# Phone Manager
# Application Support - SalesForce

DECEMBER 2016

DOCUMENT RELEASE 5.0

APPLICATION SUPPORT

Mitel

Mitel Phone Manager
Release 5.0 - December, 2016

# SalesForce

## Overview

This describes the features that are available when integrating with SalesForce.

## Supported Versions

The following SalesForce versions are supported.

| **Edition** | **Supported** |
|---|---|
| Contact Manager | ✗ |
| Group | ✗ |
| Professional | ✓ £ |
| Enterprise | ✓ |
| Performance | ✓ |

£ - Additional SalesForce fees may apply

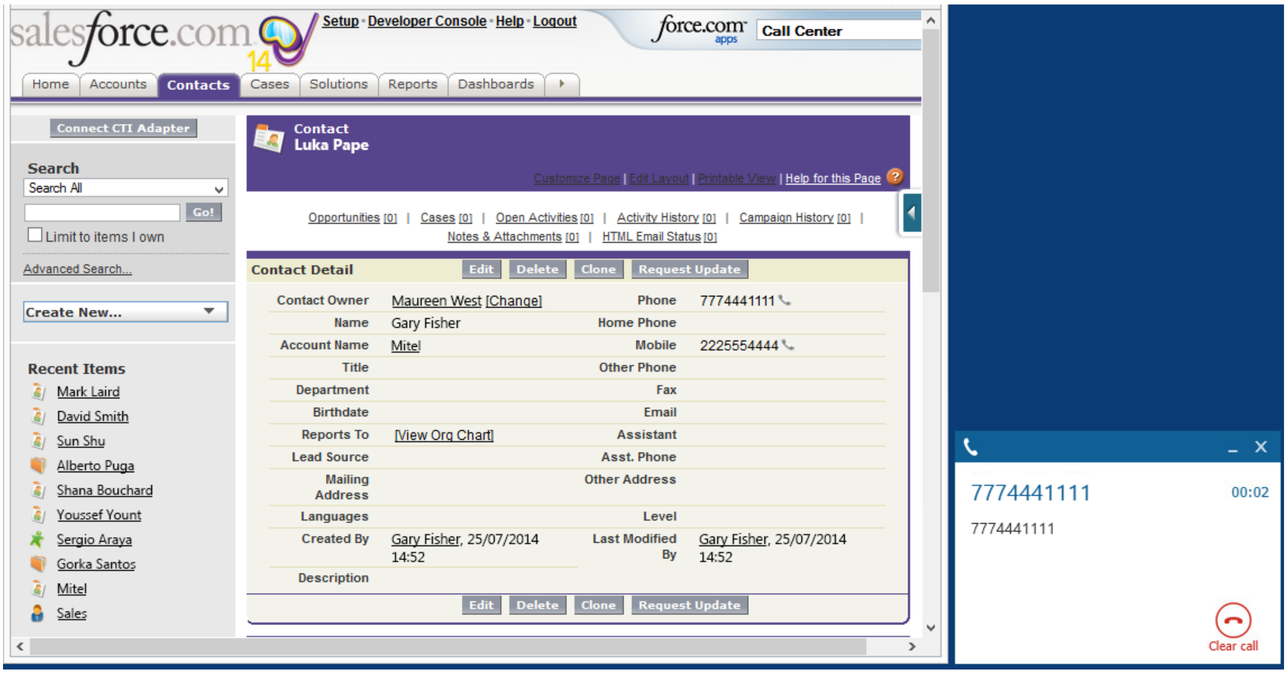
## Features

Integration with SalesForce supports the features listed below:

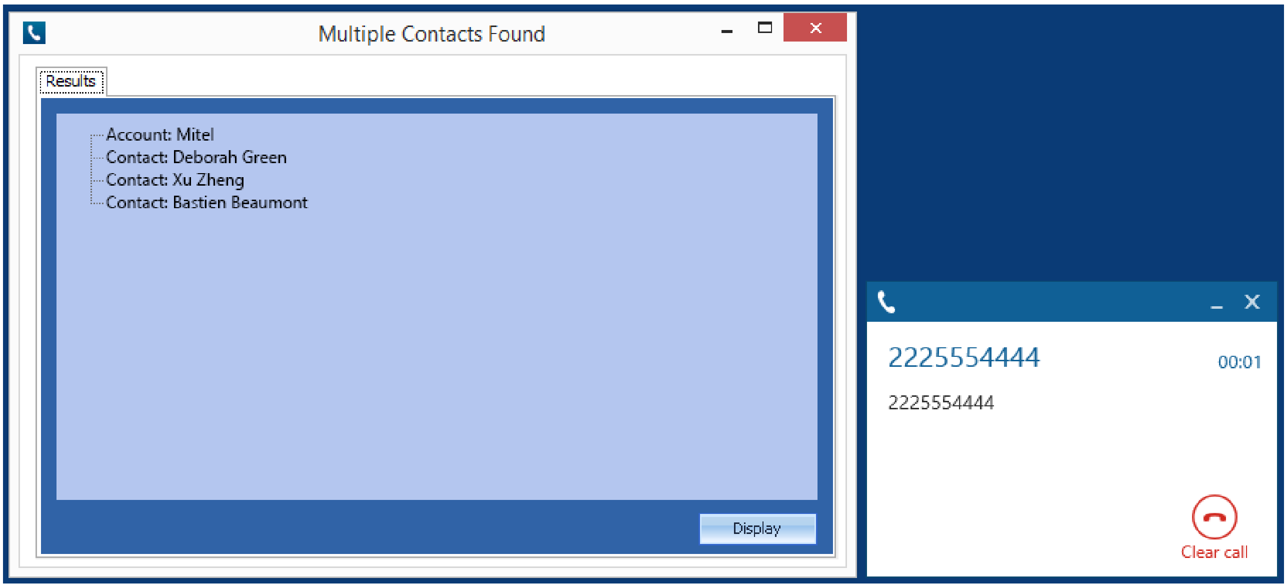
- Screen pop for contacts
- Automatic call history entry

### Screen pop

CRM *Contact*, *Account* and/or *Lead* entities can be screen popped directly within SalesForce when an incoming call is received using the caller id or from an outgoing call using the dialed number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* entity was found and the record was automatically displayed using the Users default browser.



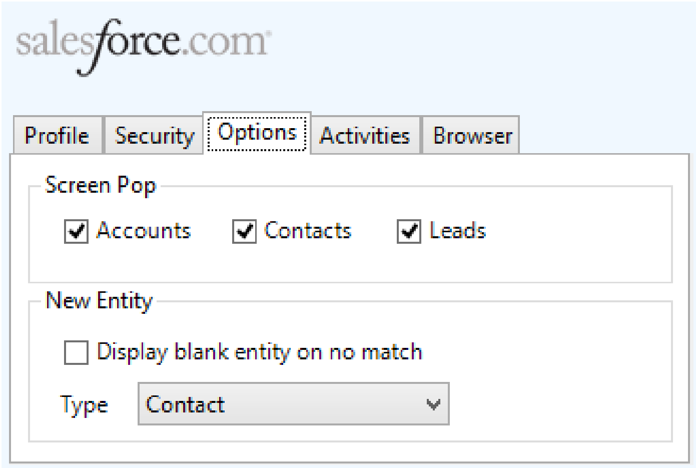

If multiple matches are found then the *Multiple Contacts Found* window is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found one matching *Account* entity and three matching *Contact* entities that have this telephone number.




The correct entity can then be highlighted and then clicking on the *Display* button will open this record.

### *Entity and matching options*

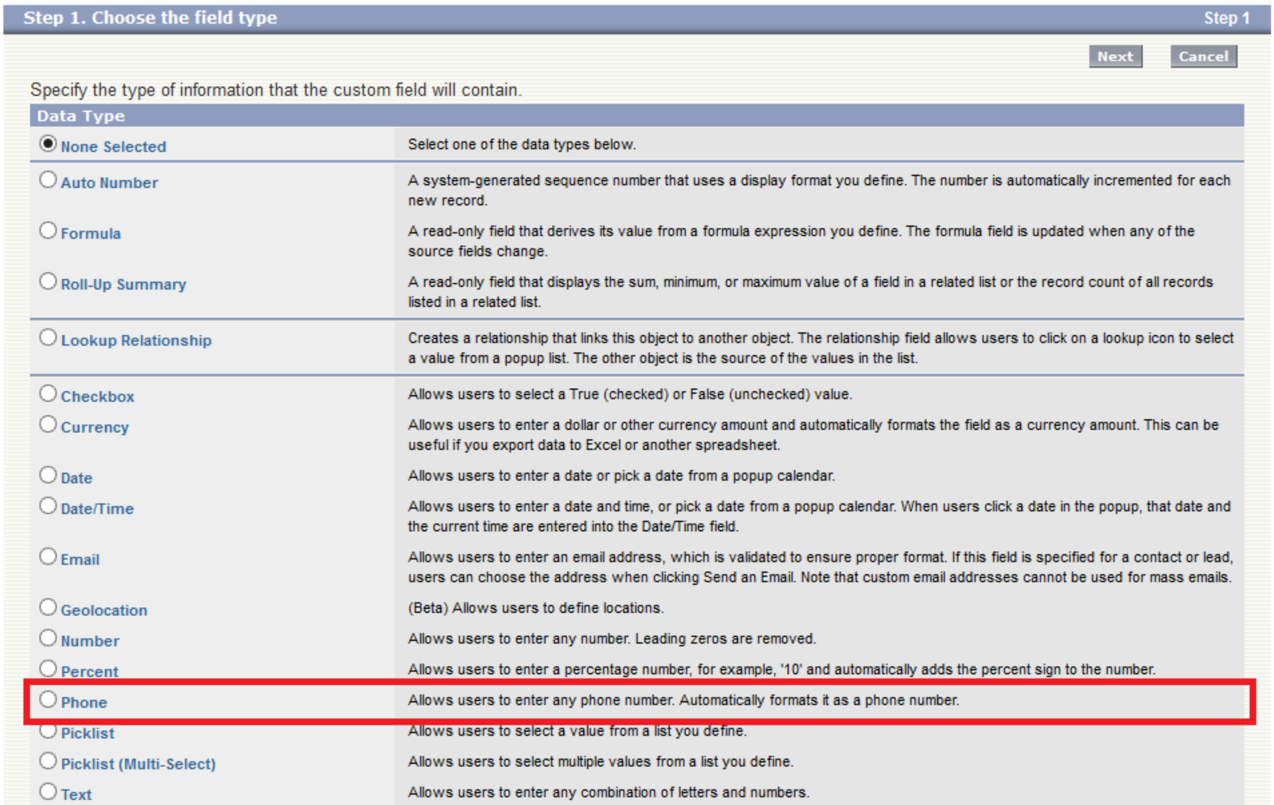
Configuration options are available on the plugin that allow the type of *Entities* to be used in the searching to be set. For example it can be configured so that only the *Contact* entities are searched. These options are set on the *Options* tab




If no match is found when searching for an Entity than a blank form can be automatically displayed to create a New Entity. The Type of Entity, *Contact*, *Account* or *Lead* that is created can be set here.

### *Search fields*

The range of telephone numbers that are to be searched are not configurable. All SalesForce fields that are have the *phone* type will be used.

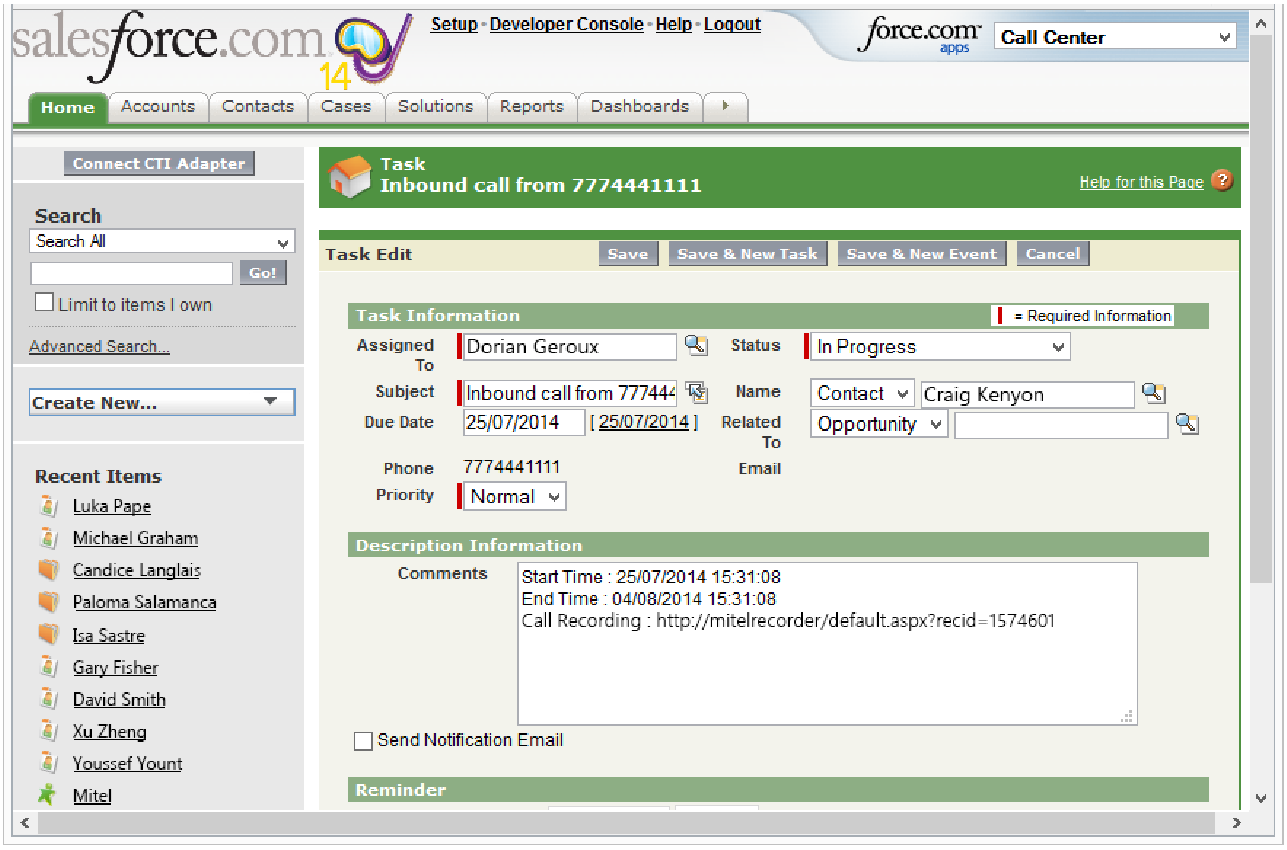



The format of the telephone number does not make any difference as any type of format is supported. The number dialled/received is used for the searching.

### *Automatic call history entry*

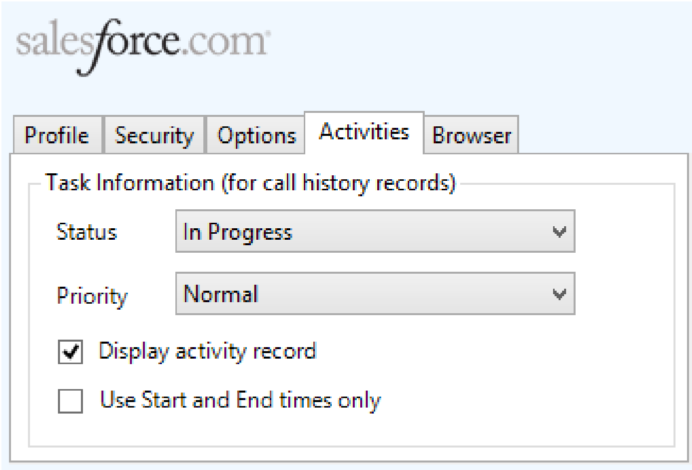
The plugin supports the ability to be able to automatically create and display a SalesForce Phone Task entity. The Entity to associate this with is found using the caller id received or the number dialed, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the screen popping. The telephone numbers used to search are set in the screen popping section.

The Activity record is automatically created with the information relating to the call entered into the *Comments* field and the related entities are linked as shown.




| | |
|---|---|
| **Phone number** | For inbound calls this is the caller ID and for outbound calls this is the dialed number. |
| **DDI/DID** | For external inbound calls only, the DDI/DID number that the call came in on. |
| **DDI/DID Name** | For external inbound calls only, the DNIS of the DDI/DID that the call came in on. |
| **Direction** | The direction of the call. |
| **Account Code** | The account codes that was set on the call. |
| **Trunk** | For external calls the outside network trunk number that the call was made or receivec |
| **Transferring Extension** | The device that the call was transferred from. |
| **Duration** | The duration of the call. The call event trigger must have been set to Call End as they not known until the call is cleared. |
| **Call Recording** | If integrating with a Xarios Call Recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browsei The call event trigger must have been set to at least Call Answered as the call recorde only create the recording id when the call has been answered. |

The plugin configuration has several options that can be set to determine how the record is created.




**Status**: This allows the type of *Status* for the task to be configured. Valid options are: *Not Started*, *In Progress*, *Completed*, *Waiting on someone else*, *Deferred*.

**Priority**: This will set the priority of the Task to be *High*, *Normal* or *Low*.

**Display activity record**: If this is set then the Task will be displayed when it's created in a new browser window.

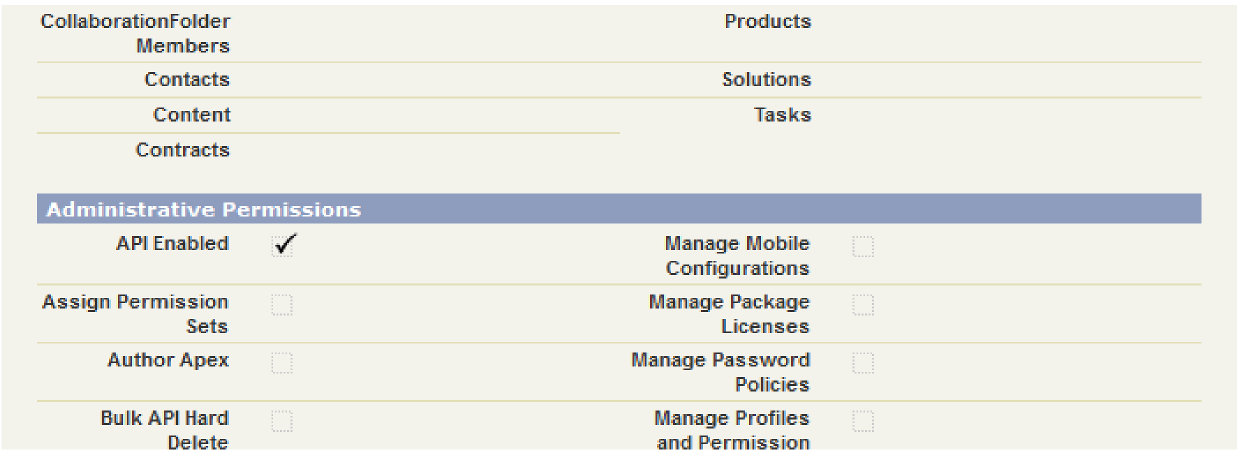
**Use Start and End times only**: If this is set then only the start and end time will be populated into the *Comments* section for a call history entry.

# Configuration

For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to SalesForce.

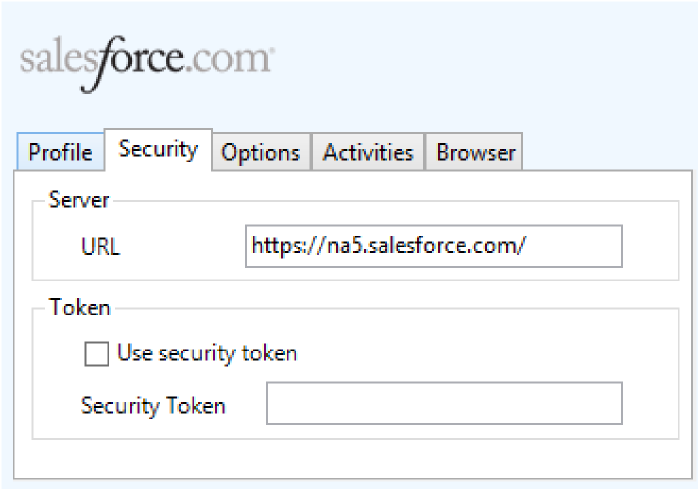
## User authentication

The plugin requires a valid SalesForce username and password to be entered. These are the details that will be used for searching and creating history records. Ensure that the user has the appropriate permissions within SalesForce to do this. As a minimum they need to have the *API Enabled* flag set on their *Profile*.

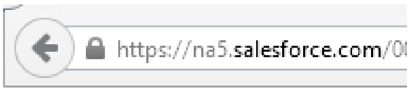



## Security

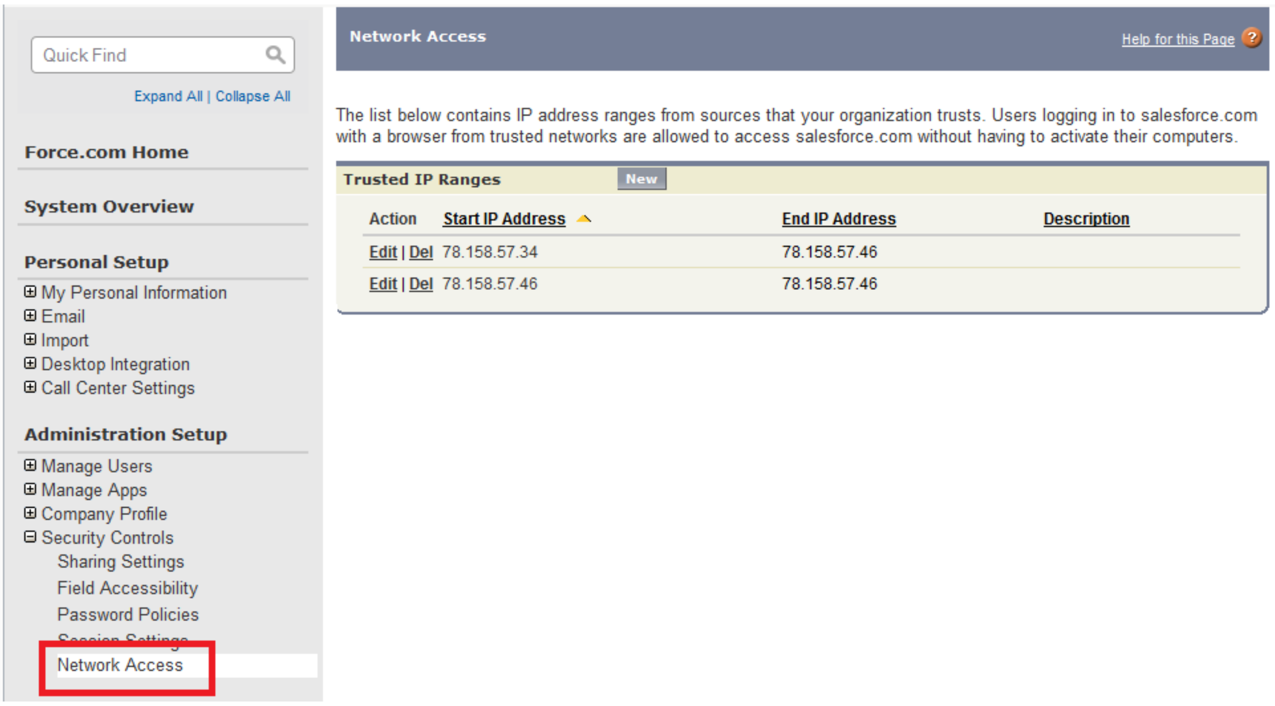
The Security tab enables the type of access and location of the Salesforce services to be set.




**Server -> URL**: This should be set to SalesForce server that your organization uses. This can be found by looking at the URL that is displayed in the address bar of the web browser once you have logged into SalesForce.

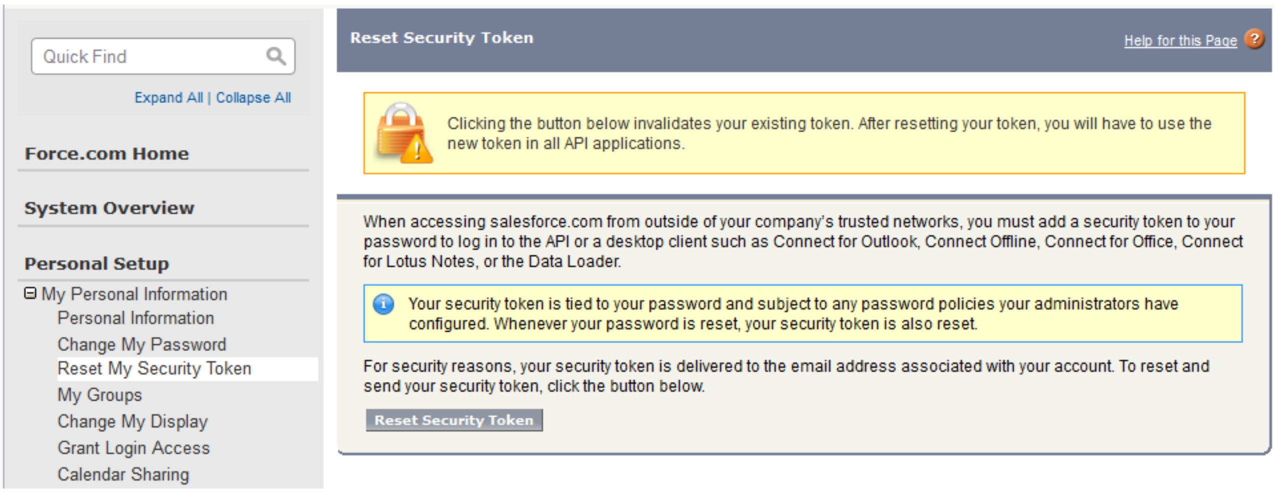



**Token**: Depending on the security configuration of SalesForce and how it is accessed will dictate what options are required. To connect to the SalesForce API requires that the public IP address that the user is connecting from is configured in the *Administration Setup* -> *Network Access* section under *Trusted IP Ranges.*




If this cannot be configured, for example if you have remote workers whose IP address changes all the time. Then the Security Token option will need to be enabled.

To create a Security Token from the *Personal Setup* -> *My Personal Information*- > *Reset My Security Token* section of Salesforce.com, select the *Reset Security Token* button. This will send an email to the associated user with their Security Token.




The email will contain the token and will look similar to the one shown below:

- y67lBpMdiBY02RkbDWqwhCEX

This value then needs to be entered into the Security Token section.