

MiVoice Integration for Salesforce User Guide

OCTOBER 2018

RELEASE 2.2



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MiVoice Integration for Salesforce User Guide

Release 2.2

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About MiVoice Integration for Salesforce

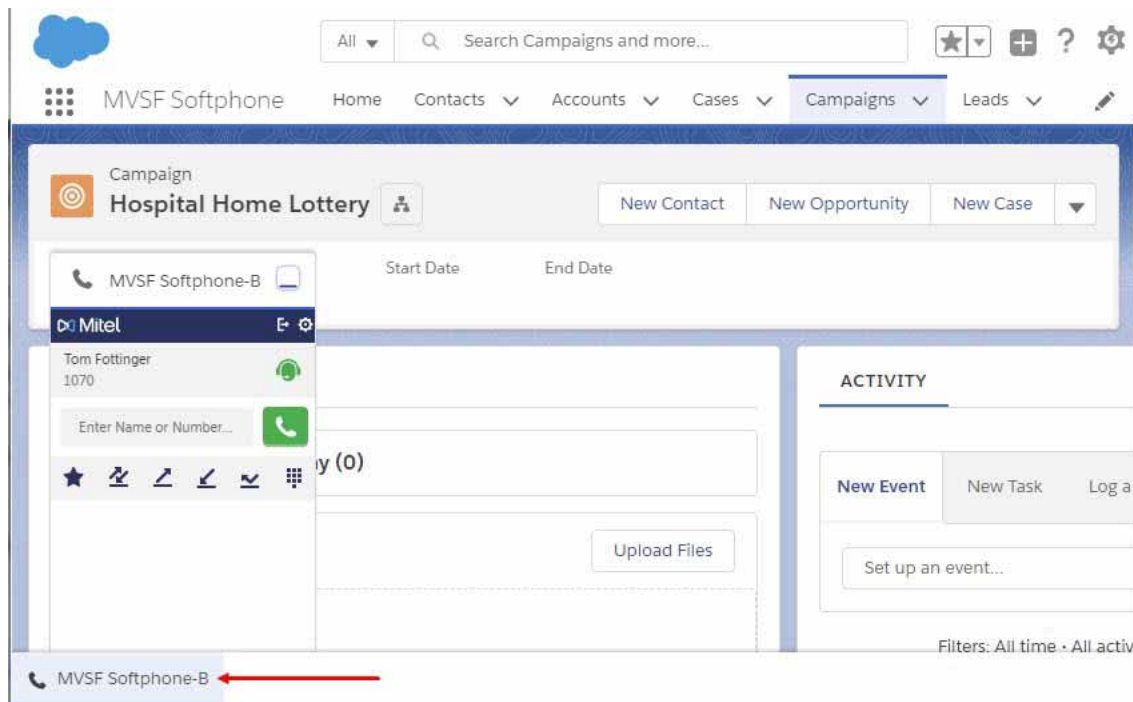
Mitel MiVoice Integration for Salesforce is a browser-based application that provides computer telephony and productivity features for users of Mitel MiVoice Business and the Salesforce Customer Relationship Management (CRM) solution. These include:

- Inbound features (such as screen-pop and answer call)
- Mid-call features (such as transfer, conference, hold and retrieve call, and logging of call notes)
- Outbound features (such as search for contacts and click-to-dial)

MiVoice Integration for Salesforce is supported for use with Salesforce Classic and Salesforce Lightning Experience. The MiVoice Integration for Salesforce features are all fully embedded and integrated within the Salesforce web browser window. The functionality is the same for both Salesforce Classic and Salesforce Lightning Experience.

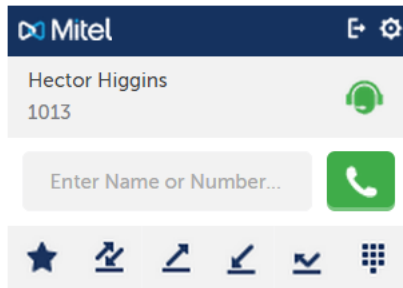
When using Salesforce Classic, the MiVoice Integration for Salesforce interface appears on the left-hand side of the Salesforce main screen.

When using Salesforce Lightning Experience, the MiVoice Integration for Salesforce interface appears as a tab at the bottom-left of the screen; click the tab to view the interface.

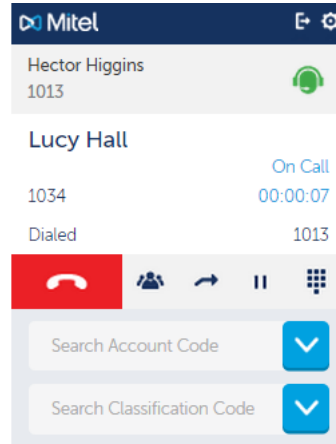


The appearance of the client changes based on your call status.

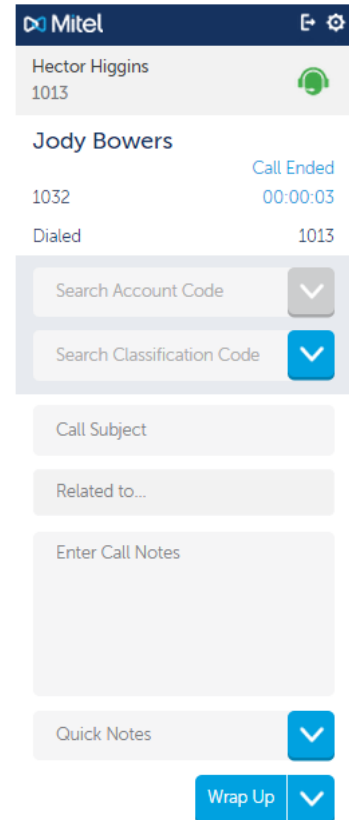
Idle State



Active Call



Call Complete



Use this document to help you with:





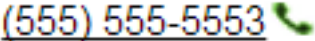
- “Configuring MiVoice Integration for Salesforce” on page 15
- “Using the MiVoice Integration for Salesforce Features” on page 22

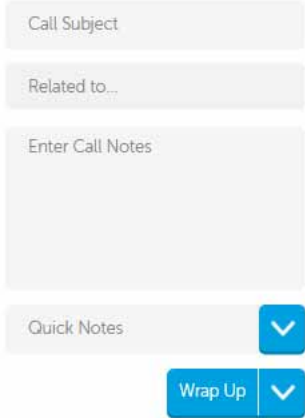
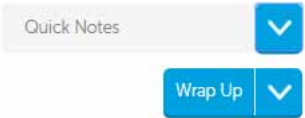


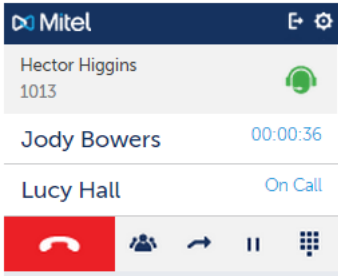

Important Notes:



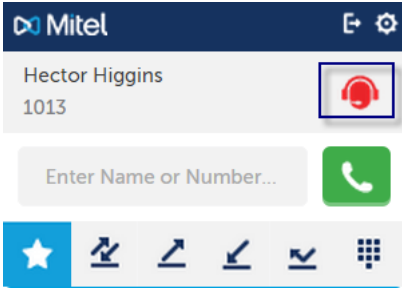
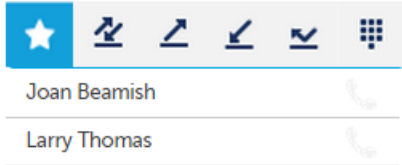


- Application behavior for SIP devices is not equivalent to the behavior of Mitel IP phones, including SIP devices that have been certified as Mitel-interoperable
- Mitel does not support SIP devices when using the MiVoice Integration for Salesforce.

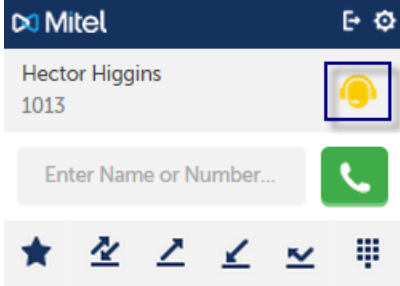





MiVoice Integration for Salesforce Feature List



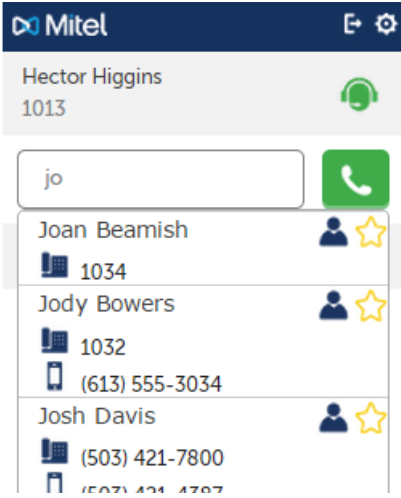


The following table lists all the features that are available in the MiVoice Integration for Salesforce interface.

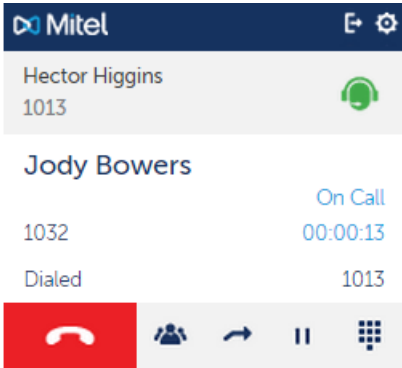


FEATURE	IDLE STATE	CALL ACTION	POST CALL	DESCRIPTION
Add favorite 	✓			Click the empty star icon to add a contact to your Favorites list from any call list. Click the solid star to remove the contact from your Favorites list. You can search for the contact to add and click the Favorites icon directly from the contact in the search list.
All calls 	✓			Click to see a list of all incoming, outgoing and missed calls, with the most recent call at the top of the list.
Answer call 		✓		Click to answer an incoming call.
Clear call 		✓		Disconnects and ends an active call. Post-call actions like entering logs and wrap-up actions are still displayed, if enabled by the administrator.
Click to dial (contacts) 	✓	✓	✓	In a Salesforce contact display, select the phone handset icon or click the phone number to dial the contact using that number.

FEATURE	IDLE STATE	CALL ACTION	POST CALL	DESCRIPTION
<p>Call notes</p> 		✓	✓	<p>Free form text field to add details about the call. You can type into the box, or use the Quick Notes icon to add Quick Notes from the predefined list.</p> 
<p>Click to dial (lists)</p> 	✓			<p>In the Favorites list or any recent call list, select the contact and click the phone number to dial the contact using that number. You can also click to dial from the results of a search.</p>
<p>Conference</p> 		✓		<p>During an active call, click Conference to search for and add others to the call for a group discussion. Up to 5 parties can be connected to a conference.</p>
<p>Conference details</p> 		✓		<p>All participants in a conference call are listed, along with their status.</p>
<p>Console view</p> 	✓	✓	✓	<p>In a Salesforce Console view, the MiVoice client is available by clicking the phone icon in the bottom right corner of the browser window.</p>

FEATURE	IDLE STATE	CALL ACTION	POST CALL	DESCRIPTION
<p>Consultation hold</p> 		✓		<p>Consultation hold is a call state that automatically happens when you start to conference or transfer a call. The active call is immediately held while you supervise the transfer or conference by connecting and consulting with the other party.</p>
<p>Contact record</p> 	✓			<p>Click the person icon to open the contact entry in Salesforce.</p>
<p>Do Not Disturb (DND)</p> 		✓		<p>To put the phone in Do-No-Disturb mode, click the agent/headset icon (shown in red when in DND). This is what you will see on your screen when you are in Do Not Disturb state.</p>
<p>Favorites</p> 	✓			<p>A list of favorite contacts, created by selecting contact names from any of the calls lists or from the results of a search. You can have a maximum of 50 favorites. They are listed in alphabetical order.</p>
<p>Hold call</p> 		✓		<p>Holds the active call. The call must be retrieved before you can transfer it or initiate a conference.</p>
<p>Dialpad</p> 	✓		✓	<p>Enter digits to initiate a call.</p> <p>Enter digits required to respond to prompts in an IVR system.</p>

FEATURE	IDLE STATE	CALL ACTION	POST CALL	DESCRIPTION
<p>Make Busy</p> 		✓		<p>To put the phone in Make Busy mode, click the agent/headset icon and choose the applicable reason code (shown in yellow when in Make Busy).</p> <p>This is what you will see on your screen when you are in Make Busy state.</p>
<p>Make call</p> 		✓		<p>Dials the contact or telephone number displayed in the search field.</p>
<p>Missed call history</p> 	✓			<p>Displays a list of the last 10 incoming calls from Salesforce contacts that were not answered.</p> <p>The list is sorted with the most recent missed calls at the top.</p>
<p>Multiple phone number matching</p>	✓			<p>Information for a contact can contain multiple phone numbers, and phone numbers can be applicable to multiple contacts.</p> <p>When there are multiple matches on an incoming call, Salesforce displays all of the matching contact records.</p> <p>Answer the call and click the relevant contact name.</p>
<p>Outgoing call history</p> 	✓			<p>Displays a list of the last 10 outgoing calls that were made to Salesforce contacts. This list is sorted with the most recent call at the top.</p>
<p>Quick notes</p> 		✓	✓	<p>Quick notes are pre-defined text strings that you can add to the call log. The Quick notes can be combined with text that you type into the call notes area.</p>
<p>Received call history</p> 	✓			<p>Displays a list of the last 10 calls from Salesforce contacts that were answered. This list is sorted with the most recent call at the top.</p>

FEATURE	IDLE STATE	CALL ACTION	POST CALL	DESCRIPTION
<p>Redirect call</p> 		✓		<p>While an incoming call is ringing, Redirect allows you to forward the call to another party without answering it first.</p>
<p>Retrieve call</p> 		✓		<p>Indicates that a call has been placed on hold. Click the icon to reconnect the call.</p>
<p>Search</p> 	✓	✓	✓	<p>A search bar integrated into the MiVoice client allows you to search names and numbers in your Salesforce contact database.</p> <p>With Edit Number to Dial enabled:</p> <p>Selecting one of the results will add the complete contact name into the search bar. You can edit the number if necessary. You can then dial the contact by clicking the green Call icon.</p> <p>With Edit Number to Dial disabled:</p> <p>Click the contact to dial immediately (one-click dial).</p>
<p>Settings</p> 	✓	✓	✓	<p>Opens the Settings window for configuring how MiVoice Integration and Salesforce work.</p>
<p>Transfer call</p> 		✓		<p>Connects the call to another party. The call is placed on hold while you dial the number to transfer to.</p> <p>For a supervised transfer, speak to the called party, and complete the transfer by clicking Transfer again.</p> <p>For an unsupervised transfer, hang up to complete the transfer. If the unsupervised transfer is not answered, it will be routed back to you.</p>

FEATURE	IDLE STATE	CALL ACTION	POST CALL	DESCRIPTION
<p>Visual indication</p> 		✓		<p>The information window shows the call status and the duration so far.</p> <p>When multiple parties are conferenced into the call, the status of each connection is displayed.</p>
<p>Wrap up call</p> 		✓		<p>Wrap up allows you to complete follow-up actions as part of completing a call.</p> <p>The allowed wrap-up actions are pre-configured by the system administrator.</p> <ul style="list-style-type: none"> Click Wrap Up: Completes Save & Exit wrap-up action. Click : Select one of the configured wrap-up actions. See “Wrap Up actions” on page 28.

Configuring MiVoice Integration for Salesforce

This section contains the following topics:

- “Setting your password and logging in for the first time” on page 7
- “Installing and validating Mitel Open Integration Gateway (OIG) self-signed certificate” on page 8
- “Enabling incoming call notifications in your browser” on page 10



Note: MiVoice Integration for Salesforce 2.0 introduces support for changing the language of the UI by changing your browser settings. Ask your system administrator about the language availability on your site.

Setting Your Password and Logging in for the First Time

New Salesforce users receive an email from support@salesforce.com containing login credentials for a Salesforce account. The email includes the following:

- Your user name
- The login URL


You will set your password the first time you log in.

When you receive the Salesforce email:

1. Click the login URL.
2. Enter your user name
3. Create your new password.
4. Log in to your Salesforce account.



Note: Once you are successfully logged in, the MiVoice user interface appears on the left side of the screen.

The  icon shown in your display indicates that the Mitel OIG server requires a CA certificate for MiVoice Integration for Salesforce to work correctly. To temporarily work around this issue, do the following:

1. Install and validate the Mitel self-signed certificate. See the instructions in the following sections or search the Internet for help with your browser.
2. In a separate browser window, enter the URL for the Mitel OIG (e.g. <https://10.40.224.117/server-manager>), and click Proceed when you see the prompt.
Your system administrator will be able to tell you the URL to use for the Mitel OIG.

You may have to repeat Step b. at each login until an administrator installs a CA certificate. Your browser will continue to deny self-signed certificates if they are not installed and validated.

5. Add the Salesforce login URL to your browser bookmarks or favorites.
6. Follow the on-screen instructions to simplify future log ins.

Installing and Validating Mitel Open Integration Gateway (OIG) Self-Signed Certificate

The Mitel OIG server requires a CA certificate for MiVoice Integration for Salesforce to work correctly. To temporarily work around this issue, use the following procedures, depending on the browser you are using.



Note: The following procedures are not required when the Mitel Open Integration Gateway (OIG) has a CA certificate (CA certificates are trusted in all web browsers).
The CA certificate will be installed by your system administrator.

- “Windows® Internet Explorer® (IE)” on page 16
- “Google™ Chrome™” on page 17
- Mozilla® Firefox® users: To run Salesforce and the MiVoice Integration for Salesforce in Firefox, install the certificate using a Chrome or Internet Explorer browser and then log in to Salesforce in Firefox.

Windows® Internet Explorer® (IE)

1. Browse to the Mitel OIG server site hosting the certificate to trust.
(<https://x.xx.xxx.xxx/server-manger>)
2. A message appears: “There is a problem with this website's security certificate.” “The Mitel OIG server requires a CA certificate for MiVoice Integration for Salesforce to work correctly. To temporarily work around this issue, do the following:”
3. Select **Continue to this website (not recommended)**.
4. Select **Tools > Internet Options**.
5. Select **Security > Trusted sites > Sites**.
6. Confirm the URL matches, and click **Add**.
7. Click **Close**.
8. Click **OK** to close the **Internet Options** dialog box.
9. Browse to the site again and re-type in the address field: <https://xx.xx.xxx.xxx/> - this is the same address as in step 1.
10. A message appears: “There is a problem with this website's security certificate.”
11. Click **Continue to this website (not recommended)**.
12. Click **Certificate Error** at the right of the address bar, and then select **View certificates**.
13. Click **Install Certificate**.
14. In the wizard, click **Next**.

15. On the next page select **Place all certificates in the following store**.
16. Click **Browse**, select **Trusted Root Certification Authorities** and then click **OK**.
17. In the wizard, click **Next** and then click **Finish**.
18. If you get a Security Warning message box, click **Yes**.
19. Click **OK** to dismiss the message box.
20. Select **Tools > Internet Options**.
21. Select **Security > Trusted sites > Sites**.
22. Select the URL you just added, click **Remove** and then click **Close**.
23. Shut down all running instances of Internet Explorer, and then restart Internet Explorer again.
24. The site certificate is now trusted.



Note: Internet Explorer version 10 or later is required.
Contact your system administrator for assistance.

Google™ Chrome™

1. Point to the OIG server IP address.
2. In the screen that appears, click on **Proceed Anyway**.
3. Click the lock icon:



4. Click **Certificate information**.



The identity of this website has not been verified.
• Server's certificate is not trusted.
[Certificate information](#)

5. Navigate to the **Details** tab.
6. Click **Copy to File**.
7. Click **Next**.
8. Select **DER encoded binary X.509**, and then click **Next**.
9. Click **Browse**, and then browse to a desired folder.
10. Enter a file name for the certificate (for example, *oig141_cert*), and then click **Save**.
11. Click **Next**.
The file is saved using the filename you entered in step 10. Take note of the full path where it is saved.
12. Click **Finish**.

13. Use Windows Explorer to browse to where the file was saved.
14. Right-click the file, and then select **Install Certificate**.
15. Click **Next**.
16. Select **Place all certificates in the following store**.
17. Click **Browse**.
18. Select **Trusted Root Certification Authorities**.
19. Click **Next**.
20. Click **Finish**.
21. Click **Yes** if prompted for confirmation.



Note: Google Chrome version 31 or later is required. Contact your system administrator for assistance.

Enabling Incoming Call Notifications in Your Browser

Chrome and Firefox browsers support notifications to alert you to an incoming call. Browser notifications are helpful when MiVoice Integration for Salesforce client is not visible on the screen. The MiVoice client may be hidden for a variety of reasons. Enabling browser notifications will help you in the following situations:

- You have scrolled down in the Salesforce window and the MiVoice client is pushed off the top of the screen.
- You are working on another browser tab and the Salesforce tab is not the current tab.
- You have minimized your browser windows.



Note: Microsoft Internet Explorer does not support browser notifications.

The following sections provide support for configuring your browser notifications.

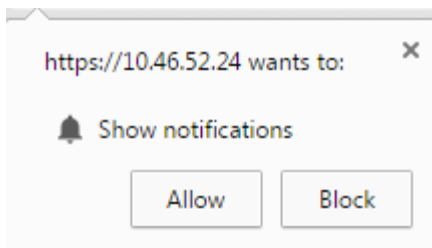
- “Browser Notifications in Chrome” on page 19
- “Browser Notifications in Firefox” on page 19
- “Clearing Notification Settings in Chrome” on page 20
- “Clearing Notification Settings in Firefox” on page 21



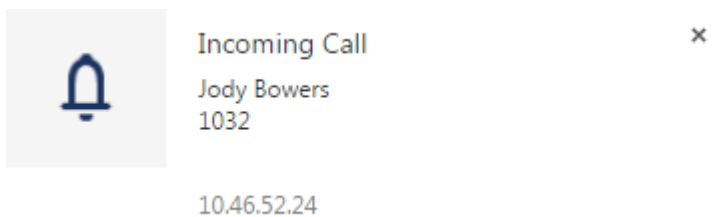
Note: Browser call notifications in Chrome are alerts only. You cannot answer the call by clicking on the browser pop-up notification. When you are notified of an incoming call, answer the phone by maximizing or selecting the MiVoice Integration for Salesforce browser tab and clicking the Call icon or answer using your physical phone.

Browser Notifications in Chrome

1. From the Chrome menu, click **Settings**.
A new tab opens.
2. Click **Show advanced settings** at the bottom of the page.
The page expands to include more categories and settings.
3. Under **Privacy**, click **Content settings**.
4. Scroll to the **Notifications** section.
5. Select **Ask when a site wants to show desktop notifications (recommended)**.
A dialog box will appear if an incoming call is received and the notification rules for MiVoice Integration for Salesforce have not been set.



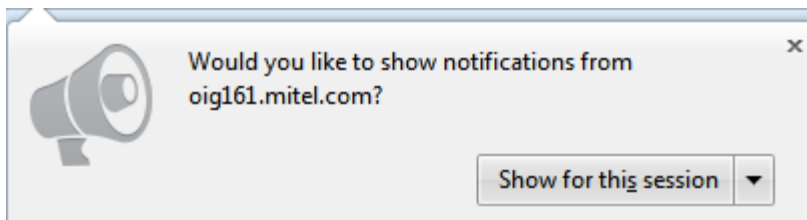
6. Click **Allow** to enable notifications.
You will now be notified of incoming calls with a pop-up dialog box.



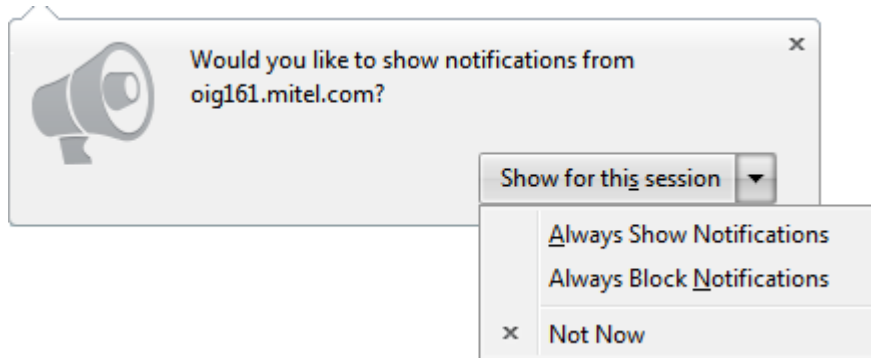
Note: Selecting **Block** will prevent you from being notified of incoming calls.
See "Clearing Notification Settings in Chrome" on page 20 for information about resetting your notification settings.

Browser Notifications in Firefox

1. A notification dialog appears in the top of the browser window when an incoming call is received and the notification rules for the MiVoice Integration for Salesforce have not been set.

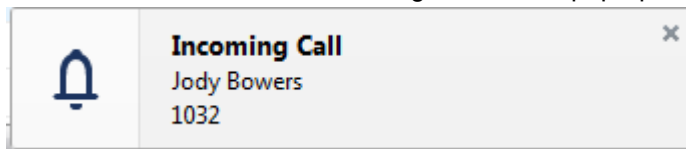


2. From the **Show for this session** menu, select **Always Show Notifications**.



Note: Selecting Always Block Notifications will prevent you from being notified of incoming calls.

You will now be notified of incoming calls with a pop-up dialog box.

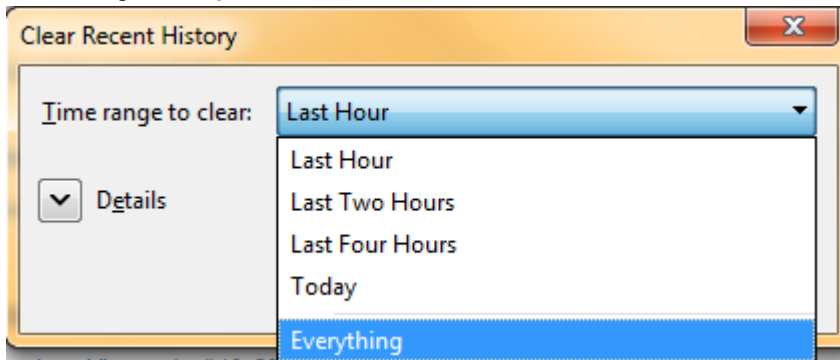


Clearing Notification Settings in Chrome

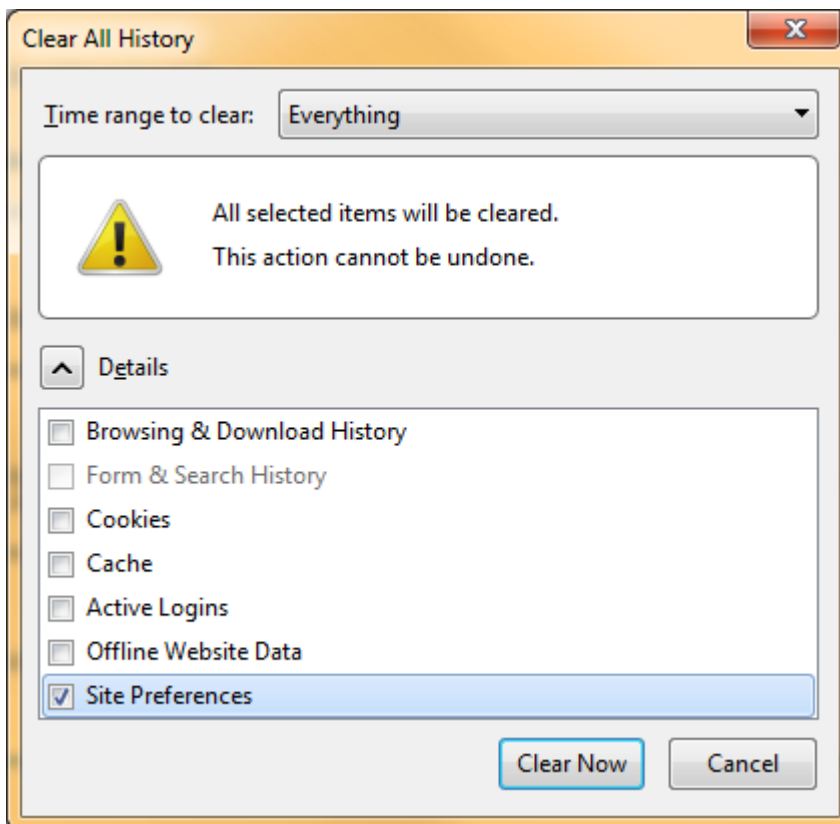
1. From the Chrome menu, click **Settings**.
2. Click **Show advanced settings** at the bottom of the page.
The page expands to show more categories and settings.
3. Under **Privacy**, click **Content settings**.
The tab refreshes with a new dialog window.
4. Scroll down to the **Notifications** section.
5. Click **Manage Exceptions**.
The screen refreshes with a list of notification exceptions.
6. Select the exception with **OIG** in the name.
The notification exception is highlighted, with an **X** appearing at the very far right of the row.
7. Click the **X** to remove the notification exception.
The exception is removed from the list.
8. Click **Done**.
The **Content Settings** menu reappears.
9. Click **Done**.
10. Close the **Settings** tab.
You will be prompted to set your notification settings again when a new incoming call arrives.

Clearing Notification Settings in Firefox

1. From the Firefox menu, select **History > Clear Recent History**.
Alternatively, press **Ctrl+Shift+Del** with the Firefox browser window open.
A dialog box appears.
2. In the **Time range to clear** drop-down list, select **Everything**.
The dialog box expands and checked items are cleared.



3. Select the **Site Preferences** check box.



4. Clear the check box for any other history items that you do not want to clear.
5. Click **Clear Now**.
The dialog box closes and you are prompted to set your notification settings again when a new call arrives.

Using the MiVoice Integration for Salesforce Features

This section provides instructions for using MiVoice features to make the most effective use of the MiVoice Integration for Salesforce.

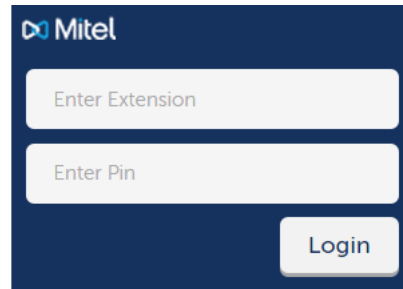
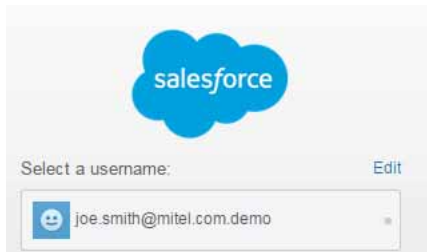
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- “Managing your Interface” on page 24
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- “Directing Calls” on page 27
 - “Placing a Call” on page 28
 - “Answering a Call” on page 28
 - “Redirecting an Incoming Call” on page 29
 - “Ending a Call (Clear)” on page 29
 - “Canceling the Work Timer” on page 30
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 - “Adding and Removing Contacts from the Favorites List” on page 34
- “Managing Call Data” on page 34
 - “Classification Codes and Account Codes” on page 34
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 - “Wrap Up Actions” on page 35

Logging In

The login steps are different, depending on your user profile.

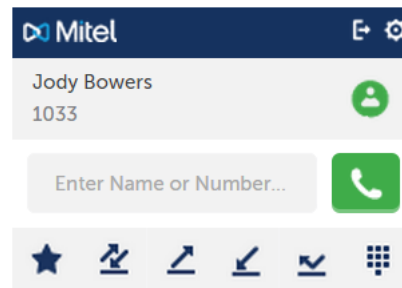
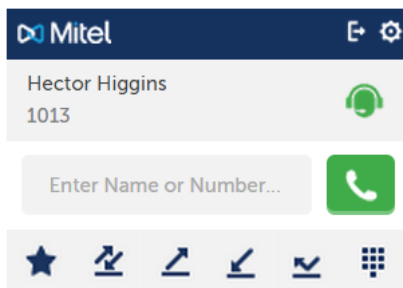
Table 1:

SALESFORCE USE WITH REGULAR PHONE	SALESFORCE USER HOT DESKING INTO PHONE
<ul style="list-style-type: none"> Log in to Salesforce 	<ul style="list-style-type: none"> Log in to Salesforce Log in to MiVoice Integration for Salesforce.






You will see a display like one of these. The display you see depends on the options purchased for MiVoice Integration for Salesforce and how your system administrator has set up your profile.

Note the difference in the icon next to the name of the logged-in Salesforce user. For regular users, the person icon is shown, while for hot desking, the headset icon is shown.



There are three different types of users, and the interface and available features are different for each:

- Regular user: A regular agent sees the interface on the left, with the exception of the log out button , which does not appear for regular agents.
- Hot desk agent: A hot desk agent sees a screen like that shown for Judy Bowers, on the left, with the person icon .
- ACD agent: An ACD agent has additional capabilities, and the interface is like that shown for Hector Higgins, above-right. This interface is shown with the headset icon . There are also two types of ACD agents. Depending on the options purchased by your company, ACD agents may or may not have access to the following features: Make Busy Reason codes, Account codes, and Classification codes.

Managing your Interface

You can customize your Salesforce behavior for incoming calls, and screen pops.




Note: You should receive instructions for the correct settings when you are given your log-in information. If you are unsure, ask your system administrator

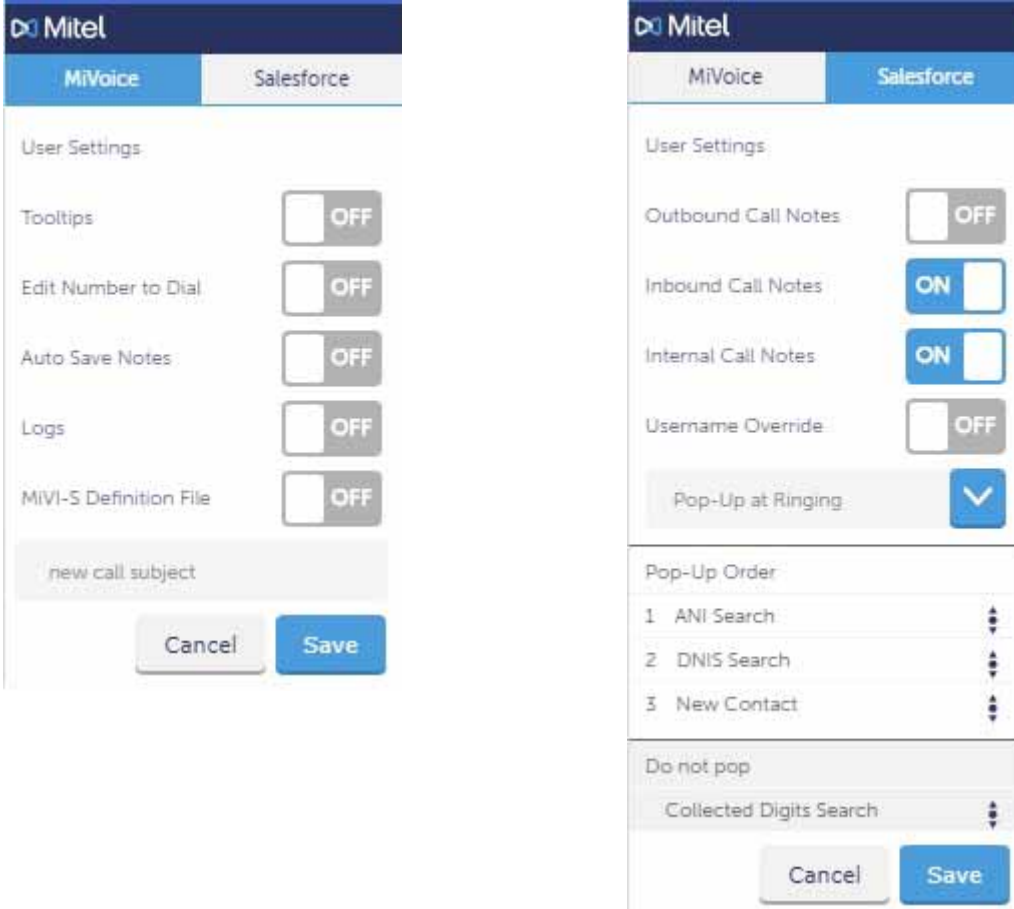
MiVoice Integration for Salesforce Views

The MiVoice Integration for Salesforce client is displayed on the in the top left corner of the Salesforce window when Salesforce is operating in Standard Mode (call center, sales, marketing, and so on). Switching Salesforce tabs does not interrupt the call. Minimizing your browser does not affect your call, either. If you navigate to a tab that does not display the client, continue working and then return to the tab that displays the MiVoice Integration for Salesforce client to manage your call or enter call data.

In addition to the default Salesforce standard mode; that is, call center view, the MiVoice Integration for Salesforce client is also available in the Salesforce Console mode. You can launch the MiVoice client by clicking the Console tab in the top right corner of the Salesforce window. Depending on how you have customized your display, you may or may not see the Console tab.

MiVoice Integration for Salesforce Settings

There are two Settings screens built into your MiVoice Integration for Salesforce UI. You get to these Settings screens using the Settings icon, , in the top right corner of the UI.



The image displays two side-by-side screenshots of the MiVoice Integration for Salesforce settings interface. Both screens have a dark blue header with the Mitel logo and two tabs: 'MiVoice' and 'Salesforce'.

The left screenshot shows the 'User Settings' screen. It contains five toggle switches, all currently set to 'OFF': 'Tooltips', 'Edit Number to Dial', 'Auto Save Notes', 'Logs', and 'MIVI-S Definition File'. Below these is a text input field labeled 'new call subject' and two buttons: 'Cancel' and 'Save'.

The right screenshot shows the 'Salesforce' settings screen. It contains several settings: 'Outbound Call Notes' (OFF), 'Inbound Call Notes' (ON), 'Internal Call Notes' (ON), and 'Username Override' (OFF). Below these is a 'Pop-Up at Ringing' dropdown menu with a downward arrow. The 'Pop-Up Order' section lists three items: '1 ANI Search', '2 DNIS Search', and '3 New Contact', each with a vertical double-headed arrow for reordering. Below this is a 'Do not pop' checkbox and a 'Collected Digits Search' dropdown menu. At the bottom are 'Cancel' and 'Save' buttons.

In the **MiVoice** tab, use the settings as follows:

- **Tooltips:** With Tooltips on, you will see a description of each button on the UI when you hover over it.
- **Edit Number to Dial:**
 - With **Edit Number to Dial** enabled: Selecting one of the results will add the complete contact name into the search bar. You can edit the number if necessary, and then dial the contact by clicking the green Call icon.
 - With **Edit Number to Dial disabled:** Click the contact to dial immediately (one-click dial)
- **Auto Save Notes:** With this option turned on, Call Notes are saved if you have entered notes during a call. Then the call ends.
- **Logs:** Enable when instructed to collect logs for use in troubleshooting by your system administrator.
- **MIVI-S Definition File:** The default for this option is OFF. This option is used only once by the Administrator to download the definition file for the Salesforce Lightning Experience Upgrade. Once

switching this setting to ON, the Administrator must click Save to download the definition file; the option then automatically reverts to OFF.

- **Call Subject:** You can type a default Call Subject here for use in Call Notes.

In the Salesforce tab, you can set how the call notes and incoming call screen pops work:

- **Outbound Call Notes:** When this option is enabled, you will see the Call Notes fields during outbound calls.
- **Inbound Call Notes:** When this option is enabled, you will see the Call Notes fields during inbound calls. This field must also be enabled to activate the Calls Lists.
- **Internal Call Notes:** When this option is enabled, you will see the Call Notes fields during internal calls. This field must also be enabled to activate the Calls Lists.



Note: If all Call Notes options are turned OFF, no call logs will be saved in Salesforce.

- **Username Override:** This option is disabled by default. Consult with Product Support and test in a sandbox environment before enabling. This option works in conjunction with MiCC. All users in the Salesforce organization must have the same setting in order for this to function properly, and each user must apply the setting individually.
 - When this option is enabled, the Salesforce Username for each user must match the user's MiCC Employee Email.
 - When this option is disabled, the Salesforce User Email for each user must match the user's MiCC Employee Email.
- **Pop-Up at Ringing / Pop-up at Answered:** You can decide whether you would like to have the incoming call contact record popped to the screen as the phone is ringing, or only after you answer it.
- **Pop-Up Order:** This section of the Settings is used to set the order Salesforce uses to search for contact records to pop. Use your mouse to drag the call pop type to its proper position. If there is a type of call for which you don't want a screen pop, drag it to the Do not pop section below. You may receive instructions for the correct screen pop setting when you are given your log-in information. If you are unsure, ask your system administrator.



Note: Record pop behavior changes by Salesforce Mode:

- In Standard Mode: The first match found is popped.
- In Console Mode: Every match is popped, each in its own tab.
- **ANI Search** (Pop Contact record): Pops the contact page based on the caller phone number, or ANI (Automatic Number Identification).
- **DNIS Search** (Pop Campaign record): If the caller calls in on a Salesforce campaign line, this matching selection pops the campaign page. (DNIS is the Dialed Number Identification Service.)
- **Collected Digits Search** (Pop Configured record): This option is available only when MiVoice Integration for Salesforce is integrated with Mitel MiContact Center. This allows a Case record screen pop based on the digits typed by the caller in choosing the call queue.
- **New Contact:** Pop the Salesforce New Contact window.

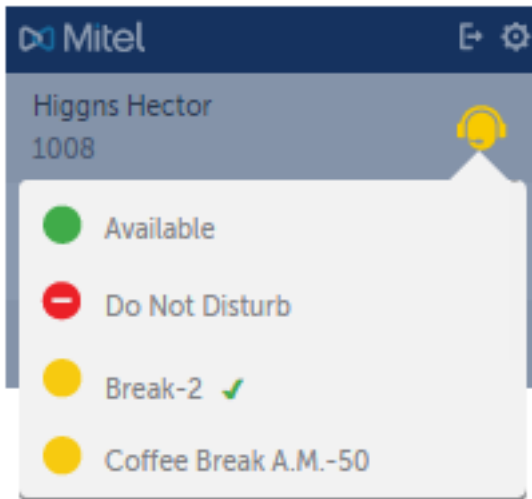
- **Do not pop:** If there is a call type for which you don't want a screen pop, drag the call type into this section.

Setting and Canceling Make Busy and Do Not Disturb

To change your Make Busy and Do Not Disturb settings, click the agent icon on the MiVoice for Salesforce UI, and select the appropriate reason code. Some notes:

- Do Not Disturb takes precedence over Make Busy.
- When Make Busy is activated, the agent symbol is shown in yellow.
- When Do Not Disturb is activated, the agent symbol is shown in red.
- The currently active reason code is shown with a check mark.

The reason codes are pre-programmed by your system administrator. Reason codes may not be supported on your system.



Need new screen shot
(copied from PDF)

Directing Calls

The following sections provide step-by-step instructions for managing calls.






Note: When a connected party hangs up while you are creating a consultation call to a third party, you are only presented with a disconnect call option only after you connect to the third party. For example, hold, conference, transfer, and dialpad options will not be visible.

Click the **Clear** (Hang-up) icon and choose a Wrap Up option, if necessary, to return your phone to the idle state.

Placing a Call

Use one of the following options to place a call:

- Enter a name or number in the search field, select one of the matching results and click the contact phone number or the Call icon .
- Select an entry from the **Favorites** list or the **Missed**, **Received**, or **Dialed** recent history lists, and then click .
- Click the dialpad icon, , and dial the number using the mouse.



Pre-defined dialing prefixes are configured by your system administrator.

Answering a Call

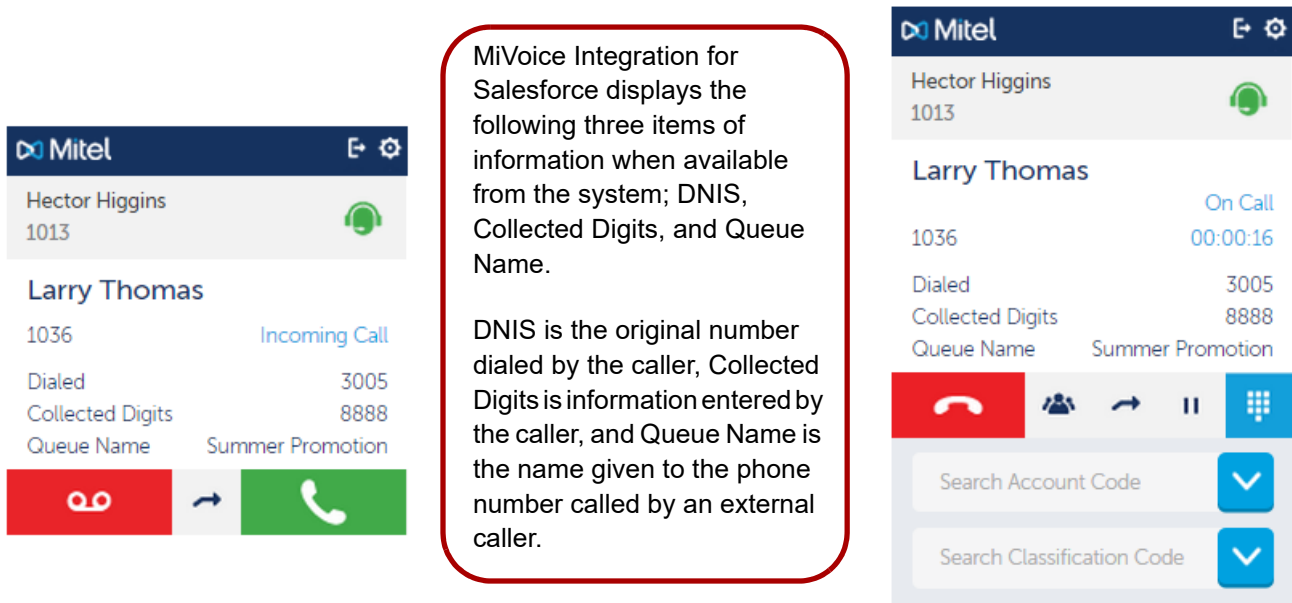
Incoming calls automatically display Salesforce contact details, if they are available with the incoming call. If there are multiple matches for the incoming number, Salesforce displays all of the potential contact matches. After answering the call, you can select the appropriate contact in Salesforce to activate call notes and other contact-specific features.

If you have your UI set to pop a New Contact window for unknown callers, you will be able to quickly create a new contact record for new callers.

When an incoming call arrives you can:

- Answer the call by clicking the Call icon, .
If there are multiple contact matches, select the correct contact record in Salesforce after you identify the caller.
- Redirect the call to someone else by clicking the Redirect icon, .



In-progress calls can appear in different ways. Two examples are shown below.



Redirecting an Incoming Call

Call Redirect allows you to forward an incoming call to someone else without answering the call.

When the incoming call is ringing:

1. Click the Redirect icon,  .
The caller continues to hear ringing.
2. Connect the call to another party by doing one of the following:
 - Type the person's name or number in the search window, and then click the Call icon, .
 - Look up the contact in Salesforce and use the Click-to-dial function.
3. The call now rings the person you redirected it to and you are removed from the call.

Redirected calls are not logged to a Contact activity record.

Ending a Call (Clear)

Ending a call disconnects you (hangs-up) from the other party.

- Click the Clear Call icon, , to terminate the call connection.

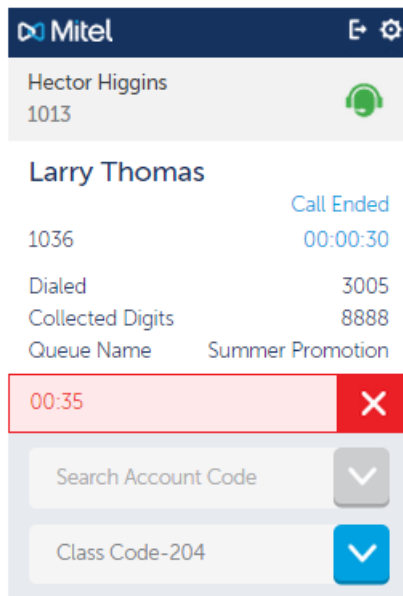
Call logs, Wrap up actions, and the Work Timer may still be active. Dealing with these in some way is necessary before your UI returns to the idle state.

Canceling the Work Timer

Depending on the programming of your system and the properties of the caller, the system may start a Work Timer when the current call is complete. The Work Timer may appear with or without the Call Notes.




There are two ways to clear the Work Timer:

- Complete your post-call work. Click the red X icon to clear the Work Timer.
- Use the Wrap-up actions to automatically cancel the Work Timer when saving Call Notes. Your phone is now free for your next call.



Holding a Call



Clicking the Hold icon temporarily parks the call, and the held party hears music (if configured), and waits for you to return to the call. The call automatically rings back to you if the hold exceeds the maximum hold time configured by your system administrator. You cannot forward or conference a call that is in a hard-hold state.

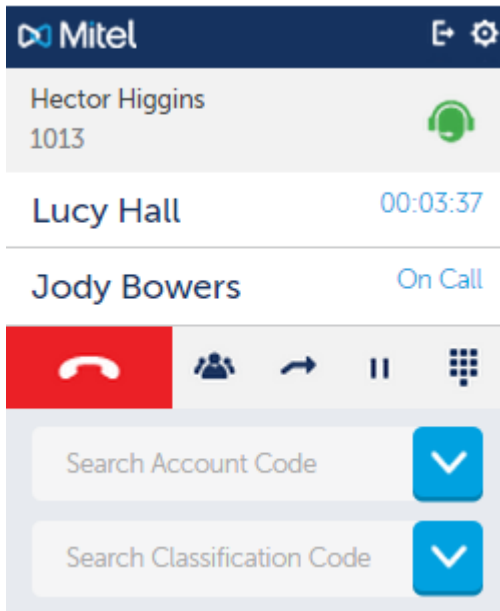
1. Click the Hold icon, , to place the active call on hold.
2. Click the Retrieve icon, , to resume the call.
3. If the call was on hold for too long and is ringing back to you, click the Answer icon, , to reconnect to your caller.

Conferencing

Creating a conference allows up to five parties to participate in a call. Each conference participant is displayed in the call information window.

1. Click the conference icon, .

2. Call a new participant by doing one of the following:
 - Type their name or number in the **Search** window and click the contact number of the Call icon, .
 - Look up the contact in Salesforce and use the Click-to-dial function (if configured).
3. Click the Conference icon, , again to connect the original parties and the new conference participant.
The original parties are automatically taken off hold.
4. Repeat the process for each conference attendee that you want to add.



When another MiVoice Integration for Salesforce user receives a request to join a conference, the called person is also able to use call notes if their Call Notes option is enabled and if the caller is also a Salesforce contact.



Note: You can click the Conference icon at anytime, even before the new participant answers, but you cannot disconnect individuals once they have joined the conference.

Adding a participant before they answer risks:

- All participants hear ringing until the call is answered.
- All participants hear a busy signal and the conference must be ended and restarted.
- The call goes to a voicemail system and records minutes of the conversation or until the conference ends.
- The call is answered by a PTSN auto attendant with a continuously looped error message. The entire conference must be ended and restarted.

Transferring a Call



Transferring a call allows you to remove yourself from a call and forward it to someone else.

- **Supervised transfers:** In a supervised transfer, you wait for the new party to pick up before transferring the call.
- **Unsupervised transfers:** A transfer is unsupervised if you start the transfer process and then immediately drop the call before the new party answers. If an unsupervised transfer fails, the call is rerouted back to you as an incoming call.

When you transfer a call with another MiVoice Integration for Salesforce contact, you will be able to enter call notes if the Call Notes option is enabled in your installation.

When a MiVoice Integration for Salesforce user receives a transferred call, the called person is also able to use call notes if their Call Notes option is enabled and if the caller is a Salesforce contact.

To transfer a call:


1. Click the Transfer icon, .
The active call is put on hold.
2. Call a new participant by doing one of the following:
 - Type their name or number in the search window and click the Call icon, .
 - Look up the contact in Salesforce and use the Click-to-dial function.
3. If you are already connected to the calling party, you must now click the Transfer icon again.



The call continues between the other two parties.

Using the Keypad

A virtual keypad is available during calls to send tones (DTMF signals). For example, you may need to enter digits on the keypad to answer prompts during a call.

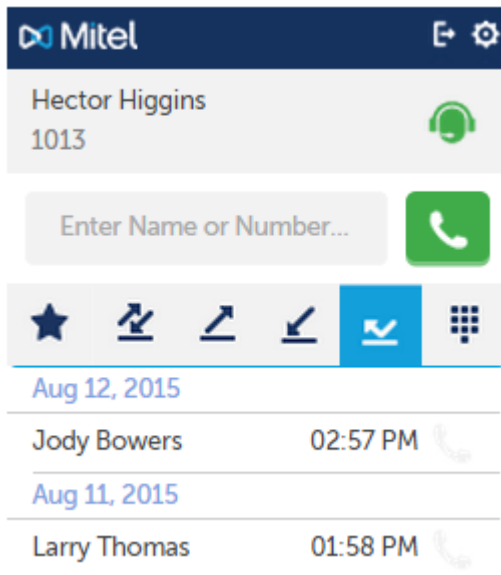
Press the Keypad icon, , to turn the dial pad display on or off during a call.

Managing Contacts




Contacts are displayed in both Salesforce and the MiVoice Integration for Salesforce client. The MiVoice client allows you to store 50 contacts as Favorites to always be displayed at the top of the list. All other contacts are sorted alphabetically.

Viewing Call History

The MiVoice Integration for Salesforce client maintains three call history lists: recent missed, incoming, and outgoing calls.



The most recent calls are displayed at the top of the lists. You can see the call history lists only when your UI is in Idle state.

- Click the Missed Call icon, , to see incoming calls that were not answered.
- Click the Outgoing Call icon, , to see calls that you made; both completed and not completed.
- Click the Incoming Call icon, , to see calls that you answered.

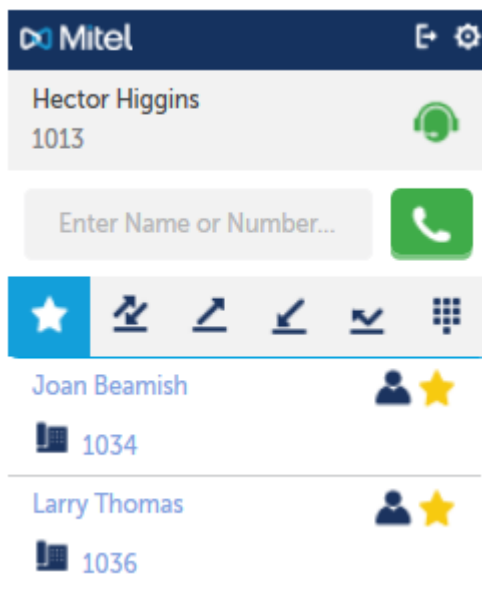
The MiVoice Integration for Salesforce client processes calls for which there is a matching Salesforce contact. Complete call records include time, date, length of call, and so on. There are call scenarios in which the MiVoice Integration for Salesforce cannot generate complete call records. Scenarios that may result in missing or incomplete records include:

- A missed call matches multiple contacts.
- A missed call does not match any Salesforce contact.
- An answered call has no Salesforce contact match and you didn't enter any information.
- An answered call has multiple Salesforce contact matches but you did not select a match.
- An answered call is associated with an internal user that is not a Salesforce contact.
- You have multiple tabs open with the same solution in one web browser; that is, if you are running the same phone number from more than browser window or tab.

Adding and Removing Contacts from the Favorites List

Contacts can be added as favorites from any of the three recent call lists or from the search results. Adding a contact as a favorite does not change how they appear in Salesforce.

1. Select one of the recent call lists (missed, outgoing, received).
2. Select the contact to add.
3. Select the star icon, ☆, for an entry to add that contact as a favorite.
4. Any contact entry in the list with the sold icon, ★, is already in your Favorites. To remove the contact from the Favorites list, click the Favorites icon.
5. Click the person icon beside the contact name to display the contact details.



Managing Call Data

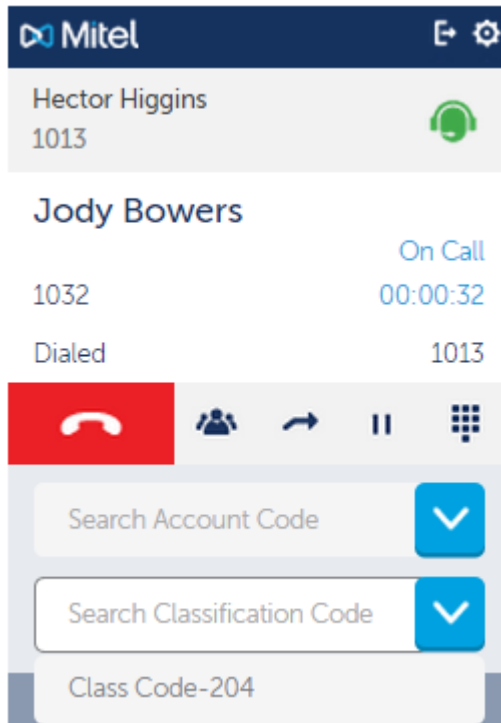
You can document calls using notes and logging features both during a call and after the call. When enabled by the administrator, Quick notes and comprehensive call log details can be automatically saved to the contact record. Wrap-up actions can automatically create follow-up items for when the call is completed.

Classification Codes and Account Codes

If Classification codes and/or Account codes are configured in your system, you may be required to select these codes before completing a call. If Classification codes are required in your system, you will not be able to cancel the Work Timer until you have selected a Classification code for the call. Note the following conditions:

- Account Codes are shown for ACD agents.

- Classification Codes are shown for classifying incoming ACD calls.



Logging Call Notes

A call log dialog opens when a call with a known contact is established. The call log can include a combination of typed notes and inserted predefined quick notes.

Wrap Up Actions

Enter you call notes and choose a Wrap Up action to complete the call.

