

MiVoice Integration for Salesforce

Troubleshooting Guide
Software Release 2.1

December 2016

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This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit (<http://www.openssl.org/>). This product includes cryptographic software written by Eric Young (eay@cryptsoft.com). This product includes software written by Tim Hudson (tjh@cryptsoft.com).

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MiVoice Integration for Salesforce
Release 2.1
Doc Release 2.0 - December 2016

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

User Issues

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• Users do not have full access to the MiVoice Integration (Creating a custom Salesforce User Profile)	7
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Display Issues

Symptom	See page:
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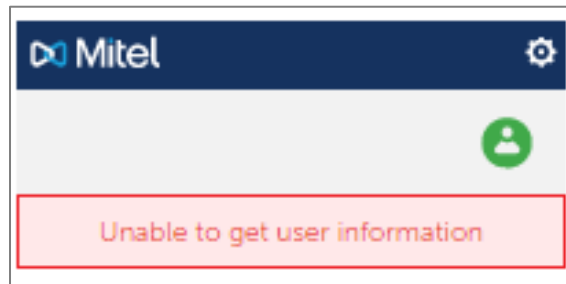
User Issues

This page is intentionally blank.

Unable to Get User Information

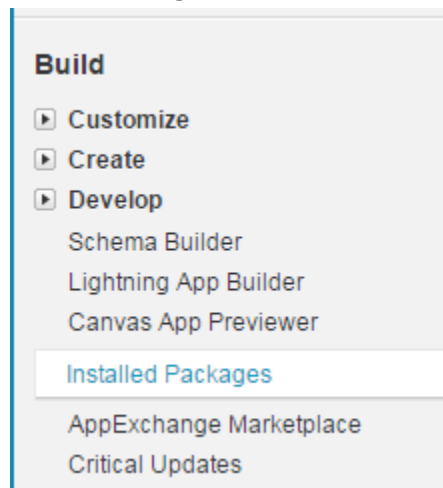
Symptom:

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




Corrective Action:

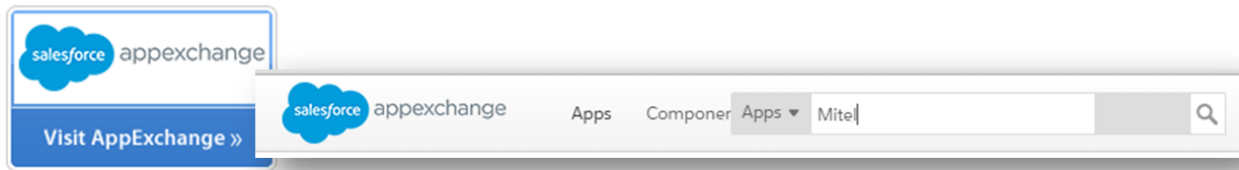
1. Log in as Salesforce Administrator.
2. Click **Setup > Build > Installed Packages**.



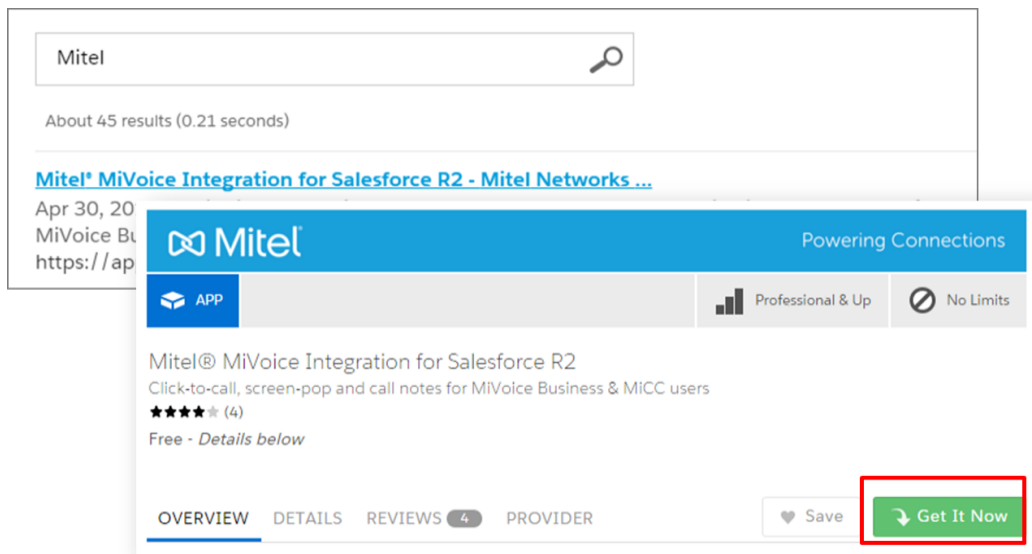
3. Check that MiVoice Integration version number **2.1** is listed in the Installed Packages section:

Installed Packages				
Action	Package Name	Publisher	Version Number	Na
Uninstall 	MitelMiVoiceIntegration	Mitel	2.1	Mit
Description Mitel MiVoice Integration Managed Package				

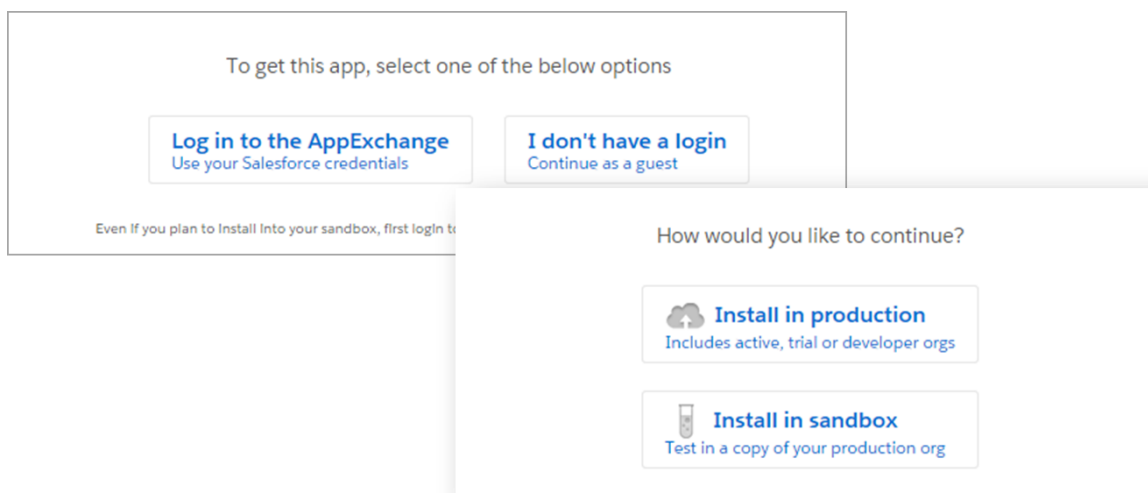
4. If MitelMiVoiceIntegration 2.1 is **not** listed, visit AppExchange and search for “Mitel”.



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

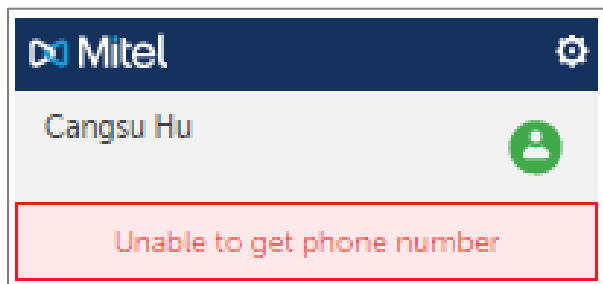
10. Refer to the ***MiVoice Integration for Salesforce Administration Guide*** for instructions to set up a call center for each user.

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

Unable to Get Phone Number

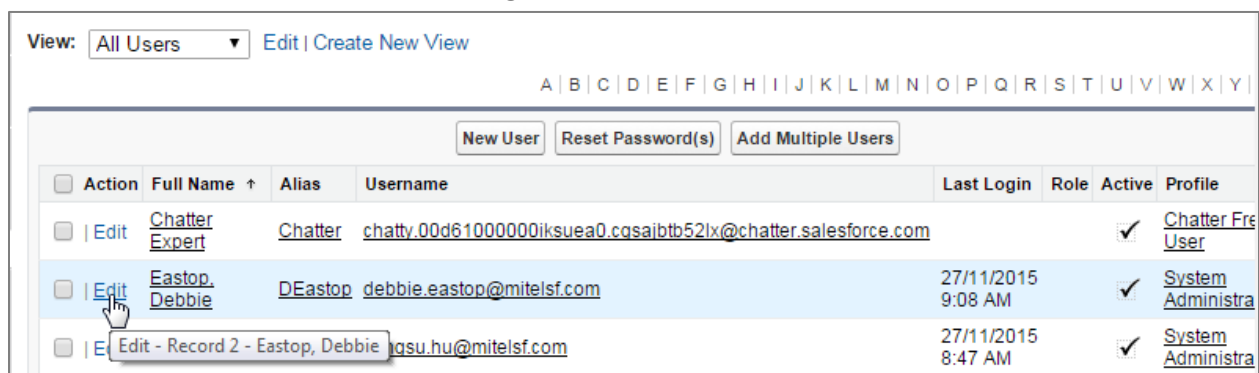
Symptom:

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



Corrective Action:

1. Log in as Salesforce Administrator.
2. Click **Setup > Administer > Manage Users > Users > Edit the user**



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



Access Issues - Create a Custom Salesforce User Profile

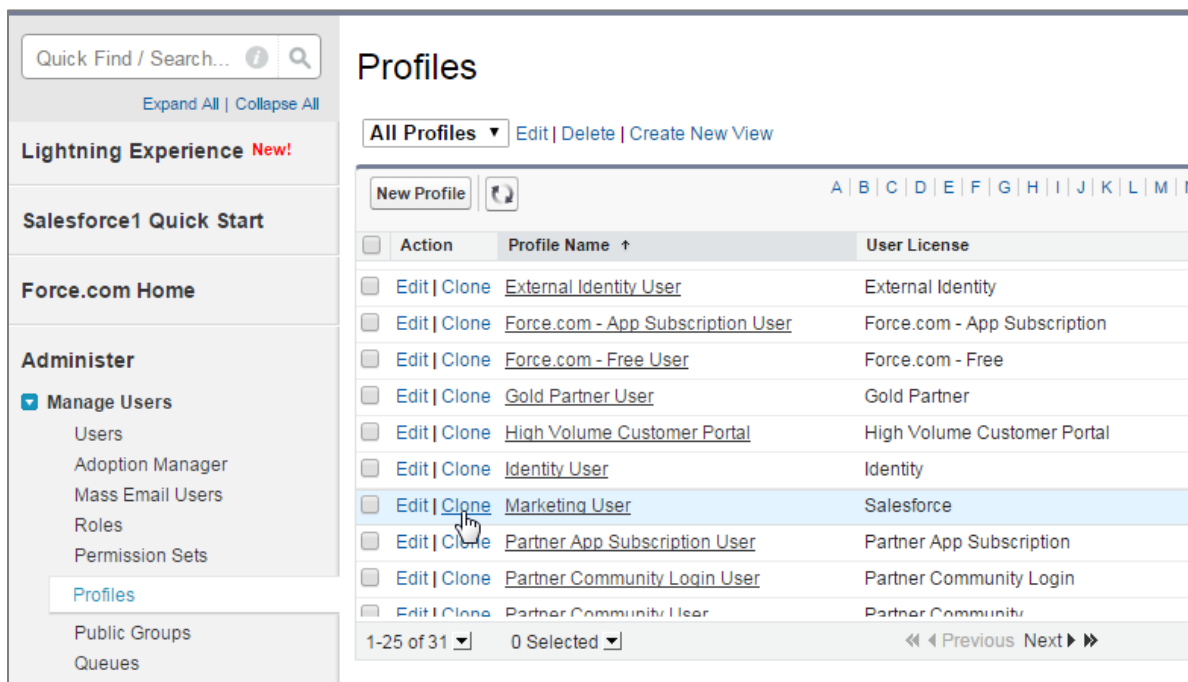
Symptom:

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.

Corrective Action:

Clone a custom profile from an existing profile.

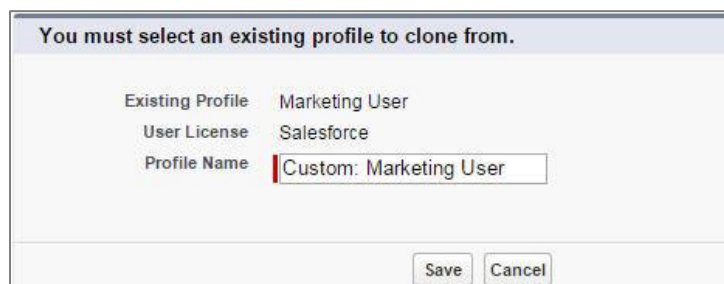
1. Log in as Salesforce Administrator.
2. Click **Setup > Administrator > Manage Users > Profiles**.
3. Find the profile you want to clone and then click the associated **Clone** link.



The screenshot shows the Salesforce 'Profiles' page. On the left, the 'Administer' section has 'Manage Users' selected, with 'Profiles' listed below it. The main area displays a table of profiles. The 'Marketing User' profile is highlighted, and the 'Clone' link is being clicked.

Action	Profile Name	User License
Edit Clone	External Identity User	External Identity
Edit Clone	Force.com - App Subscription User	Force.com - App Subscription
Edit Clone	Force.com - Free User	Force.com - Free
Edit Clone	Gold Partner User	Gold Partner
Edit Clone	High Volume Customer Portal	High Volume Customer Portal
Edit Clone	Identity User	Identity
Edit Clone	Marketing User	Salesforce
Edit Clone	Partner App Subscription User	Partner App Subscription
Edit Clone	Partner Community Login User	Partner Community Login
Edit Clone	Partner Community User	Partner Community

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



The dialog box titled 'You must select an existing profile to clone from.' contains the following information:

- Existing Profile: Marketing User
- User License: Salesforce
- Profile Name: Custom: Marketing User

At the bottom, there are 'Save' and 'Cancel' buttons.

5. Scroll down to the Field Level Security section and click the [View](#) link beside **Account**.

Field-Level Security

Standard Field-Level Security

Account	[View]	Idea	[View]
Asset	[View]	Lead	[View]
Campaign	[View]	Macro	[View]
Campaign Member	[View]	Metric	[View]
Case	[View]	Opportunity	[View]
Coaching	[View]	Opportunity Product	[View]
Contact	[View]	Order	[View]
Contract	[View]	Order Product	[View]
Duplicate Record Item	[View]	Performance Cycle	[View]
Duplicate Record Set	[View]	Price Book	[View]
Event	[View]	Price Book Entry	[View]

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

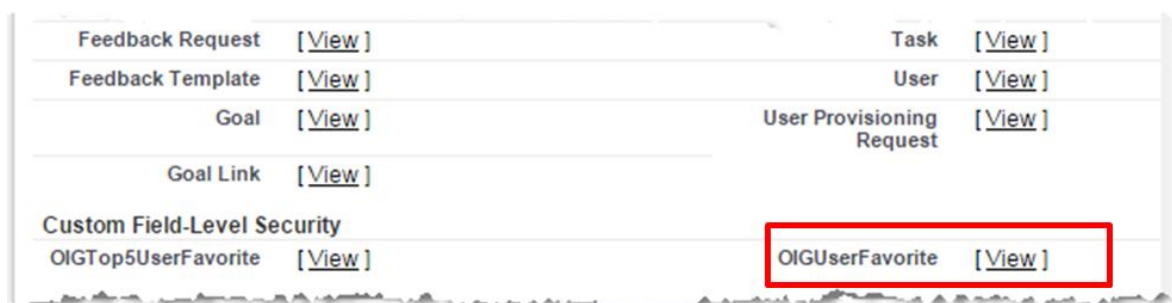
[Edit](#) [Back to Profile](#)

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 [View]	Campaign Name	Text	✓
	DNIS	Phone	✓
Case [View]	Case Number	Auto Number	✓
	Subject	Text	✓
Contact [View]	Account Name	Lookup	✓
	Home Phone	Phone	✓
	Mobile	Phone	✓
	Name	Name	✓
	Phone	Phone	✓
Lead [View]	Company	Text	✓
	Name	Name	✓
	Phone	Phone	✓
Opportunity [View]	Opportunity Name	Text	✓
Task [View]	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			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		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"/>	Goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>	Goal Links	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>	Ideas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input 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"/>	Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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"/>	Macros	<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"/>	Metrics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>	Metric Data Links	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>	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

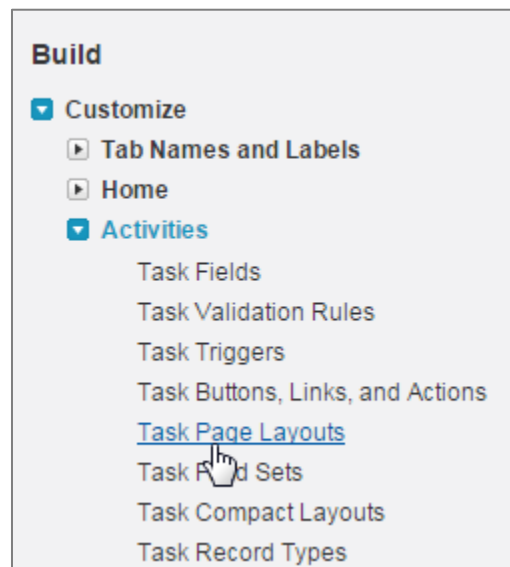
Symptom:

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

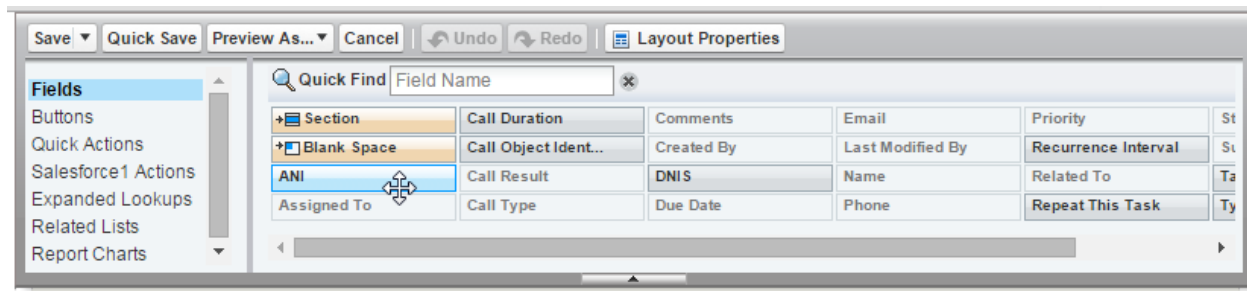
1. Log in as Administrator.
2. Click **Setup > Build > Customize > Activities > Task Page Layouts**.



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	
		Edit Delete Delete Series Create Follow-Up Task 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	Sample Contract
🔒 Call Duration	40,266	DNIS	1-415-555-1212
🔒 Call Type	Sample Call Type	🔒 Phone	1-415-555-1212
★ ● Assigned To	Sample User		
● Name	Sample Contact		

- 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

- While still logged in as Administrator, click **Setup > Build > Customize > Campaigns > Page Layouts** and then click **Edit**.
- Scroll down to the Campaign Details section and make sure that the fields are listed as follows:

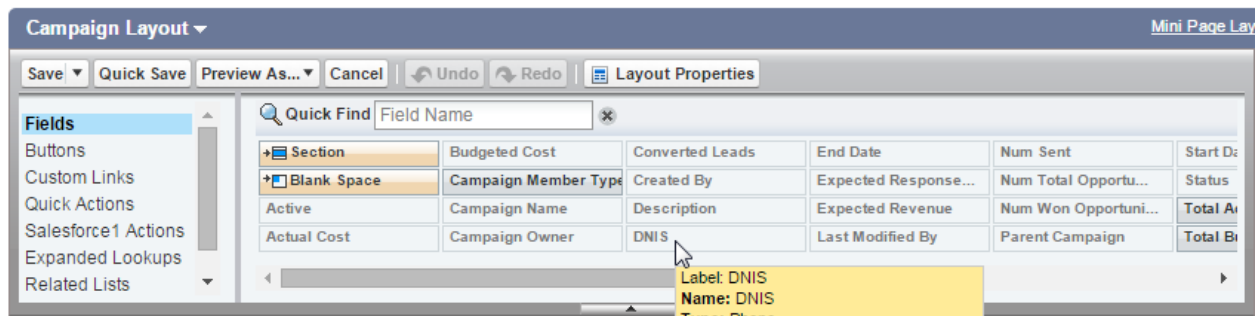
Campaign Detail

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. While still logged in as Administrator, click **Setup > Build > Customize > Leads > Page Layout** and click Edit.
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
2	Fax Opt Out	Lead Owner	Name	Primary	Title
3	Industry	Lead Source	No. of Employees	Product Interest	Website
4	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. While still logged in as Administrator, click **Setup > Build > Customize > Accounts > Page Layout** and then click E**dit**.
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	Sample User	Rating	Sample Rating
* Account Name	Sample Account Name	Phone	1-415-555-1212
Parent Account	Sample Account	Fax	1-415-555-1212
Account Number	Sample Account Number	Website	www.salesforce.com
Account Site	Sample Account Site	Ticker Symbol	Sample Ticker Symbol
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

1	Fax	Last Transfer Date	Mobile	Phone	SIC Code
2	Fax Opt Out	Lead Owner	Name	Primary	Title
3	Industry	Lead Source	No. of Employees	Product Interest	Website
4	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. While still logged in as Administrator, click **Setup > Build > Customize > Contacts > Page Layouts** and then click E**dit**.
2. Scroll down to the Contact Detail section and make sure that the **Phone, Mobile, and Home Phone** fields are listed.

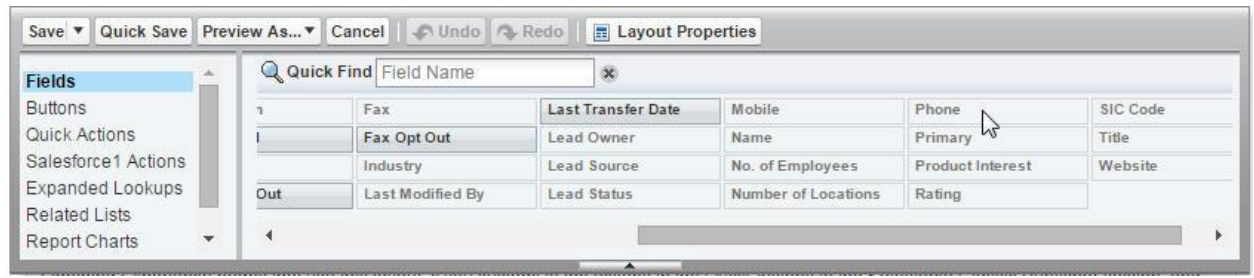
Contact Detail

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

Contact Information (Header visible on edit only)

Contact Owner	Sample User	Phone	1-415-555-1212
* Name	Sarah Sample	Home Phone	1-415-555-1212
Account Name	Sample Account	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	Sample Contact	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. While still logged in as Administrator, click **Setup > Build > Customize > Cases > Page Layout** and then click Edit.
2. Scroll down to the Case Detail section and make sure that the **Case Number** field is listed:

Case Detail

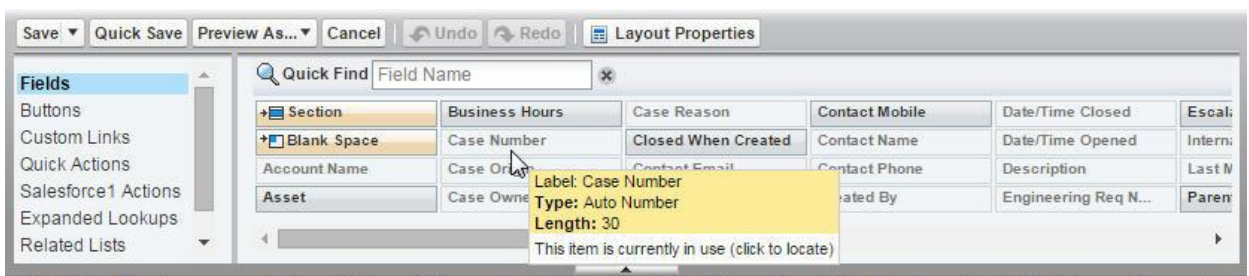
Standard Buttons: [Edit](#) [Delete](#) [Close Case](#) [Clone](#) [Sharing](#)

Custom Buttons:

Case Information (Header visible on edit only)

Case Owner	Sample User	* ● Status	Sample Status
Case Number	GEN-2004-001234	● Priority	Sample Priority
Contact Name	Sample Contact	🔒 Contact Phone	1-415-555-1212
Account Name	Sample Account	🔒 Contact Email	sarah.sample@company.com
Type	Sample Type	* ● Case Origin	Sample Case Origin
Case Reason	Sample Case Reason		

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

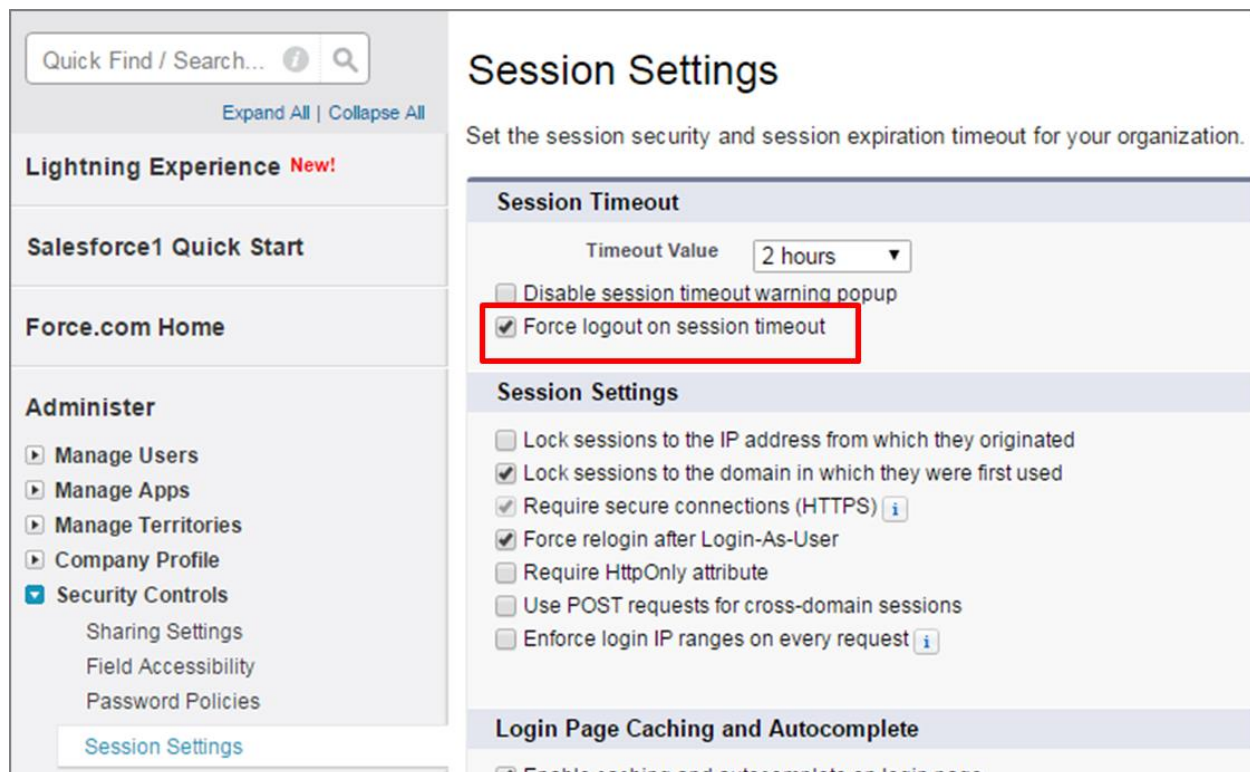
Symptom:

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. Click **Setup > Administer > Security Controls > Session Settings**.
3. Select the **Force logout on session timeout** check box.



Display Issues

This page is intentionally blank.

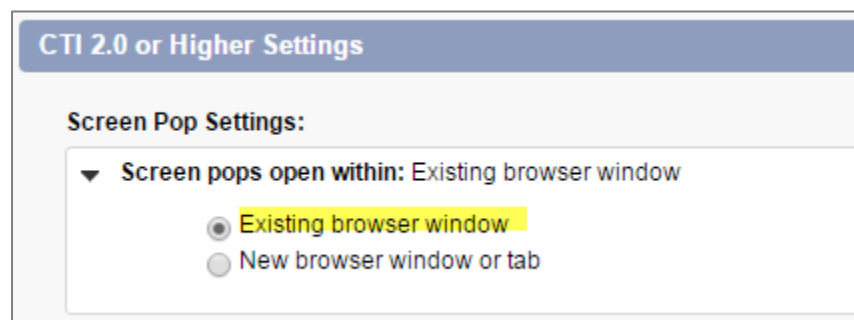
Disable Screen Pop-up in New Window or Tab

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. Click **Setup > Build > Customize > Call Center > Softphone Layouts** and then click Edit.
3. In the Softphone layout, under Screen Pop Settings, select **Existing browser window**.

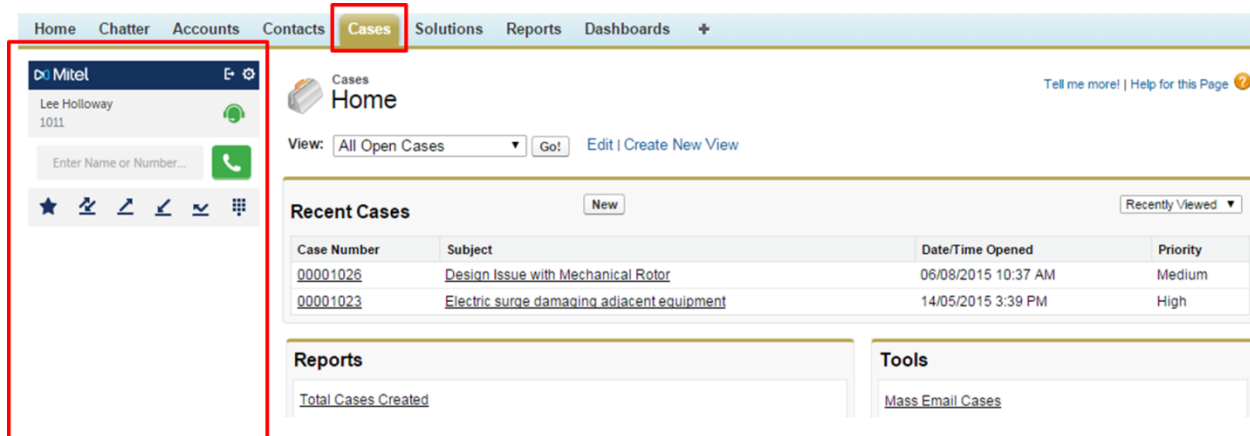


Note: Opening MiVoice Integration for Salesforce in multiple browser tabs in Classic Mode does not consume multiple user licenses; however, this is not recommended as it can result in unpredictable application behavior, (missing or duplicate contact updates, for example). Opening MiVoice Integration 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

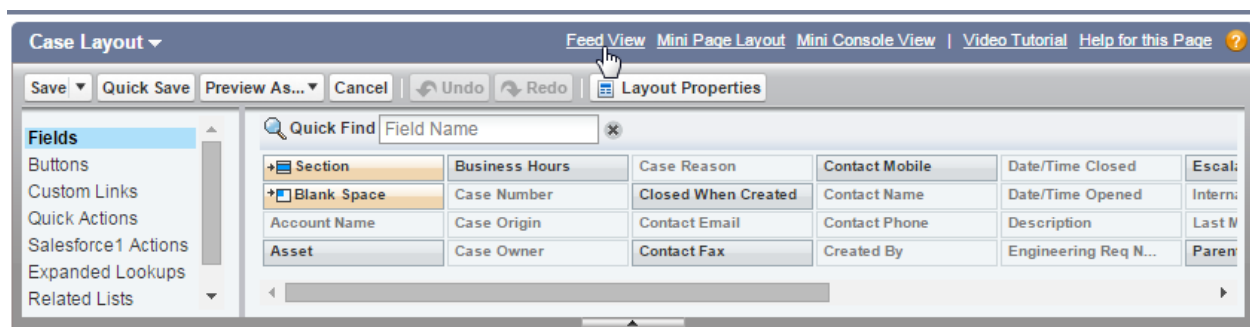
Symptom:

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



Corrective Action:

1. Log in as Administrator.
2. Click **Setup > Build > Customize > Cases > Page Layouts** and then click Edit.
3. In the Case Layout section, click Feed View.



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

Other Tools and Components

Custom Components *i*

Action	Name	Height (Pixels)
+ Add a Visualforce page		

Choose Placement *i*

Left Column

--None--

Up
Down
Move

Hidden

Files

Move

Right Column

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

Up
Down

Hide Sidebar *i* ☐

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. Click **Setup > Customize > Campaigns > Fields**.
3. Scroll down to **Campaign Custom Fields and Relationships** and then click **New**.

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

Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to display a map.

Number: Allows users to enter any number. Leading zeros are removed.

Percent: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign.

Phone: Allows users to enter any phone number. Automatically formats it as a phone number.

Picklist: Allows users to select a value from a list you define.

Multi-Picklist: Allows users to select multiple values from a list you define.

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

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label: ⓘ

Field Name: ⓘ

Description:

Help Text: ⓘ

Required: ☐ Always require a value in this field in order to save a record

Default Value: [Show Formula Editor](#)

Use formula syntax: e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

Previous Next Cancel

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

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