

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 dialled 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', owned by 'Maureen West'. The contact information includes Name (Gary Fisher), Account Name (Mitel), Title, Department, Birthdate, Reports To (View Org Chart), Lead Source, Mailing Address, Languages, Level, Created By (Gary Fisher, 25/07/2014 14:52), and Last Modified By (Gary Fisher, 25/07/2014 14:52). A call log on the right shows a call to 7774441111 with a duration of 00:02 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 222555444 and this has found one matching *Account* entity and three matching *Contact* entities that have this telephone number.

The screenshot shows a 'Multiple Contacts Found' dialog box with a 'Results' list containing: Account: Mitel, Contact: Deborah Green, Contact: Xu Zheng, and Contact: Bastien Beaumont. A 'Display' button is at the bottom right of the dialog. To the right, a call log shows a call to 2225554444 with a duration of 00:01 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

The screenshot shows the Salesforce user interface with the 'Options' tab selected. Under the 'Screen Pop' section, there are three checked checkboxes: 'Accounts', 'Contacts', and 'Leads'. Under the 'New Entity' section, there is an unchecked checkbox for 'Display blank entity on no match' and a dropdown menu for 'Type' currently set to 'Contact'.

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 screenshot shows the 'Step 1. Choose the field type' dialog box. The 'Data Type' section is expanded, showing a list of options. The 'Phone' option is highlighted with a red box. The 'None Selected' option is currently selected.

Data Type	Description
<input checked="" type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input type="radio"/> Roll-Up Summary	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
<input type="radio"/> Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
<input type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar.
<input type="radio"/> Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the popup, that date and the current time are entered into the Date/Time field.
<input type="radio"/> Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
<input type="radio"/> Geolocation	(Beta) Allows users to define locations.
<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input type="radio"/> Text	Allows users to enter any combination of letters and numbers.

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

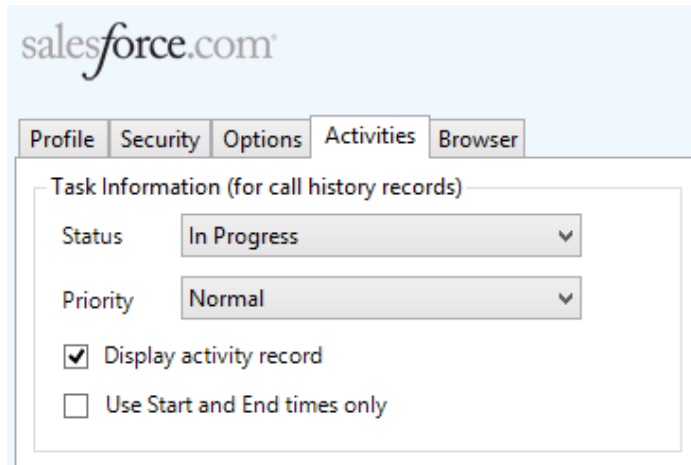
The plugin supports the ability to be able to automatically create and display a Salesforce Phone Task entity. The Entity to associate this with is found using the caller id received or the number dialled, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the [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 shows 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' and includes a 'Task Edit' section with buttons for 'Save', 'Save & New Task', 'Save & New Event', and 'Cancel'. The 'Task Information' section contains fields for 'Assigned To' (Dorian Geroux), 'Status' (In Progress), 'Subject' (Inbound call from 7774441111), 'Due Date' (25/07/2014), 'Name' (Contact - Craig Kenyon), 'Phone' (7774441111), and 'Priority' (Normal). The 'Description Information' section has 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 'Send Notification Email' checkbox and a 'Reminder' section at the bottom.

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled 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 on.
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 are not known until the call is cleared.
Call Recording	If integrating with a 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 will 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.*

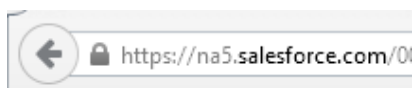
CollaborationFolder		Products	
Members			
Contacts		Solutions	
Content		Tasks	
Contracts			
Administrative Permissions			
API Enabled	<input checked="" type="checkbox"/>	Manage Mobile Configurations	<input type="checkbox"/>
Assign Permission Sets	<input type="checkbox"/>	Manage Package Licenses	<input 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.

The screenshot shows the Salesforce.com settings page with the 'Security' tab selected. Under the 'Server' section, the 'URL' field is populated with 'https://na5.salesforce.com/'. Under the 'Token' section, the 'Use security token' checkbox is unchecked, and the 'Security Token' field is empty.

Server -> URL: This should be set to Salesforce server that your organisation 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*.

The screenshot shows the Salesforce.com Administration Setup page. The left sidebar contains a 'Quick Find' search bar and a list of navigation options. The 'Network Access' option is highlighted with a red box. The main content area shows the 'Network Access' section with a 'Help for this Page' link. Below the section header, there is a text block explaining that the list below contains IP address ranges from sources that your organization trusts. Below this text is a table titled 'Trusted IP Ranges' with a 'New' button and a table with columns for 'Action', 'Start IP Address', 'End IP Address', and 'Description'.

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.