MiVoice Integration for Salesforce Troubleshooting Guide

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RELEASE 2.6

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This guide provides troubleshooting information for configuring your Salesforce system to support the MiVoice Integration for Salesforce.

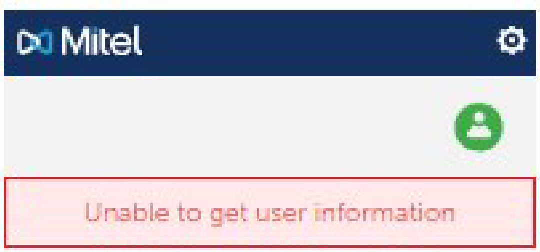
Note: MiVoice Integration for Salesforce is supported for use with Salesforce Classic and Salesforce Lightning Experience. For information about configuring MiVoice Integration for Salesforce, see the *MiVoice Integration for Salesforce Administration Guide*.

User Issues

Unable to Get User Information

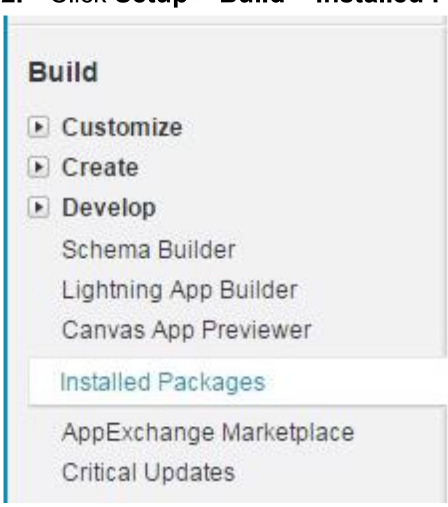
Symptom

The MiVoice Integration is unable to find and display user information.

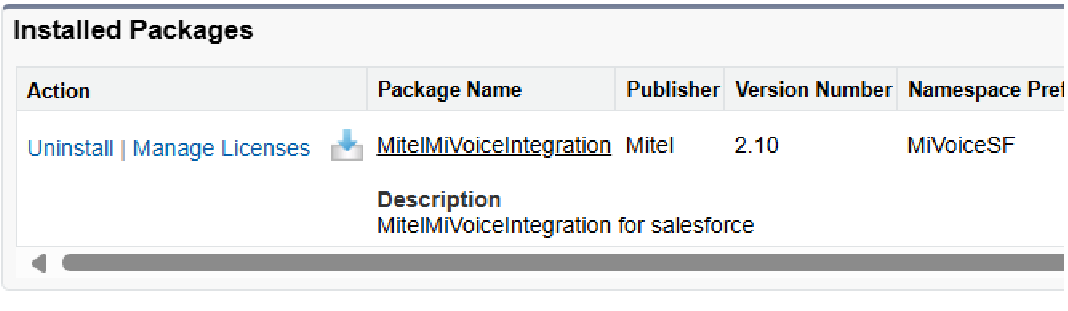


Corrective Action

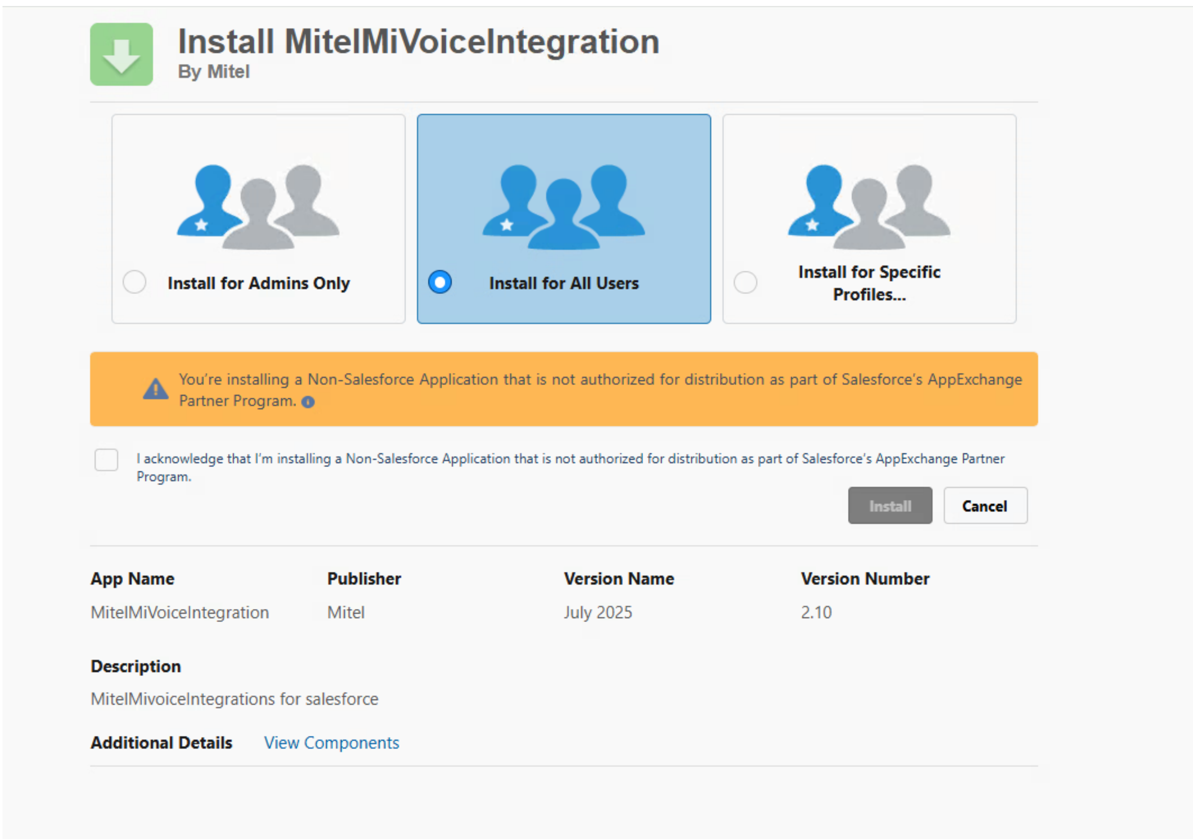
1. Log in as Salesforce Administrator.
2. Click **Setup > Build > Installed Packages**.



3. Check that MiVoice Integration version number **2.10** is listed in the Installed Packages section:

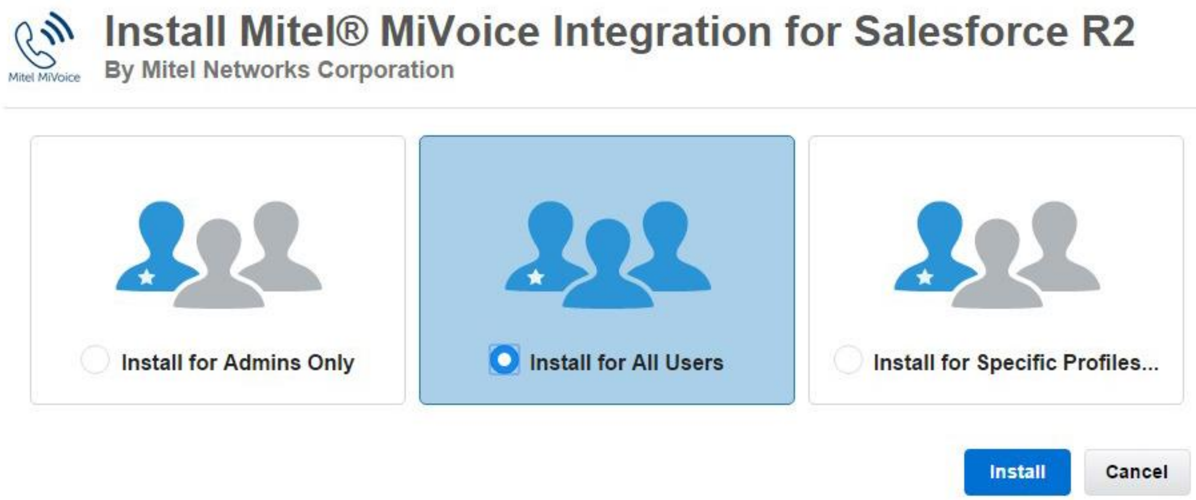


4. If MitelMiVoiceIntegration 2.10 is **not** listed, visit the URL:
https://login.salesforce.com/packaging/installPackage.apexp?p0=04tgK00000049vx

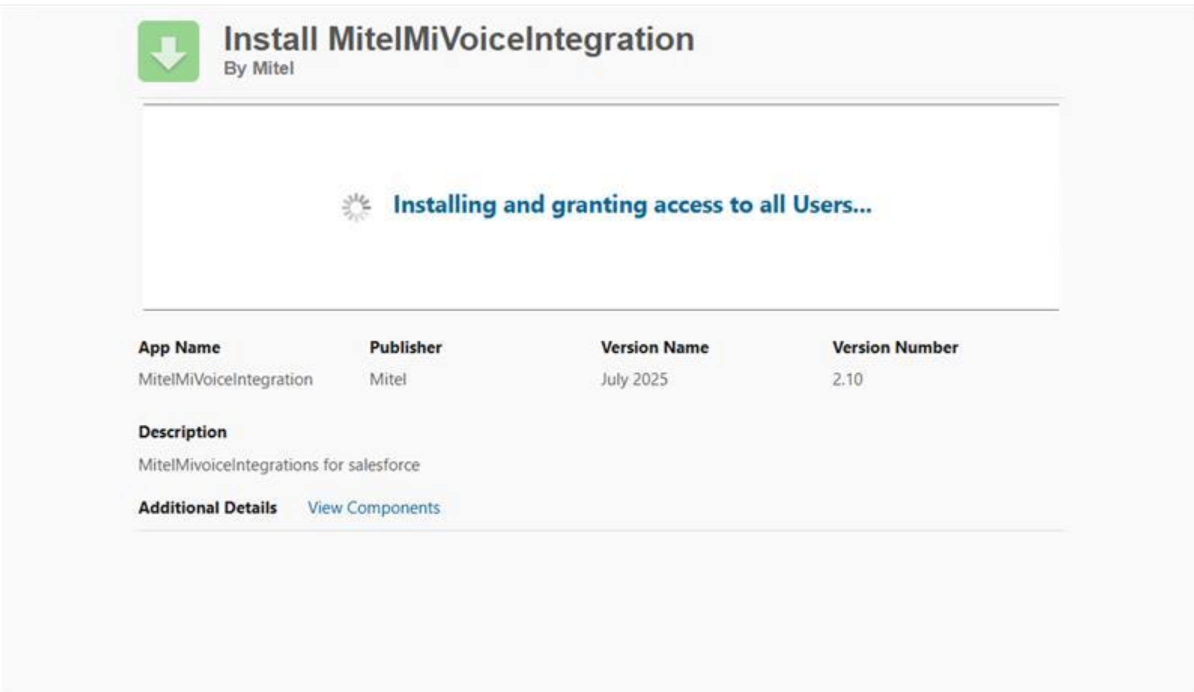


5. Click **Install for All Users** and then click **Install.**

.



6. The application is installed.



7. Refer to the ***MiVoice Integration for Salesforce Administration Guide*** for instructions to set up a call center for users.

8. Back on the **Home** tab, reload the MiVoice Integration plug-in.

9. To allow access for the MiVoice Integration for Salesforce apex classes in Customized Profiles, ensure that MiVoiceSF apex classes are enabled for the profile. This can be done by following below mentioned steps:

1. From Setup, enter **Profiles** in the Quick Find box, then select **Profiles**.
2. Select the profile.
3. In the **Enabled Apex Class Access** section, click **Edit**.

4. Select the Apex classes that you want to enable from the **Available Apex Classes** list and click **Add** or select the Apex classes that you want to disable from the Enabled Apex Classes list and click **Remove**.

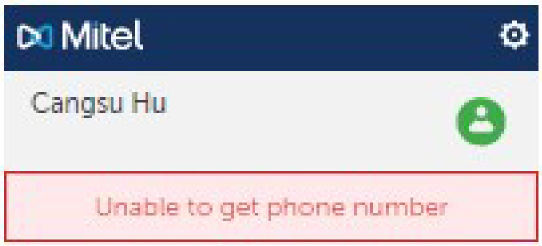
Note: It is recommended to have all the available MiVoiceSF apex classes enabled in profile to make full use of MiVoice integration for Salesforce.

5. Click **Save**.

Unable to Get Phone Number

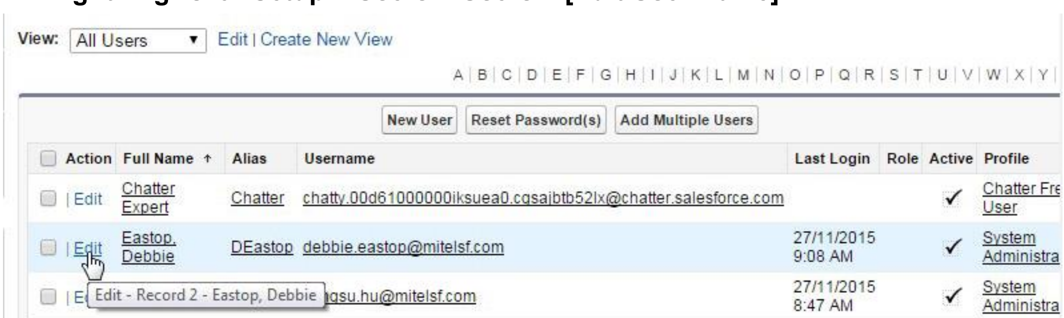
Symptom

The MiVoice integration is unable to get a user phone number.

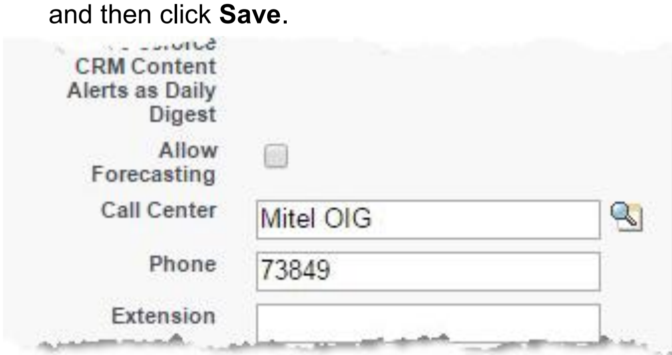


Corrective Action

1. Log in as Salesforce Administrator.
2. **Classic:** Click **Setup > Administer > Manage Users > Users > Edit the user**.
   Lightning: Click **Setup > Users > Users > [Edit User Name]**.



3. Check the **Phone** and **Extension** fields. If they are blank, input a Phone number or Extension number and then click **Save**.



Access Issues - Create a Custom Salesforce User Profile

Symptom

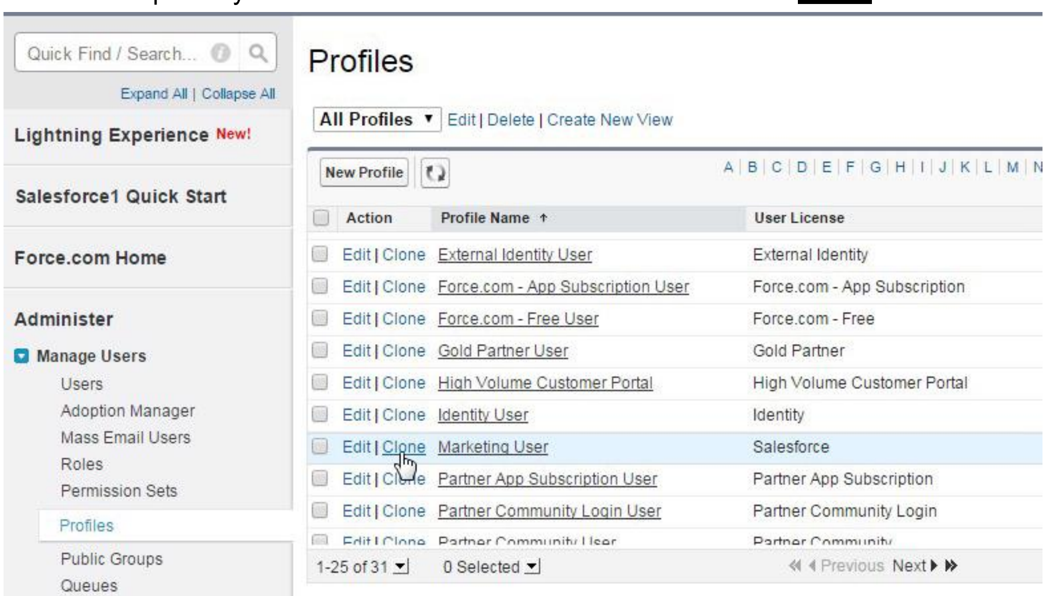
If users are experiencing limited access to the MiVoice Integration, it may be due to the permissions set in their User Profile. Profiles define how users access objects and data, and what they can do within the application. Custom profiles allow you to edit permissions and settings to allow access to the MiVoice Integration.

> **Note:** Users configured on a Salesforce Classic Call Center can only use MiVoice Integration for Salesforce in Classic mode. Users configured on a Salesforce Lightning Experience Call Center can use MiVoice Integration for Salesforce in either Classic mode or Lightning Experience mode.

Corrective Action

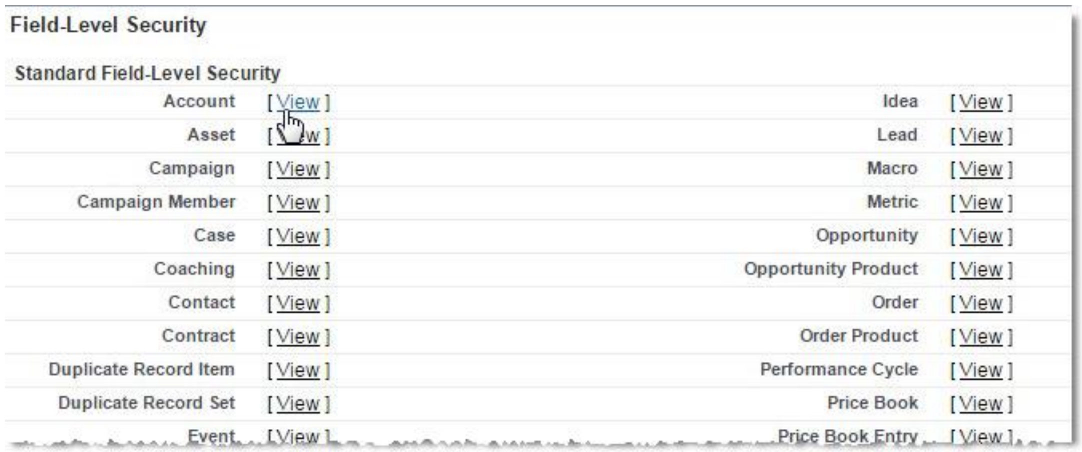
Clone a custom profile from an existing profile.

1. Log in as Salesforce Administrator.
2. **Classic:** Click **Setup > Administrator > Manage Users > Profiles**.
   Lightning: Click **Setup > Users > Profiles > [Edit Profile Name]**.
3. Find the profile you want to clone and then click the associated **<u>Clone</u>** link.

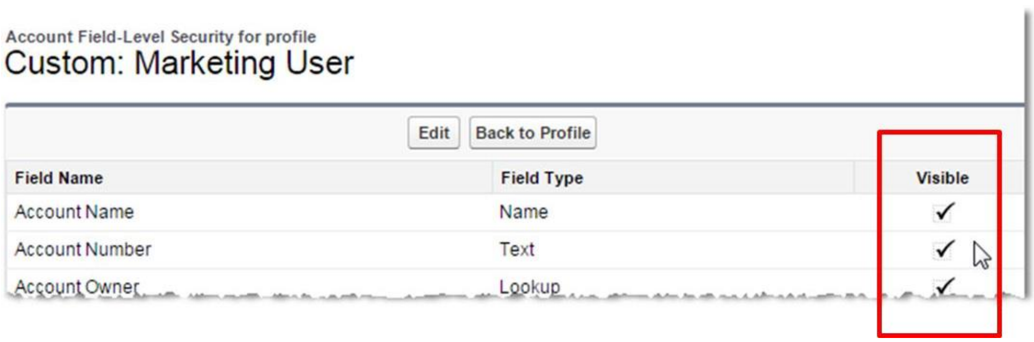


4. Enter a **name** for the custom profile and then click **Save**.

5. Scroll down to the Field Level Security section and click the <u>View</u> link beside **Account**.



6. Make sure that the **Account Number**, **Account Name**, and **Phone** fields have a check mark under "Visible". If they do not, click **Edit** and make them visible.



7. Go back to the Field Level Security page make sure the following fields are visible:

[VIEW LINK]	FIELDS TO MAKE VISIBLE:		
Campaign [View]	Campaign Name	Text	✓
	DNIS	Phone	✓
Case [View]	Case Number	Auto Number	✓
	\		
	Subject	Text	✓
Contact [View]	Account Name	Lookup	✓
	Home Phone	Phone	✓
	Mobile	Phone	✓
	Name	Name	✓
	Phone	Phone	✓
Lead [View]	Company	Text	✓
	Name	Name	✓
	Phone	Phone	✓
Opportunity [View]	Opportunity Name	Text	✓
Task [View]	Make all visible.		

8. Go back to the Field Level Security page, under Custom Field-Level Security, click the <u>View</u> link beside **OIGUserFavorite**

Field Name	Field Type	Visible
Contact	Lookup	✓
Created By	Lookup	✓
Last Modified By	Lookup	✓
OIGUserFavorite Name	Text	✓
User	Lookup	✓

9. Go back to the Field Level Security page and scroll down to **Standard Object Permissions** and make sure the following fields are selected as shown:

Standard Object Permissions

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Accounts	✓	✓	✓	✓			Goals						
Assets	✓	✓	✓	✓			Goal Links						
Campaigns	✓	✓	✓	✓			Ideas	✓	✓				
Cases	✓	✓	✓				Leads	✓	✓	✓	✓		
Coaching							Macros						
Contacts	✓	✓	✓	✓			Metrics						
Contracts	✓	✓	✓	✓			Metric Data Links						
D&B Companies	✓						Opportunities	✓	✓	✓	✓		

10. Scroll back to the top and click **Edit** and **Save**.

11. On the Profile page, click **Edit** and scroll down to Custom Object Permissions. Ensure that **all** access is set for OIGUserFavorites and then click **Save**.

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
OIGUserFavorites	✓	✓	✓	✓	✓	✓

12. To associate the user with the new profile, click **Setup > Administer > Manage users > Users**.

13. Select the user and click **Edit**.

14. Set the **Profile** field to the new custom profile.

Role	
User License	Salesforce
Profile	Custom: Marketing User
Active	✓

Access Control for Professional Edition

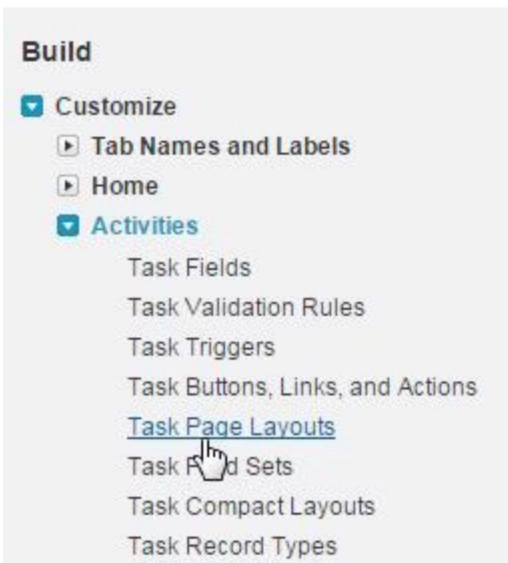
Symptom

Professional Editions of Salesforce do not support the concept of Custom Profiles or Field Level Security. As a result, Field Level Security is handled by the page layout for each object. The fields that are required for the MiVoice Integration must be added to the page layouts.

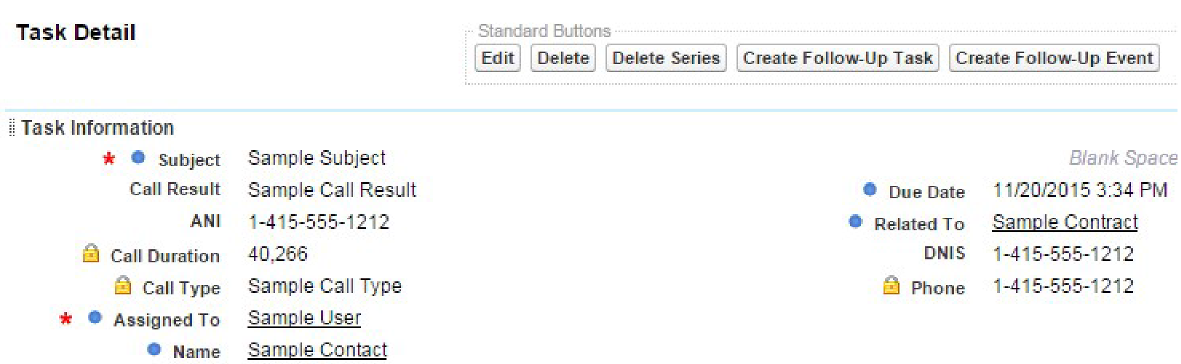
Corrective Action

Task Page Layouts

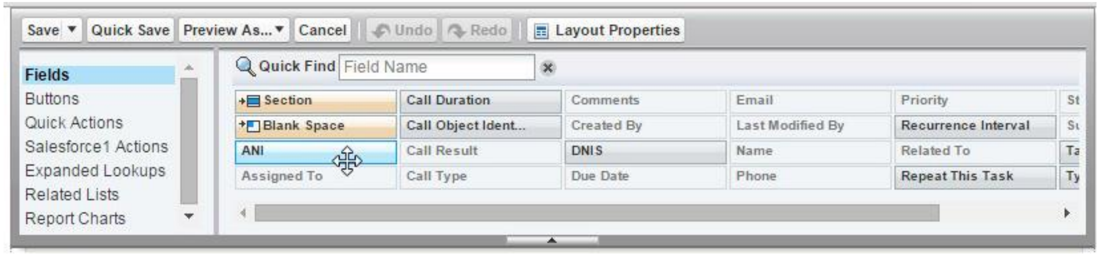
1. Log in as Administrator.
2. **Classic:** Click **Setup > Build > Customize > Activities > Task Page Layouts**.
   Lightning: Click **Setup > Object Manager > Task > Page Layouts > [Edit Task Layout Name]**.



3. On the Task Page Layouts page, click **Edit**. Scroll down to the Task Details section and make sure that the fields are listed as follows (Note: the order of appearance of the fields is not important.)



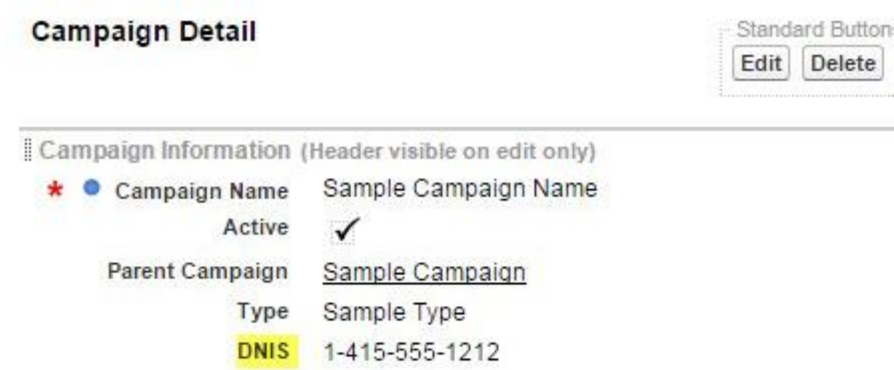
4. If any of these fields are missing, select them in the **Task Layout** overlay. (Scroll to the top of the page if you cannot see the overlay.)



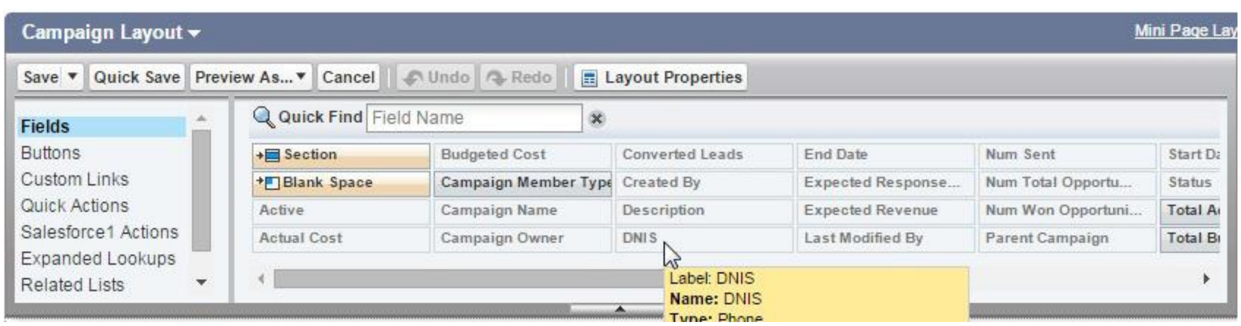
5. Drag any missing field names from Task Layout to the Task Detail section and then click **Save**.

Campaigns Page Layouts

1. **Classic:** While still logged in as Administrator, click **Setup > Build > Customize > Campaigns > Page Layouts** and then click Edit.
   Lightning: Click **Setup > Object Manager > Campaign > Page Layouts > [Edit Campaign Layout Name]**.
2. Scroll down to the Campaign Details section and make sure that the fields are listed as follows:



3. If the **DNIS** field is not shown, drag it from Campaign Layout box to the Campaign Detail section and then click **Save**.



Note: If the DNIS field does not appear in the Task Layout, then you will need to create it. See *Add a custom field for DNIS search* on page 22 for instructions.

Leads Page Layout

1. **Classic:** While still logged in as Administrator, click **Setup > Build > Customize > Leads > Page Layout** and click <u>Edit</u>.
   Lightning: Click **Setup > Object Manager > Lead >Page Layouts > [Edit Lead Layout Name]**.
2. Scroll down to the Lead Detail section and make sure that **Phone** and **Mobile** fields are listed.

3. If any of these fields are missing, select them in the **Lead Layout** overlay. (Scroll to the top of the page if you cannot see the overlay.)

4. Drag any missing field names from Lead Layout to the Lead Detail section and then click **Save**.

Accounts Page Layout

1. **Classic:** While still logged in as Administrator, click **Setup > Build > Customize > Accounts > Page Layout** and then click <u>Edit</u>.
   Lightning: Click **Setup > Object Manager > Account > Page Layouts > [Edit Account Layout Name]**.
2. Scroll down to the Account Detail section and make sure that the **Phone** field is listed.

3. If the Phone field is missing, select it in the **Account Layout** overlay. (Scroll to the top of the page if you cannot see the overlay.)

4. Drag the missing field name from Account Layout to the Account Detail section and then click **Save**.

Contacts Page Layout

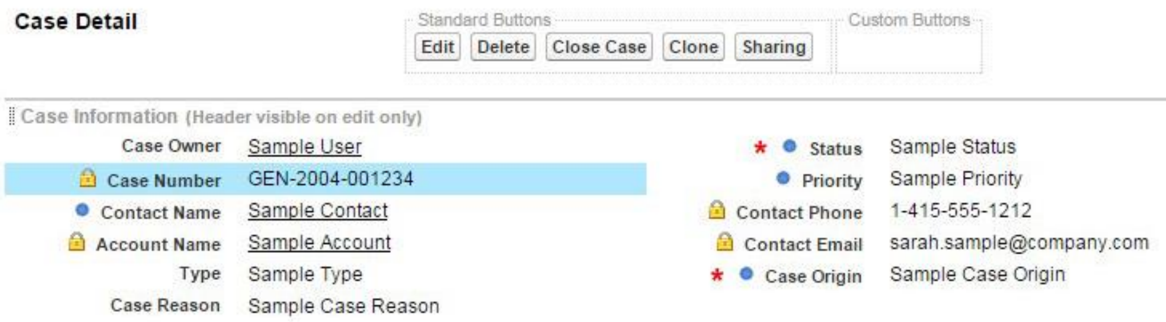
1. **Classic:** While still logged in as Administrator, click **Setup > Build > Customize > Contacts > Page Layouts** and then click Edit.
   Lightning: Click **Setup > Object Manager > Contact > Page Layouts > [Edit Contact Layout Name]**.
2. Scroll down to the Contact Detail section and make sure that the **Phone, Mobile, and Home Phone** fields are listed.

3. If any of these fields are missing, select them in the **Contacts Layout** overlay. (Scroll to the top of the page if you cannot see the overlay.)

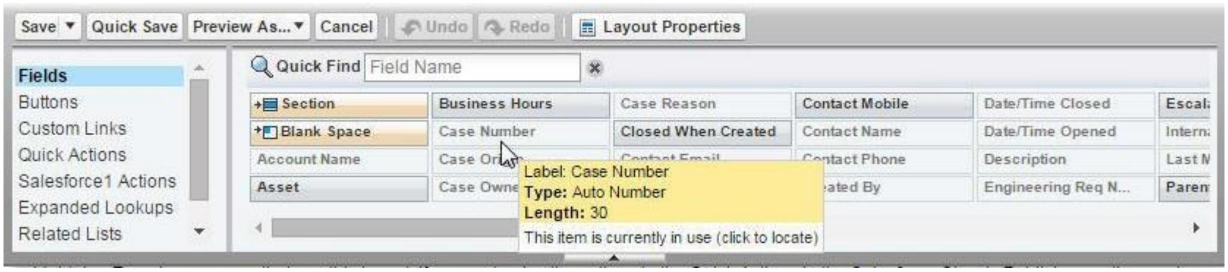
4. Drag any missing field names from Contacts Layout to the Contacts Detail section and then click **Save**.

Case Page Layout

1. **Classic:** While still logged in as Administrator, click **Setup > Build > Customize > Cases > Page Layout and then click Edit.**
   Lightning: Click **Setup > Object Manager > Case > Page Layouts > [Edit Case Layout Name]**.
2. Scroll down to the Case Detail section and make sure that the **Case Number** field is listed:



3. If the field is missing, select it in the **Case Layout** overlay. (Scroll to the top of the page if you cannot see the overlay.)



4. Drag the missing field name from Case Layout to the Case Detail section and then click **Save**.

MiVoice Integration Unresponsive after session times out

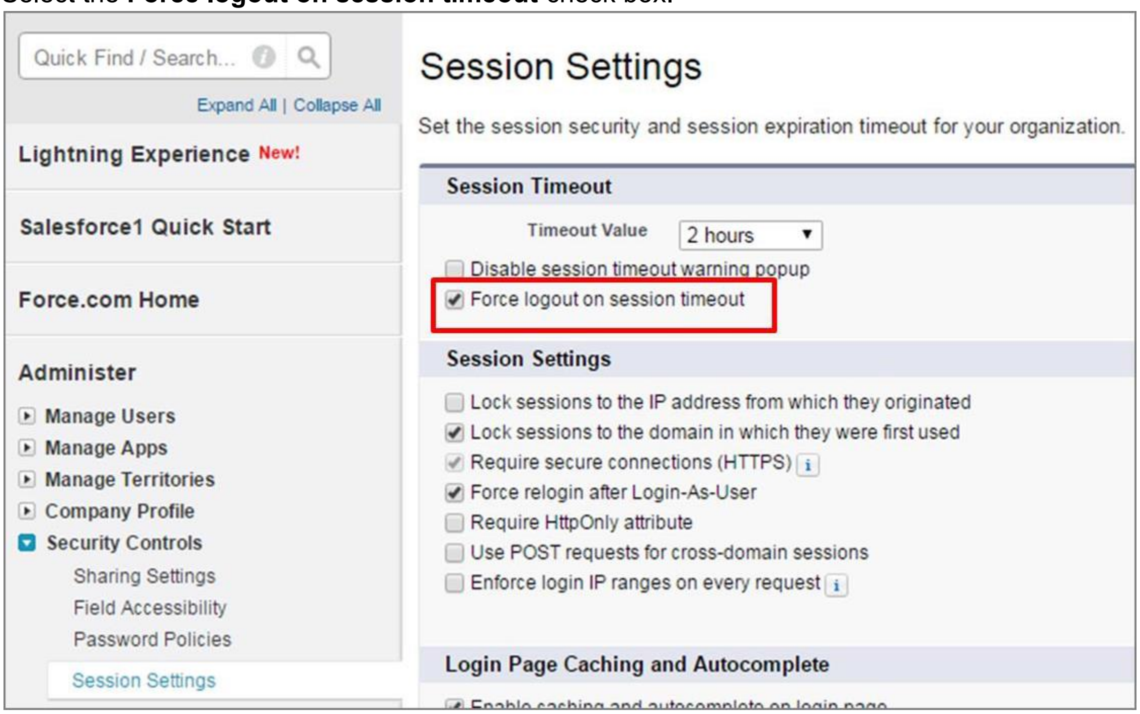
Symptom

The MiVoice Integration does not respond after the Salesforce session times out.

Corrective Action

You can configure Salesforce to log out automatically when a session times out.

1. Log in as Administrator.
2. **Classic:** Click **Setup > Administer > Security Controls > Session Settings**.
   Lightning: Click **Setup > Security > Session Settings**.
3. Select the **Force logout on session timeout** check box.



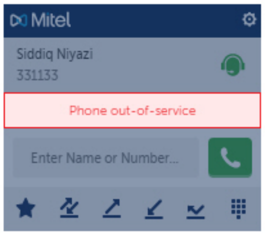
Phone Out of Service with MiCollab ACD SIP Softphone user

Symptom

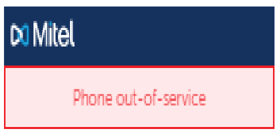
Screen displays the "Phone out-of-service" error message.

Corrective Action

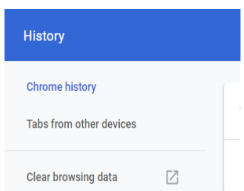
- If the “Phone out-of-service” error message appears as shown in the following figure, then the MiCollab ACD SIP Softphone is not up and running. Examine the MiCollab configuration and ensure that the phone is in the available state.



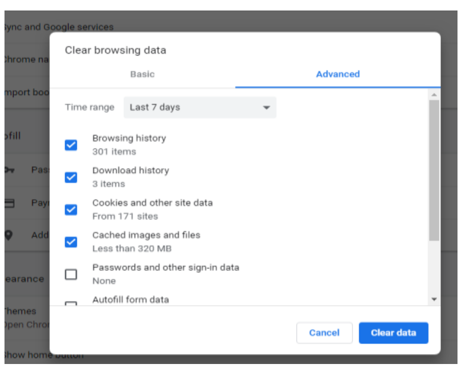
- If the “Phone out-of-service” error message appears as shown in the following figure, it indicates that the MiCollab ACD SIP Softphone user clicked the **Hot Desk** button instead of the **Softphone** button. To resolve this issue, clear the browser cache.



1. Log in to the **Salesforce** user account.
2. Open **History** from the browser settings.



3. Click **clear browsing data** and clear the cache.



Display Issues

Disable Screen Pop-up in New Window or Tab

Symptom

Screen pops open in new browser window or tab, rather than within the existing window/tab.

Corrective Action

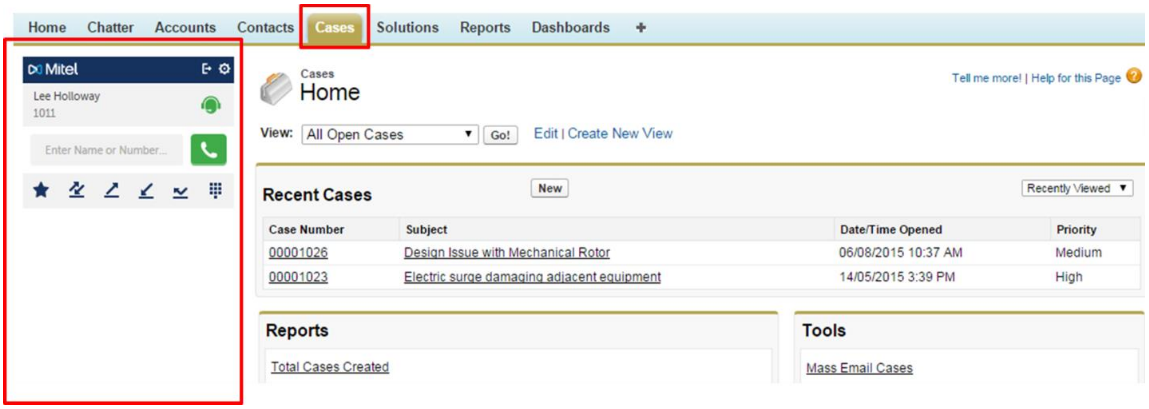
1. Log in as Administrator.
2. **Classic:** Click **Setup > Build > Customize > Call Center > Softphone Layouts** and then click Edit.
   Lightning: Click **Setup > Feature Settings > Service > Call Center > Softphone Layouts > [Edit Softphone Layout Name]**.
3. In the Softphone layout, under Screen Pop Settings, select **Existing browser window**.

Note: Opening MiVoice Integration for Salesforce in multiple browser tabs in Classic Mode does not consume multiple user licenses; however, this is not recommended as it can result in unpredictable application behavior, (missing or duplicate contact updates, for example). 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.
If multiple concurrent MiVoice Integration for Salesforce tabs are required, Console Mode is recommended.

Enable the Sidebar for the Cases Screen

Symptom

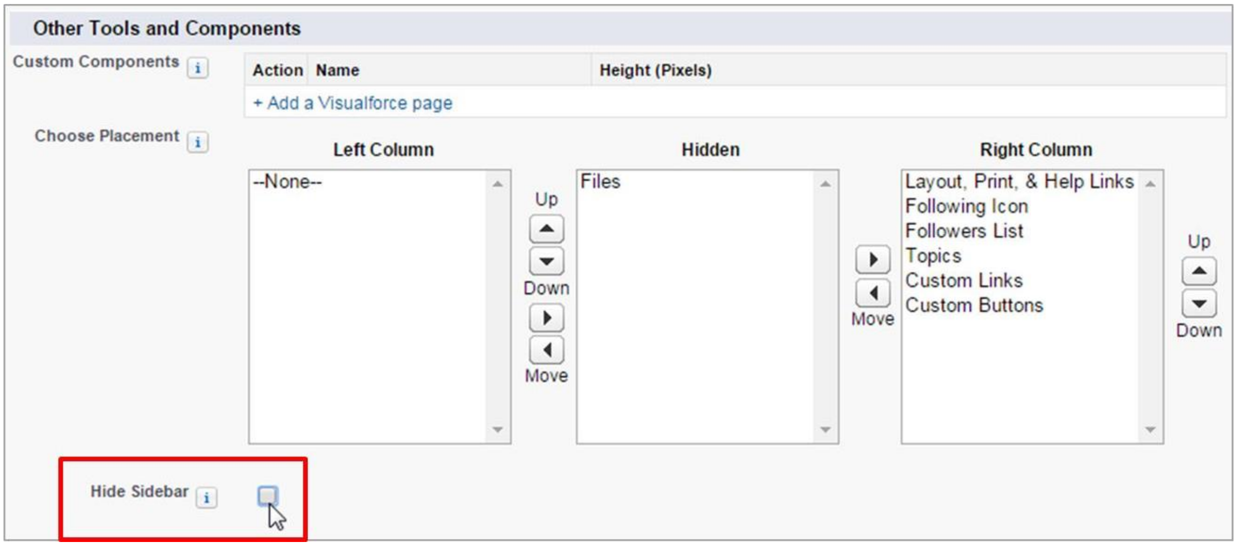
The MiVoice Integration application is not visible in the Cases screen.



Corrective Action

1. Log in as Administrator.
2. **Classic:** Click **Setup > Build > Customize > Cases > Page Layouts** and then click Edit.
   Lightning: Click **Setup > Object Manager > Case > Page Layouts > [Edit Case Layout Name]**.
3. In the Case Layout section, click Feed View.

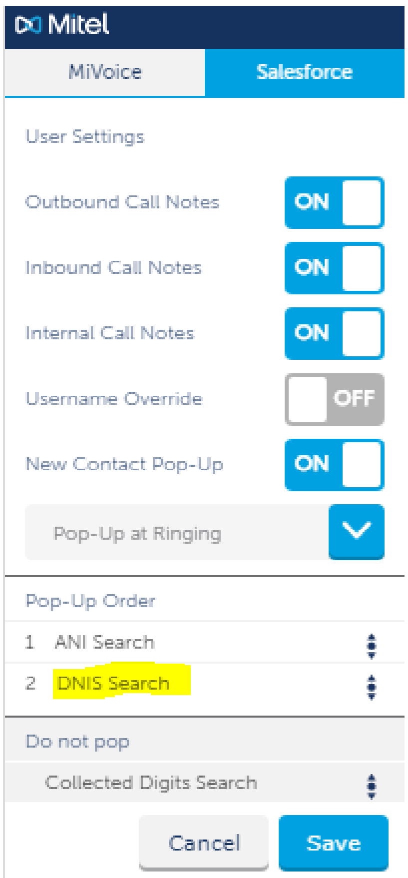
4. Scroll down to **Other Tools and Components** and clear the **Hide Sidebar** check box:



Add a Custom Field for DNIS Search

Symptom

DNIS Search option does not pop Campaign pages.

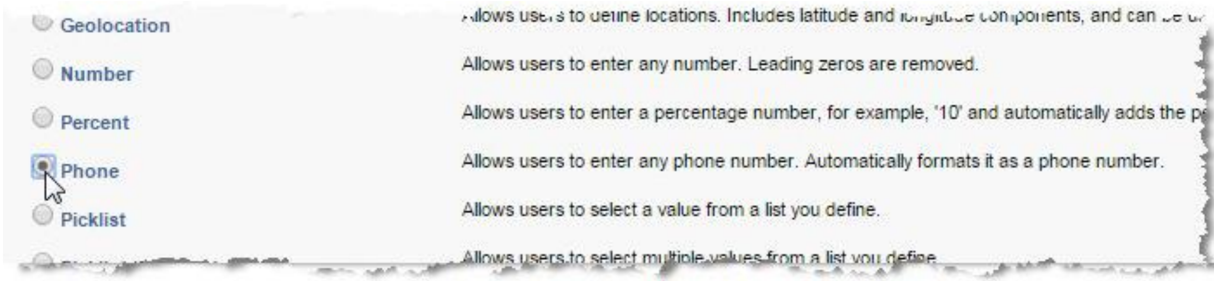


Corrective Action

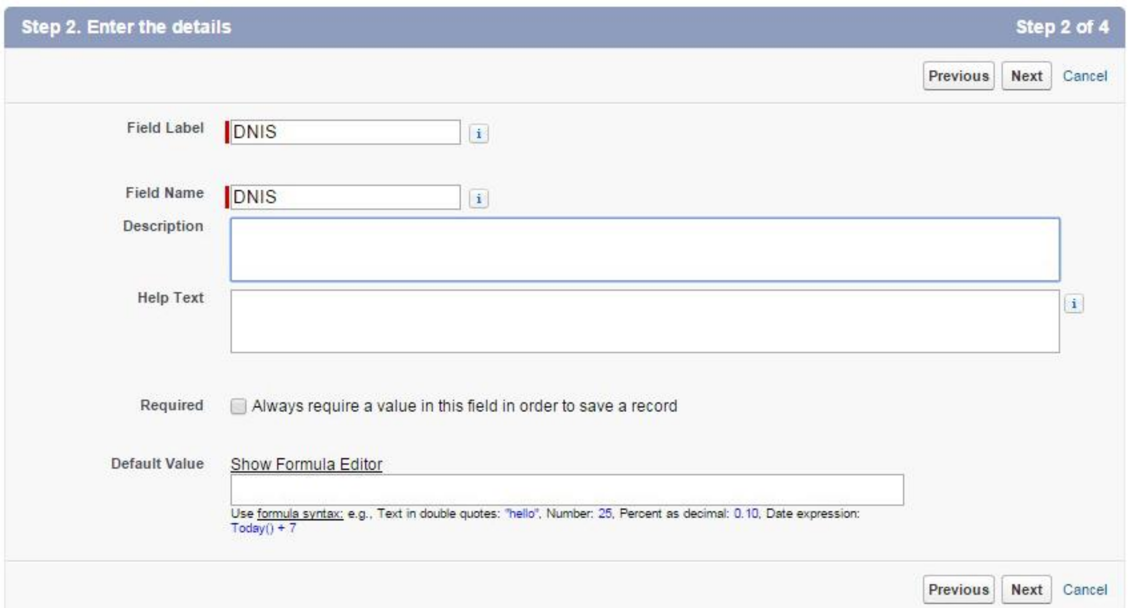
This issue occurs when the MiVoice Integration does not receive enough information to match the digits dialed to the campaign because the DNIS field is missing from the Campaign page layout.

1. Log in as Administrator.
2. **Classic:** Click **Setup > Customize > Campaigns > Fields**.
   Lightning: Click **Setup > Object Manager > Campaign > Fields & Relationships > New**.
3. Scroll down to **Campaign Custom Fields and Relationships** and then click **New**.

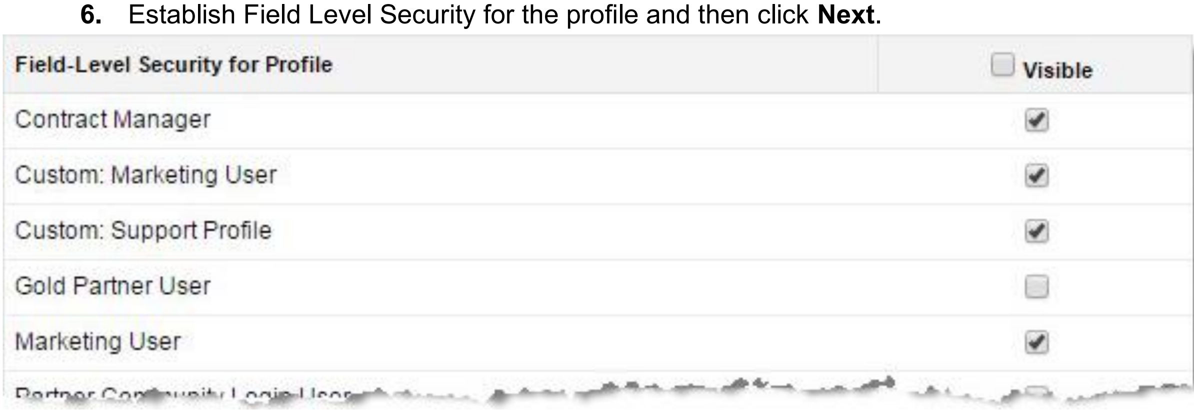
4. Scroll down and select **Phone** and then click **Next**.



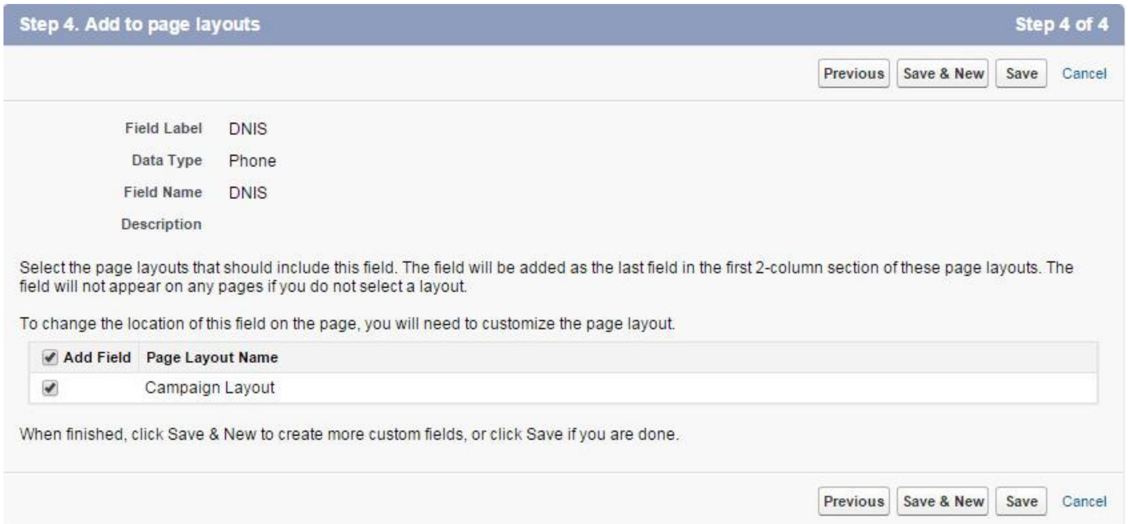
5. Enter DNIS as **Field Label** and **Field Name** and then click **Next**.



6. Establish Field Level Security for the profile and then click **Next**.



7. Select the Page Layouts that should include this field (in this case, the Campaign page), and then click **Save**.



8. On the **Campaigns > Page Layout** page, drag the DNIS field from the Campaign Layout box into the Campaign Detail section.