

Phone Manager Application Support - SalesForce

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APPLICATION SUPPORT



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SalesForce

Overview

This describes the features that are available when integrating with SalesForce.

Supported Versions

The following SalesForce versions are supported.

Edition	Supported
Contact Manager	
Group	
Professional	 £
Enterprise	
Performance	

£ - Additional SalesForce fees may apply

Features

Integration with SalesForce supports the features listed below:

- [Screen pop for contacts](#)
- [Automatic call history entry](#)

Screen pop

CRM *Contact*, *Account* and/or *Lead* entities can be screen popped directly within SalesForce when an incoming call is received using the caller id or from an outgoing call using the dialed number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* entity was found and the record was automatically displayed using the Users default browser.

The screenshot shows the Salesforce 'Call Center' interface. The top navigation bar includes 'Home', 'Accounts', 'Contacts', 'Cases', 'Solutions', 'Reports', and 'Dashboards'. The main content area displays the 'Contact Detail' for 'Luka Pape', managed by 'Maureen West'. The contact's name is 'Gary Fisher' and the account is 'Mitel'. The phone number is 7774441111. A call center window is overlaid on the right, showing the phone number 7774441111 and a 'Clear call' button.

If multiple matches are found then the *Multiple Contacts Found* window is shown and enables the User to select the correct record to be displayed. For example a call is made to 2225554444 and this has found one matching *Account* entity and three matching *Contact* entities that have this telephone number.

The screenshot shows the 'Multiple Contacts Found' window. The window title is 'Multiple Contacts Found'. The results list contains the following entries:

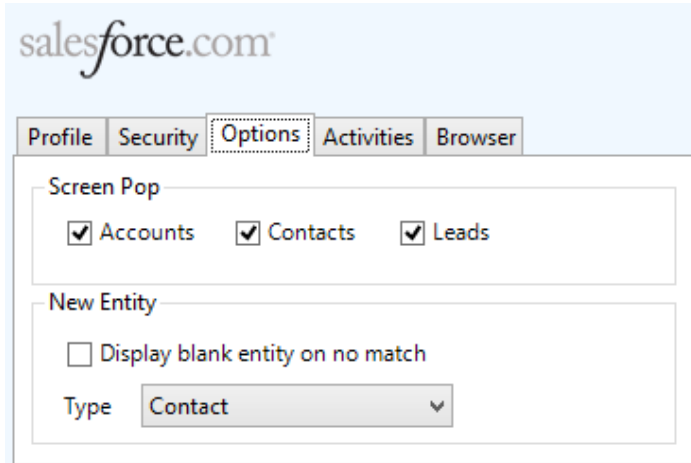
- Account: Mitel
- Contact: Deborah Green
- Contact: Xu Zheng
- Contact: Bastien Beaumont

 A 'Display' button is located at the bottom right of the results list. A call center window is overlaid on the right, showing the phone number 2225554444 and a 'Clear call' button.

The correct entity can then be highlighted and then clicking on the *Display* button will open this record.

Entity and matching options

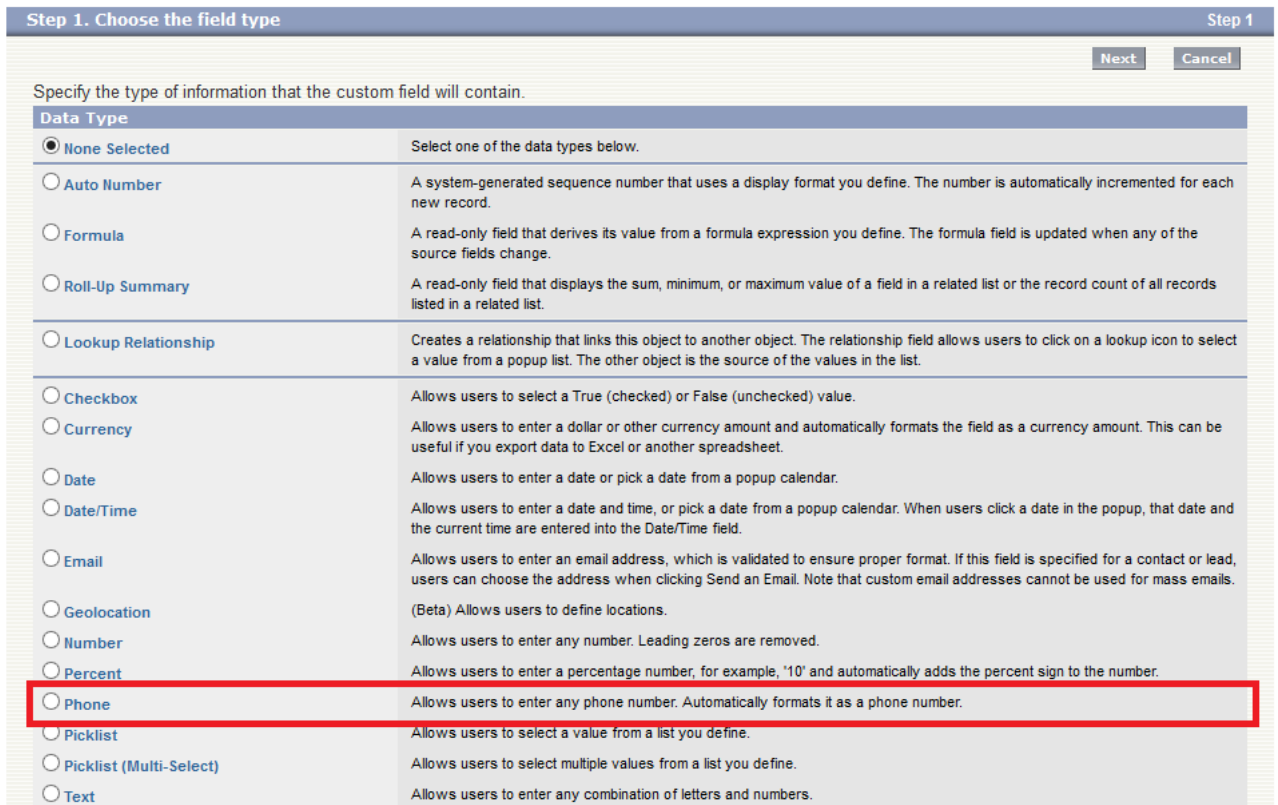
Configuration options are available on the plugin that allow the type of *Entities* to be used in the searching to be set. For example it can be configured so that only the *Contact* entities are searched. These options are set on the *Options* tab



If no match is found when searching for an Entity than a blank form can be automatically displayed to create a New Entity. The Type of Entity, *Contact*, *Account* or *Lead* that is created can be set here.

Search fields

The range of telephone numbers that are to be searched are not configurable. All Salesforce fields that are have the *phone* type will be used.



The format of the telephone number does not make any difference as any type of format is supported. The number dialled/received is used for the searching.

Automatic call history entry

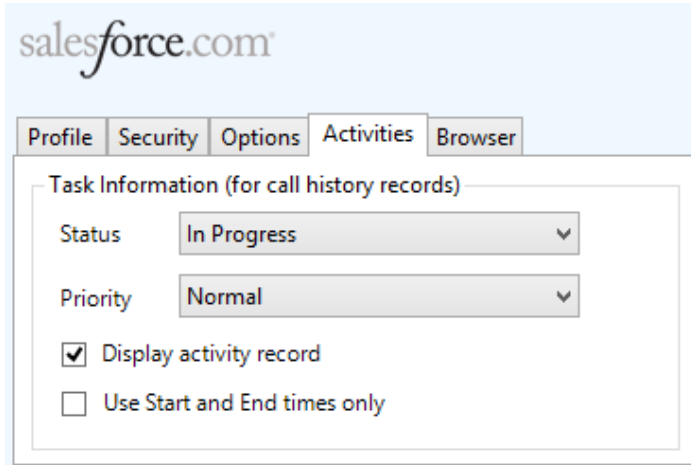
The plugin supports the ability to be able to automatically create and display a Salesforce Phone Task entity. The Entity to associate this with is found using the caller id received or the number dialed, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the [screen popping](#). The telephone numbers used to search are set in the [screen popping](#) section.

The Activity record is automatically created with the information relating to the call entered into the *Comments* field and the related entities are linked as shown.

The screenshot displays the Salesforce Call Center interface. At the top, there is a navigation bar with 'salesforce.com' and 'force.com apps' logos, along with links for 'Setup', 'Developer Console', 'Help', and 'Logout'. A 'Call Center' dropdown menu is visible. Below this is a secondary navigation bar with tabs for 'Home', 'Accounts', 'Contacts', 'Cases', 'Solutions', 'Reports', and 'Dashboards'. The main content area is titled 'Task Inbound call from 7774441111'. It features a 'Task Edit' section with buttons for 'Save', 'Save & New Task', 'Save & New Event', and 'Cancel'. The 'Task Information' section includes fields for 'Assigned To' (Dorian Geroux), 'Status' (In Progress), 'Subject' (Inbound call from 777444), 'Due Date' (25/07/2014), 'Name' (Contact: Craig Kenyon), 'Phone' (7774441111), and 'Priority' (Normal). The 'Description Information' section contains a 'Comments' field with text: 'Start Time : 25/07/2014 15:31:08', 'End Time : 04/08/2014 15:31:08', and 'Call Recording : http://mitelrecorder/default.aspx?recid=1574601'. There is also a checkbox for 'Send Notification Email' and a 'Reminder' section at the bottom.

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialed number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received.
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they not known until the call is cleared.
Call Recording	If integrating with a Xarios Call Recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser). The call event trigger must have been set to at least Call Answered as the call recorder only create the recording id when the call has been answered.

The plugin configuration has several options that can be set to determine how the record is created.



Status: This allows the type of *Status* for the task to be configured. Valid options are: *Not Started, In Progress, Completed, Waiting on someone else, Deferred.*

Priority: This will set the priority of the Task to be *High, Normal* or *Low.*

Display activity record: If this is set then the Task will be displayed when it's created in a new browser window.

Use Start and End times only: If this is set then only the start and end time will be populated into the *Comments* section for a call history entry.

Configuration

For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to Salesforce.

User authentication

The plugin requires a valid Salesforce username and password to be entered. These are the details that will be used for searching and creating history records. Ensure that the user has the appropriate permissions within Salesforce to do this. As a minimum they need to have the *API Enabled* flag set on their *Profile.*

CollaborationFolder		Products	
Members			
Contacts		Solutions	
Content		Tasks	
Contracts			
Administrative Permissions			
API Enabled	<input checked="" type="checkbox"/>	Manage Mobile Configurations	<input type="checkbox"/>
Assign Permission Sets	<input type="checkbox"/>	Manage Package Licenses	<input type="checkbox"/>
Author Apex	<input type="checkbox"/>	Manage Password Policies	<input type="checkbox"/>
Bulk API Hard Delete	<input type="checkbox"/>	Manage Profiles and Permission	<input type="checkbox"/>

Security

The Security tab enables the type of access and location of the Salesforce services to be set.

salesforce.com

Profile Security Options Activities Browser

Server

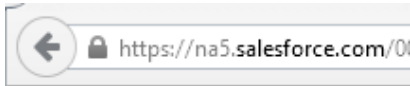
URL

Token

Use security token

Security Token

Server -> URL: This should be set to Salesforce server that your organization uses. This can be found by looking at the URL that is displayed in the address bar of the web browser once you have logged into Salesforce.



Token: Depending on the security configuration of Salesforce and how it is accessed will dictate what options are required. To connect to the Salesforce API requires that the public IP address that the user is connecting from is configured in the *Administration Setup -> Network Access* section under *Trusted IP Ranges*.

Quick Find

[Expand All](#) | [Collapse All](#)

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- Call Center Settings

Administration Setup

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
 - Sharing Settings
 - Field Accessibility
 - Password Policies
 - Session Settings
- Network Access**

Network Access [Help for this Page](#) ?

The list below contains IP address ranges from sources that your organization trusts. Users logging in to salesforce.com with a browser from trusted networks are allowed to access salesforce.com without having to activate their computers.

Trusted IP Ranges <input type="button" value="New"/>			
Action	Start IP Address	End IP Address	Description
Edit Del	78.158.57.34	78.158.57.46	
Edit Del	78.158.57.46	78.158.57.46	

If this cannot be configured, for example if you have remote workers whose IP address changes all the time. Then the Security Token option will need to be enabled.

To create a Security Token from the *Personal Setup -> My Personal Information -> Reset My Security Token* section of Salesforce.com, select the *Reset Security Token* button. This will send an email to the associated user with their Security Token.

Quick Find

[Expand All](#) | [Collapse All](#)

Force.com Home

System Overview

Personal Setup

- My Personal Information
 - Personal Information
 - Change My Password
 - Reset My Security Token
 - My Groups
 - Change My Display
 - Grant Login Access
 - Calendar Sharing

Reset Security Token [Help for this Page](#)

Clicking the button below invalidates your existing token. After resetting your token, you will have to use the new token in all API applications.

When accessing salesforce.com from outside of your company's trusted networks, you must add a security token to your password to log in to the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.

Your security token is tied to your password and subject to any password policies your administrators have configured. Whenever your password is reset, your security token is also reset.

For security reasons, your security token is delivered to the email address associated with your account. To reset and send your security token, click the button below.

[Reset Security Token](#)

The email will contain the token and will look similar to the one shown below:

- y67lBpMdiBY02RkbDWqwhCEX

This value then needs to be entered into the Security Token section.