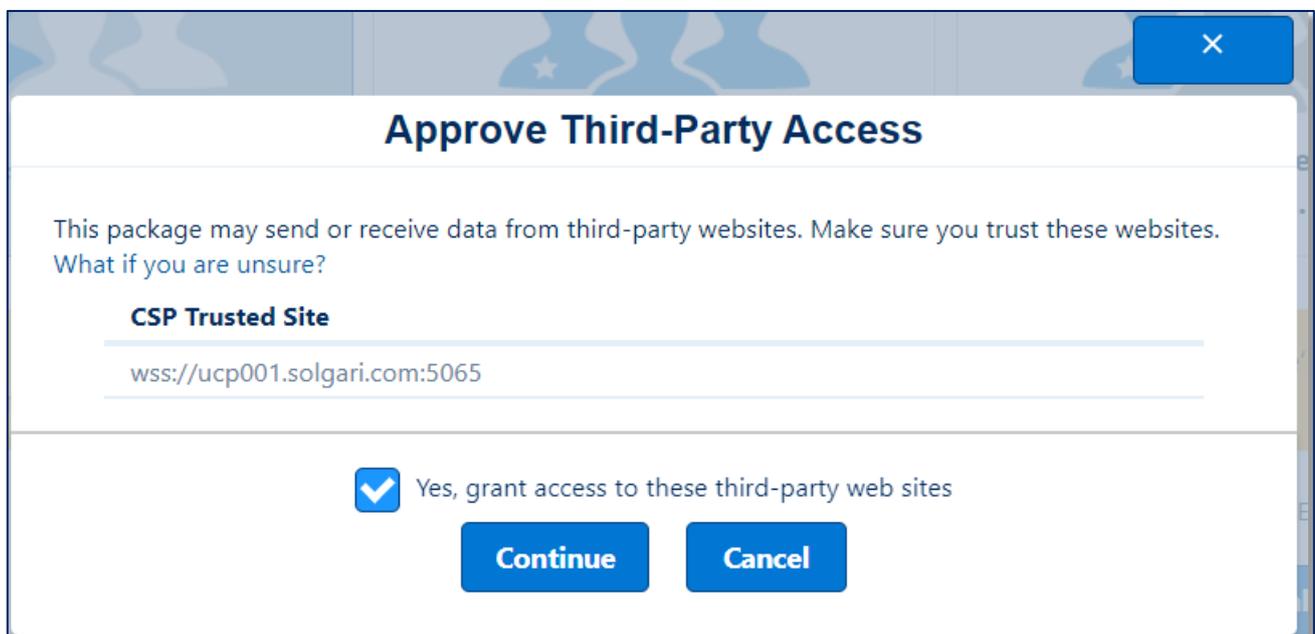
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Package installation and Salesforce setting configuration

1. Install the Solgari Dialer package for that.
 - a. Open or, put the installation link to the browser address bar and click Enter (<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t8d000000q2cIAAQ>)
 - b. Select 'Install for Admin Only'



- c. Approve third-party access by clicking the checkbox and clicking 'Continue.'



2. Go to Salesforce Setup > Sessions
 - a. Select the last provided version for the Lightning Locker API version.
 - b. Use Lightning Web Security for Lightning web components marked as True.

Lightning Locker API Version

Use security enhancements in API version [i](#)

Lightning Web Security

Use Lightning Web Security for Lightning web components [i](#)

3. Set up the Call Center file (see the image below) and assign users.

The screenshot shows the Salesforce Setup interface. On the left, a navigation menu is visible with 'Call Centers' highlighted. The main content area is titled 'Call Center Import' and contains a form for 'New Call Center Import Information'. The form has a field for 'Call Center Definition File' with a 'Choose File' button and the filename 'callcenter.xml' displayed. There are 'Import' and 'Cancel' buttons at the top and bottom of the form. The top navigation bar includes 'Setup', 'Home', and 'Object Manager' tabs, along with a search bar.

Setup Home Object Manager

Search Setup

call

Feature Settings

Service

Call Center

Call Centers

Directory Numbers

Softphone Layouts

Didn't find what you're looking for? Try using Global Search.

SETUP Call Centers

Call Center Solgari Adapter

All Call Centers > Solgari Adapter

Call Center Detail

Edit Delete Clone

General Information

InternalName	SolgariAdapter
Display Name	Solgari Adapter
CTI Adapter URL	/apex/solgariPhone__adapterCallCenterPage
CTI Adapter URL2	/apex/solgariPhone__adapterCallCenterPage
Use CTI API	true
Timeout	10000
Softphone Height	630
Softphone Width	400
Salesforce Compatibility Mode	Lightning

Dialing Options

Outside Prefix	9
Long Distance Prefix	1
International Prefix	01

Call Center Users

Manage Call Center Users

Call Center Users by Profile

Total	0
-------	---

Setup Home Object Manager

Search Setup

call

Feature Settings

Service

Call Center

Call Centers

Directory Numbers

Softphone Layouts

Didn't find what you're looking for? Try using Global Search.

SETUP Call Centers

Call Center Solgari Adapter: Search for New Users

All Call Centers > Solgari Adapter > Manage Users > Search for New Users

Set the search criteria below and then click Search to find salesforce.com users who should be enabled as call center agents. Users already enabled as call center agents are excluded from the

--None-- --None-- AND

Filter By Additional Fields (Optional)

- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 12/9/2022
- For date/time fields, enter the value in following format: 12/9/2022, 12:38 AM

Find

<input type="checkbox"/>	Full Name	Alias	Username
<input type="checkbox"/>	User_Integration	inteo	integration@00d2x0000004doreay.com
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d2x0000004doreay.com
<input checked="" type="checkbox"/>	User_User	UUser	test-dnyxvovvzdx@example.com

- Set up WSS PBX server for a client (multitenant approach - each client has a separate tenant): Need to create a record in Custom Metadata Type. The tech team provide the URL (Depending on the tenant server)

SETUP Custom Metadata Types

Solgari PBX setting

Solgari PBX setting Edit Save Save & New Cancel

Information

Label: WSS Server Protected Component

Solgari PBX setting Name: WSS_Server i

Web Socket Server URL: wss://ucp001.solgari.com:50

Save Save & New Cancel

- Setup Integration with PortSip API (call recordings, conference features). Need to create a new record in App Auth Settings CMDT. The name must be "PortSip_Settings ". The infrastructure team provides credentials from PortSip.

SETUP Custom Metadata Types

All Custom Metadata Types Help for this Page

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define application configurations that need to be migrated from one environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, with all the manageability that comes with metadata: package, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

Action	Label	Installed Package	Namespace Prefix	Visibility	API Name	Record Size	Description
Manage Records	App Auth Setting		solgariPhone	Public	solgariPhone__App_Auth_Setting__mdt	1671	
Manage Records	Solgari PBX setting		solgariPhone	Public	solgariPhone__Solgari_PBX_setting__mdt	395	

SETUP Custom Metadata Types

App Auth Setting

App Auth Setting Edit Save Save & New Cancel

Information

Label: PortSip Settings Protected Component

App Auth Setting Name: PortSip_Settings i Namespace Prefix

Auth Password: [REDACTED]

AuthToken: [REDACTED]

Auth Username: salesforcedev

Host Url: https://ucpdev.solgari.com:£

Host Media Url: https://ucpdev.solgari.com:£

Sid: [REDACTED]

Save Save & New Cancel

6. Setup Integration with Solgari Hub. Need to create a new record in App Auth Settings CMDT. The name must be "Hub_Settings ". Field values are shown below.

Label	Hub_Settings
App Auth Setting Name	Hub_Settings
Host Url	https://api.solgari.com
Client Id	solgari.client
Client Secret	solgariSecret
Scope	solgariApi.read

7. Go to App Launcher and open the Solgari application
8. Navigate to the 'Solgari Softphone Settings' tab. Create new configurations for Standard (Account, Contact, Lead) or Custom objects. For that:
 - a. Click the New button and select an object.
 - b. Populate the Priority field. Value could be from 1 to 99
9. Field Settings section:
 - a. **The Name field.** Allows searches and displays people to call on the Softphone Dialer. Only text fields are available to select.
 - b. **Phone field.** Select any available Phone field. Only Phone fields are available to be selected.
 - i. Click the plus icon to add one more Phone field and select the desired field as the second Phone.
 - ii. [Note]: The order of the phone fields on the Solgari Phone component reflects the phone fields order in the admin part. It's not recommended to use more than 5 phone fields per Object.
 - iii. [Note]: Duplicate Phone fields are not allowed

The screenshot shows the configuration interface for a 'Contact' object. At the top, there is a dropdown menu for 'Object Name' set to 'Contact' and a 'Priority' field with the value '1'. Below this is the 'Fields Settings' section, which contains four dropdown menus for selecting phone fields: 'Name' (set to 'Full Name'), 'Default Phone' (set to 'Mobile Phone'), 'Phone' (set to 'Business Phone'), and another 'Phone' (set to 'Home Phone'). A plus icon is visible to the right of the 'Home Phone' dropdown, indicating the ability to add more phone fields.

10. Related to setting:
 - a. [Object]. Select an object related to the main Object displayed on the active call screen of the Softphone Dialer in the related to section. b.
 - b. [Object]. Display name field. Select a field that is displayed as a Name on the active call screen of the Softphone Dialer in the 'Related to' section.
 - c. [Selected main object] relationship to [Related to Object]. Select the lookup field, which is to be used to find all related to the primary object record. E.g. to find all Opportunity records related to the Account record you are calling. (Labels of the selected objects are updated dynamically).
 - d. [Related to Object] relationship to [Selected main Object]. The exact value used for the selected lookup field is described above. For example, it is just an ID and, in most cases, an ID field. (Labels of the selected objects are updated dynamically).
 - e. [Note]: Creating two configurations for the same objects is impossible. After one configuration has been created for the Object, that Object is filtered out from the search on the New button modal
 - f. Examples for all standard objects:
 - i. Account, Contact, Lead, and connection with Opportunity, Case)

Account

Object Name: Account, Priority: 2

Fields Settings

Name: Account Name, Phone: Account Phone

Related To Setting

Object: Opportunity	Softphone Search field: Name	Opportunity relationship to Account: Account ID	Account relationship to Opportunity: Id
Object: Case	Softphone Search field: Subject	Case relationship to Account: Account ID	Account relationship to Case: Id

Buttons: Delete, Add

Contact

Object Name: Contact, Priority: 1

Fields Settings

Name: Full Name, Phone: Business Phone

Related To Setting

Object: Opportunity	Softphone Search field: Name	Opportunity relationship to Contact: Account ID	Contact relationship to Opportunity: Account ID
Object: Case	Softphone Search field: Subject	Case relationship to Contact: Contact ID	Contact relationship to Case: Id

Buttons: Delete, Add

Lead

Object Name: Lead, Priority: 3

Fields Settings

Name: Full Name, Phone: Phone

Related To Setting

Object: Case	Softphone Search field: Subject	Case relationship to Lead: Contact ID	Lead relationship to Case: Converted Contact ID
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Buttons: Delete, Add

ii. And a Custom object connected with another Custom child object

Custom Contact

Object Name: Custom Contact, Priority: 3

Fields Settings

Name: Custom Contact Name, Phone: Business Phone

Related To Setting

Object: Custom Opportunity, Object Name field: Custom Opportunity Name, Custom Opportunity relationship to Custom Contact: Custom Contact, Custom Contact relationship to Custom Opportunity: Id

11. Go to the Setup > Object Manager > Task standard object
 - a. Select Lightning Record Pages
 - b. Assign "CallPage" to valid Application, Record Type (CallLog) and Profiles
 - c. Assign page layout to Record Type (CallLog)

Setup > Object Manager > Task

Lightning Record Pages

Label	Org Default	App Default	Other Assignments	Modified By
CallPage				Solgan Admin 2, 11/07/2023, 11:12
MessagingPage				Solgan Admin 2, 11/07/2023, 11:12
Solgan Call Page			Desktop (28)	Solgan Admin 2, 12/05/2023, 10:39
Task Record Page	Desktop			Eyad Hamman, 16/07/2025, 18:32

Lightning Page Builder > Pages > CallPage

Task: Terugbelafspraak i.v.m. voicemail gisteren

Activation: CallPage

Custom record pages can be assigned at different levels:

- 1. The org default record page displays for an object unless more specific assignments are made.
- 2. App default page assignment, if specified, overrides the org default.
- 3. App, record type, profile assignments override org and app defaults.

Learn more about Lightning page assignment.

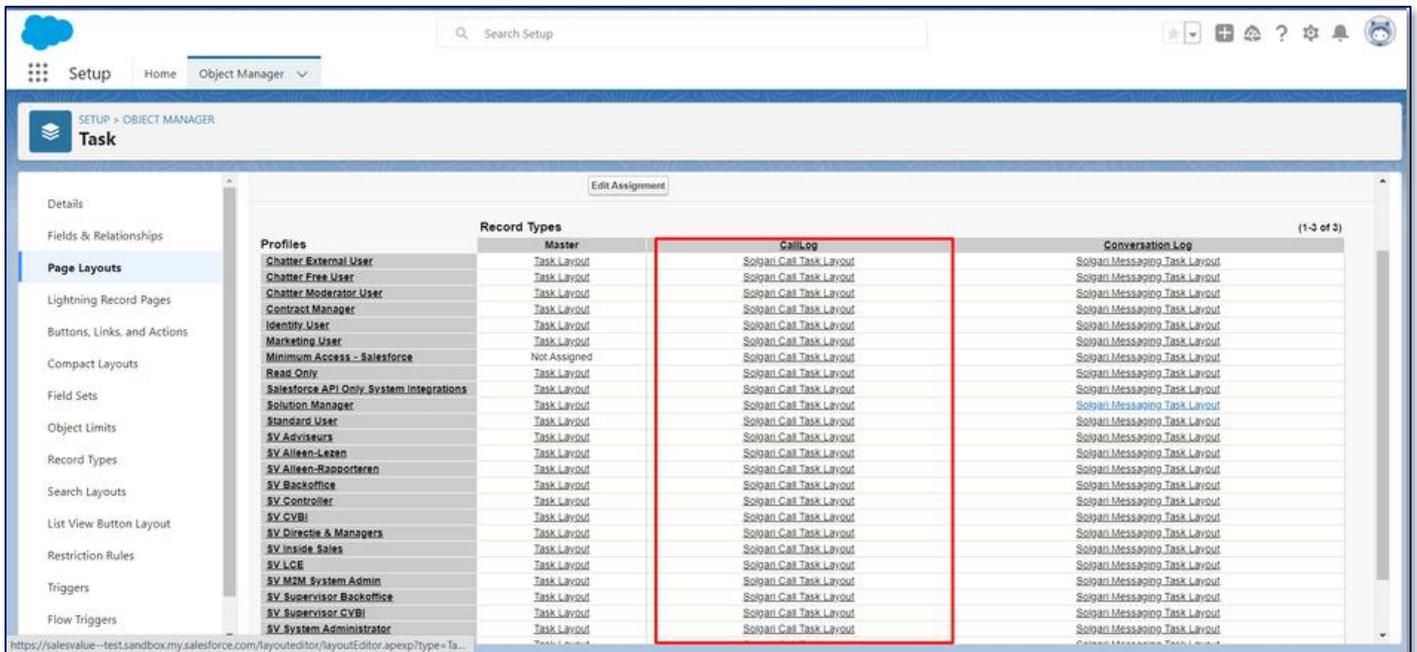
ORG DEFAULT | APP DEFAULT | APP, RECORD TYPE, AND PROFILE

Set this page as the org default to display it for all Task records, except when app default or app record type, or profile-specific assignments are defined.

In standard Salesforce console apps, some objects have a system app default record page. For those objects, if you assign a custom org default page, it doesn't display to users. To enable a custom org default page to show up in the console for those objects, assign a custom page as the app default. Check your assignments.

Assign as Org Default

Close



12. Go to the 'Solgari User Configuration' object tab (It can be skipped because the Login process should be run automatically).
 - a. Click New and select your user in the lookup.
 - b. Populate Solgari User Authorization, Solgari URI, and Solgari User Password with Solgari SIP Settings.

Create Solgari User Configuration

Salesforce User

@ Andrei ×

*Solgari User Authorization

101

*Solgari URI

sip: .com

*Solgari User Password

●●●●●●●●

Cancel
Save

13. Add Users/Agents to Debug Mode in the SF Setup:

Debug Mode Users

Enable debug mode to make it easier to debug JavaScript code from Lightning components. Only enable debug mode for users who are actively debugging JavaScript. Salesforce is s

View: All [Create New View](#)

<input type="checkbox"/>	Full Name ↑	Debug Mode	Alias	Username
<input type="checkbox"/>	Andersen_Test	✓	Anderse	test16@folando.org
<input type="checkbox"/>	Anderssenæøå_Test	✓	tchri	test11@folando.org
<input type="checkbox"/>	Ant-"/EQÅæøå_Anatoly	✓	aanta	anatoly.m@solgariga.com
<input type="checkbox"/>	Chatter Expert	✓	Chatter	chatty_00d8d0000059jxeyxvz1qxfrldr@chatter.salesforce.com

14. Navigate to Salesforce Setup > Call Center.

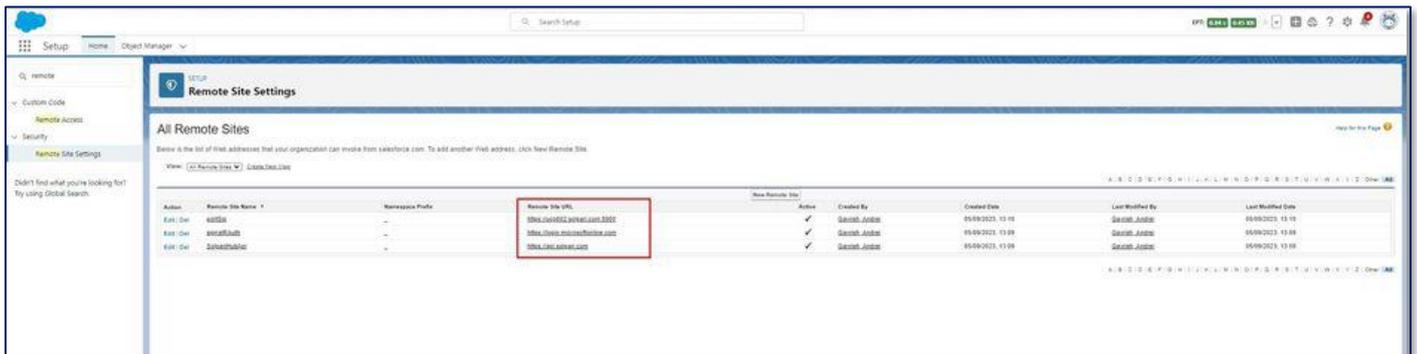
- a. Click on 'Solgari Adapter'.
- b. Scroll down and click 'Manage Call Center Users'.
- c. Find required users using available filters.
- d. Select the from the list and click 'Add to Call Centre'.

15. Create a Custom Permission set with 'Run Flows' App Permissions and assign it to users that should have access to adding users to Call Campaigns.

- a. Also, you can do it on the Profile level if it is more suitable for your user management approach.

Run Flows	<input checked="" type="checkbox"/>	In this org, run any active flow. In Experience Builder sites, run any active flow that's distributed with the Flow Lightning component.
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16. Add URLs to "Remote Site Settings"(ucp003 - this is an example. It is based on the tenant domain and differs from the one you use). Other URLs are static: <https://api.solgari.com>



17. Add URL for call recordings (ucp003 - this is an example. This is changed based on tenant domain)

Setup Home Object Manager

Search Setup

Q CSP

Security

CSP Trusted Sites

Didn't find what you're looking for? Try using Global Search.

SETUP CSP Trusted Sites

Content Security Policy Trusted Sites

Below is the list of Web addresses (URLs) that your organization can use to access resources for Lightning components, either within your organization's Lightning Experience or CSP-Secured Lightning Communities. To use third-party APIs that make requests to an external (non-Salesforce) server, add the server as a trusted site.

To use the Salesforce Console Integration Toolkit JavaScript from within a third-party domain, add that third-party domain as a trusted site here and in the Security settings of the Builder in your Lightning Communities.

View: All Create New View

Action	Trusted Site Name	Trusted Site URL	Active	Context	Created By	Created Date	Last Modified By	Last Modified Date
Edit Del	CallRecordings	https://ucp003.solgari.com:8883	<input checked="" type="checkbox"/>	All	Solgan2	12/05/2023, 10:28	Solgan2	12/05/2023, 10:28
Edit Del	wss_solgari_server	wss://ucp001.solgari.com:5065	<input checked="" type="checkbox"/>	All	Solgan2	12/05/2023, 09:37	Solgan2	12/05/2023, 09:37

Setup Home Object Manager

Search Setup

Q CSP

Security

CSP Trusted Sites

Didn't find what you're looking for? Try using Global Search.

SETUP CSP Trusted Sites

CSP Trusted Site Definition

Content Security Policy Trusted Site Detail

[Edit](#) [Delete](#) [Clone](#)

Trusted Site Name: CallRecordings Modified By: Solgan Admin 2, 12/05/2023, 10:28

Trusted Site URL: https://ucp003.solgari.com:8883

Description:

- Active:
- Context: All
- Allow site for connect-src:
- Allow site for font-src:
- Allow site for frame-src:
- Allow site for img-src:
- Allow site for media-src:
- Allow site for style-src:

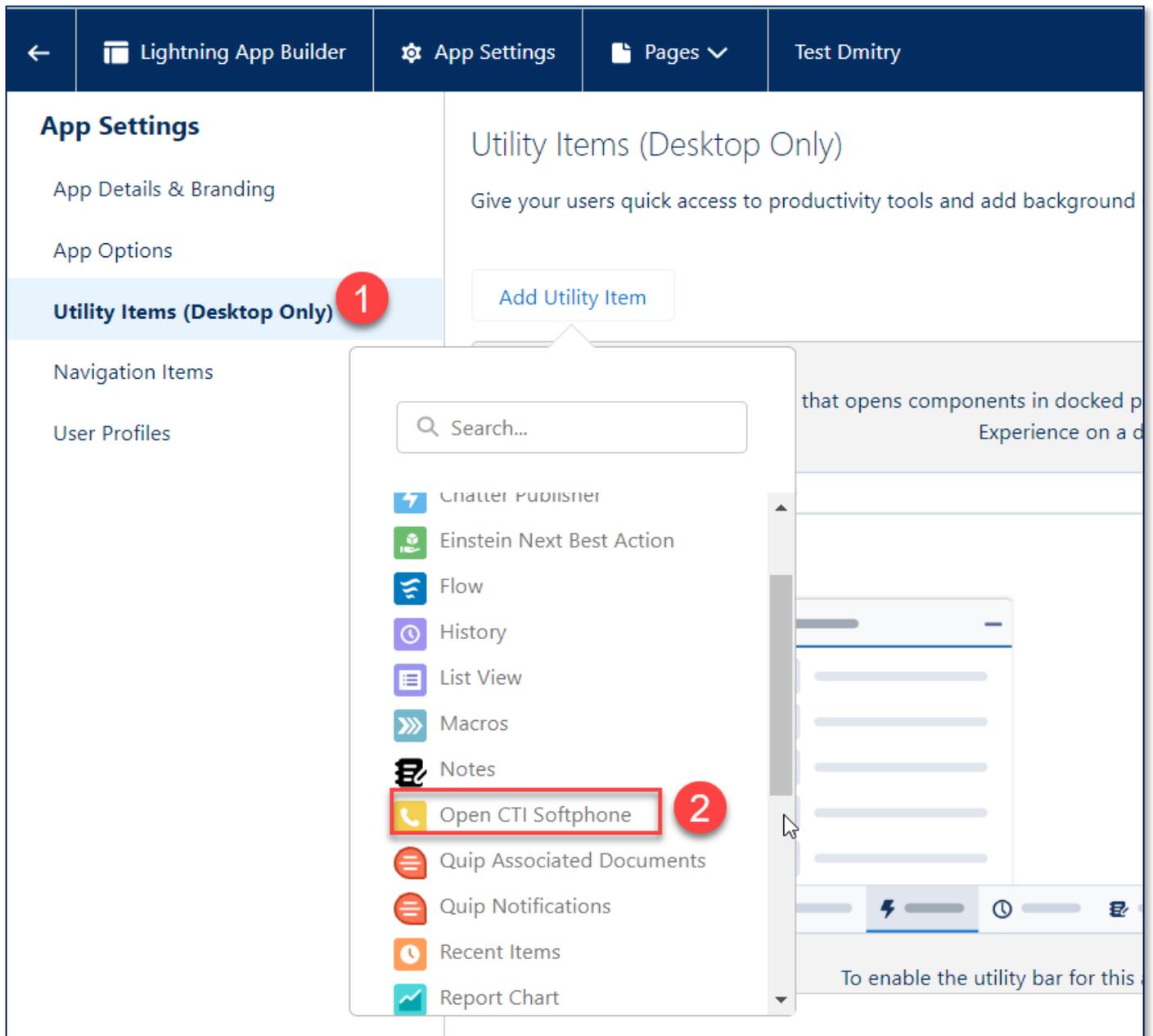
Created By: Solgan Admin 2, 12/05/2023, 10:28

[Edit](#) [Delete](#) [Clone](#)

Call Center File:

Softphone Application Configuration

1. Create or use one of the previously created Lightning Applications.
2. Open utility items.
3. Add 'Open CTI Softphone'.



4. Leave all options by default.[IMPORTANT!] - Changes to the utility bar won't affect anything. If you want to change height/width or other options, navigate to Call Centers (see point 5).

The screenshot shows the configuration interface for a utility bar item. At the top left is a button labeled "Add Utility Item". At the top right, there is a "Utility Bar Alignment" dropdown menu set to "Default". The main area is divided into two sections. On the left, there is a preview area with a phone icon and the label "Phone". On the right, under the heading "PROPERTIES", the item is identified as "Open CTI Softphone". Below this, there is a "Utility Item Properties" section with several fields:

- *Label: A text input field containing "Phone".
- Icon: A selection box showing a phone icon and the text "call X".
- Panel Width: A text input field containing "340".
- Panel Height: A text input field containing "480".
- Start automatically: A checked checkbox.

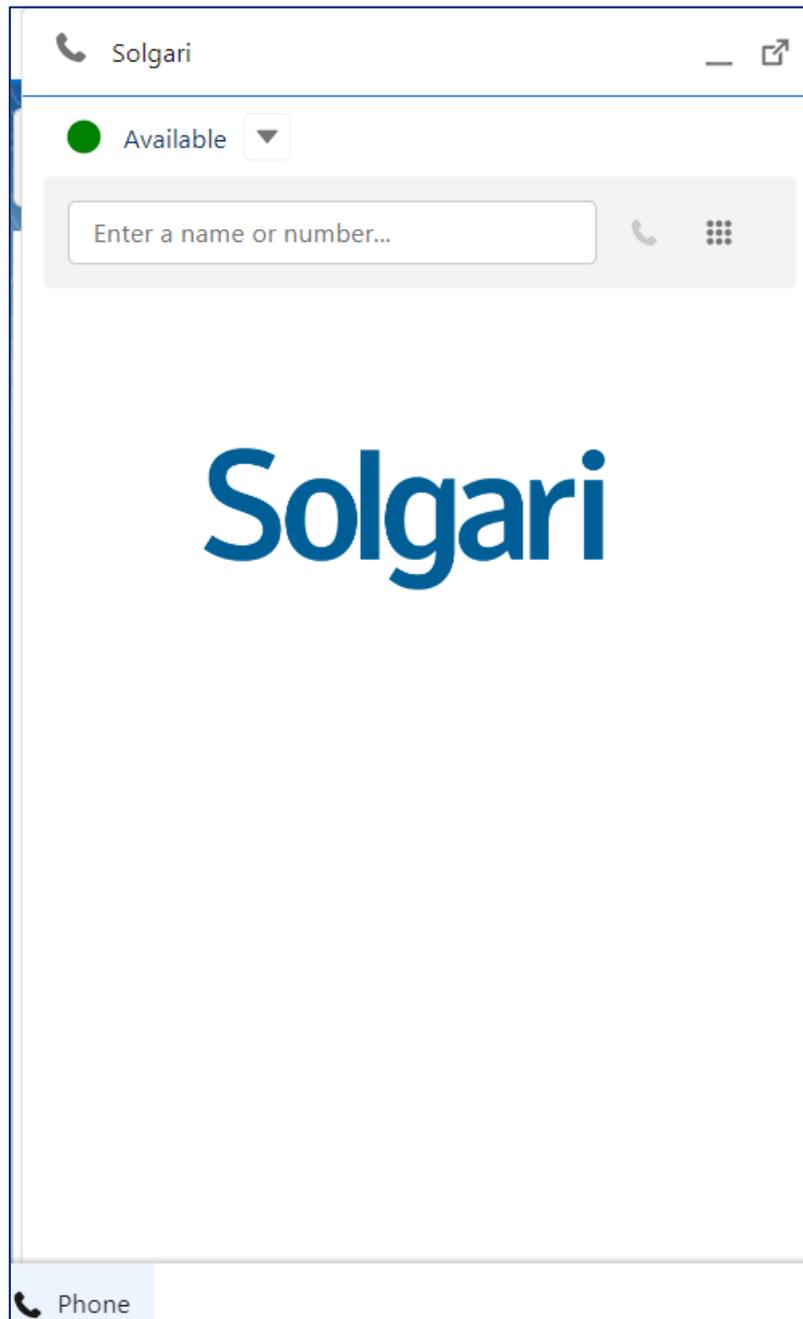
 Each field has an information icon (i) to its right. Navigation arrows (up and down) and a "Remove" button are located at the top right of the properties section.

5. Navigate to Salesforce Call Center > Click Edit to Solgari Adapter Record
 - a. Update Height/Width as you please, but remember that changing values to big/small ones could cause UI issues. The default configuration is: Softphone Width - 400 and Softphone Height – 630

The screenshot shows the "Call Center Detail" page for the "Solgari Adapter". The page title is "Call Center Solgari Adapter" with a breadcrumb "All Call Centers » Solgari Adapter". There are three buttons: "Edit", "Delete", and "Clone". Below the buttons is a table of "General Information":

InternalName	OpenCTI
Display Name	Solgari Adapter
CTI Adapter URL	[REDACTED]
CTI Adapter URL2	[REDACTED]
Timeout	10000
Use CTI API	true
Softphone Height	630
Softphone Width	400
Salesforce Compatibility Mode	Classic_and_Lightning

6. You may navigate to the configured Application and open the Utility Bar with [Solagri Call App]



7. Configure the Add to Call Campaign Button (packaged Flow button).
 - a. Go to the required Object in the Object Manager (only Contact, Account, and Leads are supported).
 - b. List View Button Layout > Edit > Add the 'Add to Call Campaign' as a selected button.

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Hierarchy Columns

Triggers

Flow Triggers

New From Document [NewFromDocument]

New [NewContact]

Add to Campaign [AddToCampaign]

Import [Import]

Add to Campaign [MassAddToCampaign]

Add to Call List [MassCreateCallList]

Send List Email [SendListEmailAction]

Send Message [SendBulkMessageAction]

Printable View [PrintableListView]

Custom Buttons

Available Buttons

--None--

Add



Remove



Selected Buttons

Add To Call Campaign

Up



Down



List View Actions in Lightning Experience

[New Quick Action](#)

Save

Cancel

8. Platform Cache > Add 1Mb Capacity on the Organization level.

SETUP
Platform Cache

▼ **Capacity (MB)**

Total Available

Provider Purchased	0
Organization	9
Total	9

Session Cache Allocation

Provider Purchased	0
Organization	<input type="text" value="0"/>
Provider Free	0
Total	0

Org Cache Allocation

Provider Purchased	0
Organization	<input type="text" value="1"/>
Provider Free	0
Total	1

Total Allocation

Provider Purchased	0
Organization	1
Provider Free	0
Total	1

9. Add a new Call Category.

- Navigate to Object Manager > Activity > Fields > Call Category picklist field
- Scroll down, add a new value to the picklist and select CallLog packaged record type.
- Reorder/Add/Delete values according to your business needs

User Configuration

1. Create a Custom Permission set with 'Run Flows' App Permissions and assign it to users that should have access to adding users to Call Campaigns.
 - a. Also, you can do it on the Profile level if it is more suitable for your user management approach.
2. Assign Solgari Admin or Solgari User permissions according to the users' roles. The Solgari User cannot access the Solgari admin tabs and related functionality; therefore, the Solgari Application cannot be configured.

SMS, WhatsApp, FaceBook Configuration

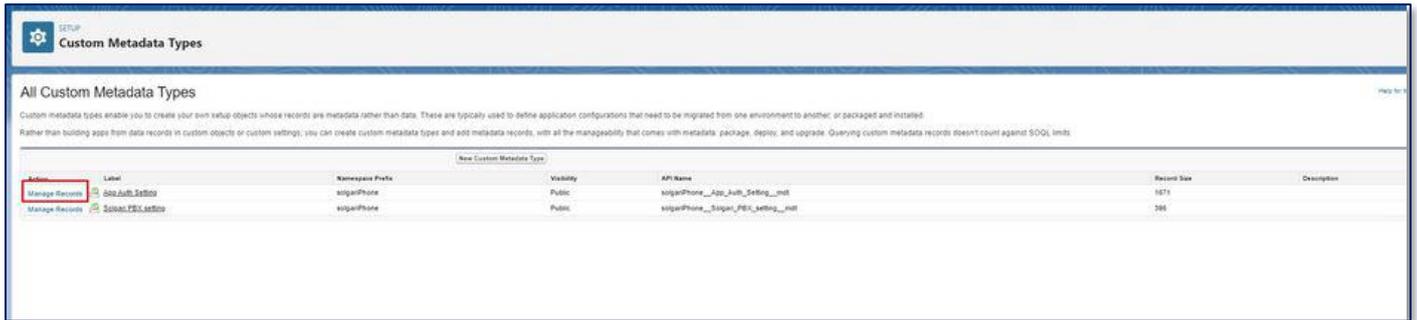
Solgari Softphone Settings

1. Navigate to the 'Solgari Softphone Settings' tab. Create new configurations (if needed) for Standard (Account, Contact, Lead) or Custom objects. For that:
2. Click the New button and select an object.
3. Populate the Priority field. Value could be from 1 to 99.
4. Field Settings section:
 - a. The name field selects field searches and displays people to call on the Softphone Dialer. Only text fields are available to select.
 - b. Phone field. Select any available Phone field. Only Phone fields are available to select.
 - i. Click the plus icon to add one more Phone field and select the desired field as the second Phone.
 - ii. [Note]: The order of the phone fields on the Solgari Phone component reflects the phone fields order in the admin part. It's not recommended to use more than 5 phone fields per Object.
 - iii. [Note]: Duplicate Phone fields are not allowed.

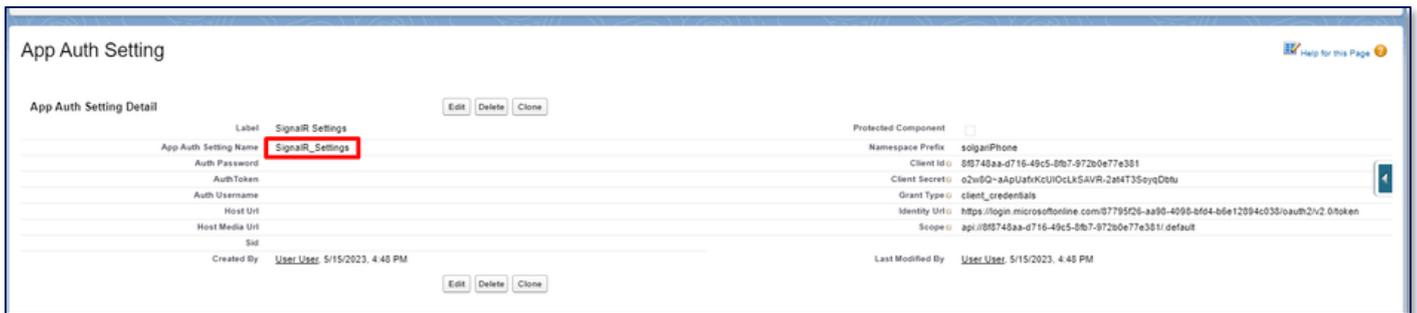
The screenshot shows the configuration interface for a 'Contact' object. At the top, there is a dropdown menu for 'Object Name' set to 'Contact'. Below it is a 'Priority' field with the value '1'. The 'Fields Settings' section contains four dropdown menus: 'Name' (set to 'Full Name'), 'Default Phone' (set to 'Mobile Phone'), 'Phone' (set to 'Business Phone'), and another 'Phone' (set to 'Home Phone'). A plus sign icon is visible to the right of the second 'Phone' dropdown, indicating the ability to add more phone fields.

SignalR Settings

1. Setup App Auth Setting CMDT (custom metadata types).



2. Create a new record with the name: "SignalR_Settings".



3. Copy appropriate field values from the table and paste them to custom metadata record fields (THESE VALUES ARE FOR STAGING AND PROD (TEMPORARY)).

Label	SignalR Settings
App Auth Setting Name	SignalR_Settings
Client Id	8f8748aa-d716-49c5-8fb7-972b0e77e381
Client Secret	o2w8Q~aApUafxKcUIOcLkSAVR-2at4T3SoyqDbtu
Grant Type	client_credentials
Identity Url	https://login.microsoftonline.com/87795f26-aa98-4098-bfd4-b6e12894c038/oauth2/v2.0/token
Scope	api://8f8748aa-d716-49c5-8fb7-972b0e77e381/.default

4. Setup CSP Trusted Sites. Create a new CSP record for each line from the table below. THESE VALUES ARE FOR STAGING ONLY:

Trusted Site Name	Trusted Site URL
SignalR	https://solgari-staging-api-management.azure-api.net
SignalR_Inner_Request	https://solgari-staging-signalr.service.signalr.net
SignalR_WSS	wss://solgari-staging-signalr.service.signalr.net

Content Security Policy Trusted Sites

Below is the list of Web addresses (URLs) that your organization can use to access resources for Lightning components, either within your organization's Lightning Experience or CSP-Secured Lightning Communities. To use third-party APIs that make requests to an external (non-Salesforce) server, add the server as a trusted site.

To use the Salesforce Console Integration Toolkit JavaScript from within a third-party domain, add that third-party domain as a trusted site here and in the Security settings of the Builder in your Lightning Communities.

View: All [Create New View](#)

Action	Trusted Site Name	Trusted Site URL	Active	Context	Created By	Created Date	Last Modified By	Last Modified Date
Edit Del	SignalR	https://solgari-staging-api-management.azure-api.net	<input checked="" type="checkbox"/>	All	UUser	5/15/2023, 4:50 PM	UUser	5/15/2023, 4:50 PM
Edit Del	SignalR_Inner_Request	https://solgari-staging-signalr.service.signalr.net	<input checked="" type="checkbox"/>	All	UUser	5/16/2023, 3:24 AM	UUser	5/16/2023, 3:24 AM
Edit Del	SignalR_WSS	wss://solgari-staging-signalr.service.signalr.net	<input checked="" type="checkbox"/>	All	UUser	5/16/2023, 3:36 AM	UUser	5/16/2023, 3:36 AM
Edit Del	wss_solgari_server	wss://ucp001.solgari.com:5065	<input checked="" type="checkbox"/>	All	UUser	5/15/2023, 3:03 AM	UUser	5/15/2023, 3:03 AM

THIS VALUES FOR **PROD** ONLY:

Trusted Site Name	Trusted Site URL
SignalR	https://teamsapp.solgari.com
SignalR_Inner_Request	https://teams-application-prod-signalr.service.signalr.net
SignalR_WSS	wss://teams-application-prod-signalr.service.signalr.net

Action	Trusted Site Name	Trusted Site URL	Active	Context	Created By	Created Date	Last Modified By	Last Modified Date
Edit Del	SignalR_Inner_Request_NEW	https://teams-application-prod-signalr.service.signalr.net	<input checked="" type="checkbox"/>	All	UUser	6/16/2023, 9:05 AM	UUser	6/16/2023, 9:05 AM
Edit Del	SignalR_NEW_PROD	https://teamsapp.solgari.com	<input checked="" type="checkbox"/>	All	UUser	6/16/2023, 8:56 AM	UUser	6/16/2023, 8:56 AM
Edit Del	SignalR_WSS_NEW	wss://teams-application-prod-signalr.service.signalr.net	<input checked="" type="checkbox"/>	All	UUser	6/16/2023, 9:29 AM	UUser	6/16/2023, 9:29 AM

Other record values should be like on the screen below:

CSP Trusted Site Definition

Content Security Policy Trusted Site Detail

[Edit](#) [Delete](#) [Clone](#)

Trusted Site Name: SignalR Modified By: UUser 5/15/2023, 4:50 PM

Namespace Prefix: solgariPhone

Trusted Site URL: <https://solgari-staging-api-management.azure-api.net>

Description:

- Active:
- Context: All
- Allow site for connect-src:
- Allow site for font-src:
- Allow site for frame-src:
- Allow site for img-src:
- Allow site for media-src:
- Allow site for style-src:

Created By: UUser 5/15/2023, 4:50 PM

[Edit](#) [Delete](#) [Clone](#)

- Configure Remote Site Settings. Create a new Remote Site Setting record for each line from the table below (THESE VALUES ARE FOR STAGING AND PROD (TEMPORARY)):

Remote Site Name	Remote Site URL
hubApiUat	https://solgarihubapiuat.azurewebsites.net
hubIdentity	https://solgarihubidentity.azurewebsites.net
signalRAuth	https://login.microsoftonline.com

All Remote Sites Help for this Page

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

View: [All Remote Sites](#) [Create New View](#)

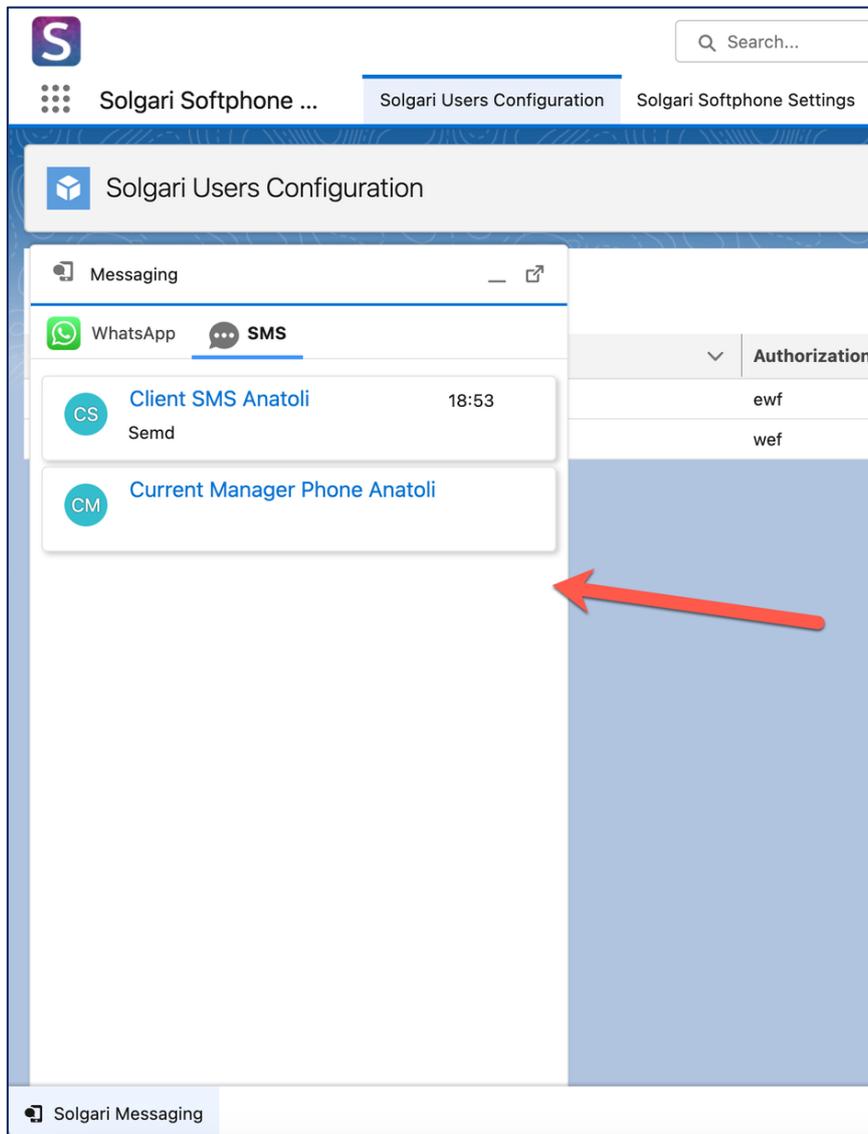
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other [\[All\]](#)

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
Edit Del	AcceDevNet	solgariPhone	http://www.accedevnet.com	✓	User User	5/15/2023, 2:41 AM	User User	5/15/2023, 2:41 AM
Edit Del	chatSettings	solgariPhone	https://solgarihubapiuat.azurewebsites.net	✓	User User	5/15/2023, 8:14 AM	User User	5/15/2023, 8:14 AM
Edit Del	getTokenUrl	solgariPhone	https://solgarihubidentity.azurewebsites.net	✓	User User	5/15/2023, 8:13 AM	User User	5/15/2023, 8:13 AM
Edit Del	Presence Hub	solgariPhone	https://codev.solgari.com:8000	✓	User User	5/15/2023, 4:30 AM	User User	5/15/2023, 4:30 AM
Edit Del	signalRAuth	solgariPhone	https://login.microsoftonline.com	✓	User User	5/15/2023, 4:49 PM	User User	5/15/2023, 4:49 PM
Edit Del	TwilioSd	solgariPhone	https://api.twilio.com	✓	User User	5/15/2023, 3:03 AM	User User	5/15/2023, 3:03 AM

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other [\[All\]](#)

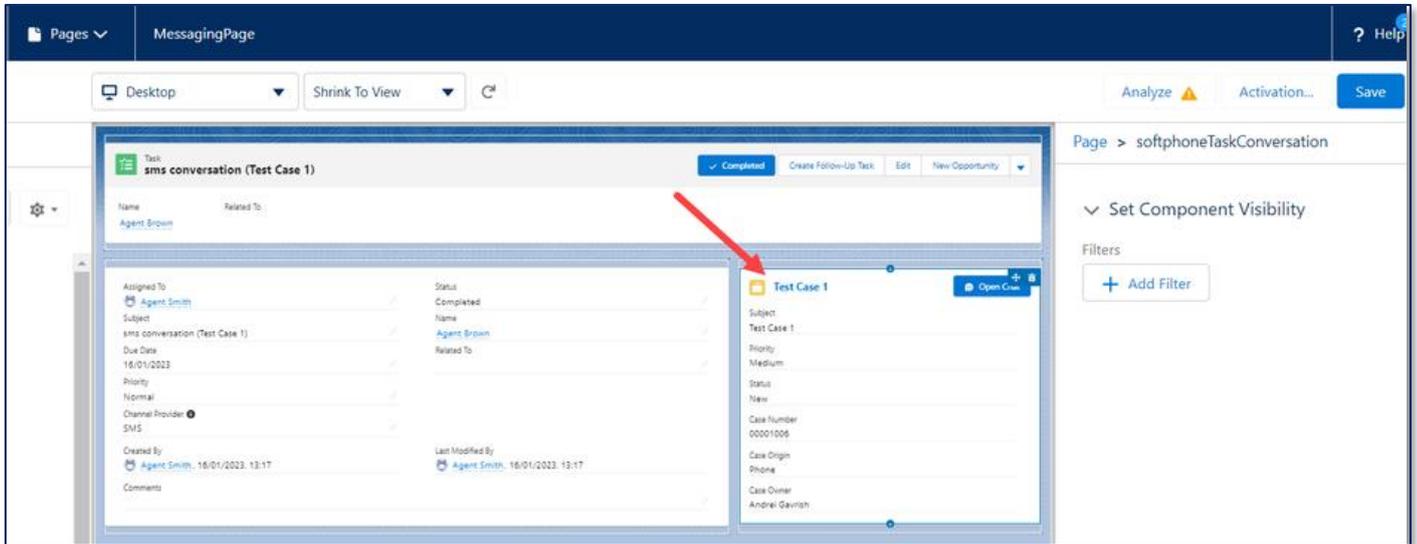
Messaging component configuration

1. Go to Setup → App Manager → Edit App next to any custom application.
2. Utility Items → Add Utility Item → add messagingAuraContainer component.
3. Fill Label; Panel Width: 400; Panel Height: 630.
4. Start automatically > Checked; it must be done to receive notifications.
5. Save configuration.
6. Navigate to the configured Application and open Messaging component using the Utility Bar.

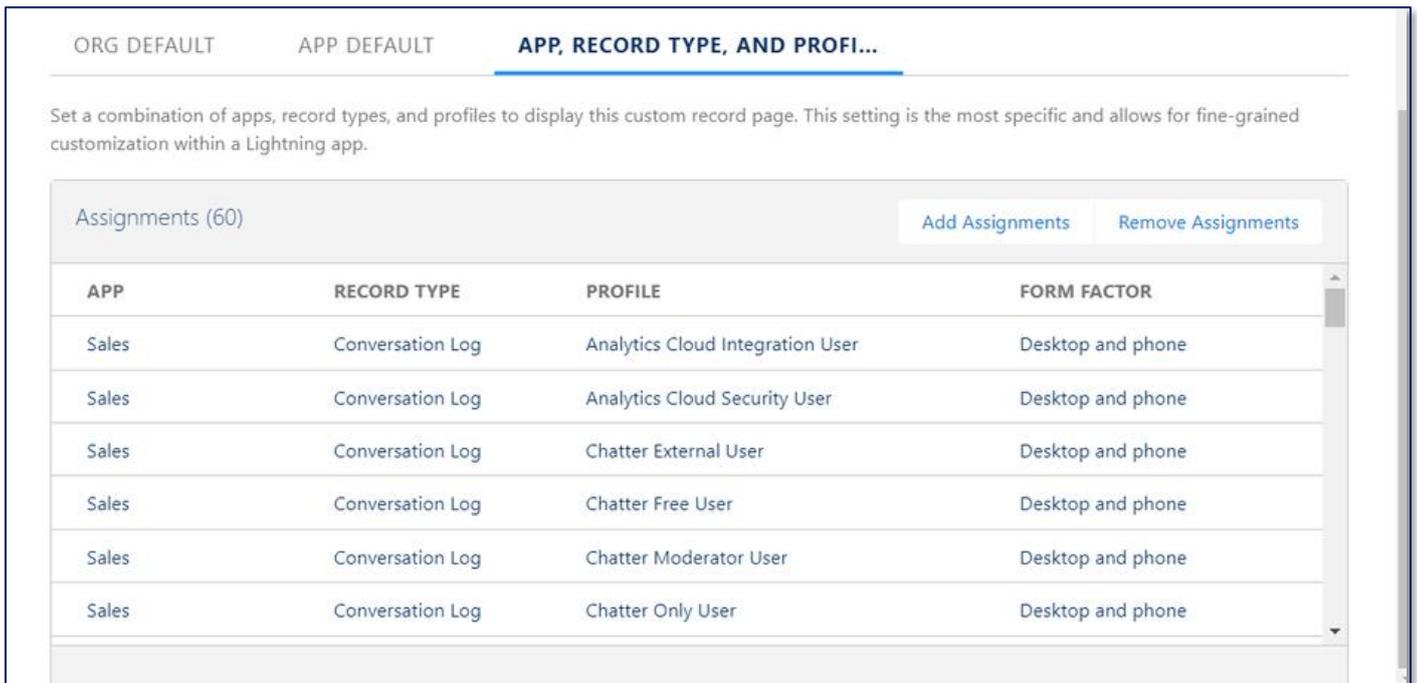


Related to functionality configuration

1. Configure Related To objects in the Solgari Configuration. It's the same configuration that was used for relating.
2. Navigate to Setup > Object Manager > Task> Lightning Pages > Add custom Task Conversation component.



3. Activate the lightning page for the custom Record Type 'Conversation log' and required custom lightning applications.



4. The same operation must be applied to the CallLog page.