Office@Hand for Salesforce

Admin Guide

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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.

It offers these features:

- **No software to install**—works entirely in the cloud with any Office@Hand device.
- **Works on any computer, any browser**—Access anytime on any PC or Mac.
- **Works with any Salesforce Cloud** – Sales Cloud, Service Cloud, Marketing Cloud—if you've got it, we support it.
- **Easy click-to-dial** by clicking on any phone number in Salesforce.
- **Instant screen pop** displaying the caller's information as soon as a call arrives.
- **New browser tab** for every call enabling multiple interactions at once.
- **Automatic call dispositions** for quick call logging.
- **Accurate call logs** saved to the corresponding record.
- **New records**—Accounts, Contacts, Leads can be easily created while on call.

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 Administrator 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.

Two specific steps are involved:

1. Setting up call center feature of Salesforce.com—required to enable the app for selected users.
2. Setting up SoftPhone Layouts for Salesforce.com—required to enable specific feature behaviors.

Basics

Step 1: Install Office@Hand for Salesforce

Install Office@Hand for Salesforce package from the AppExchange here. Installation of this application requires an administrator login 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 Grant Access to All Users, as this will ensure that Step 2 below will go smoothly; users will not actually have access to Office@Hand for Salesforce until the administrator adds them to the Call Center as detailed below.

Step 2: Add Users to the Call Center

Once you have installed the package from the AppExchange page given in Step 1, you should see a new entry in the Call Center area of Salesforce.com Setup.

Go to Salesforce setup by clicking the setup link that appears on first name last name of the admin user. Navigate to **App Setup > Customize > Call Centers > Call Center**.

Alternately you can search a call center by typing "call center" (without quotes) in the "search All Setup.." text box that appear on Salesforce Setup screen. You should see an entry named Office@Hand Cloud App once you navigate to list of call centers.

Navigate to **App Setup** > **Call Center** > **Customize Call Centers**. You should see an entry named **Office@Hand Cloud App**. (Figure 1)

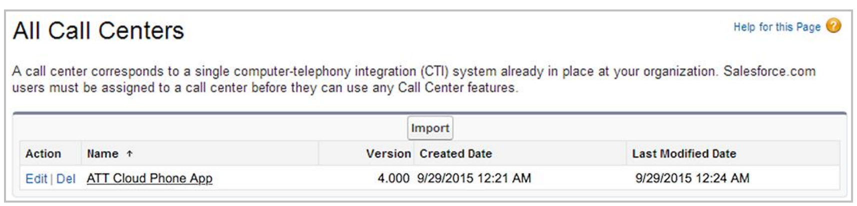


Figure 1

Upon clicking Office@Hand Cloud App, you will see the call center detail screen. 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 (Figures 2 and 3).

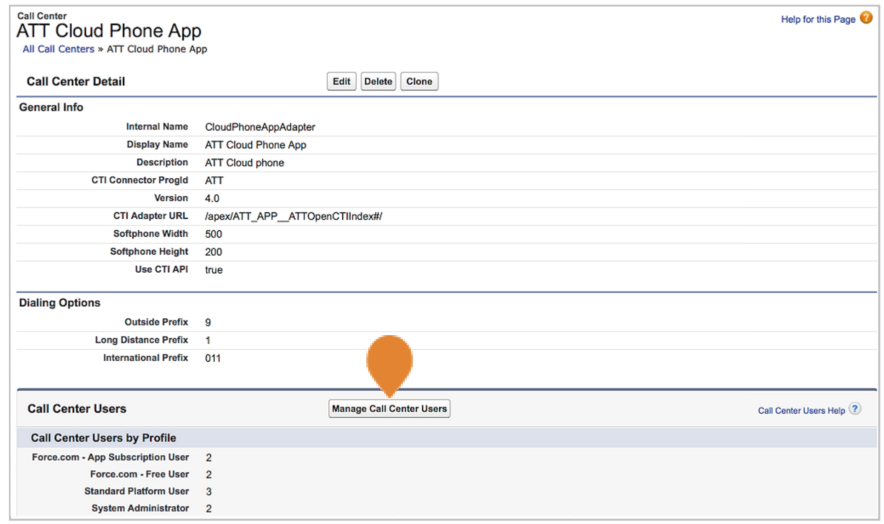


Figure 2

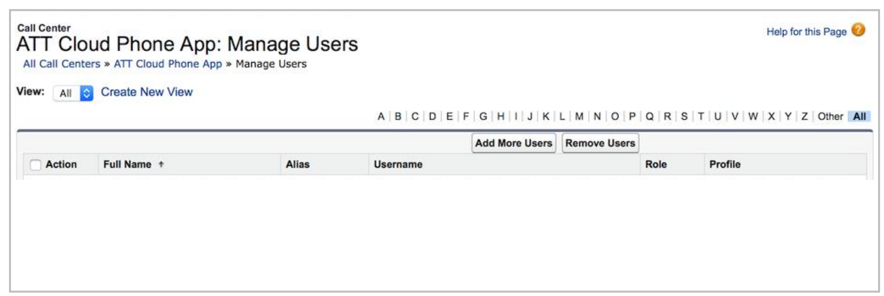


Figure 3

Setting up SoftPhone Layouts in Salesforce

Step 1: Set up a SoftPhone Layout

From the left hand side menu, go to **App Setup** > **Customize** > **Call Center** > **SoftPhone Layouts** and click the **New** button. (Figure 4)

Figure 4

In the **Name** field, fill in **Standard SoftPhone Layout** and select the **Is Default Layout** checkbox if you want this layout to be the default for all users. (Figure 5)

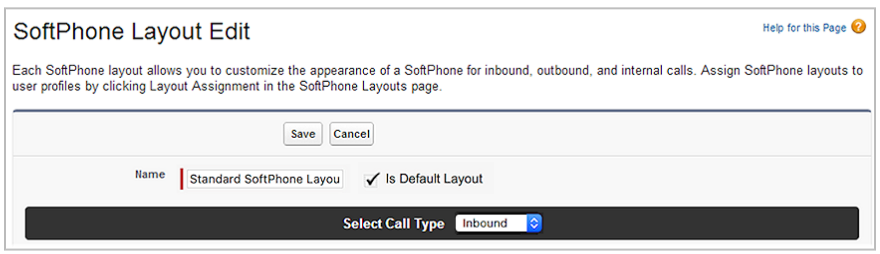


Figure 5

- In the first set in Figure 6, **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.

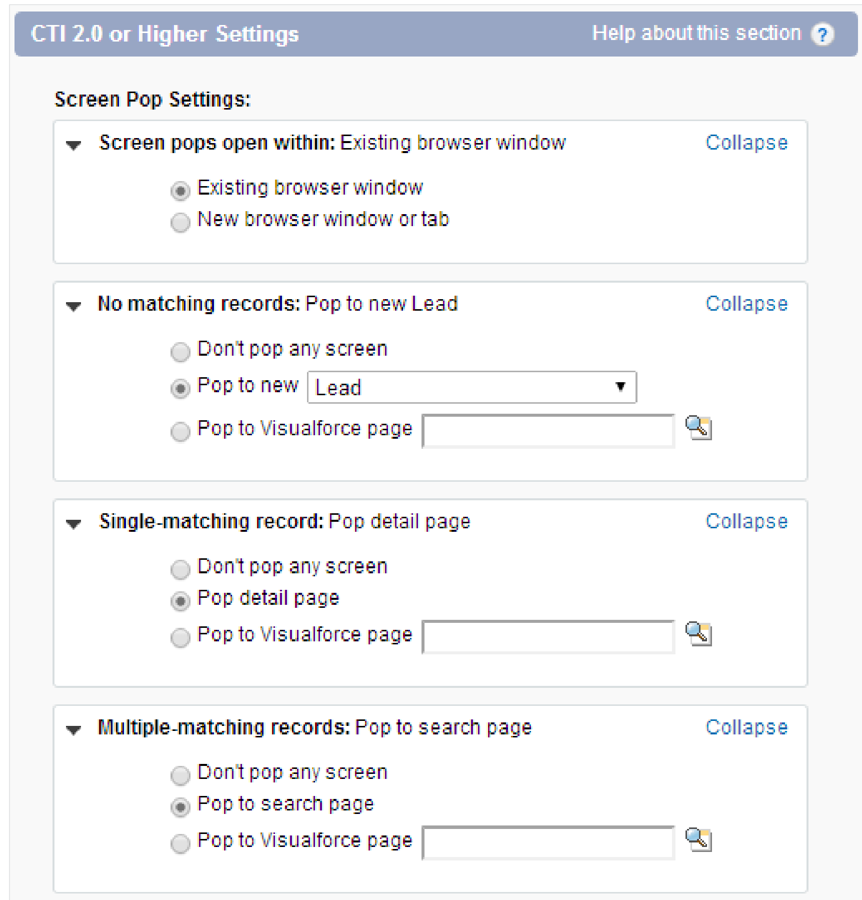


Figure 6

- 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. (Figure 6)
- For the third set **Single-matching record**, select the **Pop detail page** option. (Figure 6)
- For the fourth set **Multiple-matching records**, select the **Pop to search page**. Now click the **Save** button on the top. (Figure 6)

Step 2: Assign the SoftPhone Layout to Users

Back on the **SoftPhone Layouts** page (Figure 7), click the **SoftPhone Layout Assignment**, and assign the SoftPhone Layout to the relevant profiles.

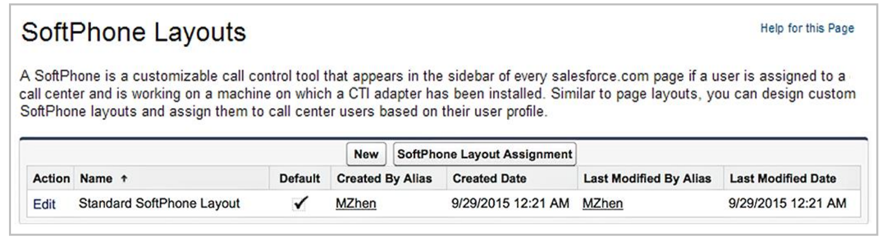


Figure 7

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:

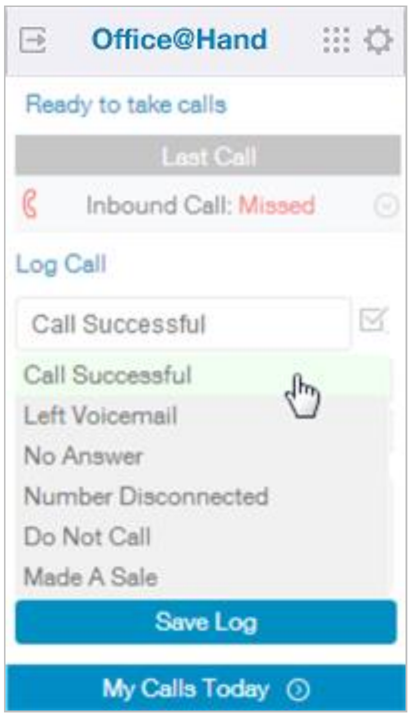


Figure 8

These preset dispositions are gathered from the Subject pick list on the Salesforce.com Task object. To edit these dispositions, navigate to **App Setup > Activities > Task Fields**. On the **Task Fields** page, click the label of the Subject field, and you'll see a page like this:

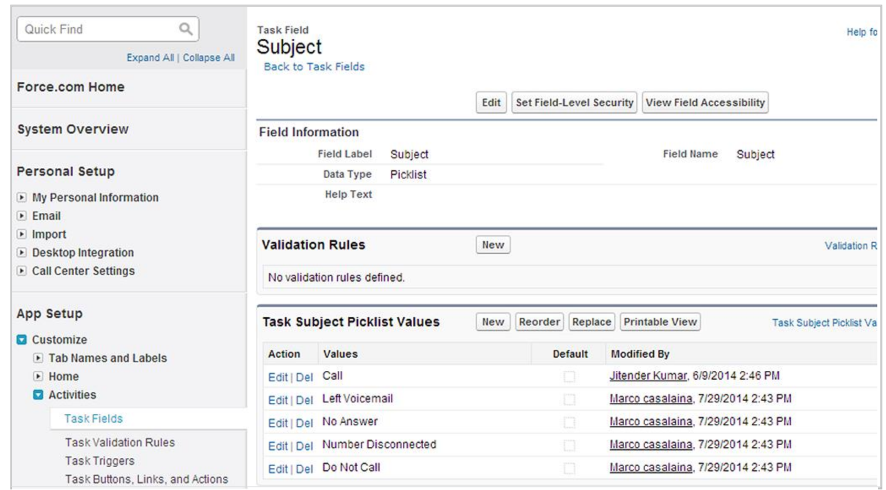


Figure 9

Adding or editing pick list values here will instantly modify the dispositions available to users.

Customize Call Log

Step 1: Add custom fields to Task

From the left-hand side menu, go to **App Setup** > **Customize** > **Activities** > **Activity Custom Fields** and click the **New** button. (Figure 10)

Figure 10

On the **New Custom Field** page select the type of the custom field. Currently the field types supported in the Call Log are Lookup Relationship, Date, Date/Time, Picklist, **Text**, and **Text Area**.

Fill in the information and set field level securities as prompted and select the page layout(s) to add the custom field. Click **Save** button and you should be able to find the custom field under **Activity Custom Fields**.

Step 2: Customize the Call Log fields

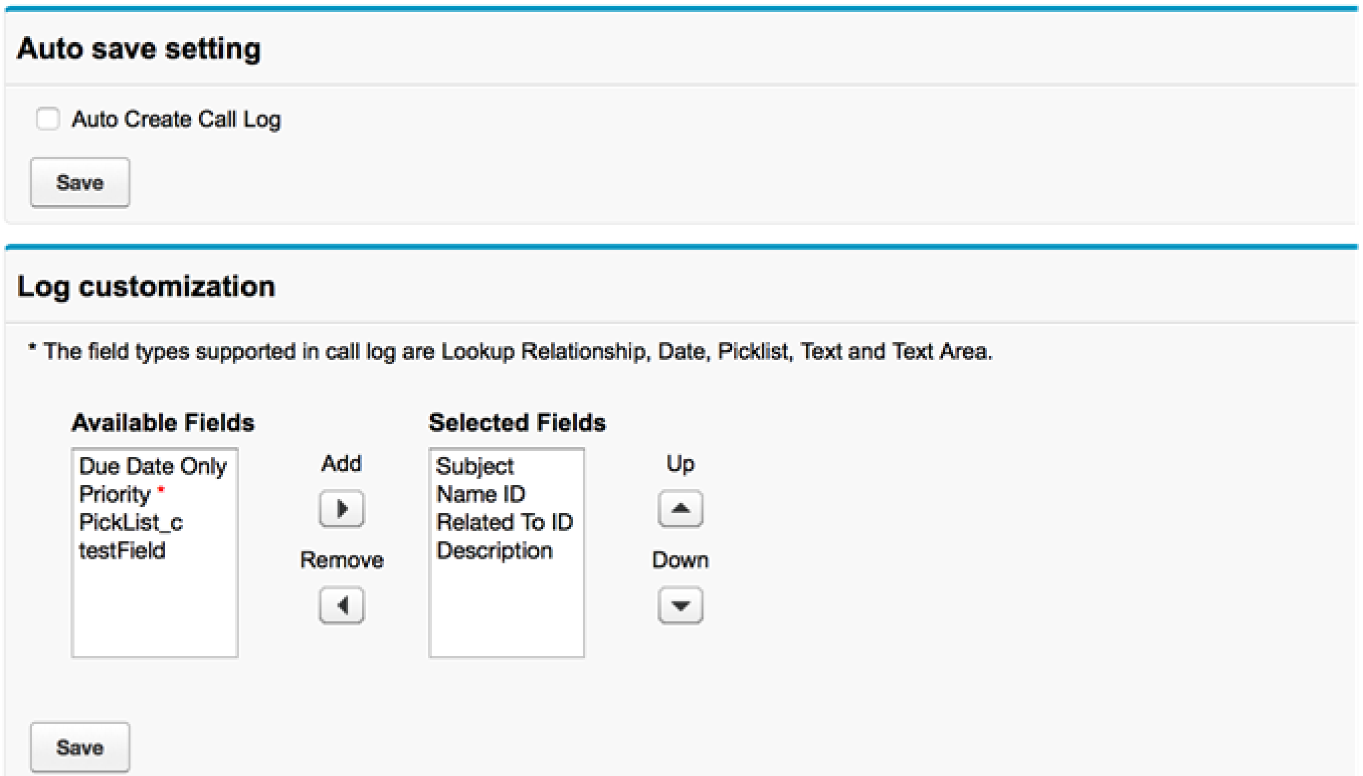
Go to Admin UI page (Figure 11): /apex/ATT_APP__adminUI

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/ATT_APP__adminUI

On AdminUI page 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** button when call log settings are as expected and refresh the page. The call log UI of Office@Hand for Salesforce app should render these fields in the exact order they are listed in the **Selected Fields** box. (Figure 12)



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: I would like to disable this feature for now.

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

A: The following browsers are supported by the App:

- Internet Explorer 11 and higher (Windows XP,7, 8 and higher
- Firefox 37 and higher (Windows, Mac)
- Chrome 41 and higher (Windows, Mac)
- Safari 8 and higher (Mac)

Q: On 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 have the ability to 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 for this profile.

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

A: First, go 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.