MiVoice Integration for Salesforce Administration Guide

DECEMBER 2016

RELEASE 2.1

Mitel®

NOTICE

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Trademarks

MiVoice Integration for Salesforce
Administration Guide
Release 2.1
December 2016
Doc Rls 2, November 2017

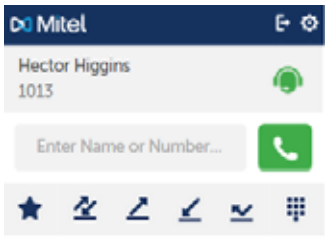
About MiVoice Integration for Salesforce

MiVoice Integration for Salesforce provides a rich set of computer telephony and other user productivity features for browser-based users of MiVoice Business and the Salesforce Customer Relationship Management (CRM) solution. MiVoice features are fully embedded and integrated within the Salesforce contact window (examples shown below) when using an Internet browser and include:

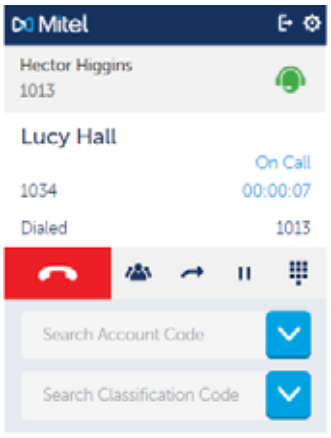
- Inbound features (screen-pop, and answer call)
- Mid-call features (transfer, conference, hold or retrieve call; logging of call notes)
- Outbound features (search for contacts, and click-to-dial)

This document is intended to help system administrators with the installation, configuration, and upgrade of the MiVoice Integration for Salesforce. The *MiVoice Integration for Salesforce User Guide* describes how to use the MiVoice client in the Salesforce environment, and should be provided to users.

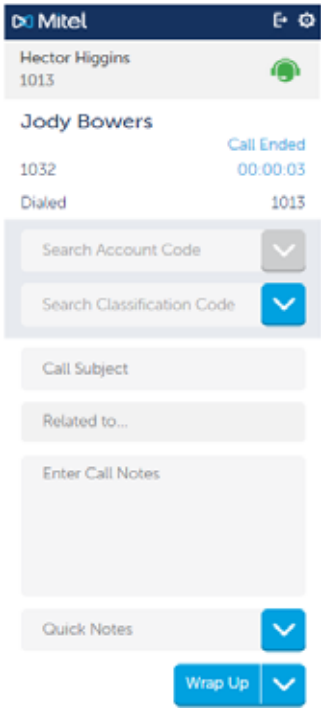
Idle state



Active call



Call Complete



New for MiVoice Integration for Salesforce 2.1

- MiVoice Integration for Salesforce 2.1 is a 64-bit application, so it must be used with Mitel Open Integration Gateway (OIG) 4.0+, and Mitel Standard Linux 10.5.15+.
- When using Salesforce Classic mode, opening an additional web browser tab no longer consumes an additional Salesforce user license for that user.

  Opening MiVoice Integration for Salesforce in multiple browser windows—either on the same computer or a different one—in Classic mode does consume multiple user licenses, and is similarly not recommended. Mitel recommends using Salesforce Console mode (not Classic mode) if multiple web browser tabs are required.
- Using multiple web browser tabs in Salesforce Classic mode produces a different end user experience compared to using one tab; two examples of different UI behavior are screen pop on incoming call and displayed call status when tab opened after call is ringing or answered. All needed tabs should be opened at same time. Users wanting multiple web browser tabs in classic mode should test the UI to see if it meets their needs.
- Supports the new Mitel 6900 MiNET Phone series, when used with MiVoice Business 8.0+.

Important Notes:

When upgrading from Mitel OIG Release 3.0 to Release 4.0:

1. Remove the MiVoice Integration for Salesforce blade in OIG 3.0 **before** upgrading to OIG 4.0.
2. In OIG 4.0, install the new MiVoice Integration for Salesforce blade (Release 2.1.6).

Note: OIG 4.0 is a 64 bit solution that uses a 64 bit Salesforce blade. OIG 3.0 is a 32 bit solution that uses a 32 bit Salesforce blade.

This document contains the following sections:

Installation and configuration

Install and configure the Mitel MiVoice Integration for Salesforce by completing the following procedures. The prerequisites and each procedure must be completed for the integration to be successful.

Note: The Salesforce solution must use HTTPS for all web services communication.

Prerequisites

To simplify installing and configuring the MiVoice Integration for Salesforce, ensure the following prerequisites are met:

- MiVoice Business is configured and functional.
- The IP address of the MiVoice Business server is available.
- Open Integration Gateway (OIG) is installed and functional, and the MiContact Center Business has been added to the OIG as a Network Element. See the *OIG Installation and Maintenance Guide* for instructions.
- Telephone sets are programmed and functional for each user.
- The mapping of each Salesforce user phone number (DN) to a specific MiVoice Business Controller IP address is defined.
- To prepare Salesforce users:
  - If using Windows Authentication, then the e-mail address configured for the user in Salesforce must match the e-mail address that is configured for the Employee in MiContact Center YourSite Explorer.
  - If the user's user name and password are defined and managed in the MiContact Center Business product, this e-mail address matching is not necessary.
- Licensing is in place for
  - Mitel OIG server (OIG or MiVoice Integrations Base Package, virtual or physical) is functional and licensed for MiVoice Integration for Salesforce.
  - MiVoice Integrations require a MiVoice Integration license using one of the deployment options. Refer to the *Mitel OIG Installation & Maintenance Guide* for details.
  - If using the MiContact Center Business, additional licensing is in place for Advanced Call Control, MiContact Center, and MiVoice Integration for Salesforce.
  - Salesforce licenses must be purchased directly from Salesforce.

  Note: If there are problems with any of the licenses, the errors will be displayed to users.
- The FQDN (required for CA certificates) of the Mitel OIG server is available.
- MiVoice Integration for Salesforce **local password**, configured in the Mitel OIG, is available.
- A certificate strategy for the Mitel OIG server is in place. If remote users plan to use MiVoice Integration for Salesforce, then a MiVoice Border Gateway with web proxy service must be

used to proxy remote requests to the Mitel OIG server within the enterprise, and the MiVoice Border Gateway server must also have a CA certificate.

Note: Installing a CA certificate on the Mitel OIG server is required.

- A MiVoice Border Gateway web proxy server (MBG 9.2 or later) is required to enable remote Salesforce users (outside the Enterprise Network) access to the MiVoice Integration for Salesforce web application. The MBG web proxy allows a web browser with Salesforce and MiVoice Integration to access the Mitel OIG server within the Enterprise. See the *MiVoice Border Gateway Installation & Maintenance Guide* for instructions on how to configure the web proxy feature for MiVoice Integration.

  Note: The WAN-side FQDN for the Mitel OIG server used for the remote Mitel OIG application must match the LAN-side FQDN for the Mitel OIG server within the enterprise network when configuring the Mitel MBG web proxy.

- Add the Mitel OIG to the SDS Sharing network with MiVoice Business Cluster. See the *Mitel OIG Installation & Maintenance Guide* for more information.
- For MiContact Center Business (MiCC) only: MiContact Center is configured and connected to the MiVoice Business controller. The IP address of the MiContact Center server is available.

Install MiVoice Integration for Salesforce

1. Log in to Mitel Standard Linux (MSL).
2. Click on **Mitel OIG** to get to the Mitel OIG console.
3. Under ServiceLink (left column), click **Blades**.
4. Install the **MiVoice Integration for Salesforce** blade. For details, see the MSL online help.

Download the MiVoice Integration for Salesforce

1. Open the Salesforce App Exchange website:

   https://appexchange.salesforce.com.

2. Login using your Administrator credentials.

   Note: https://appexchange.salesforce.com/gettingStarted provides help with using the Salesforce App Exchange website.

3. Search for **Mitel MiVoice Integration for Salesforce** on the Salesforce App Exchange.
4. Mouse-over the application in the results list, and click **More** from the list that appears.

   A page opens with details about the application.

5. Click **Get It Now**.

   The page refreshes with a choice of installing in Production or in a Sandbox.

6. Select the **Sandbox** or **Production** install.

Enter your administrator credentials and acknowledge the user terms.

Note: Mitel recommends testing your MiVoice Integration for Salesforce in a sandbox environment before deploying to production. Sandbox installations may require additional information related to setting up a test environment.

7. Click **Continue** to download the MiVoice Integration for Salesforce managed package.
8. Acknowledge each of the messages that is presented.

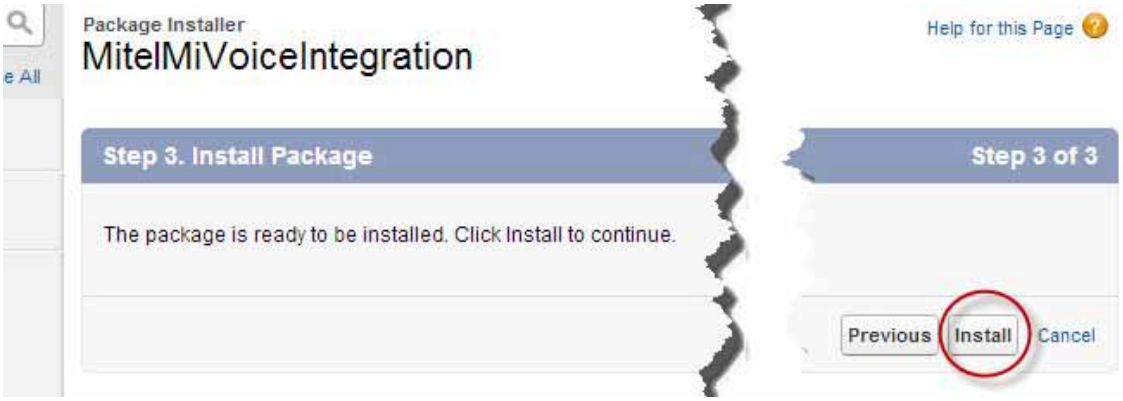
   When the series of prompts is completed, the Mitel MiVoice Integration for Salesforce package is ready to be installed.

Run the MiVoice Integration for Salesforce package installer

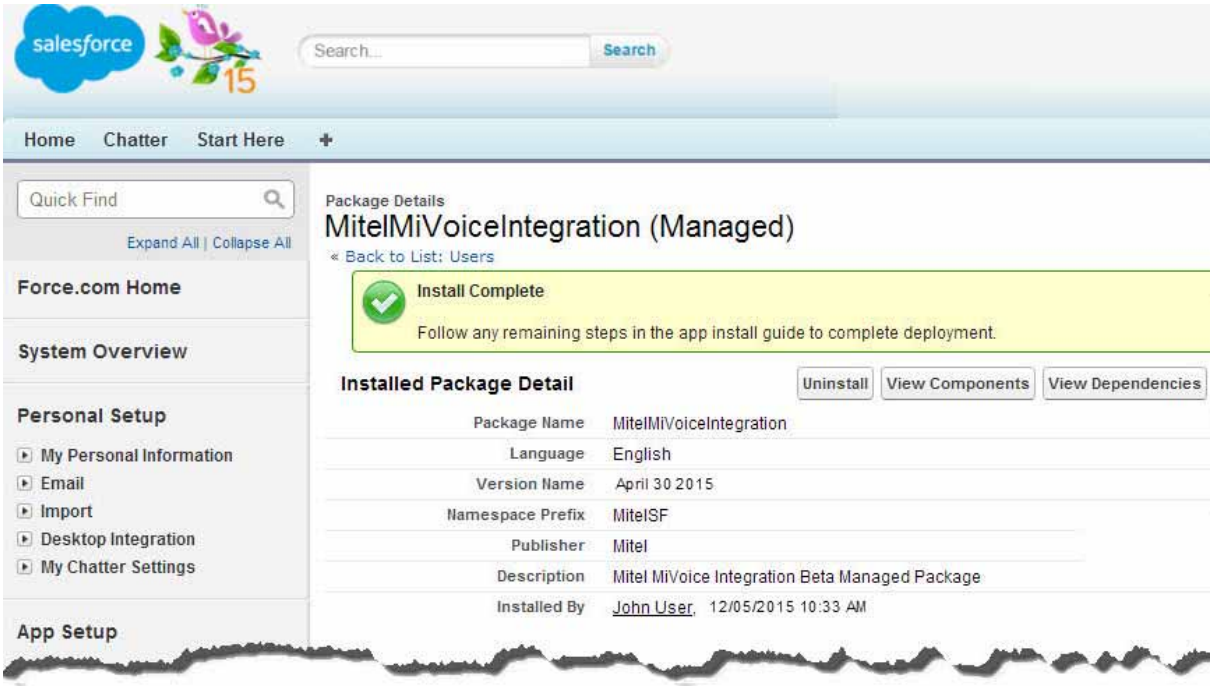
1. Approve the Package API Access.

   For typical installations, the access permissions can be left at their default values.
2. Select the security level.

   The recommended selection is **Grant access to all users**.
3. Click **Install** to install the packaged API.



4. Salesforce indicates that the MiVoice package installation is complete.



Configure Call Centers

After the installation is complete, you must customize a Salesforce Call Center for each MiVoice Business controller that will be used and add Salesforce users to each Call Center. Each Salesforce user must have a custom user profile that allows access to the MiVoice Business objects.

For example, if a MiVoice Business system cluster has two controllers, A and B, and there are 50 user phones on each controller, the Salesforce administrator must create two Salesforce Call Centers (one for each controller). The Salesforce user accounts for the 50 phones on controller A are assigned to call center A. The Salesforce user accounts for the 50 phones on controller B are assigned to call center B.

Note: There is one and only one Salesforce Call Center for each MiVoice Business instance.

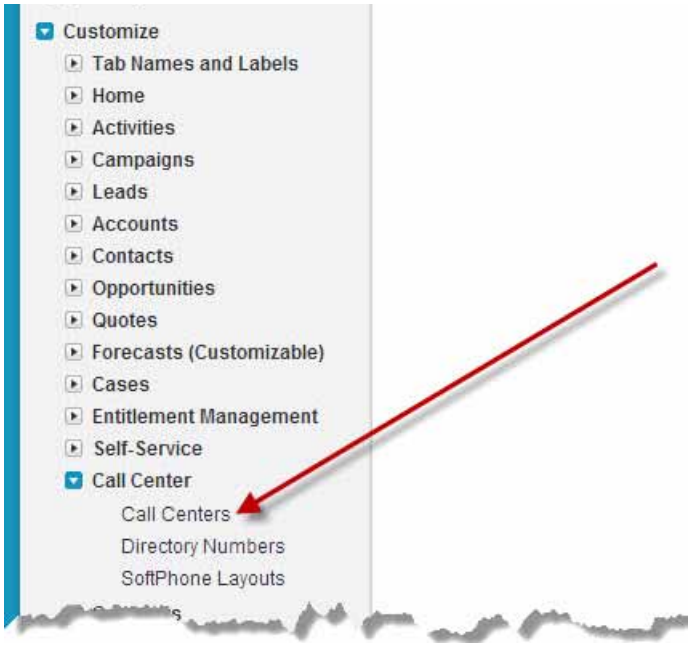
1. Log into Salesforce with your administrator credentials.
2. Click **Setup** in the Salesforce banner if your default view is not the administration setup view.

   A menu of items appears on the left side of the screen.
3. Select **App Setup** > **Customize** > **Call Center.**

Note: App Setup field is set to **Build in** the Salesforce sandbox environment.

4. Click **Call Centers**.

   The main part of the screen is refreshed, displaying a list of configured Call Centers.



5. Click **Edit** for the Call Center you want to configure.

   The screen is refreshed with the Call Center details.

6. Enter the Call Center configuration details on the **Call Center Edit** screen. See Figure 1.

   These settings apply to all users on this Call Center.

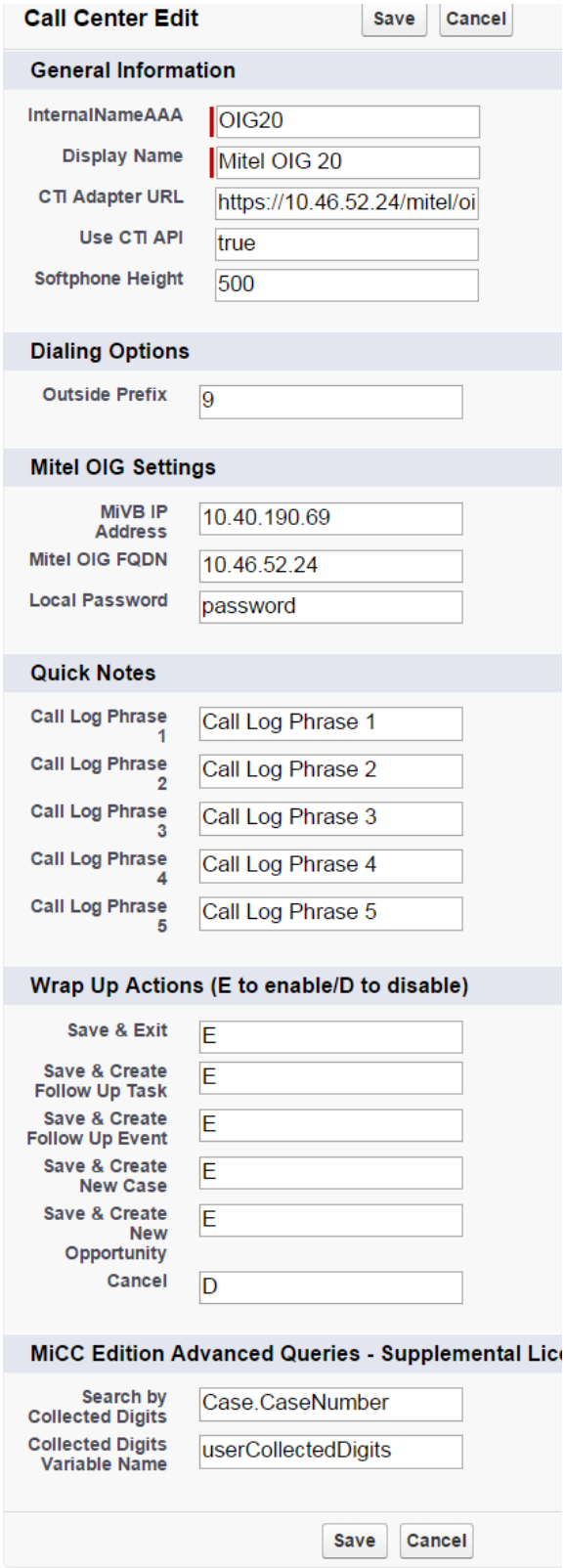
7. Enter all of the required values, and additional values, if desired. Required fields are marked with red bars.

8. Click **Save**.

   The screen refreshes to view mode for the call center details.

9. Edit any additional Call Centers (one call center for each MiVoice Business system), as required.

Figure 1: Call Center edit screen



General Information

- **InternalNameAAA** - Enter a unique internal name. The name can be up to 40 alphanumeric characters, and must start with an alphabetic character
- **Display Name -** Enter a unique display name. Salesforce agents may use this name to identify the server they are using.
- **CTI Adapter URL** - Replace the displayed address with the actual FQDN of your OIG server. The FQDN is required for working with CA certificates.

Example: https://oig161.mitel.com/mitel/oig/OIGSalesForce/

Note: The CTI Adapter URL **MUST** end with a /

- **Use CTI API** - Leave this at its default value - **true**
- **Softphone Height** - NO LONGER USED

Dialing Options

- **Outside Prefix** - This setting is no longer used - provided for S/W backward compatibility

Mitel OIG Settings

- **MiVB IP Address** - Enter the IP address of the MiVoice Business server
- **Mitel OIG FQDN** - Enter the same FQDN of the OIG server as entered for the CTI Adapter URL.

Example: oig161.mitel.com

- **Local Password -** The Local password must match the Local Password defined on the OIG under **Allowed Application**:> **Mitel** > **MiVoice Integration for Salesforce**

Quick Notes

- Each entry is a phrase that agents can add to their call logs without typing. Enter the most commonly used call notes.
- Blank entries are not used.

Wrap Up Actions

- Choose a maximum of five wrap-up actions
- Setting **Cancel** to Disable (D) will force users to enter a wrap-up action
- If no wrap-up action is specified, ending a call will automatically save any call logs and return the agent's client to the idle state.
- Entering an **E** for any wrap-up action forces the agent to choose a wrap-up action for each call.
- Only the Enabled wrap-up actions will be listed for the agents on this call center.

MiCC Edition Advanced Queries

This configuration item is used only when the system is integrated with Mitel MiContact Center (MiCC). Supplemental licensing is required.

- **Search by Collected Digits** - Enter the *object* to search on for directing to the correct queue. To configure Advanced Queries, indicate the *object* field, where *object* can be **Campaign**, **Contact**, **Lead**, **Account**, **Opportunity**, or **Case**. Field can be a standard Salesforce field or a custom field. The field type must be **Text**, **Phone** or **Number**.
- **Collected Digits Variable Name** - MiCC server provides collected digits for every call. If there are multiple MiCC Workflows, they must all use the same Collected Digits Variable Name. Default: **userCollectedDigits**.

Configure the MiCC Edition Advanced Queries field

In setting up the search for collected digits, you must configure what kind of object the system will match on for displaying pop-up windows.

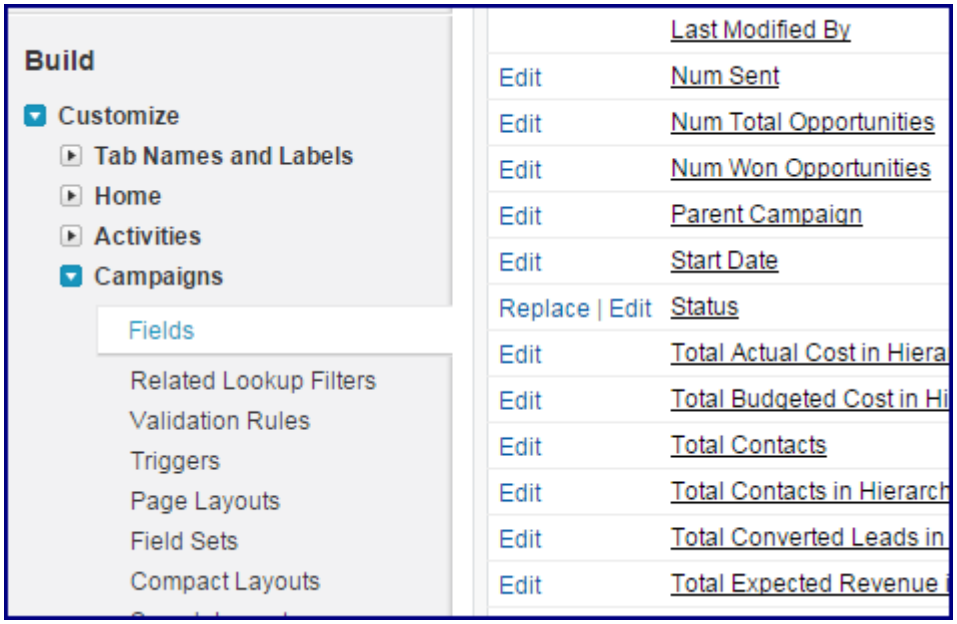
Table 1: Configuring Advance Queries field

	FIELD NAMES
Campaign	Campaign Name
Contact	Assistant (AssistantName) Asst. Phone (AssistantPhone) Data.com Key (Jigsaw) Department (Department) Description (Description) Mobile (MobilePhone) Phone (Phone) Other Phone (OtherPhone) Title (Title)
Lead	Company (Company) Company D-U-N-S Number (CompanyDunsNumber) Data.com Key (Jigsaw) Mobile (MobilePhone) Phone (Phone) Title (Title)
Account	Account Number (AccountNumber) Account Site (Site) Data.com Key (Jigsaw) Company D-U-N-S Number (CompanyDunsNumber) NAICS Code (NaicsCode) NAICS Description (NaicsDesc) Phone (Phone) SIC Code (Sic) SIC Description (SicDesc) Trade Style (Tradestyle) Year Started (YearStarted)
Opportunity	Next Step (NextStep) Opportunity Name (Name)
Case	Case Number (CaseNumber) Contact Fax (ContactFax) Contact Mobile (ContactMobile) Contact Phone (ContactPhone) Internal Comments (Comments) Web Company (SuppliedCompany) Web Name (SuppliedName) Web Phone (SuppliedPhone)

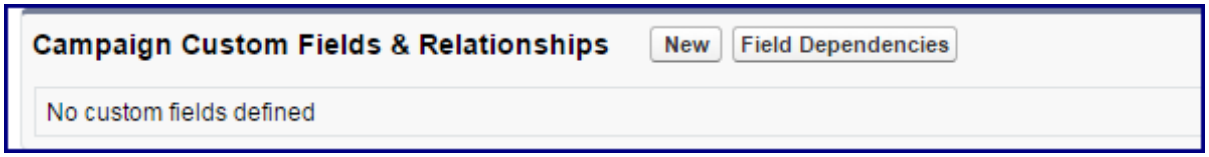
Add a Custom field for DNIS search

Use the following procedure to add a custom field for collected digits.

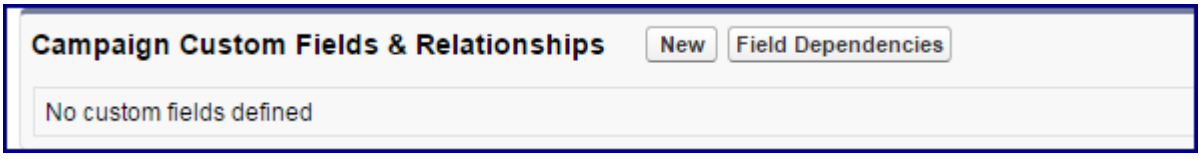
1. In Salesforce Administration, navigate to **Setup** > **Build** > **Customize** > **Fields**, as shown in the following graphic.



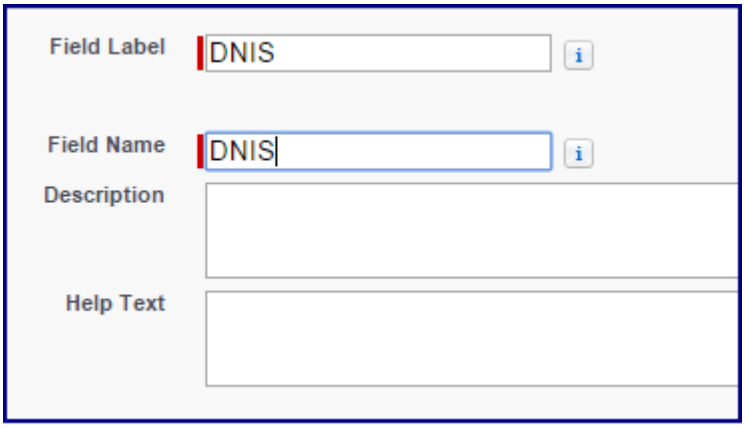
2. Scroll to **Campaign Custom Fields and Relationships**, and click **New**.



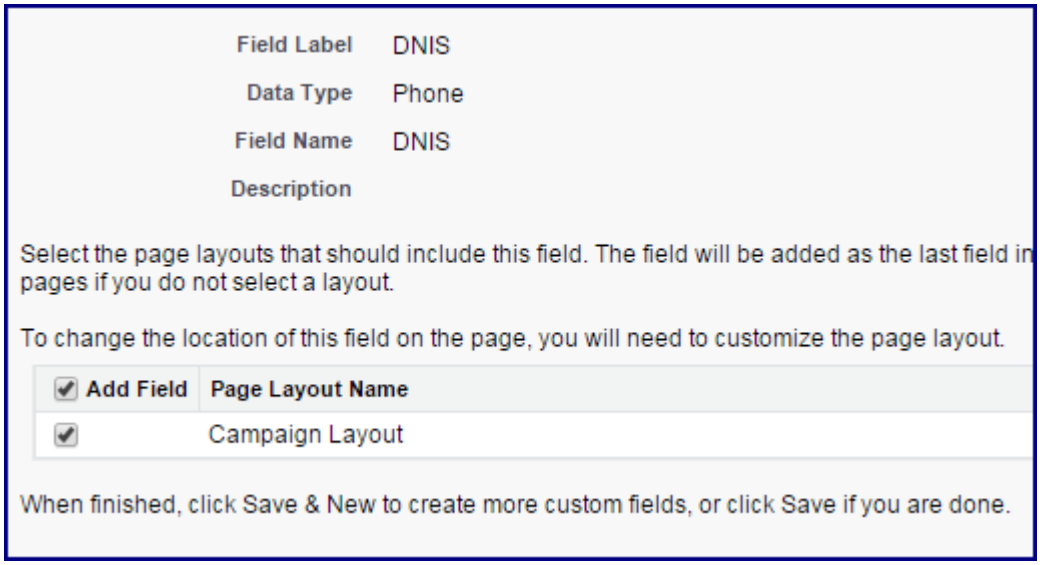
3. In the wizard:
   a. Choose the field type. Select **Phone** and click **Next**.



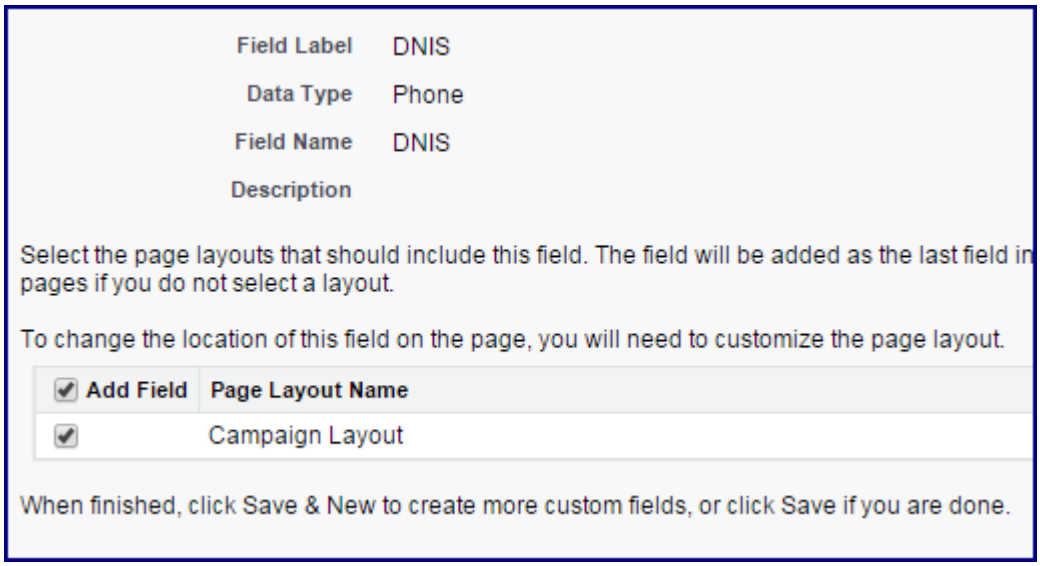
   b. Enter the details. Enter “DNIS” in **Field Label** and in **Field Name**, and click **Next**.



c. Establish field-level security. Leave all fields at their default values (no changes), and click **Next**.

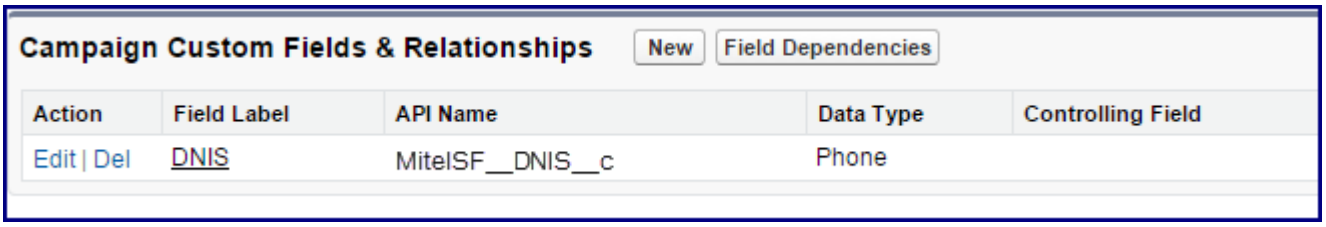


d. Add to page layouts. Leave all fields at their default values (no changes), and click **Next**.



e. To create another custom field, click **Save & New**. Repeat the procedure through the wizard.

f. To save and exit the wizard, click **Save**.

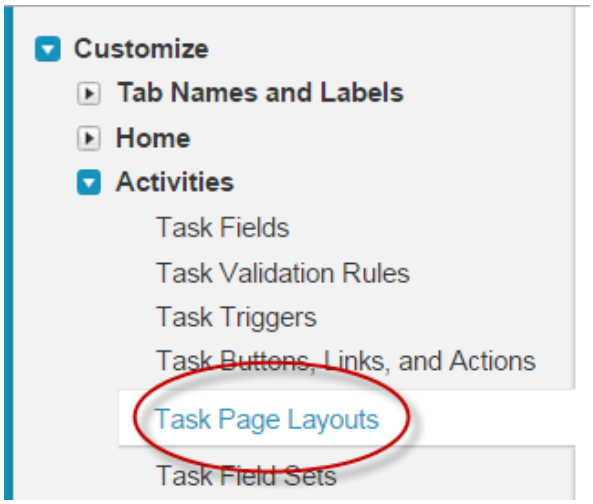


Logging call duration

You can configure Salesforce to log the duration of the calls.

To enable logging call duration:

1. In the Salesforce user interface, click **Setup**.
2. On Setup page, navigate the menus on the left side of the page: **Customize** > **Activities** > **T ask Page Layout.**



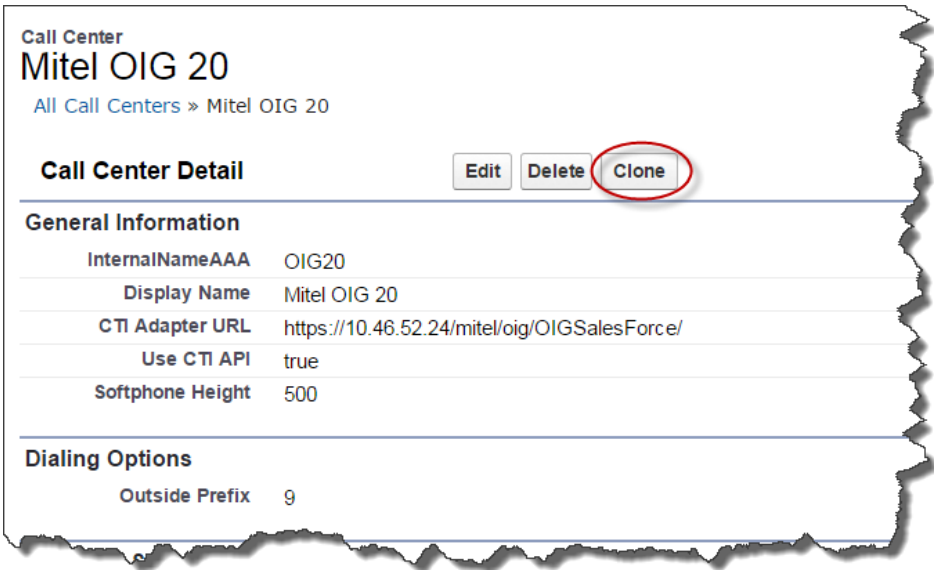
3. In the Task Layout, click **Edit**.
4. Drag and drop **Call Duration**, **ANI**, and **DNIS** to the **Task Detail** below.

Create a new call center

A new MiVoice Business controller can be added quickly by cloning a server that is already configured in Salesforce.

1. If you are already in the view mode of the Call Center, go to step "4".
2. Navigate to the list of Call Centers as you did in steps "1" to "4" of "Configure Call Centers" on page 6.
3. Click the name of an existing MiVoice Business Call Center.

   The screen refreshes with all the configuration details of the Call Center.



4. Click **Clone**.

   A call server edit screen opens with the same details as the Call Center that was cloned.

5. Enter a new internal name.

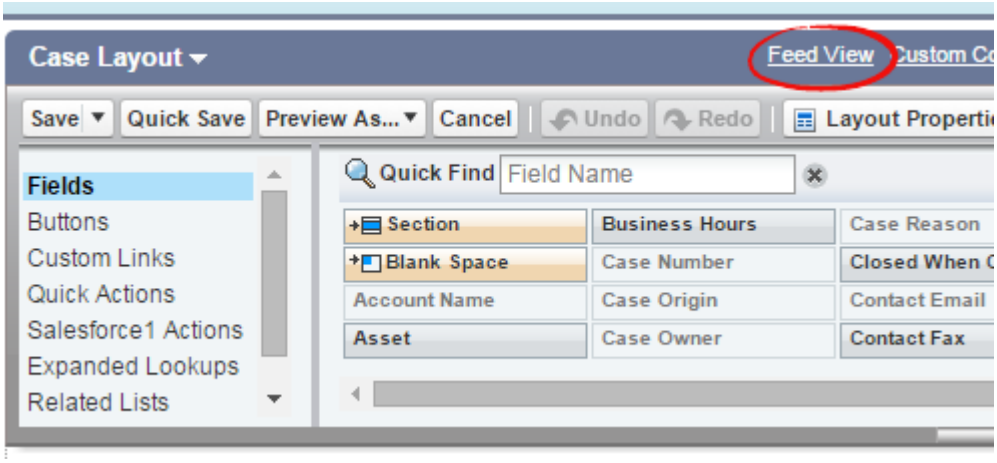
   You must enter a new internal name before the Call Center can be saved.

6. Edit any other Call Center details.

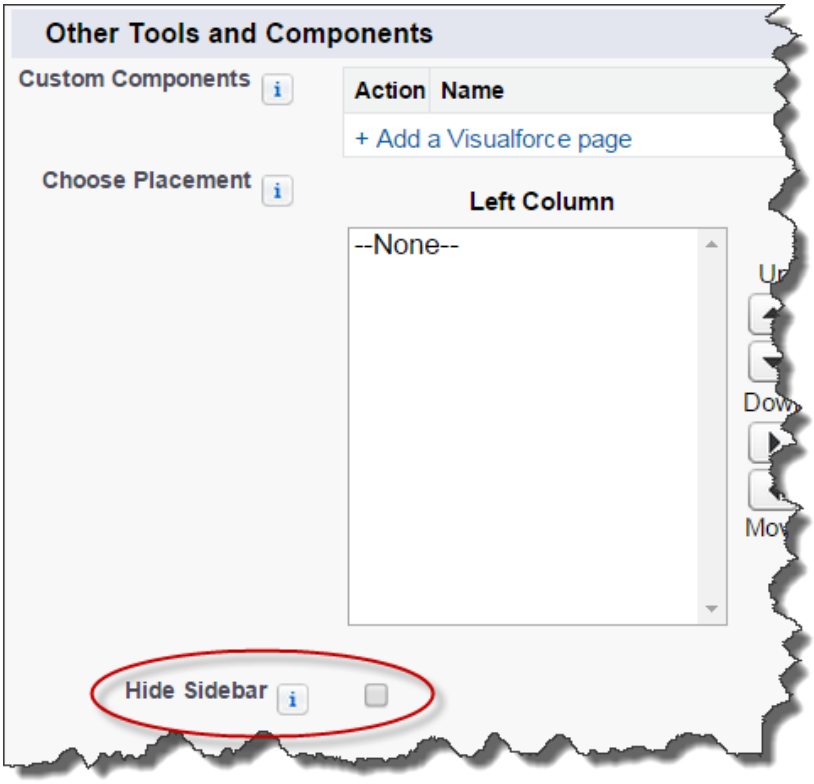
7. Click **Save**.

Enable the sidebar for Cases

1. In **Setup**, navigate to **Customize** > **Cases** > **Page Layouts**.
2. For the **Case Page Layout,** click **Edit**.



3. Click **Feed View**.
4. Scroll down to the **Other Tools and Components** section.



5. Deselect **Hide Sidebar**.

Add users to a Call Center

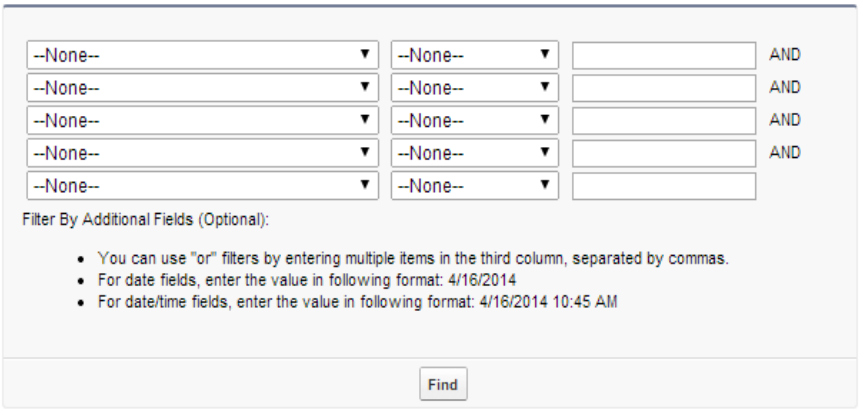
Salesforce users must be added to a Call Center to use the MiVoice Integration for Salesforce. Users must also be configured on the MiVoice Business system that the Call Center is pointed to. Before adding users, make sure that you have a mapping of Salesforce users to Call Centers.

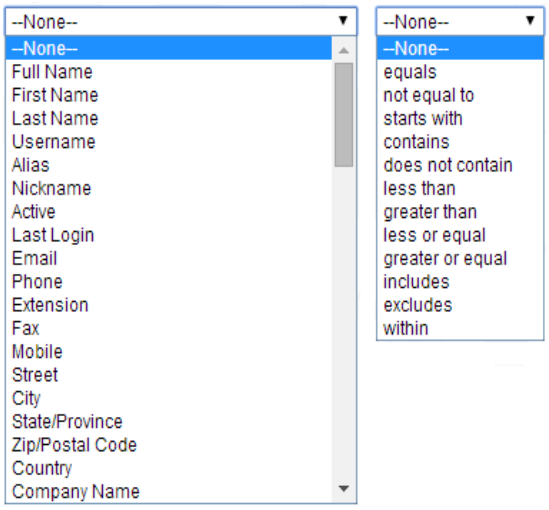
1. If you are already in the view mode of the Call Center, go to step "4".
2. Navigate to the list of Call Center as you did in steps "1" to "4" of "Configure Call Centers" on page 6.
3. Click the name of the Call Center.

   The screen refreshes to display all of the configuration details of the Call Center.
4. Click **Manage Call Center Users**.

   The screen refreshes to display the list of users already added to the Call Center.
5. Click **Add more users**.

   The screen refreshes with a dialog box that has drop down criteria for the search operation.





6. Enter the criteria and values to search for.

   The users must already be configured in Salesforce. Users already added to the Call Center do not appear in the list.

7. Select the users you want to add to the Call Center, and click **Add to Call Center**.

8. Perform new searches and select users until all the users have been added to the Call Center.

9. Confirm that each new user added to the Call Center has the correct phone number and profile type specified in their Salesforce user profile.

Note: Each user must have a phone number entry. Normal practice is to use the MiVoice Business telephone number in the phone number field. MiVoice Integration for Salesforce works only on the prime line of the user.

Create a custom Salesforce user profile

Salesforce user profiles define the privileges and features that Salesforce users can access and use. Salesforce users for the MiVoice Integration must have a custom Salesforce user profile.

Use the instruction is the Salesforce documentation to perform the following steps:

1. Copy an existing Salesforce profile to create a new custom profile (Custom-MiVoice user, for example).
2. Edit the custom profile to allow access to the following MiVoice objects:
   - OIGUserFavorites
3. Save the custom Salesforce user profile.
4. Update the Salesforce users to use the custom profile.

Send instructions to each new user

- "Configuration instructions" on page 17
- "Wrap-up instructions" on page 17

Configuration instructions

Notify each user of the required settings for their MiVoice Integration for Salesforce UI and what the incoming call matching order should be. The matching settings are:

- **ANI Search** - This option matches Salesforce contact records on the caller telephone number. ANI stands for Automatic Number Identification.
  This option can be used both with General Business and MiContact Center licenses.
- **DNIS Search** - This option matches records on the Salesforce Campaign record. DNIS is the Dialed Number Identification Service.
  This option can be used both with General Business and MiContact Center licenses.
- **Collected Digits Search** - This option matches records on the custom data (Collected digits) coming from the MiContact Center IVR system. If the incoming custom data matches an existing record in the Salesforce database, the Case, Account, or Opportunity record, for example, is displayed.
  The default Salesforce record and field to search are defined in the Salesforce XML configuration file. The Collected Digits Search field type is one of "text", "phone", or "number". Refer to the Salesforce documentation for more information.
  This option can be used only with MiContact Center Business licenses.
- **New Contact**: When this option is selected, a **New Contact** page is opened if the caller is not found in Salesforce.

Wrap-up instructions

If you have changed the Wrap Up Actions from their defaults, it is recommended that you include instructions and/or training for the intended use of each of the Wrap Up options users will see.

Configure the user interface for a different language

The language of the MiVoice Integration for Salesforce is set based on the Browser locale. Table 2 lists the supported languages.

Table 2: Supported languages for UI localization

Chinese (Simplified)	Chinese (Traditional)
Danish	Dutch
English	Finnish
French	German
Italian	Japanese
Korean	Norwegian
Portuguese	Russian
Spanish	Swedish
Thai	

Configure Mitel OIG for E.164 dialing support

In the Mitel OIG **Network Elements** tab, the **Custom** setup allows you to configure for E.164 telephone directories. Some national telephone bodies or telephone companies have implemented an Internet-based database for their numbering spaces. E.164 numbers may be used in the Domain Name System (DNS) of the Internet in which the second-level domain e164.arpa has been reserved for telephone number mapping (ENUM).

For detailed instructions, see the *Mitel OIG Installation & Maintenance Guide*.

Upgrade

Upgrading to a new version of the MiVoice Integration for Salesforce does not require re-installation of the product. When new versions are available, a Salesforce App Exchange wizard will guide you through upgrading your MiVoice Integration for Salesforce application. Follow the on-screen steps to complete the upgrade.

A new version of Mitel OIG server may be required to provide new features for MiVoice Integration for Salesforce; the Mitel OIG is part of the overall solution. For example, to get a new feature for MiVoice Integration for Salesforce, only an update of the Mitel OIG software may be required. Refer to the Software Release Notes for each new version of Mitel OIG to determine what is needed.

Note: To see the upgraded version of the application you may need to refresh your session by logging out and then logging back in to your Salesforce administrator account, or in some cases, closing and re-opening the browser before logging in again.

Upgrading to MiVoice Integration for Salesforce Release 2.1

It is recommended not to use screen pop to a new tab in Salesforce Classic View; use the **Screen pop Existing browser window** option instead.

Using the CTI option in Salesforce to screen pop to a new tab creates a second instance of the MiVoice Integration. This could lead to missing or duplicated entries in Salesforce, and a poor user experience. Instead, when training your agents to use the new MiVoice Integration for Salesforce, train the agents to use Salesforce in Console mode.

Console mode is available in the following Salesforce licenses:

- Enterprise, Performance, Unlimited, and Developer editions with Service Cloud.
- Performance and Developer editions with the Sales Cloud.
- Enterprise and Unlimited Editions with the Sales Cloud (extra cost).

Running in Console mode may require additional configuration in Salesforce to optimize the console for ACD agent use. A sample console layout is available through Salesforce for testing.

If you do not wish your agents to use Console mode, users of MiVoice Integration for Salesforce are encouraged to use and run from a single tab in Salesforce Classic View. However, a user does not consume additional licenses if they choose to open MiVoice Integration for Salesforce in multiple tabs.

Troubleshooting tips

The following items are intended to help administrators solve and answer common questions about the user interface and its behavior.

For detailed troubleshooting scenarios and actions, see the *MiVoice Integration for Salesforce Troubleshooting Guide*.

- MiVoice CTI options: When a connected party hangs up while the MiVoice user is creating a consultation call to a third party, the MiVoice user is presented with a disconnect call

option only after the MiVoice user is in a call with the third party. For example, the MiVoice user does not have hold, conference, transfer, and dial pad options.

The agent can get control of the phone again my clicking Clear (Hang up), and then dealing with the call wrap-up as required by your deployment.

- A MiVoice Business SIP trunk must be properly configured for a Mitel OIG application to receive the required call status event data for SIP trunk call scenarios. The **Assert P Header** and **Allow Display Update** must be enabled in SIP peer signaling form.

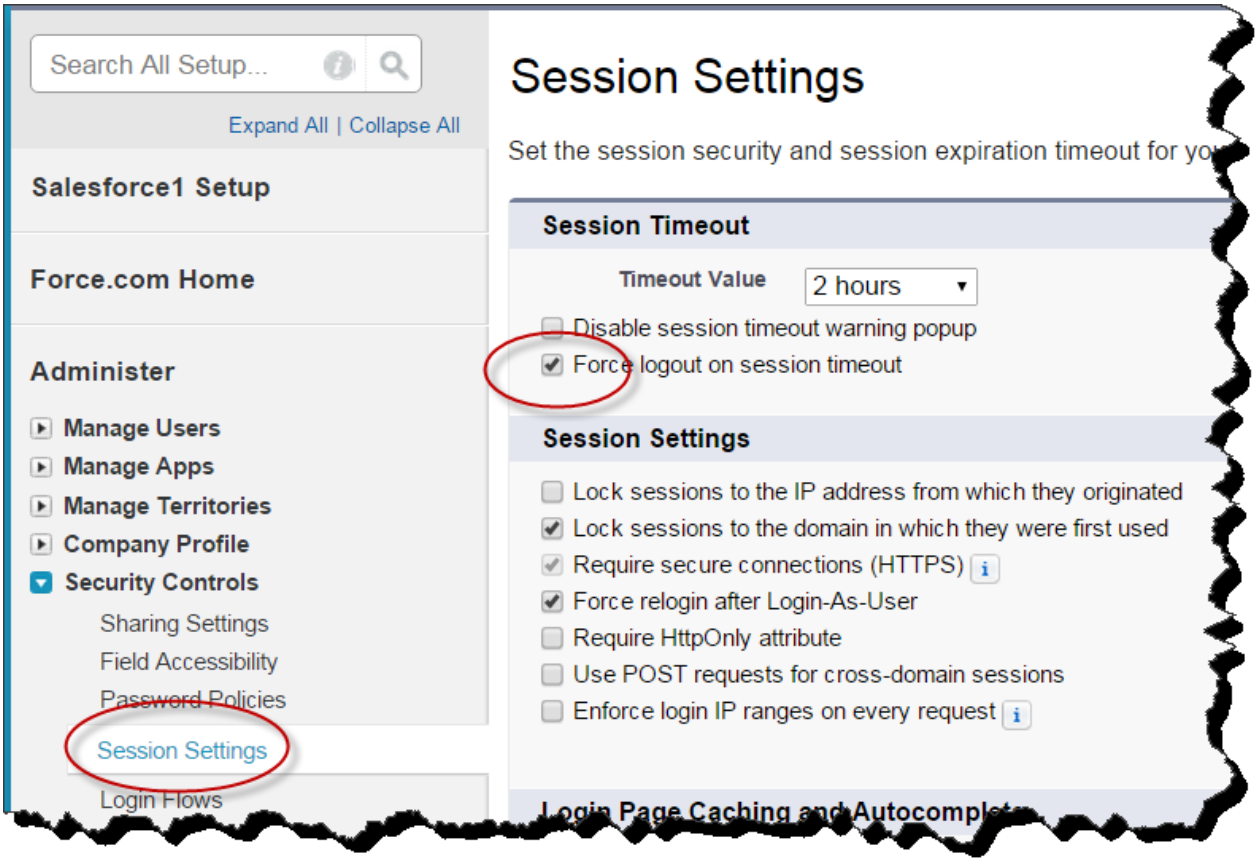
  Refer to the MiVoice Business System Administration Online Help for calling party number configuration details.

- Encourage users to refresh their browser window when the MiVoice client appears not to reflect the current state of the call. Individual user desktop and browser activities can affect the display of the client during use.

- Screen-pop issues: Ensure that MiVoice Integration for Salesforce is configured with the user's prime line, and not with secondary lines, Personal Ring Groups, or line appearances. Also ensure that pop-ups are enabled.

  Microsoft Internet Explorer does not support web browser call notification in the bottom left corner of the monitor for the web browser; Google Chrome web browser does support call notification display.

- If the agent has been inactive for a time, and the MiVoice Integration for Salesforce UI appears to not be working properly when the agent returns to work, check that the Salesforce timeout setting: **Force logout on session timeout** is enabled. This setting is enabled by default.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Manage Territories
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Security Controls
Sharing Settings
Field Accessibility
Password Policies
Session Settings
Login Flows
Session Settings
Set the session security and session expiration timeout for yo
Session Timeout
Timeout Value
2 hours
Disable session timeout warning popup
Force logout on session timeout
Session Settings
Lock sessions to the IP address from which they originated
Lock sessions to the domain in which they were first used
Require secure connections (HTTPS)
Force relogin after Login-As-User
Require HttpOnly attribute
Use POST requests for cross-domain sessions
Enforce login IP ranges on every request