

Office@Hand for Salesforce Lightning

Admin Guide



CONTENT

Introduction	4
About Office@Hand for Salesforce	4
About this guide	4
System requirements	4
Salesforce edition	4
Other system requirements	4
Installation and Setting up the Call Center	5
Step 1: Install Office@Hand for Salesforce	5
Steps for setup and configurations for first time installation	6
Steps for setup and configurations for upgrade to new version	10
Step 2: Configure the Call Center	10
Step 3: Add Users to the Call Center	15
Setting up SoftPhone Layouts in Salesforce	19
Step 1: Set up a SoftPhone Layout	19
Step 2: Assign the SoftPhone Layout to Users	23
Enabling Office@Hand Meetings through Global Action	24
Setting up Global Action Layout in Salesforce	24
Step 1: Navigate to Global Action Layout configurator	24
Step 2: Configure the layout	24
Step 3: Assign to roles	26
Launching app in Lightning View	27
Add Open CTI Softphone to Your Lightning App	31
Setting up preset call dispositions	36
Sharing Report folder with users	40
AdminUI	43
Call Recording	45
Analytics Report	48
Prerequisites: Define hierarchy and assign roles to users in Salesforce	48
Entry for Analytics Report	50
Team view vs. Individual view	51
Cloud Phone Reports (beta)	52
Adding Office@Hand Call and SMS options to Salesforce mobile app	54
Creating New Actions	54
Adding Actions to Salesforce mobile app	57
High Velocity Sales (HVS) settings (beta)	61

Enabling HVS Mode	61
Selecting a custom field for HVS Disposition	61
Marking HVS Disposition as a required field	62
Redirecting incoming calls to voicemail	62
Modify your HVS Disposition value in the Object Manager	63
Configuring your HVS call result matching in High Velocity Sales Settings	64
Enabling Do Not Contact	65
Troubleshooting	71

Introduction

About Office@Hand for Salesforce

Office@Hand for Salesforce provides seamless integration between Salesforce.com and your Office@Hand services to enable improved customer retention, greater agent productivity, and advanced business processes.

About this guide

This guide is specifically designed for System Administrators of the Salesforce.com application. This guide is not intended for end users and does not provide any information on how to use the application or any related information. This admin guide will show you how to set up your Salesforce.com instance to enable your users to use Office@Hand for Salesforce within their Salesforce.com interface.

System requirements

Salesforce edition

- Professional, Enterprise, Unlimited


Other system requirements

- Office@Hand Premium or Enterprise
- Windows XP or above
- MAC OS X 10.8 Mountain Lion or above
- IE11+ / Microsoft Edge 38+ / Firefox 52+ / Chrome 56+ / Safari 11+ (Classic only)
- Office@Hand Softphone
- .Net Framework 3.5
- 10 digit phone system

Installation and Setting up the Call Center


Step 1: Install Office@Hand for Salesforce

Install [Office@Hand for Salesforce](#) package from the RingCentral app gallery. Installation of this application requires an administrator login to Salesforce.com. Click **Visit page to download** to be redirected to Salesforce.com. During installation, you will be asked what subset of users to whom you wish to grant access. It is generally recommended to select **Install for All users** as this will ensure that Step 2 below will go smoothly. Users will not have access to Office@Hand for Salesforce until the administrator adds them to the Call Center as detailed below.



[Sign in](#)

[← Back](#)

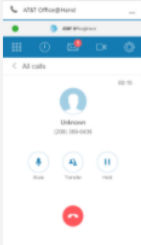
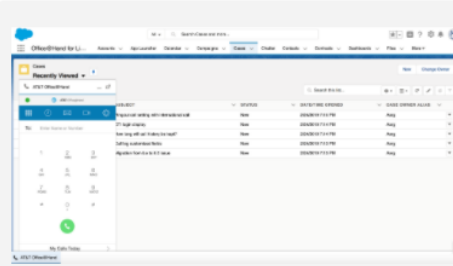


Office@Hand for Salesforce

by RingCentral

Integrate your Office@Hand phone system directly into your Salesforce account and start creating a more collaborative CRM experience.

[Visit page to download](#)



CATEGORIES

[Analytics](#)[CRM](#)[Customer Support](#)

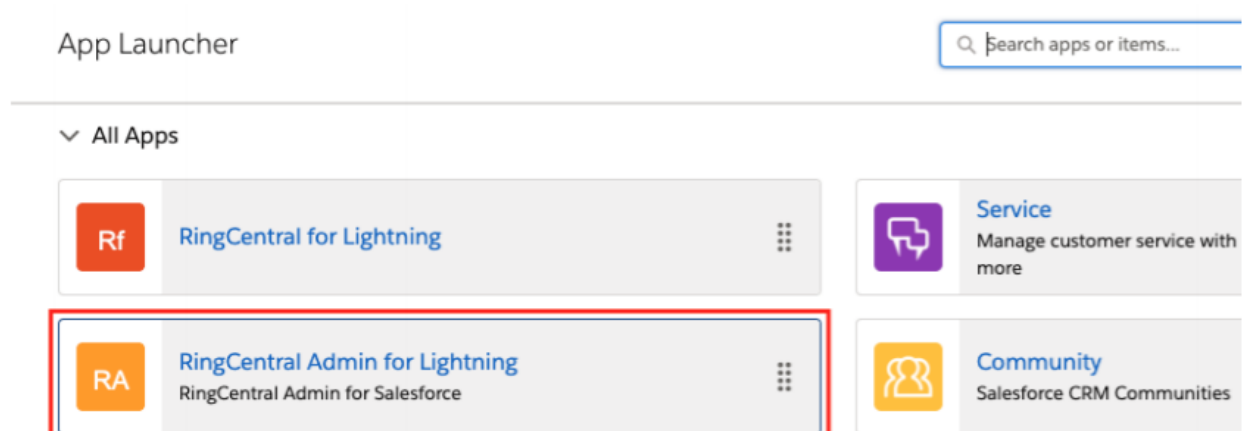
Salesforce App Integration for Office@Hand

Let Office@Hand for Salesforce enhance your CRM experience by automating workflows, increasing call efficiency and improving the quality of customer interactions. The integration lets you make and receive calls directly from your Salesforce account. You can also quickly assign call dispositions, log calls, take notes, schedule meetings and more, without jumping back and forth between applications.

Steps for setup and configurations for first time installation

If this is the first time you have installed Office@Hand for Salesforce you can use the new Install wizard tool to setup & configure the CTI. Please follow the steps below to access the Install wizard and start your setup and configuration.

Install wizard can be accessed from the Salesforce App Launcher by clicking on the **Office@Hand Admin for Lightning**.



The Install wizard will guide you through all the required steps for configuring the Office@Hand for Salesforce application. The install wizard is divided into seven steps for configuring various settings.

1. **Welcome:** This step is for informational purposes and needs no action. It shows the major version of the app that is being installed.
2. **Setup Your Call Center:** In this step you will create the Call Center for your organization. Click the **Create Call Center** button to create the call center.

✓ 2 **Setup Your Call Center**

In this step you will create your Call Center, configure Call Dispositions and enable users in your organization to access their RingCentral call recordings.

Call Center Configuration

In this step you will create your Call Center for your organization. Selecting the "Create Call Center" button below will initiate and auto generate your Call Center details. Once Call Center setup is complete you can review the settings and details using the "Launch Salesforce Setup" button.

[Create Call Center](#)

[Launch Salesforce Setup](#) [Open Setup Guide Window](#)

Create Call Center

Only use this button if you have not previously configured a call center for RingCentral in this org.

[Cancel](#) [Create](#)

The creation of a call center can be verified by clicking on the **Launch Salesforce Setup** button.

Note: If the call center creation button is greyed out in the install wizard and there is no Call Center for Office@Hand, refer to the Troubleshooting section for instructions on manually creating the Call Center.

SETUP
Call Centers

Call Center
RingCentral
[All Call Centers](#) » RingCentral

Call Center Detail Edit Delete Clone

General Information

Internal Name	RingCentral
Display Name	RingCentral
CTI Adapter URL	https://ringcentralcom-a-dev-ed--rcsfl.visualforce.com/apex/OpenCTIIndex
Use CTI API	true
Softphone Height	450
Softphone Width	300
Salesforce Compatibility Mode	Classic_and_Lightning

Dialing Options

Outside Prefix	9
Long Distance Prefix	1
International Prefix	01

Call Center Users Manage Call Center Users

Call Center Users by Profile

Total	0
-------	---

Note: The **Create Call Center** option will be disabled during upgrades. It will be only available when the application is installed for the first time.

After the call center is created you can set up dispositions. This is an optional step and can be skipped if the **Subject** field in the activity is not used or the default values suffice the use case for your organization.

Also, you can configure to access call recordings from the logged call activity.

3. **Assign users to Call Center & Reporting:** Now is the time to assign the Office@Hand CTI application to the users in your organization. You can search and assign available users to the Office@Hand CTI Application.

✓ 3 **Assign Users to Call Center and Reporting**

In this Step you will add users to the Call Center as well as assign users to the Cloud Phone Report folder.

Assign Users to Call Center

Using the feature below select the users you wish to add to the RingCentral call center. You can also remove users from the call center with this feature.

Search Users

Available Members

Integration User
Security User

Selected Members

Kumar S

Now you are all set, and your end users will be able to start using the application. You can continue with the additional configurations as required for the organization.

You can enable users to access call reports by following the steps in **Launch Salesforce Reports**.

Assign Cloud Phone Report Folder

Here you can launch into the specific Salesforce Setup pages for assigning users to the Cloud Phone Report folder. You can also open the Setup Guide Window to get step by step instructions and screenshots for completing this RingCentral setup step.

4. **Add Phone to Apps:** With this step you can learn how to add Office@Hand to Lightning Apps as well as to the Utility Bar. Click on **Launch Salesforce Setup** to open the relevant section in Salesforce Setup. You can access the detailed instructions by clicking on **Open Setup Guide Window**.

✓ 4 **Add Phone to Apps**

With this step you can learn how to add RingCentral to Lightning Apps as well as to the Utility Bar.

You can add Open CTI Softphone to any of your Lightning Apps. This way the Softphone will display in the Utility Bar of those selected Lightning Apps. This feature enhances the user experience and overall productivity

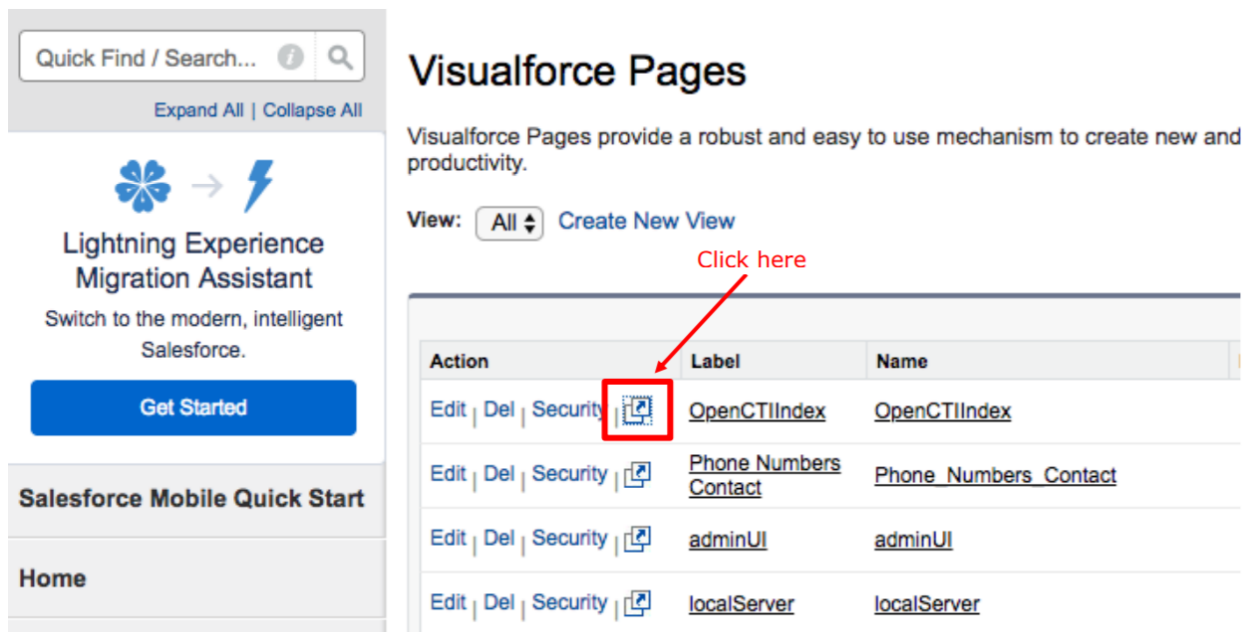
Steps 5 through 7 of the wizard walks you to enable additional settings such as Mobile experience, Analytics, configuring softphone layout, and Admin settings for Office@Hand app.



Steps for setup and configurations for upgrade to new version

If you have already installed Office@Hand for Salesforce in the past and you are upgrading to the latest version of the integration please follow the steps below.


Step 2: Configure the Call Center

Step 2.1 Navigate to **Setup > Visualforce Pages** and click the **Preview** icon next to the **OpenCTIIndex** page.



Quick Find / Search...  

Expand All | Collapse All


Lightning Experience Migration Assistant
Switch to the modern, intelligent Salesforce.
[Get Started](#)





Salesforce Mobile Quick Start

Home

Visualforce Pages

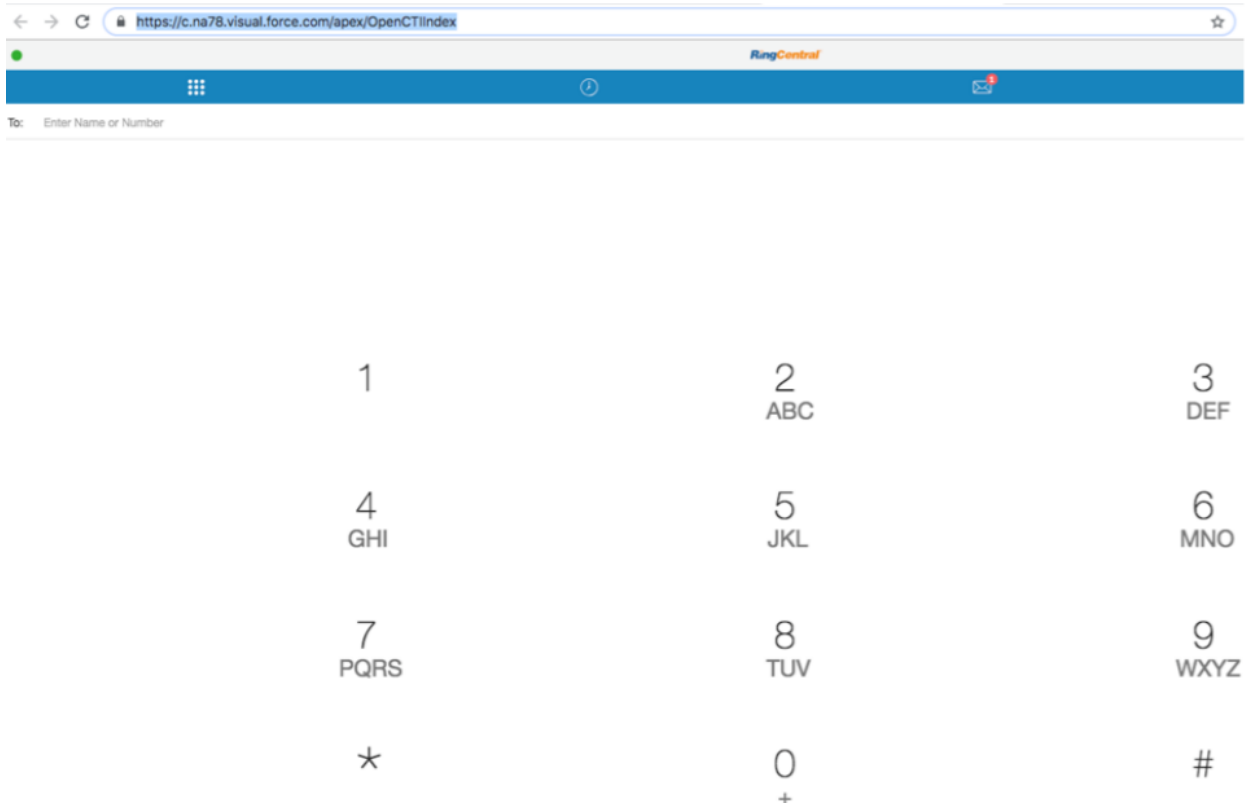
Visualforce Pages provide a robust and easy to use mechanism to create new and productivity.

View: All [Create New View](#)

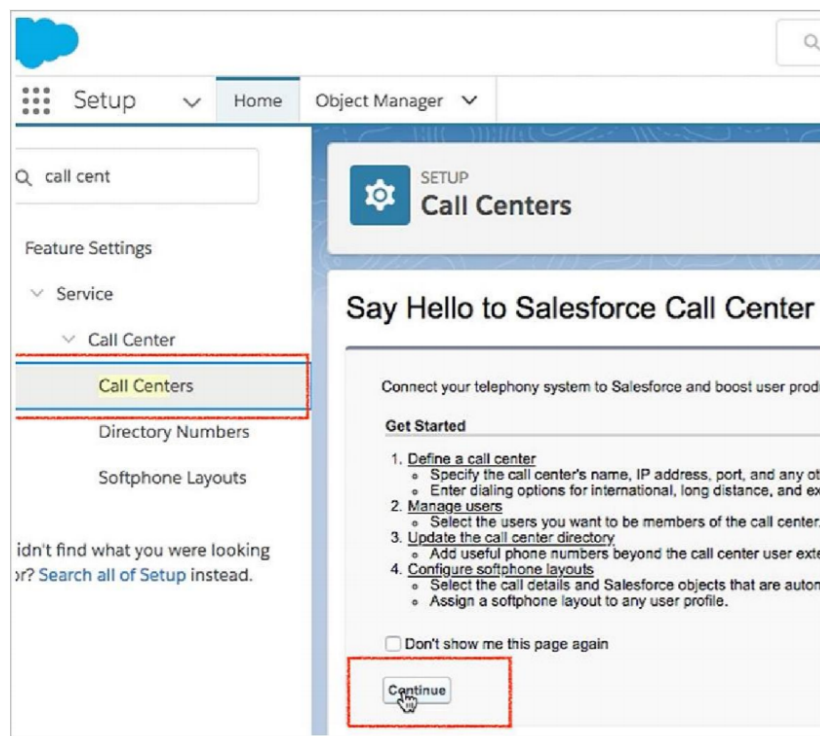
Action	Label	Name
Edit Del Security 	OpenCTIIndex	OpenCTIIndex
Edit Del Security 	Phone Numbers Contact	Phone Numbers Contact
Edit Del Security 	adminUI	adminUI
Edit Del Security 	localServer	localServer

After the page opens in a new tab or window, copy its URL. For example, the full URL is:

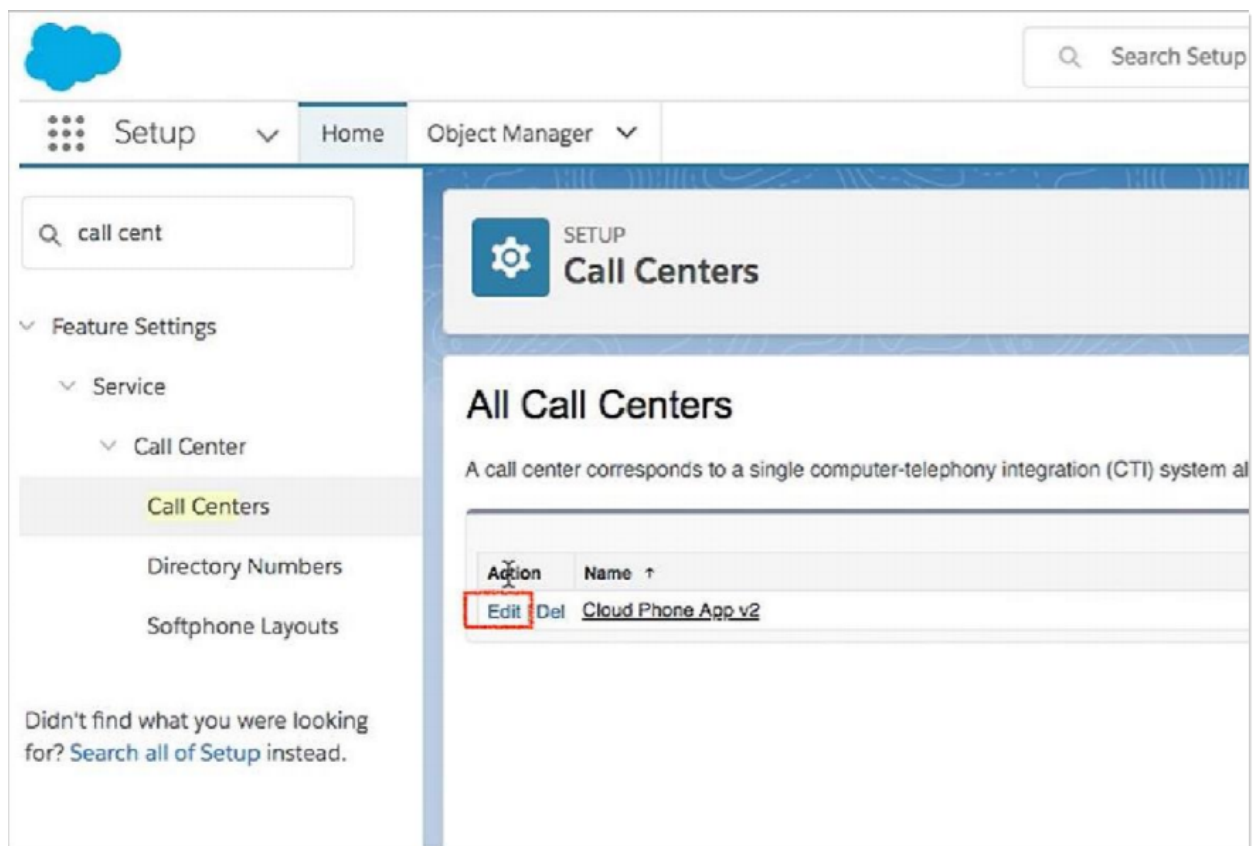
<https://c.na78.visual.force.com/apex/OpenCTIIndex>. Close the tab and return to **Setup Home > Call Centers** and click **Continue**.



Step 2.2 Paste the copied URL in the call center.



Select the call center **Cloud Phone App** and click **Edit**.



Note: If there is no call center, refer to the Troubleshooting section for instructions on manually creating the Call Center.

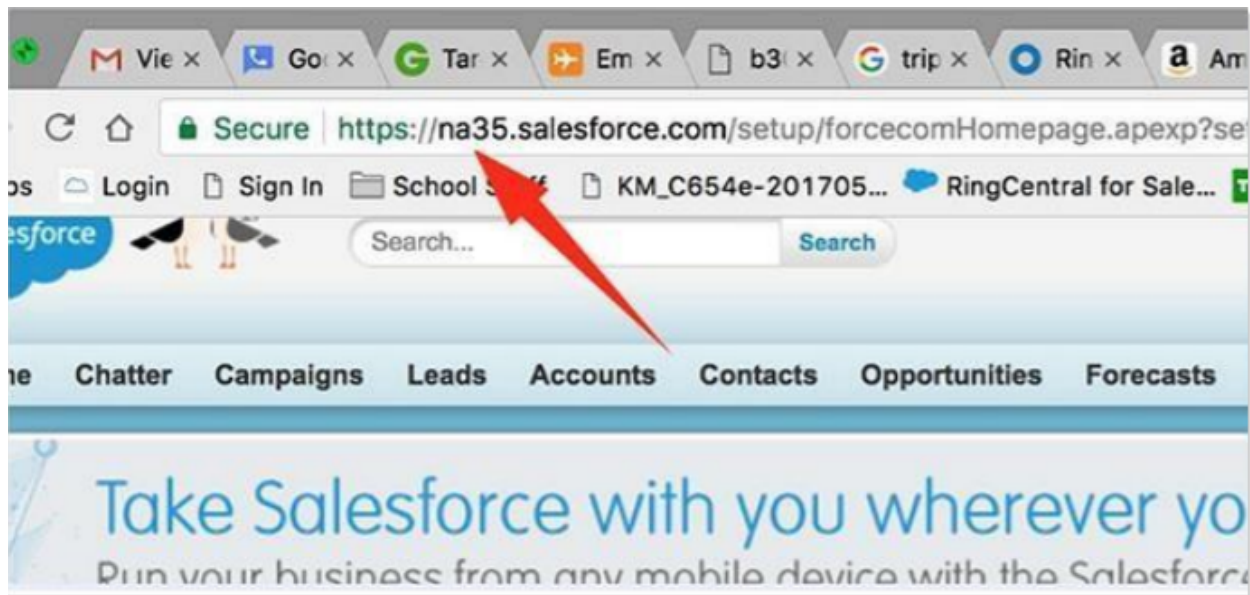
Paste the URL from **OpenCTIIndex** page to **CTI Adapter URL**, then click **Save**.

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The 'Setup' menu is expanded, showing 'Feature Settings', 'Service', 'Call Center', 'Call Centers', 'Directory Numbers', and 'Softphone Layouts'. The 'Call Centers' section is selected. The main content area is titled 'Call Center Edit' and 'Cloud Phone App v2'. It contains a 'General Information' section with fields for 'InternalName' (LightningCallCenterExp), 'Display Name' (Cloud Phone App v2), 'CTI Adapter URL' (https://rcsf.na35.visual), 'Use CTI API' (true), 'Softphone Height' (450), 'Softphone Width' (300), and 'Salesforce Compatibility Mode' (Classic_and_Lightning). A red box highlights the 'CTI Adapter URL' field, and a red arrow points to it from the text 'Paste the CTI Adapter URL here'. Below the 'General Information' section is the 'Dialing Options' section with fields for 'Outside Prefix' (9), 'Long Distance Prefix' (1), and 'International Prefix' (01). 'Save' and 'Cancel' buttons are present at the bottom of each section.

General Information	
InternalName	LightningCallCenterExp
Display Name	Cloud Phone App v2
CTI Adapter URL	https://rcsf.na35.visual
Use CTI API	true
Softphone Height	450
Softphone Width	300
Salesforce Compatibility Mode	Classic_and_Lightning

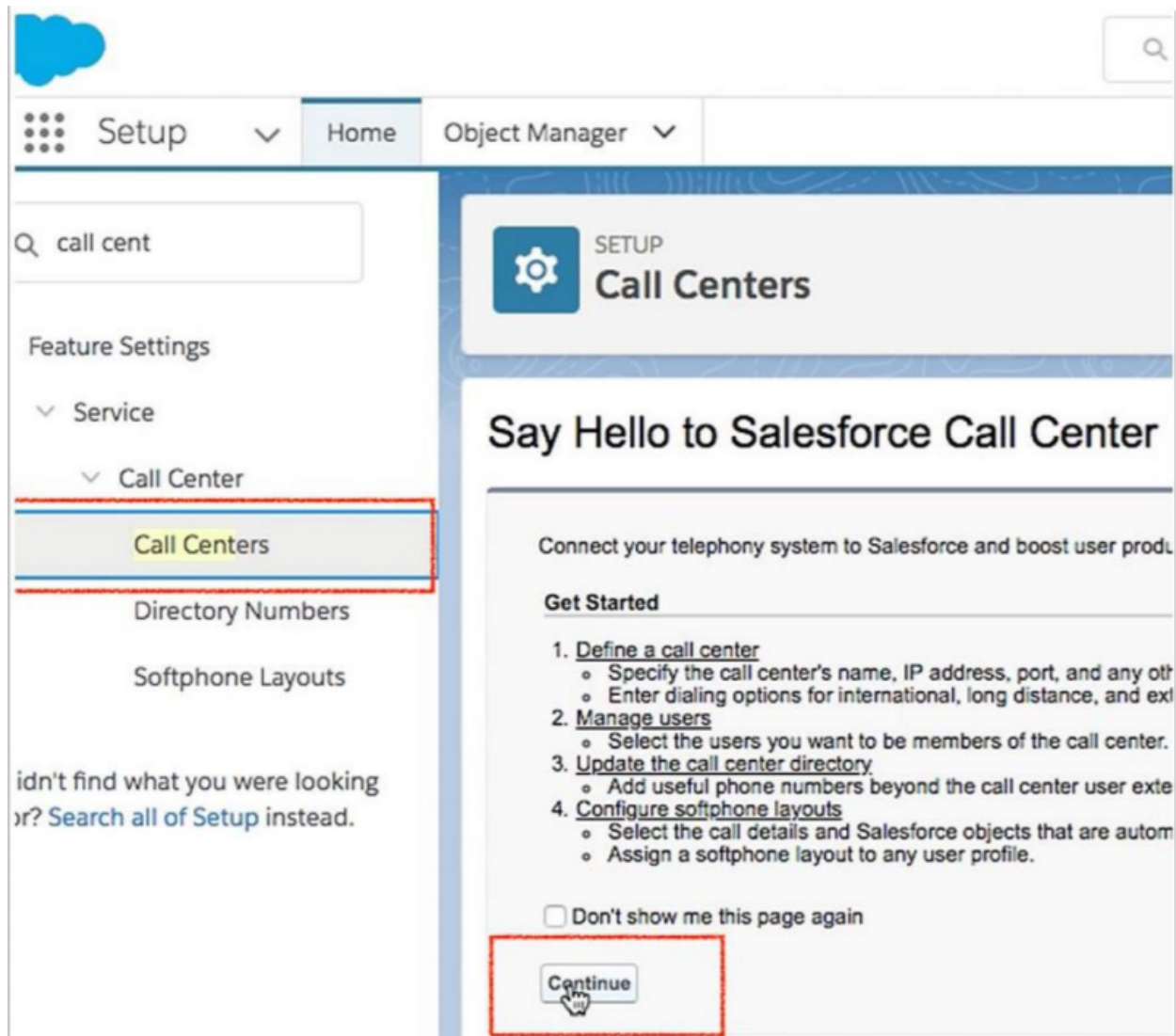
Dialing Options	
Outside Prefix	9
Long Distance Prefix	1
International Prefix	01

Note: In case you are not using a custom URL, follow the same steps and make sure the Salesforce POD# in Call Center URL (na35 in this example) matches with the Call Center where Salesforce Org resides. Your Salesforce POD# is specified in the browser address bar after you log in to Salesforce.



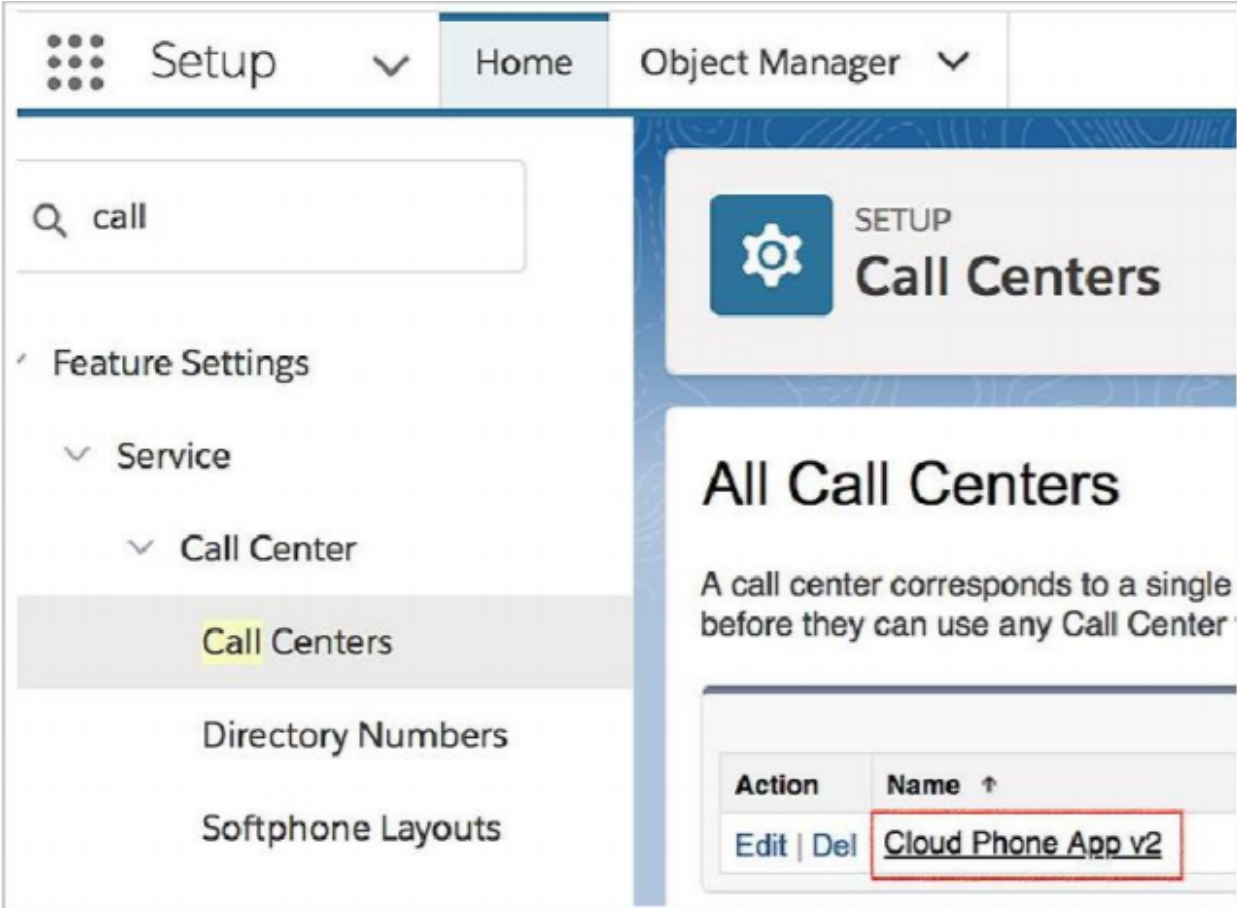
Step 3: Add Users to the Call Center

Navigate to **Setup Home > Call Centers** and click **Continue**.



Select the call center and click on **Cloud Phone App v2**.

Note: The name could be different, for example, **Cloud Phone App**, depending on the Salesforce.

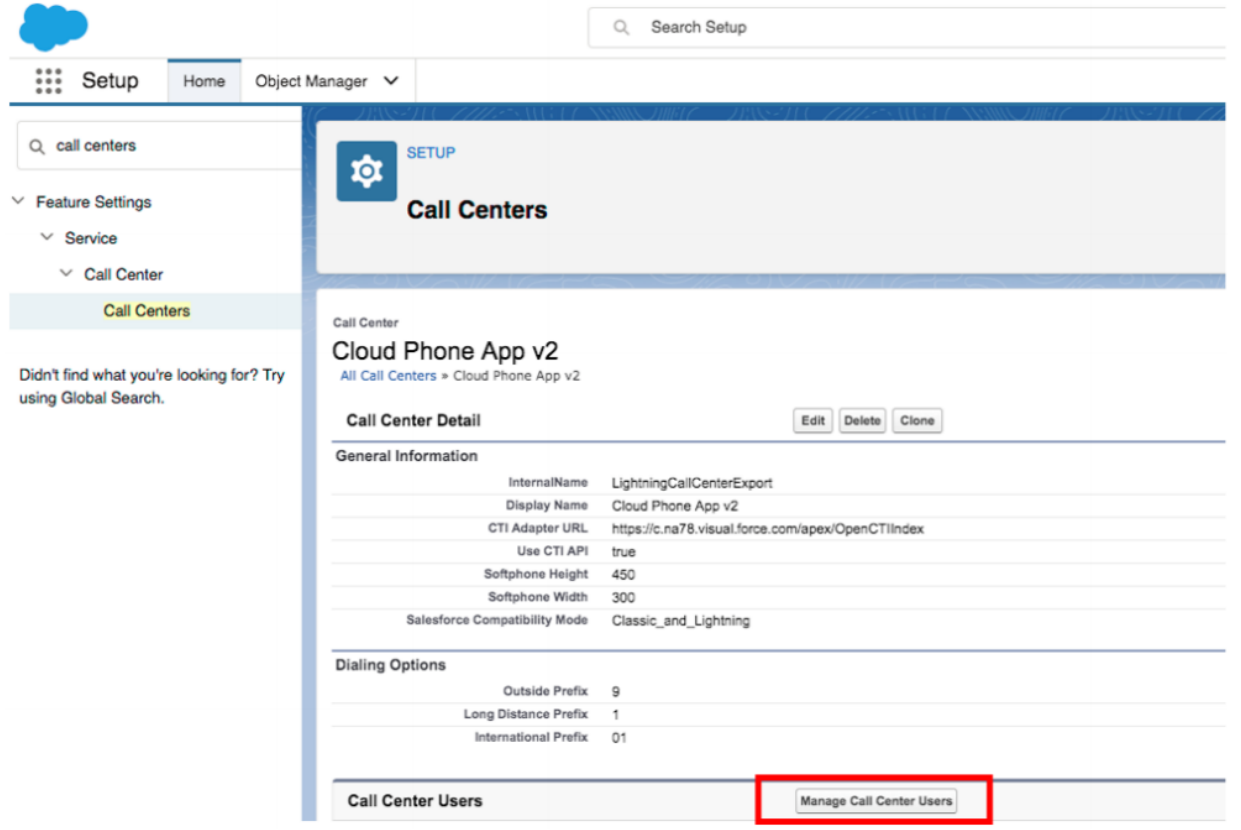


The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar, and tabs for Home and Object Manager. The left sidebar contains a search bar with the text 'call' and a list of feature settings: Feature Settings, Service, Call Center, Call Centers (highlighted), Directory Numbers, and Softphone Layouts. The main content area displays the 'SETUP Call Centers' header and the 'All Call Centers' section. Below the header, there is a description: 'A call center corresponds to a single before they can use any Call Center'. A table lists the call centers with columns for Action and Name. The table contains one entry: 'Cloud Phone App v2', which is highlighted with a red box.

Action	Name ↑
Edit Del	Cloud Phone App v2

Upon clicking **Cloud Phone App v2**, you will see the Call Center details. It is not necessary to edit this Call Center definition. From here, you can add users to this Call Center using the **Manage Call Center Users** button, which opens the **Manage Users** screen.

Note: If your users are added to another call center already, remove them first from that call center before you try to add them in the Cloud Phone.



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "call centers" and a list of navigation items: Feature Settings, Service, Call Center, and Call Centers (highlighted). The main content area is titled "Call Centers" and shows the details for "Cloud Phone App v2". The "Call Center Detail" section includes buttons for Edit, Delete, and Clone. Below this is the "General Information" section with fields for InternalName, Display Name, CTI Adapter URL, Use CTI API, Softphone Height, Softphone Width, and Salesforce Compatibility Mode. The "Dialing Options" section includes fields for Outside Prefix, Long Distance Prefix, and International Prefix. At the bottom, the "Call Center Users" section has a red box around the "Manage Call Center Users" button.

Setup

Search Setup

Setup

Home

Object Manager

call centers

Feature Settings

Service

Call Center

Call Centers

Didn't find what you're looking for? Try using Global Search.

SETUP

Call Centers

Call Center

Cloud Phone App v2

All Call Centers » Cloud Phone App v2

Call Center Detail

Edit Delete Clone

General Information

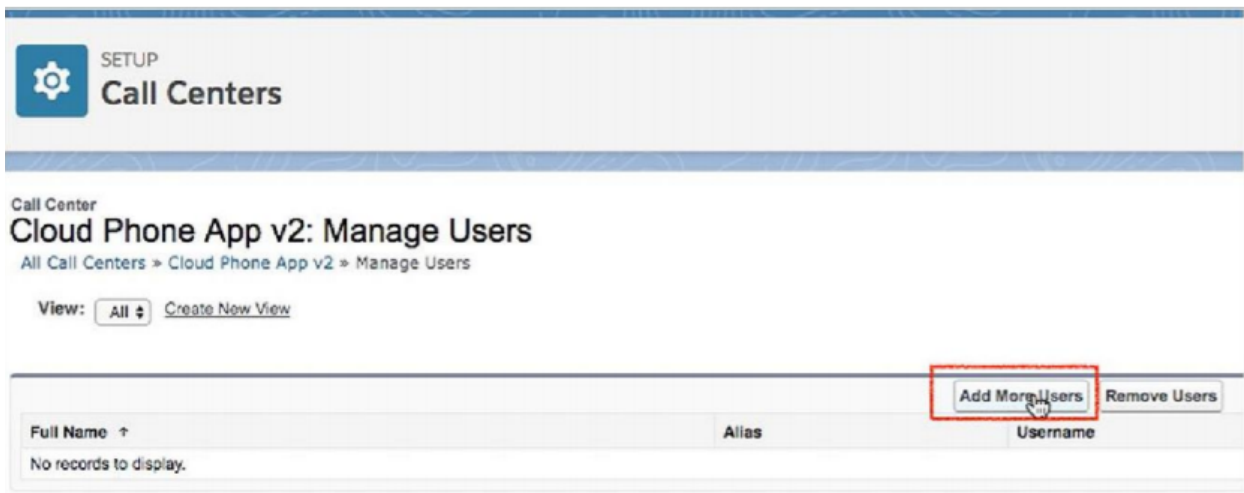
InternalName	LightningCallCenterExport
Display Name	Cloud Phone App v2
CTI Adapter URL	https://c.na78.visual.force.com/apex/OpenCTIIndex
Use CTI API	true
Softphone Height	450
Softphone Width	300
Salesforce Compatibility Mode	Classic_and_Lightning

Dialing Options

Outside Prefix	9
Long Distance Prefix	1
International Prefix	01

Call Center Users

Manage Call Center Users



The screenshot shows the Salesforce Setup interface for the "Manage Users" screen of "Cloud Phone App v2". The left sidebar has a search bar and navigation items: Feature Settings, Service, Call Center, and Call Centers (highlighted). The main content area is titled "Manage Users" and shows a table with columns for Full Name, Alias, and Username. The "Add More Users" button is highlighted with a red box.

SETUP

Call Centers

Call Center

Cloud Phone App v2: Manage Users


All Call Centers » Cloud Phone App v2 » Manage Users

View: All Create New View

Add More Users Remove Users

Full Name ↑	Alias	Username
No records to display.		

Select the users you wish to add to the call center.

 **SETUP**
Call Centers

Call Center
Cloud Phone App v2: Search for New Users
[All Call Centers](#) » [Cloud Phone App v2](#) » [Manage Users](#) » [Search for New Users](#)

Set the search criteria below and then click Search to find salesforce.com users who should be en

--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Filter By Additional Fields (Optional):

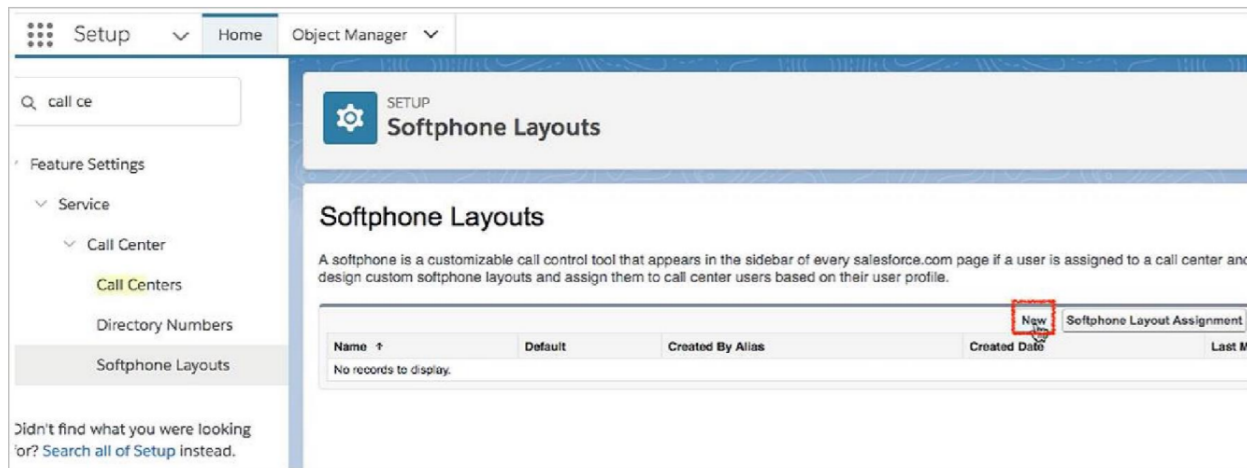
- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 5/14/2018
- For date/time fields, enter the value in following format: 5/14/2018 5:28 PM

Find

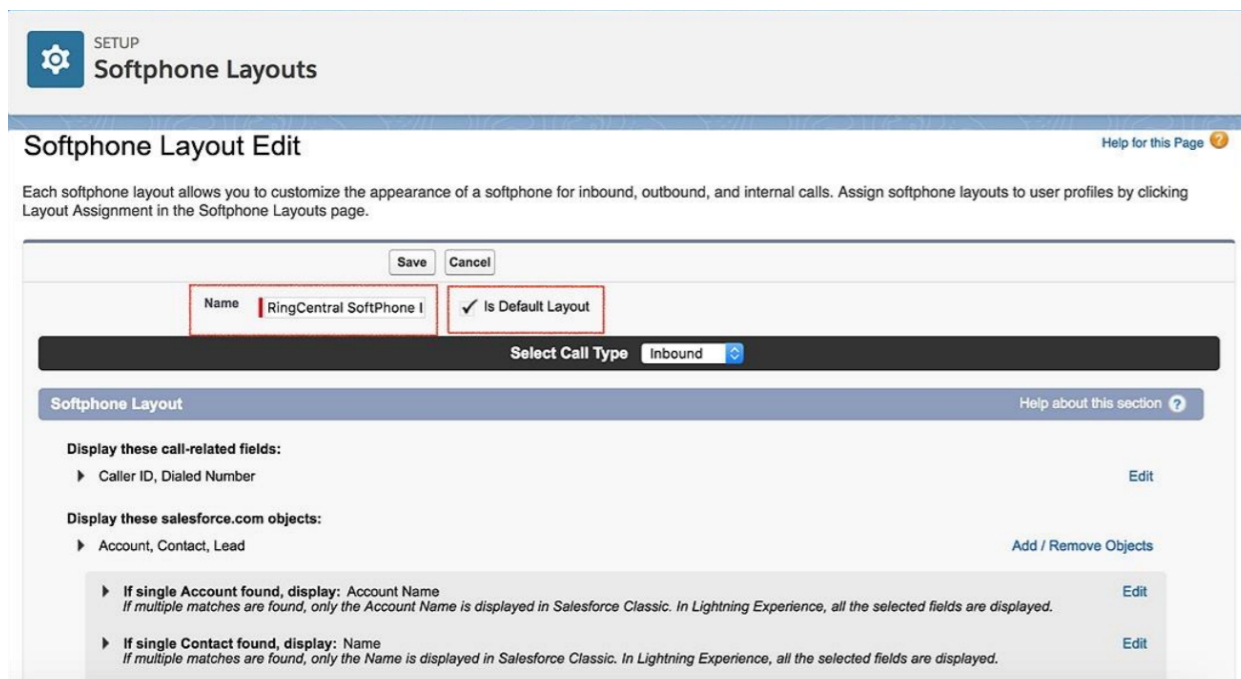
Setting up SoftPhone Layouts in Salesforce

Step 1: Set up a SoftPhone Layout

From the left-hand side menu, navigate to **Setup > Customize > Call Center > SoftPhone Layouts**, and then click the **New** button.



In the **Name** field, fill in **Office@Hand SoftPhone Layout** and select the **Is Default Layout** checkbox if you want this layout to be the default for all users.



Also, select the other Softphone layout options.

SETUP
Softphone Layouts

Softphone Layout Edit

Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layouts to user

Save Cancel

Name ☐ Is Default Layout

Select Call Type

Softphone Layout

Display these call-related fields:

- ▶ Caller ID, Dialed Number

Display these salesforce.com objects:

- ▶ Account, Contact, Lead

- ▶ If single Account found, display: Account Name
If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
- ▶ If single Contact found, display: Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
- ▶ If single Lead found, display: Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

Screen Pop Settings

- ▶ Screen pops open within: Existing browser window

In Screen Pop Settings:

- In the first set, **Screen pops open within**, choose whether you'd like screen pops to appear in a new window or to overwrite the existing Salesforce.com window when a new call arrives.
- For the second set, **No matching records**, if you'd like a new record to be created if there's no match on an inbound call, select the **Pop to new** option and from the dropdown select the appropriate object you would like to be created when there is an incoming call from a number which does not match any existing record.
- For the third set, **Single-matching record**, select the **Pop detail page** option.
- For the fourth set, **Multiple-matching records**, select the **Pop to search page**. Click the **Save** button at the top.

Click the **Save** button at the top.

The screenshot shows the 'Screen Pop Settings' configuration page. The page has a title bar with 'Screen Pop Settings' and a 'Help about this section' link. Below the title bar, there are four expandable sections, each with a 'Collapse' link on the right. The first section, 'Screen pops open within: New browser window or tab', has two radio buttons: 'Existing browser window' and 'New browser window or tab' (which is selected). The second section, 'No matching records: Pop to new Contact', has three radio buttons: 'Don't pop any screen', 'Pop to new' (selected), and 'Pop to Visualforce page'. The 'Pop to new' option has a dropdown menu showing 'Contact'. The third section, 'Single-matching record: Pop detail page', has three radio buttons: 'Don't pop any screen', 'Pop detail page' (selected), and 'Pop to Visualforce page'. The 'Pop to Visualforce page' option has a text input field and a Visualforce icon. The fourth section, 'Multiple-matching records: Pop to search page', has three radio buttons: 'Don't pop any screen', 'Pop to search page' (selected), and 'Pop to Visualforce page'. The 'Pop to Visualforce page' option has a text input field and a Visualforce icon.

Click **Save** to save the Softphone layout.

SETUP Softphone Layouts

Softphone Layout Edit

Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layout

Save **Cancel**

Name **RingCentral SoftPhone** ☒ Is Default Layout

Select Call Type **Inbound**

Softphone Layout

Display these call-related fields:

- ☒ Caller ID, Dialed Number

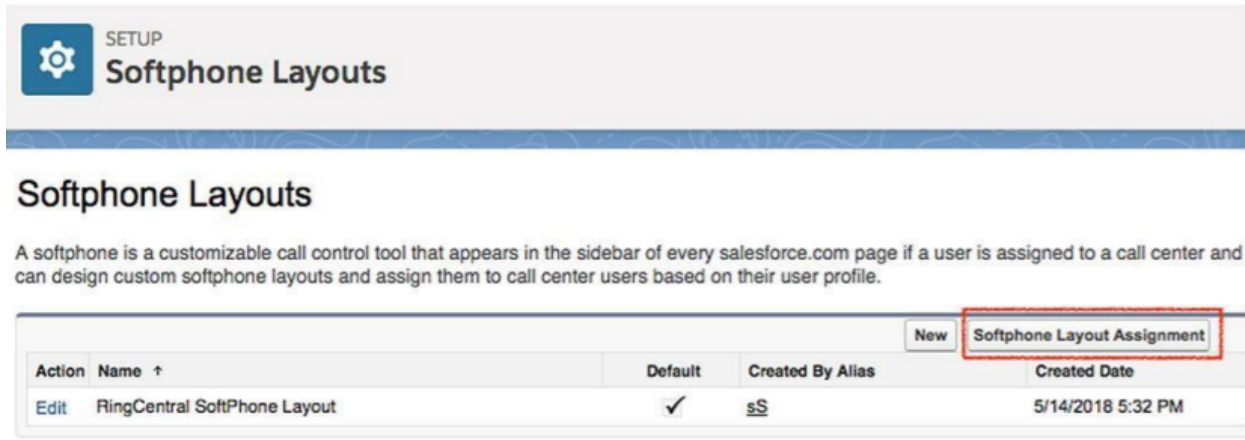
Display these salesforce.com objects:

- ☒ Account, Contact, Lead
 - ▶ **If single Account found, display:** Account Name
If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
 - ▶ **If single Contact found, display:** Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
 - ▶ **If single Lead found, display:** Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

Screen Pop Settings

Step 2: Assign the SoftPhone Layout to Users

Back on the **SoftPhone Layouts** page, click **SoftPhone Layout Assignment**.



Assign the **Softphone Layout** to the relevant profiles.



Note: According to the Open CTI Developer Guide

https://developer.salesforce.com/docs/atlas.enus.api_cti.meta/api_cti/sforce_api_cti_screenpop_lex.htm,
“Experience doesn’t support the softphone layout field Screen pops open within when the value is New browser window or tab. In Lightning Experience, the default Open CTI for Lightning value is Existing browser window.”

Enabling Office@Hand Meetings through Global Action

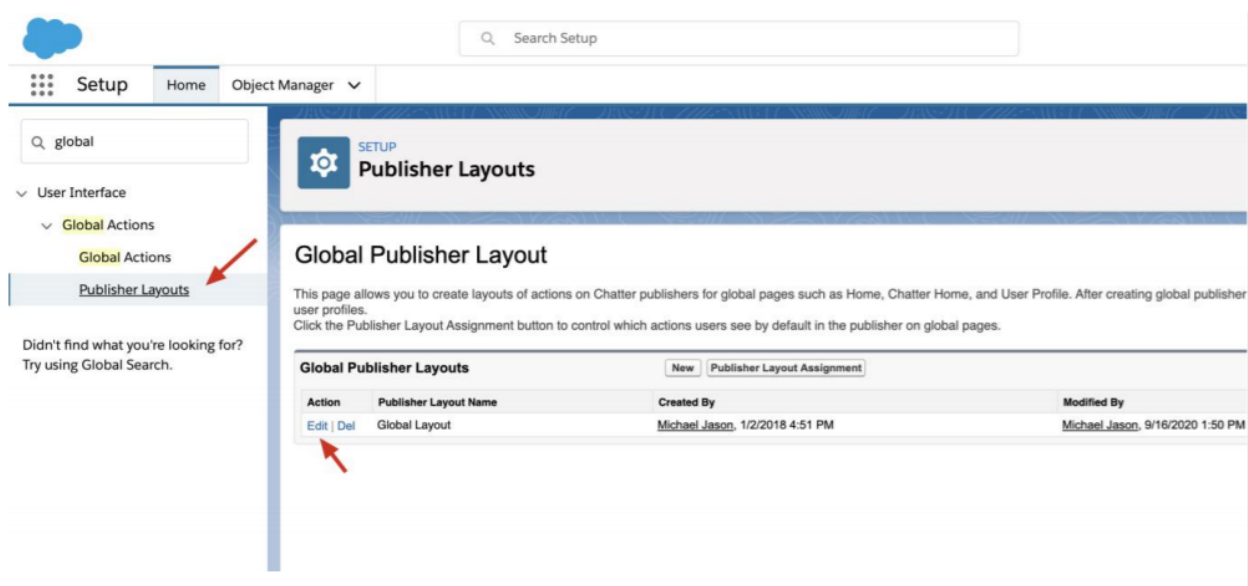
Setting up Global Action Layout in Salesforce

RingCentral Video features had been introduced from Office@Hand for Salesforce v6.9.0 to improve efficiency. Following these setups, end-users in your org could now start and schedule RingCentral Video meetings easily from Global Action.

Step 1: Navigate to Global Action Layout configurator

Navigate to **Setup > Home > User Interface > Global Actions > Publisher Layouts**.

Choose the Layout that you want to configure, then click **Edit**.



Step 2: Configure the layout

Click **Mobile and Lighting Actions**, drag the **Start RingCentral Video meeting** and **Schedule RingCentral Video meeting** to the Salesforce Mobile and Lighting Experience Actions list. Reorder the list as needed, then click **Save**.

The screenshot displays the Salesforce Setup interface for configuring Publisher Layouts. The left sidebar shows the navigation menu with 'Global Actions' and 'Publisher Layouts' highlighted. The main content area shows the 'Global Layout' configuration. A red arrow points to the 'Mobile & Lightning Actions' section in the left sidebar. Another red arrow points to the 'Schedule RingCentral...' button in the 'Quick Find' table. A third red arrow points to the 'New Opportunity' button in the 'Salesforce Mobile and Lightning Experience Actions' section.

Global Layout

Save Quick Save Cancel Undo Redo Layout Properties

Quick Find Mobile Action Name

Mobile Smart Actions	New Event	New Opportunity	Post
Email	New Account	New Group	New Task
File	New Case	New Lead	openCTI
Link	New Contact	New Note	Poll
Log a Call			

Global Publisher

Quick Actions in the Salesforce

Classic Publisher

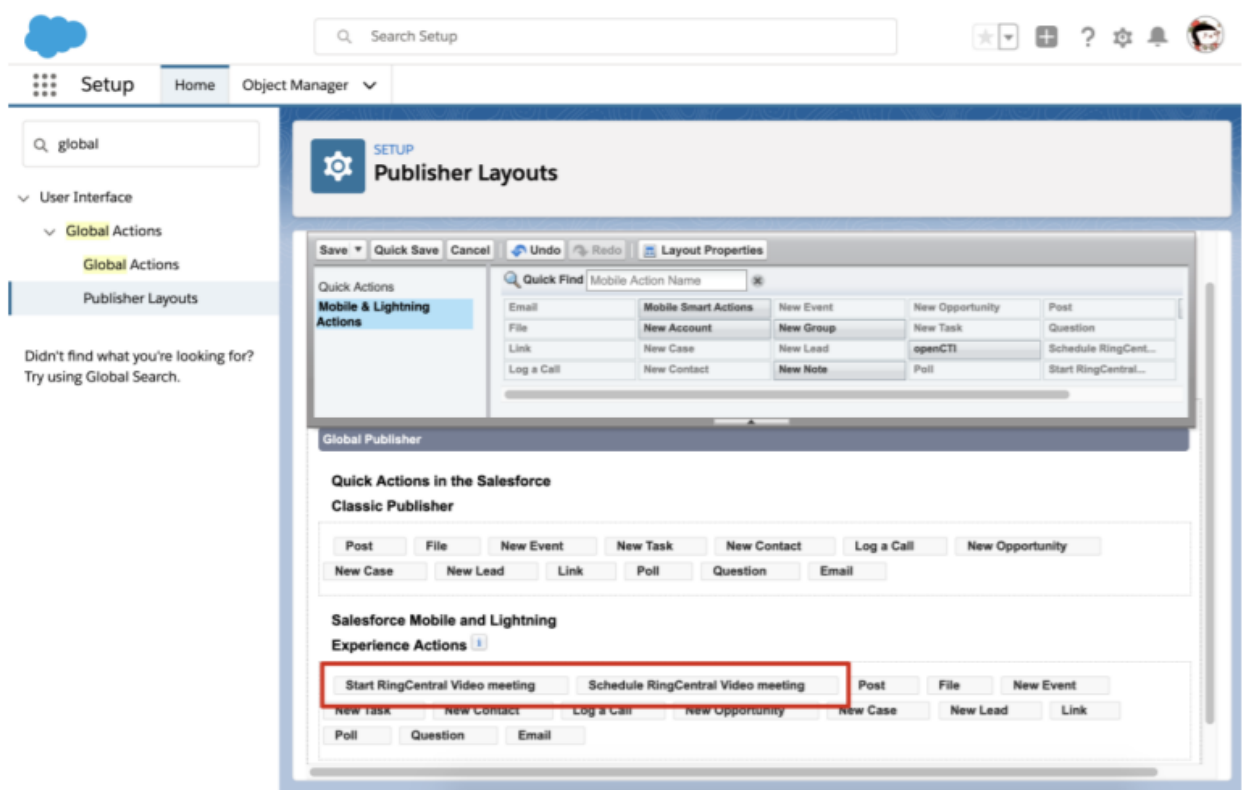
Post File New Event New Task New Contact Log a Call New Opportunity

New Case New Lead Link Poll Question Email

Salesforce Mobile and Lightning Experience Actions

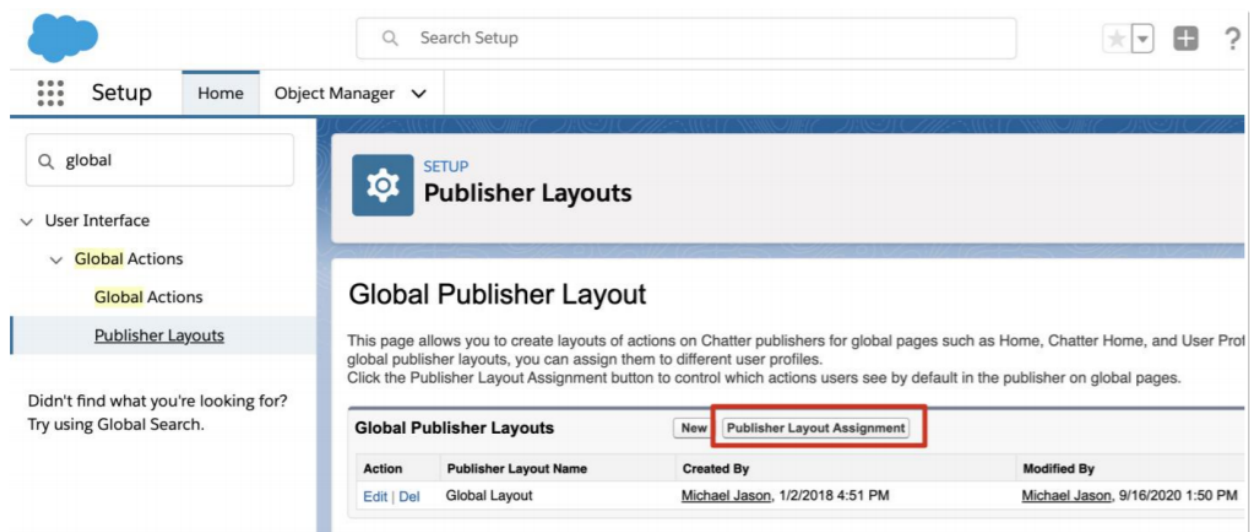
Post File New Event New Task New Contact Log a Call New Opportunity

New Case New Lead Link Poll Question Email



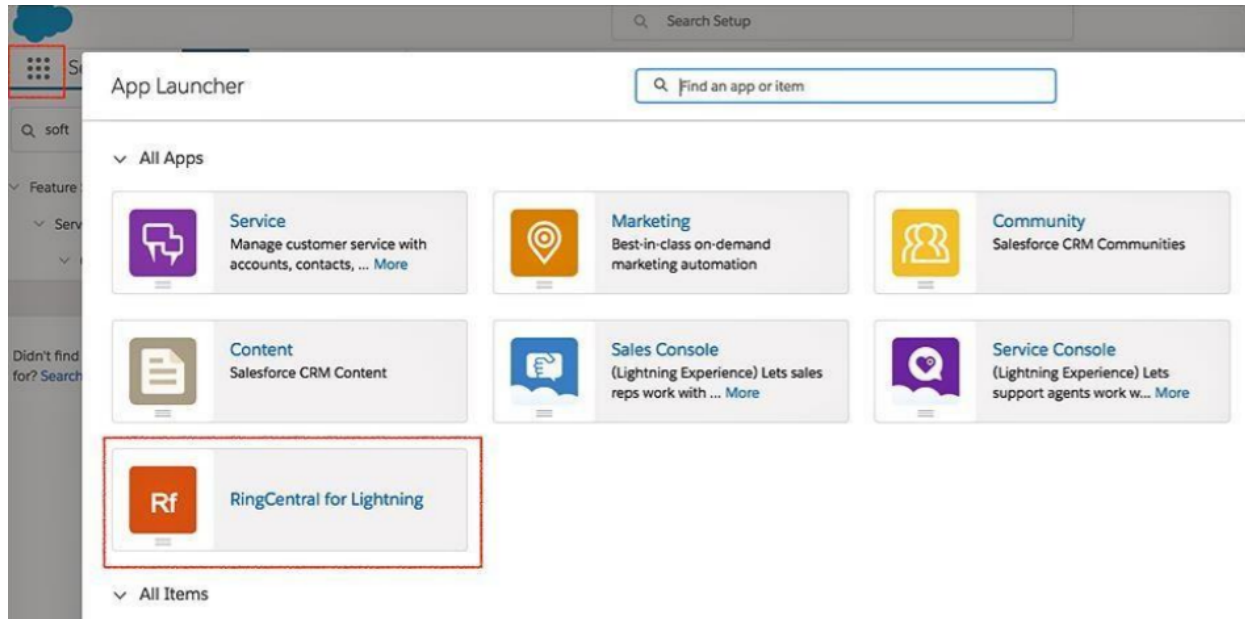
Step 3: Assign to roles

Go back to **Publisher Layouts**. If you are trying to assign a specific role with a specific layout, click the **Publisher Layout Assignment**, and configure it.

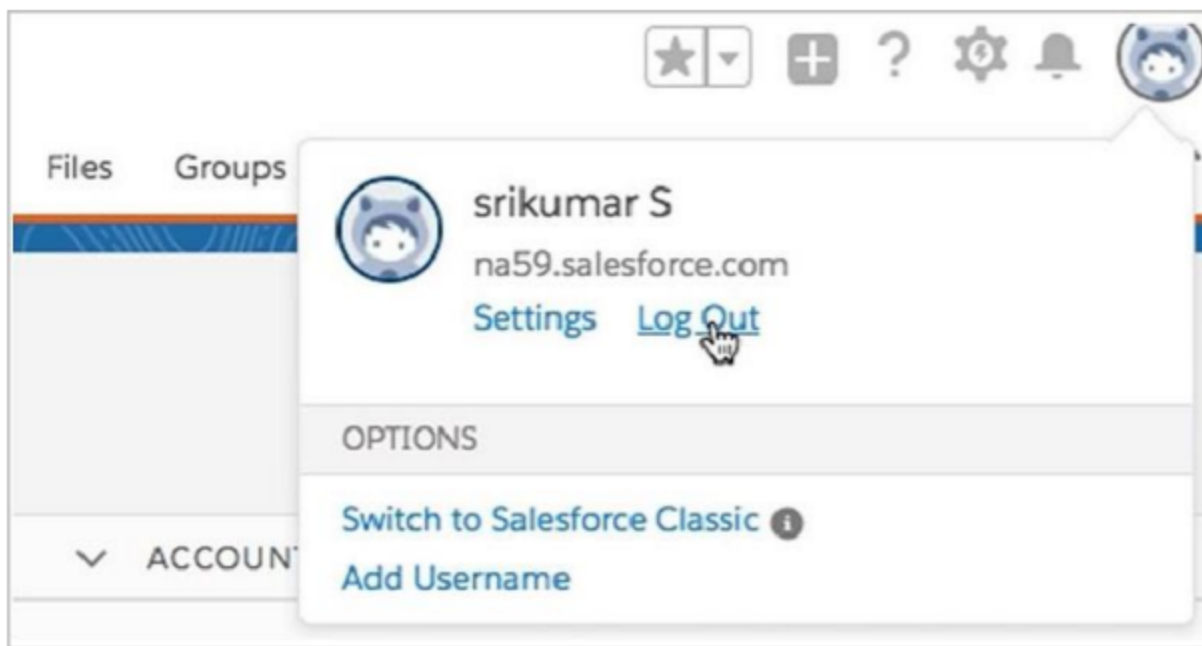


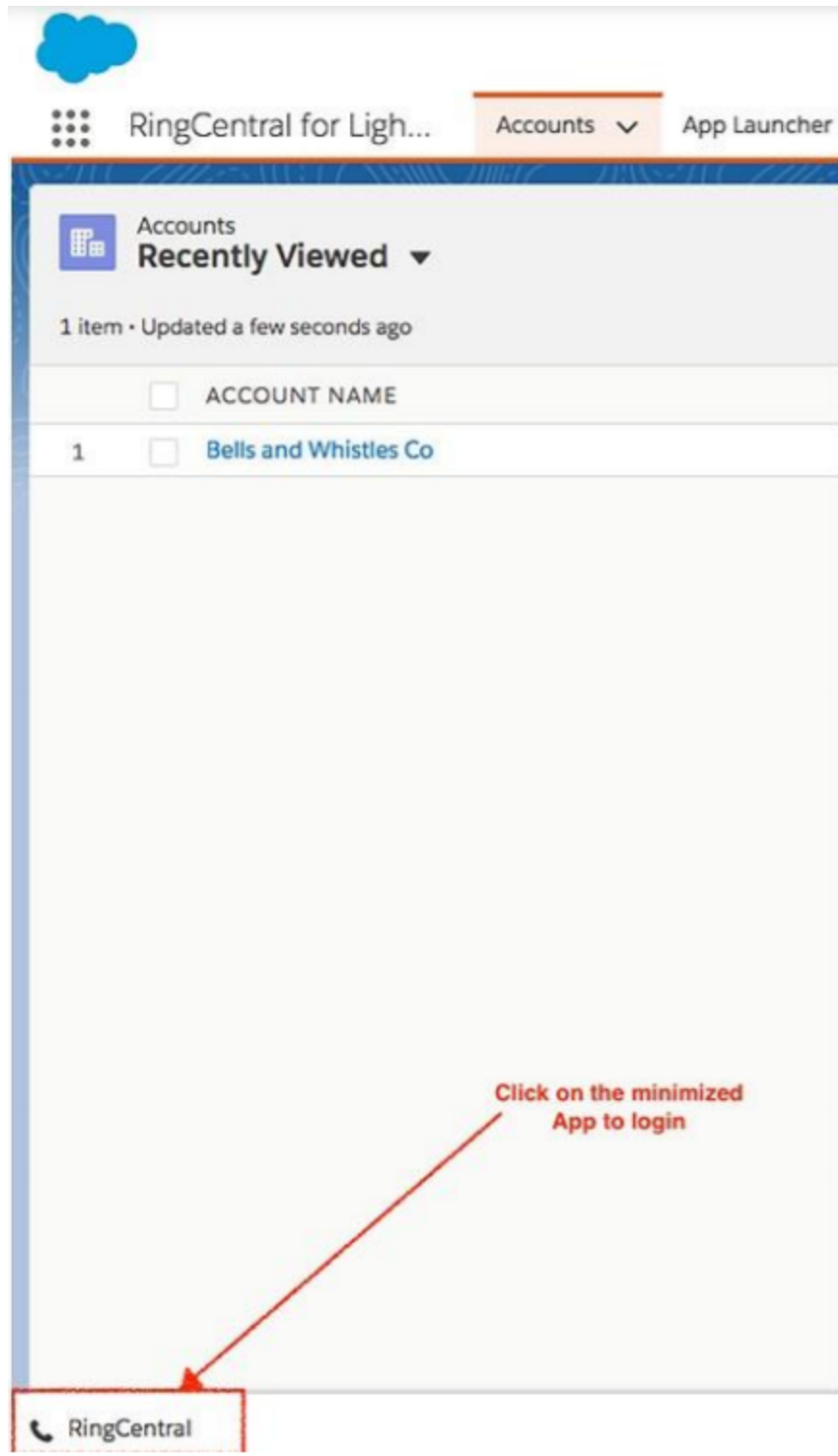
Launching app in Lightning View

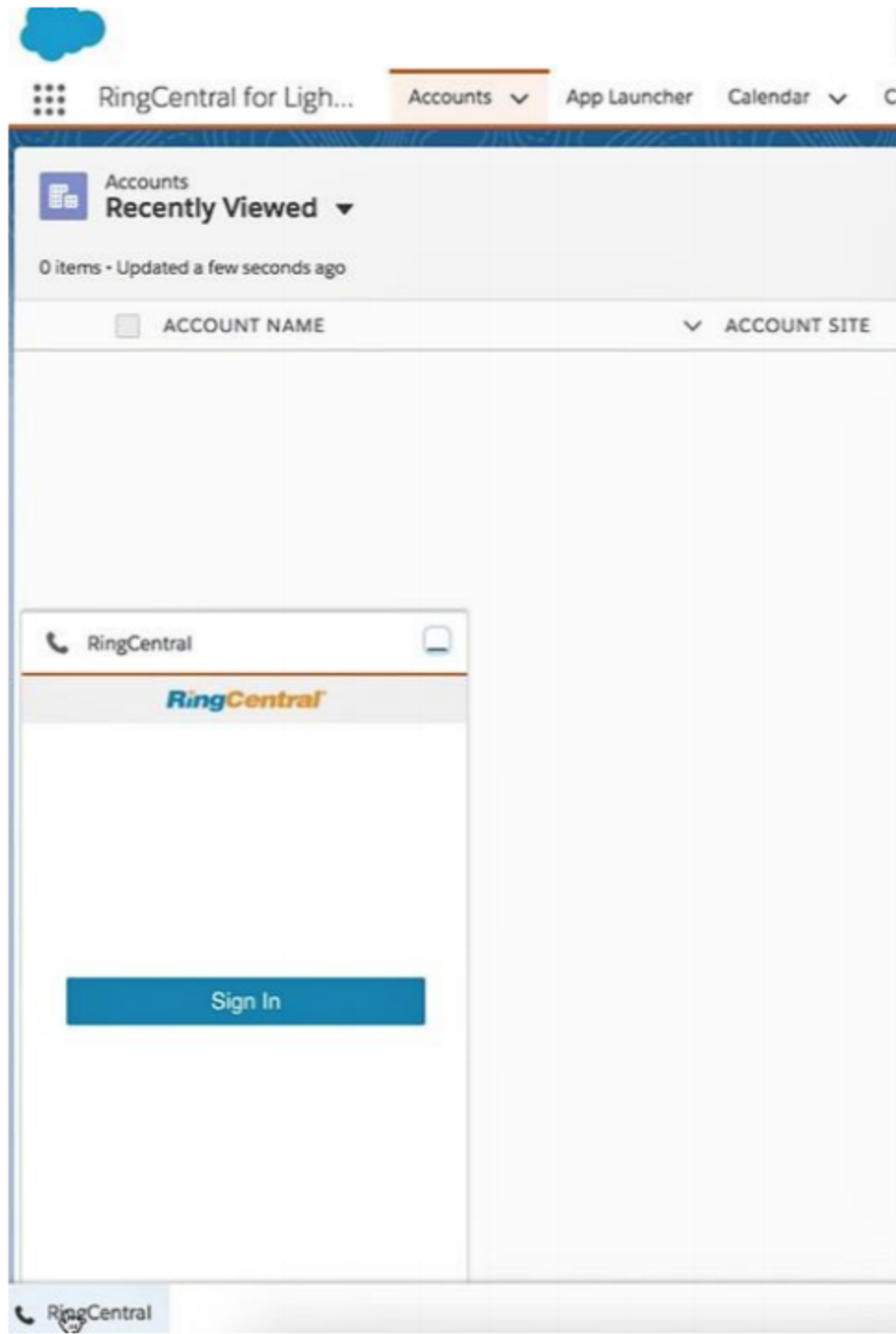
Now as your basic installation and configuration is complete, it's time to launch the Office@Hand for Lightning app. The app can be accessed from the App Launcher.



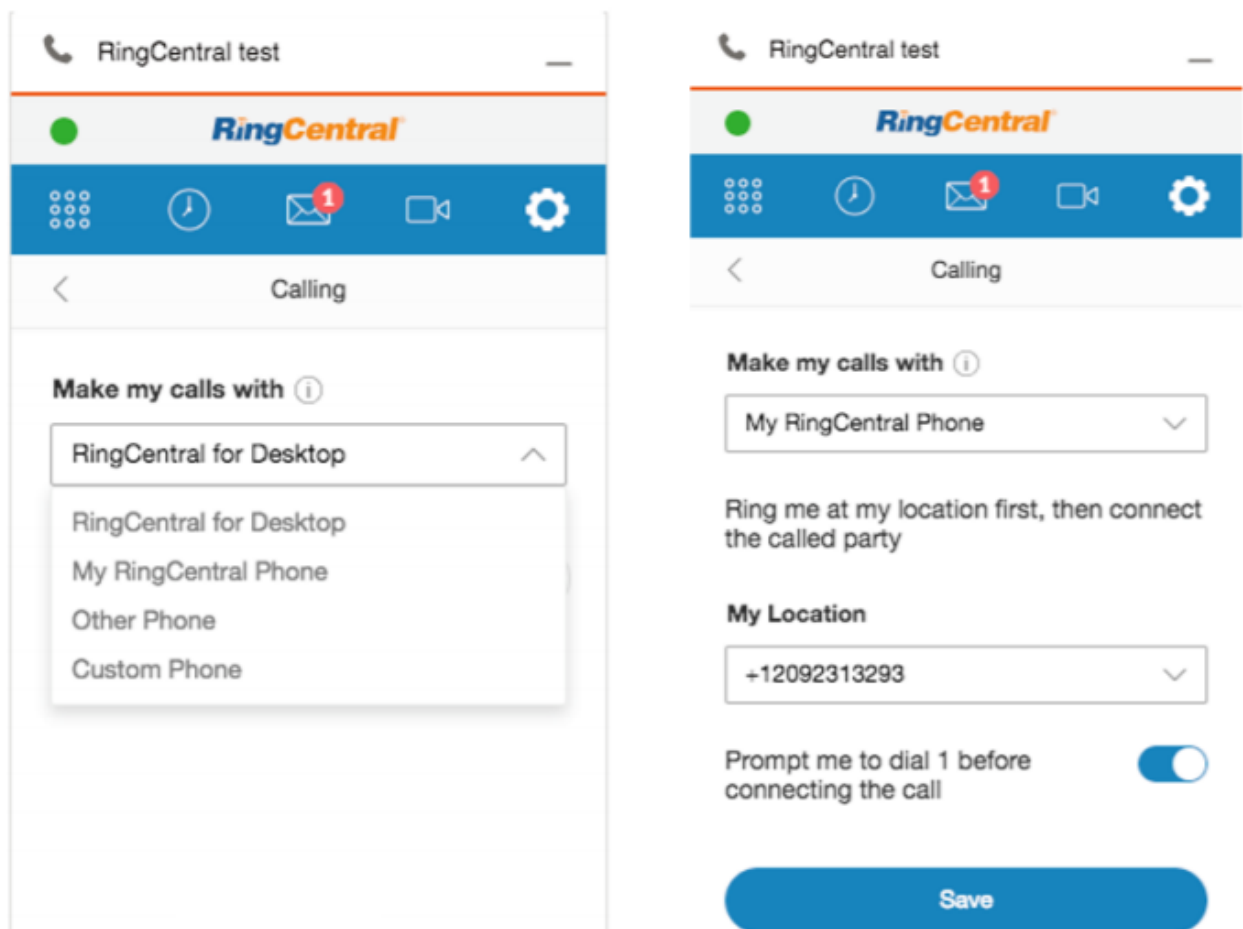
Before Launching the Office@Hand for Lightning app, log out and re-log in.







Click the button and you'll see the Office@Hand app. After signing in, configure the outbound dialing option in setup.




Add Open CTI Softphone to Your Lightning App

You can add CTI to any of your Lightning apps. Navigate to **All Setup > Apps > App Manager**.

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar contains navigation links: Setup Home, Lightning Experience, ADMINISTRATION (Users, Data, Email), PLATFORM TOOLS (Apps, App Manager, AppExchange Marketplace, Connected Apps, Installed Packages, Mobile Apps, Package Manager, Feature Settings, Einstein, Objects and Fields, Process Automation). The main content area is titled 'Lightning Experience App Manager' and displays a table of 13 items. The table has columns for App Name, Developer Name, Description, Last Modified, App Type, and a checkbox. The items listed are:

APP NAME	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED	APP TYPE	VE...
1 App Launcher	AppLauncher	App Launcher tabs	5/14/2018 5:03 PM	Classic	✓
2 Community	Community	Salesforce CRM Communities	5/14/2018 5:03 PM	Classic	✓
3 Content	Content	Salesforce CRM Content	5/14/2018 5:03 PM	Classic	✓
4 Marketing	Marketing	Best-in-class on-demand marketing automation	5/14/2018 5:03 PM	Classic	✓
5 Platform	Platform	The fundamental Lightning Platform	5/14/2018 5:03 PM	Classic	✓
6 RingCentral for Lightning	RingCentral		5/17/2018 11:45 AM	Lightning (Managed)	✓
7 Sales	Sales	The world's most popular sales force automation (SFA) solution	5/14/2018 5:03 PM	Classic	✓
8 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	5/17/2018 3:59 PM	Lightning	✓
9 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	5/14/2018 5:03 PM	Lightning	✓
10 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	5/14/2018 5:03 PM	Classic	✓
11 Service	Service	Manage customer service with accounts, contacts, cases, and more	5/14/2018 5:03 PM	Classic	✓
12 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service channels o...	5/14/2018 5:03 PM	Lightning	✓
13 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and manage content...	5/14/2018 5:03 PM	Classic	✓

Select the Lightning app you wish to add to the Office@hand app, and click **Edit**.

 **SETUP**
Lightning Experience App Manager

[New Lightning App](#) [New Connected App](#)

13 items • Sorted by App Name • Filtered by TabSet Type •

APP NAME ↑	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED ...	APP TYPE	VISIBLE IN LIGHT...
Community	Community	Salesforce CRM Com...	2/2/2017 6:43 PM	Classic	✓
Content	Content	Salesforce CRM Cont...	2/2/2017 6:43 PM	Classic	✓
Marketing	Marketing	Best-in-class on-dem...	2/2/2017 6:43 PM	Classic	✓
Platform	Platform	The fundamental For...	2/2/2017 6:43 PM	Classic	
RingCentral for Lightning	RingCentral		2/2/2017 6:54 PM	Lightning (Managed)	✓
Sales	Sales	The world's most pop..	2/2/2017 6:43 PM	Classic	
Sales	LightningSales	Manage your sales pr...	2/14/2017 7:21 PM	Lightning	✓
Sales Console	LightningSalesConsole	(Lightning Experienc...	2/14/2017 5:42 PM	Lightning	✓
Salesforce Chatter	Chatter	The Salesforce Chatt...	2/2/2017 6:43 PM	Classic	✓
Service	Service	Manage customer se...	2/2/2017 6:43 PM	Classic	✓

Open the **Utility Bar** tab and click **Add**.

The screenshot shows the Lightning App Builder interface for configuring the Utility Bar. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Sales'. The left sidebar lists 'APP SETTINGS' with sub-items: 'App Details & Branding', 'App Options', 'Utility Bar' (selected), 'Select Items', and 'Assign to User Profiles'. The main area is titled 'Utility Bar' with the description 'Give your users quick access to common productivity tools.' Below this, there is a section for 'Utility Bar Items' with an 'Add' button. A single item, 'Phone', is currently configured. The 'Phone' item has a 'Label' of 'Phone', an 'Icon' of a phone handset, a 'Panel Width' of 340, and a 'Panel Height' of 480. The 'Load in background when app opens' checkbox is checked. The 'Properties' section for the 'Phone' item shows 'Open CTI Softphone' with up/down arrows and a 'Remove' button. The 'Utility Item Properties' section includes fields for 'Label', 'Icon', 'Panel Width', 'Panel Height', and a checkbox for 'Load in background when app opens'.

Lightning App Builder | **App Settings** | **Pages** | **Sales**

APP SETTINGS

- App Details & Branding
- App Options
- Utility Bar**
- Select Items
- Assign to User Profiles

Utility Bar

Give your users quick access to common productivity tools.

Utility Bar Items [Add](#)

Phone

PROPERTIES
Open CTI Softphone

[↑](#) [↓](#) [Remove](#)

▼ Utility Item Properties

* Label ⓘ
Phone

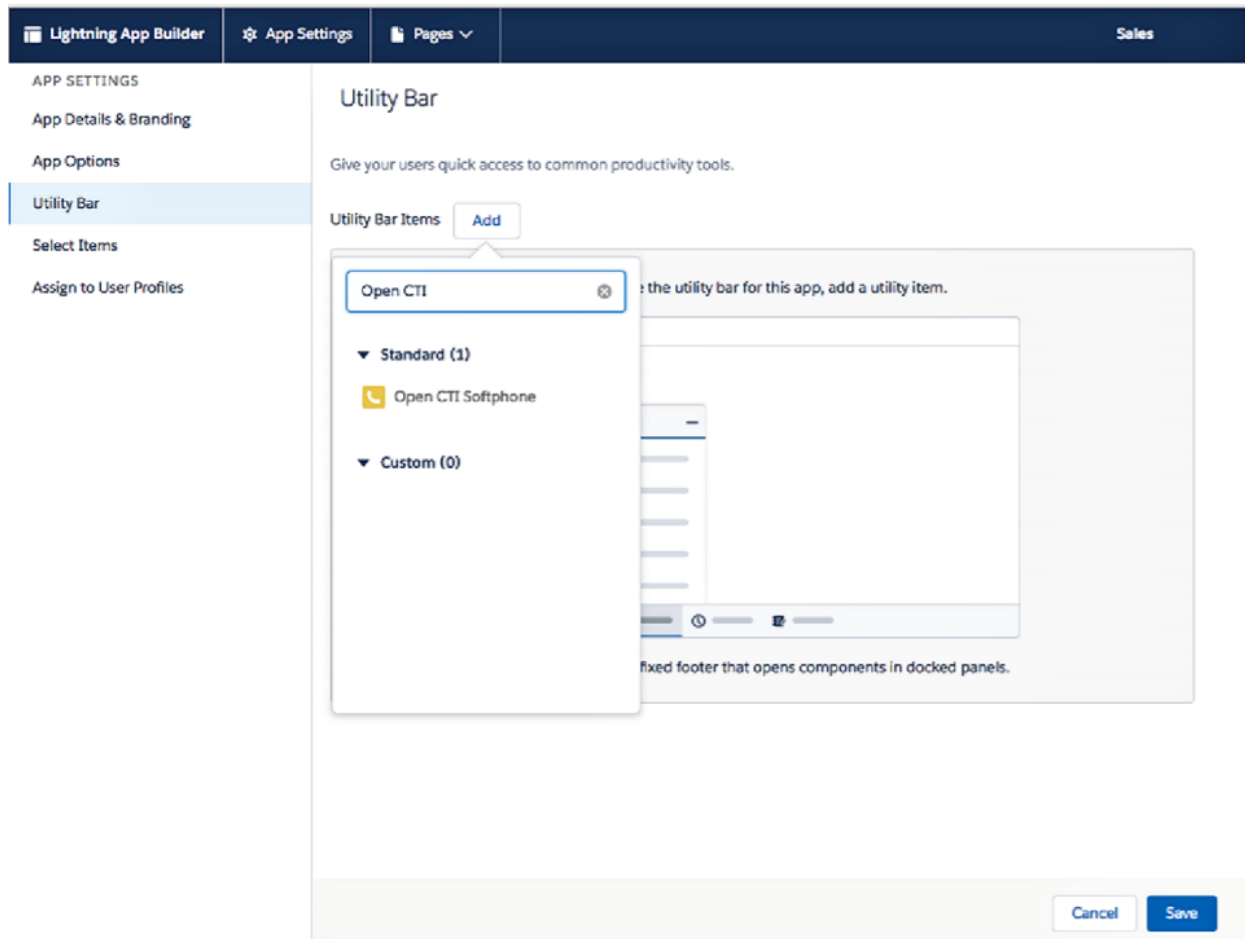
Icon ⓘ
 call X

Panel Width ⓘ
340

Panel Height ⓘ
480

☒ Load in background when app opens ⓘ

Select **Open CTI Softphone** from the available list and click it. Click **Save**, then click **Done**.



Launch the app from **App Launcher**, and you'll see the Office@Hand app in the **Utility Bar**.

The screenshot shows the Lightning App Builder interface for configuring the Utility Bar. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Sales'. The left sidebar lists 'APP SETTINGS' with sub-items: 'App Details & Branding', 'App Options', 'Utility Bar' (selected), 'Select Items', and 'Assign to User Profiles'. The main content area is titled 'Utility Bar' and includes the instruction 'Give your users quick access to common productivity tools.' Below this is a 'Utility Bar Items' section with an 'Add' button. A 'Phone' item is currently configured, showing a preview on the left and properties on the right. The properties include 'Open CTI Softphone', 'Label' (Phone), 'Icon' (call), 'Panel Width' (340), 'Panel Height' (480), and a checked option 'Load in background when app opens'. At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red rectangle.

Lightning App Builder | App Settings | Pages | Sales

APP SETTINGS


- App Details & Branding
- App Options
- Utility Bar**
- Select Items
- Assign to User Profiles

Utility Bar

Give your users quick access to common productivity tools.

Utility Bar Items [Add](#)

Phone



PROPERTIES

Open CTI Softphone

↑ ↓ Remove

▼ **Utility Item Properties**

* Label ?

Phone

Icon ?

call X

Panel Width ?

340

Panel Height ?

480

☒ Load in background when app opens ?

Cancel **Save**

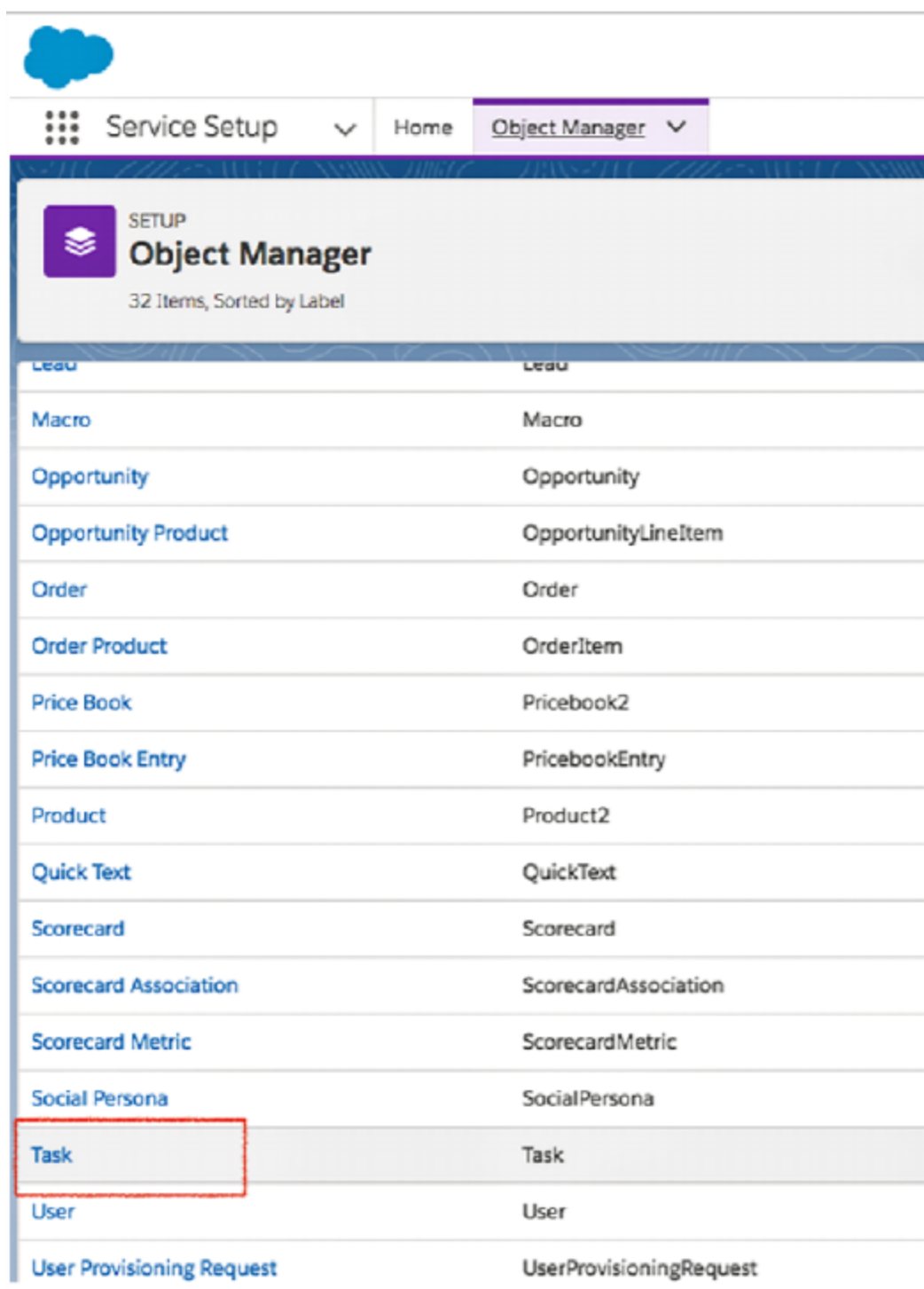
Setting up preset call dispositions

Office@Hand for Salesforce includes the capability to provide a list of preset call dispositions to your end users to make logging calls quick and easy. These dispositions appear in a dropdown list under the **Subject** area of the call log.

The image shows two side-by-side screenshots. The left screenshot is from the RingCentral mobile app, displaying a 'Log Call' dialog box. The dialog shows a call from 'Unknown (202) 759-9741' with a status of 'Hung up'. Below this, there is a 'Related To: [None]' dropdown and an 'Outbound to +12027599741' field. A list of preset call dispositions is shown: 'Test12342', 'Call', 'Email', 'Send Letter', 'Send Quote', and 'Other'. A 'Create Log' button is at the bottom. The right screenshot is from the Salesforce Lightning Setup page, specifically the 'Object Manager' section. The 'Object Manager' tab is highlighted in the top navigation bar. The main content area shows a list of 32 objects, sorted by label. The table has columns for 'LABEL', 'API NAME', and 'DESCRIPTION'.


LABEL	API NAME	DESCRIPTION
Account	Account	
Activity	Activity	
Asset	Asset	
Asset Relationship	AssetRelationship	
Campaign	Campaign	
Campaign Member	CampaignMember	
Case	Case	
Contact	Contact	
Content Version	ContentVersion	
Contract	Contract	
D&B Company	DandBCompany	
Duplicate Record Item	DuplicateRecordItem	
Duplicate Record Set	DuplicateRecordSet	
Email Message	EmailMessage	
Event	Event	
Lead	Lead	
Macro	Macro	

These preset dispositions are gathered from the **Subject** picklist on the Salesforce.com **Task** object. To edit these dispositions, **navigate to Setup > Object Manager > Activities > Tasks > Fields & Relationships > Subject**.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Service Setup', 'Home', and 'Object Manager'. The main header displays 'SETUP Object Manager' with a subtext '32 Items, Sorted by Label'. Below this is a table listing various objects. The 'Task' object is highlighted with a red box.

Lead	Lead
Macro	Macro
Opportunity	Opportunity
Opportunity Product	OpportunityLineItem
Order	Order
Order Product	OrderItem
Price Book	Pricebook2
Price Book Entry	PricebookEntry
Product	Product2
Quick Text	QuickText
Scorecard	Scorecard
Scorecard Association	ScorecardAssociation
Scorecard Metric	ScorecardMetric
Social Persona	SocialPersona
Task	Task
User	User
User Provisioning Request	UserProvisioningRequest

 **Task**

SETUP > OBJECT MANAGER

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Object Limits

Record Types

Triggers


Validation Rules

Fields & Relationships

22 Items, Sorted by Field Label

Created By	CreatedById
Due Date	ActivityDate
Email	Email
Last Modified By	LastModifiedById
Name	WhoId
Phone	Phone
Priority	Priority
Recurrence Interval	RecurrenceInterval
Related To	WhatId
Reminder Set	IsReminderSet
Repeat This Task	RecurrenceRegeneratedType
Status	Status
Subject	Subject

Adding new or editing picklist values here will instantly modify the dispositions available to users.

 **Task**

SETUP > OBJECT MANAGER

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Object Limits

Record Types

Triggers

Validation Rules

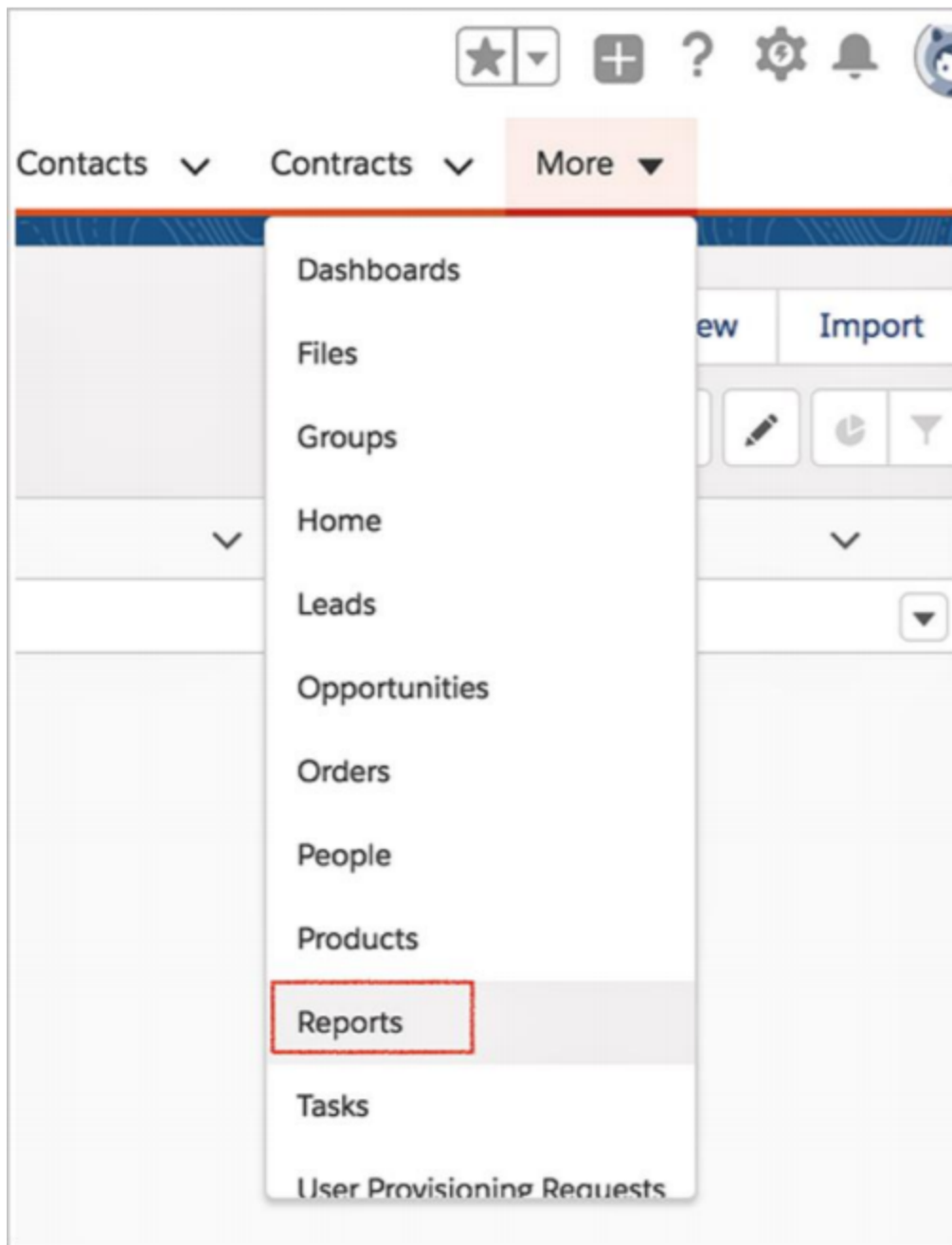
Fields & Relationships

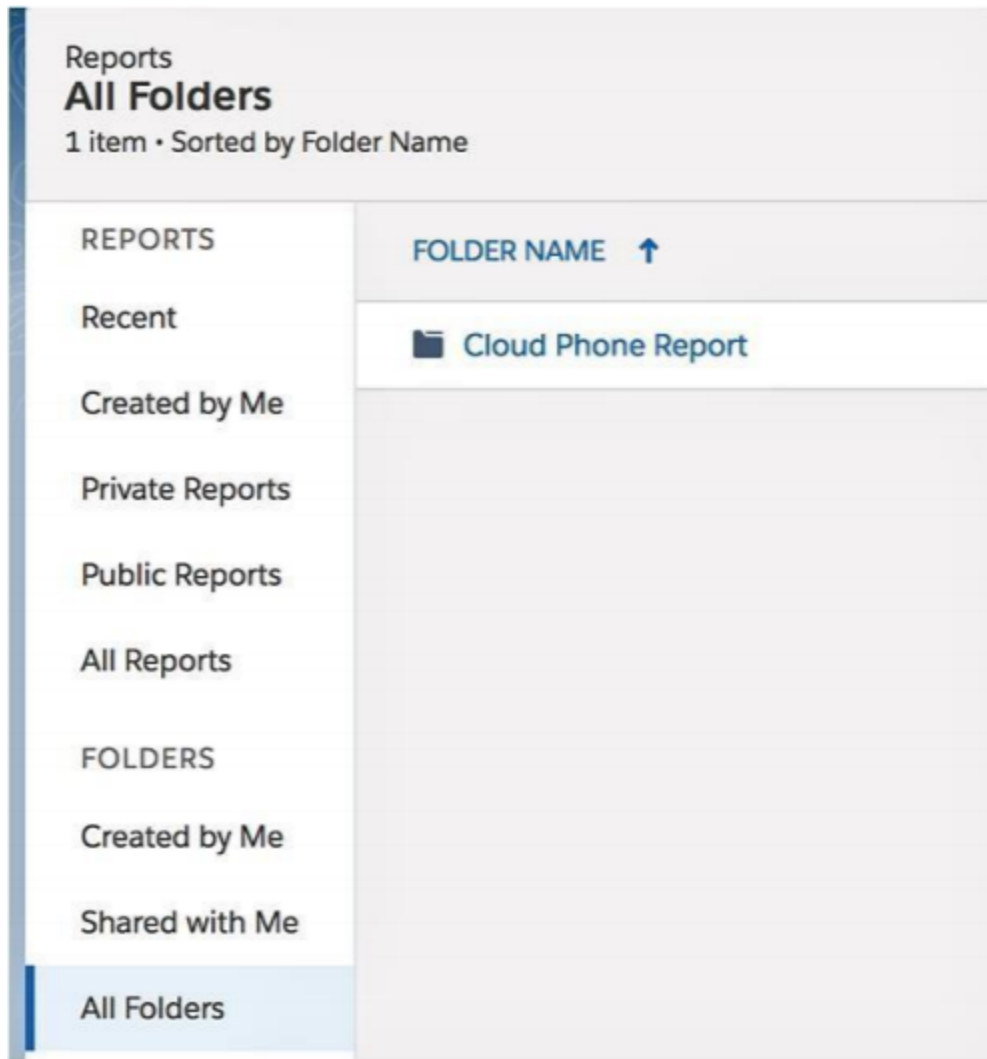
22 Items, Sorted by Field Label

Created By	CreatedById
Due Date	ActivityDate
Email	Email
Last Modified By	LastModifiedById
Name	WhoId
Phone	Phone
Priority	Priority
Recurrence Interval	RecurrenceInterval
Related To	WhatId
Reminder Set	IsReminderSet
Repeat This Task	RecurrenceRegeneratedType
Status	Status
Subject	Subject

Sharing Report folder with users

Navigate to the Reports tab in Salesforce. Find the **Cloud Phone Report** folder by clicking on **All Folders** on the left menu.

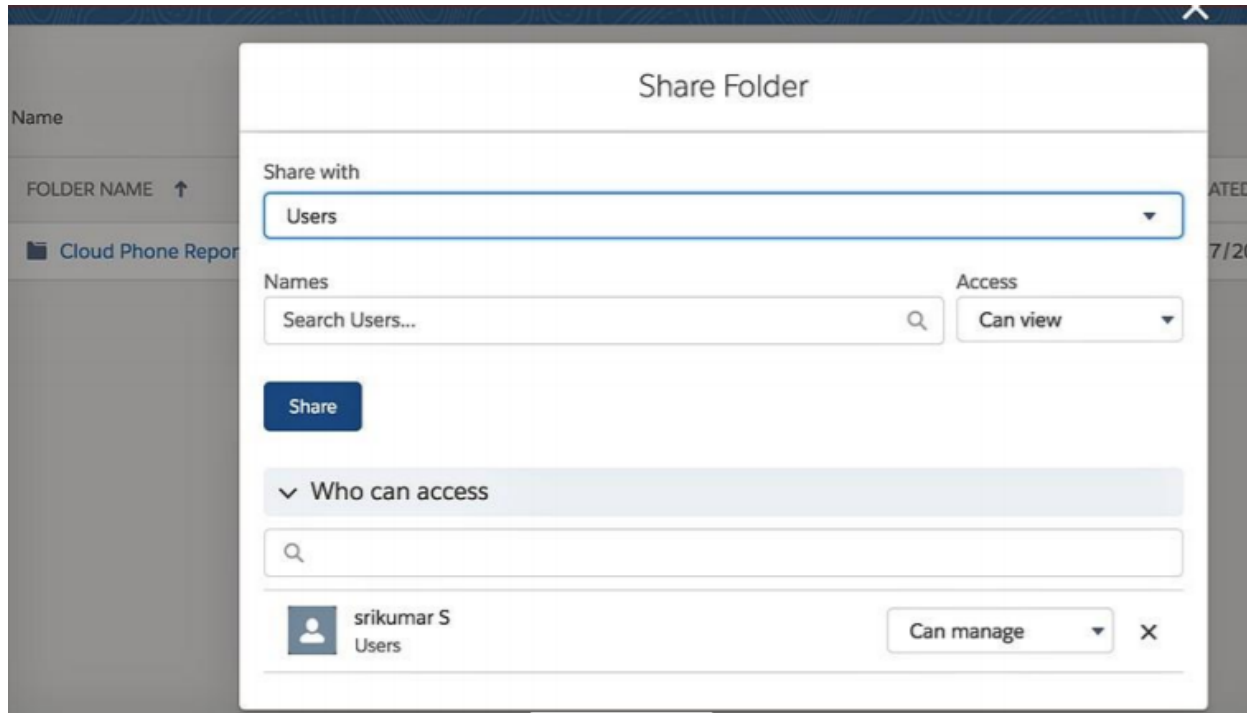




Click on the dropdown on the right of the **Cloud Phone Report** and click **Share**.



In the new window, select the Users or Roles you want to share the reports with, then click **Done** and **Close**.



AdminUI

AdminUI is a VisualForce page created for administrators to make organization-wide changes to Office@Hand for Lightning app settings. The page is: /apex/rcsfl adminUI. For example, if your Salesforce instance home page is <https://ap2.salesforce.com/home/home.jsp>, your adminUI URL would be <https://ap2.salesforce.com/apex/rcsfl adminUI>. You'll be prompted after you enter the URL to click **Initialize** to go to AdminUI.

Cloud Phone Settings

Auto Save Setting

Pop matching Salesforce entity record on call ringing

☐ Auto create call log on ringing

Associate Call Log with Person Account

Associate call log with Person Accounts using Related to field.

Log Customization

* The field types supported in call log are Lookup Relationship, Date, Picklist, Text and Text Area.

Available Fields		Selected Fields	
Due Date Only	<div>Add</div> <div>Remove</div>	Subject	<div>Up</div> <div>Down</div>
Priority *		Name ID	
Type		Related To ID	
RC Logging Type		Description	
Recording Information key			

On the **Cloud Phone Settings** page you can access the following:

- **Auto Save Call Log Setting:** Besides the **Screen Pop Settings** you made in **Setup Home > Softphone Layout**, in this section you can further define when to do the screen pop: whether to pop when an inbound call is ringing or when it's answered. Also, you can define whether to auto-create call logs and when to log them. This setting will override the settings the user does on the **app > Settings** page.
- **Associate Call Log with Person Account:** Hidden by default. If you want to show it, you are required to be partners of Salesforce and just open a case asking Salesforce Support to enable person account by providing Organization ID. Navigate to **Settings > Company Information** and use the **Salesforce.com Organization ID** field.
- **Log Customization:** Add/remove call log fields by using the left/right arrows and order the selected call log fields by using the up/down arrows. Click **Save** when call log settings are as expected and refresh the page. The call log UI of the Office@Hand for Salesforce app should render these fields in the exact order they are listed in the **Selected fields** box.

Note: The field types supported in **Call Log** are **Lookup Relationship**, **Date**, **Date/Time**, **Picklist**, **Text**, and **Text Area**. The incoming call pop-up on the new browser tab is not working in Lightning mode, but it works well in Classic mode.

The screenshot shows the Salesforce Setup interface. On the left sidebar, under 'SETTINGS', the 'Company Information' link is highlighted with a red box. The main content area displays the 'Company Information' page with various organization details. The 'Salesforce.com Organization ID' field is highlighted with a red box.

Organization Detail		Phone
Organization Name	SKumar & Co	
Primary Contact	srikumar S	Fax
Division		Default Locale
Address	US	English (United States)
Fiscal Year Starts In	January	Default Language
Activate Multiple Currencies	<input type="checkbox"/>	English
Newsletter	<input checked="" type="checkbox"/>	Default Time Zone
Admin Newsletter	<input checked="" type="checkbox"/>	(GMT-07:00) Pacific Daylight Time
Hide Notices About System Maintenance	<input type="checkbox"/>	Currency Locale
Hide Notices About System Downtime	<input type="checkbox"/>	English (United States) - USD
		Used Data Space
		296 KB (6%) View
		Used File Space
		13 KB (0%) View
		API Requests, Last 24 Hours
		0 (15,000 max)
		Streaming API Events, Last 24 Hours
		0 (10,000 max)
		Restricted Logins, Current Month
		0 (0 max)
		Salesforce.com Organization ID
		00Df40000003khEA
		Organization Edition
		Developer Edition
		Instance
		NA59
		Modified By
		srikumar S, 5/14/2018 5:12 PM

Created By: srikumar S, 5/14/2018 5:03 PM

Call Recording

To allow users in your organization to access their Office@Hand call recordings from within Salesforce, navigate to **Object Manager > Task > Page Layout**.


Setup

▼

Home

Object Manager

▼



SETUP

Object Manager

32 Items, Sorted by Label

Order Product	OrderItem
Price Book	Pricebook2
Price Book Entry	PricebookEntry
Product	Product2
Quick Text	QuickText
Scorecard	Scorecard
Scorecard Association	ScorecardAssociation
Scorecard Metric	ScorecardMetric
Social Persona	SocialPersona
Task	Task
User	User

Click **Edit** for the page layout you want to configure.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar contains a list of setup categories: Details, Fields & Relationships, Page Layouts (highlighted with a red box), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Object Limits, Record Types, and Triggers. The main content area is titled 'Page Layouts' and shows '1 Items, Sorted by Page Layout Name'. A table lists the page layouts with columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The table contains one row: 'Task Layout' created by 'srikumar S' on 5/14/2018 at 5:03 PM and modified by 'srikumar S' on 5/17/2018 at 6:30 PM. To the right of the table, there is a 'New' button and a 'Page Layout Assignment' button. Below the table, there are 'Edit' and 'Delete' buttons, with the 'Edit' button highlighted by a red box.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Task Layout	srikumar S, 5/14/2018, 5:03 PM	srikumar S, 5/17/2018, 6:30 PM

Move the **Call Recording** field to the **Task Detail** section.

The screenshot shows the Salesforce Task Layout editor interface. At the top, there's a 'Task Layout' dropdown and a 'Layout Properties' button. Below this is a 'Fields' panel on the left and a 'Quick Find' search bar. The main area displays a grid of fields. A red box highlights the 'Call Recording' field in the 'Fields' list. A red arrow points from this field to the 'Task Detail' section at the bottom of the layout. The 'Task Detail' section contains a 'Task Information' header and a list of fields including 'Assigned To', 'Call Object Identifier', 'Subject', 'Due Date', 'Phone', 'Priority', 'Status', 'Name', 'Related To', 'Email', 'Call Type', and 'Call Duration'. The 'Call Recording' field is being moved to this section.

Fields	Field Name	Type
Section	Call Object Ident...	checkbox
Blank Space	Call Recording	checkbox
Assigned To	Call Result	checkbox
Call Duration	Call Type	checkbox
Comments	Created By	checkbox
Date_time	Due Date	checkbox
formula-date	Geolocation	checkbox
Name	Phone	checkbox
Priority	Public	checkbox
Repeat This Task	RequiredPick	checkbox
Subject	Task Subtype	checkbox
Comments	Email	checkbox
Created By	hello_a	checkbox
Date_time	phone	checkbox
Due Date	Recurrence Interval	checkbox
Geolocation	requiredText	checkbox
Phone	testField	checkbox
Public	Type	checkbox
RequiredPick	Related To	checkbox
Task Subtype	Status	checkbox
checkbox	Test	checkbox

Task Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

New Task Log a Call New Event Edit Comments Change Date Change Status Change Priority

Salesforce1 and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Salesforce1 and Lightning Experience pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Task Detail

Standard Buttons: Edit Delete Delete Series Create Follow-Up Task Create Follow-Up Event Custom Buttons

Task Information (Header visible on edit only)

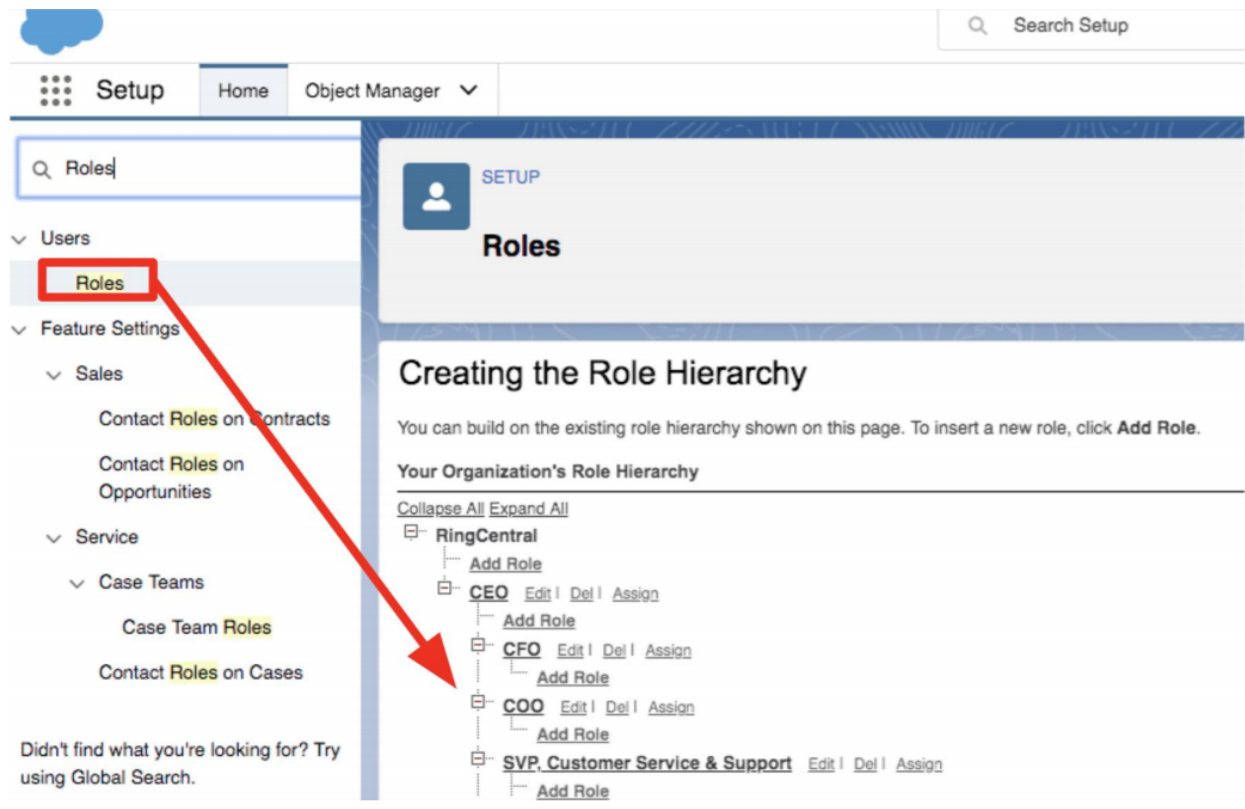
- Assigned To: Sample User
- Call Object Identifier: Sample Call Object Identifier
- Subject: Sample Subject
- Due Date: 1/26/2016 11:56 PM
- Phone: 1-415-555-1212
- Priority: Sample Priority
- hello_a: www.salesforce.com
- Status: Sample Status
- Name: Sample Contact
- Related To: Sample Contract
- Email: sarah.sample@company.com
- Call Type: Sample Call Type
- Call Duration: 58,659

Analytics Report

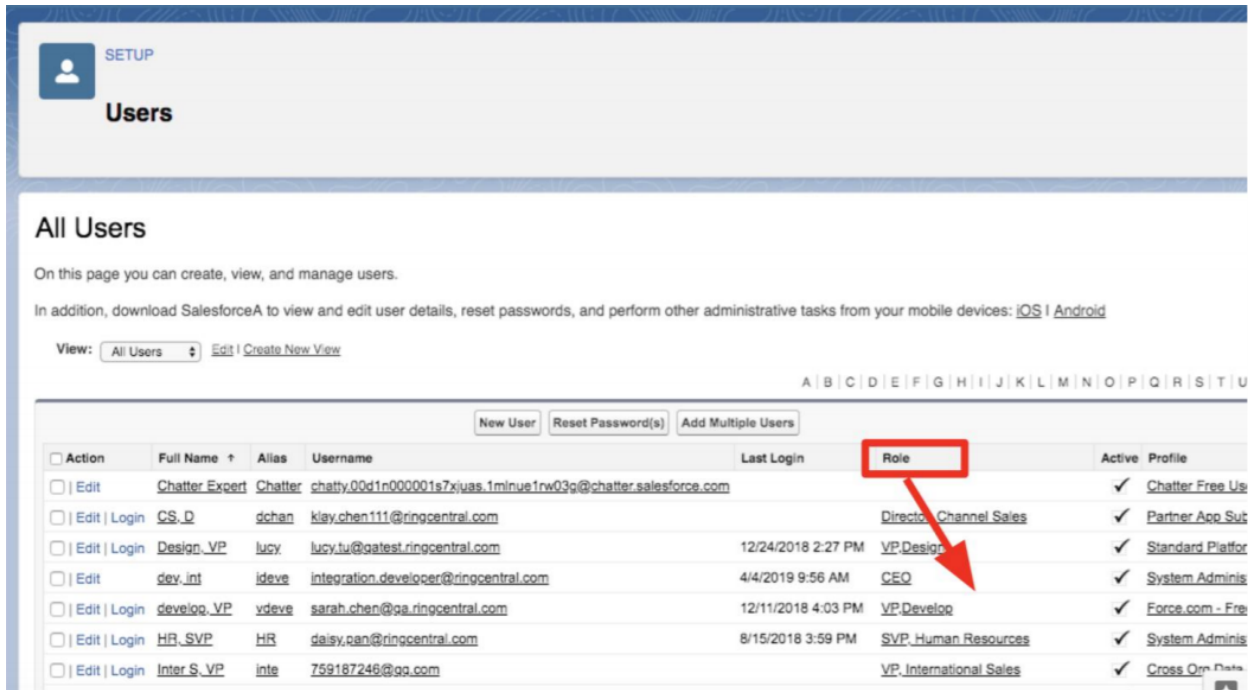
Analytics Report is a key feature that gives your sales leaders complete visibility on their team's performance from a call data perspective. It also gives sales reps insights into their call data.

Prerequisites: Define hierarchy and assign roles to users in Salesforce

In order to create a team view and individual representative view, navigate to **Setup > Manage Users > Roles**.



You can define team hierarchy here and assign roles to users.



SETUP

Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

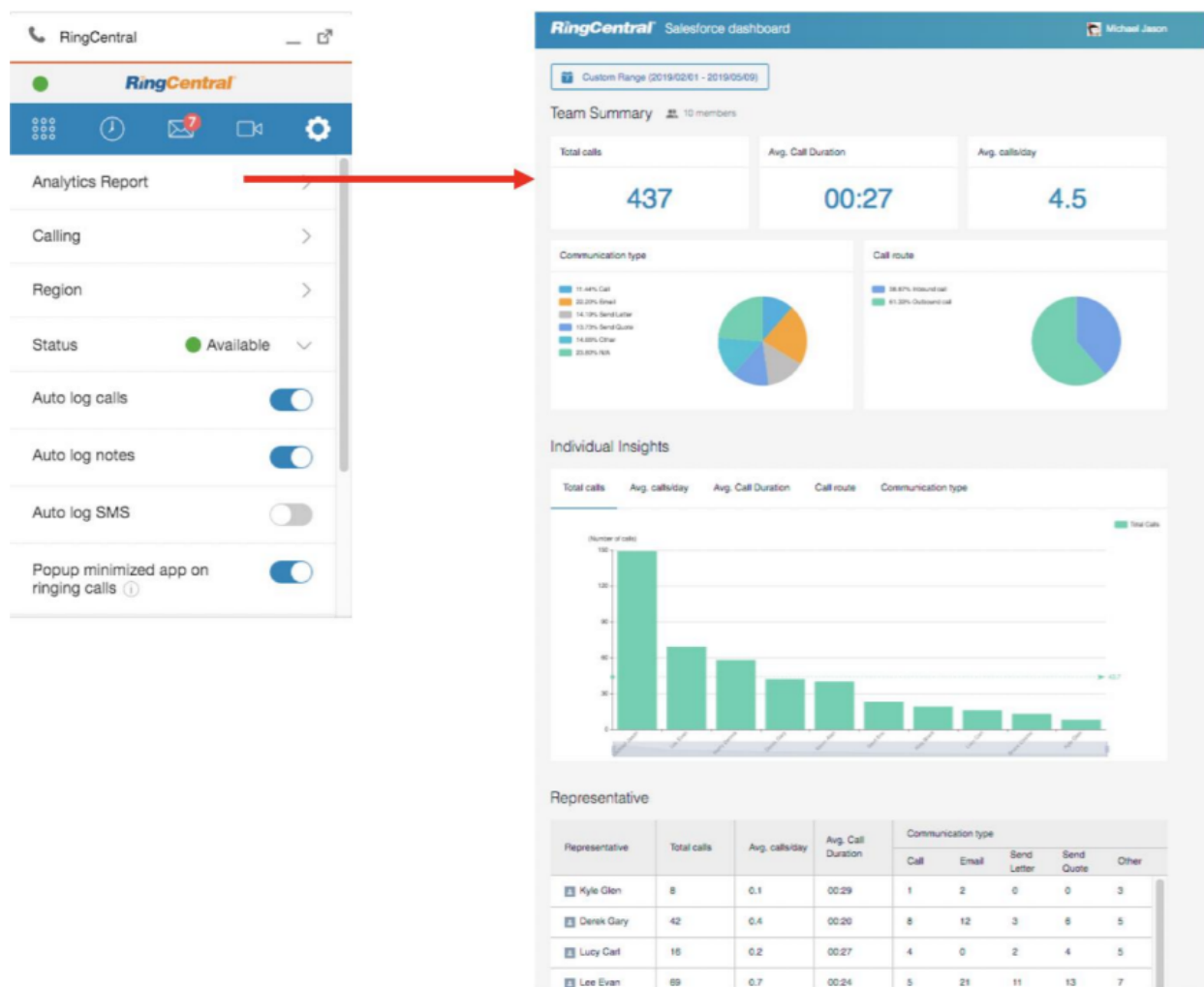
View: [All Users](#) | [Edit](#) | [Create New View](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty.00d1n0000001s7xiuas.1minus1nw03g@chatter.salesforce.com			✓	Chatter Free Us
<input type="checkbox"/> Edit Login	CS_D	dchan	klay.chen111@ringcentral.com		Director, Channel Sales	✓	Partner App Sub
<input type="checkbox"/> Edit Login	Design_VP	lucy	lucy.tu@gatest.ringcentral.com	12/24/2018 2:27 PM	VP.Design	✓	Standard Platfor
<input type="checkbox"/> Edit	dev_int	ideve	integration.developer@ringcentral.com	4/4/2019 9:56 AM	CEO	✓	System Adminis
<input type="checkbox"/> Edit Login	develoo_VP	vdeve	sarah.chen@qa.ringcentral.com	12/11/2018 4:03 PM	VP.Develop	✓	Force.com - Fre
<input type="checkbox"/> Edit Login	HR_SVP	HR	daisy.pan@ringcentral.com	8/15/2018 3:59 PM	SVP_Human Resources	✓	System Adminis
<input type="checkbox"/> Edit Login	Inter_S_VP	inte	759187246@qq.com		VP_International Sales	✓	Cross On Data

Entry for Analytics Report

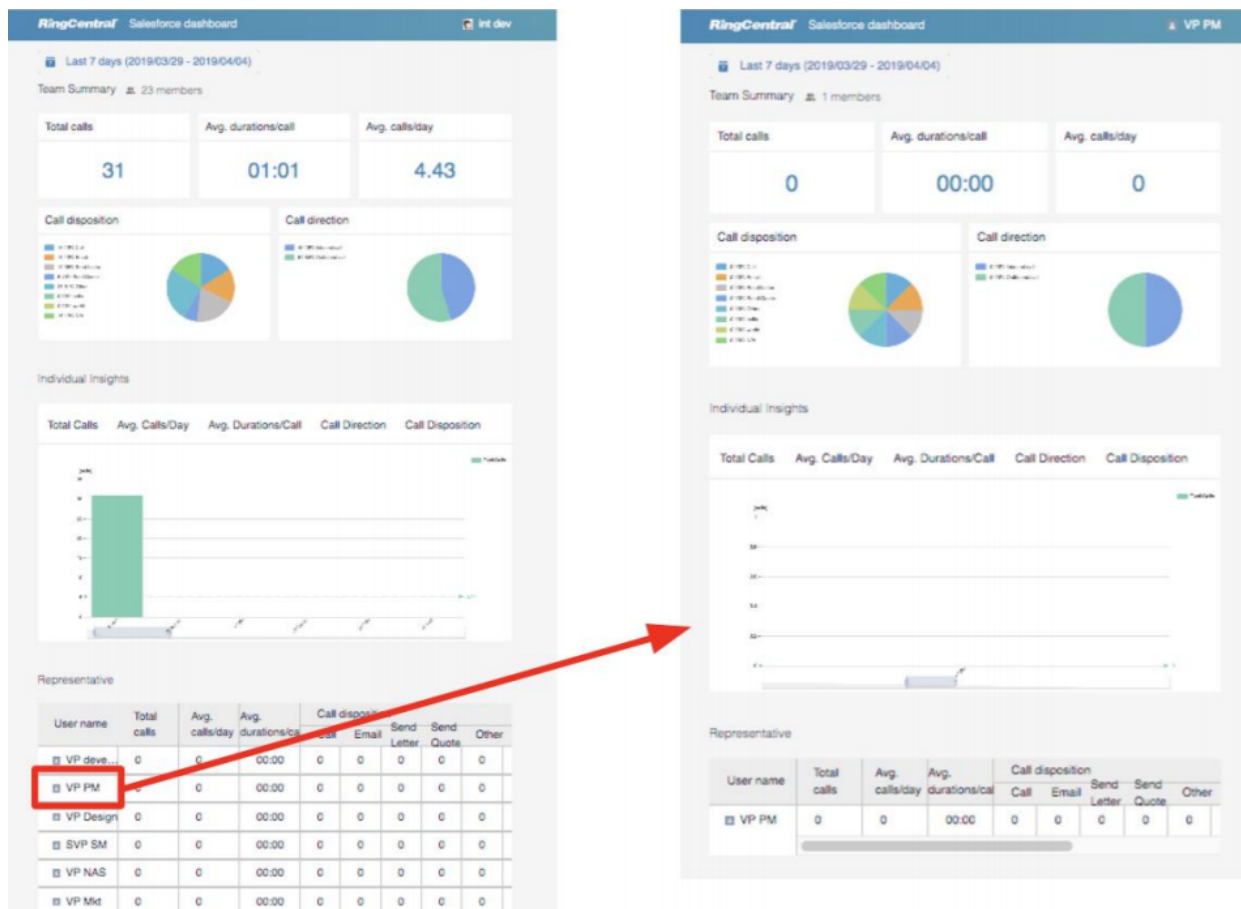
Analytics Report is available under the **Settings** menu. If you have not set up the role hierarchy, it only shows your individual data for the signed in account. If role hierarchy is enabled, it shows the data for all the team members.



Team view vs. Individual view

You can see all the members under your role based on the Salesforce roles hierarchy. When you click on the name of a sales representative on the table at the bottom of the report, it redirects to an individual page view showing the report for the selected sales representative.

There is no difference between **Team view** page and **Individual view** page. Team view, in addition to individual view, will show data for the team members.



Note:

In the current version, the call data shown on Analytics Report is limited to call data that has been logged to the Salesforce Database. The full coverage call data is on the roadmap and it will be coming soon.

Cloud Phone Reports (beta)

With Cloud Phone Reports, Team Leads and Sales Managers will be able to leverage Office@Hand Analytics data such as overall team performance and view it as a native Salesforce report. These reports provide you with the flexibility to edit and customize the report within the Salesforce interface, which the current visualforce based report does not support.

Prerequisite: Users who have Reports/Dashboard features permission would be able to access and edit the reports and also make copies for the future.

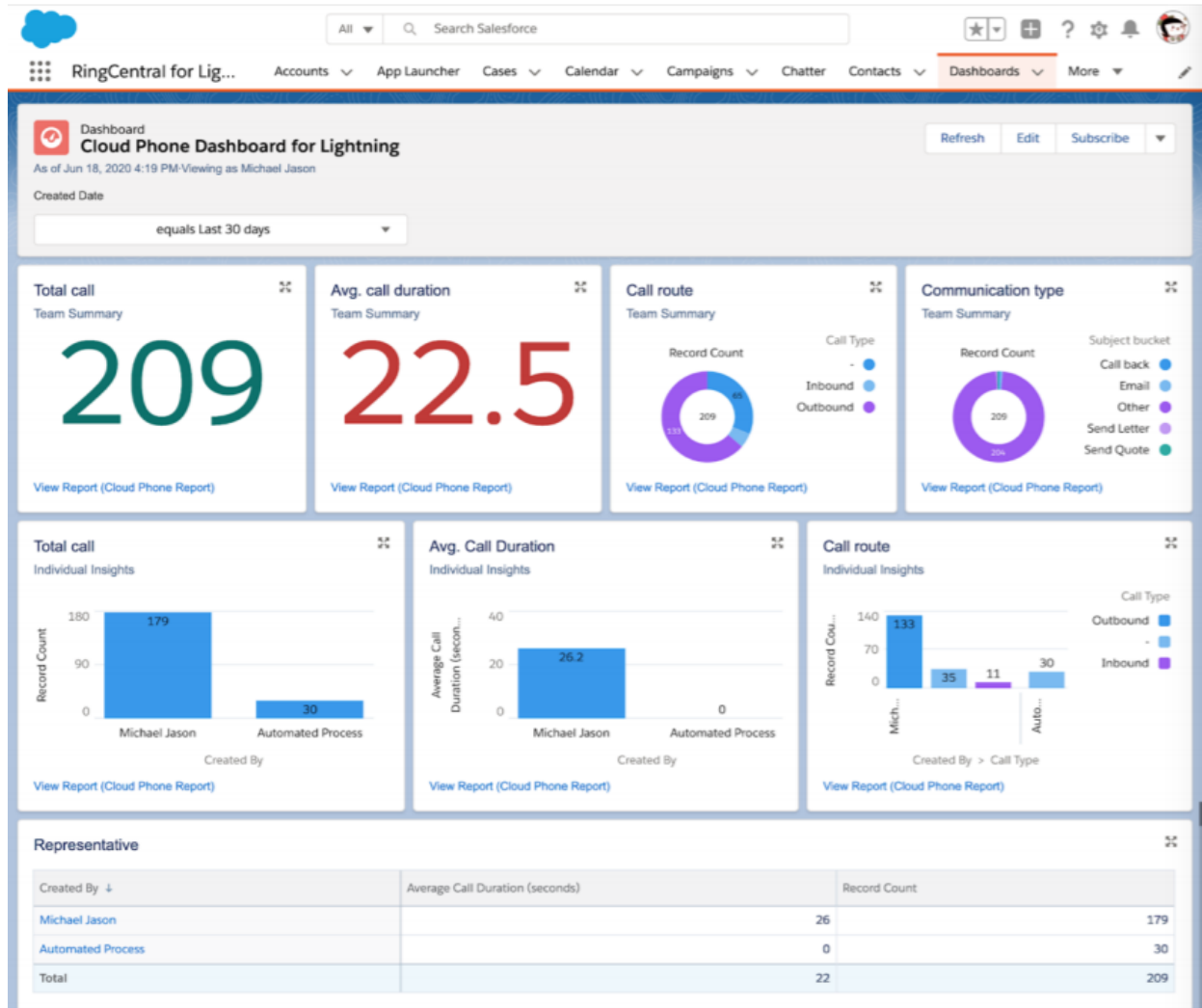
Availability: Supported both in Salesforce Classic and Lightning Experience. The Cloud Phone Report will be available from Salesforce Dashboard.

Limitations: Compared to the existing Visualforce based Office@Hand for Salesforce Analytics Reports, the Cloud Phone Reports has certain limitations and features yet to be supported, such as:

- Average calls details are unavailable
- Access to report page for a specific user on clicking on the reps name is unavailable

The screenshot shows the Salesforce Lightning interface. At the top, there's a navigation bar with tabs for Accounts, App Launcher, Cases, Calendar, Campaigns, Chatter, Contacts, Contracts, Dashboards, Files, Groups, Home, Leads, Reports, and More. A search bar is also present. On the left, there's a sidebar with a list of apps, including High Velocity Sales, Service, RingCentral for Lightning (highlighted), Marketing, Community, Salesforce Chatter, and Content. The main content area displays a table of recent reports. The table has columns for Description, Folder, Created By, and Created On. The data rows show various reports, including 'Cloud Phone Report' and 'Private Reports'. A 'Recent records' dropdown menu is open, showing options like 'My Calls Today', 'Avg. Call Duration', and 'Total Calls'.

Description	Folder	Created By	Created On
Cloud Phone Report	Cloud Phone Report	Michael Jason	4/15/2020, 11:52 AM
Cloud Phone Report	Cloud Phone Report	Michael Jason	6/17/2020, 11:18 AM
Albert Testing	Albert Testing	Michael Jason	1/16/2020, 3:31 PM
Cloud Phone Report	Cloud Phone Report	Michael Jason	8/27/2018, 9:53 PM
Albert Testing	Albert Testing	Michael Jason	1/15/2020, 3:05 PM
Private Reports	Private Reports	Michael Jason	3/22/2019, 9:19 AM

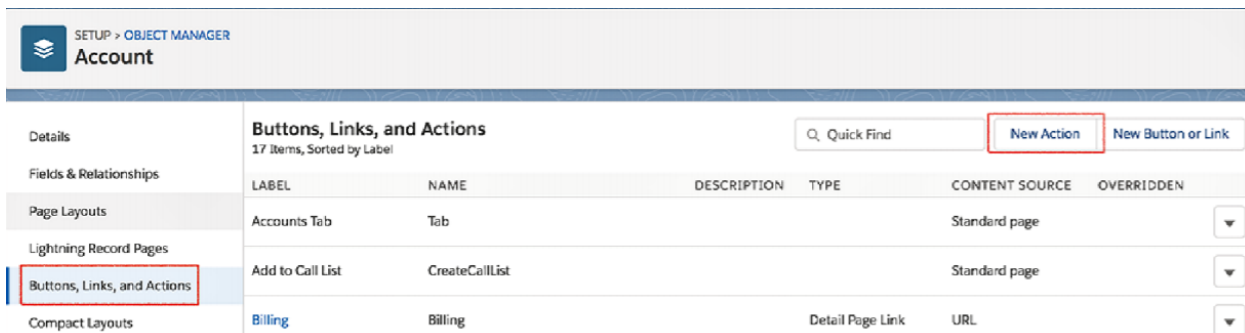
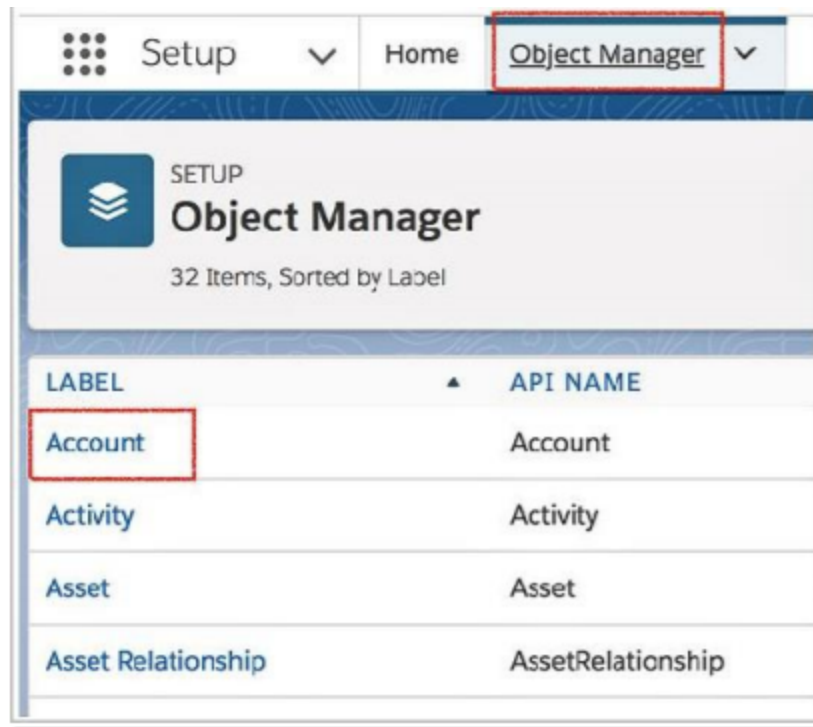


Adding Office@Hand Call and SMS options to Salesforce mobile app

Follow the steps below to add **Call with Office@Hand** and **SMS with Office@Hand** options to the Account/Contact/Lead details tab in the Salesforce app. As an example, below are steps to add the options to the **Accounts Page Layout**.

Creating New Actions

Navigate to **App Setup > Customize > Accounts > Buttons, Links, and Actions > New Action**.



Select *Custom Visualforce* as **Action type** and select *Phone Numbers Account [Phone_Numbers_Account]* in the **Visualforce Page** dropdown list, enter Call with Office@Hand as the **Label**, and click **Save**.

Enter Action Information Save Cancel

Object Name i

Action Type i

Visualforce Page i

Height i

Standard Label Type i

Label i

Name i

Description i

Icon [Change Icon](#)

Save Cancel

Repeat the above step and select *Phone Numbers SMS Account* [*Phone_Numbers_SMS_Account*] in the **Visualforce Page** dropdown list, enter SMS with Office@Hand as **Label**, and click **Save**.

Enter Action Information Save Cancel

Object Name i

Action Type i

Visualforce Page i

Height i

Standard Label Type i

Label i

Name i

Description i

Icon [Change Icon](#)

Save Cancel

Adding Actions to Salesforce mobile app

Navigate to **Setup > Object Manager > Accounts > Page Layouts > Page Layout Assignment**. Select the **Page Layout** you want to change, and click **Edit**.

SETUP > OBJECT MANAGER
Account

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Page Layouts
4 Items, Sorted by Page Layout Name

Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Account (Marketing) Layout	srikumar S, 5/14/2018, 5:03 PM	srikumar S, 5/14/2018, 5:03 PM
Account (Sales) Layout	srikumar S, 5/14/2018, 5:03 PM	srikumar S, 5/14/2018, 5:03 PM
Account (Support) Layout	srikumar S, 5/14/2018, 5:03 PM	srikumar S, 5/14/2018, 5:03 PM
Account Layout	srikumar S, 5/14/2018, 5:03 PM	srikumar S, 5/17/2018, 6:26 PM

Edit
Delete

From the Salesforce1 & Lightning Actions list, drag the actions **Call with Office@Hand** and **SMS with Office@Hand** to the **Salesforce1 and Lightning Experience** section. Click **Save**.

The screenshot shows the Salesforce Lightning Actions configuration interface. At the top, there is a toolbar with buttons: Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below the toolbar is a sidebar with a list of categories: Fields, Buttons, Custom Links, Quick Actions, **Salesforce1 & Lightning Actions** (highlighted), and Expanded Lookups. The main area is titled 'Quick Find Salesforce1 Action Name' and contains a grid of actions. A red arrow points from the 'Call with RingCentral' action in the grid to the 'Call with RingCentral' button in the 'Salesforce1 and Lightning Experience' section.

Quick Find Salesforce1 Action Name					
Call	Check Integration...	Get Contacts	Log a Call	New Contact	New Lead
Call with RingCen...	Delete	Include Offline	Mobile Smart Actions	New Event	New Note
Change Owner	Edit	Link	New Account	New Event	New Opportunity
Change Record Type	File	Log a Call	New Case	New Group	New Task

Account Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic

Publisher

Post File New Task New Contact New Case Log a Call New Note New Opportunity New Event

Link Poll Question Send Email

Salesforce1 and Lightning Experience

Actions

Post File New Task New Contact New Case Log a Call New Note New Opportunity New Event

Link Poll Question Send Email Change Record Type Edit Send an Email Check Integration Status

Include Offline View Account Hierarchy Submit for Approval Change Owner Delete Sharing Get Contacts

Call Send Text Send Email View Website Call with RingCentral

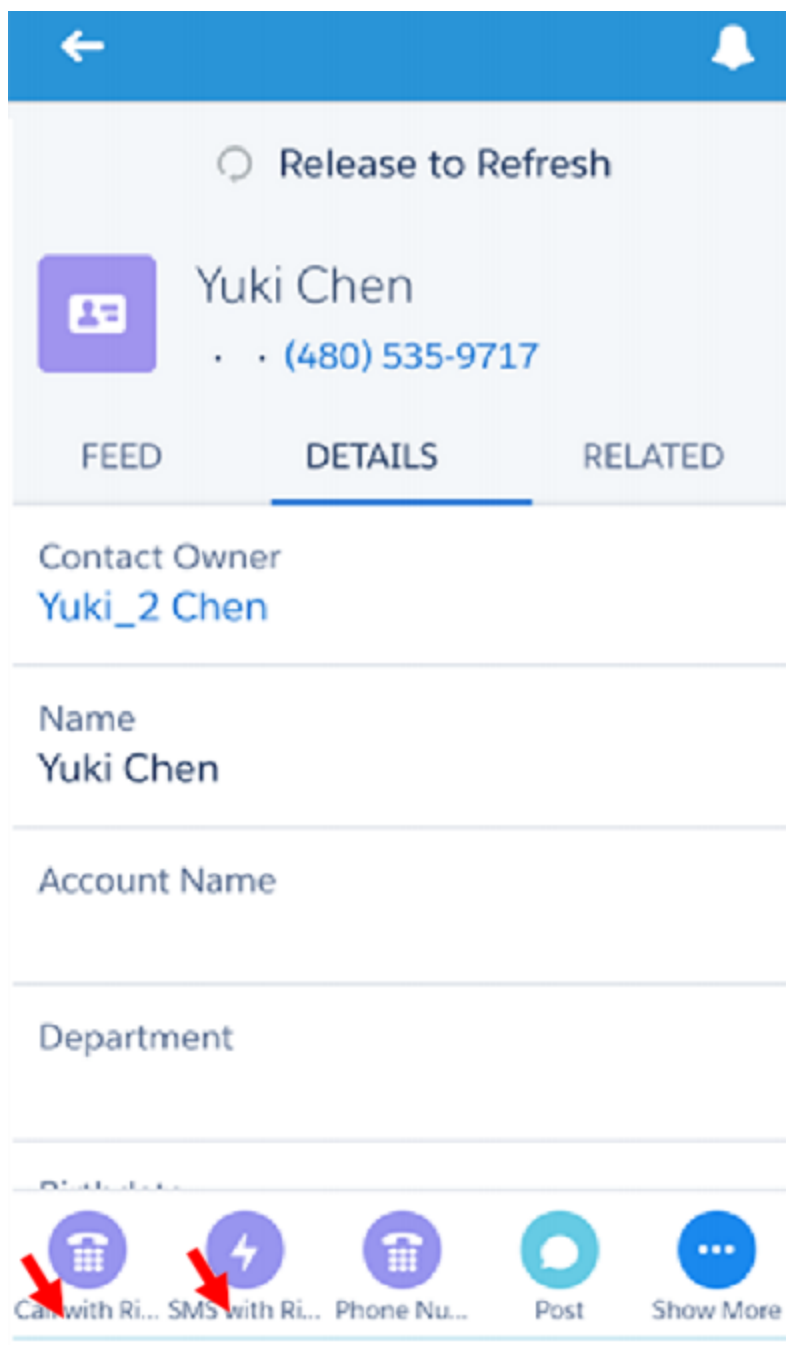
The screenshot displays the Salesforce Lightning page editor interface. At the top, there is a toolbar with buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below the toolbar is a 'Quick Find' search bar labeled 'Salesforce1 Action Name'. To the left of the main editor is a sidebar with a list of components: Fields, Buttons, Custom Links, Quick Actions, **Salesforce1 & Lightning Actions** (highlighted), and Expanded Lookups.

The main editor area is titled 'Account Sample' and contains three sections:

- Highlights Panel:** A section for customizing the highlights panel.
- Quick Actions in the Salesforce Classic:** A section for quick actions, including buttons for Post, File, New Task, New Contact, New Case, Log a Call, New Note, New Opportunity, New Event, Link, Poll, Question, and Send Email.
- Salesforce1 and Lightning Experience:** A section for actions, including buttons for Post, File, New Task, New Contact, New Case, Log a Call, New Note, New Opportunity, New Event, Link, Poll, Question, Send Email, Change Record Type, Edit, Send an Email, Check Integration Status, Include Offline, View Account Hierarchy, Submit for Approval, Change Owner, Delete, Sharing, Get Contacts, Call, Send Text, Send Email, View Website, Call with RingCentral, and SMS with RingCentral.

A red arrow points from the 'SMS with RingCentral' button in the top quick find grid to the 'SMS with RingCentral' button in the bottom actions bar.

Buttons are added. Navigate to **Salesforce1** and check the account's details. There will be **Call with Office@Hand** and **SMS with Office@Hand** options.



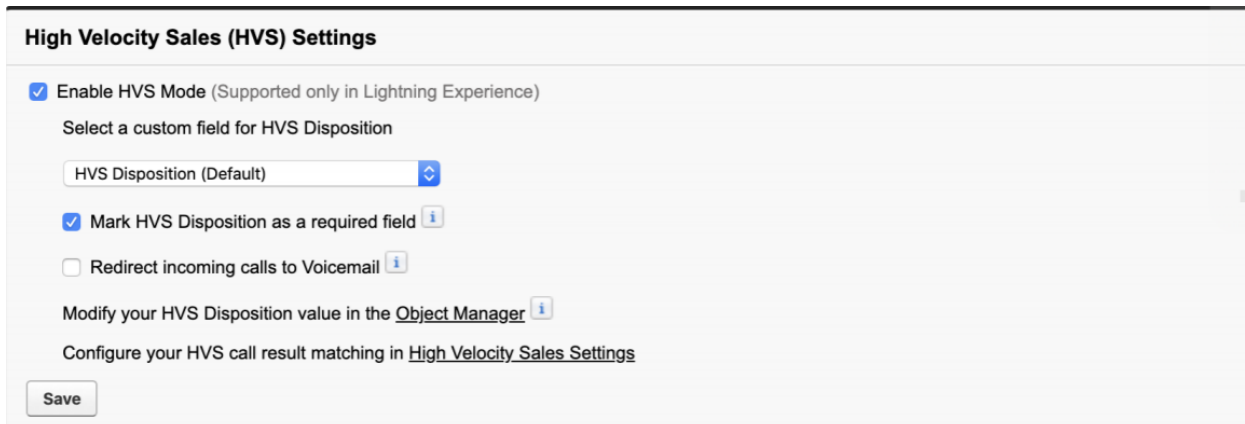
High Velocity Sales (HVS) settings (beta)

High Velocity Sales is a Salesforce app that targets improving sales processes and efficiency by helping reach out to the best leads, intelligently convert, and create new opportunities in one seamless workspace.

Prerequisite: Make sure the High Velocity Sales app is enabled in your organization's Salesforce account to use these functions.

HVS Settings can be selected from the **AdminUI**, which is the VisualForce page created for administrators to make organization-wide changes to Office@Hand for Lightning app settings. The page is: /apex/rcsfl adminUI.

For example, if your Salesforce instance home page is <https://ap2.salesforce.com/home/home.jsp>, your adminUI URL would be <https://ap2.salesforce.com/apex/rcsfl adminUI>. After you enter the URL, you'll be prompted to click **Initialize** to go to **AdminUI**.

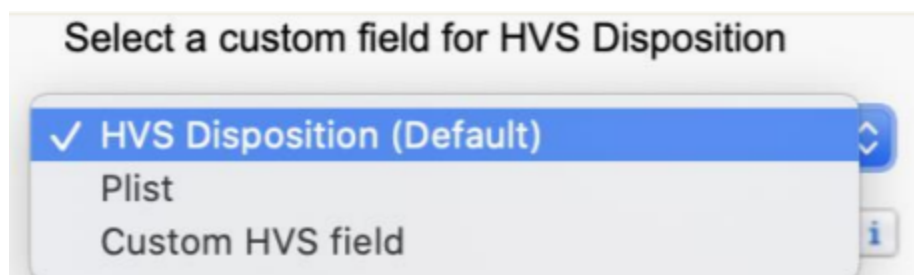


Enabling HVS Mode

Select the checkbox to enable **HVS Mode** in the Office@Hand for Salesforce Lightning widget, then click **Save**. When checked, HVS settings for Office@Hand for Salesforce Lightning app will be applied to all users in the organization who are assigned both the HVS app and Office@Hand for Salesforce Lightning widget. Once HVS Mode is enabled, additional settings can be configured by the administrator.

Selecting a custom field for HVS Disposition

To log the call outcome and help move a Sales Cadence forward, Office@Hand for Salesforce provides a dropdown menu in the call log called **HVS Disposition**. Organizations can choose to log the call outcome using a custom field instead of the HVS Disposition. An example for a custom field could be a **Picklist (Plist)**.



The Log Customization section in the **Admin UI** can be used to display selected fields in the call log by moving them from **Available Fields** section to the **Selected Fields** section. For HVS related calls, when, for example, **Plist** is selected as the custom field, it will appear as **HVS Occupied**. All other settings of this field become invalid and this field will show on the top of every call log.

Log Customization

* The field types supported in call log are Lookup Relationship, Date, Picklist, Text and Text Area.

Available Fields		Selected Fields	
CallId PhoneNumber Time Initiated CALL_UNIQUE_ID CALL_UUID RC Logging Type Recording Information	Add <input type="button" value="▶"/> Remove <input type="button" value="◀"/>	Subject Name ID Related To ID Description Priority * Plist * Custom HVS field	Up <input type="button" value="▲"/> Down <input type="button" value="▼"/>

Marking HVS Disposition as a required field

Organizations can choose to make the HVS Disposition a required field where end users have to mandatorily select a value to save the call log and move the Sales Cadence forward.

Recommendation: Keeping this setting checked helps end users such as Sales Agents log the calls completely without missing any important action associated with their calls and Sales Cadences.

Redirecting incoming calls to voicemail

When checked, any incoming calls coming in during an active HVS call will be directed to Voicemail. However, the Office@Hand for Salesforce displays a prompt to take the appropriate action for the call log.

Modify your HVS Disposition value in the Object Manager

The dropdown list of values that can be selected for the HVS Disposition field can be customized through the **Object Manager**. Click on Object Manager to open a new tab to the **Salesforce Setup** page displaying Object Manager settings.

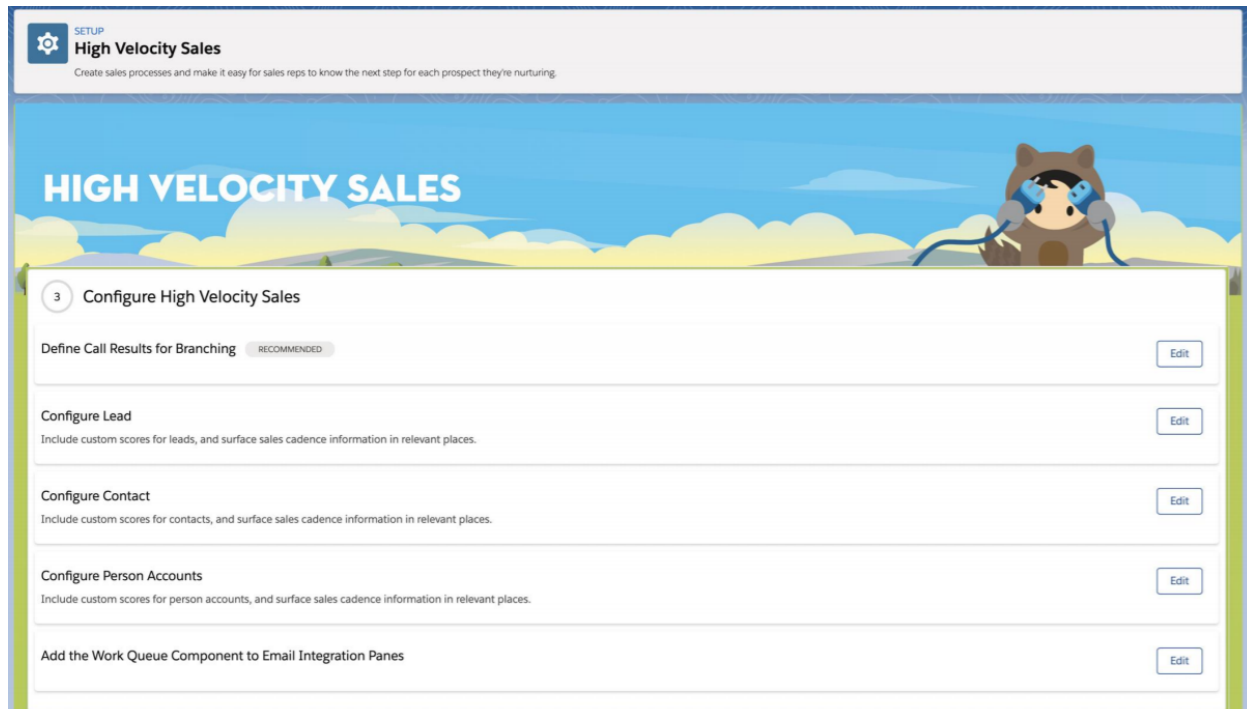
You can find the HVS Disposition field in the Activity or Task Objects in the Object Manager. If present in Activity, click **Activity > Fields & Relationships > HVS Disposition**. If you have selected a custom field to log the HVS call outcome, you will see the custom field under **Fields & Relationships**.

The screenshot shows the Salesforce Setup page with the Object Manager tab selected. The breadcrumb trail is 'SETUP > OBJECT MANAGER'. The main heading is 'Activity'. On the left sidebar, the 'Fields & Relationships' section is highlighted with a red box. The main content area shows 'Fields & Relationships' with 44 items, sorted by Field Label. A table lists several fields, with 'HVS Disposition' highlighted by a red box.

Field Label	Field Name	Field Type
DateRequired	DateRequired__c	Date
email	email__c	Email
external_whoid	external_whoid__c	Text(255)
external_whoid	attsfl__external_whoid__c	Text(255)
HVS Disposition	hvs_disposition__c	Picklist
key	key__c	Text(255)

Configuring your HVS call result matching in High Velocity Sales Settings

You can configure the call results for branching and any additional settings by clicking on the **High Velocity Sales** settings. A new tab opens showing the High Velocity Sales settings page in Salesforce Setup interface.



Enabling Do Not Contact

Contact and Lead type objects in Salesforce have a default field **Do Not Call** available in the Contact or Lead layout, which is used by admins as a flag to remind end user to not to contact this record.

Office@Hand for Salesforce Integration can be enabled to honor the Do Not Call (DNC) flag set within Leads and Contacts in Salesforce.

If a Lead or a Contact is flagged with the DNC field, then the Salesforce admins can enable the Office@Hand for Salesforce to restrict the end users in the organization from calling or sending text messages to those leads or contacts.

Here are the details of the DNC capability in RingCentral for Salesforce.

1. Upgrade the Office@Hand for Salesforce to latest version (v6.11.0 or later).
2. Make sure the **DNC** field is available to be set in the Salesforce Org. This can be done by enabling the DNC field in the page layout in Contact and Leads.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic, and Hierarchy Columns. The main content area is titled 'Contact' and shows a 'Page Layout' editor. The 'Fields' tab is active, displaying a list of fields in a table. A red box highlights the 'Do Not Call' field in the 'Description' column. A red arrow points from this field to the 'Other Phone' field in the 'Contact Information' section below.

Field Name	Description
Assistant	Contact Owner
Asst. Phone	Created By
Account Name	Data.com Key
AccountPhone	Department
Clean Status	Email Opt Out
	Do Not Call

Contact Information (Header visible on edit only)

Contact Owner	Sample Text	Phone	1-415-555-1212
Name	Sarah Sample	Home Phone	1-415-555-1212
Account Name	Sample Text	Mobile	1-415-555-1212
Title	Sample Text	Other Phone	1-415-555-1212
Department	Sample Text	Fax	1-415-555-1212
Birthdate	3/16/2021	Email	sarah.sample@company.com
Reports To	Sample Text	Assistant	Sample Text
Lead Source	Sample Text	Asst. Phone	1-415-555-1212
AccountPhone	1-415-555-1212		

Address Information (Header visible on edit only)

Mailing Address	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US	Other Address	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US
-----------------	--	---------------	--

Additional Information (Header visible on edit only)


3. Open the **AdminUI** for Office@Hand for Salesforce. There shall be a Do Not Call (DNC) Settings session. This feature is turned off by default.


Do Not Call (DNC) settings

Turning On the DNC settings below will fully or partially restrict the users to call or message the records flagged with DNC within Salesforce.


☐ Turn On DNC settings while calling or messaging


Call settings

☐ Restrict calls for DNC records 

☒ Override and call DNC records 

SMS settings

☐ Restrict SMS for DNC records 

☒ Override and SMS DNC records 

Save


4. To turn on the feature, check **Turn On DNC settings while calling or messaging**, then select the **Call settings** and **SMS settings**.


Do Not Call (DNC) settings

Turning On the DNC settings below will fully or partially restrict the users to call or message the records flagged with DNC within Salesforce.


☒ Turn On DNC settings while calling or messaging


Call settings

☒ Restrict calls for DNC records 

☐ Override and call DNC records 

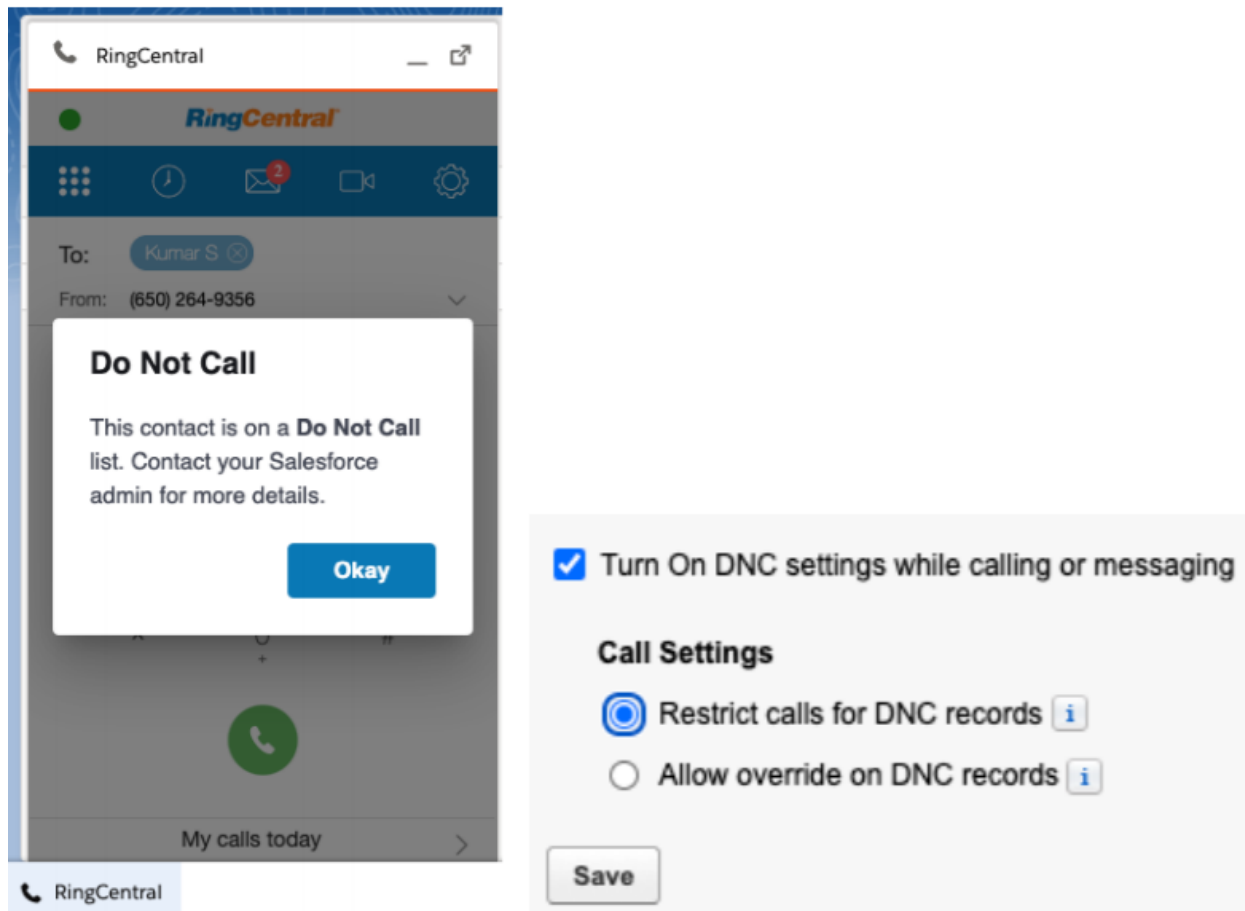
SMS settings

☒ Restrict SMS for DNC records 

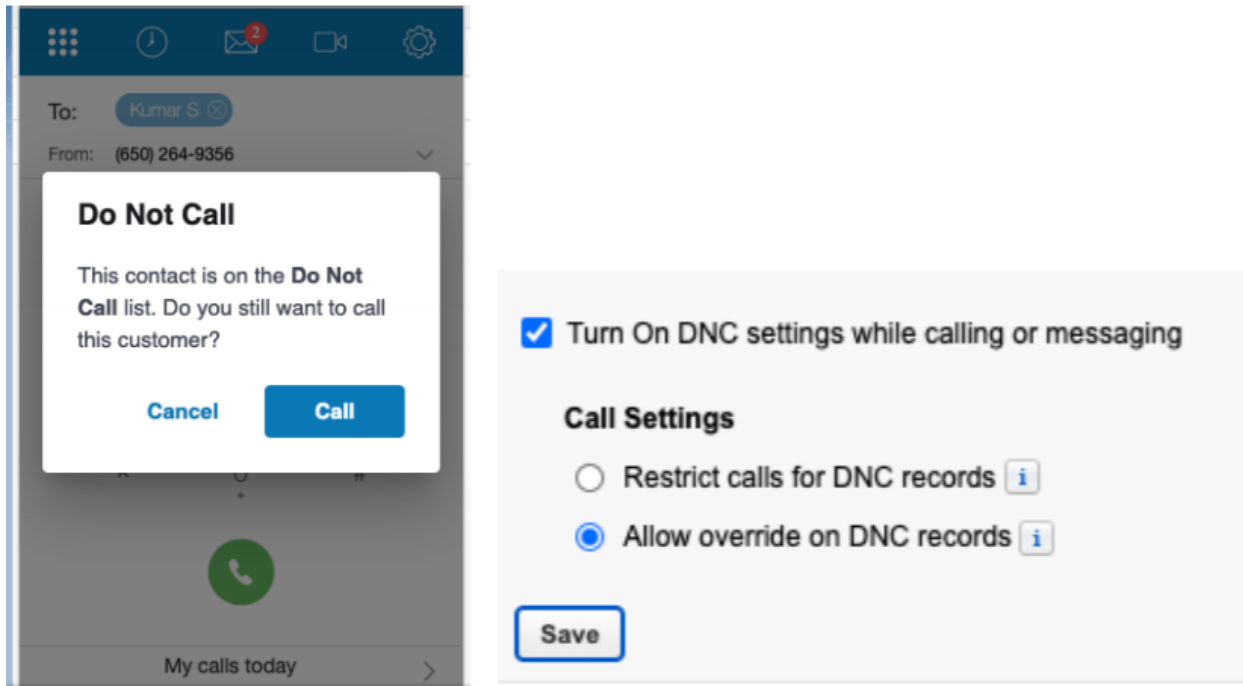
☐ Override and SMS DNC records 

Save

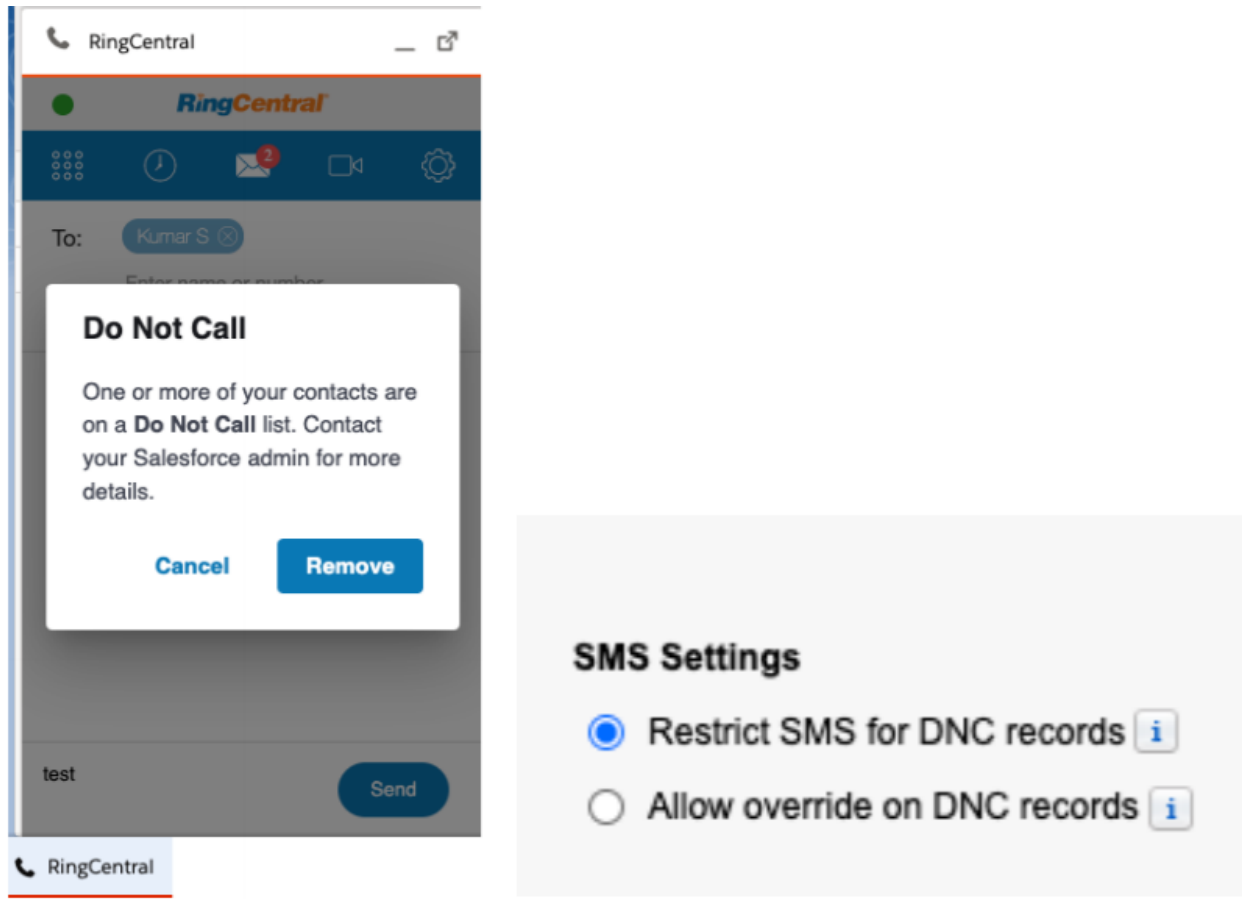
5. The DNC call settings
 - a. **Restrict calls for DNC records:** In this mode, end users will not be able to make calls to DNC records with Office@Hand for Salesforce. A notification will pop up when the end user initiates a call stating they cannot place the call as record is on DNC.



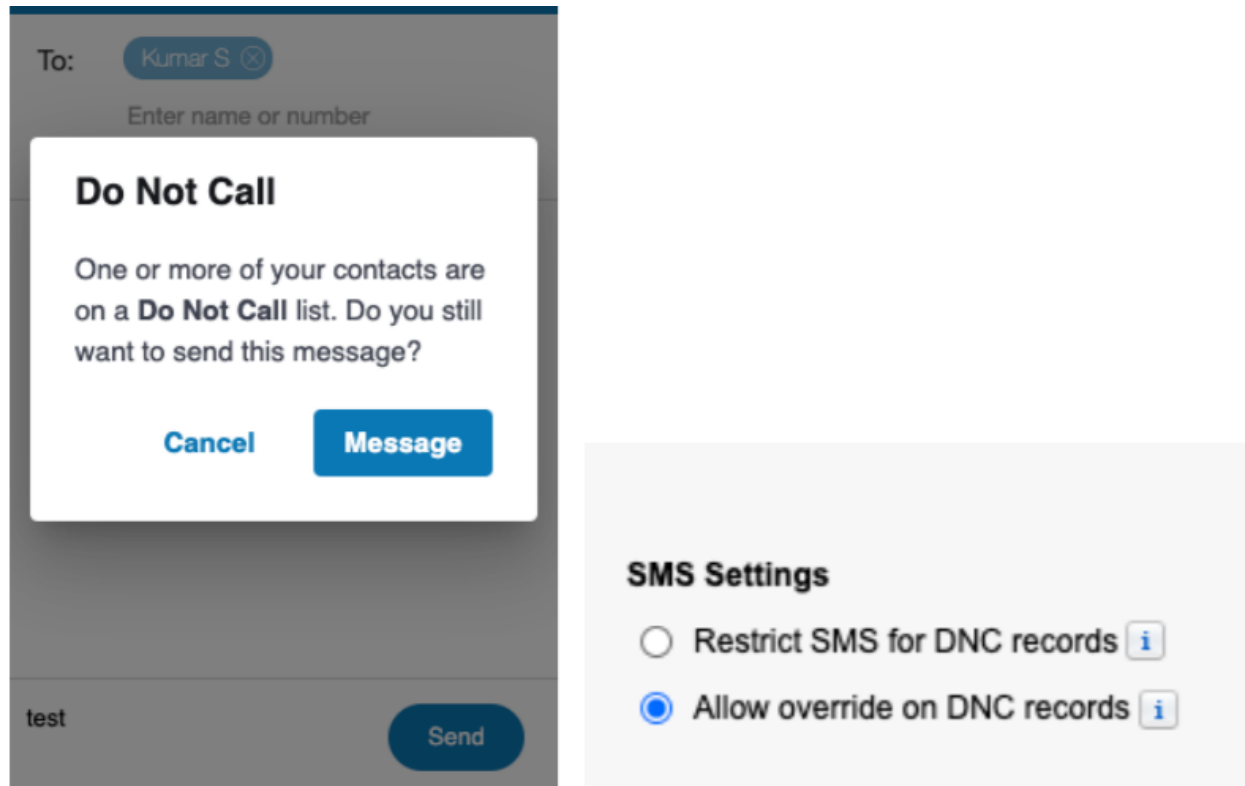
- b. **Override and call DNC records:** In this mode, when end user is trying to make calls to DNC records with Office@Hand for Salesforce, they will be notified that this is a DNC record, but the end user will still be given the capability to override and make calls.



6. The DNC SMS settings
 - a. **Restrict SMS for DNC records:** In this mode, end users will not be able to SMS DNC records with Office@Hand for Salesforce. A notification will pop up and alert the user.



- b. **Override and SMS DNC records:** In this mode, when end users attempt to SMS DNC records with Office@Hand for Salesforce, they will be notified that this is a DNC record. However, the end user will still be able to override and SMS the DNC records.



7. Click the **Save** button to make the setting available for the organization. End user will need a reload (refresh or next login) to inherit the setting.

Note: DNC calling might introduce impact to performance. When the end user trying to make a call with a phone number, CTI will firstly send the phone number to Salesforce to see if it matches any DNC records. The time it takes for this process depends on the network condition, Salesforce server performance, and sometimes the local browser performance.

Troubleshooting

Q: Office@Hand for Salesforce is not visible for some profiles. What is the problem? Does Office@Hand for Salesforce require any special permission?

A: Office@Hand for Salesforce does not require any special permissions and it should work for all out-of-the-box profiles. First, ensure that the relevant users have been added to the Call Center as given here in Step 3 of the Call Center setup above.

It is also possible that there is a custom component in the sidebar layout and the JavaScript in those components is interfering with Office@Hand for Salesforce. To resolve this issue, temporarily remove all customizations that have been applied to the sidebar component.

Once you see Office@Hand for Salesforce rendered properly, add your custom components back one by one so you can pinpoint which bit is creating the issue. Once you find the component causing the problem, contact the developer of that component to fix the issue.

Q: Users don't see a new tab or window opening on incoming calls. What's wrong?

A: Ensure that the pop-up is not blocked by browser settings or by some other pop-up blocker installed on your desktop.

Q: Can I disable this feature for now?

A: You can do this by removing the users from Office@Hand for Salesforce Call Center profile.

Q: What browsers are supported?

A: The following browsers are supported by the App:

- Internet Explorer 11 and higher (Windows 7 and higher)
- Microsoft Edge 38 and higher (Windows)
- Firefox 52 and higher (Windows, Mac)
- Chrome 56 and higher (Windows, Mac)
- Safari 11 and higher (Mac)

Q: When logging into Office@Hand for Salesforce, users are getting this error message: "Your Office@Hand edition does not support Salesforce Integration - please call your Office@Hand account representative to upgrade your Office@Hand edition." What does that mean?

A: Not all Office@Hand editions can use this feature of Salesforce integration. You may have to upgrade your account to be able to use this feature. Please contact your Office@Hand representative to get more information.

Q: Some of my users are getting a message saying “Insufficient Privileges” where the Office@Hand integration should be.

A: These users require access to the Office@Hand Visualforce page in their profile. To enable this access, go to the user’s profile. You’ll find a section called Visualforce Page Access. Ensure that the page Office@Hand.OpenCTIIndex is included in this profile.

Q: Click-to-dial is not working for some or all of my users. How can I fix it?

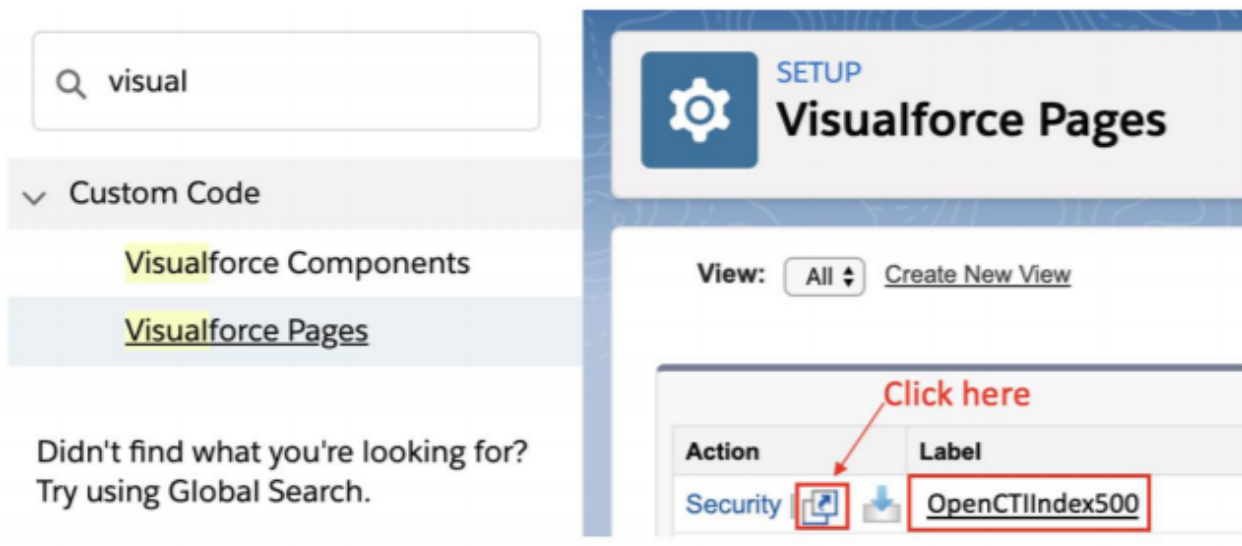
A: First, navigate to **App Setup > Call Center > Customize Call Centers** and verify that the CTI Adapter URL is pointing at: /apex/Office@Hand.OpenCTIIndex#/

If it is not pointing at the URL above, then change it to that URL and see if that fixes the issue. If the issue is still not fixed, ensure your users don’t have other apps that are handling click-to-dial calls, such as InsideSales PowerDialer.

Q: I am facing major issues after upgrading my Office@Hand for Salesforce to the latest version.

A: You can roll back to the previous 5.x version by following the steps below.

1. Navigate to **Setup > Visualforce Pages**, then click the **Preview** icon next to **OpenCTIIndex500**.

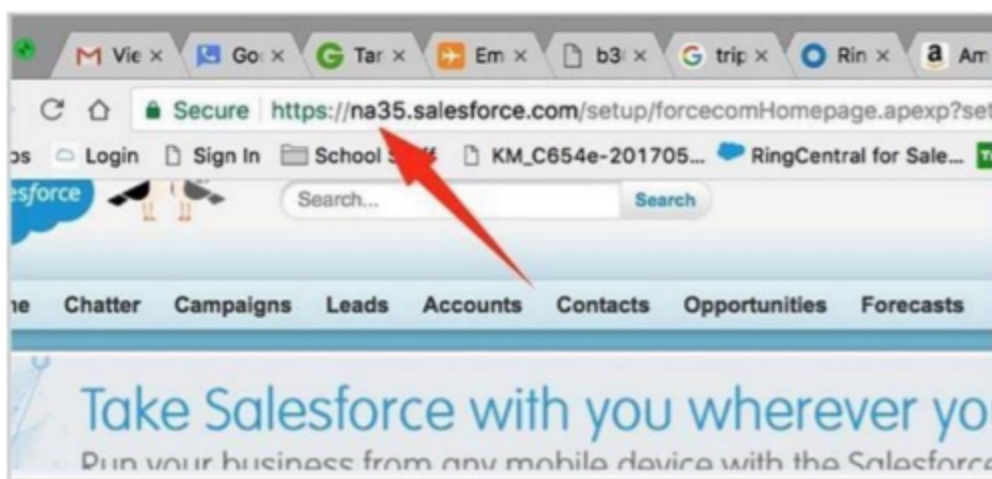


2. After the page opens in a new tab or window, copy its URL. For example, the full URL is: <https://c.na78.visual.force.com/apex/OpenCTIIndex500#/login>. Copy the following part of the URL: <https://c.na78.visual.force.com/apex/OpenCTIIndex500>.
3. Close the tab and return to **Setup Home > Call Centers** and click **Continue**.

- Next, paste the URL from **OpenCTIIndex** page to **CTI Adapter URL**, then click **Save**.

The screenshot shows the Salesforce Setup interface for the 'Call Centers' section. The left sidebar contains a search bar and a navigation menu with options like 'Feature Settings', 'Service', 'Call Center', 'Call Centers', 'Directory Numbers', and 'Softphone Layouts'. The main content area is titled 'Call Center Edit' and 'Cloud Phone App v2'. It includes a 'General Information' section with fields for 'InternalName' (LightningCallCenterExp), 'Display Name' (Cloud Phone App v2), 'CTI Adapter URL' (https://rcsf1.na35.visual), 'Use CTI API' (true), 'Softphone Height' (450), and 'Softphone Width' (300). A red box highlights the 'CTI Adapter URL' field, and a red arrow points to it from the text 'Paste the CTI Adapter URL here'.

Note: In case you are not using a custom URL, follow the same steps and make sure the Salesforce POD# in Call Center URL (na35 in this example) matches with the Call Center where Salesforce Org resides. Your Salesforce POD# is specified in the browser address bar after you login to Salesforce.



Now you are all set with the rollback.

Q: How do my organization get the ability to Schedule or Start an Instant Office@Hand Video Meetings from SF Global Actions.

A. The feature to schedule or start instant Office@Hand video meetings is available when you install the version 6.9.0 of the integration from AppExchange.

The installation of 6.9.0 will enable buttons in Salesforce Global Actions to schedule and start instant Office@Hand Video for all users independent of them having access to the CTI.

Q: After installation I cannot create the call center from the Office@Hand Admin app.

If the Office@Hand for Salesforce app is installed for the first time, then the Office@Hand Admin app, also known as the install wizard, should provide the option to create the Call Center. If this button to create the call center is disabled or you cannot create see the call center after an upgrade here is a workaround to manually create the call center.

1. Copy the content below into a file and save it as RCCallCenter.xml

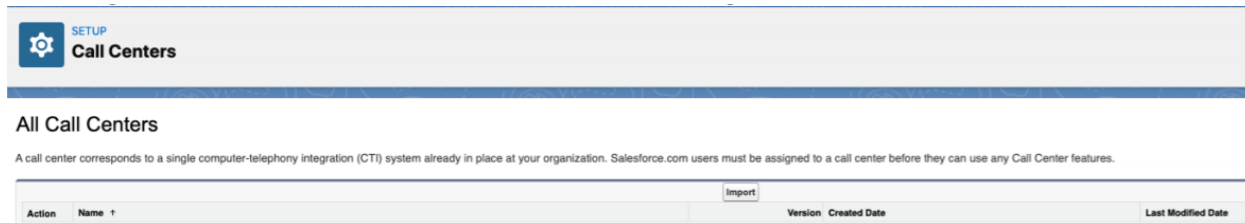
```
<callCenter>
```

```
<section sortOrder="0" name="reqGeneralInfo" label="General Info">
  <item sortOrder="0" name="reqInternalName"
    label="Internal Name">cloudphoneappbyfile</item>
  <item sortOrder="1" name="reqDisplayName"
    label="Display Name">Cloud Phone App Create By File Import</item>
  <item sortOrder="2" name="reqUseApi"
    label="Use CTI API">true</item>
  <item sortOrder="3" name="reqSalesforceCompatibilityMode"
    label="Salesforce Compatibility Mode">Classic_and_Lightning</item>
  <item sortOrder="4" name="reqAdapterUrl"
    label="CTI Adapter URL">https://rcsfl.na75.visual.force.com/apex/OpenCTIIndex
  </item>
  <item sortOrder="5" name="reqSoftphoneHeight"
    label="Softphone Height">546</item>
  <item sortOrder="6" name="reqSoftphoneWidth"
    label="Softphone Width">306</item>
</section>
```

```
<section sortOrder="1" name="DialingOptions" label="Dialing Options">
  <item sortOrder="0" name="OutsidePrefix"
    label="Outside Prefix">1</item>
  <item sortOrder="1" name="LongDistPrefix"
    label="Long Distance Prefix">9</item>
  <item sortOrder="2" name="InternationalPrefix"
    label="International Prefix">01</item>
</section>
```

```
</callCenter>
```

2. Now, navigate to the call center section in the Salesforce admin and click on **Import**.



3. Select the RCCallCenter.xml file. Now, the call center will be created.
4. Go back to the setup section in the guide and continue to add users by clicking on **Manage Call Center Users** and also ensuring that you copy paste the valid **OpenCTI URL** in the call center.