MiVoice Integration for Salesforce

ADMINISTRATION GUIDE (REVISED)

RELEASE 2.5 SP1

MAY 2022

NOTICE

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MiVoice Integration for Salesforce
Administration Guide (Revised)
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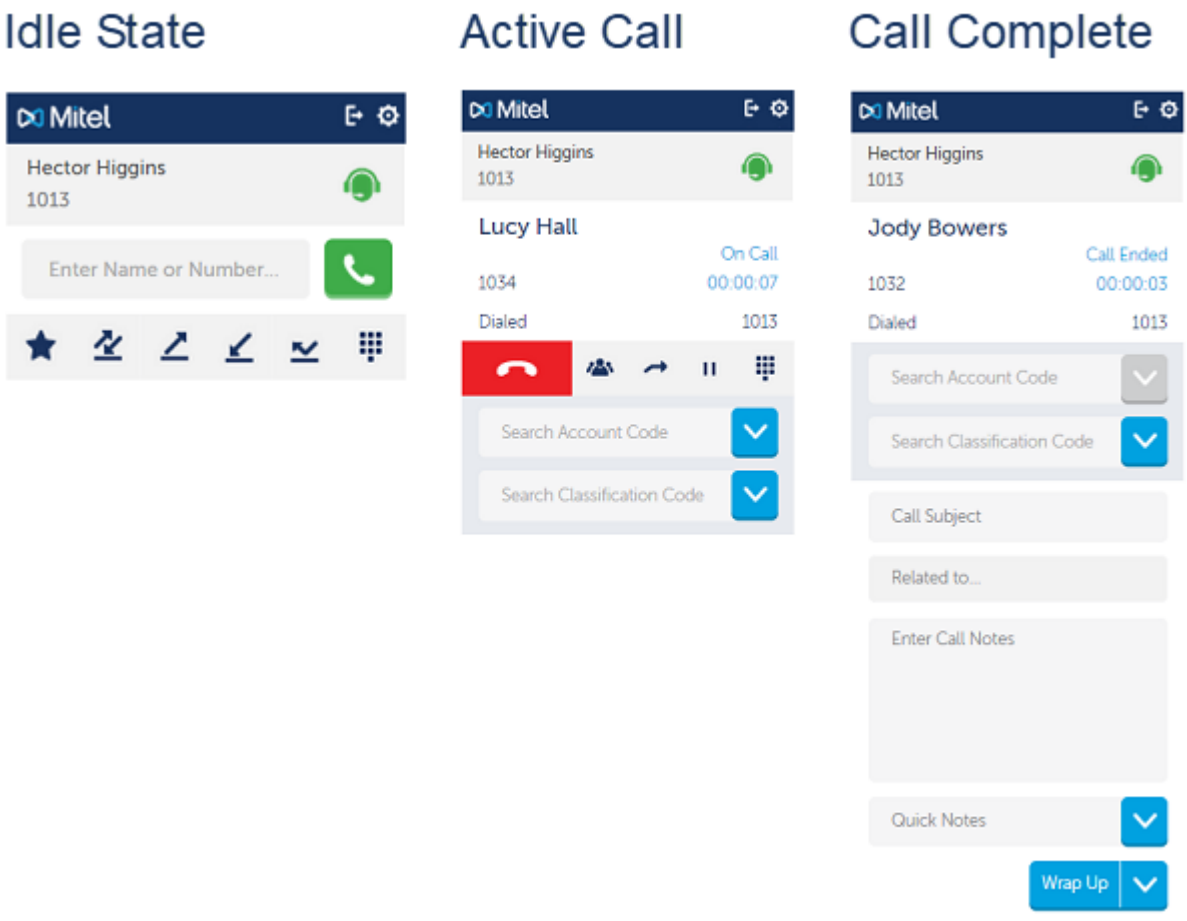
About MiVoice Integration for Salesforce

Mitel MiVoice Integration for Salesforce provides a rich set of computer telephony and other user productivity features for browser based users of MiVoice Business and the Salesforce Customer Relationship Management (CRM) solution. MiVoice features are fully embedded and integrated within the Salesforce contact window (examples shown below) when using an Internet browser and include:

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

This document is intended to help system administrators with the installation, configuration, and upgrade of the MiVoice Integration for Salesforce. The *MiVoice Integration for Salesforce User Guide* describes how to use the MiVoice client in the Salesforce environment and should be provided to users.



NEW FOR MIVOICE INTEGRATION FOR SALESFORCE 2.5 SP1+

MiVoice Integration for Salesforce 2.5 SP1+ is a 64-bit application that is recommended with MSL 11.0.90.0 that syncs blade from software download center. This release has a security fix for vulnerability related to X-Frame Options. So, it must be used with Mitel Open Integration Gateway (OIG) 4.2 SP1 and above versions.

OIG Administrator needs to follow proper upgrade procedures as mentioned in *Open Integration Gateway Installation and Maintenance Guide* available at the Mitel Document center.

Support for MiVoice Integration for Salesforce 2.5 SP1 requires the following:

- MiVoice Integration for Salesforce R2.5 SP1+
- Open Integration Gateway (OIG) R4.2.60.0+
- MiVoice Business (MiVB) R9.2+

MIVOICE INTEGRATION FOR SALESFORCE 2.5+

MiVoice Integration for Salesforce 2.5+ is a 64-bit application that is recommended with MSL 11.0.84.0 that syncs blade from software download center.

Support for MiVoice Integration for Salesforce 2.5 requires the following:

- MiVoice Integration for Salesforce R2.5+
- Open Integration Gateway (OIG) R4.2.57.0+
- MiVoice Business (MiVB) R9.2+

MIVOICE INTEGRATION FOR SALESFORCE 2.4+

MiVoice Integration for Salesforce 2.4+ is a 64-bit application that is supported by MSL 11 that syncs blade from software download center. So, it must be used with Mitel Open Integration Gateway (OIG) 4.1 SP4, and Mitel Standard Linux 11. OIG Administrator needs to follow proper upgrade procedures as mentioned in *Open Integration Gateway Installation and Maintenance Guide* available at the Mitel Document center. This does not impact Salesforce users.

Support for MiVoice Integration for Salesforce 2.4 requires the following:

- MiVoice Integration for Salesforce R2.4+
- Open Integration Gateway (OIG) R4.1.75.0+
- MiVoice Business (MiVB) R9.1+

When upgrading from Mitel OIG Release 4.x to Release 4.1 SP4 and MiVI-S 2.x to 2.4:

1. Login to the OIG server as administrator
2. In Blades Panel, uninstall or remove the installed MiVoice Integration for Salesforce blade.

3. In Blades panel, install the Remote Fresh Install MSL 11 blade using Blades > Install. The recommended version would be 11.0.64.0

4. Reboot the OIG

5. In Blades Panel, it might take a while to get the blades synced from Mitel Software Download Center (swdlgw.mitel.com). Once available, install Open Integration Gateway 4.1 SP4 (4.1.75.0)

6. Install MiVoice Integration for Salesforce blade 2.4.3.0

7. If localization languages files are needed for MiVoice Integration for Salesforce, these localization languages need to be re-entered into OIG 4.1 SP4 for the languages in Salesforce to work.

Note: OIG 4.1.75.0 is a 64-bit solution that is supported by MSL 11 only. Please refer to *Mitel OIG Engineering Guidelines* of OIG Release 4.1 SP4.

MIVOICE INTEGRATION FOR SALESFORCE 2.3+

MiVoice Integration for Salesforce 2.3+ has added support for MiCollab ACD SIP Softphone as well. This support does not extend to other available MiVoice Business SIP Phones. To know more about MiCollab ACD SIP Softphone, refer to *MiCollab ACD SIP Softphone Agents Integration Guide* available at the Mitel Document center.

Refer to the Device Support section for SIP Endpoint behaviour summary.

Notes: Support for MiCollab ACD SIP Softphone requires the following:

- MiVoice Integration for Salesforce R2.3.1.0+
- Open Integration Gateway (OIG) R4.1.38.0+
- MiVoice Business (MiVB) R9.0.1.22+

MIVOICE INTEGRATION FOR SALESFORCE 2.2+

MiVoice Integration for Salesforce 2.2+ has added support for Salesforce Lightning version. To support Lightning mode for users, refer to the “Lightning Experience” section in the *Installation and Configuration of MiVoice Integration for Salesforce v2.2* guide.

Support for MiVoice Integration for Salesforce requires the following:

- MiVoice Integration for Salesforce R2.2.8.0+
- Open Integration Gateway (OIG) R4.1.12.0+
- MiVoice Business (MiVB) R8.0.3.29+ or R9.0.0.184+

MIVOICE INTEGRATION FOR SALESFORCE 2.1+

- MiVoice Integration for Salesforce 2.1+ is a 64-bit application, so it must be used with Mitel Open Integration Gateway (OIG) 4.0+, and Mitel Standard Linux 10.5.15+.
- When using Salesforce Classic or Lightning mode, opening an additional web browser tab no longer consumes an additional Salesforce user license for that user.

- Using multiple web browser tabs in Salesforce Classic mode produces a different end user experience compared to using one tab; two examples of different UI behavior are screen pop on incoming call and displayed call status when tab opened after call is ringing or answered. All needed tabs should be opened at same time. Users wanting multiple records tab should opt to upgrade to Lightning mode.
- Supports the new Mitel 6900 MiNET Phone series, when used with MiVoice Business 8.0+.

When upgrading from Mitel OIG Release 3.0 to Release 4.x:

1. Remove the MiVoice Integration for Salesforce blade in OIG 3.0 before upgrading to OIG 4.1.
2. In OIG 4.1, install the new MiVoice Integration for Salesforce blade (Release 2.2.8.0).

Note: OIG 4.0 is a 64-bit solution that uses a 64-bit Salesforce blade. OIG 3.0 is a 32-bit solution that uses a 32-bit Salesforce blade.

Installation and Configuration

Install and configure the Mitel MiVoice Integration for Salesforce by completing the following procedures. The prerequisites and each procedure must be completed for the integration to be successful.

Note: The Salesforce solution must use HTTPS for all web services communication.

PREREQUISITES

To simplify installing and configuring the MiVoice Integration for Salesforce, ensure the following prerequisites are met:

- Mitel MiVoice Business is configured and functional
- The IP address of the MiVoice Business server is available
- Open Integration Gateway (OIG) is installed and functional, and the MiContact Center Business has been added to the OIG as a Network Element. See the OIG *Installation and Maintenance Guide* for instructions.
- Telephone sets are programmed and functional for each user,
- The mapping of each Salesforce user phone number (DN) to a specific MiVoice Business Controller IP address is defined.
- To prepare Salesforce users:
  - If using Windows Authentication, then the e-mail address configured for the user in Salesforce must match the e-mail address that is configured for the Employee in MiContact Center Your Site Explorer.
  - If the user's user name and password are defined and managed in the MiContact Center Business product, this e-mail address matching is not necessary.
- Licensing is in place for:
  - Mitel OIG server (OIG or MiVoice Integrations Base Package, virtual or physical) is functional and licensed for MiVoice Integration for Salesforce.
  - MiVoice Integrations require a MiVoice Integration license using one of the deployment options. Refer to the Mitel OIG Installation & Maintenance Guide for details.
  - If using the MiContact Center Business, additional licensing is in place for Advanced Call Control, MiContact Center, and MiVoice Integration for Salesforce.
  - Salesforce licenses must be purchased directly from Salesforce.

    Note: If there are problems with any of the licenses, the errors will be displayed to users.
- The FQDN (required for CA certificates) or IP address of the OIG server is available
- Mitel MiVoice Integration for Salesforce **local password**, configured in the OIG, is available
- A certificate strategy for the Mitel OIG server is in place. If remote users plan to use MiVoice Integration for Salesforce, then a MiVoice Border Gateway with web proxy service must be used to proxy remote requests to the Mitel OIG server within the enterprise, and the MiVoice Border Gateway server must also have a CA certificate.

  Note: Installing a CA certificate on the Mitel OIG server is required.

- A MiVoice Border Gateway web proxy server (MBG 9.2 or later) is required to enable remote Salesforce users (outside the Enterprise Network) access to the MiVoice Integration for Salesforce web application. The MBG web proxy allows a web browser with Salesforce and MiVoice Integration to access the Mitel OIG server within the Enterprise. See the MiVoice Border Gateway Installation & Maintenance Guide for instructions on how to configure the web proxy feature for MiVoice Integration.
- MBG (11.3 SP1) has an option 'Strict X-Frame options' under the Domain List on the Remote Proxy Configuration Page, it should be disabled.

  Note: The WAN-side FQDN for the Mitel OIG server used for the remote Mitel OIG application must match the LAN-side FQDN for the Mitel OIG server within the enterprise network when configuring the Mitel MBG web proxy.

INSTALL MIVOICE INTEGRATION FOR SALESFORCE

1. Log in to **Mitel Standard Linux** (MSL) by logging in to OIG Server.
2. Click on **Mitel OIG** to get to the Mitel OIG console.
3. Under **ServiceLink** (left column), click Blades.
4. Install the **MiVoice Integration for Salesforce** blade.

NOTE: Upgrading to MiVoice Integration of Salesforce 2.4+ requires proper upgrade process to follow. Please refer to *Open Integration Gateway Installation and Maintenance Guide* for OIG release 4.1 SP4.

DOWNLOAD THE MIVOICE INTEGRATION FOR SALESFORCE

1. Open the Salesforce App Exchange website:
   https://appexchange.salesforce.com
2. Log in using your Admin credentials:

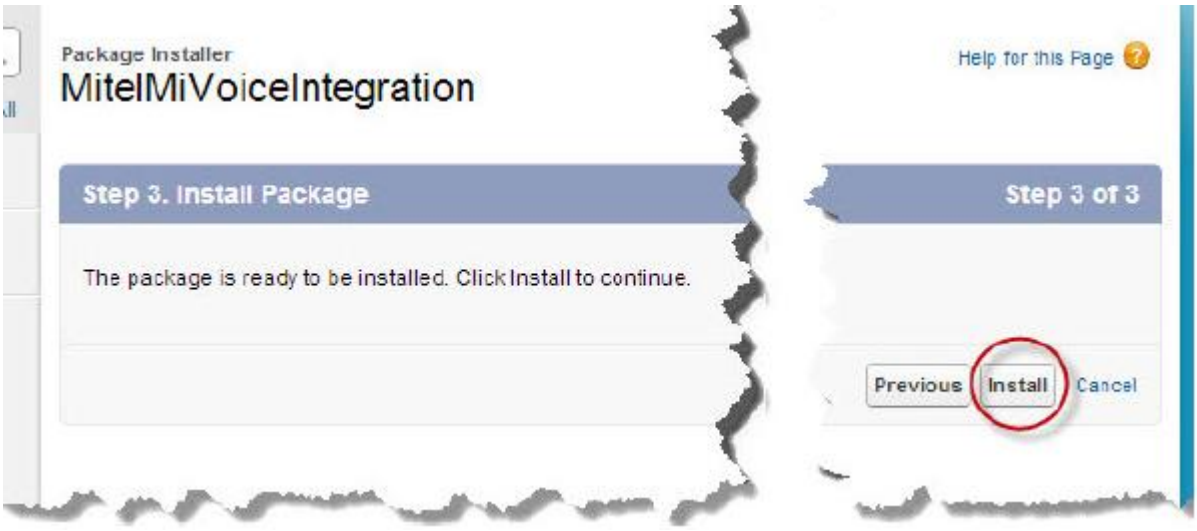
   Note: **https://appexchange.salesforce.com/gettingStarted** provides help with using the Salesforce App Exchange website.
3. Search for **Mitel MiVoice Integration for Salesforce** on the Salesforce App Exchange.
4. Mouse-over the application in the results list and click **More** from the list that appears.
   A page opens with details about the application.
5. Click **Get It Now**.
   The page refreshes with a choice of installing in Production or in a Sandbox.
6. Select the **Sandbox** or **Production** install.
   Enter your administrator credentials and acknowledge the user terms.

   Note: Mitel recommends testing your MiVoice Integration for Salesforce in a sandbox environment before deploying to production. Sandbox installations may require additional information related to setting up a test environment.

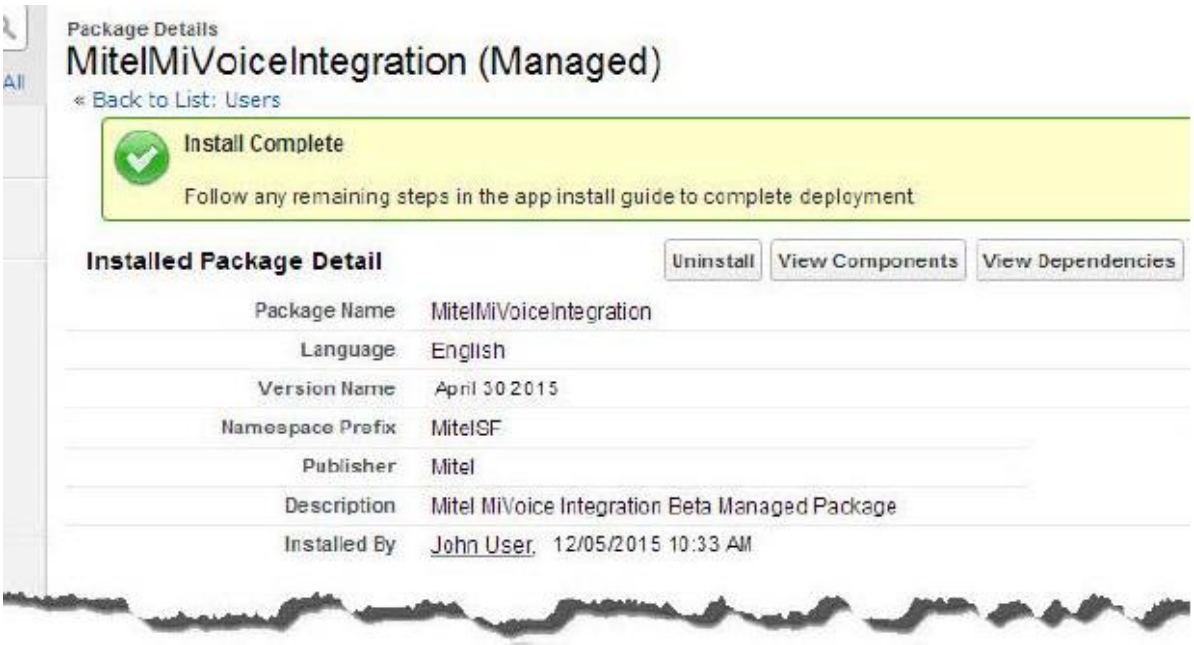
   Click **Continue** to download the MiVoice Integration for Salesforce managed package.
8. Acknowledge each of the messages that are presented.
   When the series of prompts are completed the Mitel MiVoice Integration for Salesforce package is ready to be installed.

RUN THE MIVOICE INTEGRATION FOR SALESFORCE PACKAGE INSTALLER

1. Approve the Package API Access.
   For typical installations, the access permissions can be left at their default values.
2. Select the security level.
   The recommendation selection is **Grant access to all users**.
3. Click **Install** to install the packaged API.



4. Salesforce indicates that the MiVoice package installation is complete.



CONFIGURE CALL CENTERS

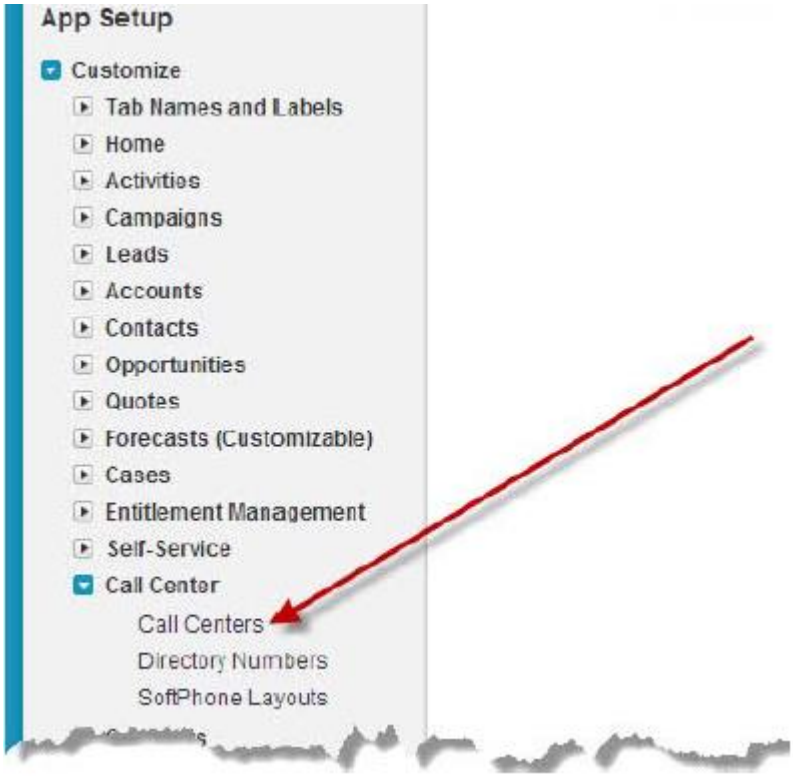
Note:

- This section describes how to configure Call Centers for MiVoice Integration for Salesforce Classic v2.1. For information specific to installing and configuring MiVoice for Salesforce Lightning Experience v2.2.
- With MVSF v2.3 MiCollab ACD Softphone support is introduced. Upgrading MVSF blade to 2.3 automatically upgrades the plug-in and no additional steps are required.

After the installation is complete, you must customize a Salesforce Call Center for each MiVoice Business controller that will be used and add Salesforce users to each Call Center. Each Salesforce user must have a custom user profile that allows access to the MiVoice Business objects.

Note: There is only one Salesforce Call Center for each MiVoice Business instance.

1. Log in to Salesforce with your administrator credentials.
2. Click **Setup** in the Salesforce banner, if your default view is not the administration setup view.
   A menu of items appears on the left side of the screen.
3. Do one of the following:
   - **Classic:** Select **App Setup > Customize > Call Center**
     Note: App Setup is set to Build in the Salesforce sandbox environment.
   - **Lightning:** Select **Feature Settings > Service > Call Center**.
4. Click **Call Centers**.
   The main part of the screen is refreshed, displaying a list of configured Call Centers.



5. Click **Edit** for the Call Center you want to configure.
   The screen is refreshed with the Call Center details.

Figure 1: Enter the Call Center configuration details on the Call Center Edit **screen. See the table**

6. .
   These settings apply to all users on this Call Center.
7. Enter all of the required values and any additional desired values. Required fields are marked with red bars.
8. Click **Save**.
   The screen refreshes to view mode for the call center details.
9. Edit any additional Call Centers (one call center for each MiVoice Business system), as required.

Figure 1: Call Center Edit Screen

General Information

- **InternalNameAAA -** Enter a unique internal name. The name can be up to 40 alphanumeric characters and must start with an alphabetic character.
- **Display Name -** Enter a unique display name. Salesforce agents may use this name to identify the server they are using.
- **CTI Adapter URL -** Replace the displayed address with the actual FQDN of your OIG server. The FQDN is required for working with CA certificates. Example: https://oig161.mitel.com/mitel/oig/OIGSalesForce/ **NOTE:** The CTI Adapter URL **MUST** end with a /
- **Use CTI API** - Leave this at the default value (true)

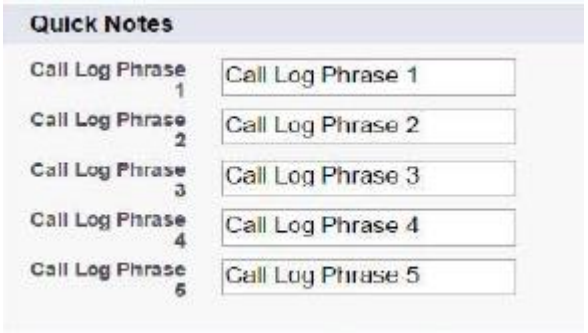
Softphone Height - NO LONGER USED

Dialing Options

- **Outside Prefix** - This setting is NO LONGER USED - provided for S/W backward compatibility.

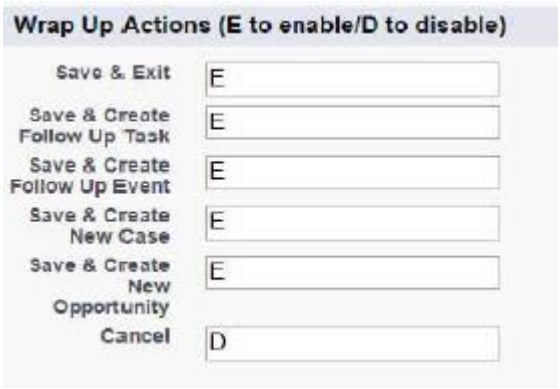
To configure Outside Prefix for Mitel Integration for Salesforce, configure the **Outside Prefix** field provided using **Custom** setup with the **Network Elements** tab in the OIG Server.

For more details, refer to the *OIG Installation and Maintenance Guide* and *OIG Engineering Guidelines*.



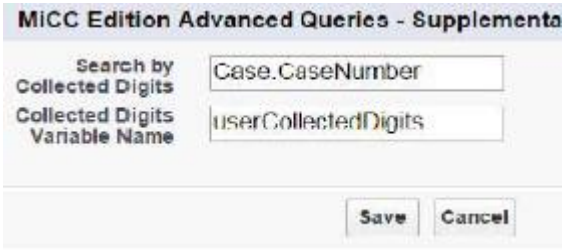
Quick Notes

- Each entry is a phrase that agents can add to their call logs without typing. Enter the most commonly used call notes.
- Blank entries are not used.



Wrap Up Actions

- Choose a maximum of five wrap up actions.
- Setting **Cancel** to **Disable (D)** will force users to enter a wrap up action.
- If no wrap up action is specified, ending a call will automatically save any call logs and return the agent's client to the idle state.
- Entering an **E** for any wrap up action forces the agent to choose a wrap up action for each call.
- Only the enabled wrap-up actions will be listed for the agents on this call center.



MiCC Edition Advanced Queries

This configuration item is used only when the system is integrated with Mitel MiContact Center (MiCC). Supplemental licensing is required.

- **Search by Collected Digits** - Enter the *object* to search on for directing to the correct queue. To configure Advanced Queries, indicate the *object* field, where *object* can be **Campaign**, **Contact**, **Lead**, **Account**, **Opportunity**, or **Case**. Field can be a standard Salesforce field or a custom field. The field type must be **Text**, **Phone**, or **Number**.
- **Collected Digits Variable Name** - MiCC server provides collected digits for every call. If there are multiple MiCC Workflows, they must all use the same Collected Digits Variable Name. Default: **userCollectedDigits**.

CONFIGURE THE MICC EDITION ADVANCED QUERIES FIELD

In setting up the search for collected digits, you must configure what kind of object the system will match on for displaying pop-up windows.

Table 1: Configuring Advanced Queries Field

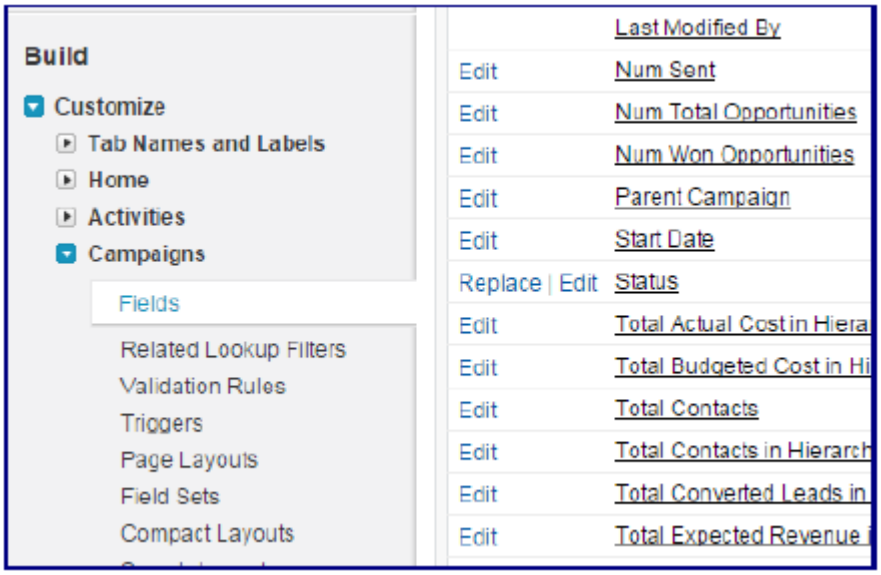
	FIELD NAMES
Campaign	Campaign Name
Contact	Assistant (AssistantName) Asst. Phone (AssistantPhone) Data.com Key (Jigsaw) Department (Department) Description (Description) Mobile (MobilePhone) Phone (Phone) Other Phone (OtherPhone) Title (Title)

Lead	Company (Company) Company D-U-N-S Number (CompanyDunsNumber) Data.com Key (Jigsaw) Mobile (MobilePhone) Phone (Phone) Title (Title)
Account	Account Number (AccountNumber) Account Site (Site) Data.com Key (Jigsaw) Company D-U-N-S Number (CompanyDunsNumber) NAICS Code (NaicsCode) NAICS Description (NaicsDesc) Phone (Phone) SIC Code (Sic) SIC Description (SicDesc) Trade Style (Tradestyle) Year Started (YearStarted)
Opportunity	Next Step (NextStep) Opportunity Name (Name)
Case	Case Number (CaseNumber) Contact Fax (ContactFax) Contact Mobile (ContactMobile) Contact Phone (ContactPhone) Internal Comments (Comments) Web Company (SuppliedCompany) Web Name (SuppliedName) Web Phone (SuppliedPhone)

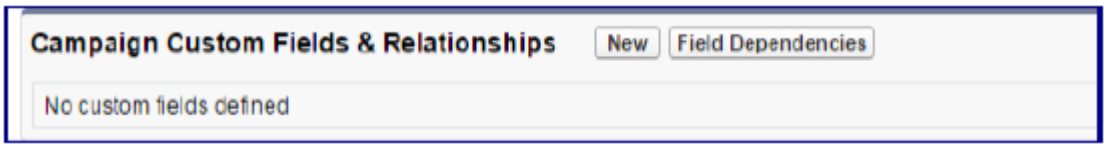
Add a Custom Field for DNIS Search

Use the following procedure to add a custom field for collected digits.

1. On the Salesforce **Setup** page, do one of the following:
   - **Classic:**
     a. Navigate to **Build > Customize > Campaigns > Fields**, as shown in the following graphic.



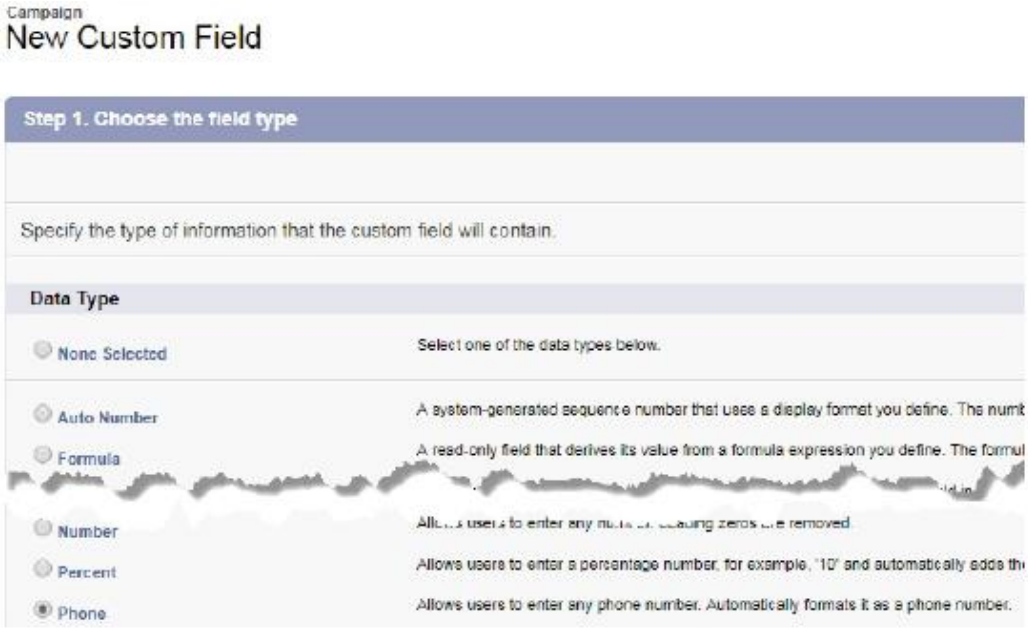
b. Scroll to **Campaign Custom Fields and Relationships**, and click **New**.



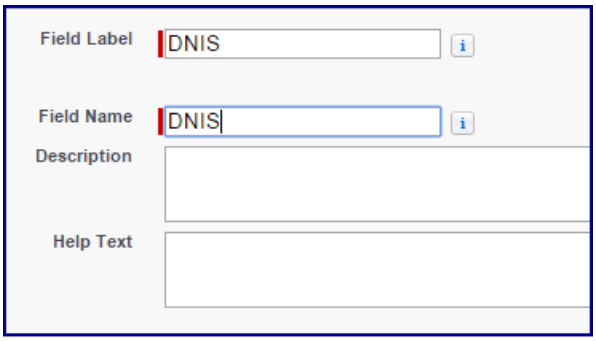
- **Lightning:** Navigate to **Object Manager > Campaign > Fields & Relationships**, and then click **New**.

2. In the wizard, do the following:

a. Select **Phone** as the field type, and then click **Next**.



b. Enter the details; enter *DNIS* in the **Field Label** and **Field Name** fields, and then click **Next**.

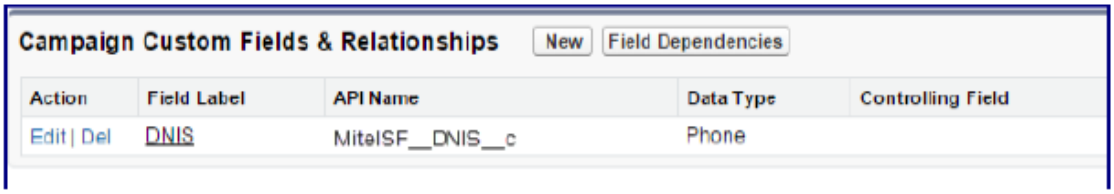


c. Establish field-level security; leave all fields at their default values (no changes), and then click **Next**.

d. Add to page layouts; leave all fields at their default values (no changes), and then click **Next**.

e. To create another custom field, click **Save & New**, and then repeat this procedure using the wizard.

f. To save and exit the wizard, click **Save**.
The new custom field is displayed under **Campaign Custom Fields & Relationships**.

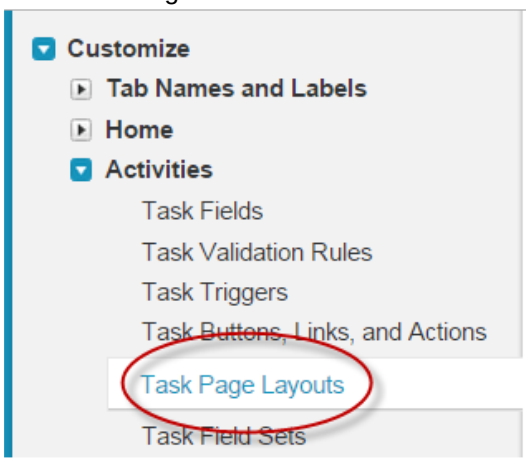


LOGGING CALL DURATION

You can configure Salesforce to log the duration of the calls.

To enable logging call duration:

1. On the Salesforce **Setup** page, do one of the following:
   - **Classic:** Navigate to **Customize > Activities > Task Page Layout**.

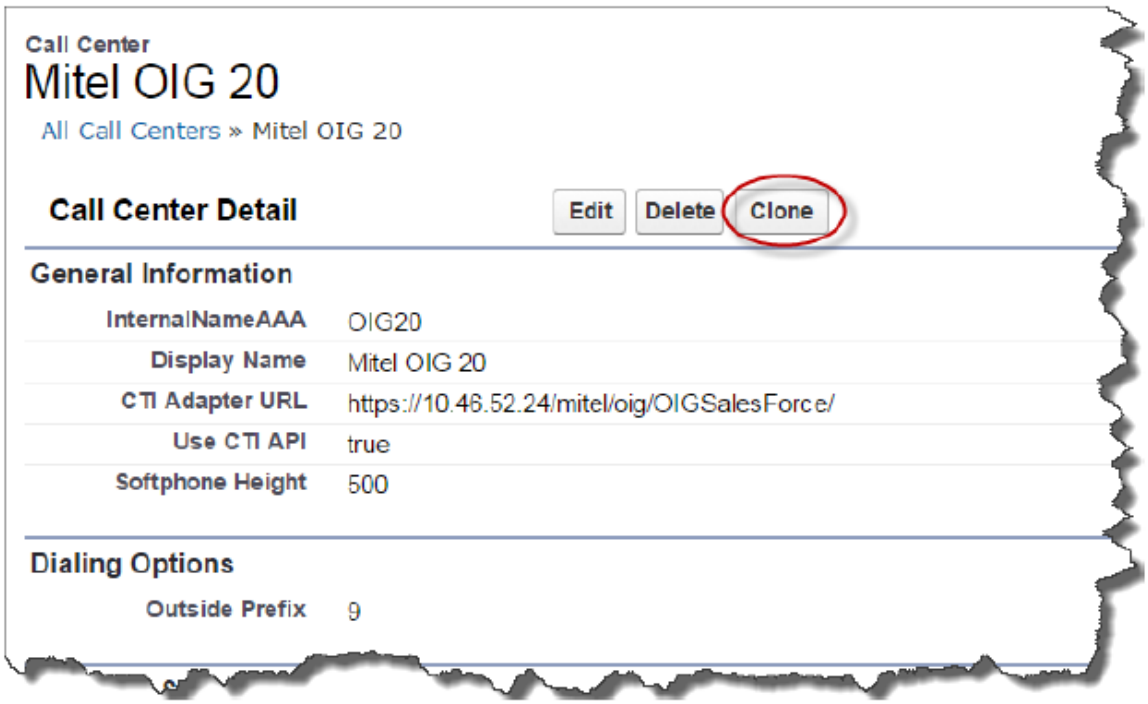


   - **Lightning:** Navigate to **Object Manager > Task > Page Layouts**.
2. In the Task Layout, click **Edit**.
3. Drag and drop **Call Duration**, **ANI**, and **DNIS** to the **Task Detail** below.

CREATE A NEW CALL CENTER

A new MiVoice Business controller can be added quickly by cloning a server that is already configured in Salesforce.

1. On the Salesforce **Setup** page, do one of the following:
   - **Classic:** Select **App Setup > Customize > Call Center > Call Centers**.
   - **Lightning:** Select **Feature Settings > Service > Call Center > Call Centers**.
2. Click the name of an existing MiVoice Business Call Center.
   The screen refreshes and displays all the configuration details of the Call Center.

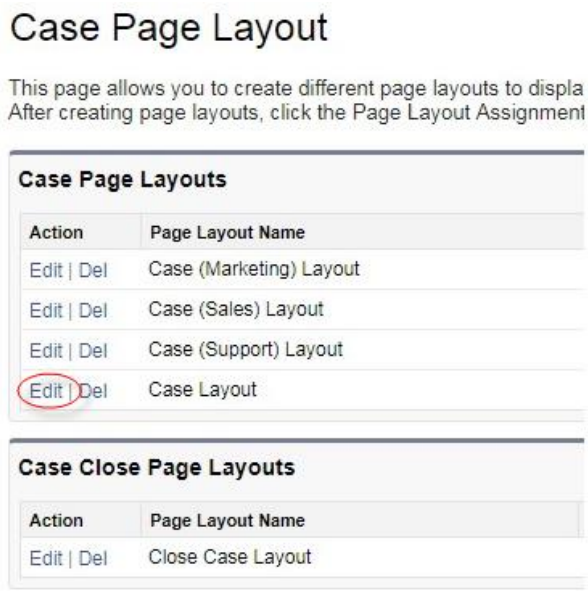


3. Click **Clone**.
   A call server edit screen opens with the same details as the Call Center that was cloned.
4. Enter a new internal name.
   You must enter a new internal name before the Call Center can be saved.
5. Edit any other Call Center details as desired.
6. Click **Save**.

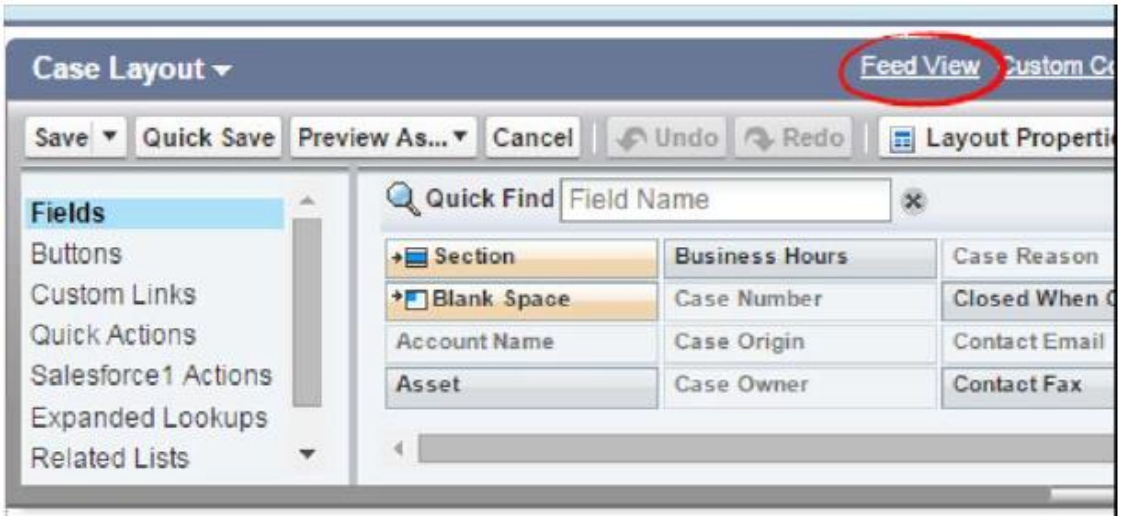
ENABLE THE SIDEBAR FOR CASES

1. On the Salesforce **Setup** page, do one of the following:
   - **Classic:** Navigate to **Customize > Cases > Page Layouts**.
   - **Lightning:** Navigate to **Object Manager > Case > Page Layouts**.

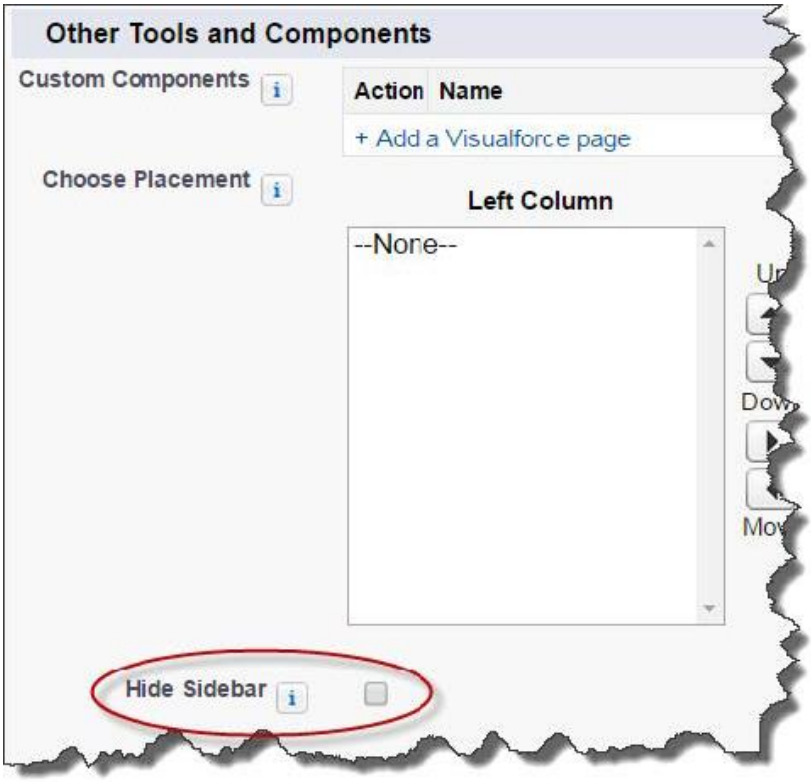
2. Click **Edit** next to the case page layout for which you want to enable the sidebar.



3. Click **Feed View**.



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



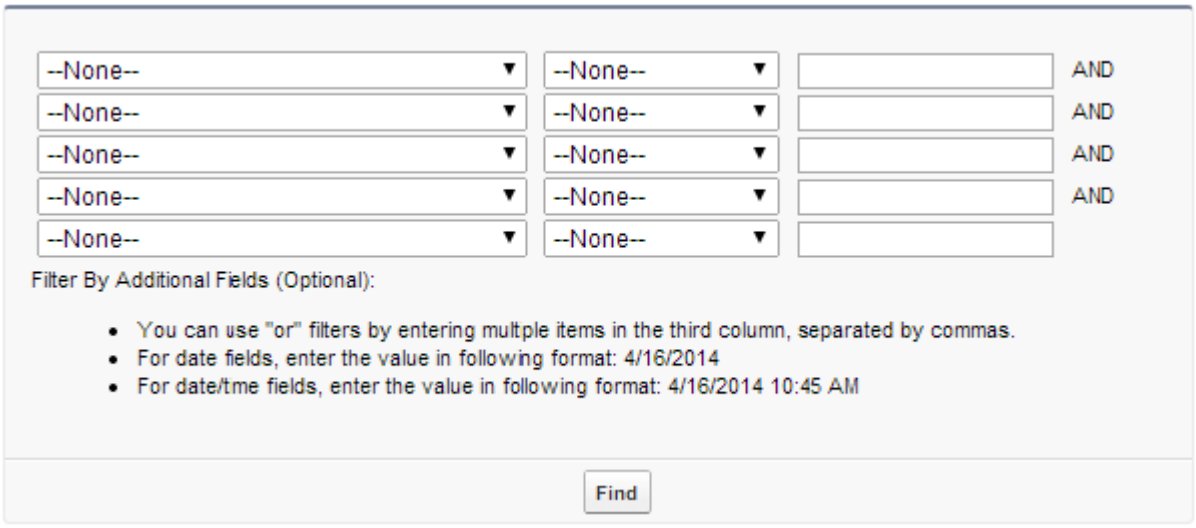
ADD USERS TO A CALL CENTER

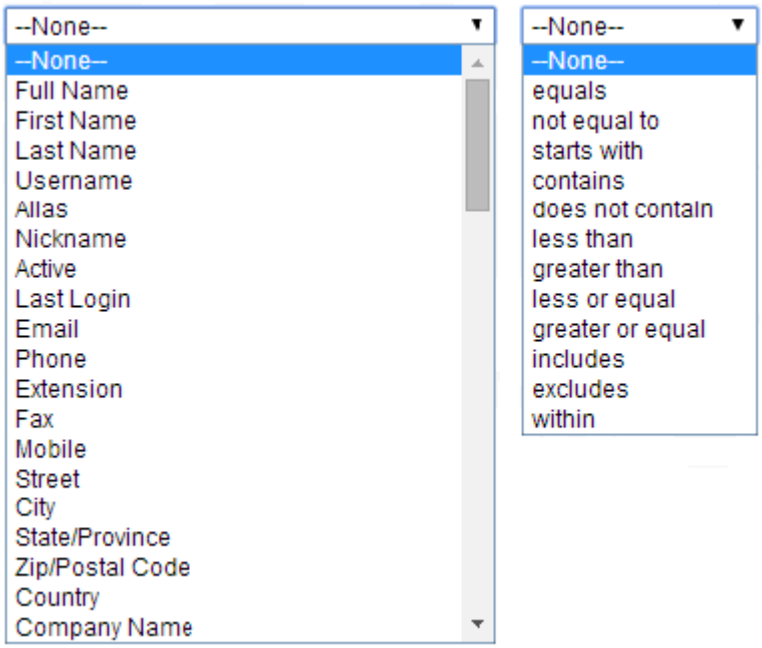
Salesforce users must be added to a Call Center to use the MiVoice Integration for Salesforce. Users must also be configured on the MiVoice Business system that the Call Center is pointed to. Before adding users, make sure that you have a mapping of Salesforce users to Call Centers.

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 Salesfoce in either Classic mode or Lightning Experience mode.

1. If you are already in the view mode of the Call Center, go to step Click .
2. Navigate to the list of Call Center as you did in steps Log in to Salesforce to Click of Configure Call Centers.
3. Click the name of the Call Center.
   The screen refreshes to display all of the configuration details of the Call Center.
4. Click **Manage Call Center Users**.
   The screen refreshes to display the list of users already added to the Call Center.

   Click **Add more users**.
   The screen refreshes with a dialog box that has drop-down criteria for the search operation.





6. Enter the criteria and values to search for.
   The users must already be configured in Salesforce. Users already added to the Call Center do not appear in the list.
7. Select the users you want to add to the Call Center, and then click **Add to Call Center**.
8. Perform new searches and select users until all the users have been added to the Call Center.
9. Confirm that each new user added to the Call Center has the correct phone number and profile type specified in their Salesforce user profile.

Notes:

- Each user must have a phone number entry, which is the MiVoice Business telephone number assigned to the user in either of the phone number fields, **Phone** or **Extension**. MiVoice Integration for Salesforce works only on the prime line of the user.

- When a user is assigned the MiCollab ACD SIP Softphone number, Salesforce administrator needs to provide the login instructions mentioned in Send Instructions to Each New User, to the respective user.

CREATE A CUSTOM SALESFORCE USER PROFILE

Salesforce user profiles define the privileges and features that Salesforce users can access and use. Salesforce users for the MiVoice Integration must have a custom Salesforce user profile.

Salesforce documentation provides instructions for the following steps:

1. Copy an existing Salesforce profile to create a new custom profile (Custom- MiVoice user, for example).
2. Edit the custom profile to allow access to the following MiVoice object: OIGUserFavorites
3. Save the custom Salesforce user profile
4. Update the Salesforce users to use the custom profile
5. To allow access for the MiVoice Integration for Salesforce apex classes, ensure that MitelSF apex classes are enabled for the profile. This can be done by following below mentioned steps:
   1. From **Setup**, enter Profiles in the **Quick Find** box, then select **Profiles**.
   2. Select the profile.
   3. In the **Enabled Apex Class Access** section, click **Edit**.
   4. Select the **Apex classes** that you want to enable from the **Available Apex Classes** list and click **Add**, or select the Apex classes that you want to disable from the Enabled Apex Classes list and click **Remove**.

   Note: It is recommended to have all the available MitelSF apex classes enabled in profile to make full use of MiVoice integration for Salesforce.

   5. Click **Save**.

SEND INSTRUCTIONS TO EACH NEW USER

- Configuration Instructions
- Wrap-Up Instructions
- Login Instructions for MiCollab ACD SIP Softphone User
- Launch the MiVoice for Salesforce App
- “Dialing outgoing calls with prefix” on page 39

Configuration Instructions

Notify each user of the required settings for their MiVoice Integration for Salesforce UI and what the incoming call matching order should be. The matching settings are:

- **ANI Search** - This option matches Salesforce contact records on the caller telephone number. ANI stands for Automatic Number Identification.
  This option can be used both with General Business and MiContact Center licenses.

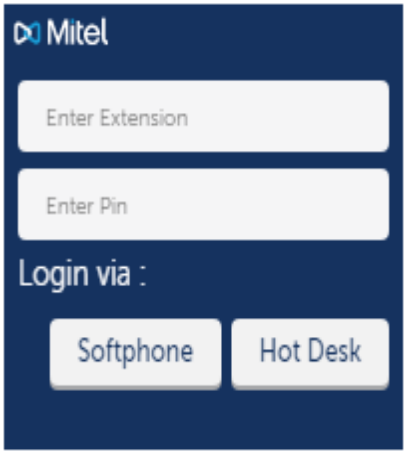
- **DNIS Search** - This option matches records on the Salesforce Campaign record. DNIS is the Dialed Number Identification Service.
  This option can be used both with General Business and MiContact Center licenses.
- **Collected Digits Search** - This option matches records on the custom data (Collected digits) coming from the MiContact Center IVR system. If the incoming custom data matches an existing record in the Salesforce database, the Case, Account, or Opportunity record, for example, is displayed.
  The default Salesforce record and field to search are defined in the Salesforce XML configuration file. The Collected Digits Search field type is one of “text”, “phone”, or “number”.
  Refer to the Salesforce documentation for more information.
  This option can be used only with MiContact Center Business licenses.
- **New Contact Pop-up**: Pop the New Contact window if caller is not saved as Contact in salesforce. This option is enabled by default. It is used differently in both the Salesforce mode as explained below:
  - Lightning Mode: When this option is enabled, user will get **New Contact** pop-up only upon answering the call. When this option is disabled user won’t get any new contact popup.
  - Classic Mode: When this option is enabled with Pop-up at ringing/Pop-up at Answered setting, user will get New Contact pop-up at ringing or answered respectively. When this option is disabled user won’t get new contact popup.

Wrap-Up Instructions

If you have changed the Wrap Up Actions from their defaults, it is recommended that you include instructions and/or training for the intended use of each of the Wrap Up options users will see.

Login Instructions for MiCollab ACD SIP Softphone User

The MiCollab ACD SIP Softphone user must select the **Softphone** button to login. When the **Softphone** button is clicked the user will be logged in, Mitel plug-in appears in Idle state if MiCollab ACD softphone is up and running. If not, the **Phone out of Service** message is displayed.



Note: The **Enter Extension** and **Enter Pin** fields are not relevant for a MiCollab ACD SIP Softphone user. These fields are only required for logging in Hot Desk Agents or Hot Desk Users.

Dialing outgoing calls with prefix

The users need to be aware to dial out and save contacts, prefixed with "+" so that the appropriate dialing prefixes gets added (depending on the OIG server configuration) for outgoing calls.

Please refer to section "Configure Mitel OIG For E.164 Dialing Support" in this document for details.

Device Support

All Mitel IP Devices are supported except the following:

- Mitel IP Consoles
- Attendant Consoles
- Mitel 500X, 520X, and 530X IP Phones
- IP trunks
- ONS Phones
- SIP Devices have limited support

SIP ENDPOINTS

With MiVB 9.0 SP1, MiVB has added enhancements to support the implementation of event packages in SIP Endpoints. For details, please refer to the Talk and Hold event packages, which are an instantiation of the SIP specific event notification framework (as defined in RFC 3265 by Roach, A.B., "Session Initiation Protocol (SIP)-Specific Event Notification", RFC 3265, Internet Engineering Task Force, June 2002. Available from http://www.ietf.org/). Hence, hereafter, the behaviour of Mitel plugin with MiVI-S for SIP Endpoints depend on the behavior of the SIP Endpoints defined by the packages implemented on the SIP Endpoint.

Please refer to SIP Device Support section of Mitel OIG Call Control Dev Guide for details on some expected behaviour.

Further, as we are aware MiCollab provides with SIP Softphones, below is a summary of the MiVI-S plugin behaviour with a MiCollab SIP Softphone as Salesforce User:

- UC Endpoint – Call Scenarios that are run using the Mitel plugin from the softphone are supported. However, call scenarios run directly from Softphone has limited supported, for example, there would not be pop-ups or any UI changes for a conference or transfer.

  Note: Screen-pops to Salesforce only occur for calls ringing on the User's prime line. If the User is a non-ACD agent with additional line keys, and the user receives a second call while they are already on the phone on their prime line, the new call will

ring in to one of the non-prime lines. The user can answer this new call, but it will not generate a new screen-pop within Salesforce.

- MiCollab ACD SIP Endpoint – This SIP Endpoint is supported with MiVI-S plugin. Please refer to Login Instructions for MiCollab ACD SIP Softphone section of this document for user instructions.

Salesforce Administrators need to assign endpoints to Salesforce Users considering those behaviour, while keeping the users informed of the SIP Endpoint behaviors.

Configure the User interface for a Different Language

The language of the MiVoice Integration for Salesforce is set based on the browser locale. Table 2 lists the supported languages.

Table 2: Supported Languages for UI Localization

Chinese (Simplified)	Chinese (Traditional)
Danish	Dutch
English	Finnish
French	German
Italian	Japanese
Korean	Norwegian
Portuguese	Russian
Spanish	Swedish
Thai	

Configure Mitel OIG for E.164 Dialing Support

In the Mitel OIG **Network Elements** tab, the **Custom** setup allows you to configure for E.164 telephone directories. Some national telephone bodies or telephone companies have implemented an Internet-based database for their numbering spaces. E.164 numbers may be used in the Domain Name System (DNS) of the Internet in which the second-level domain e164.arpa has been reserved for telephone number mapping (ENUM).

E.164 Support for Outgoing Calls

Long Distance Prefix, International Prefix and Local Area Codes are added to the Dialing Options to facilitate dialing outbound calls. Local Country Code, Long Distance Call Prefix and International Call Prefix under E.164 support will be used to match phone numbers in E.164 format.

For detailed instructions, see the *Mitel OIG Installation & Maintenance Guide* and *Engineering Guidelines*.

Upgrade

Upgrading to a new version of the MiVoice Integration for Salesforce does not require re-installation. When new versions are available, a Salesforce App Exchange wizard will guide you through upgrading your MiVoice Integration for Salesforce application. Follow the on-screen steps to complete the upgrade.

A new version of Mitel OIG server may be required to provide new features for MiVoice Integration for Salesforce; the Mitel OIG is part of the overall solution. For example, to get a new feature for MiVoice Integration for Salesforce, only an update of the Mitel OIG software may be required. Refer to the Software Release Notes for each new version of Mitel OIG to determine what is needed.

Note: To see the upgraded version of the application you may need to refresh your session by logging out and then logging back in to your Salesforce administrator account, or in some cases, closing and re-opening the browser before logging in again.

UPGRADING TO MIVOICE INTEGRATION FOR SALESFORCE RELEASE 2.5 SP1+

To upgrade to 2.5 SP1+, proper upgrade process and install instructions mentioned in “Upgrading from OIG 4.x to OIG 4.2 SP1+” section of the Mitel OIG Installation and Maintenance Guide for OIG release 4.2 SP1+ because MiVI-S 2.5 SP1+ is supported with OIG 4.2 SP1+, where the blades are synced from Mitel Software Download Center (swdlgw.mitel.com).

UPGRADING TO MIVOICE INTEGRATION FOR SALESFORCE RELEASE 2.4+

To upgrade to 2.4+, proper upgrade process and install instructions mentioned in “Upgrading from OIG 4.x to OIG 4.1 SP4+” section of the Mitel OIG Installation and Maintenance Guide for OIG release 4.1 SP4+ because MiVI-S 2.4+ is supported with MSL 11, where the blades are synced from Mitel Software Download Center (swdlgw.mitel.com).

UPGRADING TO MIVOICE INTEGRATION FOR SALESFORCE RELEASE 2.2

To upgrade to 2.2, upgrade the *MiVoice Integration For Salesforce* blade available in OIG Server. However, to complete the required configuration on Salesforce for Lightning Experience, refer to the **Error! Reference source not found.**.

It is recommended not to use screen pop to a new tab in Salesforce Classic View; use the **Screen pop Existing browser window** option instead.

Using the CTI option in Salesforce to screen pop to a new tab creates a second instance of the MiVoice Integration. This could lead to missing or duplicated entries in Salesforce, and a poor user experience. Instead, when training your agents to use the new MiVoice Integration for Salesforce, train the agents to use Salesforce in Console mode.

Console mode is available in the following Salesforce licenses:

- Enterprise, Performance, Unlimited, and Developer editions with Service Cloud.
- Performance and Developer editions with the Sales Cloud.
- Enterprise and Unlimited Editions with the Sales Cloud (extra cost).

Running in Console mode may require additional configuration in Salesforce to optimize the console for ACD agent use. A sample console layout is available through Salesforce for testing.

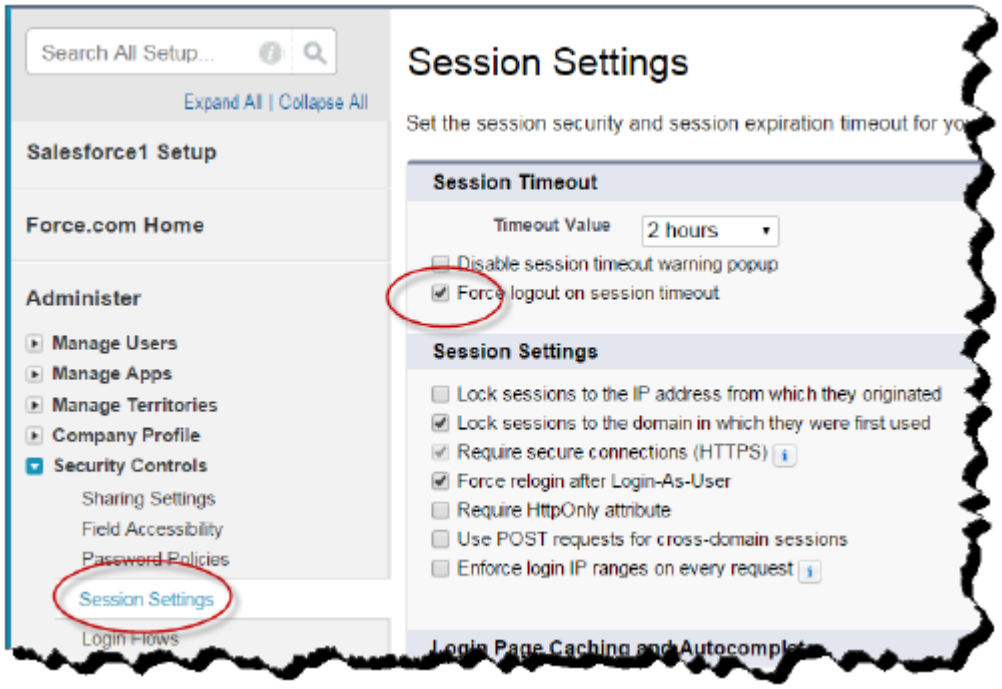
If you do not wish your agents to use Console mode, users of MiVoice Integration for Salesforce are encouraged to use and run from a single tab in Salesforce Classic View. However, a user does not consume additional licenses if they choose to open MiVoice Integration for Salesforce in multiple tabs.

Troubleshooting Tips

The following items are intended to help administrators solve and answer common questions about the user interface and its behavior.

For detailed troubleshooting scenarios and actions, see the *MiVoice Integration for Salesforce Troubleshooting Guide*.

- MiVoice CTI options: When a connected party hangs up while the MiVoice user is creating a consultation call to a third party, the MiVoice user is presented with a disconnect call option only after the MiVoice user is in a call with the third party. For example, the MiVoice user does not have hold, conference, transfer, and dial pad options. The agent can get control of the phone again my clicking Clear (Hang up), and then dealing with the call wrap-up as required by your deployment.
- A MiVoice Business SIP trunk must be properly configured for a Mitel OIG application to receive the required call status event data for SIP trunk call scenarios. The **Assert P Header** and **Allow Display Update** must be enabled in SIP peer signaling form. Refer to the *MiVoice Business System Administration Online Help* for calling party number configuration details.
- Encourage users to refresh their browser window when the MiVoice client appears not to reflect the current state of the call. Individual user desktop and browser activities can affect the display of the client during use.
- Screen-pop issues: Ensure that MiVoice Integration for Salesforce is configured with the user's prime line, and not with secondary lines, Personal Ring Groups, or line appearances. Also ensure that pop-ups are enabled. Microsoft Internet Explorer does not support web browser call notification in the bottom left corner of the monitor for the web browser; Google Chrome web browser does support call notification display.
- If the agent has been inactive for a time, and the MiVoice Integration for Salesforce UI appears to not be working properly when the agent returns to work, check that the Salesforce timeout setting: **Force logout on session timeout** is enabled. This setting is enabled by default.



- It is recommended not to use screen pop to a new tab in Salesforce Classic View; use the Screen pop Existing browser window option instead.
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Installation and Configuration of MiVoice Integration for Salesforce Lightning Experience v2.2

INSTALL MIVOICE INTEGRATION FOR SALESFORCE LIGHTNING EXPERIENCE

Install Mitel MiVoice Integration for Salesforce Lightning Experience by completing the following procedures. The prerequisites and each procedure must be completed for the integration to be successful. These procedures are the same for Salesforce Classic and Salesforce Lightning Experience.

Note: Support for Lightning Experience requires the following:

- MiVoice Integration for Salesforce R2.2.8.0+
- Open Integration Gateway (OIG) R4.1.12.0+
- MiVoice Business (MiVB) R8.0.3.29+ or R9.0.0.184+

See the following sections for information about downloading and installing MiVoice Integration for Salesforce:

- Prerequisites
- Install MiVoice Integration for Salesforce
- Download the MiVoice Integration for Salesforce
- Run the MiVoice Integration for Salesforce

CONFIGURE MIVOICE INTEGRATION FOR SALESFORCE LIGHTNING EXPERIENCE

After the installation is complete, you must customize a Salesforce Call Center for each MiVoice Business controller that will be used and add Salesforce users to each Call Center. Each Salesforce user must have a custom user profile that allows access to the MiVoice Business objects.

Note: Each Salesforce Call Center can be configured with only one MiVoice Business instance. A MiVoice Business instance can be configured with one or more Salesforce Call Centers.

To configure MiVoice Integration for Salesforce Lightning Experience, you must complete the following procedures:

- **Error! Reference source not found.**
- Create the MiVoice for Salesforce Lightning App
- Launch the MiVoice for Salesforce App

CONFIGURE CALL CENTERS TO SUPPORT LIGHTNING EXPERIENCE

To configure the Call Centers, you must complete the following procedures:

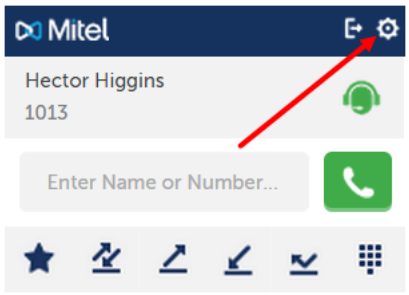
- **Error! Reference source not found.**
- Note the Existing Call Center Details
- Import the New Call Center Definition

Download the New Call Center Definition

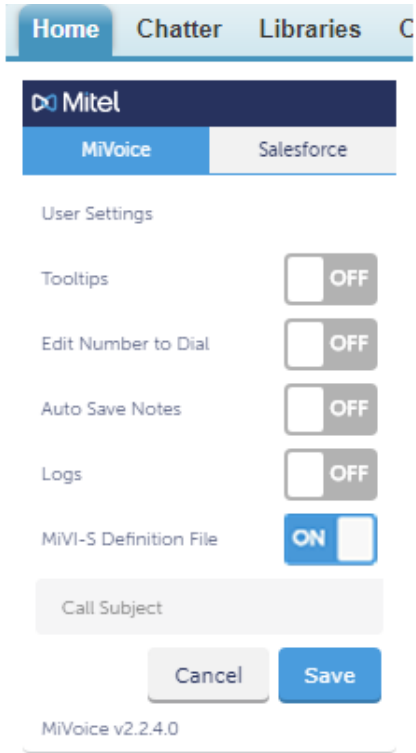
The installed Call Center definition must be replaced with a new definition. You must switch to Salesforce Classic mode to obtain the new definition file.

Note: Before downloading the new call center definition, you must upgrade MiVoice Integration for Salesforce to version 2.2 through the OIG Server Manager Blades Panel.

1. If you are currently using Salesforce Lightning Experience, click your user profile at the top-right of the screen, and then select **Option > Switch to Salesforce Classic**.
2. Click the **Home** tab.
   The MiVoice Integration for Salesforce UI appears in the left panel.
3. Click the Settings icon.



4. Change the **MiVI-S Definition File** setting to **On**, and then click **Save**.



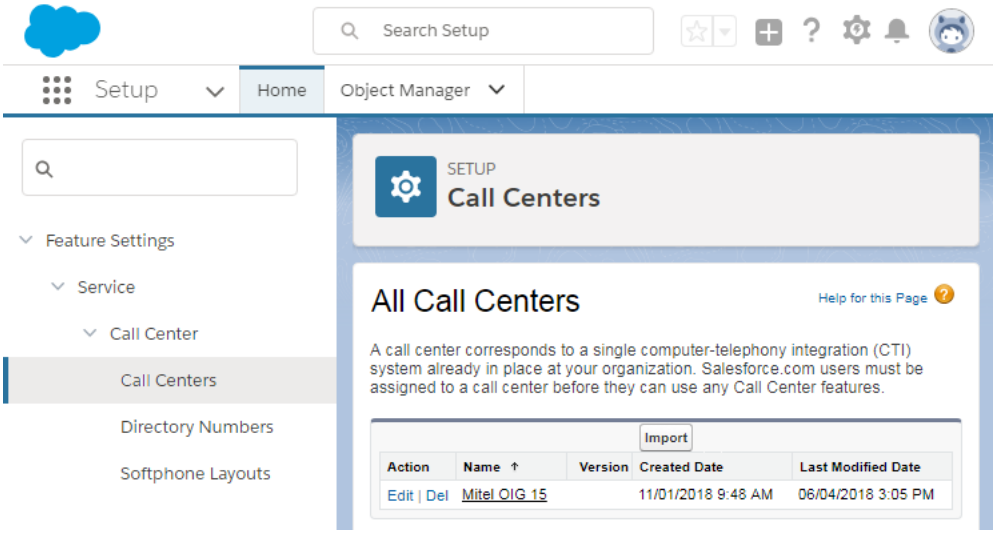
The new OIG Call Center definition file is saved to your download directory as a .ZIP file.

5. Unzip the file to extract all files and note the location where the unzipped files are saved.
6. Click **Switch to Lightning Experience** at the top of the screen, to switch to Salesforce Lightning Experience.

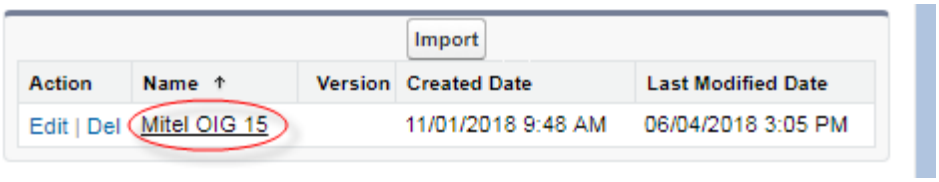
Note the Existing Call Center Details

Before importing the new Call Center definition, you must first note the details for your current Call Center definition so that when the new definition is installed, you can replicate the details.

1. Log in to Salesforce with your administrator credentials.
2. If you are currently using Salesforce Classic, click **Switch to Lightning Experience** at the top of the screen.
3. Hover over the gear icon at the top-right of the screen, and then click **Setup**.
   A menu of items appears on the left side of the screen.
4. Select **Feature Settings > Service > Call Center > Call Centers**.
   The main part of the screen is refreshed, displaying a list of configured Call Centers.



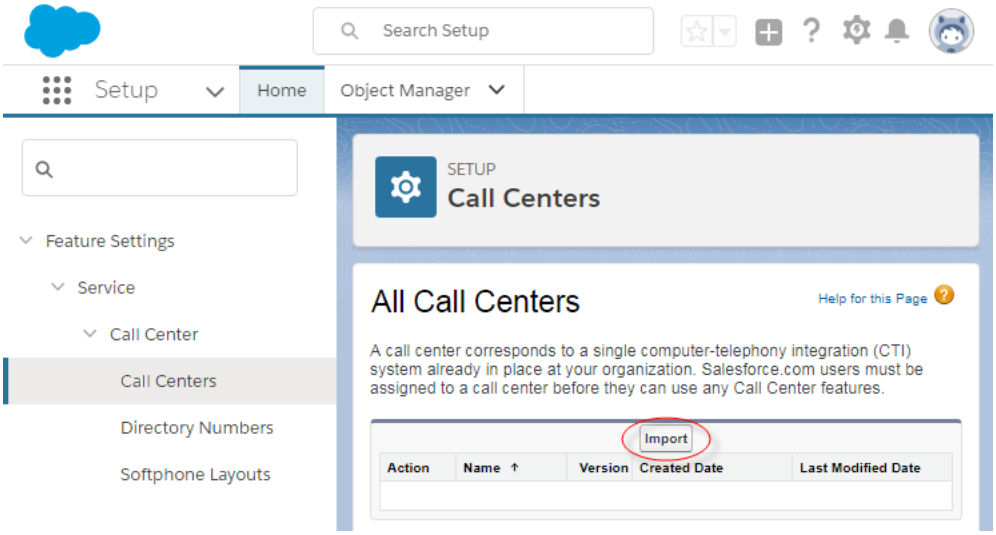
5. Click the name of the Call Center for which you need to note the details.
   The screen is refreshed with the Call Center details.



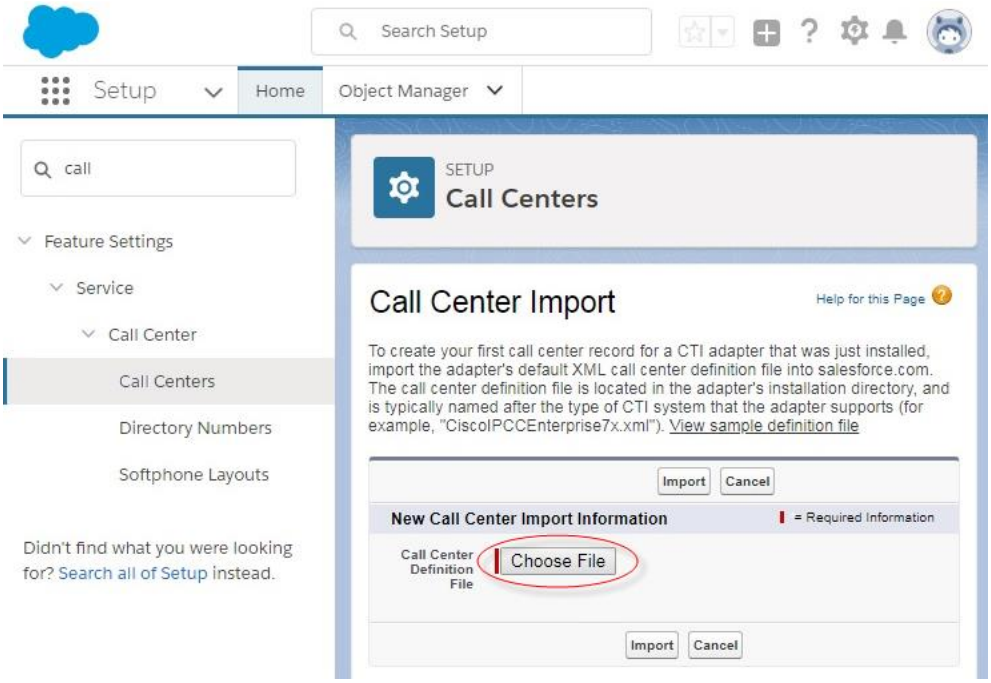
6. Carefully record all existing Call Center details.

Import the New Call Center Definition

1. On the Call Centers Setup page, click **Import**.

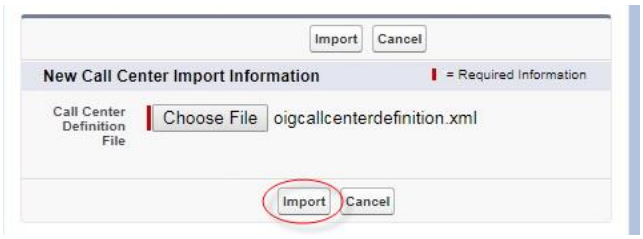


2. Click **Choose File**.



3. Navigate to and select the ***oigcallcenterdefinition.xml*** file that was extracted from the Call Center definition .ZIP file you downloaded, and then click **Open**.

4. Click **Import**.



5. On the Call Centers Setup page, click **Edit** next to the new Call Center.
The screen is refreshed with the Call Center details.

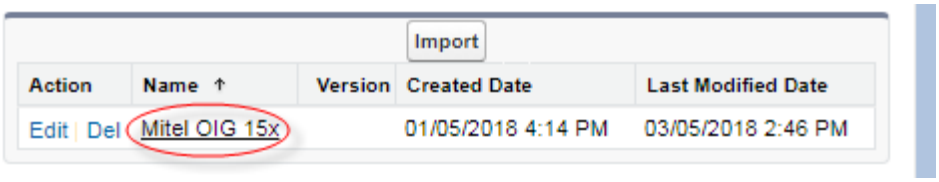


Figure 1: Enter the Call Center details as noted from the previous Call Center, including the internal name (InternalNameAAA**) and the display name (**Display Name**).**

See

6. for a description of each Call Center detail field.

Note: The only detail that should differ from the original Call Center definition is the **Salesforce Compatibility Mode**; this will now be ***Classic_and_Lightning***.

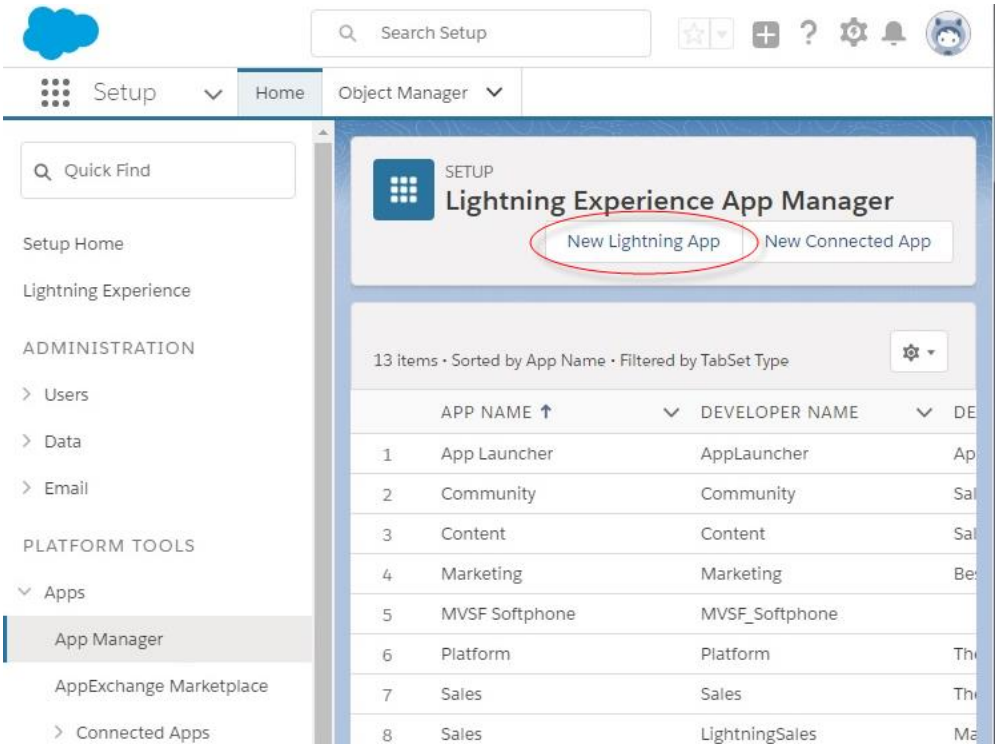
7. Click **Save**.
   The screen refreshes to view mode for the call center details.
8. Edit any additional Call Centers (one call center for each MiVoice Business system), as required.
9. Click **Del** next to the old Call Center to delete the old Call Center definition.

CREATE THE MIVOICE FOR SALESFORCE LIGHTNING APP

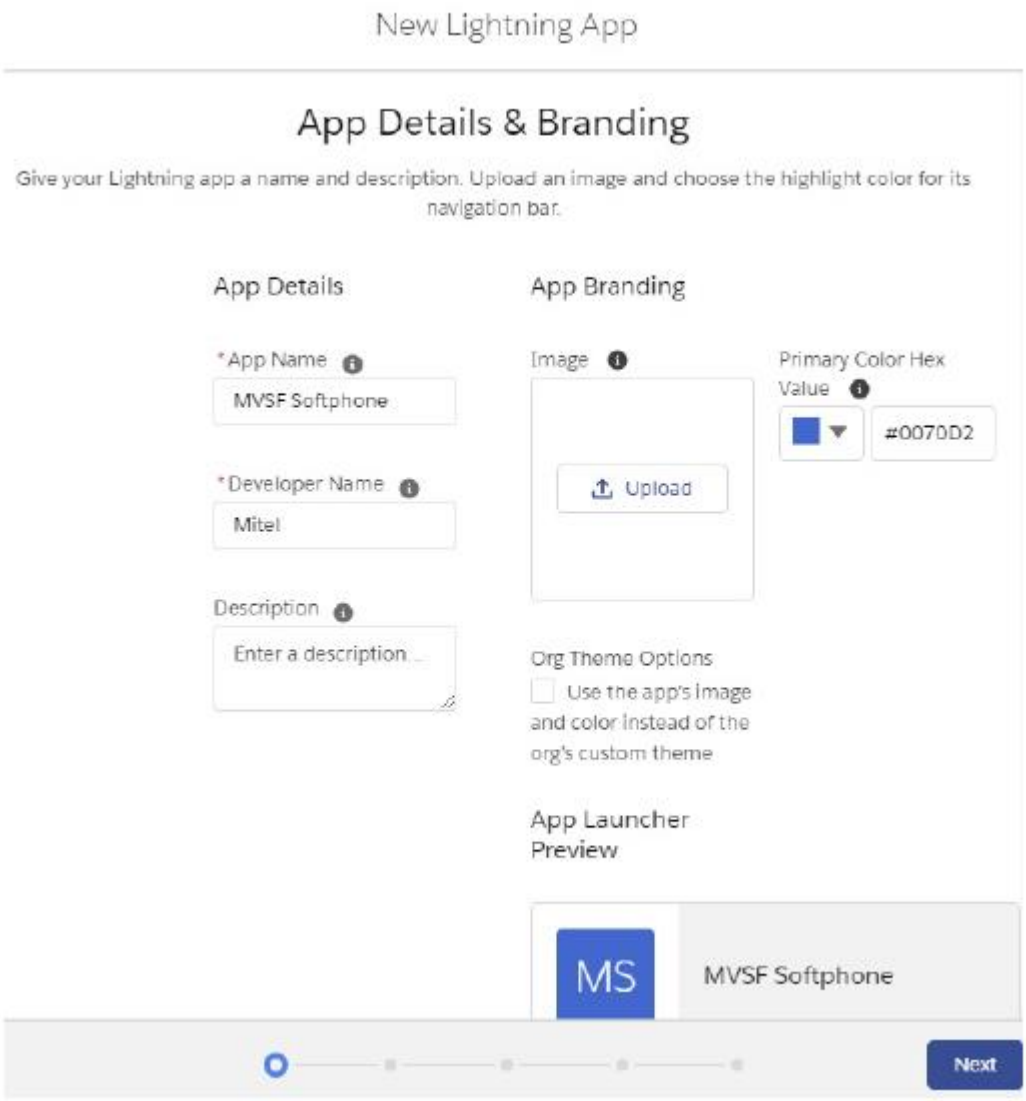
When creating the new MiVoice for Salesforce Lightning app, you will select the Salesforce objects to include in the app and which user profiles have access to the app.

1. Log in to Salesforce with your administrator credentials.
2. If you are currently using Salesforce Classic, click **Switch to Lightning Experience** at the top of the screen.
3. Hover over the gear icon at the top-right of the screen, and then click **Setup**.
   A menu of items appears on the left side of the screen.
4. Select **Apps > App Manager**.
   The main part of the screen refreshes, displaying a list of existing apps.

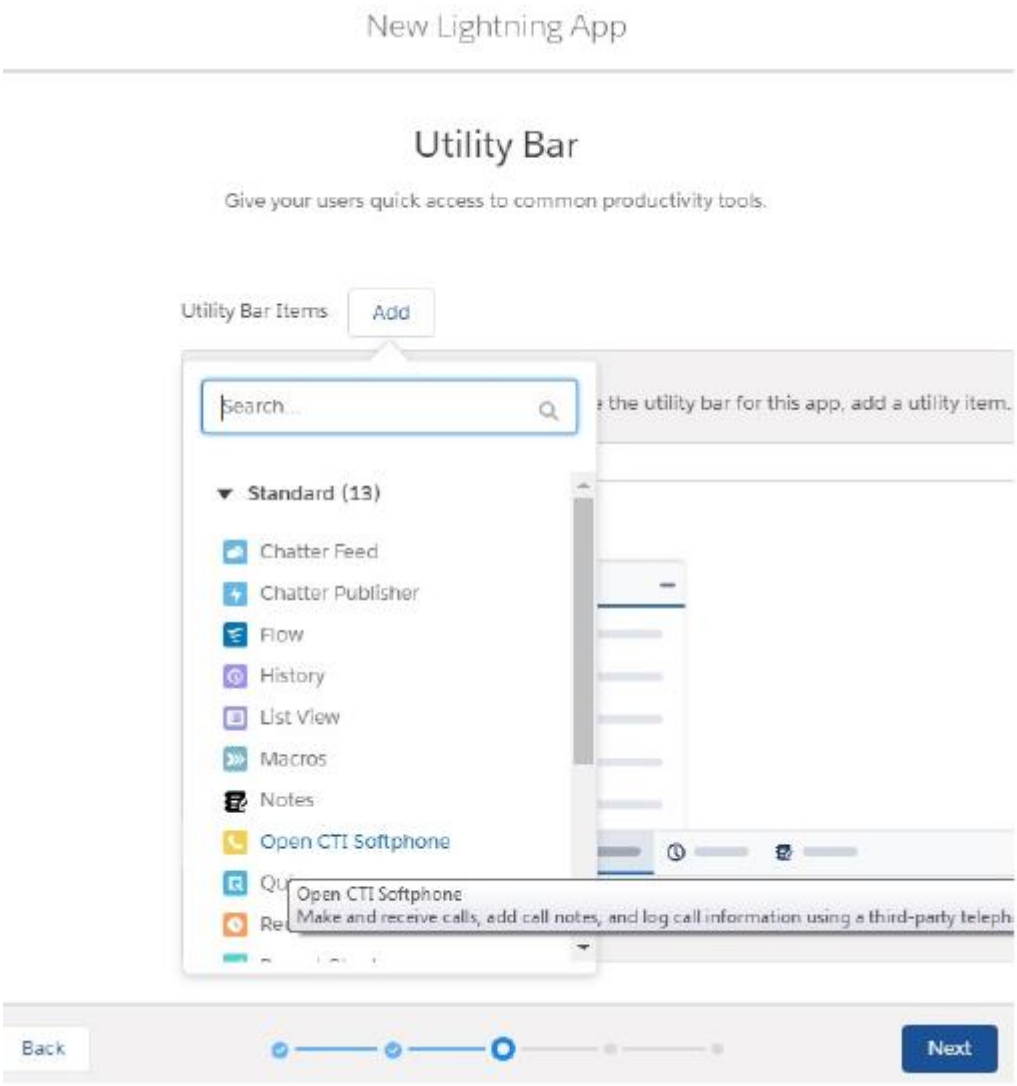
5. Click **New Lightning App**.
   The screen refreshes, displaying the App Details & Branding page.



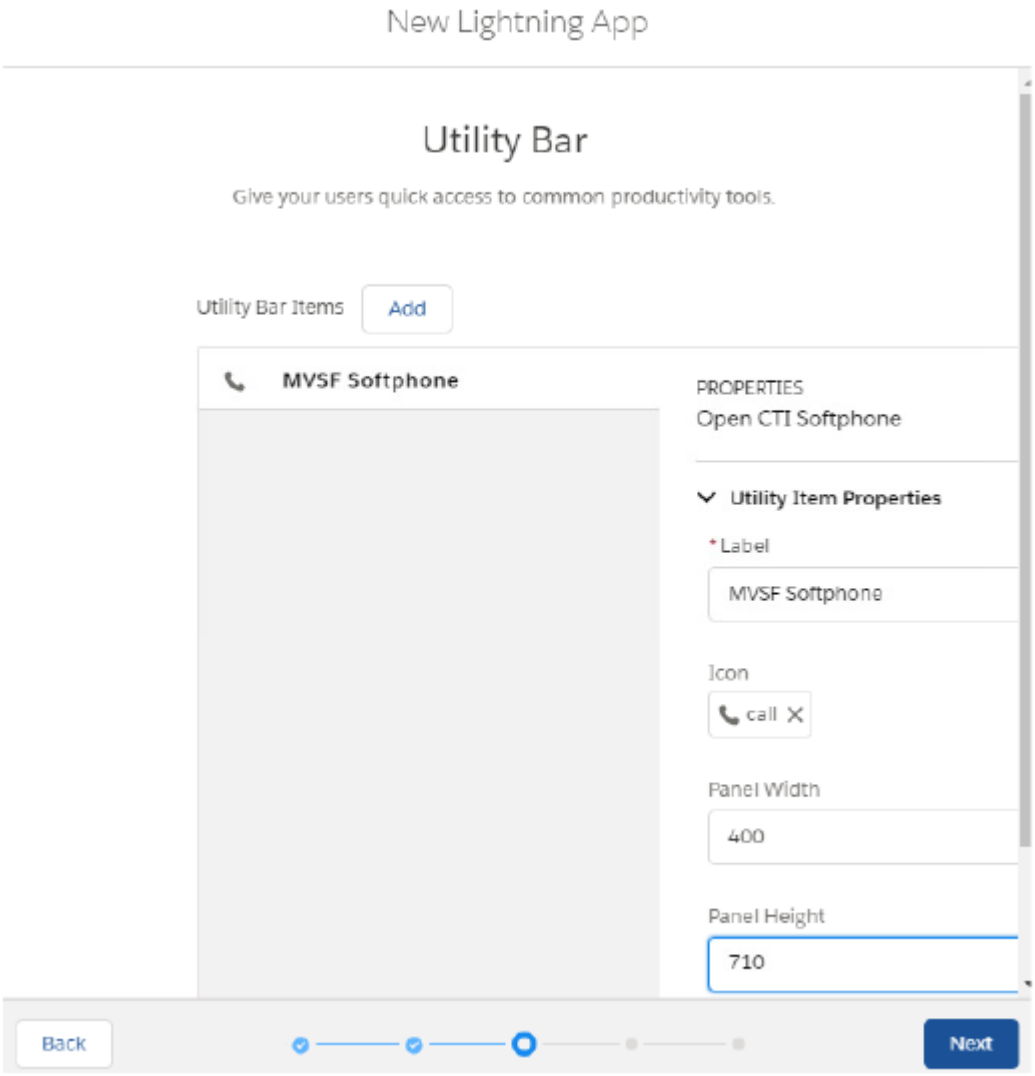
6. Do the following:
   a. Enter a name for the app in the **App Name** field.
   b. Enter the developer name in the **Developer Name** field.
   c. Make any additional desired changes under **App Details** or **App Branding**.
   d. Click **Next**.


New Lightning App
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
*App Name
MVSF Softphone
*Developer Name
Mitel
Description
Enter a description...
App Branding
Image
Upload
Primary Color Hex Value
#0070D2
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
MS
MVSF Softphone
Next

7. Click **Add** next to **Utility Bar** Items, and then select **Open CTI Softphone**.



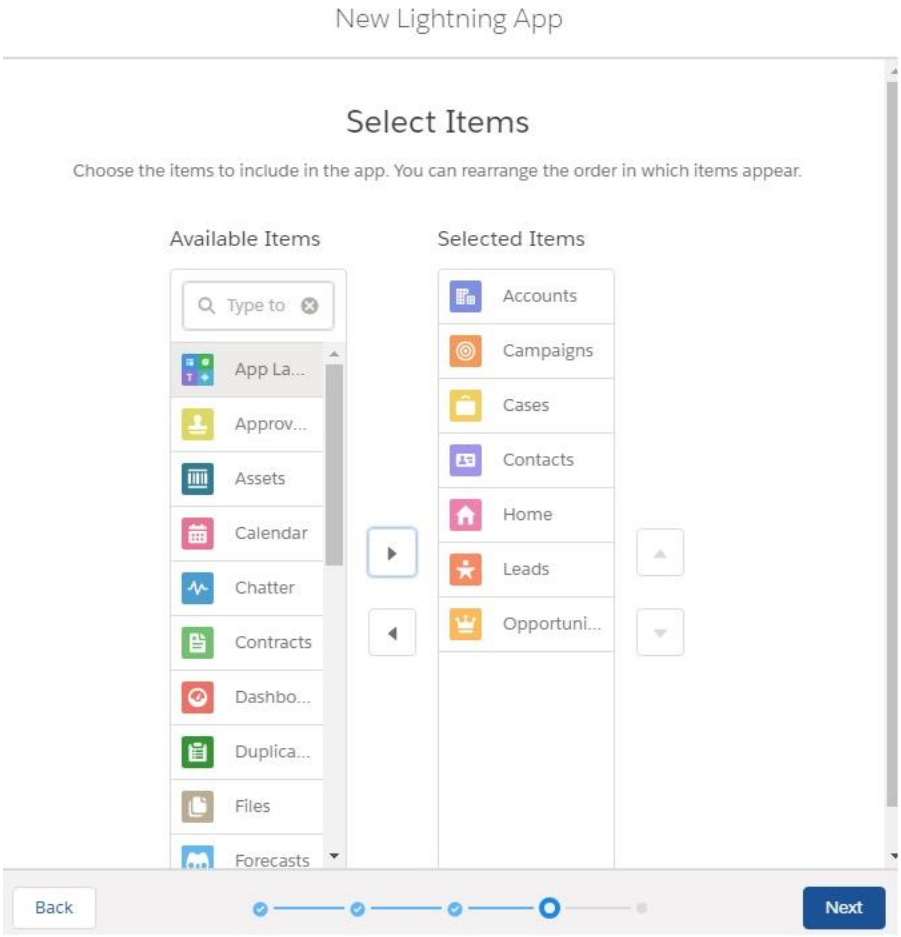
8. Do the following:
   a. Enter a label for the utility bar in the **Label** field.
   b. Enter ***400*** in the **Panel Width** field.
   c. Enter ***710*** in the **Panel Height** field.
   d. Click **Next**.



9. To select the Salesforce objects that you will use with the phone application, do the following:

a. In the **Available Items** list, click the object you will use from the and then click .

b. Repeat step **3a** for each additional object you need to add.
The selected item is moved to the **Selected Items** list. The selected objects shown below are objects used by the MiVoice for Salesforce application; you may need additional objects.

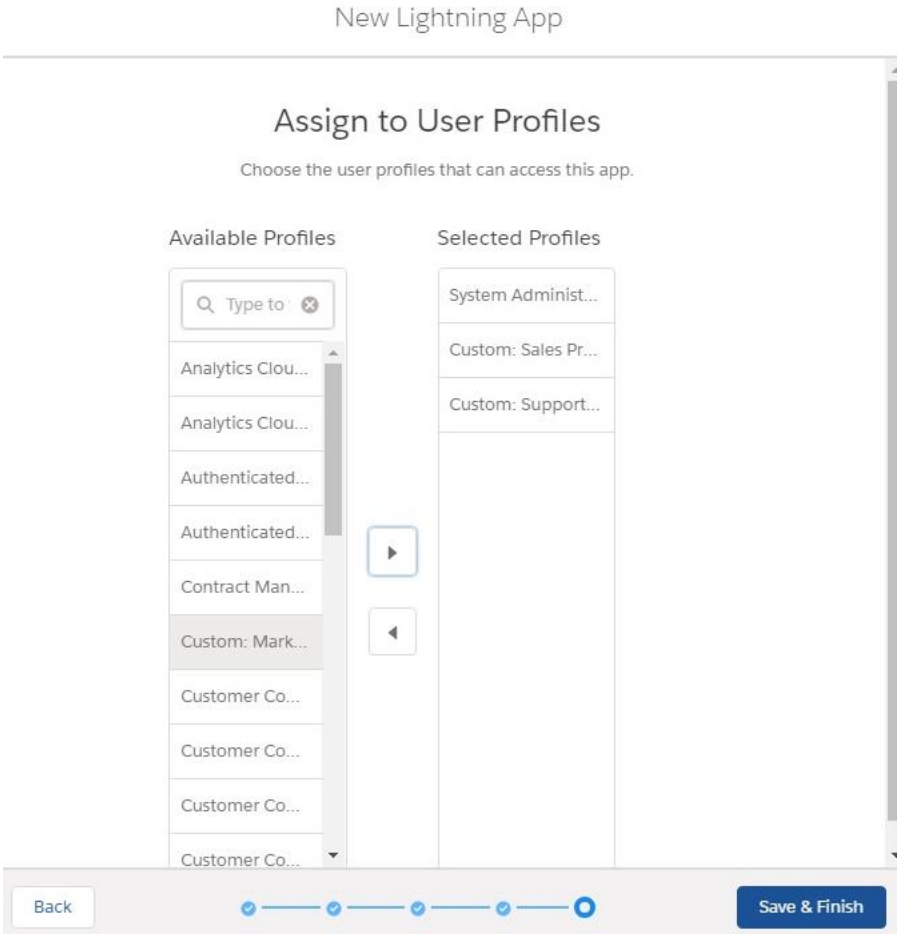


c. Click **Next**.

10. To select the user profiles that can access the app, do the following:

a. In the **Available Profiles** list, click the profile type that you want to have access to the app, and then click ▸.

b. Repeat step **3a** for each additional profile type for which you want to allow access.

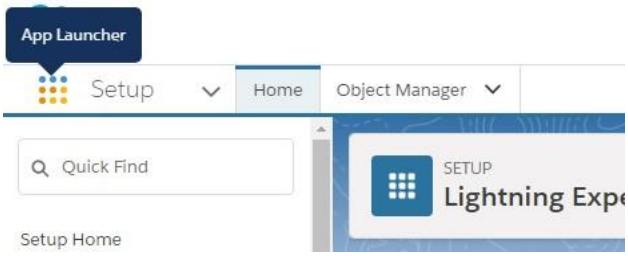


c. Click **Save & Finish**.

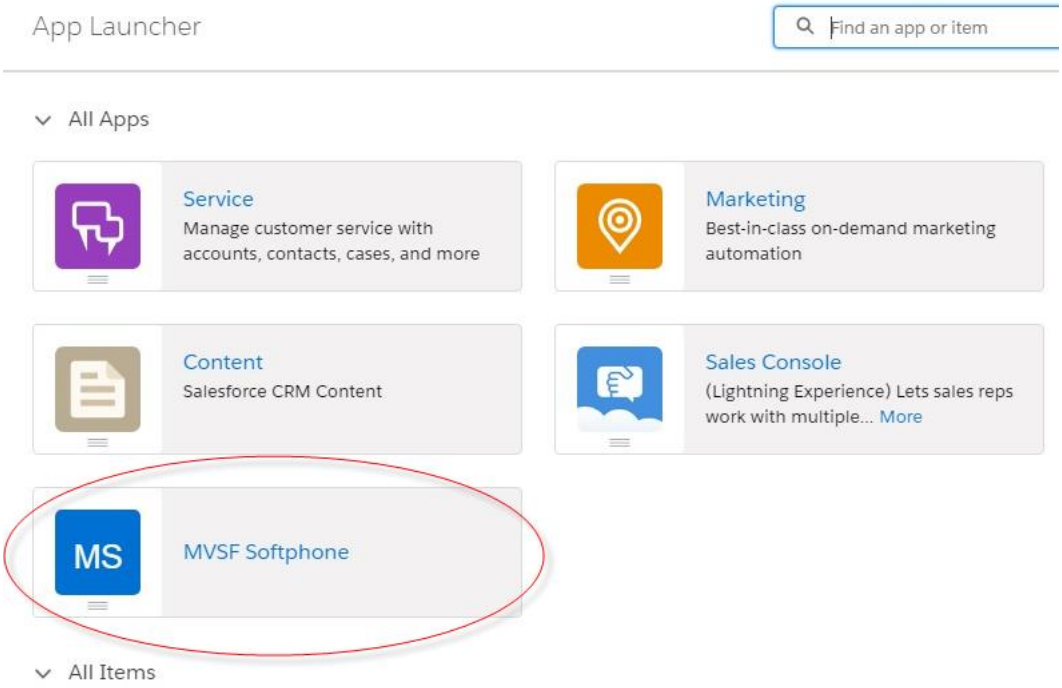
LAUNCH THE MIVOICE FOR SALESFORCE APP

Once you have created the MiVoice for Salesforce Lightning app, users with access to the app can launch the app within Salesforce.

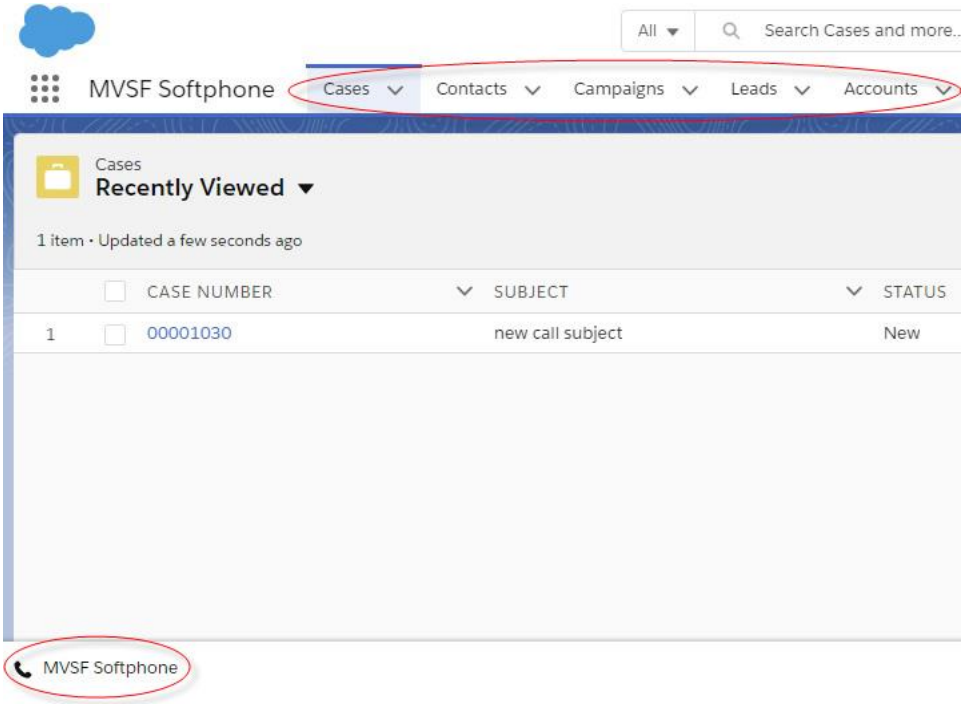
1. Log in to Salesforce.
2. If you are currently using Salesforce Classic, click **Switch to Lightning Experience** at the top of the screen.
3. Click the App Launcher icon at the top-left of the screen.



4. Click the MiVoice for Salesforce Lightning app you created.



The app appears with the selected Salesforce objects appearing as tabs across the top of the page. The phone utility tab appears at the bottom-left of the page.



5. Click the phone tab label to open the phone app.