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, retrieve call; logging of call notes)
- Outbound features (such as search for contacts and click-to-dial)

The MiVoice Integration for Salesforce features are all fully embedded and integrated within the Salesforce web browser window, and will appear on the left-hand side of the Salesforce main screen. The appearance of the client will change based on your call status.

Use this document to help you with:

- “MiVoice Integration for Salesforce feature list” on page 4
- “Configuring the MiVoice Integration for Salesforce” on page 8
- “Installing and validating Mitel OIG self-signed certificate” on page 8
- “Enabling incoming call notifications in your browser” on page 10
“Using the MiVoice Integration for Salesforce features” on page 15

Note: Behavior of SIP devices is not equivalent to behavior of Mitel IP phones.

Mitel strongly recommends that application behavior be comprehensively tested with the specific SIP endpoints that are intended for use, before relying upon specific MiVoice Integration for Salesforce features on SIP devices.

Many of the MiVoice Integration for Salesforce features will work properly if you are a desktop user equipped with a Mitel-certified SIP endpoint. In some cases, features may require a work around such as manually answering the phone because the ‘Answer Call’ feature in the MiVoice Integration for Salesforce client does not work. In addition, some of the dynamic icons (icons that change color/status based on whether your phone is on or off-hook, or on hold) will not work for users on SIP devices. In these cases refreshing the client by clicking on another Salesforce tab may help.
### MiVoice Integration for Salesforce feature list

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

<table>
<thead>
<tr>
<th>Feature</th>
<th>Idle state</th>
<th>Call action</th>
<th>Post call</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity records</td>
<td></td>
<td>✓</td>
<td></td>
<td>Details, including the name, number, date, time, and call length, are automatically saved and linked to the Salesforce contact record.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Note: Auto-saving behaviors for call notes and logs when the call is completed are set by the system administrator.</td>
</tr>
<tr>
<td>Add favorite</td>
<td>✓</td>
<td></td>
<td></td>
<td>Adds a contact to your favorites list from any call list that has been put in an edit mode.</td>
</tr>
<tr>
<td>Answer</td>
<td>✓</td>
<td></td>
<td></td>
<td>Answers an incoming call.</td>
</tr>
<tr>
<td>Call log</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>The log entry for the call that will include any entered call notes. The subject is a text field with a default value of &quot;Call&quot;. The call log can also be ‘related to’ a Salesforce Campaign, Salesforce Opportunity, or Salesforce Case by typing in text to search for.</td>
</tr>
<tr>
<td>Call notes</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>Free form text field to add any details about the call. You can simply type into the box, or use quick notes icon to add the administrator set Quick Notes.</td>
</tr>
<tr>
<td>Clear call</td>
<td>✓</td>
<td></td>
<td></td>
<td>Disconnects and ends an active call. Post call actions like logs and wrap up actions are still displayed, if enabled by the administrator.</td>
</tr>
<tr>
<td>Click to dial (contacts)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>In a Salesforce contact display, select the phone handset icon or click the phone number to dial the contact using that number.</td>
</tr>
<tr>
<td>Click to dial (lists)</td>
<td>✓</td>
<td></td>
<td></td>
<td>In the favorite list or any recent call list, select the phone handset icon or click the phone number to dial the contact using that number.</td>
</tr>
<tr>
<td>Feature</td>
<td>Idle state</td>
<td>Call action</td>
<td>Post call</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------</td>
<td>------------</td>
<td>-------------</td>
<td>-----------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conference</td>
<td></td>
<td>✔</td>
<td></td>
<td>During an active call, click conference to add others to the call for a group discussion. Up to 5 parties can be connected to a conference.</td>
</tr>
<tr>
<td>Conference details</td>
<td></td>
<td>✔</td>
<td></td>
<td>All participants in a conference call are listed, along with their status.</td>
</tr>
<tr>
<td>Console view</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>In a Salesforce Console view, the MiVoice client is available by clicking the phone icon in the bottom right corner of the browser window.</td>
</tr>
<tr>
<td>Consultation hold</td>
<td>✔</td>
<td></td>
<td></td>
<td>Consultation hold is a call state that automatically happens when you attempt to conference or transfer a call. The active call is immediately held while you supervise the transfer or conference by connecting (consult) with the other party.</td>
</tr>
<tr>
<td>Delete favorite</td>
<td>✔</td>
<td></td>
<td></td>
<td>Removes a favorite from the favorite list that is in an edit mode.</td>
</tr>
<tr>
<td>Dialpad</td>
<td></td>
<td>✔</td>
<td></td>
<td>Allows in call DTMF digit entry.</td>
</tr>
<tr>
<td>Edit</td>
<td>✔</td>
<td></td>
<td></td>
<td>Allows to add and remove contact favorites from a list.</td>
</tr>
<tr>
<td>Favorites</td>
<td>✔</td>
<td></td>
<td></td>
<td>An alphabetical list of favorite contacts, created from selecting contacts names from any of the recent calls list. The favorites list includes a top five area that is managed by dragging and dropping contact names in the favorites list into the top five slots.</td>
</tr>
<tr>
<td>Hold call</td>
<td>✔</td>
<td></td>
<td></td>
<td>Holds the active call. The call must be retrieved before you can transfer or conference.</td>
</tr>
<tr>
<td>Make call</td>
<td>✔</td>
<td></td>
<td></td>
<td>Attempts to call the contact displayed in the search field.</td>
</tr>
<tr>
<td>Missed call history</td>
<td>✔</td>
<td></td>
<td></td>
<td>Displays a list of recent incoming calls from Salesforce contacts that were not answered. This list is sorted with the most recent missed calls at the top. Internal calls do not show up in the list.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Feature

<table>
<thead>
<tr>
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<th>Idle state</th>
<th>Call action</th>
<th>Post call</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple phone number matching</td>
<td>✔️</td>
<td></td>
<td>✔️</td>
<td>A contact’s information can contain multiple phone numbers, and phone numbers can be applicable to multiple contacts. When there are multiple matches on an incoming call, the incoming call dialog will display the known caller information (caller ID and number) and identify that there are ‘Multiple Matches’ for the call. Once the call is answered, the call can be identified for the proper contact by selecting correct contact from a drop down list.</td>
</tr>
<tr>
<td>Outgoing call history</td>
<td>✔️</td>
<td></td>
<td></td>
<td>Displays a list of recent outgoing calls that were made to Salesforce contacts. This list is sorted with the most recent call at the top. Internal calls do not show up in the list.</td>
</tr>
<tr>
<td>Pre-answer call alerts</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td>The MiVoice client will display caller details as a pre-answer call alert in the sidebar. The call alert will include any key details available about the caller (name, number, company). The user can choose to answer the call or continue working on their active task. When the Answer icon is clicked, the complete Salesforce Contact record opens in the Salesforce window. If your browser is hidden while you are working on another page or application, a ‘pre-answer call alert’ dialog box will pop open to indicate you have an incoming call. You cannot click the dialog box to answer the call. You must re-open your browser window and click ‘Answer’ in the MiVoice Integration for Salesforce client or answer your physical phone device. <strong>Note:</strong> Pop-up pre-answer notifications do not work correctly when using Internet Explorer.</td>
</tr>
<tr>
<td>Quick notes</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>Adds pre-defined notes to the call log as call notes. The quick notes can be combined with any text that is typed directly into the call notes area. <strong>Note:</strong> This feature must be configured by the system administrator.</td>
</tr>
<tr>
<td>Received call history</td>
<td>✔️</td>
<td></td>
<td></td>
<td>Displays a list of recent calls from Salesforce contacts that were answered. This list is sorted with the most recent call at the top. Internal calls do not show up in the list.</td>
</tr>
<tr>
<td>Redirect call</td>
<td>✔️</td>
<td></td>
<td></td>
<td>Forwards an incoming call to another party without answering it first.</td>
</tr>
<tr>
<td>Feature</td>
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</tr>
<tr>
<td>----------------------</td>
<td>------------</td>
<td>-------------</td>
<td>-----------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Retrieve call</td>
<td></td>
<td>✔</td>
<td></td>
<td>Indicates that a call has been placed on hold and when clicked reconnects the call.</td>
</tr>
<tr>
<td>Search</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>A search bar integrated into the MiVoice client that will search names and numbers in your Salesforce contact database. Selecting one of the results will populate the complete contact name into the search bar and enable you to dial the found contact by clicking the green phone button.</td>
</tr>
<tr>
<td>Settings</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Opens a dialog for configuring logging levels and how Salesforce behaves when a call is received from a non-Salesforce contact. When selected, a new Salesforce contact record will automatically open, pre-populated with any information passed through the phone system (example: caller ID and Name).</td>
</tr>
<tr>
<td>Transfer call</td>
<td>✔</td>
<td></td>
<td></td>
<td>Connects the call to another party. The original call is placed on hold until the transfer call button is clicked again (supervised) or the user who clicked transfer hangs up (unsupervised). Unanswered unsupervised transfers will be routed back to the user who attempted the transfer.</td>
</tr>
<tr>
<td>Visual indication</td>
<td>✔</td>
<td></td>
<td></td>
<td>The information window shows the call status and the duration. When multiple parties are conferenced into the call, the status of each connection will also be provided.</td>
</tr>
</tbody>
</table>
| Wrap up call         | ✔          |             |           | Wrap up allows the user to create follow up actions as part of completing a call.  
**Note:** This feature must be configured by the system administrator. |
Configuring the MiVoice Integration for Salesforce

Newly added users will receive an e-mail from support@salesforce.com containing login credentials for a Salesforce account. The email will include:

- User name
- Login URL

Your password will be set the first time you login.

When you receive the email:

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

**Note:** Once successfully logged in, the Mitel MiVoice user interface will appear on the left side of the screen.

The ![icon] icon indicates your browser detects a self-signed certificate and will not load the Mitel MiVoice interface.

- **a.** Install and validate the Mitel self-signed certificate (See instructions on the next page or search the public Internet for help with your browser.)
- **b.** In a separate browser window enter the URL for the Mitel OIG (ex. https://10.40.224.117/server-manager) and click ‘proceed’ when prompted.

Step (b) may need to be repeated until an administrator installs a CA certificate. Your browser will continually deny self-signed certificates if they are not installed and validated.

4. Add the Salesforce login URL to your bookmarks or favorites
5. Follow the on-screen instructions to simplify future logins.

Installing and validating Mitel OIG self-signed certificate

Users must install and validate the Mitel self-signed certificate (default certificate with the Mitel OIG server) in their browsers when the Mitel OIG server is not configured with a CA certificate.

**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).

- “Internet Explorer (IE)” on page 9
- “Google Chrome” on page 9
- Firefox users please see the Mozilla support page [https://support.mozilla.org/en-US/home](https://support.mozilla.org/en-US/home) for installing a self signed certificate.
Internet Explorer (IE)

1. Browse to the Mitel OIG server site hosting the certificate to trust.
   (https://x.xx.xxx.xxx/server-manager)
2. When told "There is a problem with this website’s security certificate.", choose “Continue to this
   website (not recommended).”
3. Select Tools --> Internet Options.
5. Confirm the URL matches, and click “Add” then “Close”.
6. Close the “Internet Options” dialog box with either “OK” or “Cancel”.
7. Browse to the site again. (Re-type on the address field: https://xx.xx.xxx.xxx/ - same address as
   in step 1)
8. When told "There is a problem with this website’s security certificate.", choose "Continue to this
   website (not recommended)."
9. Click on “Certificate Error” at the right of the address bar and select “View certificates”.
10. Click on “Install Certificate...”, then in the wizard, click “Next”.
11. On the next page select “Place all certificates in the following store”.
12. Click “Browse”, select “Trusted Root Certification Authorities”, and click “OK”.
13. Back in the wizard, click “Next”, then “Finish”.
14. If you get a “Security Warning” message box, click “Yes”.
15. Dismiss the message box with “OK”.
16. Select Tools --> Internet Options.
17. Select Security --> Trusted sites --> Sites.
18. Select the URL you just added, click “Remove”, then “Close”.
19. Shut down all running instances of IE, and then restart IE again.
20. The site’s certificate will now be 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. Click on “Proceed Anyway”.
2. Click on the lock:

3. Click on “Certificate information” link.

4. Go to “Details” tab.
5. Click on “Copy to File”.
6. Click Next.
7. Select “DER encoded binary X.509”. Click Next.
8. Hit “Browse” and browse to a desired folder.
9. Give the certificate a file name, e.g. "oig141_cert". Click Save.
10. Click Next.
11. The file will be saved as "oig141_cert.cer". Take note of the full path where it will be saved.
12. Click Finish.
13. Use Windows Explorer to browse to where the file was saved.
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 asked for confirmation.

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

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**Enabling incoming call notifications in your browser**

Chrome and Firefox browsers support notifications to alert you about an incoming call. Browser notifications are helpful when MiVoice 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:** Internet Explorer does not support browser notifications.

The following sections provide support for configuring your browser notifications.

- “Browser notifications in Chrome” on page 11
- “Browser notifications in Firefox” on page 12
- “Clearing notification settings in Chrome” on page 13
- “Clearing notification settings in Firefox” on page 13

**Note:** Browser Call Notifications 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 ‘Answer Call’. You may also answer using your physical phone device.
Browser notifications in Chrome

1. From the Chrome menu, open the ‘Settings’ page.
   A new tab will open.
2. Click ‘Show advanced settings’ (at the bottom of the page).
   The page will expand to include more categories and settings.
3. Under the ‘Privacy’ category, click ‘Content settings...’.
   The tab will refresh with a new dialog window.
4. Scroll down to the ‘Notifications’ section in the dialog box.
5. Ensure the radio button for ‘Ask when a site wants to show desktop notifications (recommended)’
   is checked.
   A dialog box will pop open if an incoming call is received and the notification rules for the MiVoice
   Integration for Salesforce have not been set.

6. Click ‘OK’ in the dialog box.
7. Click your MiVoice user icon beside your name in the MiVoice client.

   A notification dialog will appear in the top of the browser.
   ![Notification dialog](image)

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

   ![Incoming call notification](image)

Note: Selecting ‘Deny’ will prevent you from being notified of incoming calls.

See “Clearing notification settings in Chrome” on page 13 if you incorrectly set
the wrong value and want to reset your notification settings.
Browser notifications in Firefox

1. A dialog box will pop open if an incoming call is received and the notification rules for the MiVoice Integration for Salesforce have not been set.

![Image of dialog box]

2. Click your MiVoice user icon beside your name in the MiVoice client.

![Image of MiVoice user icon]

A notification dialog will appear in the top of the browser.

![Image of notification dialog]

3. Select ‘Always Show Notifications’ from the ‘Show for this session’ drop down menu in the notification.

![Image of drop down menu]

**Note:** Selecting ‘Always Block Notification’ will prevent you from being notified of incoming calls.

See “Clearing notification settings in Firefox” on page 13 if you incorrectly set the wrong value and want to reset your notification settings.
4. You will now be notified of incoming calls with a pop-up dialog box.

![Incoming Call](image)

**Clearing notification settings in Chrome**

1. From the Chrome menu, open the ‘Settings’ page.
   A new tab will open.
2. Click ‘Show advanced settings’ (at the bottom of the page).
   The page will expand to include more categories and settings.
3. Under the ‘Privacy’ category, click ‘Content settings...’.
   The tab will refresh with a new dialog window.
4. Scroll down to the ‘Notifications’ section in the dialog box.
5. Click the ‘Manage Exceptions’ button under the ‘Notifications’ section.
   The screen will refresh with a list of notification exceptions.
6. Select the exception with ‘OIG’ in the name.
   The notification exception will be highlighted, with an ‘X’ appearing at the very far right of the row.
7. Click the ‘X’ to remove the notification exception.
   The exception will disappear from the list.
8. Click ‘Done’.
   You will be back in the ‘Content Settings’ menu.
9. Click ‘Done’.
   You will be back in the Chrome ‘Settings’ menu.
10. Close the ‘Settings’ tab.
    You will now be prompted to set your notification settings again when an incoming call arrives.

**Clearing notification settings in Firefox**

1. Select ‘History > Clear Recent History...’ from the Firefox menu or ‘Ctrl+Shift+Del’ when you have a Firefox window open.
   A dialog box will open.
2. Change the value of the ‘Time range to clear’ to ‘Everything’.
   The dialog box will expand. Checked items will be cleared.
3. Select ‘Site Preferences’.
   There will be a checkmark in the box.

4. De-select any other history items that you do not want to clear.
5. Click ‘Clear Now’.
   The dialog box will disappear and you will now be prompted to set your notification settings again when an incoming call arrives.
Using the MiVoice Integration for Salesforce features

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

• Managing your interface
  - “MiVoice Integration for Salesforce views” on page 16
  - “Auto create new contacts” on page 16
  - “Client logging levels” on page 16

• Directing calls
  - “Placing a call” on page 16
  - “Monitoring for incoming calls” on page 17
  - “Answering a call” on page 17
  - “Redirecting an incoming call” on page 17
  - “Ending a call (clear)” on page 18
  - “Holding a call” on page 18
  - “Conferencing” on page 18
  - “Transferring a call” on page 19
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• Managing contacts
  - “Adding favorites” on page 20
  - “Editing your top five” on page 20
  - “Removing favorites” on page 20

• Managing call data
  - “Logging call notes” on page 21
  - “Save & exit” on page 22
  - “Save & create follow up task” on page 22
  - “Save & create follow up event” on page 22
  - “Cancel” on page 22

Managing your interface

Salesforce users can customize their client logging settings, their Salesforce views that include the MiVoice client, and the behavior of Salesforce when an unknown contact calls.

Note: MiVoice Integration for Salesforce functions only work on the user’s primary line. The line being used for Salesforce calls must be the same line that is configured on the MiVoice Business Server for the Salesforce user.
MiVoice Integration for Salesforce views

The MiVoice Integration for Salesforce client is displayed on the left side of most Salesforce tabs. Switching Salesforce tabs will not interrupt the call. Minimizing your browser will also not impact your call. If you navigate to a tab that does not display the client, continue working and just return to any tab that normally displays the MiVoice Integration for Salesforce client to manage your call or enter call data.

In addition to the default ‘Contact Center’ view, the MiVoice Integration for Salesforce client is also available in the Salesforce ‘Console’ view. You can launch the MiVoice client by clicking the phone icon in the bottom right corner of the Salesforce ‘Console’ view.

Auto create new contacts

When a call is received from an unknown contact, a Salesforce create new contact window can be automatically opened with any caller information already populated. You can add more contact details and save the contact if appropriate.

1. Click settings
   A dialog box will appear.
2. In the ‘Auto Screen Pop’ section, click the radio button for ‘New Contact’.
   A check mark will appear beside ‘New Contact’.
3. Click the ‘Save and Exit’ icon.

Client logging levels

Two logging levels are available for diagnostic purposes. Log details are intended for system administrators and will not provide information that will be useful to a typical user. Logging level is set to ‘Info’ by default and contains less information than ‘Debug’ level logs.

If a system administrator asks you to change your client’s logging level.

1. Click settings
   A dialog box will appear.
2. In the ‘Logging Level’ section, select ‘Info’ or ‘Debug’ as requested by your system administrator.
   A check mark will appear by the level you selected.
3. Click the ‘Save and Exit’ icon.

Directing calls

Each button in the client window has a tooltip that quickly indicates its function. The buttons and functions available will change based on the status of the call. The following sections provide step-by-step instructions for managing calls.

Placing a call

Choose 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 call icon 📞.
• Select an entry from the favorites or recent history lists and click the phone icon 📞 or the number.
• Click-to-dial a contact in the Salesforce interface by selecting the phone icon 📞 or number for a contact.
• Pre-defined dialing prefixes can be configured by your system administrator.

Monitoring for incoming calls

The MiVoice Integration for Salesforce client has incoming call notifications to help you monitor for incoming calls while you work in other windows or applications. Whenever you are actively logged into Salesforce and your browser is open, you can receive pop-up notifications that there is an incoming call. Answer the call by opening your Salesforce browser window and clicking answer in the MiVoice client or by answering your physical phone. The pre-answer call dialog, whether in the browser window or the pop-up notification, will include the caller’s details.

Answering a call

Incoming calls will automatically display Salesforce contact details. If there are multiple matches for the incoming number, the MiVoice Integration for Salesforce client will display all the potential contact matches for identifying the caller. Unknown Salesforce contacts can also be automatically created by changing your client settings.

When an incoming call arrives you can:

• Answer the call by clicking the call button 📞. If there are multiple contact matches, select the correct contact name from the drop down list once you identify the caller.
• Redirect the call to someone else by clicking the redirect button ➡️.

Redirecting an incoming call

Redirecting a call is only available on incoming calls. Redirection allows you to forward the call to someone else without the call connecting with you.

When the incoming call is ringing:

1. Click the redirect button ➡️. The caller continues to hear ringing.
2. Connect the call to another party by either:
   - Typing their name or number in the search window and clicking the call icon.
   - Looking up the contact in Salesforce and using the click-to-dial function.
3. The call is now ringing the person you redirected it to and you are removed from the call.
Ending a call (clear)

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

1. Click the clear call icon to terminate the call connection.

Call logs and wrap up actions may still be required before the client screen resets to an idle state.

Holding a call

Holding a call is also referred to as a ‘hard-hold’. The call is temporarily parked, and the other party hears music (if configured), and waits for you to return. The call will automatically ring back to you if the hold exceeds the maximum hold time configured by the administrator. You cannot forward or conference a call that is in a hard-hold state.

1. Click the hold button to place the active call on hold.
2. Click the retrieve button 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 the call.

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 button. The active call is put on hold.
2. Call a new participant by either:
   - Typing their name or number in the search window and clicking the call icon.
   - Looking up the contact in Salesforce and using the click-to-dial function.
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.

Note: You can click the conference button 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 them to someone else. Transfers are supervised if you wait for the new party to pick up before transferring the call. You are making an unsupervised transfer if you start the transfer process and then immediately drop yourself from the call before the new party connects. If an unsupervised transfer fails, the call will be rerouted back to you as an incoming call.

1. Click the transfer button .
   The active call is put on hold.
2. Call a new participant by either:
   - Typing their name or number in the search window and clicking the call icon.
   - Looking up the contact in Salesforce and using the click-to-dial function.
3. Click the clear icon  to drop yourself from the call.
   The call continues between the other two parties.

Viewing call history

The MiVoice Integration for Salesforce client maintains three call lists of recent missed, incoming or outgoing calls. Internal calls are not displayed. The most recent calls are displayed at the top of the lists. You can see the call history lists only when you are not in an active call.

- Click the missed call button  to see incoming calls that were not answered.
- Click the outgoing call button  to see calls that you made that were connected.
- Click the received call button  to see calls that you answered.

**Note:** The MiVoice Integration for Salesforce client processes calls where there is a matching Salesforce contact. There are call scenarios where the MiVoice Integration for Salesforce cannot generate complete call records, such as recent call lists or call logs. Scenarios that may result in missing or incomplete records include:

- A missed call matches to multiple contacts
- A missed call does not match any Salesforce contact
- An answered call with no Salesforce contact match and no information entered
- An answered call with multiple Salesforce contact matches but the user did not select a match
- An answered call is associated with a CRM (internal) user that is not a Salesforce contact
- A user has multiple tabs open with the same solution in one web browser

Using the keypad

A virtual keypad is available during calls to send tones (DTMF signals). For example, tones can be required during calls for navigating through an Interactive Voice Response system (IVR). Press the keypad button  to turn the dialpad 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 and select five of those favorites to always be displayed at the top of the list. All other contacts are sorted alphabetically.

Adding favorites

Contacts can be added as favorites from any of the three recent call lists. 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. Click pen icon of the list.
3. Select the star of an entry to add that contact as a favorite.
   Any contact entry in the list with a is already in your favorites.
4. Click the pen icon again when you have added all the favorites you wanted to create.

Editing your top five

The top five area of your favorites list is edited by dragging and dropping the contacts already in your favorites. You can drag and drop contacts from your top five at any time. Removing a contact from the top five does not delete that contact from your favorite list.

Removing favorites

Contacts can be removed as favorites. The contacts will still appear in Salesforce. No contact details are changed by removing them as a favorite.
1. Select your favorites list.
2. If the favorite you want to remove is in the top five portion of the list, drag it out of the top five portion and into the regular part of the favorite list.
3. Click pen icon of the list.
4. Select the ‘X’ icon of an entry to remove that contact as a favorite.
5. Click the pen icon again when you have finished removing the contacts from your favorites.

Managing call data

Documenting calls is simple with notes and logging features that are available both during a call and after the call concludes. 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.

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 pre-defined quick notes.

1. Enter a subject in the call log section. Default subject is ‘Call’.
2. Relate the call to a Salesforce opportunity, campaign, or case by typing a keyword in the ‘Related to’ field. This is optional.
3. Type in a note or click the Quick notes icon and select a pre-defined phrase. The phrases are set by the administrator.
4. Select a wrap-up action.

**Save & exit**

Save and exit is a wrap-up action that saves the call log (call subject, call result, call duration, and comments) in the contact activity history list and then exits to the idle MiVoice UI (not in a call) display.

**Save & create follow up task**

Save & create follow up task is a wrap-up action that saves the call log and exits to the idle MiVoice UI display. A new follow up task will pop open in Salesforce that includes the call info.

**Save & create follow up event**

Save & create follow up event is a wrap-up action that saves the call Log and exits to the idle MiVoice UI display. A new follow up event will pop open in Salesforce that includes the call info.

**Cancel**

Cancel is a wrap-up action that exits to the idle MiVoice UI display without saving any call log information.