

Mitel for Salesforce Connect Quick Start Guide



Mitel for Salesforce Quick Start Guide

November 2018

Description: This Guide covers the basic implementation steps for the Mitel for Salesforce integration on either MiCloud Connect or MiVoice Connect. For complete instructions and setting options, see the Mitel for Salesforce Administration Guide.

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.

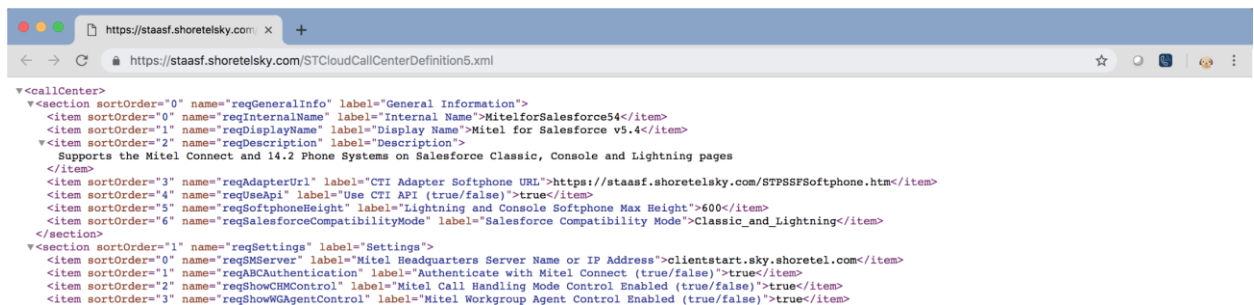
New users will want to download and import the XML file. Current users who are upgrading will want to download and import the updated XML file if they wish to take advantage of the new configuration options supported in the current Softphone.

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:

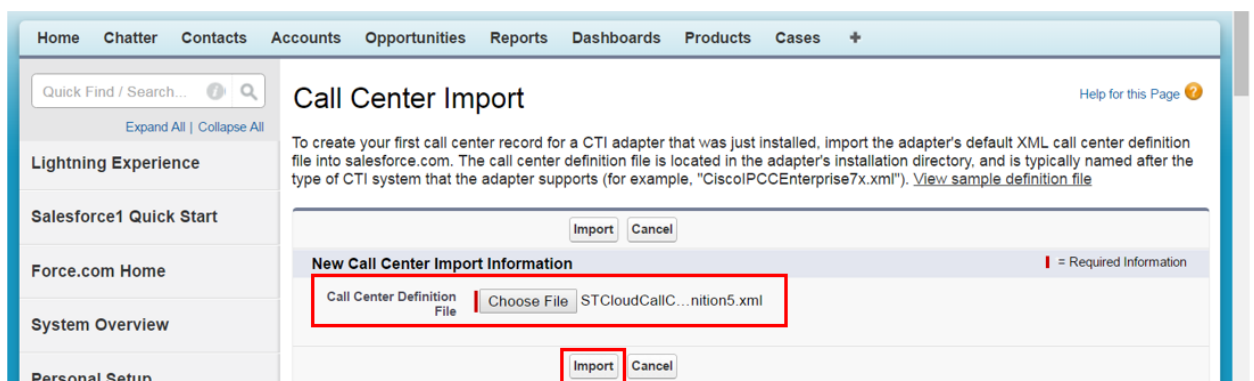
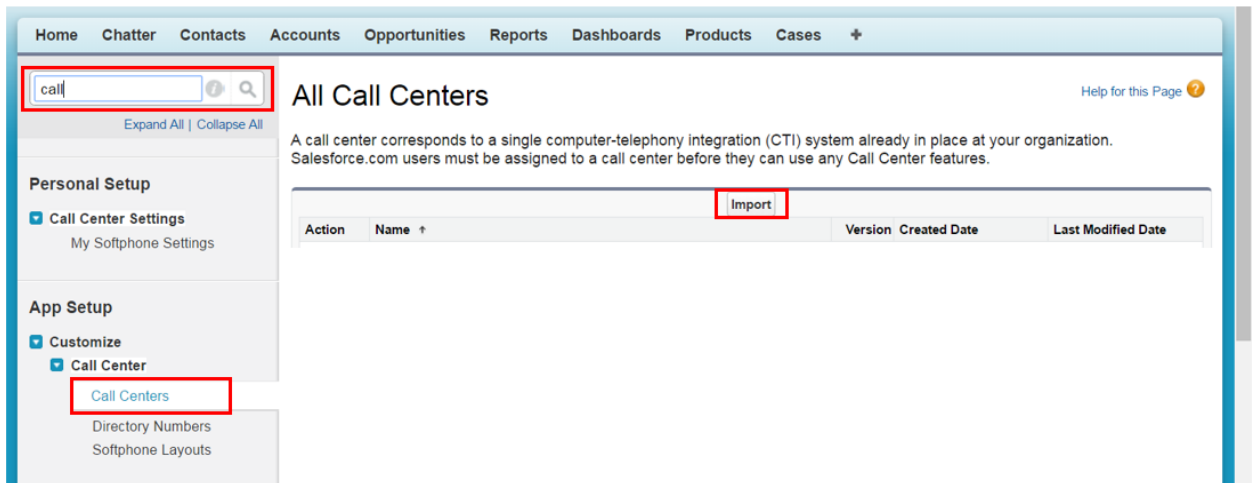


Select a location such as your desktop and click the Save button to save the file. The file name should default to “STCloudCallCenterDefinition5.xml”.

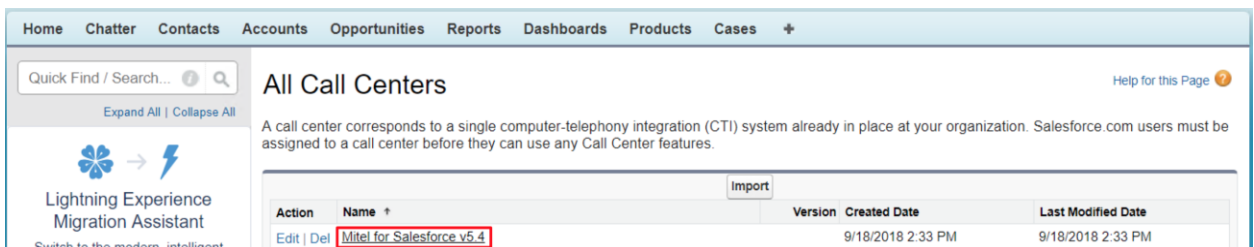
Step 2 – Import the Call Center Definition into Salesforce

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.

Home Chatter Contacts Accounts Opportunities Reports Dashboards Products Cases +

Quick Find / Search...

Expand All | Collapse All

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All Call Centers

A call center corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce.com users must be assigned to a call center before they can use any Call Center features.

Import

Action	Name	Version	Created Date	Last Modified Date
Edit Del	Mitel for Salesforce v5.4		9/18/2018 2:33 PM	9/18/2018 2:33 PM

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.

Home Chatter Contacts Accounts Opportunities Reports Dashboards Products Cases +

Quick Find / Search...

Expand All | Collapse All

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Get Started

Salesforce Mobile Quick Start

Home

System Overview

Call Center

Mitel for Salesforce v5.4

All Call Centers » Mitel for Salesforce v5.4

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/STPSSFSofphone.htm
Use CTI API (true/false)	true
Lightning and Console Softphone Max Height	600
Salesforce Compatibility Mode	Classic_and_Lightning

Settings

Mitel Headquarters Server Name or IP Address	clientstart.sky.shoretel.com
Authenticate with Mitel Connect (true/false)	true

All of the settings are described later in the **Error! Reference source not found.** 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/STPSSFSofthphone.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]

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All						
Add More Users Remove Users						
<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Profile	
<input type="checkbox"/> Remove	Apps, Alan	TM3			System Administrator	

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

First Name	equals	Patricia	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 4/16/2017
- For date/time fields, enter the value in following format: 4/16/2017 9:57 PM

Find

Add to Call Center Cancel				
<input checked="" type="checkbox"/> Full Name	Alias	Username	Role	Profile
<input checked="" type="checkbox"/> Jackson, Patricia	PJackson	pjackson@demo.com		Sales Demo User

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.

Softphone Layouts

A softphone is a customizable call control tool that appears in the sidebar of every salesforce.com page if a user is assigned to a call center and is working on a machine on which a CTI adapter has been installed. Similar to page layouts, you can design custom softphone layouts and assign them to call center users based on their user profile.

Action	Name	Default	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
Edit	Default SoftPhone Layout	<input checked="" type="checkbox"/>	kpowers	2/23/2007 12:30 PM	TM3	5/6/2015 9:09 AM

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.

Softphone Layout Edit

[Help for this Page](#)

Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layouts to user profiles by clicking Layout Assignment in the Softphone Layouts page.

Name Default SoftPhone Layout ☒ Is Default Layout

Select Call Type Inbound

Softphone Layout [Help about this section](#)

Display these call-related fields:

▶ Caller ID, Dialed Number, Queue, Segment [Edit](#)

Display these salesforce.com objects: [Add / Remove Objects](#)

▶ **If single Lead found, display:** Name [Edit](#)
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

▶ **If single Case found, display:** Case Number [Edit](#)
If multiple matches are found, only the Case Number is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

▶ **If single Campaign found, display:** Campaign Name [Edit](#)
If multiple matches are found, only the Campaign Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

▶ **If single Contact found, display:** Name [Edit](#)
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

The bottom section controls the behavior of the integration.

Screen Pop Settings [Help about this section](#)

▼ **Screen pops open within:** Existing browser window [Collapse](#)

☒ Existing browser window
☐ New browser window or tab

▼ **No matching records:** Pop to new Lead [Collapse](#)

☐ Don't pop any screen
☒ Pop to new Lead
☐ Pop to Visualforce page

▼ **Single-matching record:** Pop detail page [Collapse](#)

☐ Don't pop any screen
☒ Pop detail page
☐ Pop to Visualforce page

▼ **Multiple-matching records:** Pop to search page [Collapse](#)

☐ Don't pop any screen
☒ Pop to search page
☐ Pop to Visualforce page

- **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.

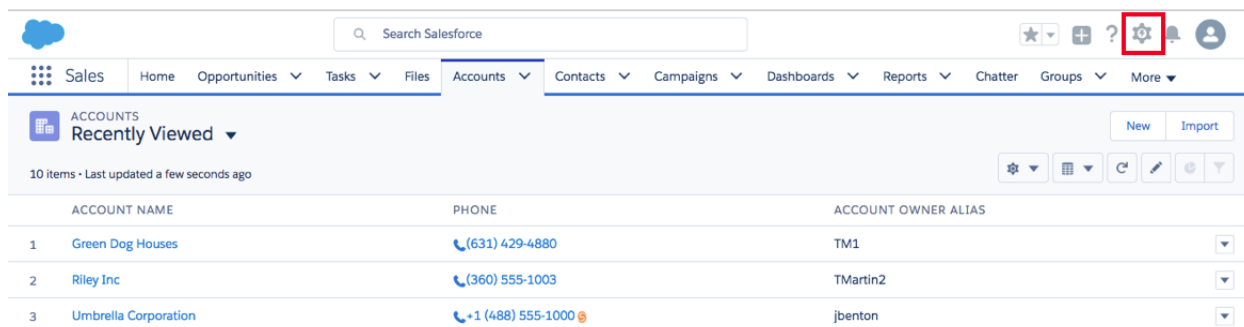
- Single-matching record – If the phone number of the caller is found on a single record, the integration can do nothing, pop the detail page where the phone number was found or pop a custom Visualforce page. The default is to pop the detail page.
- Multiple-matching records – If the phone number of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

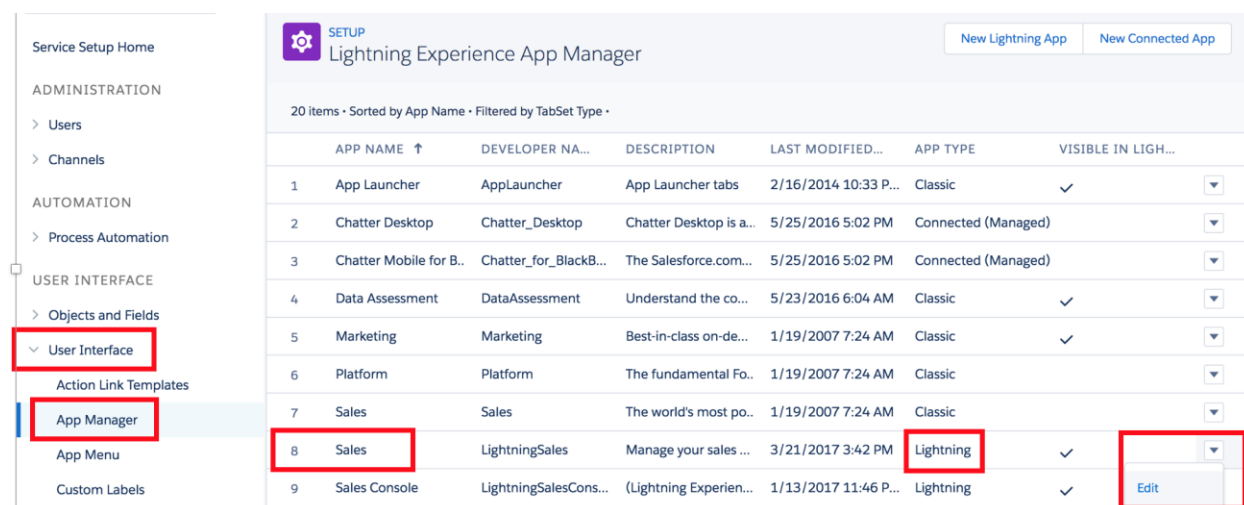
This step only applies if you wish to use the Mitel for Salesforce integration on Lightning. If not, please proceed to Step 7 – Load APEX Package (Optional).

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



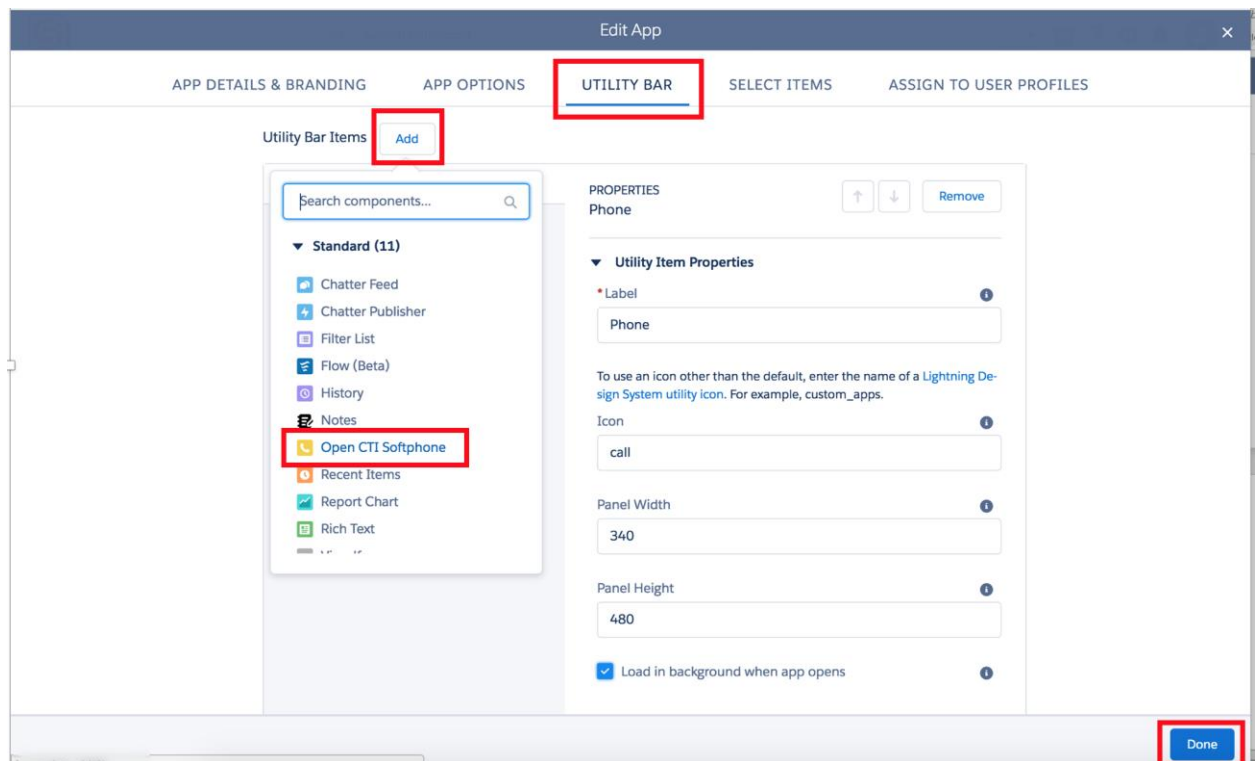
ACCOUNT NAME	PHONE	ACCOUNT OWNER ALIAS
1 Green Dog Houses	(631) 429-4880	TM1
2 Riley Inc	(360) 555-1003	TMartin2
3 Umbrella Corporation	+1 (488) 555-1000	jbenton

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.



APP NAME	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED	APP TYPE	VISIBLE IN LIGHTNING
1 App Launcher	AppLauncher	App Launcher tabs	2/16/2014 10:33 P...	Classic	✓
2 Chatter Desktop	Chatter_Desktop	Chatter Desktop is a...	5/25/2016 5:02 PM	Connected (Managed)	
3 Chatter Mobile for B...	Chatter_for_BlackB...	The Salesforce.com...	5/25/2016 5:02 PM	Connected (Managed)	
4 Data Assessment	DataAssessment	Understand the co...	5/23/2016 6:04 AM	Classic	✓
5 Marketing	Marketing	Best-in-class on-de...	1/19/2007 7:24 AM	Classic	✓
6 Platform	Platform	The fundamental Fo...	1/19/2007 7:24 AM	Classic	
7 Sales	Sales	The world's most po...	1/19/2007 7:24 AM	Classic	
8 Sales	LightningSales	Manage your sales ...	3/21/2017 3:42 PM	Lightning	✓
9 Sales Console	LightningSalesCons...	(Lightning Experien...	1/13/2017 11:46 P...	Lightning	✓

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.



☐ Install for Admins Only

☒ Install for All Users

☐ Install for Specific Profiles...

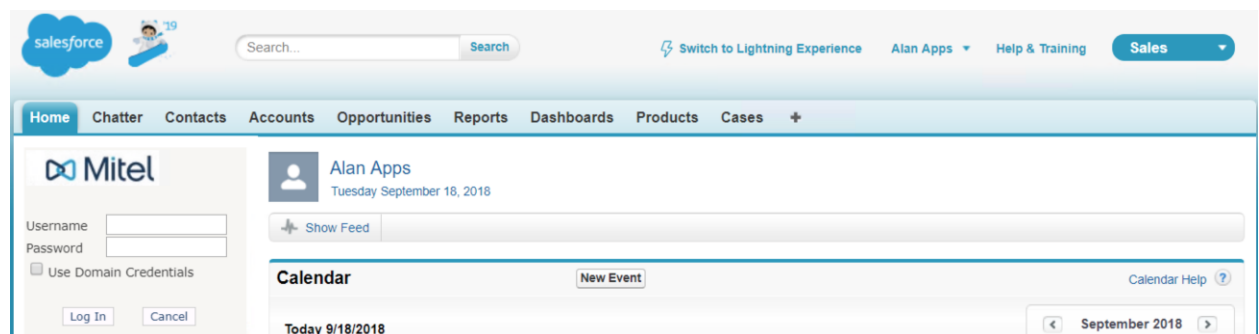
[Upgrade](#) [Cancel](#)

App Name	Publisher	Version Name	Version Number
STPSSoftphone_5.1_Apex	Mitel	MiCloud Adapter Apex 2.0 Code Version 5.1	

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.



salesforce

Search... Search

Switch to Lightning Experience Alan Apps Help & Training Sales

Home Chatter Contacts Accounts Opportunities Reports Dashboards Products Cases +

Mitel

Username Password

☐ Use Domain Credentials

Log In Cancel

Alan Apps
Tuesday September 18, 2018

Show Feed

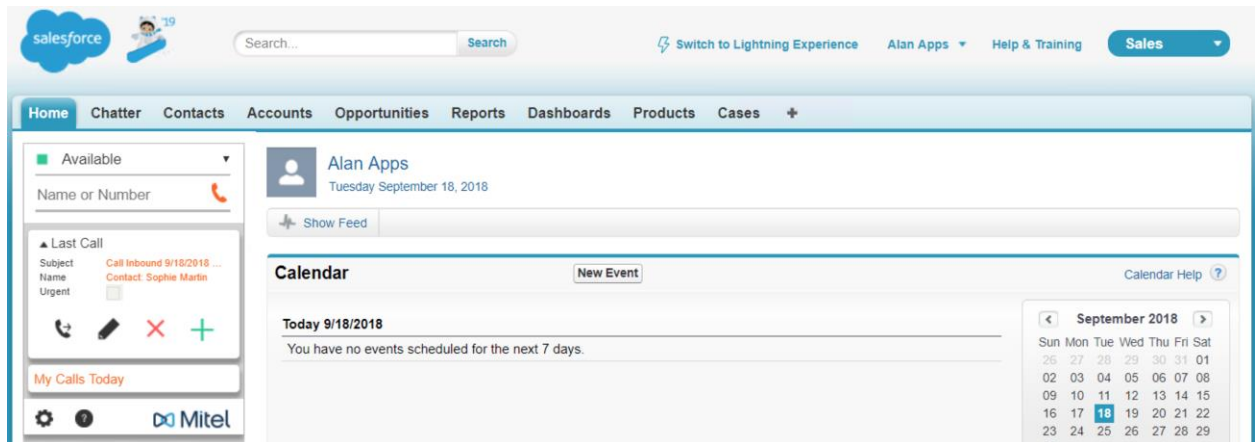
Calendar New Event

Calendar Help

Today 9/18/2018

September 2018

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



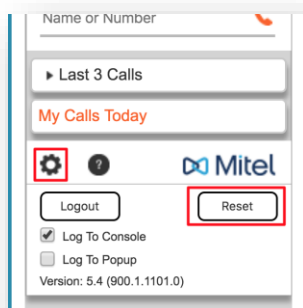
Troubleshooting

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.

Reset

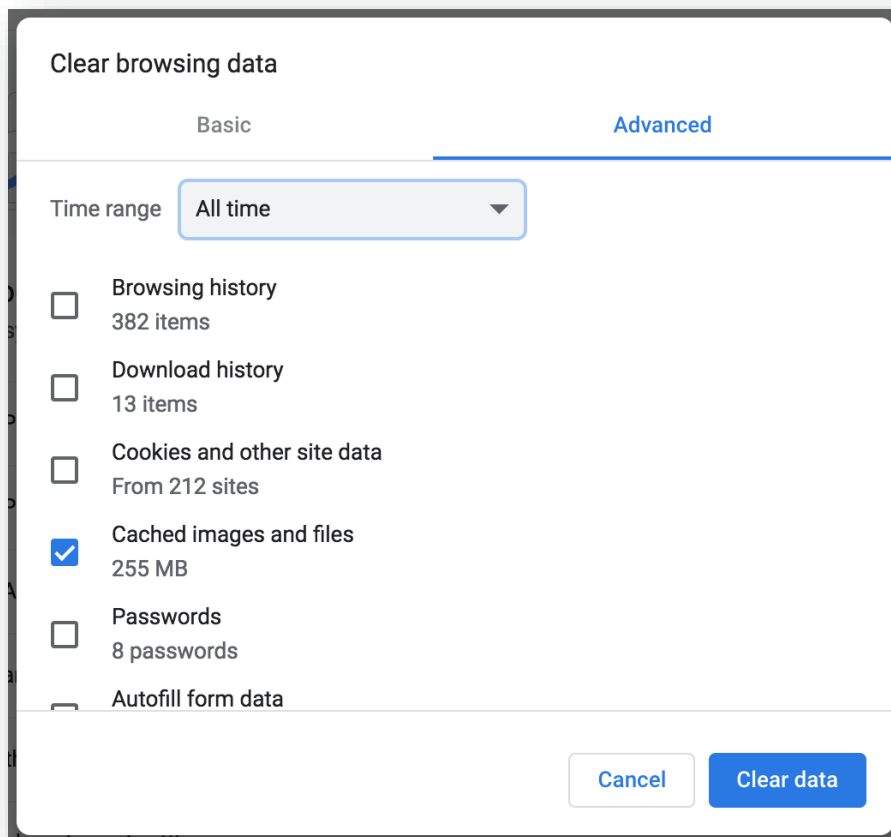
In some cases, the integration will need to be reset. If you are at the login prompt, click cancel to reveal the gear icon to the left of the Mitel icon. If you are logged into the integration, the gear icon will already be visible at the bottom of the integration to the left of the Mitel icon.



Click the [Reset] button and log back in.

Clear the Browser Cache

In some cases, the browser is caching an old version of the software. Clearing the cache will force the browser to load the most current version. It is NOT necessary to delete browsing history, cookies, passwords, autofill data, etc. Only the cached images and files.



Using the Chrome browser, click on the three vertical dots to access the Chrome browser menu, select More Tools > Clear Browsing Data. Set the time range to “All time,” select ONLY “Cached images and files” and click [Clear data].

MiCloud Connect Contact Center agent controls

If the user is a MiCloud Connect Contact Center agent and they are able to log in to the integration, but do not see the agent controls, make sure that the “Enable as CRM User” parameter is enabled on their agent profile in the Contact Center Director. They must also have a Premier profile.

Collecting logs to obtain technical support

If issues persist, you may need to collect logs from your browser to submit to tech support staff. Detailed instructions are available here:

<https://oneview.mitel.com/s/article/Collecting-logs-on-the-Mitel-for-Salesforce-integration>