Powering connections

Mitel for Salesforce Connect Administration Guide

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November 2018

Description: This Guide describes the Mitel for Salesforce application. It explains how to associate Salesforce records with any call, add comments to the user record, then transfer the call with its associated data to another agent.

Contents

Introduction

Mitel for Salesforce enables a single-source view of all your business communications and customer interactions. This tight integration unifies voice and customer data and enhances the functionality of both the phone and CRM applications. It's easy to associate Salesforce records with any call, add comments to the user record, then transfer the call—with its associated data—to another agent. Users can create dashboards to track contacts, which can serve as an early indicator of sales, service or operational performance.

The Mitel for Salesforce Application and its Cloud Softphone integrates into Salesforce using Salesforce's Open CTI (Computer Telephony Interface). This application supports Citrix and Windows Terminal Services (WTS) environments and requires no desktop client software.

The Mitel Softphone is the customizable, browser-based Unified Communications (UC) tool embedded within Salesforce pages. Being browser and platform agnostic, the Mitel Softphone provides full feature capabilities across all internet browsers on all platforms. Do not confuse this Salesforce embedded "softphone" with the Mitel Connect client softphone.

The Mitel Softphone features include:

- Compatible with Classic pages, Console pages and Lightning pages.
- Make calls by dialing a number in the Softphone, choosing a number from the QuickDialer dropdown menu or by click-to-dial from a phone number on any Salesforce page.
- View multiple active phone calls within the Softphone with automatic screen pop of the caller's contact detail and history.
- Automatic display of Salesforce entities like contacts and accounts that are associated with calls based on a Mitel Contact Center call profile value (MiCloud Connect only), the caller's phone number, and called number.
- Quick Dialer access to Mitel directory entries and Outlook contacts, as well as real-time telephony presence icons.
- Full embedded call control features including answer, hold, hang-up, transfer, and initiate conference.
- Connect Availability State control (when user is not configured as a MiCloud Contact Center CRM user) and automatic synchronization with the Connect Client and IP phones.
- Workgroup Agent Status control and automatic synchronization with the Connect client (MiVoice Connect only).
- Workgroup Agent Status integration with workgroup call handling and call log (MiVoice Connect only).
- Configurable Softphone call information displays.
- Call log can be automatically saved in Salesforce Activity History with association to Salesforce entities.
- Include custom Activity object fields on the Mitel softphone (requires Salesforce Enterprise edition or above).
- Administrator configurable "Call Result" picklist to categorize inbound and outbound calls.
- Quick links to retrieve call logs for the last three calls or calls for the day.
- Support for Salesforce Workspace Transfer to make the current contact, case, account, etc. pop on another agent's browser when the call is transferred.

- Push Page function, which allows one user to make their current Salesforce page automatically appear on their colleague's browser during an internal call to each other.
- For customers who have also deployed Mitel Call Recorder, click-to-play audio recordings automatically embedded in associated call activity records (MiVoice Connect only).

Requirements

The Mitel for Salesforce Application requires the following:

- Mitel MiCloud Connect or Mitel MiVoice Connect.
- The Contact Center enhancement on Salesforce is available only for MiCloud Connect.
- Mitel ONSITE server(s) or an Edge-Gateway must provide a trusted certificate (e.g., root-signed) for secure communication (HTTPS) with the browser.
- A Salesforce.com account with Professional, Enterprise, or Performance Edition. Note that Salesforce Enterprise Edition or higher is required to load APEX package which enables advanced features.
- The *Mitel Applications Licensing Server* is required for MiVoice Connect deployments with either a trial or permanent license key for the Mitel for Salesforce application.
- Users on MiCloud Connect must have the Premier profile or above.
- For Contact Center, users must have the following licenses:
- Agent Premier or above
- **Enable as CRM User** option is enabled on the agent profile General settings
- A computing device on which to run the browser. This can be a Windows machine, Mac, or iPad.
- Application users must have one of the following supported operating systems and HTML 5 browsers:

OS	IE 9	IE 10	IE 11	Edge	Chrome (version 28+)	Firefox (version 23+)	Safari (version 30+)	Mobile Safari
Windows 7 SP1			√[3]		√	√		
Windows 8, 8.1 (desktop version, non-metro UI)			√[3]		√	√		
Windows 10			√[3]	√	√	√		
Mac (10.7 or greater)					√	√	√	
iOS version 6+ (iPad, iPhone)					√			√
Android version 3.2 or greater1					√			
Linux					√[2]	√[2]		

Table 1 - Requirements

1 Other versions of Android have not been validated but should work.

2 These browsers have not been validated on Linux but should work.

3 Salesforce does not support IE11 on Lightning interface.

Architecture and Overview

The graphic below depicts the Mitel for Salesforce Application architecture and interfaces between high-level components. The Mitel for Salesforce Application has two major interfaces, one with Salesforce in the cloud over the internet and the other with either MiCloud Connect on the internet or Mitel MiVoice Connect within the customer intranet.

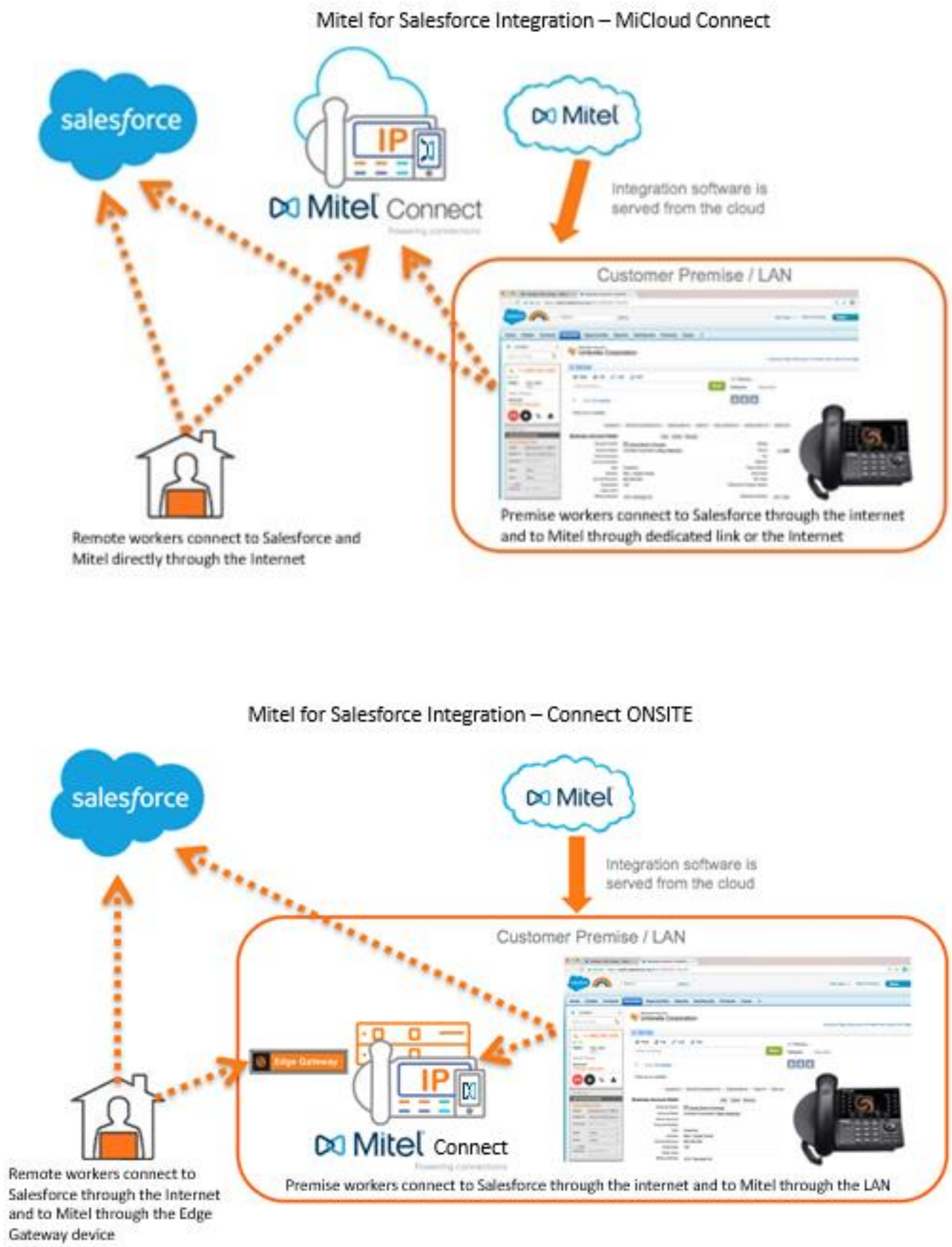


Figure 1 - Mitel for Salesforce Integration – ST14.x

Domain and Network Port Access

The Mitel for Salesforce application requires browser access to Salesforce and to the following domains:

Domain	Port(s)
staasf.shoretelsky.com (softphone)	443
***.shoretel.com (CLOUD)**	443, 5448
HQ/DVS (ONSITE)	443, 5448

Table 2 - Domain and Ports

Mitel for Salesforce Implementation

Salesforce implementation

Step 1 – Download the Mitel Call Center 5.4 XML Configuration File

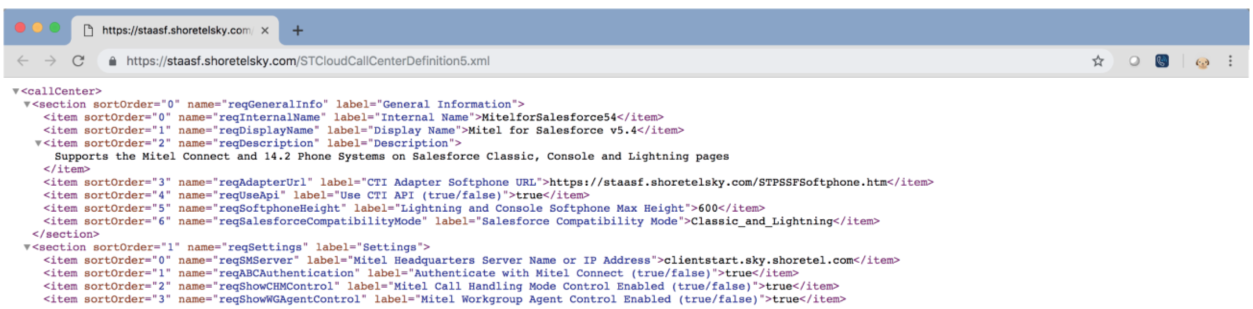
Telephony integration is configured and assigned to users using what Salesforce calls “Call Centers.” The first step is for the Salesforce administrator to import the Mitel for Salesforce Call Center XML file to create the call center. The Call Center is a group of settings that allows Salesforce to find the Softphone code and to configure the various features of the softphone.

New users will want to download and import the XML file. Current users who are upgrading will want to download and import the updated XML file if they wish to take advantage of the new configuration options supported in the current Softphone.

Note: A Call Center only affects a Salesforce user when they are assigned to it. You can therefore import a new Call Center and adjust settings without affecting users on the system until you are ready to assign them to this new Call Center.

Click on this link to download the Mitel Call Center configuration file.
https://staasf.shoretelsky.com/STCloudCallCenterDefinition5.xml

Save the web page to the desktop by using the browser “Save As…” command. This can usually be accessed in the web browser by using pressing Ctrl+S from the keyboard as shown here:

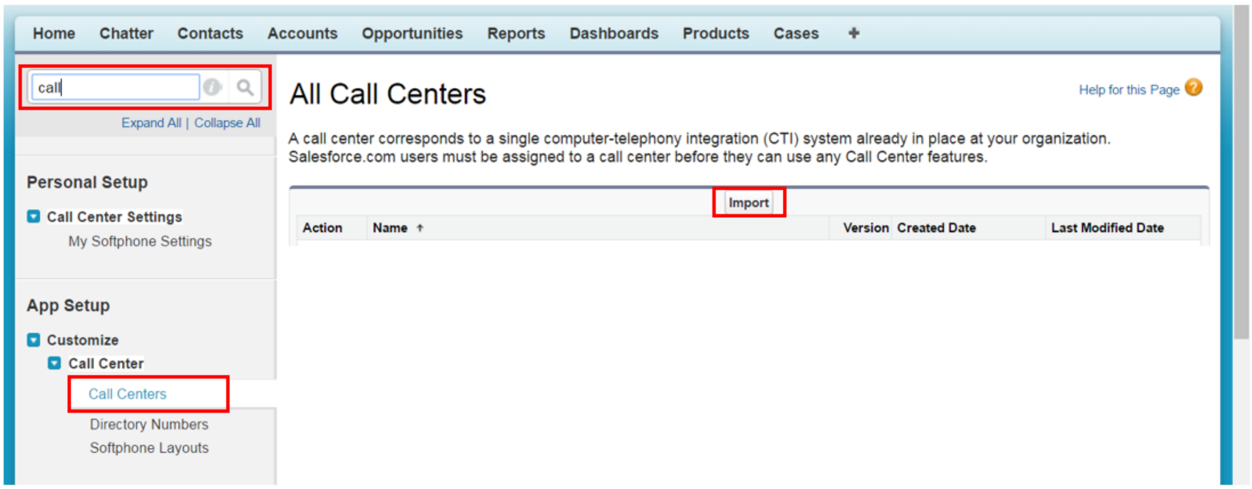


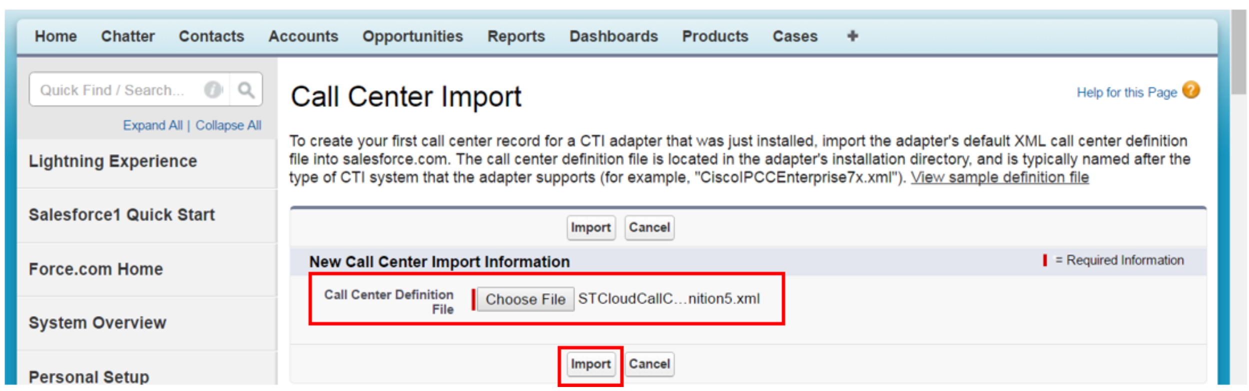
Select a location such as your desktop and click the Save button to save the file. The file name should default to “STCloudCallCenterDefinition5.xml”.

Step 2 – Import the Call Center Definition into Salesforce

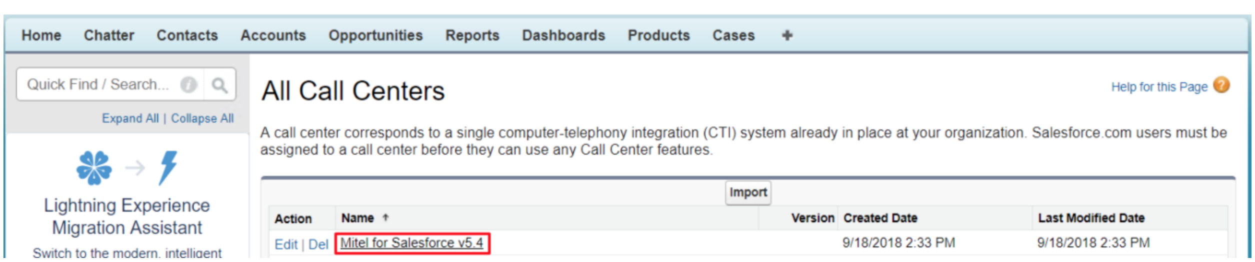
Log into Salesforce with administrator credentials and go to “Setup”. In the quick find box, type in “call”.

On the “All Call Centers” screen, click the Import button:





The below image shows the properly installed “Mitel for Salesforce 5.4” call center:



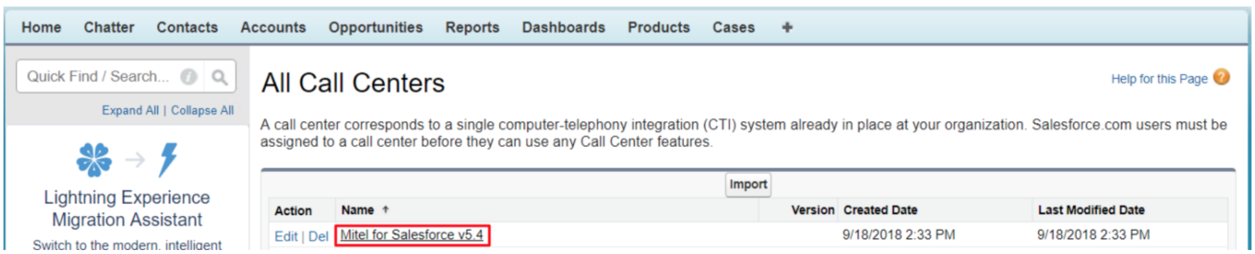
Step 3 – Configure the Call Center Definition

Mitel CTI Adapter URL and the Mitel Headquarters Server Address

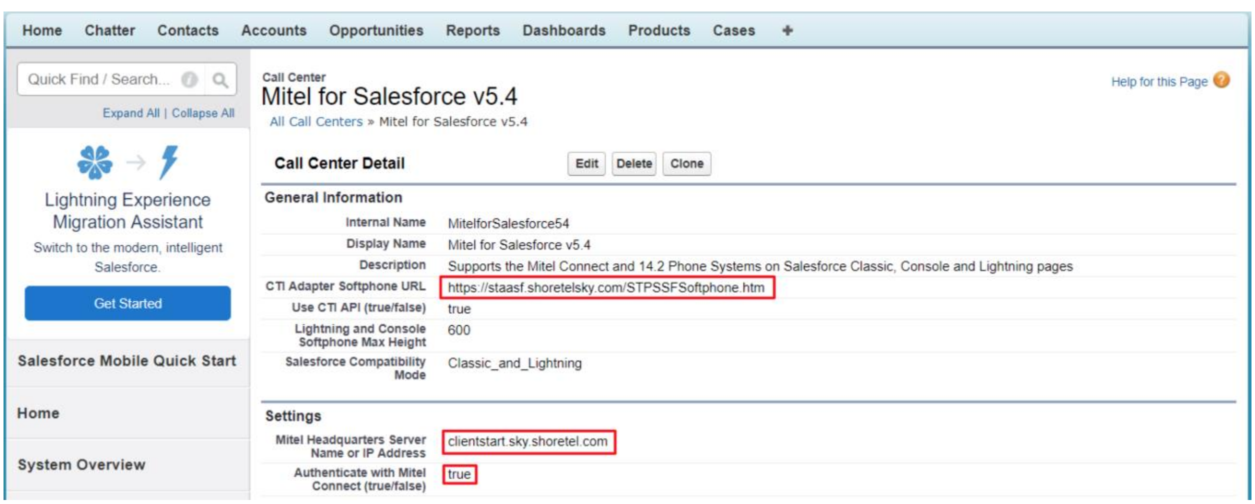
Before the Softphone can function, a Salesforce administrator must configure several settings of the “Mitel Adapter Version 5.4” Call Center adapter. The Call Center adapter defines the settings used by the Mitel application. This Call Center adapter was installed by previous import procedure.

The Salesforce administrator accesses the settings by navigating as follows:

1. In Salesforce, click Your Name ➤ Setup ➤ Customize ➤ Call Center ➤ Call Centers.
2. If the Introducing Salesforce CRM Call Center splash page appears, click Continue.
3. To view the settings, click on the “Mitel for Salesforce 5.4” link as highlighted in the screenshot below.



Doing so will display the “Call Center Details” for the Mitel for Salesforce Application as shown below. To edit the settings, click the Edit button at the top of the page. After making changes, click Save at the top or bottom of the page.



All of the settings are described later in the Debugging logs

If there is an error, the logs need to be sent to the Mitel support representative as the integration runs on the local workstation and logs are saved locally.

Click Settings > Log To Console and bring up the developer tool to see the Console.

When you receive a call, the logs are displayed on the Console screen. The respective error log, which is highlighted in red, can be downloaded and sent to the Mitel representative to debug the issue.

Detailed Configuration section of the document. However, before the integration can function, there are three key settings that must be set:

General Information

CTI Adapter Softphone URL and Standby Softphone URL: This tells Salesforce from where to load the softphone page when a user is using this call center definition. These URLs are hosted on a MiCloud server and must be configured to use HTTPS as shown below:

CTI Adapter Softphone URL: https://staasf.shoretelsky.com/STPSSFSoftphone.htm

> **Note:** The shoretelsky.com servers are strictly a software repository for this solution.

Settings

- **Mitel Headquarters Server Name or IP Address:** This is used by the integration to access the Mitel phone system.

  For Mitel Connect, the value is a hostname, which depends on the deployment type:

  - MiCloud Connect:
    - clientstart.sky.shoretel.com (US)
    - clientstart.sky.shoretel.eu (UK/Europe)
    - clientstart.sky.shoretel.com.au (Australia)
  - MiVoice Connect: The fully qualified domain name (FQDN) of either the Mitel HQ server or Edge-Proxy.

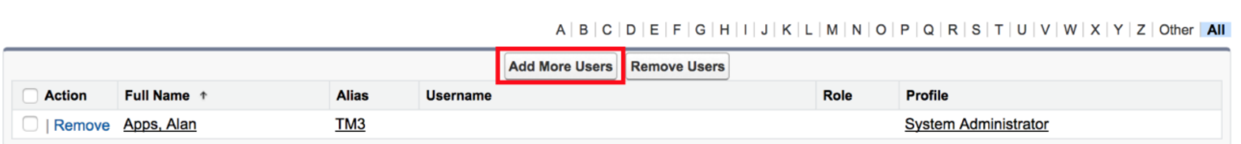
> **Note:** The ONSITE Mitel HQ (and DVS) server(s) must have a root-signed SSL cert from a recognized cert provider. The Mitel MiVoice Connect system generates self-signed certs when you install the software. While these self-signed certs will work for the Connect Client and the 400 series phones, workstation browsers do not honor self-signed certs by default and so will not allow the connection. The self-signed cert needs to be replaced with a root-signed cert using the process described in the Mitel Connect Administration Guide.

- Authenticate with Mitel Connect.
  - This value must be set to **true**.

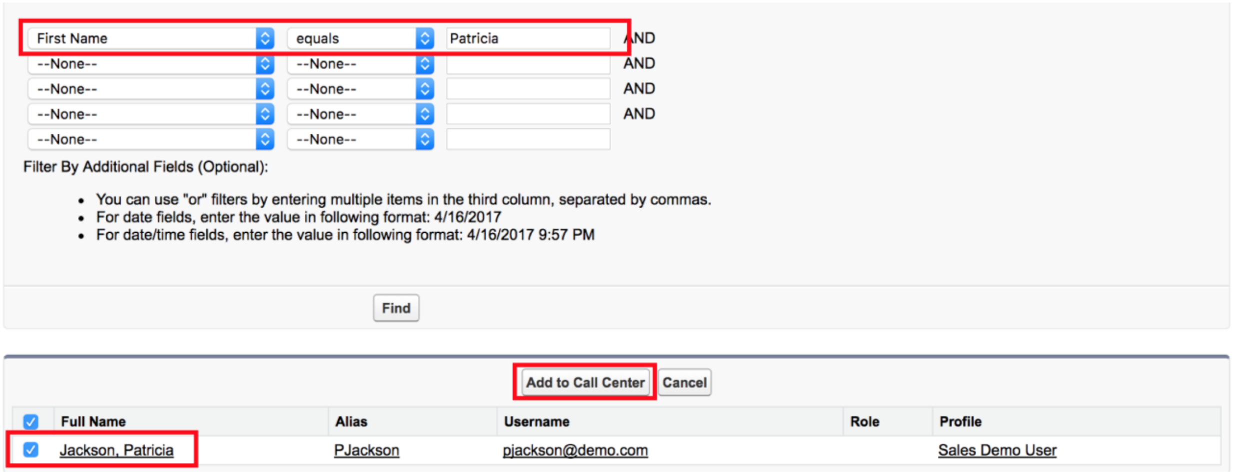
Step 4 – Assigning Users to the Call Center

In addition to the basic configuration of the Call Center, users must be assigned to use the Mitel Call Center. At the bottom of the page showing the details for the “Mitel for Salesforce 5.4” Call Center, click the Manage Call Center Users button. For additional details as well as how to set the Call Center when editing a user, see the Manage Call Center Users section.

Click [Add More Users]



Search for the specific user(s). Check the box next to their name(s). Click [Add to Call Center].



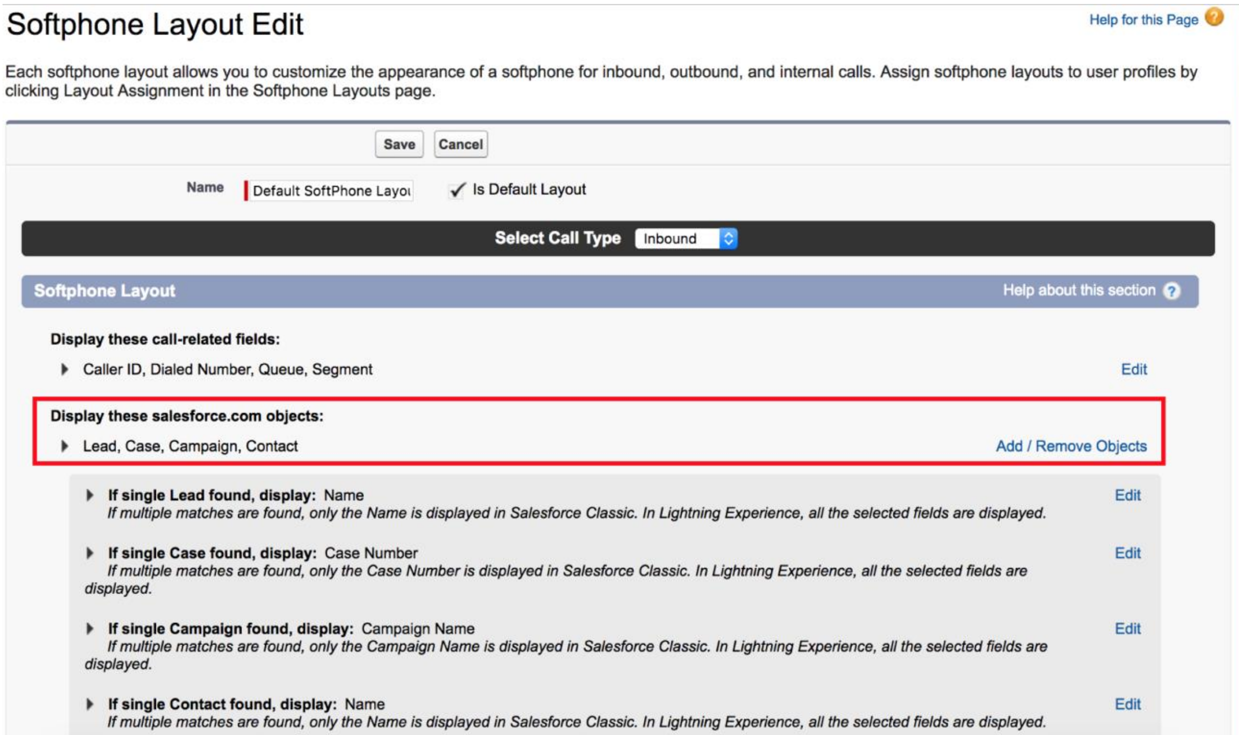
Note: To switch a user from an existing call center to a new one, you will need to first remove the user from the existing call center.

Step 5 – Creating a Softphone Layout and Associating Users

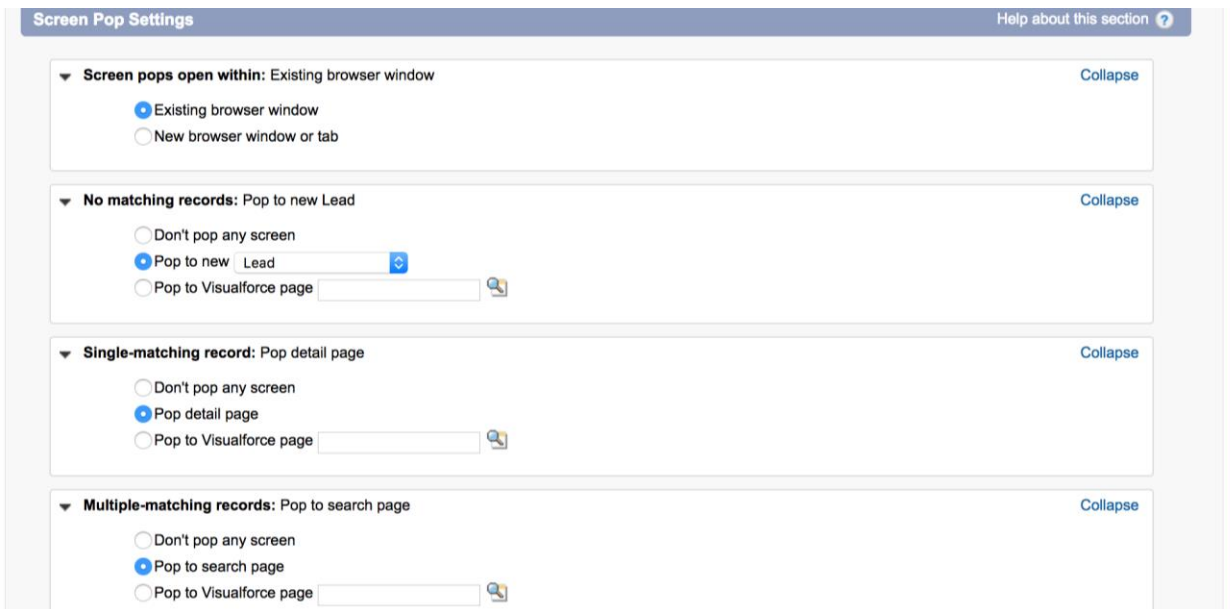
In addition to associating users with the Mitel Call Center, users must also be associated with a valid Softphone Layout. Go to “Setup”. In the quick find box, type in “call”.

Click the Edit link next to the Default SoftPhone Layout.

The top section controls the database objects that are searched when a call is received. The default configuration includes Lead, Contact and Account. If you need to include other database objects that contain phone number fields, click the Add/Remove Objects link.



The bottom section controls the behavior of the integration.



- Screen pops open within – Screen pops can occur in the current browser tab or open a new tab. The default is to pop within the existing tab. If you are using the Classic pages, we recommend the “New browser window or tab” option. If you are using Lightning pages, we recommend the “Existing browser window” option.
- No matching records – If no record with a matching phone number is found, the integration can do nothing, pop a new record (ex. a new Lead), or pop a custom Visualforce page. The default is to do nothing.

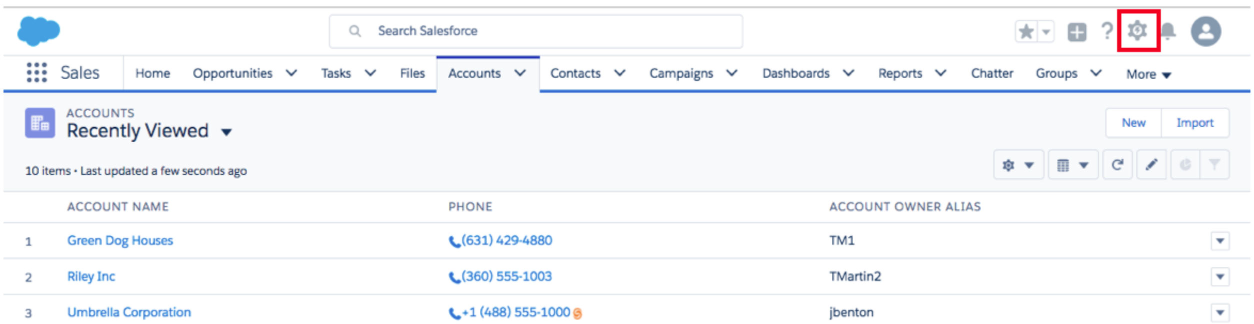
- Single-matching record – If the phone number of the caller is found on a single record, the integration can do nothing, pop the detail page where the phone number was found or pop a custom Visualforce page. The default is to pop the detail page.
- Multiple-matching records – If the phone number of the caller is found on several records, the integration can do nothing, pop a search page listing or pop a custom Visualforce page. The default is to do nothing. We recommend popping the search page.

> **Note:** The "Screen Pop Settings" portion of the Softphone Layout will only appear if the Salesforce administrator is assigned to the Call Center.

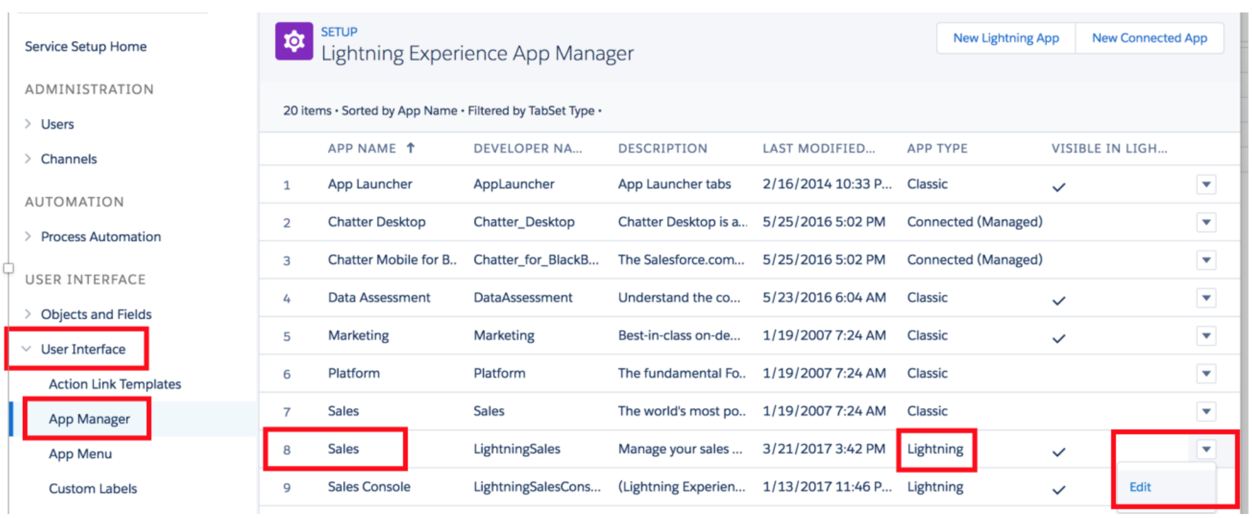
Step 6 – Adding the CTI Softphone to the Lightning Toolbar (Optional)

This step only applies if you wish to use the Mitel for Salesforce integration on Lightning. If not, please proceed to Step 7 – Load APEX Package (Optional).

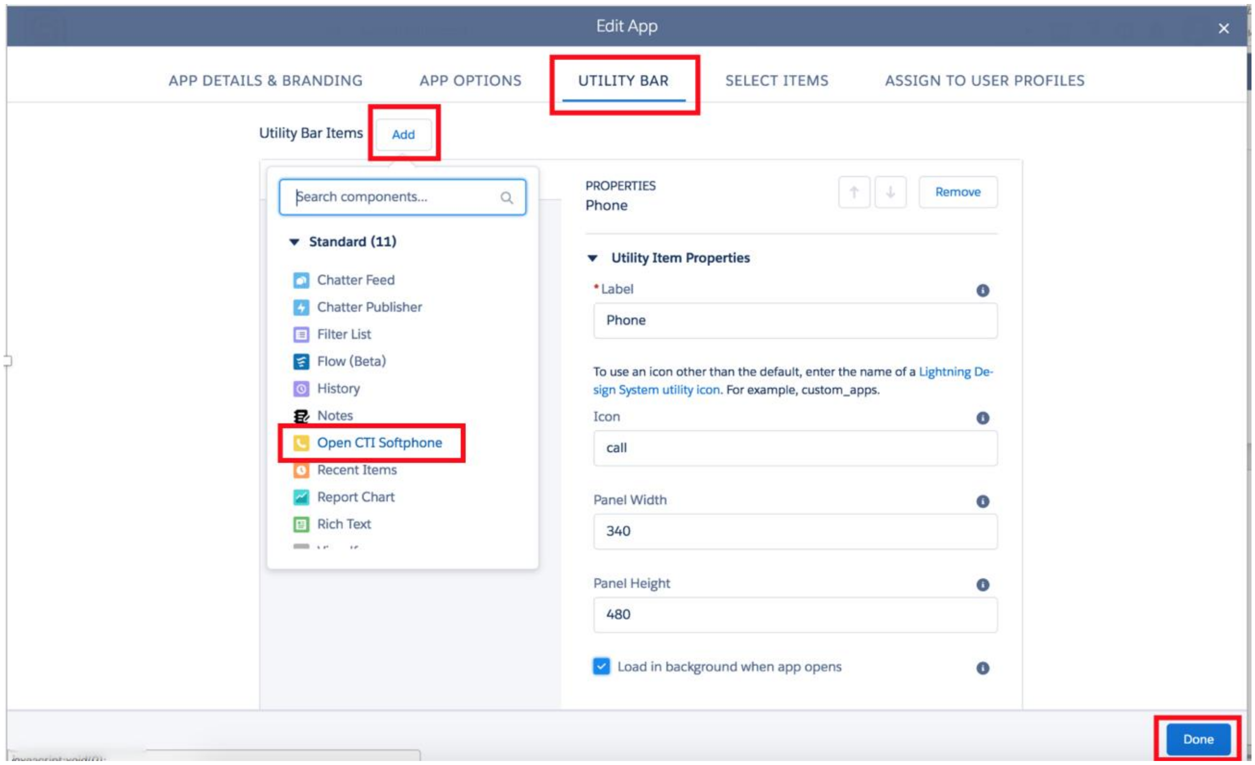
Switch to the Lightning Experience if not already there. Click the gear icon and select Setup.



Select User Interface > App Manager. Find the app that your team uses. For example, the Sales App (Note that this must be a Lightning type app). Click the down arrow on the right and select Edit.



Select the Utility Bar and click [Add]. Select the Open CTI Softphone and click Done.



Step 7 – Load APEX Package (Optional)

There are several additional optional features of Mitel for Salesforce that are enabled by installing an additional package containing mainly some additional Apex Classes.

This package is required to enable the following features:

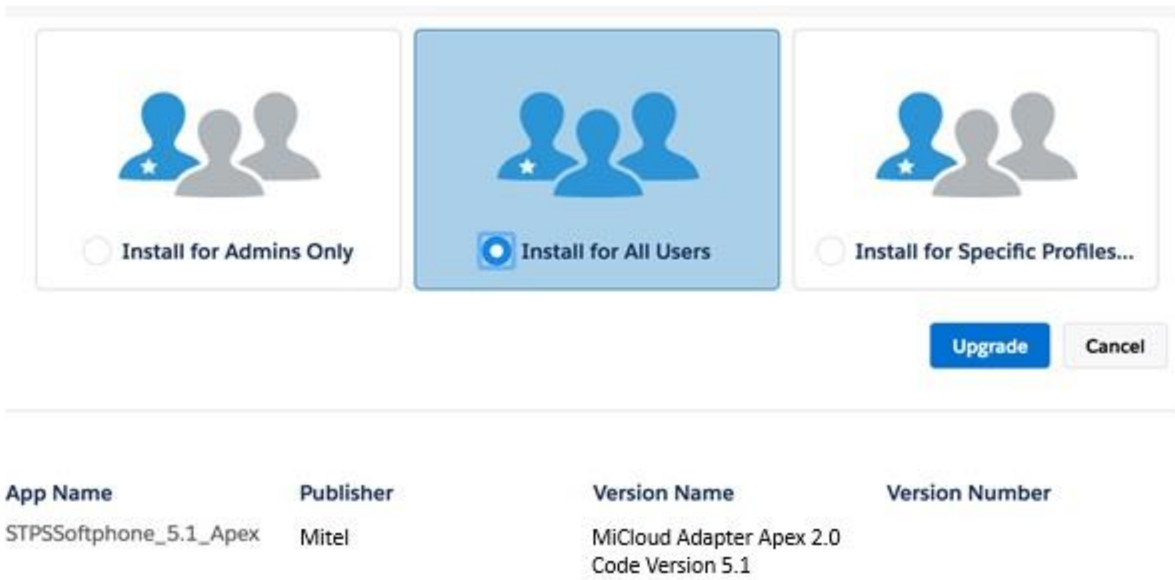
- Use an existing Task Activities to seed a call note when making calls from open Task Activities advantage and/or navigate to an existing open Task Activity record and use it to seed the current call note.
- Configure additional Salesforce Task Activity fields to show up in the call note areas of the softphone. This is described in the Advanced Call Logging section.
- Want to be able to potentially support application integration features as described in Appendix B.

> **Note:** This package can only be installed in the Salesforce Enterprise Edition or higher. The package is not supported on the Salesforce Professional Edition.

To install the package in the PRODUCTION instance, the customer's Salesforce Administrator will need to access this URL:
https://login.salesforce.com/packaging/installPackage.apexp?p0=04t500000003rft

To install the package in the SANDBOX instance, the customer's Salesforce Administrator will need to access this URL:
https://test.salesforce.com/packaging/installPackage.apexp?p0=04t500000003rft

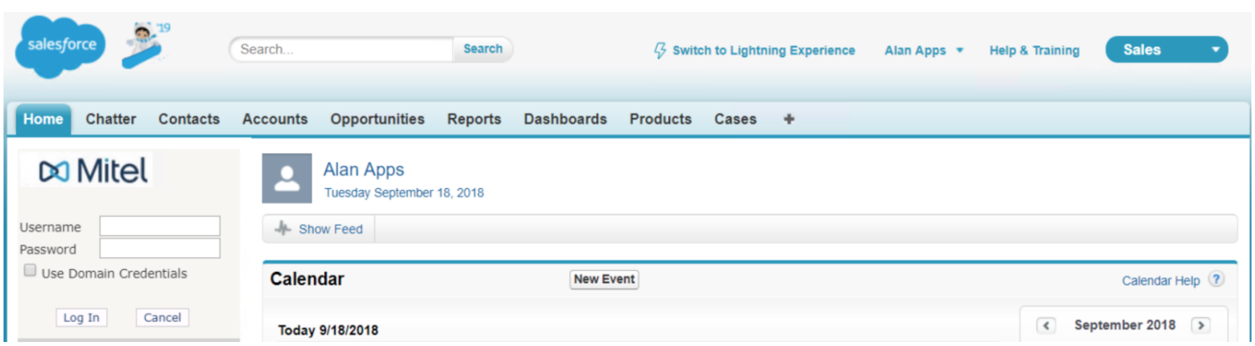
Follow the instructions. Permission should be granted to all users.



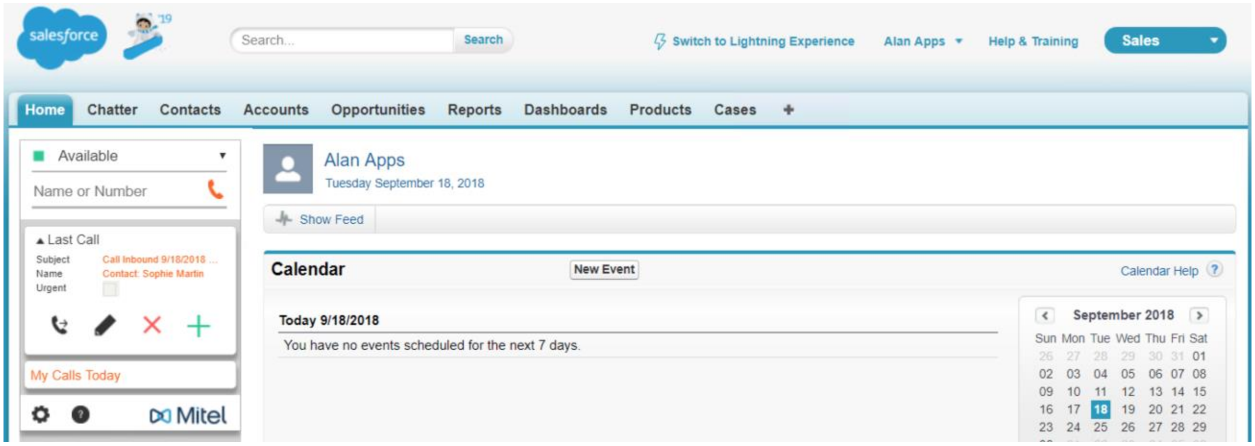
Step 8 – Test the Softphone

Upon logging into Salesforce, you will be prompted to enter your Mitel credentials. Use the same credentials as you use to log into the Connect Client.

> **Note:** The "Use Domain Credentials" option allows you to login without entering your username/password. For this option to work, the Mitel user profile must be linked to an AD user account AND the user must be on the corporate network or have an active VPN connection. If the user is off-net, they should enter their username and password.



After entering your credentials, the softphone should display as follows:



Softphone Display Errors

The following list contains some of the common softphone display errors:

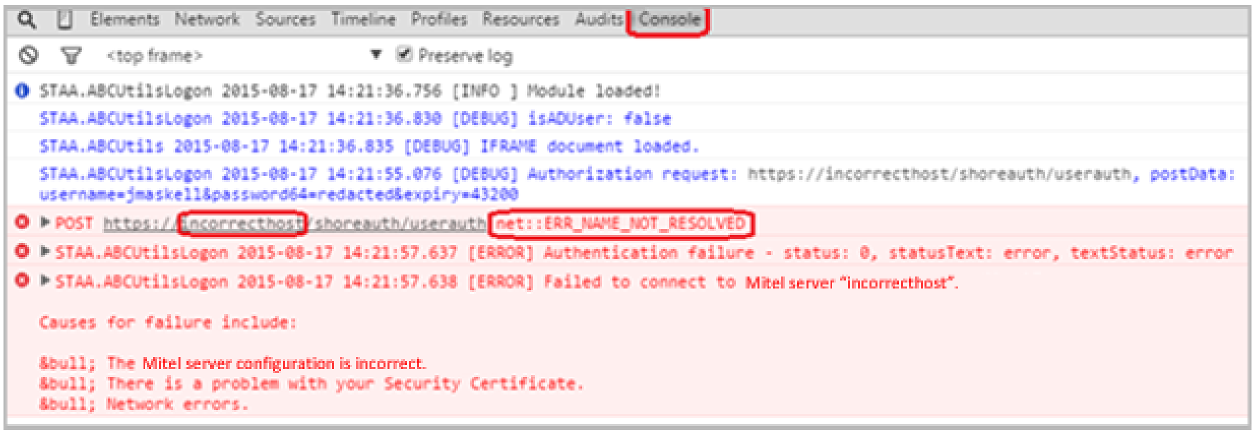
- **Softphone Does Not Load:** This is usually caused by misconfiguring the "Softphone URL" URL in the Call Center Definition. Please verify that the URL begins with "https".
- **Other Errors:** The following list contains some of the common causes for log on failures:
  - The Mitel server is incorrect in the Call Center Definition.
  - MiVoice Connect - The certificate from the ONSITE server(s) or Edge-Gateway is not trusted. Note that when you install MiVoice Connect, it will generate a self-signed SSL cert. While the self-signed SSL cert will work fine for the Connect client and the 400 series IP phones, it will not be honored by the browsers. You must install a root-signed cert using Director as covered in chapter 4 of the Mitel Connect System Administration Guide.
  - Network errors.

Troubleshooting Softphone Display Errors

The browser console can provide information on the cause for softphone display errors and can be opened by entering Cntl-F12 and selecting the console tab. The examples below use the Chrome browser.

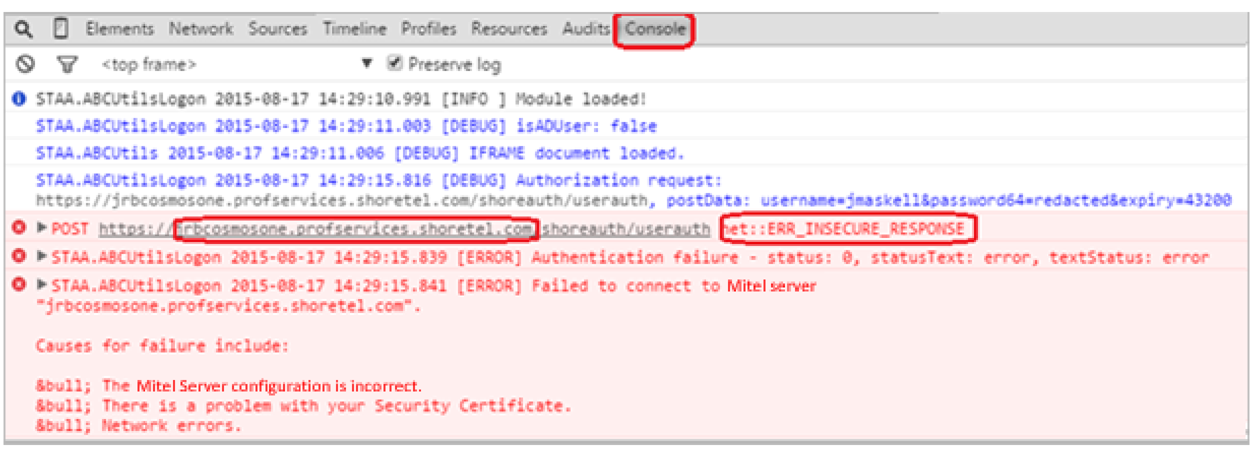
Mitel Server Configuration Error

Look for “POST” command to either “https://<server name>/shoreauth/userauth” or “https://<server name>/shoreauth/useradauth” with an error like “name not resolved”. In the example below the server name “incorrecthost” is incorrect.



Certificate Error

Look for “POST” command to either “https://<server name>/shoreauth/userauth” or “https://<server name>/shoreauth/useradauth” with an error like “insecure response”. In the example below the server “jrbcosmosone.profservices.shoretel.com” did not provide a trusted certificate.



Debugging logs

If there is an error, the logs need to be sent to the Mitel support representative as the integration runs on the local workstation and logs are saved locally.

Click Settings > Log To Console and bring up the developer tool to see the Console.

When you receive a call, the logs are displayed on the Console screen. The respective error log, which is highlighted in red, can be downloaded and sent to the Mitel representative to debug the issue.

Detailed Configuration

The MiCloud Softphone is quite flexible in how it works. The key to this variability is through the configuration of two sets of settings, the Call Center configuration and the SoftPhone Layout configuration. Both settings are accessed by the Salesforce administrator through the Setup menu.

Each Salesforce user can be assigned to a specific Call Center. A group of users can be assigned to a specific SoftPhone Layout by security profile. By cloning the MiCloud Adapter Call Center Definition and creating or cloning existing SoftPhone Layouts, different groups of users can have different configuration settings.

Call Centers Setting

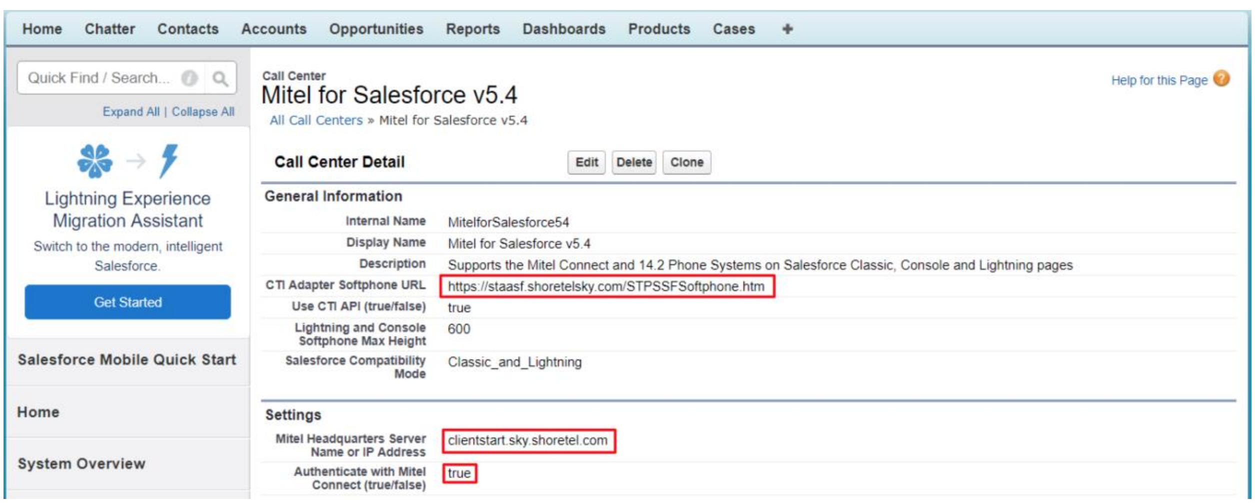
To work with the call center definition:

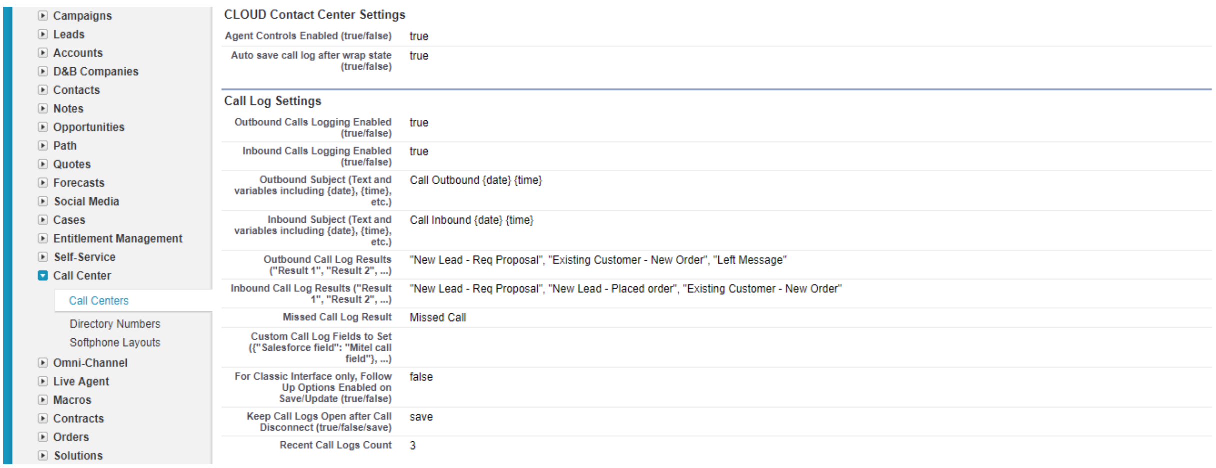
Click Your Name ➤ Setup ➤ App Setup ➤ Customize ➤ Call Center ➤ Call Centers.

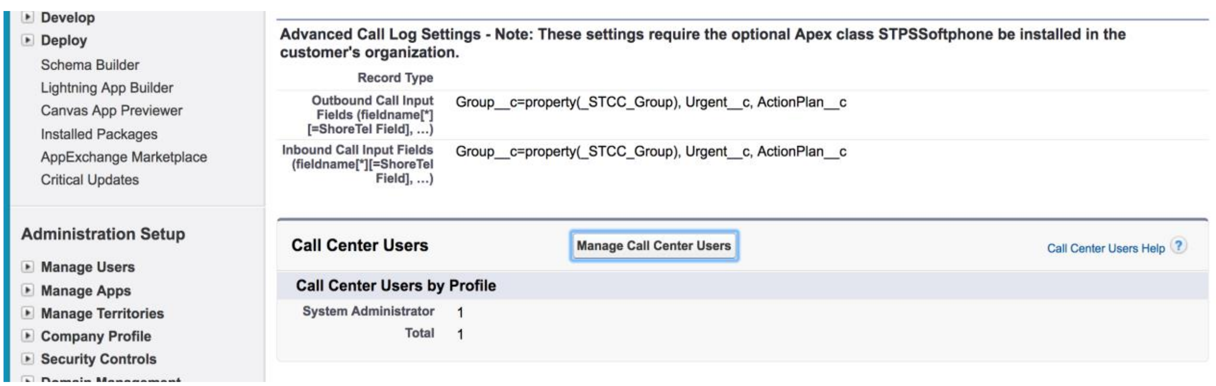
Assuming you have not renamed or copied the default call center definition then select the:

Mitel for Salesforce 5.4

This will display the settings as below:

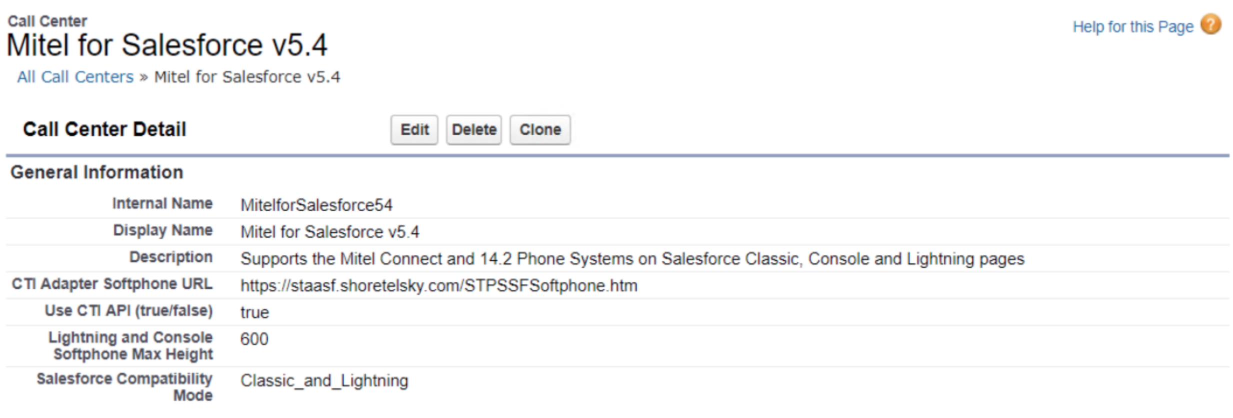






The settings are divided up into 4 areas. The following section describes each setting and what it is used for.

General Information



Call Center

Mitel for Salesforce v5.4

All Call Centers » Mitel for Salesforce v5.4

Help for this Page

Call Center Detail Edit Delete Clone

General Information

Internal Name	MitelforSalesforce54
Display Name	Mitel for Salesforce v5.4
Description	Supports the Mitel Connect and 14.2 Phone Systems on Salesforce Classic, Console and Lightning pages
CTI Adapter Softphone URL	https://staasf.shoretelsky.com/STPSSFSoftphone.htm
Use CTI API (true/false)	true
Lightning and Console Softphone Max Height	600
Salesforce Compatibility Mode	Classic_and_Lightning

Internal Name

Internal Name represents the unique identifier for the call center in the database. Internal Name must be composed of no more than 40 alphanumeric characters with no white space or other punctuation. It must start with an alphabetic character and must be unique from the Internal Name of all other call centers defined in your organization. Once a value for Internal Name has been saved for a call center, it cannot be changed. If you clone a definition, you must make sure to provide a unique name before you can save the new definition. Adding new call center definitions allow different group of users to have different user interfaces.

Display Name

This is the name shown for the call center within Salesforce. If you clone the Salesforce Cloud Call Center Definition, then you should give a unique and distinctive name. For example, “MiCloud Adapter 5.4 for Sales Agents” for a call center definition configured with settings specific to a Sales group. The Display Name has a maximum length of 1000 characters.

Description

This is a longer description of the Call Center Definition, 1000 characters maximum.

CTI Adapter Softphone URL

This is a key setting in call center definition configuration for Mitel login and Cloud Softphone page to show up on Salesforce screen. This is discussed in the Installation | General Information | CTI Adapter URL section. Review the section for details of how this setting is used.

Use CTI API (true/false)

This should be set to true and should not be changed.

Softphone Height

On the Salesforce Console and Lightning pages, the height controls the maximum height that is used for the softphone popup.

Salesforce Compatibility Mode

This should be set to Classic_and_Lightning.

Settings

Settings

Mitel Headquarters Server Name or IP Address	clientstart.sky.shoretel.com
Authenticate with Mitel Connect (true/false)	true
Mitel Call Handling Mode Control Enabled (true/false)	true
Mitel Workgroup Agent Control Enabled (true/false)	true
Mitel Recorder Controls Enabled (true/false)	true
Click to Dial Enabled (true/false)	true
If only one record found on incoming call open the record automatically (true/false)	true
Show Softphone for New Calls in Lightning and Console (true/false)	true
Inbound Call Fields ({"label": "Mitel call field"}, ...})	{"Dialed": "called"}, {"DNIS": "dnis"}, {"From": "from"}
Outbound Call Fields ({"label": "Mitel call field"}, ...})	{"Caller": "caller"}
For Classic Interface only, New SF entity for unknown caller PHONE NUMBER form field ID	
For Classic Interface only, New SF entity for unknown caller NAME form field ID	
For inbound calls, search on dialed number (DNIS) in addition to caller's number (true/false/and)	true
Salesforce Service Console Users (true/false)	
Additional Options ("Option": Value, ...)	"LogSticky":true

This section contains the core settings used by the softphone. Except for the Mitel Headquarters Server setting, the other settings control aspects of the softphone's user interface.

Mitel Headquarters Server Name or IP Address

Here is where you must specify Mitel Connect hostname, which depends on the Connect deployment type:

- MiCloud Connect:
  - clientstart.sky.shoretel.com (US)
  - clientstart.sky.shoretel.eu (UK/Europe)
  - clientstart.sky.shoretel.com.au (Australia)
- MiVoice Connect: The Fully Qualified Domain Name (FQDN) of either the Mitel HQ server or Edge-Proxy.

Authenticate with Mitel Connect

This value must be set to “true”.

Mitel Call Handling Mode Control Enabled (true/false)

This controls whether the softphone, when running, displays a control at the top to allow users to view and change their Mitel Availability State (formerly known as the Call Handling Mode). Changing the Availability State on the Mitel Softphone also updates the Availability State on the Connect client and the IP phone. If this setting set to false and the control is not shown, users can still view and change their Availability State using their phone or the Mitel Connect client. Refer to Usage **|** Exploring the Softphone Layout and Features **|** Availability State section for details.

Mitel Workgroup Agent Control Enabled (true/false)

Applies to MiVoice Connect only. This controls whether the softphone, when running, displays a control at the top to allow Mitel Workgroup agents to view and change their Workgroup agent status. If set to true and the user is a workgroup agent then the control is shown; otherwise, the control is not shown. Note that even if the control is not shown, users who are workgroup agents can still view and change their Workgroup Agent status using their phone or the Connect client. Refer to Usage **|** Exploring the Softphone Layout and Features **|** Mitel Workgroup Agent Status Section for more details.

Mitel Call Recorder Controls Enabled (true/false)

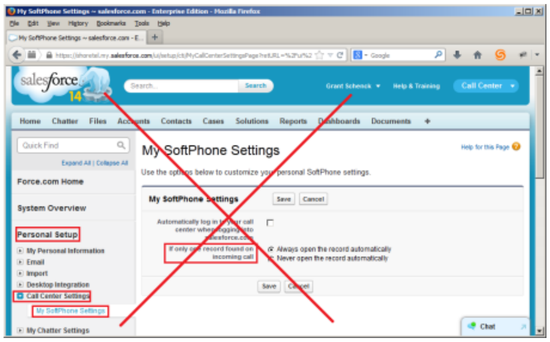
Applies to MiVoice Connect only. If the Mitel Call Recorder is installed and the recording profile settings allow the user to pause/resume, save/don’t save, start recording, etc., this control determines if the pause/resume, save/don’t save, etc. buttons should be shown in the Mitel for Salesforce integration.

Click to Dial Enabled (true/false)

If set to true, the phone number fields in Salesforce will become click to dial links.

If only one record found on incoming call open the record automatically (true/false)

This setting controls the automatic screen pop of the softphone. Note that it replaces the equivalently named Salesforce users setting (Personal Setup **|** Call Center Settings **|** My Softphone Settings) which is NOT used due to limitations in the Salesforce provided framework:



Show Popup for New Calls in Lightning and Console (true/false)

This setting is only used if the user is running the softphone on the Salesforce Service Console or on the Lightning pages. If the user is running on the Service Console or the Lightning pages and this setting is set to true, then the screen popup will automatically appear when a new call presents. If this setting is set to false, users must manually click the phone icon to show the softphone.

Inbound Call Fields ({"label": "Mitel call field"}, {…})

This setting is used to control the call related fields that are shown for inbound calls in the softphone. The format, as reflected in the field name, is a text label enclosed in quotes followed by a colon (':') and then the name of a call field in quotes all surrounded in curly brackets for one field. For example, to display a label of "Caller" with a value of the call's "conn" field contents then you would set this field's value to:

{"Caller": "conn"}

If you want to display multiple fields then you would add additional label/value pairs separated by commas. For example, to display a Caller field and a DNIS field you would set this value to:

{"Caller": "conn"}, {"DNIS": "dnis"}

The fields available are as shown in the table below. If a field is not set or has no value then neither the label nor the value will be shown. For example, some fields may not be set for specific calls or all calls of a certain type such as dnis for outbound calls. In fact, you are free to reference any field name you want. Refer to Usage | Exploring the Softphone Layout and Features section for examples of resultant softphone displays.

> **Note:** More fields can be added in the future, or existing fields could be removed. Mitel for Salesforce Application Release Notes will document the revisions while this guide only documents the latest design.

Field	Contents
called*	Combines called-num-cannonical and called-name.
called-num	For inbound calls, the number called. For outbound calls, the number dialed.
called-num-canonical	The called number but formatted as a canonical formatted number.
called-name	The name associated with the called party.
caller*	Combines caller-num-canonical and caller-name.

Field	Contents
caller-num	For inbound calls, the caller (ANI). For outbound calls, the calling party.
caller-num-canonical	The caller number but formatted as a canonical formatted number.
caller-name	The name associated with the caller party.
conn*	Combined conn-num-canonical and conn-name.
conn-num	The number of the party that the call is connected to, or for unconnected calls, the called party for outbound calls and the caller for inbound calls.
conn-num-canonical	The connected number but formatted as a canonical formatted number.
conn-name	The name associated with the connected party.
conn-im	Instant Message address of connected party.
conn-email	Email address of connected party.
dnis	DNIS friendly name supplied on the call.
Note	Call note.
Trunk	Trunk information string.
called-wg-name	If the call arrived via WG, the name of the original WG that was called.
data-conf-url	Participant URL of associated data conference, if any.
data-conf-leader-url	Leader URL of associated data conference, if user is the conference leader.
data-conf-web-callid	The call ID needed to associate the user with the extension in the data conference.
datetime	The date and time of the start of the call.
position	The call's stack position.
from*	Number and name field extract from the most recent route slip entry.
property(name)*	Special "field" that allows access to call's property (named-values). For example, the value of a call property named "_STCC_SERVICE" could be displayed using a field name of "property (_STCC_SERVICE)".
CP(Name)	Special "field" that allows access to the Call Property fields defined in the Contact Center. For example, the value of a Call Profile field named "Agent Number" can be displayed using a field name of "CP (Agent Number)".

Table 3 – Available Fields and Description

* Indicates composite field formed using existing fields.

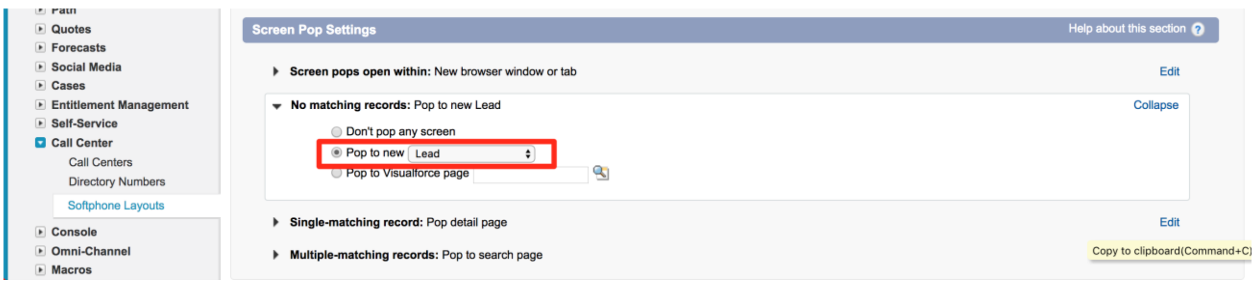
To enter long string of custom fields, administrators may use Notepad to get the string ready, then copy and paste into this setting.

Outbound Call Fields ({“label”: “Mitel call field”}, {…})

This setting is used to control the call related fields that are shown for outbound calls in the softphone. The format and the supported fields are identical to the previous Settings | Inbound Call Fields configuration details.

For Classic Interface only, New SF entity for unknown caller PHONE NUMBER form field ID and New SF entity for unknown caller NAME form field ID

This setting allows the auto-populating of a phone number field and/or a name field on a new entity form that is opened when there is no matching phone number found. A new record page can be configured to open in the Softphone Layout:



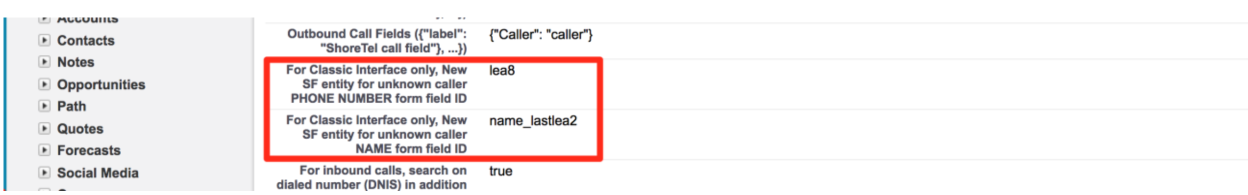
This setting allows the configuration of the internal ID of the input field on the new entity form (the Contact in this example) which should have the caller’s phone number and/or caller ID name automatically inserted. This value can be determined by opening the appropriate new entity form in Salesforce and then using the Browser’s developer tool to inspect the appropriate field on the form and retrieve its value.

Following are the current values for the main Phone and Name fields of the common entity types in Salesforce:

Entity Type	Phone Number Field ID	Name Field ID
Contact	con10	name_lastcon2
Account	acc10	acc2
Lead	lea8	name_lastlea2

Table 4 – Common Entity Types

Using the values listed above, this would be the configuration for inserting the caller ID phone number in the phone field on the new lead page and the caller ID name in the last name field on the new lead page.



Note: This feature is only supported on Classic and Console pages, not on Lightning pages.

For inbound calls, search on dialed number in addition to caller’s number (true/false/and)

This setting provides control over whether the number dialed by an inbound caller (commonly called the call’s DNIS), if available, will be included when searching for matching records in the customer’s Salesforce organization. If set to ‘true’ it will find records where the caller’s number matches OR the callers DNIS matches one of the phone fields on an entity. The ‘and’ setting will make the search more restrictive by only finding parties where the caller’s number AND DNIS match two separate phone fields on the searched entities.

For example, if you add a custom phone number field to the Campaign object and store a specific phone number for the campaign in that field, you can make Salesforce list the campaign when the call comes in on that specific phone number so that the agent knows that the caller is responding to that campaign.

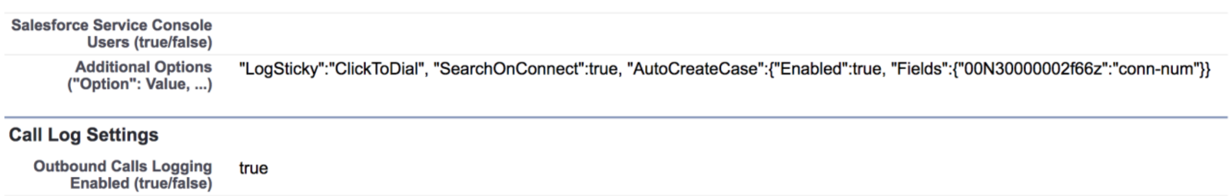
Salesforce Service Console Users (true/false)

This setting provides control over whether users will be using the Service Console interface vs. the Classic or Lightning interface when using the Mitel client. If set to ‘true’ then only Service Console users will have the operational Softphone. If set to ‘false’ then only Standard users have the operational Softphone. If unset, then both the fully operational softphone will be available regardless of the type of user. If the softphone is disabled it will show up like this:

If left unset then the Salesforce administrator must take care that users do not use both interfaces at the same time with the softphone enabled in both as per Salesforce, this is an unsupported usage scenarios and users will experience issues. See the note in the Limitations section at the start of this document.

Additional Options ("Option": Value, ...)

This setting is used to enable and configure special options.



These are the available options:

Keep Call Log Associations Static

The default behavior is for the Call Log to dynamically associate with the lead, contact, account, opportunity, etc. currently displayed in the main window. For example, if you are on a contact named John Doe, the call log will show Name Contact: John Doe. If you switch to Sally Jones, the log will update to Name Contact: Sally Jones. If you switch to the account page of the XYZ Company, the log will show Related-To Account: XYZ Company. The benefit of the dynamic association is that you are not locked into the first match found. However, in some use cases, this behavior is not ideal.

In those cases, you can enter an option to keep the log association static.

- Keep outbound log name and related-to associations based on the record from which you click-to-dial. Inbound log associations remain dynamic.
    - “LogSticky”: “ClickToDial”
- Keep outbound log name association based on the record from which you click-to-dial. The related-to association remains dynamic on outbound calls. Inbound log associations remain dynamic.
    - “LogNameSticky”: “ClickToDial”
- Keep both inbound and outbound log association set to the first value (first match on inbound calls and click to dial origin on outbound calls). User can manual change the values using the pick list.
    - “LogSticky”: true

Search and Pop record when call is answered instead of ringing

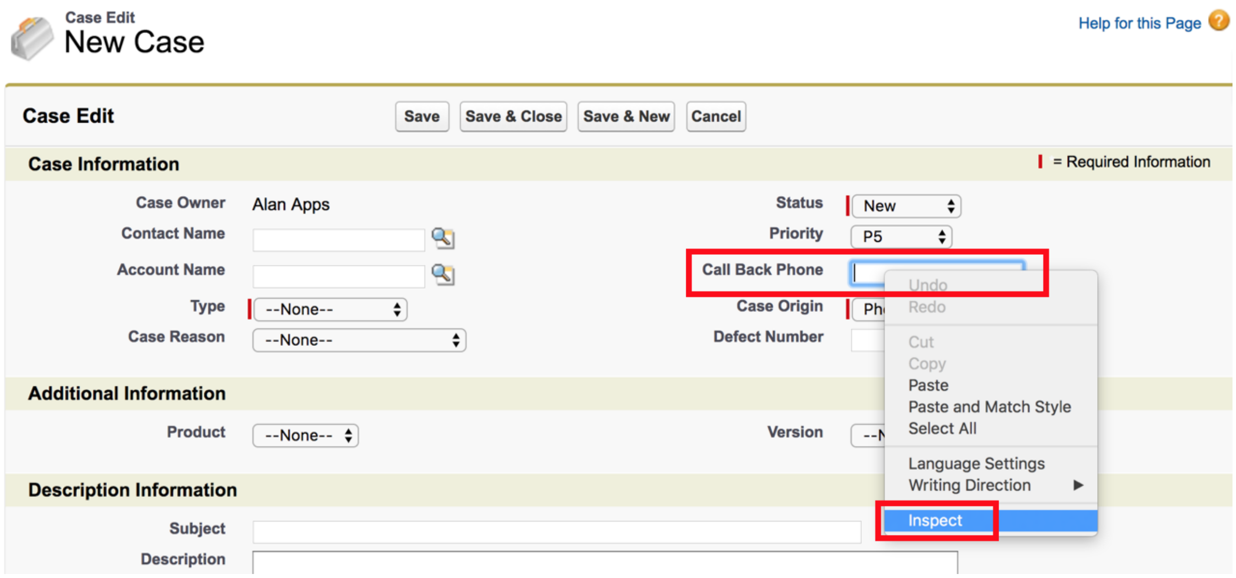
The default behavior is for the integration to search and, if found, pop the matching record as soon as the phone starts ringing. In some use cases, it is preferable to delay the search and pop function until the call is answered. For example, if the call presents to multiple extensions in a simultaneous ring pattern (a hunt group), it is better for the caller’s information to only pop for the agent that answered the call rather than on every workstation in the group. To enable this delayed search, enter:

"SearchOnConnect":true

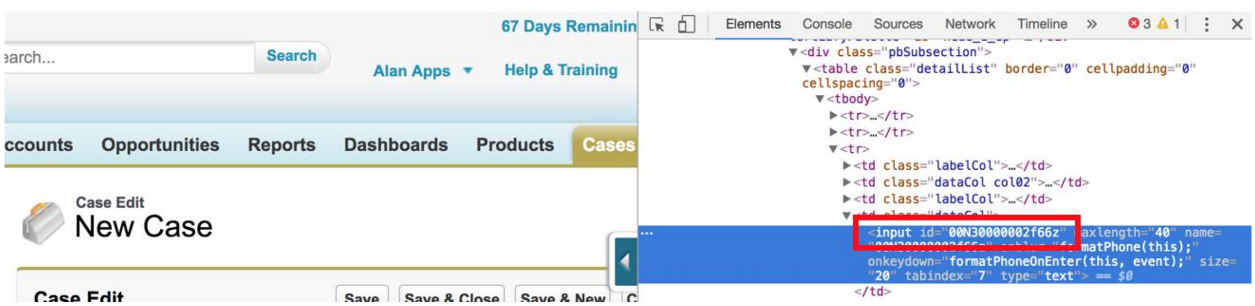
This option allows you to make the integration auto generate a new case if the incoming call phone number matches a number on an account. The configuration optionally allows you to populate fields on the new case form.

"AutoCreateCase": {"Enabled": true,"Fields": {"MitelPageField1": "MitelField1", "SalesforcePageField2": "STProperty(_ST_PROP1)"}}

The SalesforcePageField refers to the web page field name on the new case page, not the database field name. In the following example, we want to populate the custom field called “Call Back Number”. Right click on the desired field and select Inspect.



This will reveal the underlying field name

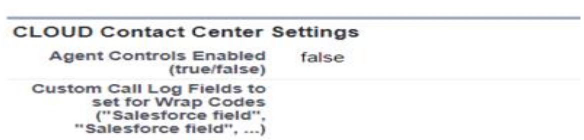


To populate the field with the incoming phone number, we will use the field “conn-num” (see page 26-27 for a list of available fields). Here is our configuration:

"AutoCreateCase":{"Enabled":true, "Fields":{"00N30000002f66z":"conn-num"}}

Note: “AutoCreateCase” is not supported in the Lightning interface.

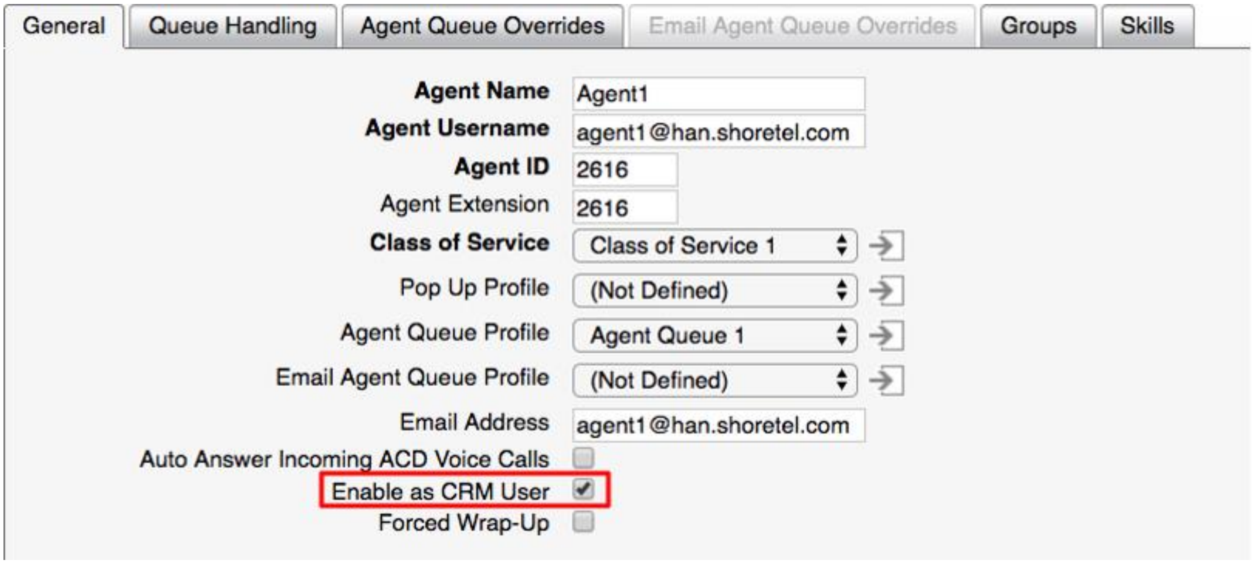
Cloud Contact Center Settings



Agent Controls Enabled (true/false)

This setting turns the Contact Center component On and Off on SFDC.

Note: Along with this field you must select the **Enable as CRM User** checkbox on the General tab of the Connect Center Director for the agent profile.



Custom Call Log Fields to set for Wrap Codes (“Salesforce field”, “Salesforce field”, …)

If you want to capture the Contact Center Wrap codes selected for a call into the Salesforce Activity history (completed task), you can enter one or more activity custom fields in a list separated by commas. Each custom field contains a wrap code associated with it.

For example:

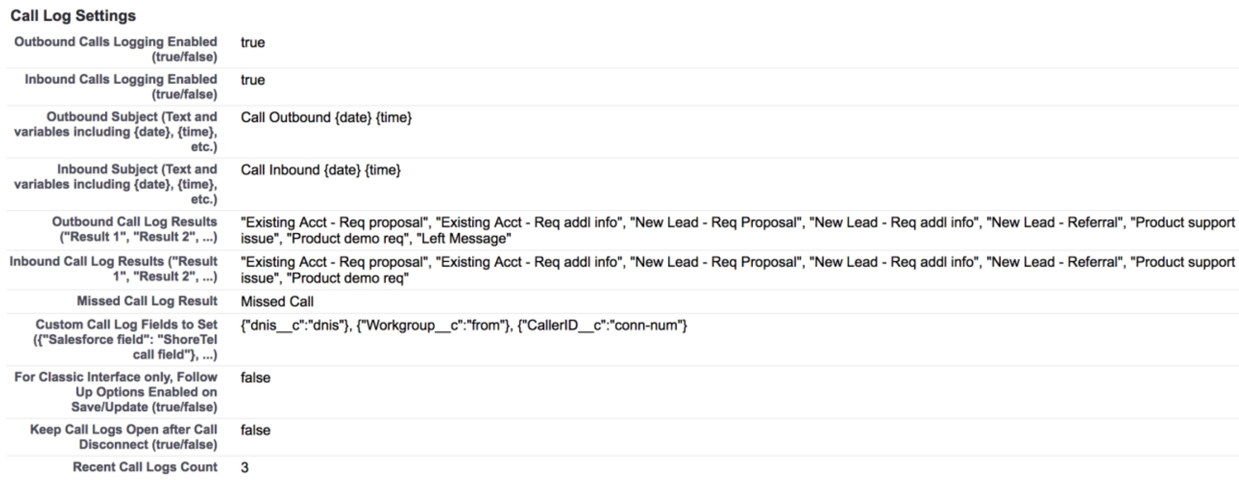
Use case:

The agents in company XYZ select 2 or 3 wrap codes per call. The Salesforce administrator has created 3 custom fields in the Activity object: CCWrap1__c, CCWrap2__c, and CCWrap3__c.

These custom fields are added to the **Custom Call Log Fields to set for Wrap Codes** in the following format:

Custom Call Log Fields to set for Wrap Codes: "CCWrap1__c", "CCWrap2__c", "CCWrap3__c"

Call Log Settings



Call Log Settings

Outbound Calls Logging Enabled (true/false)	true
Inbound Calls Logging Enabled (true/false)	true
Outbound Subject (Text and variables including {date}, {time}, etc.)	Call Outbound {date} {time}
Inbound Subject (Text and variables including {date}, {time}, etc.)	Call Inbound {date} {time}
Outbound Call Log Results ("Result 1", "Result 2", ...)	"Existing Acct - Req proposal", "Existing Acct - Req addl info", "New Lead - Req Proposal", "New Lead - Req addl info", "New Lead - Referral", "Product support issue", "Product demo req", "Left Message"
Inbound Call Log Results ("Result 1", "Result 2", ...)	"Existing Acct - Req proposal", "Existing Acct - Req addl info", "New Lead - Req Proposal", "New Lead - Req addl info", "New Lead - Referral", "Product support issue", "Product demo req"
Missed Call Log Result	Missed Call
Custom Call Log Fields to Set ({"Salesforce field": "ShoreTel call field"}, ...)	{"dnis__c":"dnis"}, {"Workgroup__c":"from"}, {"CallerID__c":"conn-num"}
For Classic Interface only, Follow Up Options Enabled on Save/Update (true/false)	false
Keep Call Logs Open after Call Disconnect (true/false)	false
Recent Call Logs Count	3

Log Outbound Calls (true/false)

This setting controls whether the softphone will create a Call Log for the call in the Softphone in response to outbound external calls. It should be set to either ‘true’ or ‘false’.

Log Inbound Calls (true/false)

This setting controls whether the softphone will create a Call Log for the call in the Softphone in response to inbound external calls. It should be set to either ‘true’ or ‘false’.

Outbound Subject (Text and variables including {date}, {time}, etc.) and Inbound Subject (Text and variables including {date}, {time}, etc.)

This setting controls the subject generated for outbound and inbound calls respectively. Each is a combination of static text plus variables that is replaced with information associated with the call and the related Salesforce entities. The following variables are supported:

Variables	Description
{date}	Indicates the date the call started, for example 10/23/2013.
{time}	Indicates the time the call started in 12 hour format, for example 2:23 PM.
{time24}	Indicates the time the call started in 24 hour format, for example 14:23.
{phone}	Indicates the phone number of the caller or called party such as (203) 261-1234.
{length}	Indicates the length of the call in seconds. Note that this field is not set until the call is disconnected.
{name}	Indicates the Salesforce entity name (typically a Contact, or Lead) associated with the call. Note that this field is not set until the call log is saved.
{nametype}	Indicates the Salesforce entity type, for example, Contact, or Lead. Note that this field is not set until the call log is saved.

{relatedto}	Indicates the Salesforce entity this call is related to. For example, an Account. Note that this field is not set until the call log is saved.
{relatedtotype}	Indicates the Salesforce entity type that this call is related to. For example Account, Case, and other entity types. Note that this field is not set until the call log is saved.
{callresult}	Indicates the call result set for the call. Note that this field is not set until the call log is saved.

Table 5

For example,

A subject of “Call {date} {time} {phone} {length} {name} {relatedto} {callresult}” might be converted to “Call 10/24/2013 9:10 AM (650) 450-8810 21 Contact: Liz D'Cruz Case: 00001023 Outbound Call Result 2”.

Inbound Call Log Results (Result 1, ...)

If set, this setting causes the softphone to display the call result selection control as part of the call log for inbound external calls. This allows the user to categorize the nature or outcome of the call, which can then drive reports or dashboards. The specific results can be specified as a list of enclosed quotes separated by commas. For example, to specify three call results, Inbound Call Result 1, Inbound Call Result 2, and Inbound Call Result 3, you would set this value to:

“Inbound Call Result 1”, “Inbound Call Result 2”, “Inbound Call Result 3”

Refer to Usage | Making a phone call section for its usage.

Outbound Call Log Results (Result 1, ...)

If set, this setting causes the softphone to display the call result selection control as part of the call log for outbound external calls. This allows the user to categorize the nature or outcome of the call which can then drive reports or dashboards. It has the same format and function as the Inbound Call Log Results setting. Refer to Usage | Answering an external incoming call section for its usage.

Missed Call Log Result

This setting controls whether the softphone will create a Call Log for the call in the Softphone in response to inbound external calls that are not answered. If call logs are desired for missed calls, this field should be set to a phrase to be used as the Call Result for unanswered inbound calls. For example, if the Missed Call Log Result is set to “Missed Call,” then call logs will be created when unanswered inbound calls disconnect, and the result will be automatically set to ‘Missed Call’. The call log will be automatically closed regardless of the setting of the “Keep Call Logs Open after Call Disconnect”. Refer to Usage | Missing an external incoming call section for more details.

If no call log is desired for missed calls, the field should be left blank.

> **Note:** Missed calls will only be logged when the user is logged into Salesforce. As such, the intent of this function is to log calls when the user has stepped away from their desk so that they can return the call when they return.

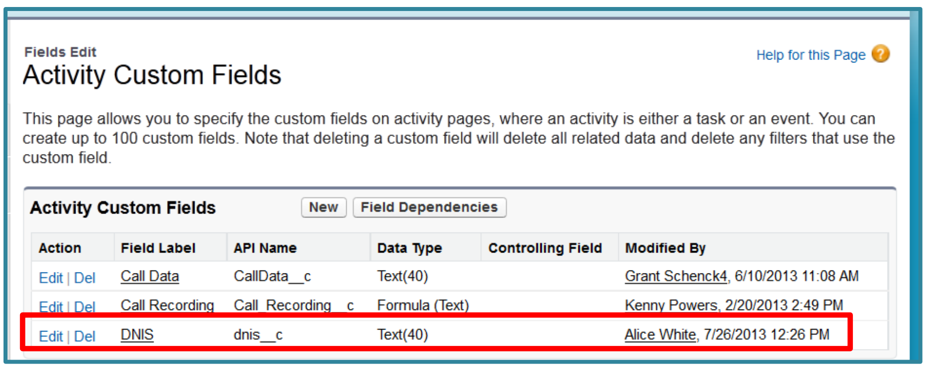
Custom Call Log Fields to Set ({Salesforce field: Mitel field}, …)

This allows setting custom call log field(s) to the value of field(s). The format is a quoted Salesforce field name (the field must be a defined Salesforce Task field) followed by a colon (':') followed by a call field or a call property, also in quotes. The available call fields are those shown in the Inbound Call Fields section except for caller, called, conn and from.

For example, to add a custom field named dnis__c to your Salesforce Task definition an administrator would first create the custom field at

Your Name ➤ Setup ➤ App Setup ➤ Customize ➤ Activities ➤ Activity Custom Fields ➤ New

Select "Text" for Data Type, click Next, enter Field Label, Length, and Field Name as "dnis", click Next to complete the creation of the custom field, with Salesforce API Name of dnis__c, as below:



Then, you would enter the custom field to the Softphone Custom Call Log Fields to automatically populate the field with dnis field when DNIS (dialed number) is available for the inbound call using this format:

{"dnis__c": "dnis"}

If you want to also set the custom field named accountId__c to the value of the call property named "_ST_ACCOUNT_ID" your setting would look like this:

{"dnis__c": "dnis"}, {"accountId__c": "property(_ST_ACCOUNT_ID)"}

Use "CP (name)" to store Contact Center Call Profile field values.

For example, to store the agent number in a custom field called Agent_Number__c, enter {"Agent_Number__c":"CP(Agent Number)"}.

Custom Call Log Fields to Set ({"Salesforce field": "Mitel call field"}, ...)	{"dnis__c":"dnis"},{"Agent_Number__c":"CP(Agent Number)"}

Follow Up Options Enabled on Save/Update (true/false)

This setting controls whether the softphone will immediately save or update an open call note when the save/update button is clicked or instead provide a dropdown menu of choices to update save/update the call note and optionally create a follow-up task or event. If set to true the button text will read "Save…" or "Update…" vs. "Save" or "Update" to indicate that additional input will be requested via the dropdown menu.

Keep Call Logs Open after Call Disconnect

This setting controls whether the softphone will keep call logs open after the call disconnects or, for workgroup calls, after the agent moves back to ready-for-calls. It should be set to either ‘true’, ‘false’ or ‘save’.

- **true** – The call log will stay open in edit mode and offer the user the option to [Save] which will make an entry in the Salesforce Activity History or [Discard] which will delete the call log and not make an entry in Salesforce.
- **false** – The call log will automatically close and create the Activity History entry in Salesforce. The user will still have the option to edit the call log notes and other settings by clicking the pencil icon. If they click the pencil icon, the options will be [Update] to update the Activity History entry already created in Salesforce or [Cancel] to close the log and disregard any changes made.
- **save** – The call log will automatically close and create the Activity History entry in Salesforce. However, the call log will stay open in edit mode with the options [Update] to update the Activity History entry already created in Salesforce or [Cancel] to close the log and disregard any changes made.

Recent Call Logs Count

This setting controls the maximum number of recently closed call logs that will be shown in the softphone. It should be set to a number between 0 and 10. These call log titles show up under Last n Calls, at the bottom of the softphone under any active calls and their call logs. Please note that this count will be ignored if the number of open call logs is greater than this value. Users should save their call logs in a timely fashion in order to avoid having lots of call logs cluttering up their user’s interface. If a call log is discarded, then it will not be shown.

Advanced Call Log Settings

> **Note:** These settings require the optional Apex class STPSSoftphone be installed in the customer’s organization.

Advanced Call Log Settings - Note: These settings require the optional Apex class STPSSoftphone be installed in the customer's organization.

Record Type	
Outbound Call Input Fields (fieldname[*][=ShoreTel Field], ...)	Group__c, Urgent__c, ActionPlan__c
Inbound Call Input Fields (fieldname[*][=ShoreTel Field], ...)	Group__c=property(_STCC_Group), Urgent__c="True", ActionPlan__c="Do Something"

These settings are only available when the customer is using the 5.1+ version of the Call Center settings. If your organization Mitel Adapter’s Call Center settings do not show this section, then you will need to import and configure the current 5.4 version of the Call Center XML. In addition to the 5.4 version of the Call Center settings, the customer will also need to install Apex classes required to support these optional features discussed earlier in this guide.

Record Type

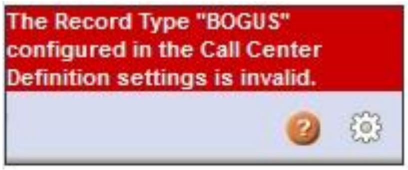
This field is used to enter the optional name of a Task Activity Record Type to be used by the adapter.

If set, this Record Type is used for two purposes:

- The Activity Task’s RecordType field is set to the value when the record is saved. This is optional. If left blank, the RecordType will default to “Call”.

- Any picklist displayed in the call note UI that are tied to Task Activity fields (see the next two settings) will be filtered to only show the valid values based on the Record Type. In addition, the default choice for the picklist will reflect the Record Type specific default if any.

Note that if an invalid Record Type is specified the adapter will not function and will display an error until corrected:



Outbound Call Input Fields (fieldsname[*][=Mitel Field], …)

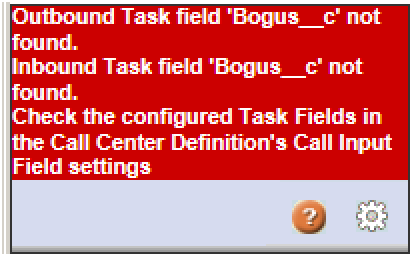
This allows Call Notes for outbound calls to show and allow the editing of additional Task Activity fields beyond the standard Subject, Comment, Name, Related To and Call Result and have those settings saved as part of the call note. Specifically, essentially any Task Activity field can be shown in the Softphone's Call Note pane. This includes both standard and custom fields.

Currently this support is limited to the following Salesforce field data types:

- Text - Shown as text edit fields when the note is in edit mode and or as text strings with ellipsis if needed when the note is not in edit mode. The current Subject is an example of a how a string field would be handled.
- TextArea - Shown as five line edit fields when the note is in edit mode and as text strings with ellipsis if needed when the note is not in edit mode. The current Comment field is an example of how a textarea field would be handled.
- Checkboxes - Shown as check boxes in edit mode and as a display only checkbox in view mode.
- Picklist - Shown as multi-selection dropdowns when the call note is in edit mode and as a text string with ellipsis if needed when the call note is not in edit mode. The current Call Result field is an example of a how a picklist field would be handled. Note that the choices shown in the picklist may be filtered based on the Record Type setting if set.
- DateTime - Single field that contains both the date and time.
- Date - Accepts a date value. Note that it will not show the calendar widget.
- Number

Note: Some field types are not supported such as Date fields and Dependent Picklists.

When set this setting consists of one or more Salesforce Task Activity field names separated by commas. The fields are shown in the order entered at the bottom of the softphone's call note panes under the Call Result fields. If a field entered does not match a known field in the customer's task activity record then the adapter will not function and will display an error until the settings are corrected:



In addition to determining which fields are valid Task fields, the softphone will also determine the valid picklist values, the default value for fields, the help for field (displayed as a popup when hovering over a field when the call note is in edit mode) and for Text and TextArea fields, the maximum allowed length. Note however that due to limitations of the Salesforce Apex API we cannot determine the default value for Checkbox fields. Checkbox fields will always default to false (unchecked). However, see below for the syntax that allows setting of default values through this setting.

In addition, the syntax of this setting allows one or both of two additional aspects to be controlled:

- Required by the Softphone:
  If a field is required by Salesforce then the softphone will always require that users enter the field before the record can be saved. However, if the field is not a required field then optionally, it can be configured as required by the softphone. To do so, an asterisk character ('*') is appended to the end of the name. For example, if a custom field named "Life_Story__c" was being shown and you wanted to make it required by the softphone you would enter "Life_Story__c*" as the field name.
- Default value:
  If a field has a default value defined in Salesforce then this value will be used as the initial value of the field when the call note is shown. However, via this setting's syntax it is possible to provide a different default setting. To do so you would append and equal sign followed by the value of the field. This value can be any of the valid fields listed above in the section describing the Inbound Call Fields or it can be a specific value enclosed in double quotes. For example, if you wanted to show a Task Checkbox field named 'Workgroup_Call__c' and have it default to true you would add this to the list of fields: 'Workgroup_Call__c="true"'. If a default value is used in conjunction with the required asterisk, the equal sign should follow the asterisk.

Call Log Field Example

As an example, this shows an example setting for the Outbound Call Fields:

ACCOUNT__c*=property(_ST_ACCOUNT), Income_Range__c="$100K or more", Life_Story__c*, Workgroup_Call__c="true"

From the Salesforce setup's Activity Fields pane we see the fields in question:

Activity Custom Fields New | Field Dependencies

Action	Field Label	API Name	Data Type
Edit | Del	Account ID	ACCOUNT__c	Text(10)
Edit | Del	Call Recording	Call_Recording_del__c	Formula (Text)
Edit | Del	DNIS	DNIS__c	Text(20)
Edit | Del	GUID	GUID__c	Text(40)
Edit | Del | Replace	Income Range	Income_Range__c	Picklist
Edit | Del	Life Story	Life_Story__c	Text Area(255)
Edit | Del | Replace	Outcome	Outcome__c	Picklist
Edit | Del | Replace	Role	Role__c	Picklist
Edit | Del	Workgroup Call	Workgroup_Call__c	Checkbox

This is configured to show four fields:

- **ACCOUNT__c*=property(_ST_ACCOUNT):** This is a Text field. Because of the asterisk, there should be a value before the note can be saved. The last part is setting its initial value to the contents of the Call property named _ST_ACCOUNT that may be attached to the call.
- **Income_Range__c="$100K or more":** This is a Picklist field. The default value is set to "$100K or more".
- Life_Story__c*: This is a TextArea field. Because of the asterisk, there should be a value before the note can be saved.
- Workgroup_Call__c="true": This is a Checkbox field. The default value is set to true (checked).

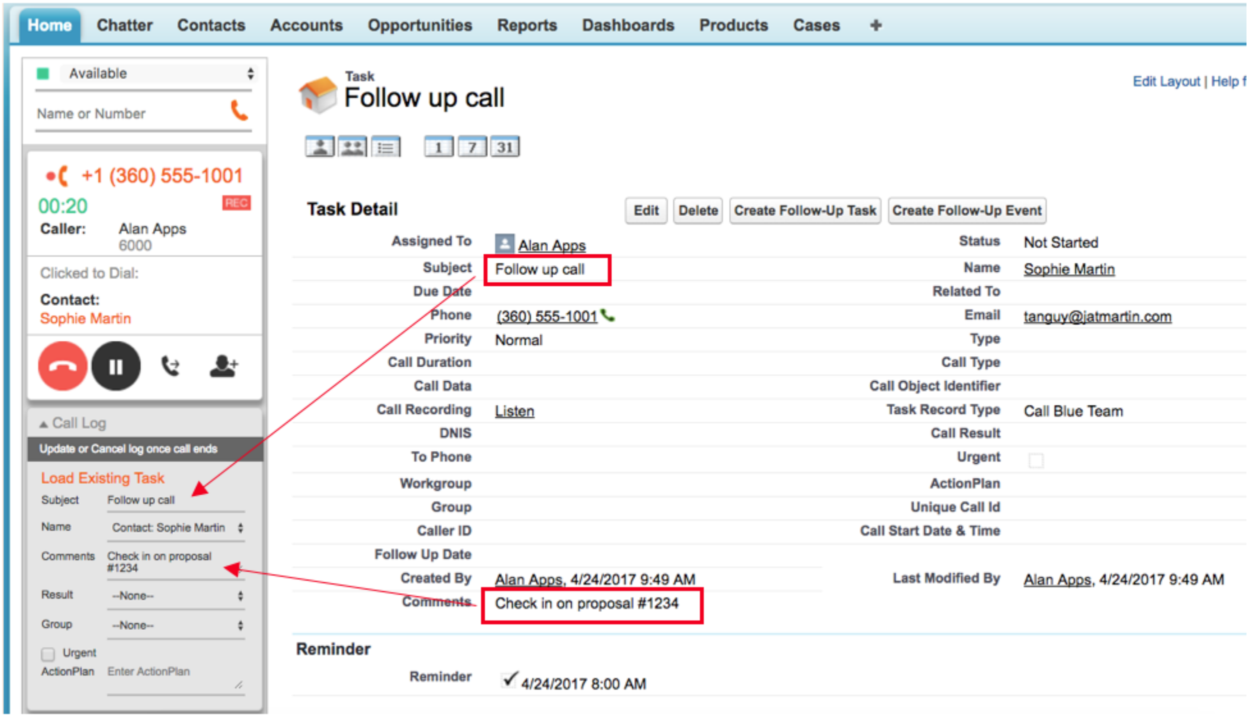
Outbound Call Input Fields (fieldsname[*][=Mitel Field], …)

This field is the same as the Input Call Input Fields setting except it controls the fields editable and shown for outbound vs. inbound calls.

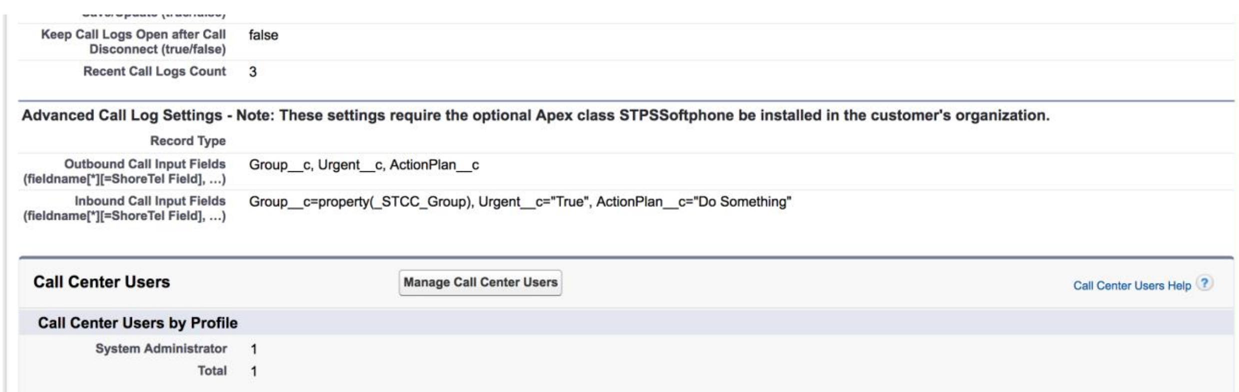
Enhanced Task Activity/Call Note Integration

When the Apex package is installed, in addition to the features configured here and the Application Integration features described in Appendix B, two additional capabilities are enabled which integrate Task Activities with the Softphone Call Notes:

- Calls placed from an Open Task Activity will open a call note showing details of the existing Task's details instead of creating an empty call note. The user will be able to update instead of saving any changes they make. This feature allows a user to initiate a call from an open task and close out the task automatically once the call ends.
- While on a call the call note area will show a "Load Existing Task" button that if clicked will check if the current page is an open Task Activity and if so, load the details from the Task into the call note as shown here:



Manage Call Center Users



This screen capture shows the total number of users assigned to use this call center. Click Mange Call Center Users to show who are the users currently using this call center definition and to allow administrators to assign users to or remove users from this call center. To switch a user from an existing call center to a new one, you will need to first remove the user from the existing call center and then assign him or her to the new one.

Alternatively, an administrator can reassign a user's call center at the user side by:

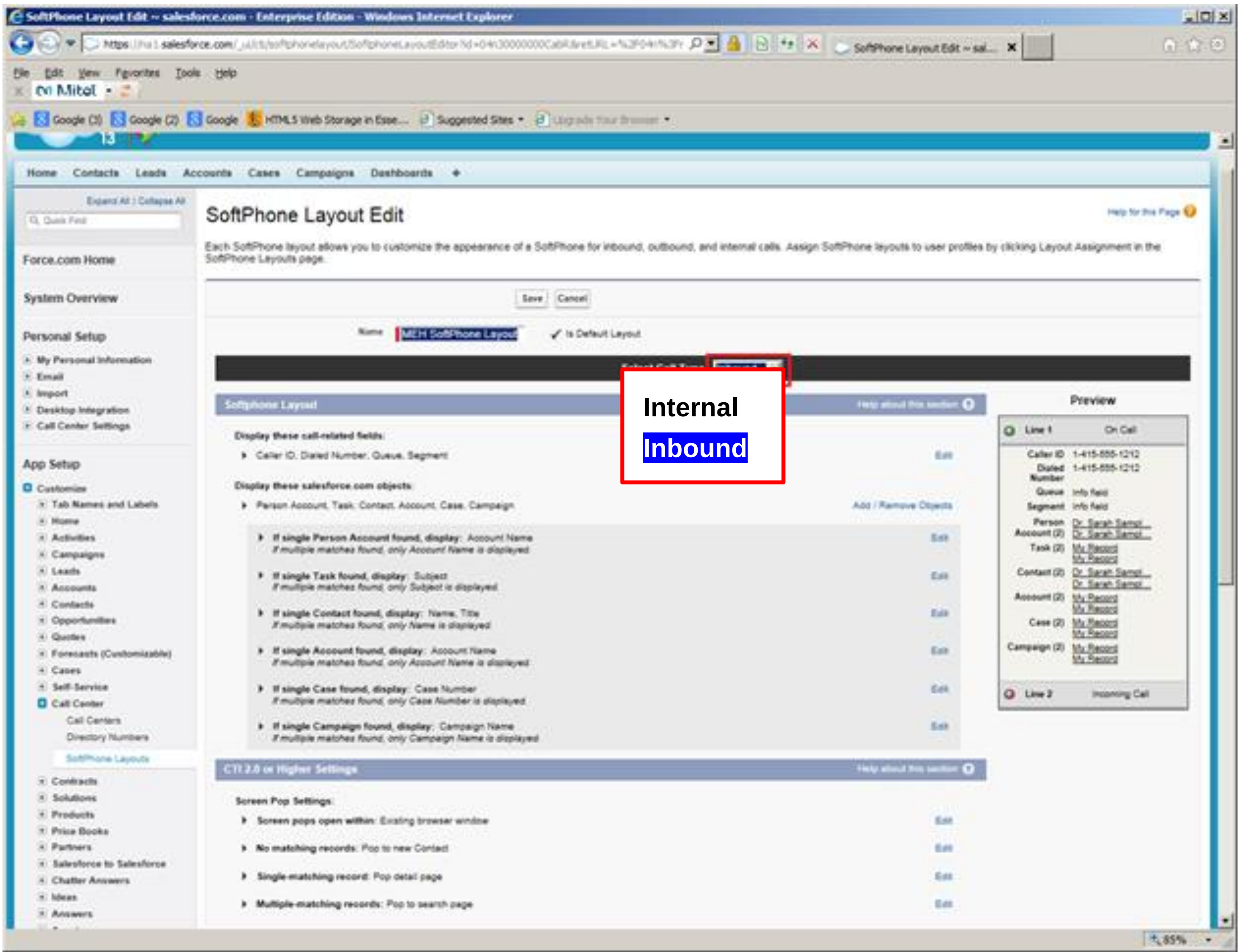
Click Manage Call Center Users ➤ User's Full Name ➤ Edit User Detail ➤ modify the "Call Center" field with the Lookup function.

Softphone Layouts

To work with the softphone layouts:

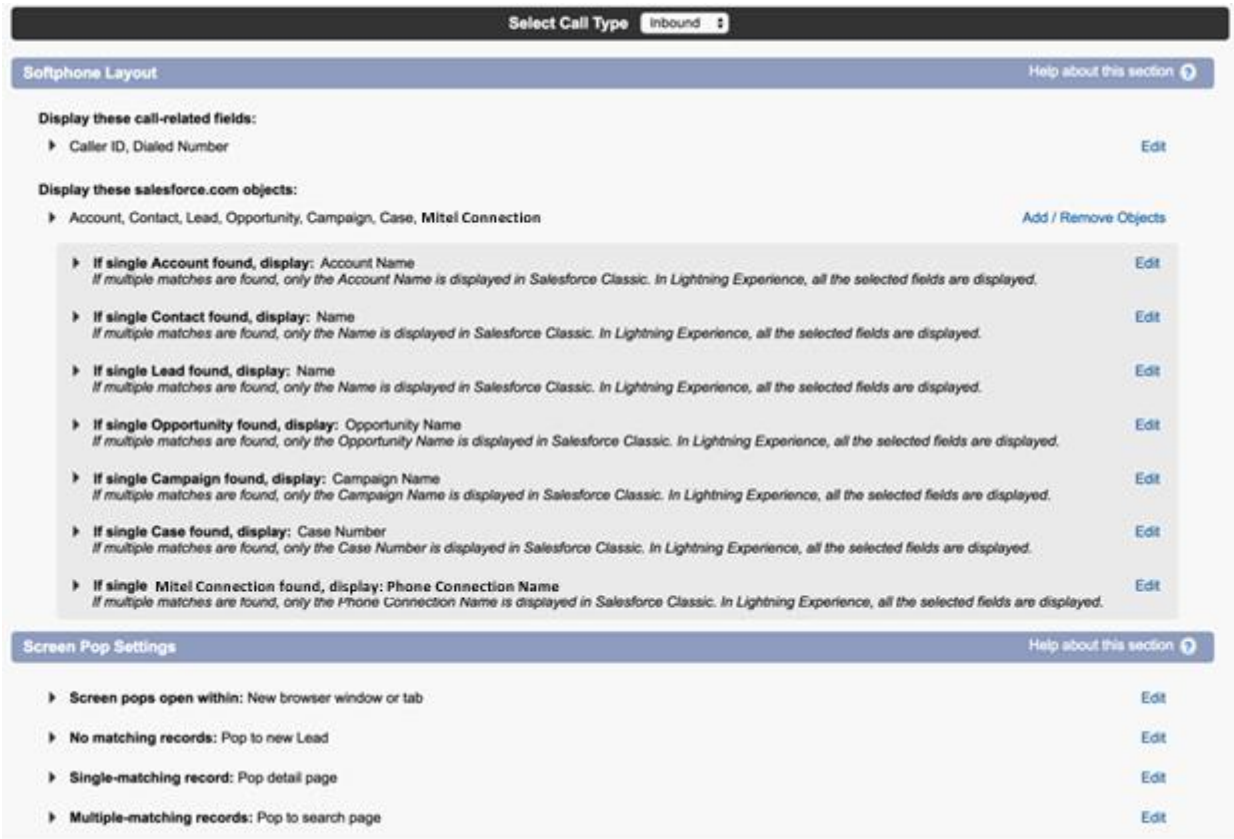
Click Your Name ➤ Setup ➤ Customize ➤ Call Center ➤ SoftPhone Layouts ➤ Edit.

You should have a softphone layout but if not, select New to create one. Screenshot below displays a sample softphone layout for inbound calls with Select Call Type set to Inbound:



For inbound calls, there are Softphone Layout shown at the top and Screen Pop Settings at the bottom. The Mitel Softphone User Interface and Layout for a given user is controlled by a combination of the Call Center Definition Settings and the Softphone Layout settings assigned to that user. There are different softphone layout settings for Internal, Inbound, and Outbound calls via the Select Call Type dropdown window. Only the layout for inbound calls provides access to the Screen Pop Settings. The Softphone Layout section described below is the same for Inbound and Outbound call types. Internal call type has a similar but shorter softphone layout.

Softphone Layout:

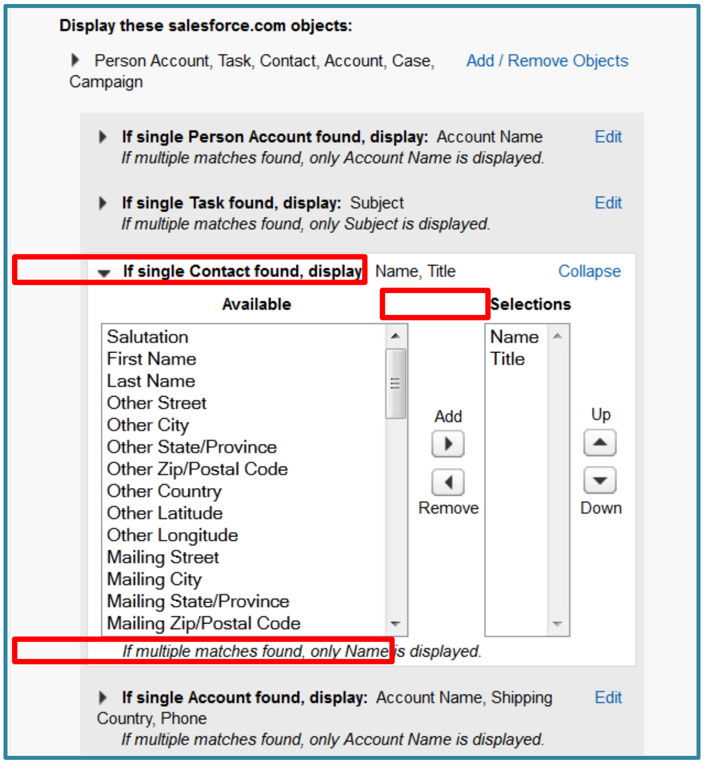


Display these call-related fields:

This setting is not used. The display fields are controlled by the Call Center's Inbound and Outbound Call Fields settings.

Display these Salesforce objects:

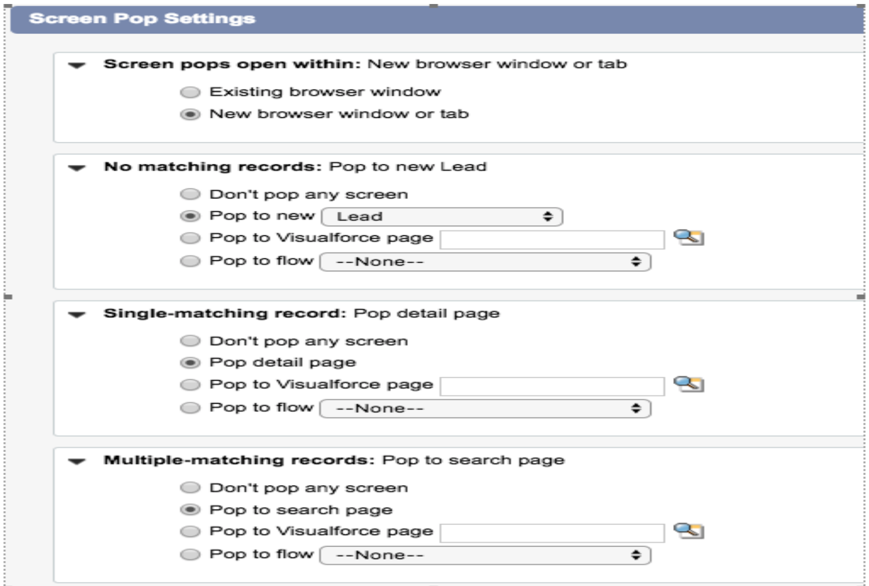
These settings control which Salesforce objects are searched and potentially displayed if a match is found. For each object, a default field is shown if multiple matches are found. If a single match is found the user can configure which fields they wish to show. In general, you should ensure that you use the default field as the first or only field displayed if a single match is found. Softphone tries to display all selected objects with values for single match. Note that the order of the objects and the order of each objects fields controls the related aspect of the softphone display, and in the backend, also controls the order of the search criteria of Salesforce search. Any change in the Selections section will be reflected in the next softphone display. However, the change in the search criteria will take 30 seconds or more to take effect.



> **Note:** While you can add the User to be searchable for internal calls, Salesforce's current search does not find records with matching numbers in the extension fields. This means that if you get an internal inbound call from an internal party, the corresponding caller will not be found even if the caller's extension is set for the user. You can set the caller's extension in another phone field including a custom phone field and the search will find it and screen pop will work on internal inbound call.

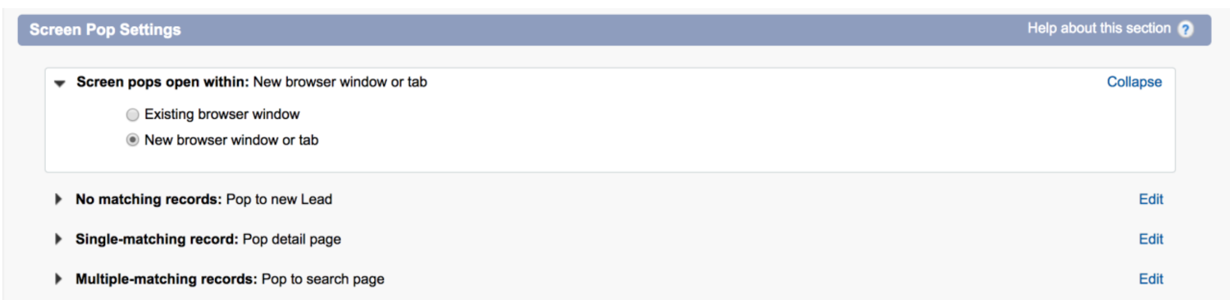
Screen Pop Settings:

These settings control some additional aspects of the user interface with regards to external inbound calls as Select Call Type is set to Inbound.



Screen pops open within:

This allows the configuration of how the application responds to a new external inbound call, specifically if the screen pops to a new browser or tab or to the current browser.

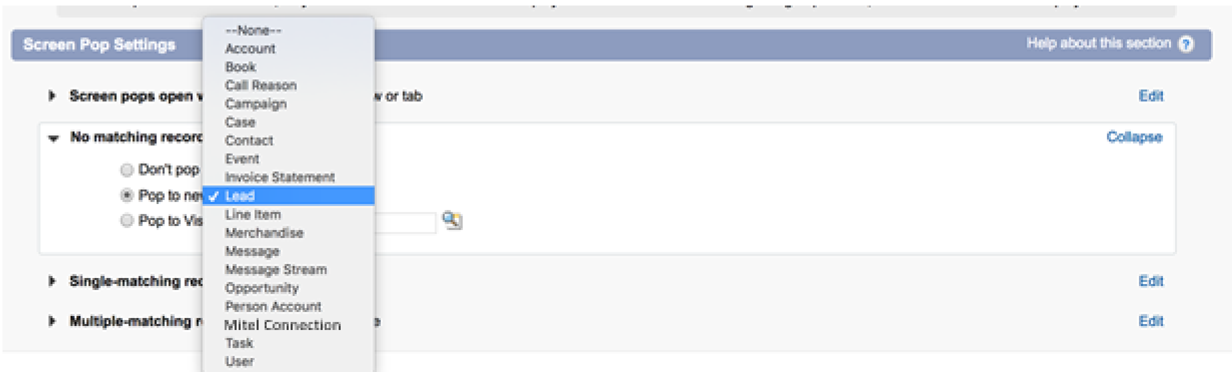


> **Note:** Popping to the existing browser window may cause you to lose unsaved work. If you select the option to pop in a new browser window or tab, the tab you were on will be left unchanged. In version 5.4.x, you may now open unlimited numbers of tabs.

No matching records:

This controls how the softphone responds if there is no match for an external inbound call. The options are:

- Don't pop
- Pop to a specific new entity page such as a Contact, or
- Pop to a Visualforce page
- Pop to Flow



Single-matching record:

This controls how the softphone responds if there is one matching record for an external inbound call.

The options are:

- Don't pop
- Pop to a detail page, or
- Pop to a Visualforce page
- Pop to flow

When popping a page, all call information and call properties are passed as query parameters with the URL. The possible query parameters set will depend on the information associated with the call and can include all of the items listed above in the Settings | Inbound Call Fields ({"label": "Mitel call field"}, {…}) section above. In addition to those listed, two additional properties may be set to support existing Visual Force page CTI conventions.

They are:

- **ANI:** The same as the 'conn-num' field.
- **DNIS:** The same as the 'dnis' field.

This Salesforce link explains how a Visual Force page can access the query parameters:

https://www.salesforce.com/us/developer/docs/pages/Content/pages_quick_start_query_params_getting.htm

Multiple-matching records:

This controls how the softphone responds if there are multiple matching records for an external inbound call.

The options are:

- Don’t pop
- Pop to a search page, or
- Pop to a Visualforce page
- Pop to flow

We recommend selecting the “Pop to search page” option.

Previewing SoftPhone Layouts

By default, the Preview image shows the SoftPhone layout if more than one call-related record is found. When this occurs, only the name of each record is displayed in the SoftPhone. To preview the SoftPhone layout if only one matching record is found, hover your mouse over the row that lists this object in the If an exact match is found, display these fields section.

Assigning SoftPhone Layouts to Users

To assign a custom SoftPhone layout to a user profile:

1. Click Your Name ➤ Setup ➤ Customize ➤ Call Center ➤ SoftPhone Layouts.
2. Click Layout Assignment.
3. For each user profile that appears on the page, select the SoftPhone layout that the profile should use. Profiles are only listed in this page if they include users that are currently assigned to a call center, or if they have already been assigned a custom SoftPhone layout. The number in parentheses shows the number of call center users who are assigned to that profile.
4. Click Save.

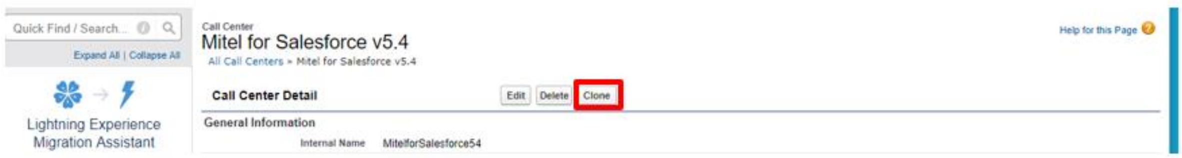
Directory Numbers

This feature is not used in Mitel for Salesforce application.

Clone Call Center Configuration

You can clone the existing Call Center configuration to create more integrations.

Click **Clone** and make the changes to the fields as required to create more Call Center integration.



Appendix A: Mitel Call Recorder Integration

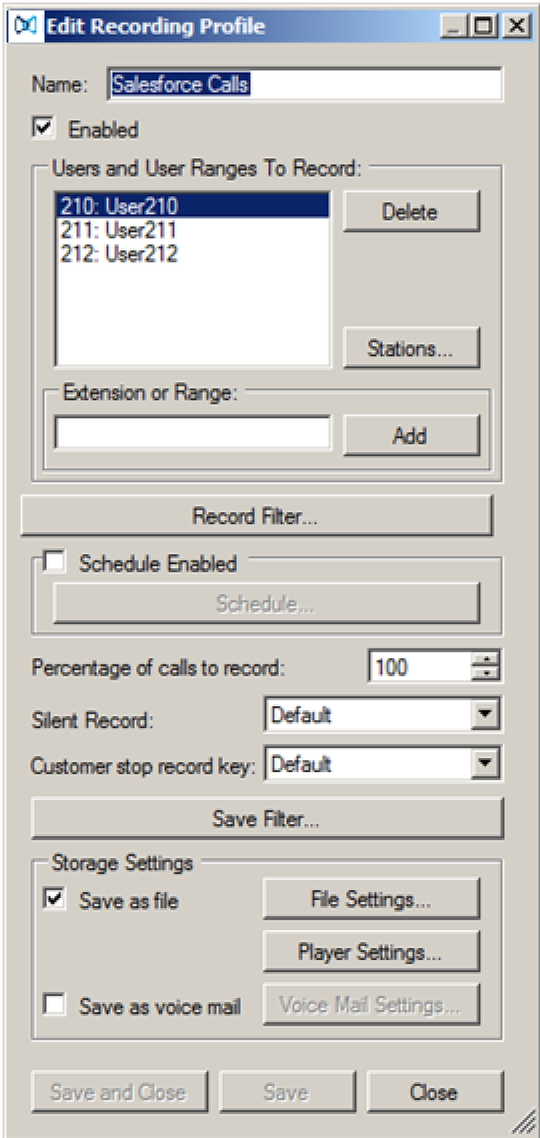
Applies to MiVoice Connect systems only.

This appendix provides instructions for customers who purchased the Mitel Call Recorder application and wish to integrate it with the Mitel Salesforce application. Specifically, if configured correctly, call notes created by this application can automatically contain a link that allows a recording of the associated call to be accessed and listened to using the Call Recorder Player web application by simply clicking within the Salesforce call note.

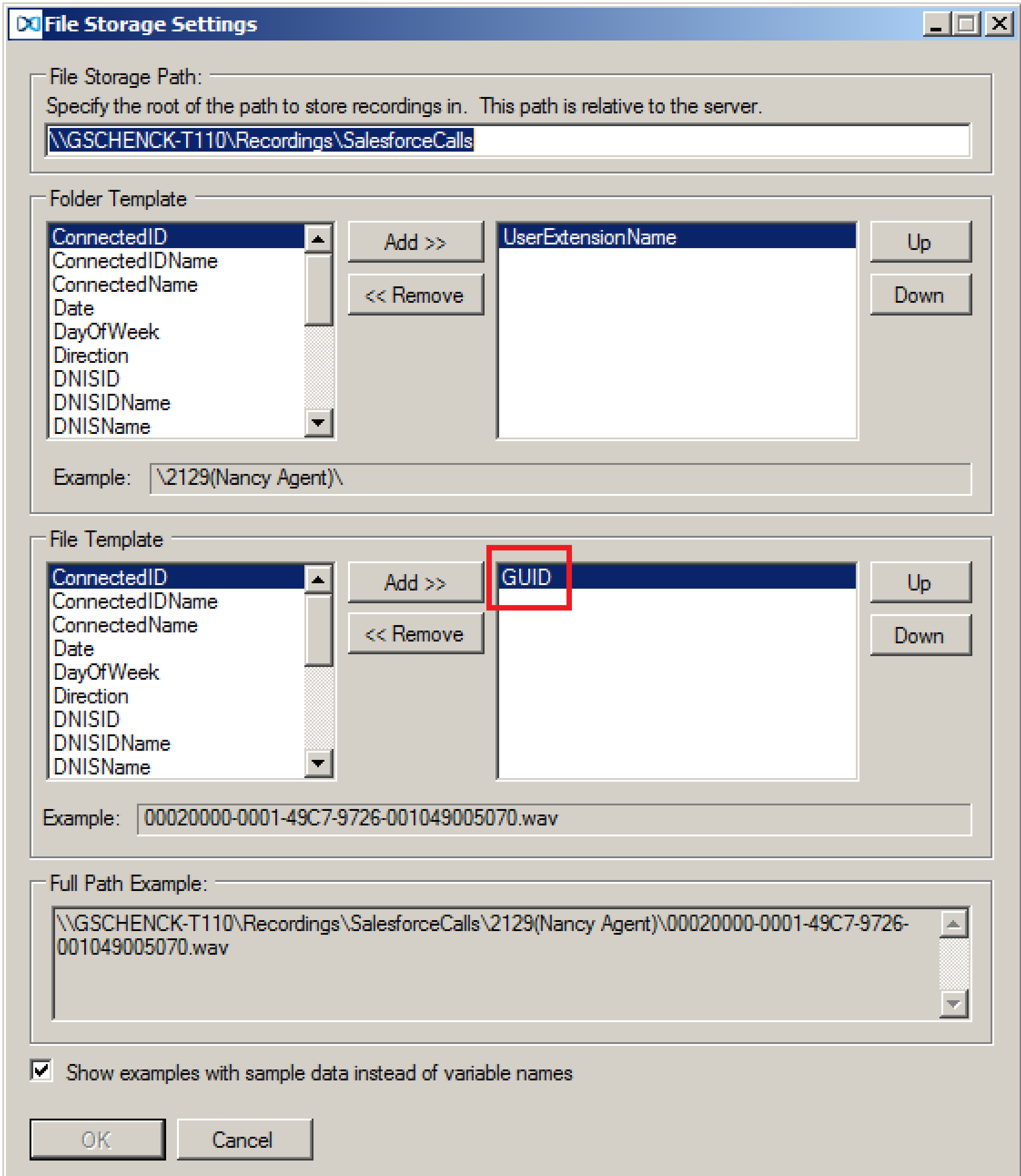
Configure the Mitel Call Recorder to Record the Calls

A key requirement for the integration to work is for the call recording made by the call recorder to include the call's GUID as part of the file name. This will allow the Mitel Salesforce client to be able to store the same GUID as part of the call activity record allowing the Call Recorder Player to be able to locate the recording at a later point. This example assumes you are creating a recording profile explicitly for recording of Salesforce calls. You could or course leverage an existing recording profile assuming it saves the call's GUID as part of the file name and that it allows users to see at least their own recordings in the player settings.

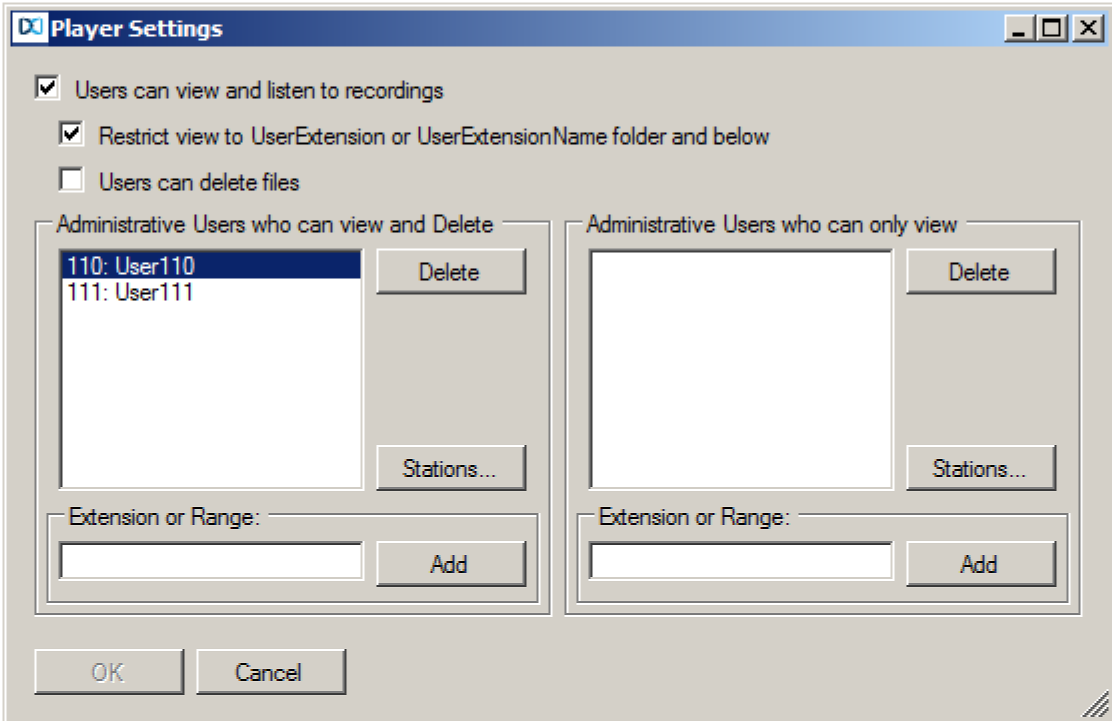
This shows the settings for a simple recording profile:



The Record Filter is set to record all inbound and outbound calls. Under the Storage Settings, the File Settings are storing each user's recordings in a folder based on the extension and name of the user and with a file name of just the call's GUID:



Finally, the player settings allow each user to see the recordings in their folder but not in other user's folders:

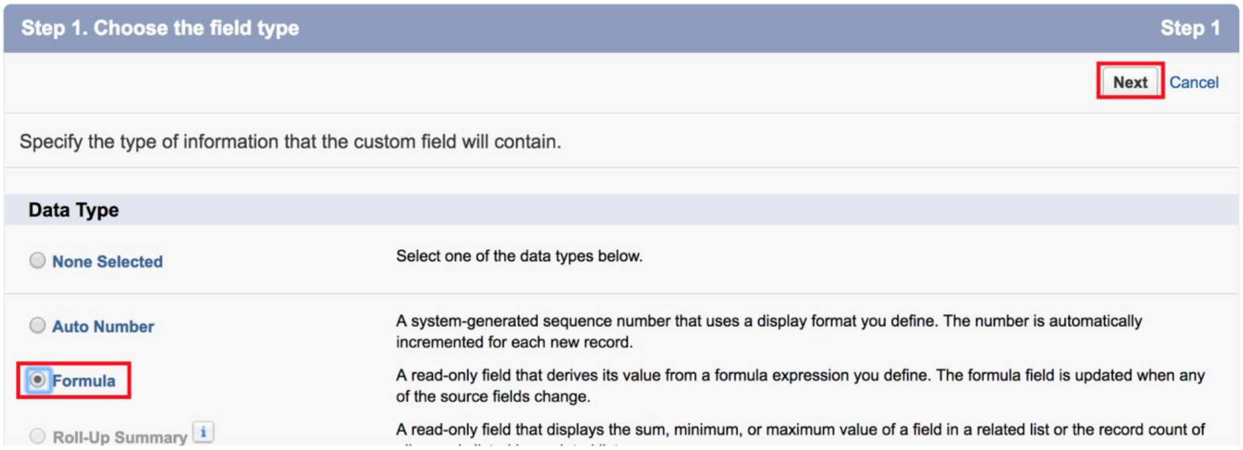


Create the Custom Field to Hold the Call Recorder Player Link

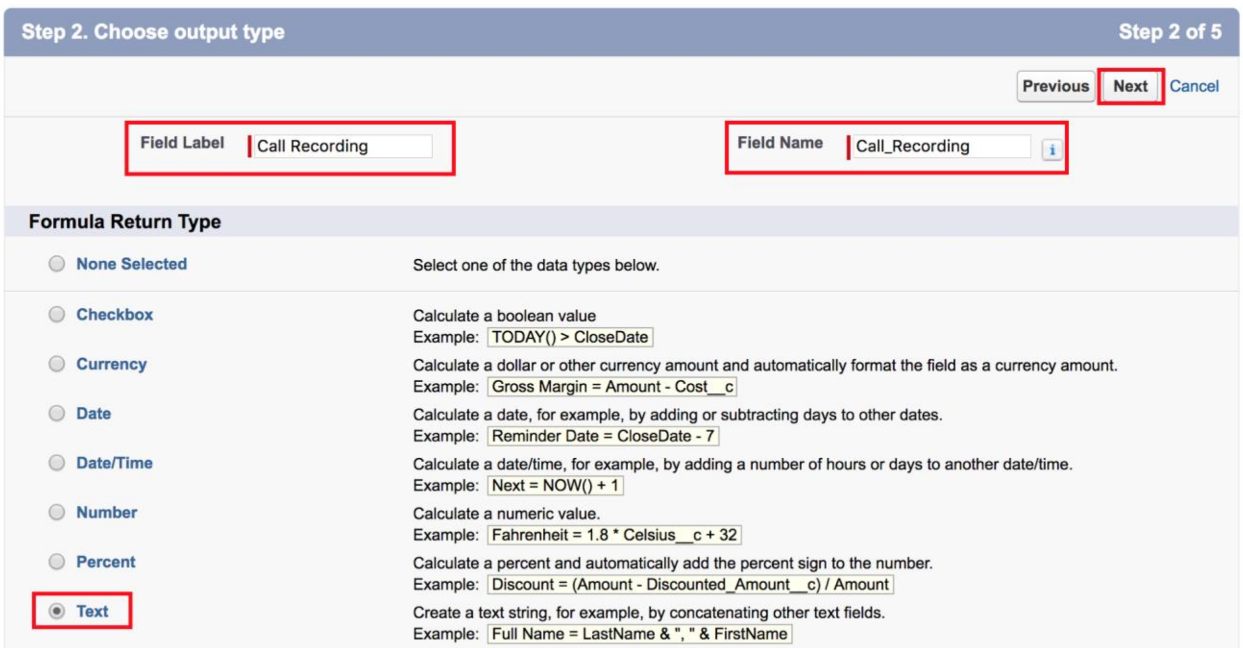
You must add a new custom field to provide a link to the Mitel Call Recorder Player to open the call recording with a GUID matching the CallObject.

1. Your Name ➤ Setup ➤ App Setup ➤ Customize ➤ Activities ➤ Activity Custom Fields ➤ New

2. Select **Formula** and click **[Next]**.



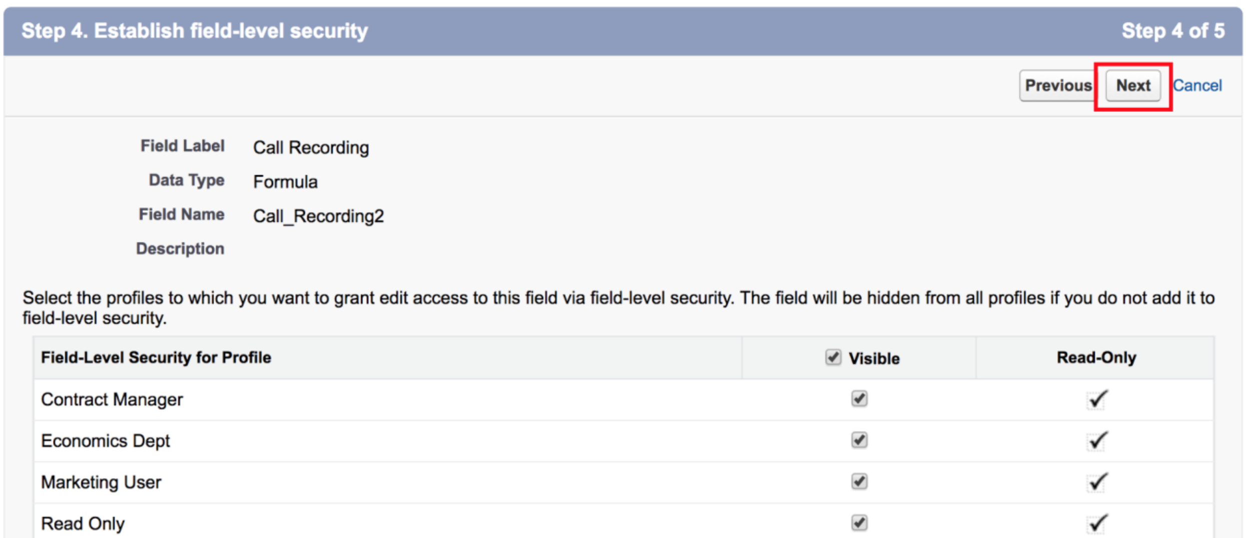
3. Set the Field Label to “Call Recording” and the Field Name to Call_Recording.
4. Select Formula Return Type as Text, and Click [Next].



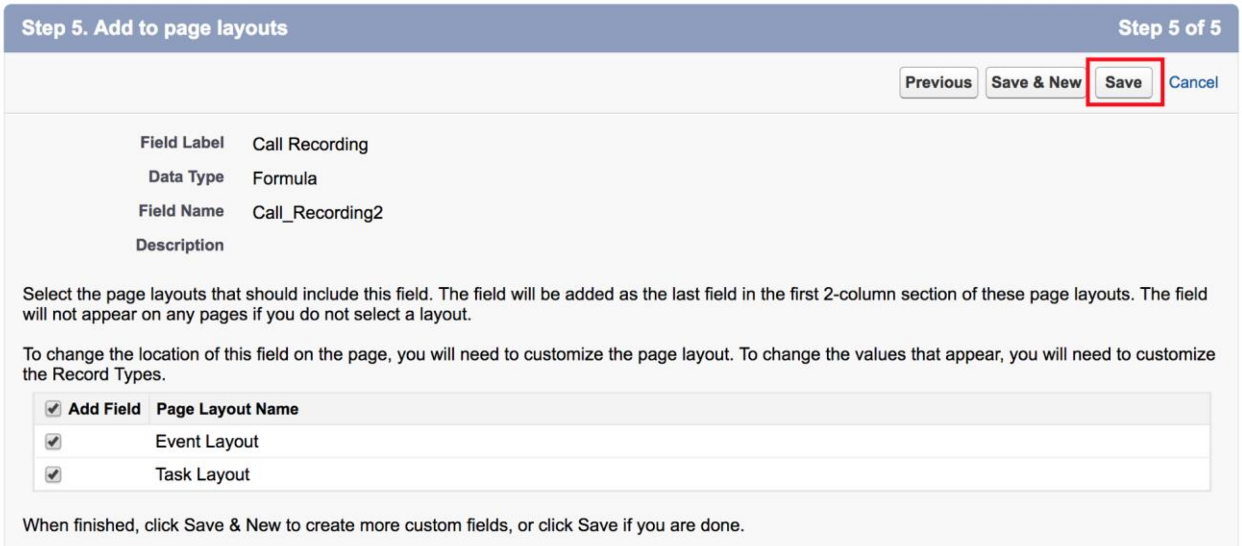
5. Enter the following formula replacing **“localhost”** with the IP or FQDN of your Mitel MiVoice Connect HQ server, and click **[Next]**.

HYPERLINK (“http://localhost/stpscallrecorderplayer?File="&CallObject,"Listen","_blank”)

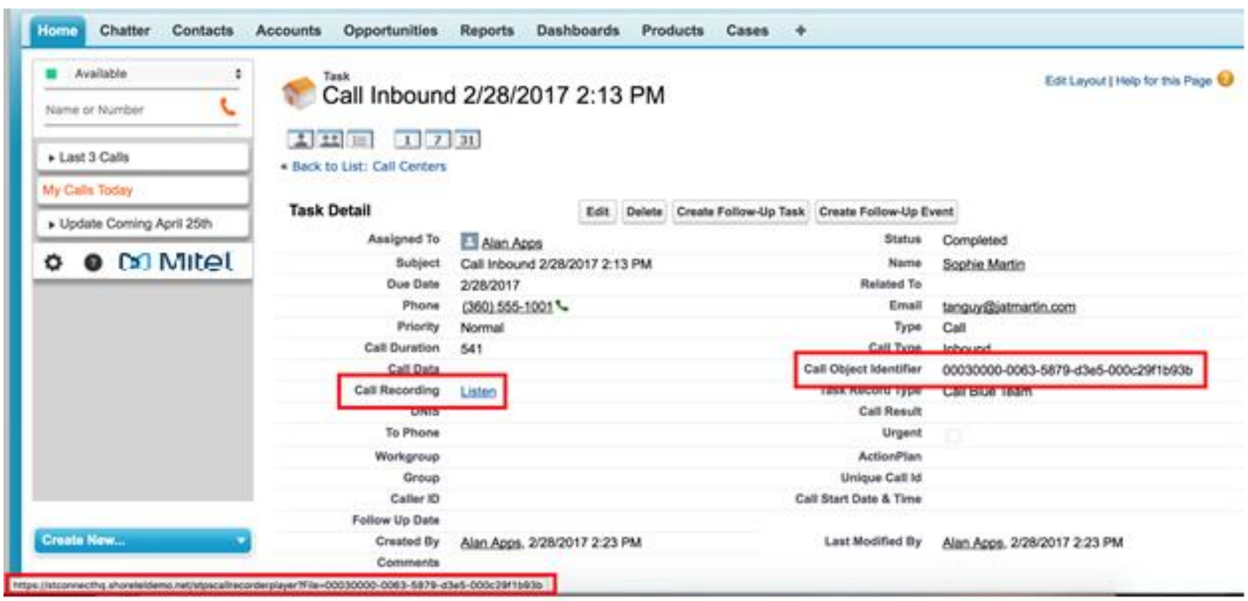
6. The default security settings are typically fine. Click **[Next]**.



7. The default page layout change is typically fine. You can edit the page layout separately, if desired. Click **[Save]**.



8. You can verify that the field has been added correctly by opening any existing call activity record and hover the mouse over the Listen link and check the URL at the bottom of the screen as shown here:



Recording Playback

If you have carried out the previous steps, you are now ready to run a test.

Now place or receive an external call to or from the user running the Mitel Salesforce Softphone. Connect the call and type a comment into the call log area of the Softphone such as “Testing”. Wait for several seconds and then hang up the call.

Locate and open the call activity record, click at the Listen link. The call recorder player should be open and if you are not currently logged in, you will need to enter your login credentials. After you log in, the player will be opened. Locate the underlying recording and play it back:


Mitel Call Recorder Player
Filter: 00030000-0063-5879-d3e5-000c29f1b93b
Apply
Clear
File: User(6000)_Direction(In)_Date(2017-02-28)_Time(14-13-26)_ConnectedID(3605551001)_GUID(00030000-0063-5879-D3E5-000C29F1893B)
Make Call
Drop Call
Folders:
localhost
Customer Service Team
6000(Alan Apps)
localhost\Customer Service Team\6000(Alan Apps)
Date and Time Saved
Length
File Name
2/28/2017 2:22:17 PM
00:08:47

Appendix B: Application Integration Features

The Mitel for Salesforce integration supports the ability to transfer a **Call Profile** value from the MiCloud Connect Contact Center to the Salesforce interface that invokes a specific record search instead of the default phone number search.

For example,

If a caller wants details regarding a case and provides you the respective case number, you can investigate about the case on Salesforce with the case number regardless of the caller ID number of the caller. Similarly, you can execute a search with the account number, customer number, or main phone number of the caller instead of the default caller ID number.

MiCloud Connect implementations

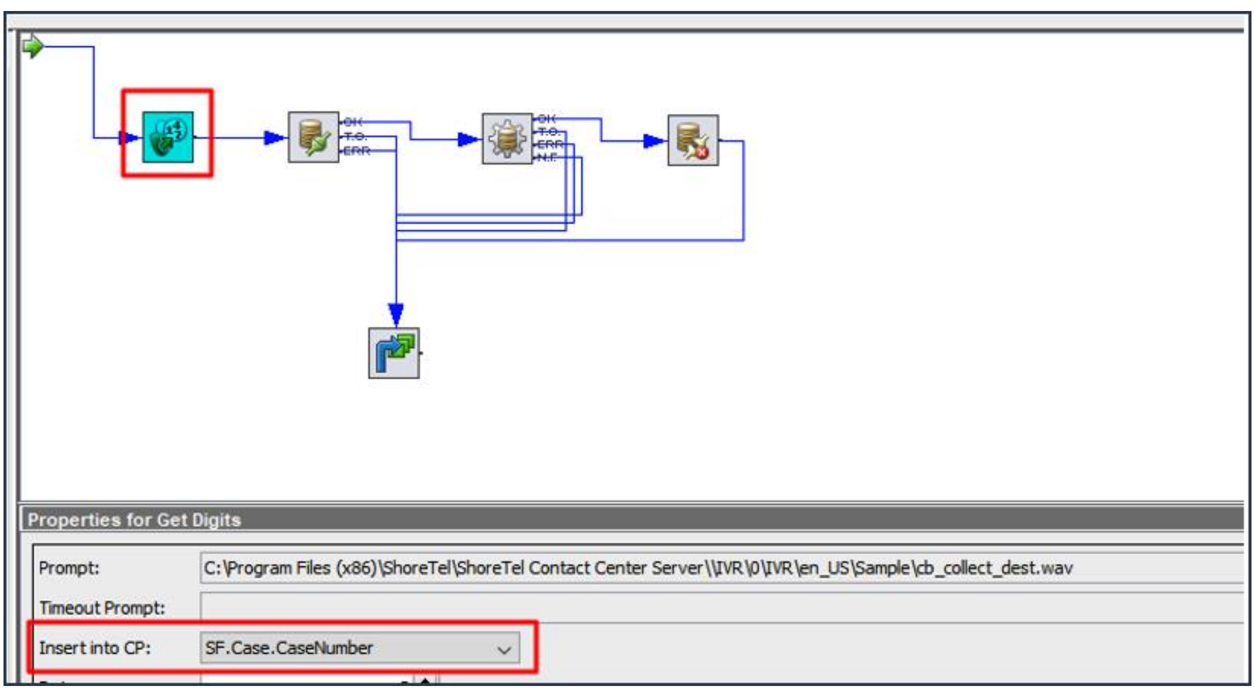
1. Define a **Call Profile** field in the MiCloud Connect Contact Center Director in the following format:

   SF.{Salesforce_object_name}.{Salesforce_field_name}

   For example,

   - If you want Salesforce to search for a case with a specific case number, create a **Call Profile** field with the name **SF.Case.CaseNumber** that queries the case object for a CaseNumber. The value of CaseNumber is identified using a Contact Center script.
   - If you have a custom field in the contact object name **CustomerNumber__c**, create a **Call Profile** field with the name **SF.Contact.CustomerNumber__c**.

2. Develop a script in the Connect Contact Center Director using the GCCS tool to collect the number and populate it to the **Call Profile** field.



3. For the **Call Profile** custom search feature to work, the optional APEX package in Step 7 – Load APEX Package (Optional) must be successfully installed. There is no additional configuration required in the Mitel for Salesforce Call Center configuration for this feature. When a call is routed to an agent, the following scenarios are checked:
   - If there is no **Call Profile** field created in

     SF.{Salesforce_object_name}.{Salesforce_field_name} format, the default caller ID number search is performed.
   - If there is a **Call Profile** field created in SF.{Salesforce_object_name}.{Salesforce_field_name} format and there is no value set for this field, the field is ignored, and the default caller ID number search is performed.
   - If there is a **Call Profile** field created in SF.{Salesforce_object_name}.{Salesforce_field_name} format and a value is set for the field, the alternate query is invoked automatically.

     If a record is found with the specific value, the script pops the page with that value.

     If no records are found with a matching value, the default caller ID number search is performed.

Note: Note: To display or store the Call Profile field, use the following Call Profile format:

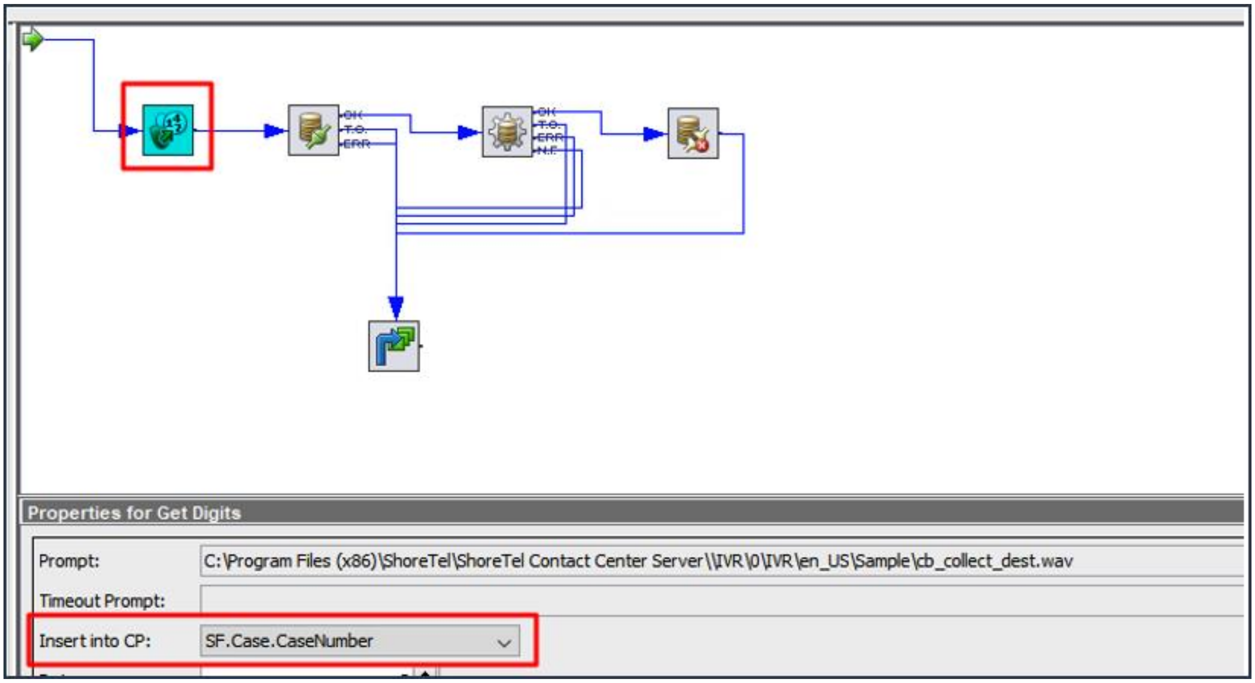
{"Case": "CP(SF.{Salesforce_object_name}.{Salesforce_field_name})"}

MiVoice Connect implementations

1. Define a **Call Profile** field in the MiCloud Connect Contact Center Director in the following format:

   SF.{Salesforce_object_name}.{Salesforce_field_name}

   For example,
   - If you want Salesforce to search for a case with a specific case number, create a **Call Profile** field with the name **SF.Case.CaseNumber** that queries the case object for a CaseNumber. The value of CaseNumber is identified using a Contact Center script.
   - If you have a custom field in the contact object name **CustomerNumber__c**, create a **Call Profile** field with the name **SF.Contact.CustomerNumber__c**.
2. Develop a script in the Connect Contact Center Director using the GCCS tool to collect the number and populate it to the **Call Profile** field.

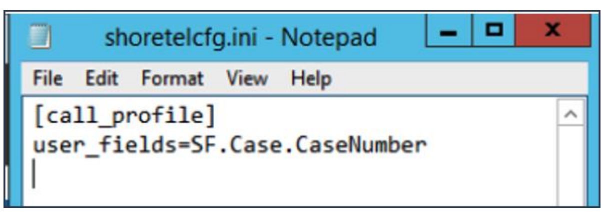


3. Create or edit a file named “*shoretelcfg.ini*” in the *C:\Program Files (x86)\ShoreTel\ShoreTel Contact Center Server\Bin* directory on the Contact Center server.

   Add the following lines to the file:

   [call_profile]

   User_fields=SF.{your_field_name}



4. Restart the Contact Center services. Ensure that the restart is done during the maintenance window.
5. For the **Call Profile** custom search feature to work, the optional APEX package in Step 7 – Load APEX Package (Optional) must be successfully installed. There is no additional configuration required in the Mitel for Salesforce Call Center configuration for this feature. When a call is routed to an agent, the following scenarios are checked:
   - If there is no **Call Profile** field created in

     SF.{Salesforce_object_name}.{Salesforce_field_name} format, the default caller ID number search is performed.
   - If there is a **Call Profile** field created in SF.{Salesforce_object_name}.{Salesforce_field_name} format and there is no value set for this field, the field is ignored, and the default caller ID number search is performed.
   - If there is a **Call Profile** field created in SF.{Salesforce_object_name}.{Salesforce_field_name} format and a value is set for the field, the alternate query is invoked automatically.

     If a record is found with the specific value, the script pops the page with that value.

If no records are found with a matching value, the default caller ID number search is performed.

Note: Note: To display or store the Call Profile field, use the following Call Profile format:

{"Case": "CP(SF.{Salesforce_object_name}.{Salesforce_field_name})”}