

# MiVoice Integration for Salesforce Troubleshooting Guide

OCTOBER 2018

RELEASE 2.2

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## **MiVoice Integration for Salesforce Troubleshooting Guide**

Release 2.2

Revised: October 2018

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

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

## User Issues

Symptom	See page:
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## Display Issues

Symptom	See page:
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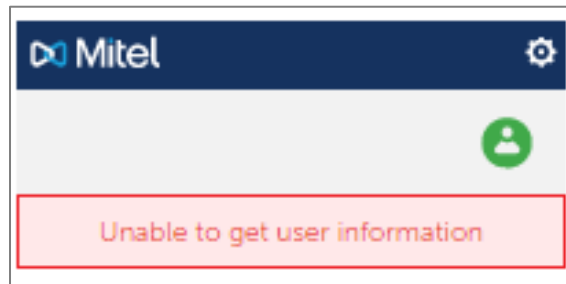
## **User Issues**

This page is intentionally blank.

## Unable to Get User Information

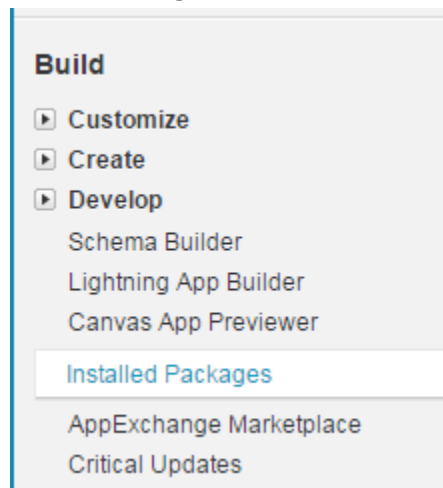
### Symptom:

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




### Corrective Action:

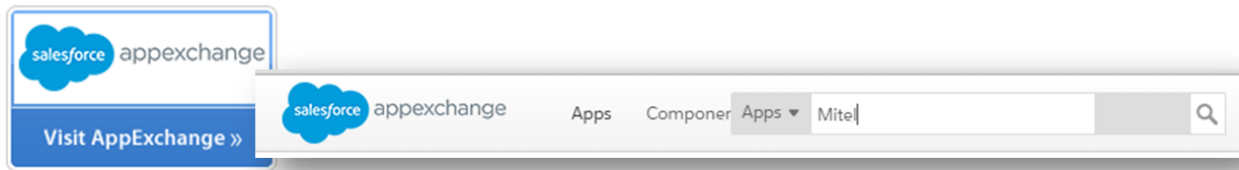
1. Log in as Salesforce Administrator.
2. Click **Setup > Build > Installed Packages**.



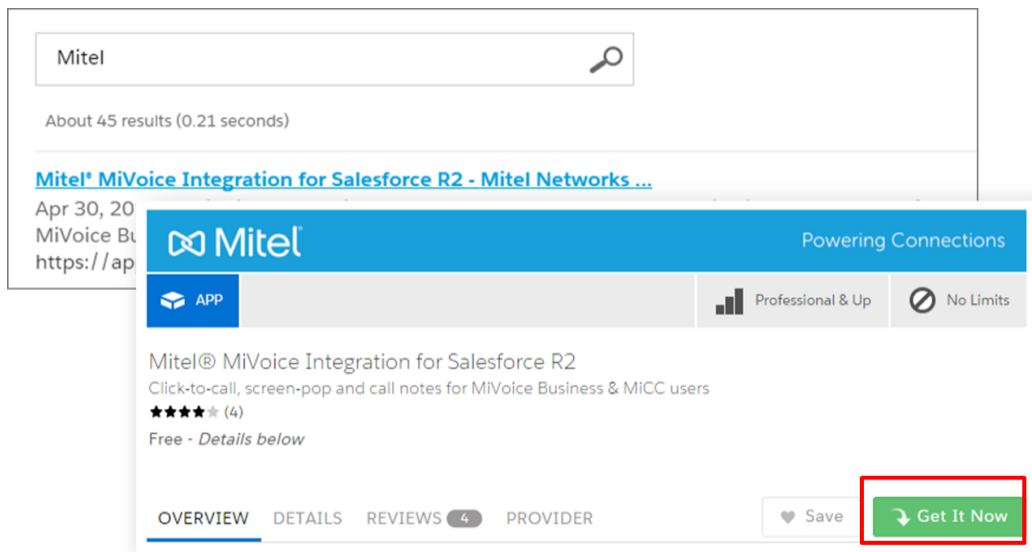
3. Check that MiVoice Integration version number **2.1** is listed in the Installed Packages section:

Installed Packages				
Action	Package Name	Publisher	Version Number	Na
Uninstall 	<a href="#">MitelMiVoiceIntegration</a>	Mitel	2.1	Mit
Description Mitel MiVoice Integration Managed Package				

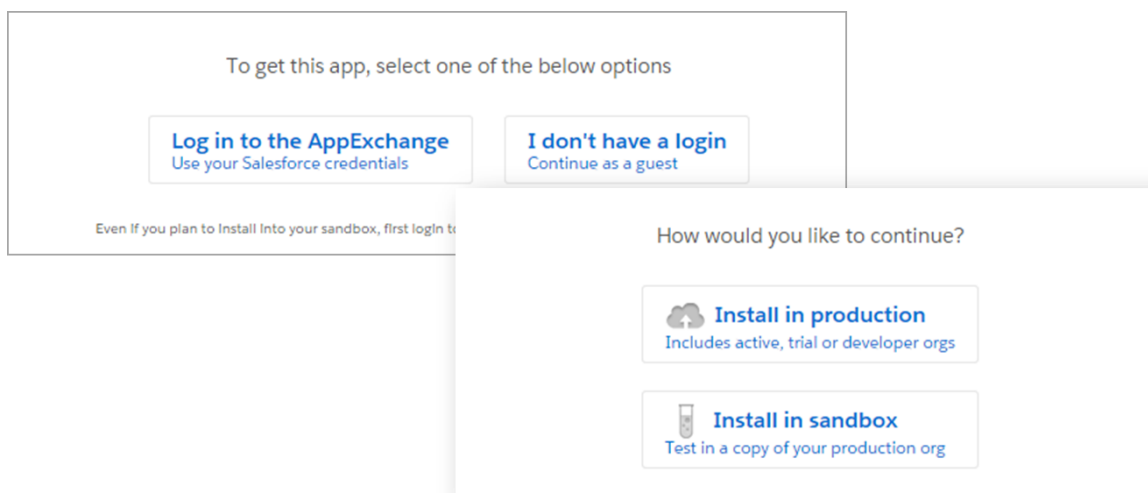
4. If MitelMiVoiceIntegration 2.1 is **not** listed, visit AppExchange and search for “Mitel”.



5. Click MiVoice Integration for Salesforce R2 and then click **Get It Now**.



6. Log in to AppExchange and select Install in production or Install in sandbox:






7. Agree to the terms and conditions and then click **Confirm and Install**.


☒ I have read and agree to the [terms and conditions](#) .

[Cancel Install](#) | [Back to previous step](#)


**Confirm and Install!**

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



**Install Mitel® MiVoice Integration for Salesforce R2**  
 By Mitel Networks Corporation



☐ Install for Admins Only




☒ Install for All Users



☐ Install for Specific Profiles...

**Install** **Cancel**

9. The application is installed.


**Installing and granting access to all Users...**

App Name	Publisher	Version Name	Version Number
Mitel® MiVoice Integration for Salesforce R2	Mitel Networks Corporation	September 30 2015	2.1

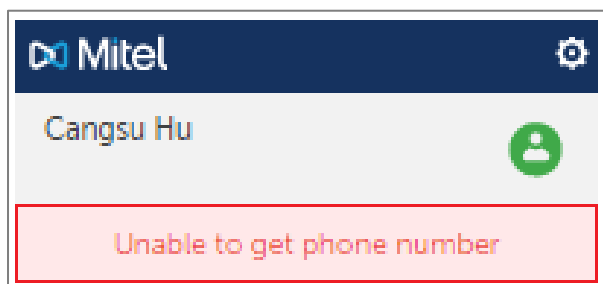
10. Refer to the ***MiVoice Integration for Salesforce Administration Guide*** for instructions to set up a call center for each user.

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

## Unable to Get Phone Number

### Symptom:

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



### Corrective Action:

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

View: All Users [Edit](#) | [Create New View](#)

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

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile
<a href="#">Edit</a>	<a href="#">Chatter Expert</a>	<a href="#">Chatter</a>	<a href="#">chatty.00d61000000ihsuea0.cgsaibtb52lx@chatter.salesforce.com</a>			✓	<a href="#">Chatter Fre User</a>
<a href="#">Edit</a>	<a href="#">Eastop, Debbie</a>	<a href="#">DEastop</a>	<a href="#">debbie.eastop@mitelsf.com</a>	27/11/2015 9:08 AM		✓	<a href="#">System Administra</a>
<a href="#">Edit</a>	<a href="#">Edit - Record 2 - Eastop, Debbie</a>		<a href="#">cgsu.hu@mitelsf.com</a>	27/11/2015 8:47 AM		✓	<a href="#">System Administra</a>

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

CRM Content Alerts as Daily Digest

Allow Forecasting ☐

Call Center

Phone

Extension

## Access Issues - Create a Custom Salesforce User Profile

### Symptom:

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



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

### Corrective Action:

Clone a custom profile from an existing profile.

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

The screenshot displays the Salesforce 'Profiles' page. On the left, the navigation sidebar includes sections for 'Lightning Experience', 'Salesforce1 Quick Start', 'Force.com Home', and 'Administer'. Under 'Administer', 'Manage Users' is expanded, and 'Profiles' is selected. The main area, titled 'Profiles', shows a table of existing profiles. The 'Marketing User' profile is highlighted, and a mouse cursor is clicking on the 'Clone' link in the 'Action' column. The table lists various profiles such as 'External Identity User', 'Force.com - App Subscription User', 'Force.com - Free User', 'Gold Partner User', 'High Volume Customer Portal', 'Identity User', 'Marketing User', 'Partner App Subscription User', 'Partner Community Login User', and 'Partner Community User'.

Action	Profile Name	User License
<a href="#">Edit</a>   <a href="#">Clone</a>	External Identity User	External Identity
<a href="#">Edit</a>   <a href="#">Clone</a>	Force.com - App Subscription User	Force.com - App Subscription
<a href="#">Edit</a>   <a href="#">Clone</a>	Force.com - Free User	Force.com - Free
<a href="#">Edit</a>   <a href="#">Clone</a>	Gold Partner User	Gold Partner
<a href="#">Edit</a>   <a href="#">Clone</a>	High Volume Customer Portal	High Volume Customer Portal
<a href="#">Edit</a>   <a href="#">Clone</a>	Identity User	Identity
<a href="#">Edit</a>   <a href="#">Clone</a>	Marketing User	Salesforce
<a href="#">Edit</a>   <a href="#">Clone</a>	Partner App Subscription User	Partner App Subscription
<a href="#">Edit</a>   <a href="#">Clone</a>	Partner Community Login User	Partner Community Login
<a href="#">Edit</a>   <a href="#">Clone</a>	Partner Community User	Partner Community

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

You must select an existing profile to clone from.

Existing Profile	Marketing User
User License	Salesforce
Profile Name	<input type="text" value="Custom: Marketing User"/>

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

**Field-Level Security**

Standard Field-Level Security

Account	<a href="#">View</a>	Idea	<a href="#">View</a>
Asset	<a href="#">View</a>	Lead	<a href="#">View</a>
Campaign	<a href="#">View</a>	Macro	<a href="#">View</a>
Campaign Member	<a href="#">View</a>	Metric	<a href="#">View</a>
Case	<a href="#">View</a>	Opportunity	<a href="#">View</a>
Coaching	<a href="#">View</a>	Opportunity Product	<a href="#">View</a>
Contact	<a href="#">View</a>	Order	<a href="#">View</a>
Contract	<a href="#">View</a>	Order Product	<a href="#">View</a>
Duplicate Record Item	<a href="#">View</a>	Performance Cycle	<a href="#">View</a>
Duplicate Record Set	<a href="#">View</a>	Price Book	<a href="#">View</a>
Event	<a href="#">View</a>	Price Book Entry	<a href="#">View</a>

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

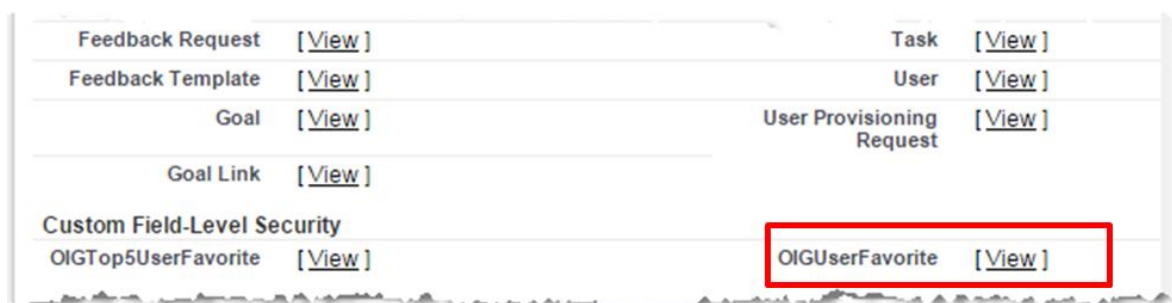
Account Field-Level Security for profile  
**Custom: Marketing User**

Field Name	Field Type	Visible
Account Name	Name	<input checked="" type="checkbox"/>
Account Number	Text	<input checked="" type="checkbox"/>
Account Owner	Lookup	<input checked="" type="checkbox"/>

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

[View Link]	Fields to make visible:		
Campaign <a href="#">[View]</a>	Campaign Name	Text	✓
	DNIS	Phone	✓
Case <a href="#">[View]</a>	Case Number	Auto Number	✓
	Subject	Text	✓
Contact <a href="#">[View]</a>	Account Name	Lookup	✓
	Home Phone	Phone	✓
	Mobile	Phone	✓
	Name	Name	✓
	Phone	Phone	✓
Lead <a href="#">[View]</a>	Company	Text	✓
	Name	Name	✓
	Phone	Phone	✓
Opportunity <a href="#">[View]</a>	Opportunity Name	Text	✓
Task <a href="#">[View]</a>	Make all visible.		

8. Go back to the Field Level Security page, under Custom Field-Level Security, click the [View](#) link beside **OIGUserFavorite**



Make sure all are visible.

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

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

Standard Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaigns	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coaching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D&B Companies	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Goal Links	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Macros	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Metrics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Metric Data Links	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

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

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
OIGUserFavorites	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

12. To associate the user with the new profile, click **Setup > Administer > Manage users > Users**.
13. Select the user and click **Edit**.
14. Set the **Profile** field to the new custom profile.

Role	
User License	Salesforce
Profile	<u>Custom: Marketing User</u>
Active	<input checked="" type="checkbox"/>

## Access Control for Professional Edition

### Symptom:

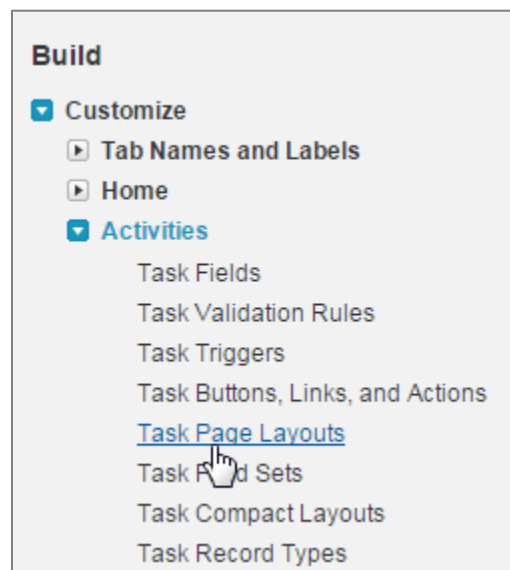
Professional Editions of Salesforce do not support the concept of Custom Profiles or Field Level Security. As a result, Field Level Security is handled by the page layout for each object. The fields that are required for the MiVoice Integration must be added to the page layouts.

### Corrective Action:

#### Task Page Layouts

1. Log in as Administrator.
2. **Classic:** Click **Setup > Build > Customize > Activities > Task Page Layouts**.

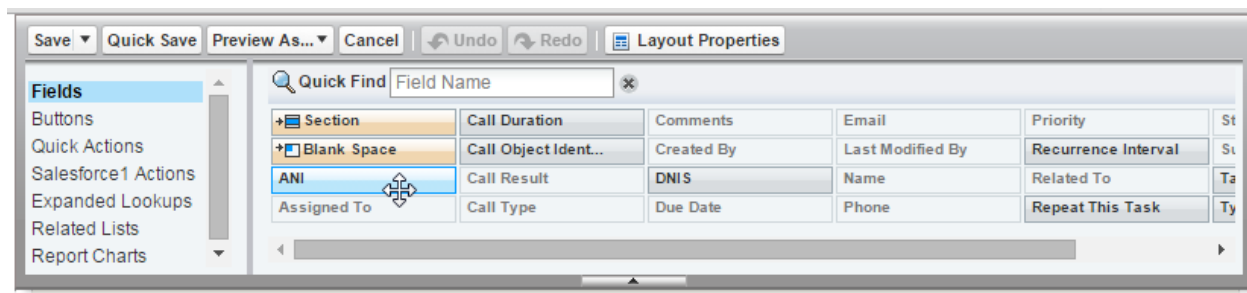
**Lightning:** Click **Setup > Object Manager > Task > Page Layouts > [Edit Task Layout Name]**.



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

Task Detail		Standard Buttons	
		<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Delete Series"/> <input type="button" value="Create Follow-Up Task"/> <input type="button" value="Create Follow-Up Event"/>	
Task Information			
* ● Subject	Sample Subject	Blank Space	
● Call Result	Sample Call Result	● Due Date	11/20/2015 3:34 PM
● ANI	1-415-555-1212	● Related To	<a href="#">Sample Contract</a>
🔒 Call Duration	40,266	● DNIS	1-415-555-1212
🔒 Call Type	Sample Call Type	🔒 Phone	1-415-555-1212
* ● Assigned To	<a href="#">Sample User</a>		
● Name	<a href="#">Sample Contact</a>		

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



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

### Campaigns Page Layouts

- Classic:** While still logged in as Administrator, click **Setup > Build > Customize > Campaigns > Page Layouts** and then click Edit.

**Lightning:** Click **Setup > Object Manager > Campaign > Page Layouts > [Edit Campaign Layout Name]**.

- Scroll down to the Campaign Details section and make sure that the fields are listed as follows:

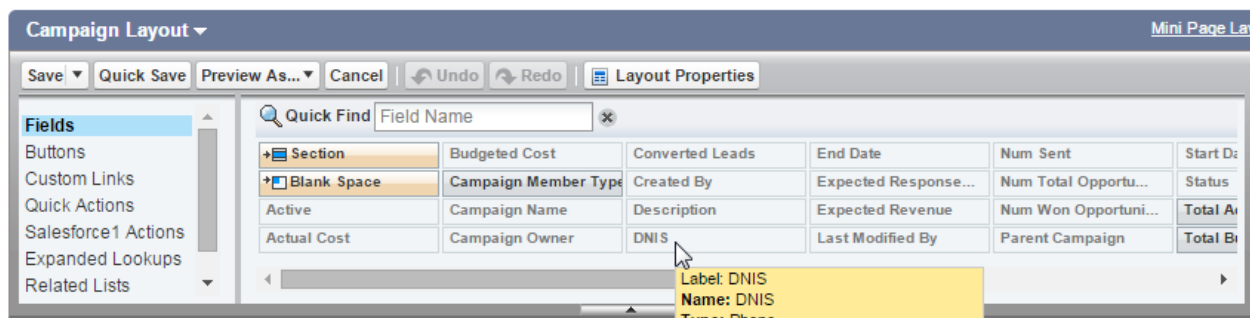
**Campaign Detail**

Standard Buttons: [Edit](#) [Delete](#)

**Campaign Information (Header visible on edit only)**

- Campaign Name:** Sample Campaign Name
- Active:** ☒
- Parent Campaign:** [Sample Campaign](#)
- Type:** Sample Type
- DNIS:** 1-415-555-1212

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



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



## Leads Page Layout

1. **Classic:** While still logged in as Administrator, click **Setup > Build > Customize > Leads > Page Layout** and click E**dit**.

**Lightning:** Click **Setup > Object Manager > Lead > Page Layouts > [Edit Lead Layout Name]**.

2. Scroll down to the Lead Detail section and make sure that **Phone** and **Mobile** fields are listed.

Lead Information (Header visible on edit only)

Lead Owner	Sample User	Phone	1-415-555-1212
* ● Name	Sarah Sample	Mobile	1-415-555-1212
* ● Company	Sample Company	Fax	1-415-555-1212
Title	Sample Title	● Email	sarah.sample@company.com
Lead Source	Sample Lead Source	Website	www.salesforce.com
Campaign	Sample Campaign	* ● Lead Status	Sample Lead Status
Industry	Sample Industry	Rating	Sample Rating
Annual Revenue	\$123.45	No. of Employees	60,994

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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

1	Fax	Last Transfer Date	Mobile	Phone	SIC Code
I	Fax Opt Out	Lead Owner	Name	Primary	Title
	Industry	Lead Source	No. of Employees	Product Interest	Website
Out	Last Modified By	Lead Status	Number of Locations	Rating	

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

## Accounts Page Layout

1. **Classic:** While still logged in as Administrator, click **Setup > Build > Customize > Accounts > Page Layout** and then click Edit.

**Lightning:** Click **Setup > Object Manager > Account > Page Layouts > [Edit Account Layout Name]**.

2. Scroll down to the Account Detail section and make sure that the **Phone** field is listed.

**Account Detail**

Standard Buttons: [Edit](#) [Delete](#) [Sharing](#) [Include Offline](#) [Send an Email](#)

Custom Buttons:

**Account Information (Header visible on edit only)**

Account Owner	<a href="#">Sample User</a>	Rating	Sample Rating
* Account Name	Sample Account Name	Phone	1-415-555-1212
Parent Account	<a href="#">Sample Account</a>	Fax	1-415-555-1212
Account Number	Sample Account Number	Website	www.salesforce.com
Account Site	Sample Account Site	Ticker Symbol	<a href="#">Sample Ticker Symbol</a>
Type	Sample Type	Ownership	Sample Ownership
Industry	Sample Industry	Employees	40,078
Annual Revenue	\$123.45	SIC Code	Sample SIC Code

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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find: Field Name

Fax	Last Transfer Date	Mobile	Phone	SIC Code
Fax Opt Out	Lead Owner	Name	Primary	Title
Industry	Lead Source	No. of Employees	Product Interest	Website
Last Modified By	Lead Status	Number of Locations	Rating	

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

## Contacts Page Layout

1. **Classic:** While still logged in as Administrator, click **Setup > Build > Customize > Contacts > Page Layouts** and then click Edit.

**Lightning:** Click **Setup > Object Manager > Contact > Page Layouts > [Edit Contact Layout Name]**.

2. Scroll down to the Contact Detail section and make sure that the **Phone, Mobile, and Home Phone** fields are listed.

**Contact Detail**

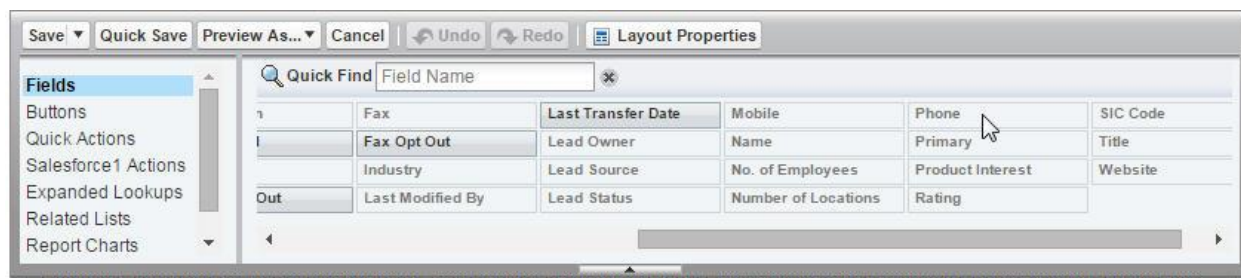
Standard Buttons: [Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Request Update](#) [Send an Email](#)

Custom Buttons:

**Contact Information (Header visible on edit only)**

Contact Owner	<a href="#">Sample User</a>	Phone	1-415-555-1212
* Name	Sarah Sample	Home Phone	1-415-555-1212
Account Name	<a href="#">Sample Account</a>	Mobile	1-415-555-1212
Title	Sample Title	Other Phone	1-415-555-1212
Department	Sample Department	Fax	1-415-555-1212
Birthdate	27/11/2015	Email	sarah.sample@company.com
Reports To	<a href="#">Sample Contact</a>	Assistant	Sample Assistant
Lead Source	Sample Lead Source	Asst. Phone	1-415-555-1212

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



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

## Case Page Layout

1. **Classic:** While still logged in as Administrator, click **Setup > Build > Customize > Cases > Page Layout** and then click **Edit**.

**Lightning:** Click **Setup > Object Manager > Case > Page Layouts > [Edit Case Layout Name]**.

2. Scroll down to the Case Detail section and make sure that the **Case Number** field is listed:

Case Detail

Standard Buttons

Edit

Delete

Close Case

Clone

Sharing

Custom Buttons

---

Case Information (Header visible on edit only)

Case Owner

Sample User

Case Number

GEN-2004-001234

Contact Name

Sample Contact

Account Name

Sample Account

Type

Sample Type

Case Reason

Sample Case Reason

Status

Sample Status

Priority

Sample Priority

Contact Phone

1-415-555-1212

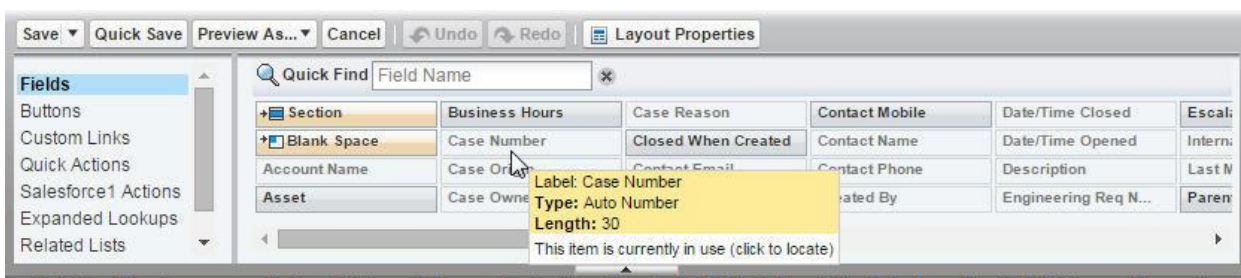
Contact Email

sarah.sample@company.com

Case Origin

Sample Case Origin

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



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

## MiVoice Integration Unresponsive after session times out

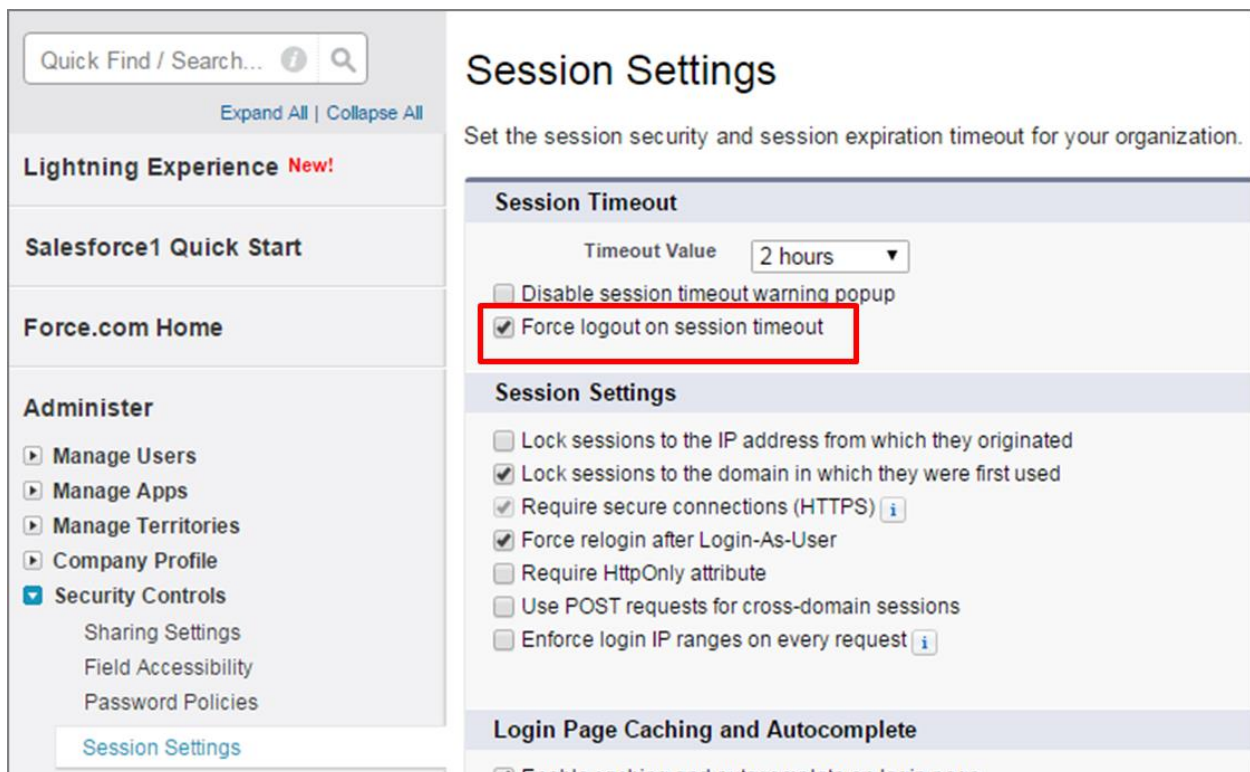
### Symptom:

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

### Corrective Action:

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

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



## Display Issues

This page is intentionally blank.

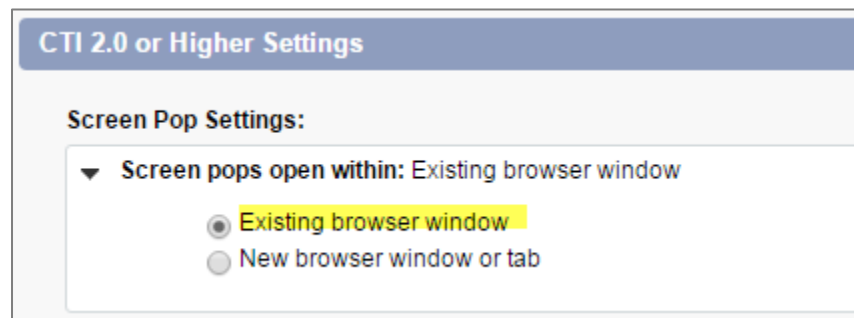
## Disable Screen Pop-up in New Window or Tab

### Symptom:

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

### Corrective Action:

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

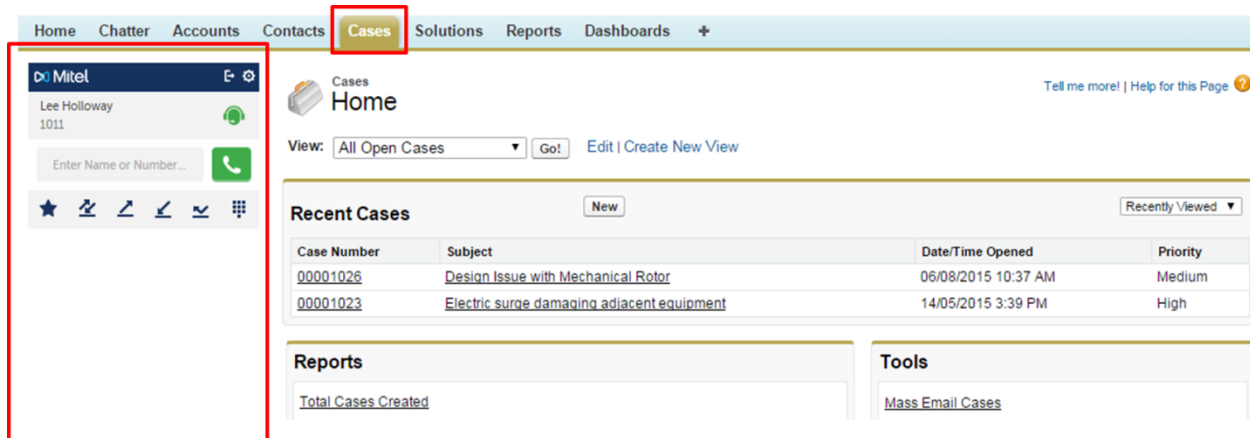


**Note:** Opening MiVoice Integration for Salesforce in multiple browser tabs in Classic Mode does not consume multiple user licenses; however, this is not recommended as it can result in unpredictable application behavior, (missing or duplicate contact updates, for example). Opening MiVoice Integration for Salesforce in multiple browser windows—either on the same computer or a different one—in Classic mode does consume multiple user licenses, and is similarly not recommended. If multiple concurrent MiVoice Integration for Salesforce tabs are required, Console Mode is recommended.

## Enable the Sidebar for the Cases Screen

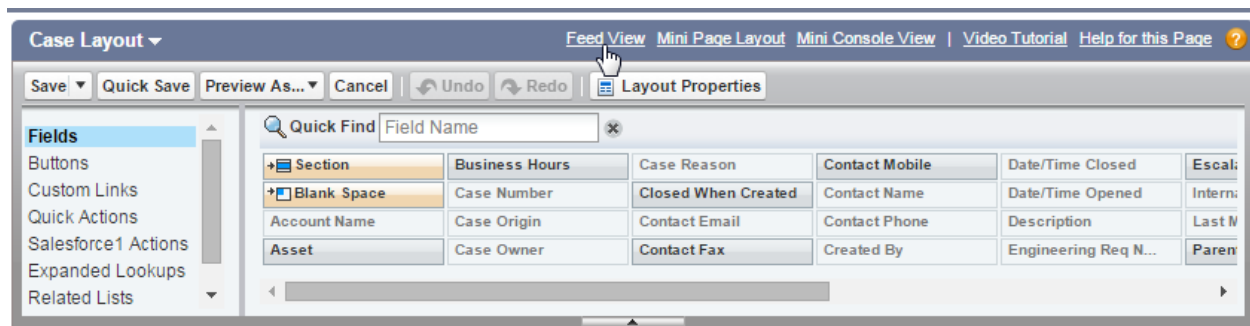
### Symptom:

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



### Corrective Action:

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





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

The screenshot displays the 'Other Tools and Components' interface. At the top, there's a header 'Other Tools and Components'. Below it, on the left, are sections for 'Custom Components' (with an info icon) and 'Choose Placement' (also with an info icon). The main area is divided into three columns: 'Left Column', 'Hidden', and 'Right Column'. The 'Left Column' contains '--None--'. The 'Hidden' column contains 'Files'. The 'Right Column' contains a list of items: 'Layout, Print, & Help Links', 'Following Icon', 'Followers List', 'Topics', 'Custom Links', and 'Custom Buttons'. Between the columns are 'Up', 'Down', and 'Move' buttons. At the bottom left, the 'Hide Sidebar' checkbox is highlighted with a red rectangle and is currently unchecked. A mouse cursor is shown clicking the checkbox.

Action	Name	Height (Pixels)
<a href="#">+ Add a Visualforce page</a>		

Left Column: --None--

Hidden: Files

Right Column: Layout, Print, & Help Links, Following Icon, Followers List, Topics, Custom Links, Custom Buttons

Hide Sidebar ☐

## Add a Custom Field for DNIS Search

### Symptom:

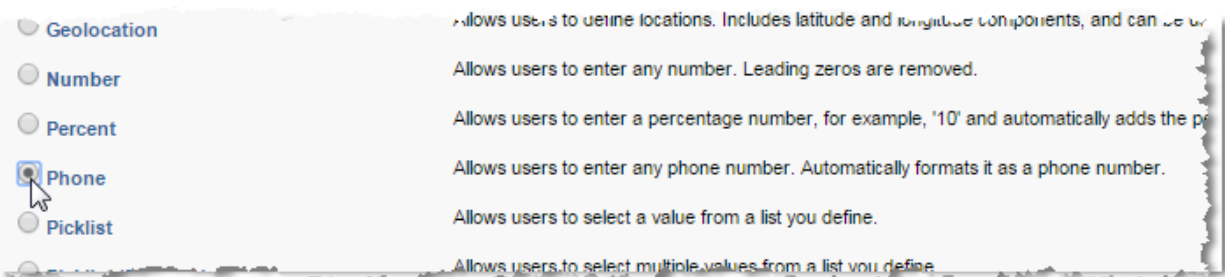
DNIS Search option does not pop Campaign pages.

### Corrective Action:

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

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

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



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

The screenshot shows the 'Step 2. Enter the details' form in Salesforce. The 'Field Label' and 'Field Name' fields are both set to 'DNIS'. The 'Description' and 'Help Text' fields are empty. The 'Required' checkbox is unchecked. The 'Default Value' field is set to 'Show Formula Editor'. The form includes 'Previous', 'Next', and 'Cancel' buttons at the top right and bottom right.

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

Field-Level Security for Profile	<input type="checkbox"/> Visible
Contract Manager	<input checked="" type="checkbox"/>
Custom: Marketing User	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>
Gold Partner User	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>

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

Step 4. Add to page layouts

Step 4 of 4

Previous

Save & New

Save

Cancel

Field Label

DNIS

Data Type

Phone

Field Name

DNIS

Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Campaign Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous

Save & New

Save

Cancel

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