

SalesForce - Best Practices

GENERAL INFORMATION

The SalesForce Connector, available with our MiContact Center software runs on your client computers to allow them to use the SalesForce.COM website in coordination with your Mitel phone system.

The SalesForce Connector maintains communication between:

- The SalesForce Connector itself
- The Enterprise Server
- The PBX that the phone is connected to
- The Browser on the client computer
- The salesforce.com website.

Because of this complex mix of communications the SalesForce Connector can be sensitive to computer and network security implementations. Following these best practices will help to ensure the best performance from your SalesForce Connector application.

BEST PRACTICES

Windows Updates: We have seen issues with the real-time statistics, such as call duration on client computers that had fallen behind with their windows updates. We recommend ensuring that your client computers have the most recent critical updates.

Firewalls: We recommend not having a local Firewall on your client computers or servers. The network itself will need to be protected, but you should ensure that you allow communications between the clients, server, and PBX. The following knowledgebase article covers all our TCP and UDP port considerations.

<http://micc.mitel.com/kb/KnowledgebaseArticle51887.aspx>

- **NOTE:** Even if you are using physical deskphones you should ensure that any ports normally associated to softphone should be open to traffic in both directions. The SalesForce Connector uses MiTAI call event and call control commands to interface directly from the website.

Web browsers: We support Internet Explorer 8, 9, 10, and 11. On occasion we have tested other browsers, however our support is limited to those browsers specified in our System Engineering Guide.

- Ensure that **Mixed Content** is **Enabled** in all three security zones (Internet, Intranet, Trusted).
- Ensure that **Protected Mode** is **Disabled** for all three zones (Internet, Intranet, Trusted).

- **Remove** the checkmark beside **Require server verification...** in Trusted Sites.
- Add ***.salesforce.com** to your **Trusted Sites**.
- Ensure that any Pop-Up blockers are disabled.
- For IE9 and IE10, browse to salesforce.com and ensure that **Compatibility Mode** is **Enabled**.

Logging into the Connector: When launching Salesforce, the ideal order is:

- Log into your phone. If you have an Agent ID, log in as this, otherwise ensure that your Extension is live.
- Launch the Salesforce Connector. The only indication that it is running will be an icon in your system tray.
- Launch your web browser, and log into Salesforce.com
- Connect to your phone system in the CTI Adapter at the top left of the website.
 - **NOTE:** The connector is looking for the same information that the PhoneSet Manager would:
 - CCM username
 - CCM password
 - Agent ID (if you are an ACD agent)
 - Extension (in the case of a hotdesking Agent, this is the extension which you are taking out of service, not the agent ID).

TROUBLESHOOTING

For any Salesforce issues, before contacting support please start with the following:

1. Ensure that the **SalesForce Connector** is running (found in the system tray).
2. Right click on the **SalesForce Connector** and select **Logging**.
3. Ensure that logging is set to **High**.
4. Ensure that both log files are being saved to **\MyDocuments\CCMLogs** for ease of collection.

Logs: Salesforce generates the following logs:

- **SalesForceCTI.TXT:** This is the log file for the MiContact Center Salesforce Connector itself. It contains logging for its startup, shutdown, and any connector specific errors.
 - **NOTE:** This log file is relatively new, and may not be present on older versions of the software.
- **Mitel3300AdapterEngineLog.TXT:** This log file shows the transactions between the Salesforce Connector and the PBX. Look to this log file for call events, or call control commands.
- **CTI_Connector.TXT:** This log contains the updates from the Salesforce adapter, as it communicates with the website. This will show you the call events as they are seen from the connector, including the XML updates sent to the website.
- **Browser_Connector.TXT:** When updates are sent between the website and the connector, they are relayed through an invisible browser in the background. This log shows what passes through that browser.

APPLIES TO

SalesForce, all versions.

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