

AT&T Office@Hand for Salesforce Classic

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
- Full call history for concurrent and historical calls
- Active call control during the phone call
- Call log notification
- 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, and 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 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** to 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.

 App Gallery

Sign in

[← Back](#)

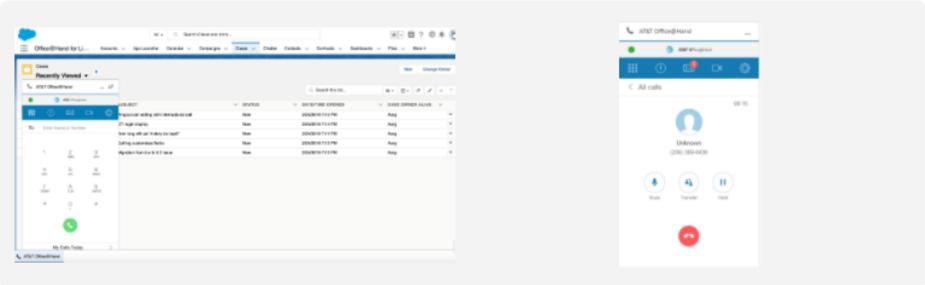


[Visit page to download](#)

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.



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

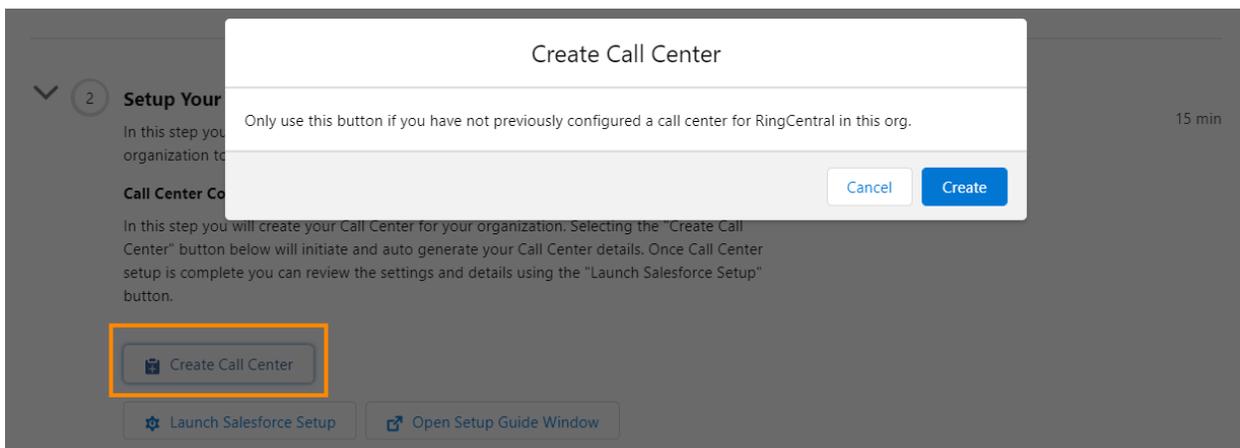
If this is the first time you have installed Office@Hand for Salesforce, you can use the new Install wizard tool to set up & configure the CTI. Please follow the steps below to access the Install wizard and start your setup and configuration.

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

Click on **Office@Hand** to view the Install wizard.

The Install wizard will guide you through all the required steps for configuring the RingCentral 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.



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.

The screenshot displays the 'Call Centers' setup page in Salesforce. At the top, there is a 'SETUP' button and the title 'Call Centers'. Below this, the call center name 'ATT' is shown, along with a breadcrumb 'All Call Centers » ATT'. The 'Call Center Detail' section includes buttons for 'Edit', 'Delete', and 'Clone'. The 'General Information' section contains a table with the following data:

InternalName	ATT
Display Name	ATT
CTI Adapter URL	https://ringcentral-3f-dev-ed--rcsfl.visualforce.com/apex/OpenCTIIndex
Use CTI API	true
Softphone Height	450
Softphone Width	300
Salesforce Compatibility Mode	Classic_and_Lightning

The 'Dialing Options' section contains a table with the following data:

Outside Prefix	9
Long Distance Prefix	1
International Prefix	01

Below the dialing options, there is a 'Call Center Users' section with a 'Manage Call Center Users' button. The 'Call Center Users by Profile' section shows a table with a total of 0 users.

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

Note: The **Create Call Center** option will be disabled during upgrades. It will only be 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

✕
Find

Available Members

Integration User

Security User

▶

◀

Selected Members

Dulcinea D

Save

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.

 [Launch Salesforce Reports](#)

 [Open Setup Guide Window](#)

4. **Add Phone to Apps:** With this step, you can learn how to add Office@Hand to Lightning Apps and 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

 Launch Salesforce Setup

 Open Setup Guide Window

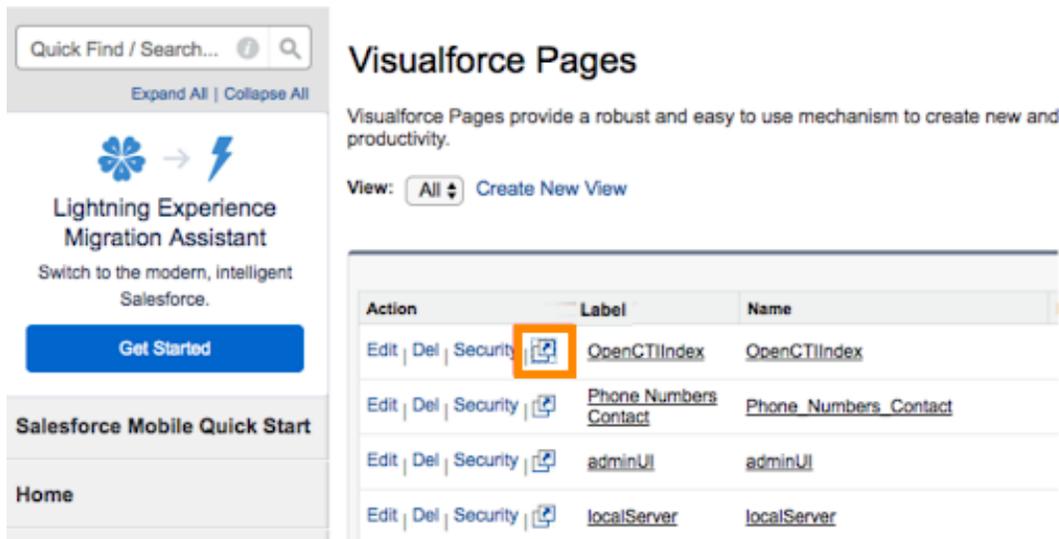
Steps 5 through 7 of the wizard walk you through enabling additional settings such as Mobile experience, Analytics, configuring softphone layout, and Admin settings for the Office@Hand app.

Steps for setup and configurations for an upgrade to a new version

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

Step 2: Configure the Call Center

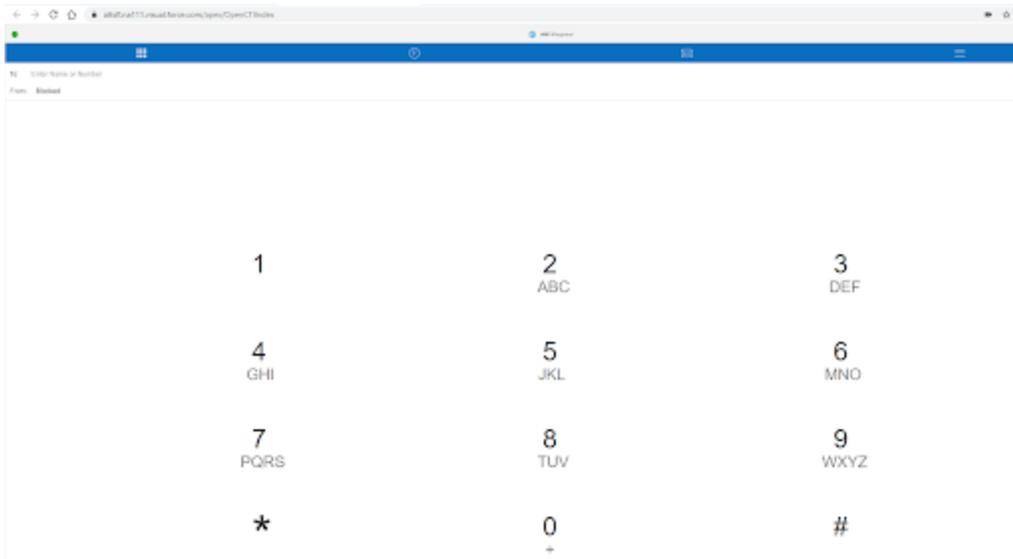
Step 2.1 Navigate to **Setup > Visualforce Pages** and click the **Preview** icon next to the **OpenCTIIndex** page.

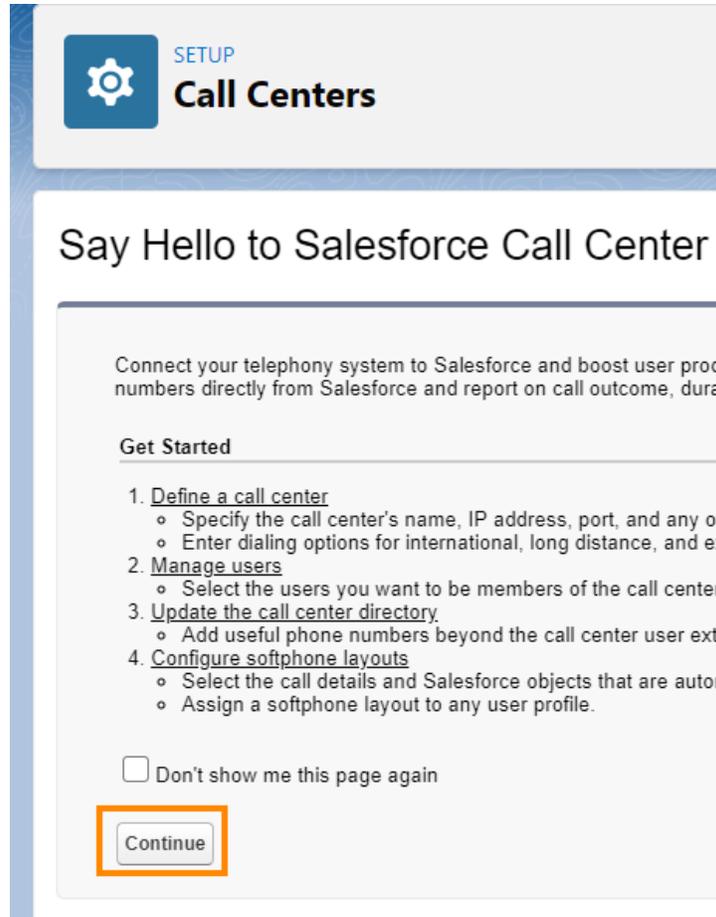


The screenshot shows the Salesforce Visualforce Pages interface. On the left, there is a sidebar with a search bar, 'Expand All | Collapse All' link, and a 'Lightning Experience Migration Assistant' section with a 'Get Started' button. Below that is 'Salesforce Mobile Quick Start' and a 'Home' link. The main content area is titled 'Visualforce Pages' and contains a table of pages. The 'OpenCTIIndex' page is highlighted with a red box, and its 'Preview' icon is also highlighted.

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 > Platform Tools > Feature Settings > Service > Call Center > Call Centers** and click **Continue**.





Select the name of the call center you previously set up and click **Edit**.

All Call Centers

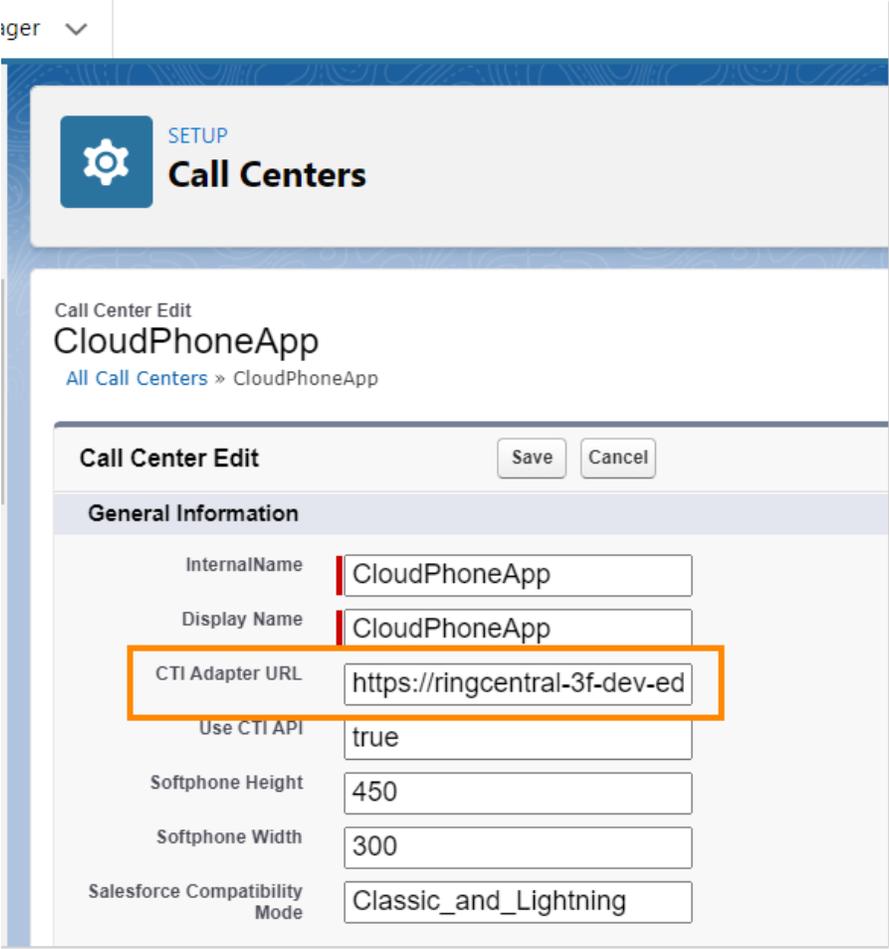
A call center corresponds to a single computer-telephony integration. You can enable any Call Center features.

Action	Name ↑
Edit Del Alt	

Note: If there is no call center, refer to the Troubleshooting section to manually create the Call Center.

Step 2.2 Paste the URL from the **OpenCTIIndex** page to **CTI Adapter URL**, then click **Save**.

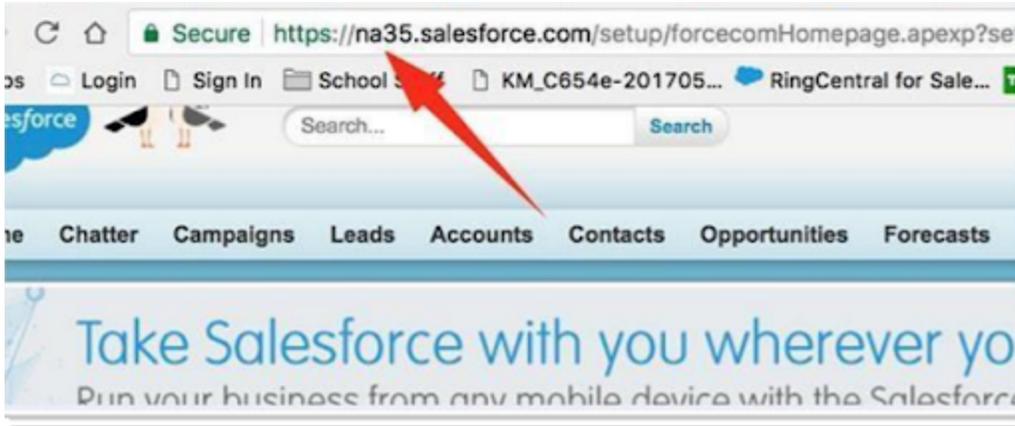
Navigate to **Setup Home > Call Centers**, select the call center **CloudPhoneApp v2** and click **Edit**. Paste the URL from the **OpenCTIIndex** page to the **CTI AdapterURL**, then click **Save**.



The screenshot shows the 'Call Center Edit' page for 'CloudPhoneApp'. The page includes a 'Save' button and a 'Cancel' button. The 'General Information' section contains the following fields:

Field Name	Value
InternalName	CloudPhoneApp
Display Name	CloudPhoneApp
CTI Adapter URL	https://ringcentral-3f-dev-ed
Use CTI API	true
Softphone Height	450
Softphone Width	300
Salesforce Compatibility Mode	Classic_and_Lightning

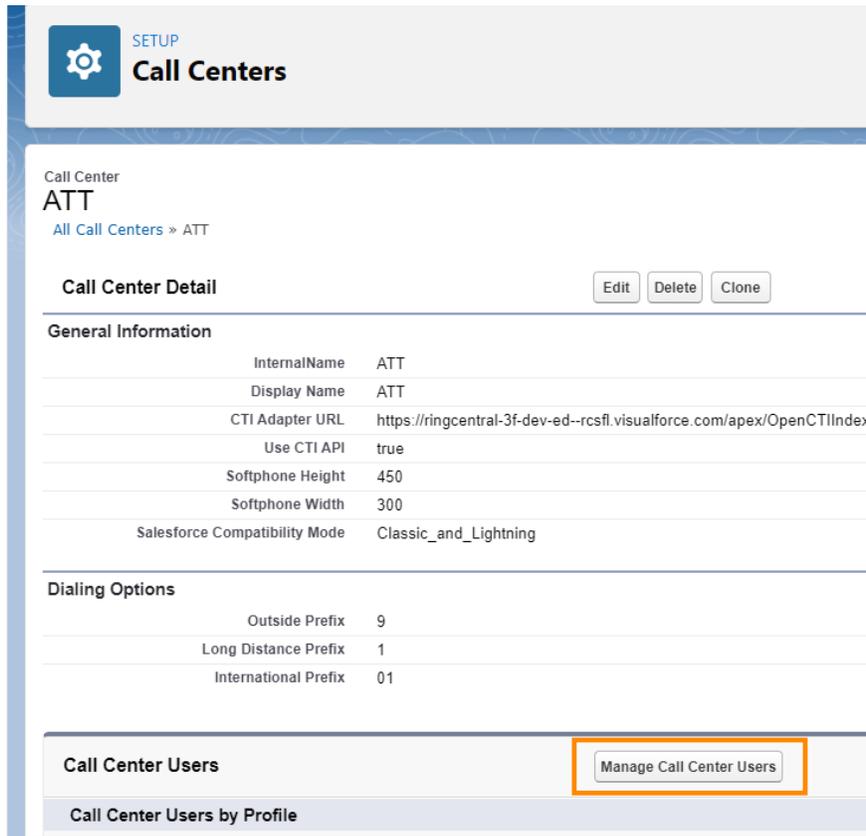
If you are not using a custom URL, follow the same steps and make sure the Salesforce POD# in the Call Center URL, **na35** in this example, mates with Call Center where Salesforce Org resides. Your Salesforce POD# is specified in the browser address bar after your login to Salesforce.



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

Step 3: Add Users to the Call Center

From here, you can add users to this Call Center using the **Manage Call Center Users** button, which opens the **Manage Users** screen.



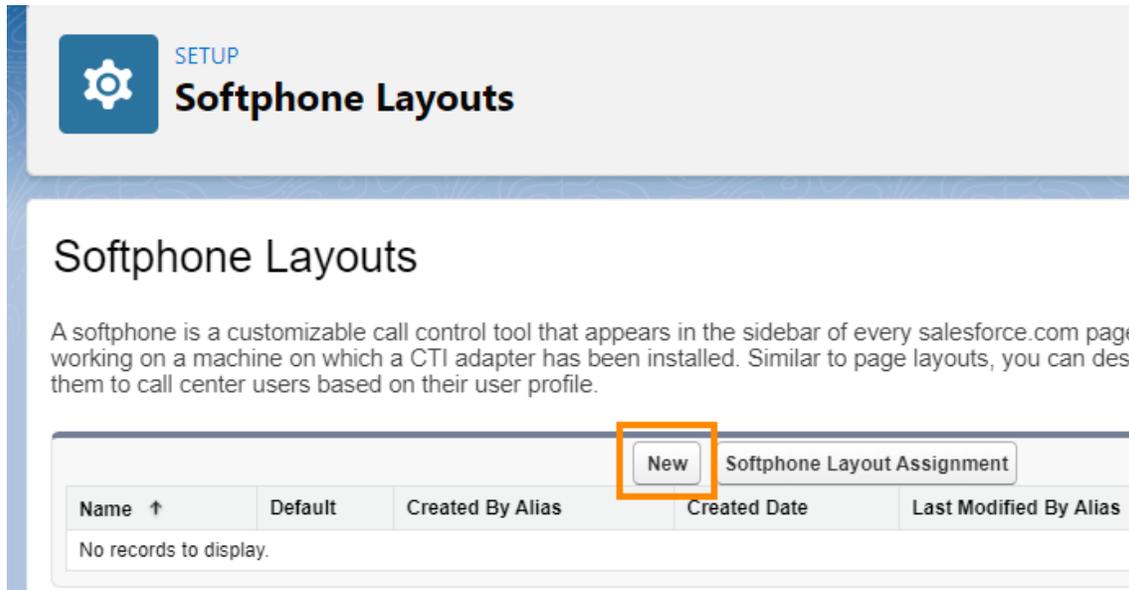
Note: If your users are added to another call center already, please first remove them from that call center before you try to add them in this call center.

The screenshot shows the Salesforce Admin interface for managing call center users. At the top, there is a header with a gear icon, the word 'SETUP', and 'Call Centers'. Below this, the page title is 'Call Center' followed by 'ATT: Manage Users'. A breadcrumb trail reads 'All Call Centers » ATT » Manage Users'. There is a 'View:' dropdown menu set to 'All' and a link for 'Create New View'. On the right side, there are 'A' and 'B' sorting options. Below the header, there are two buttons: 'Add More Users' (highlighted with an orange box) and 'Remove Users'. At the bottom, a table header is visible with columns for 'Full Name ↑', 'Alias', and 'Username'.

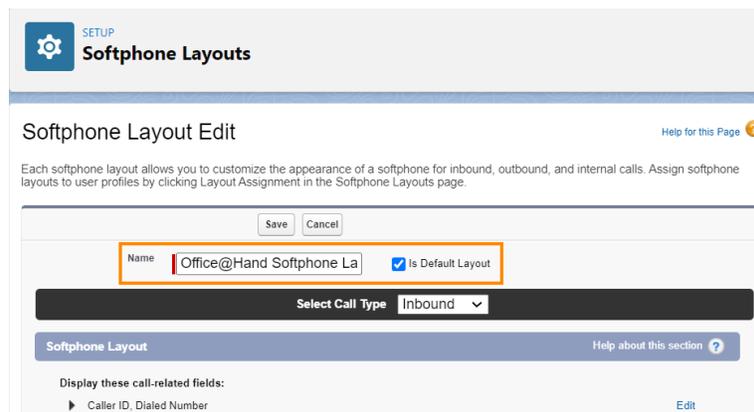
Setting up SoftPhone Layouts in Salesforce

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.

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, then select the appropriate object you would like to be created.
- 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.

Screen Pop Settings Help about this section ?

Screen pops open within: New browser window or tab Collapse

Existing browser window
 New browser window or tab

No matching records: Pop to new Contact Collapse

Don't pop any screen
 Pop to new 
 Pop to Visualforce page
 Pop to flow 

Single-matching record: Pop detail page Collapse

Don't pop any screen
 Pop detail page
 Pop to Visualforce page
 Pop to flow 

Multiple-matching records: Pop to search page Collapse

Don't pop any screen
 Pop to search page
 Pop to Visualforce page
 Pop to flow 

SETUP
Softphone Layouts

Softphone Layout Edit

[Help for this Page](#)

Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layouts to user profiles by clicking Layout Assignment in the Softphone Layouts page.

Save **Cancel**

Name Is Default Layout

Select Call Type

Softphone Layout

[Help about this section](#)

Display these call-related fields:

- ▶ Caller ID, Dialed Number [Edit](#)

Display these salesforce.com objects:

- ▶ Account, Contact, Lead [Add / Remove Objects](#)

▶ **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. [Edit](#)

Step 2: Assign the SoftPhone Layout to Users

On the **SoftPhone Layouts** page, click **SoftPhone Layout Assignment**, and assign the SoftPhone Layout to the relevant profiles. Click **Save**.

SETUP
Softphone Layouts

Softphone Layouts

A softphone is a customizable call control tool that appears in the sidebar of every salesforce.com page if a user is working on a machine on which a CTI adapter has been installed. Similar to page layouts, you can design softphone layouts to call center users based on their user profile.

New **Softphone Layout Assignment**

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

 **SETUP**
Softphone Layouts

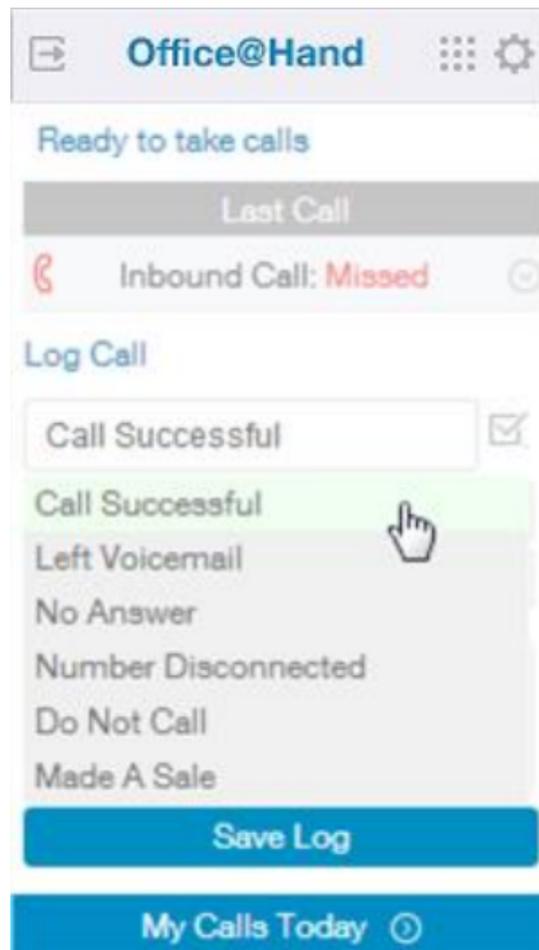
Softphone Layout Assignment

Assign a softphone layout to each profile in the list below. Only profiles that include call been assigned are displayed.

Profile	
System Administrator (1)	<div style="border: 1px solid #ccc; padding: 2px;"><div style="border-bottom: 1px solid #ccc; padding: 2px;">-- Default --</div><div style="padding: 2px;">-- Default --</div><div style="padding: 2px; background-color: #0070c0; color: white;">Office@Hand Softphone Layout</div></div>

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:



These preset dispositions are gathered from the Subject picklist on the Salesforce.com Task object. To edit these dispositions:

1. Navigate to **App Setup > Activities > Task Fields**.
2. Click **New** beside **Task Subject Picklist Values**.
3. Enter a name for the new Disposition.
4. Click **Save**.

Task Field
Subject
[Back to Task Fields](#)

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	Subject	Field Name	Subject
Data Type	Picklist		
Help Text			
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Picklist Values Used

Active picklist values	5 (1,000 max)
Inactive picklist values	0

Validation Rules [New](#)

No validation rules defined.

Task Subject Picklist Values [New](#) [Reorder](#) [Replace](#) [Printable View](#)

Action	Values	API Name	Default	Modified By
Edit Del Deactivate	Call	Call	<input type="checkbox"/>	Dulcinea D. 8/5/2021, 1:09 PM
Edit Del Deactivate	Email	Email	<input type="checkbox"/>	Dulcinea D. 8/5/2021, 1:09 PM
Edit Del Deactivate	Send Letter	Send Letter	<input type="checkbox"/>	Dulcinea D. 8/5/2021, 1:09 PM
Edit Del Deactivate	Send Quote	Send Quote	<input type="checkbox"/>	Dulcinea D. 8/5/2021, 1:09 PM
Edit Del Deactivate	Other	Other	<input type="checkbox"/>	Dulcinea D. 8/5/2021, 1:09 PM

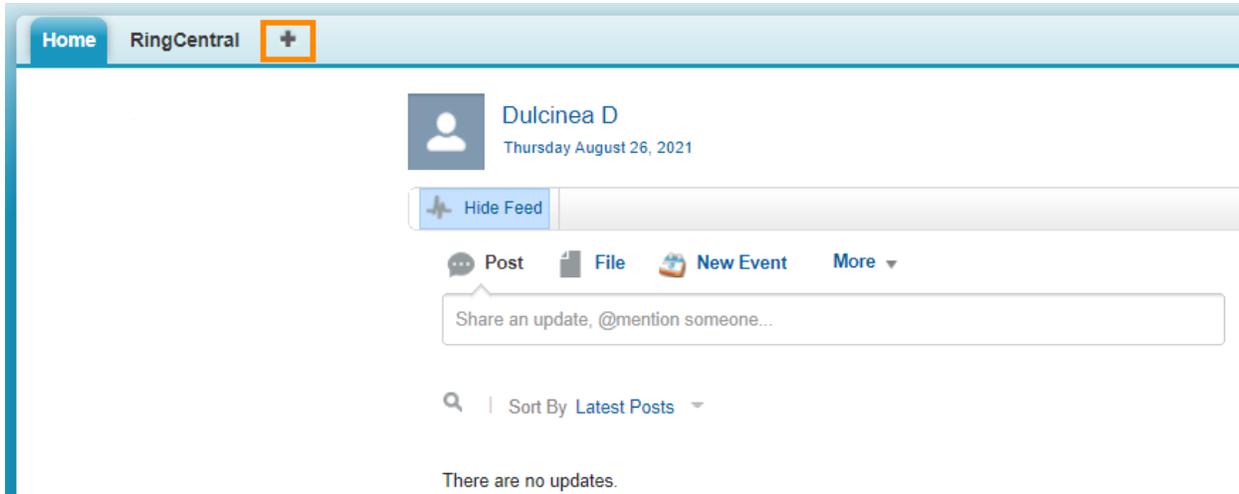
Inactive Values

No Inactive Values values defined.

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

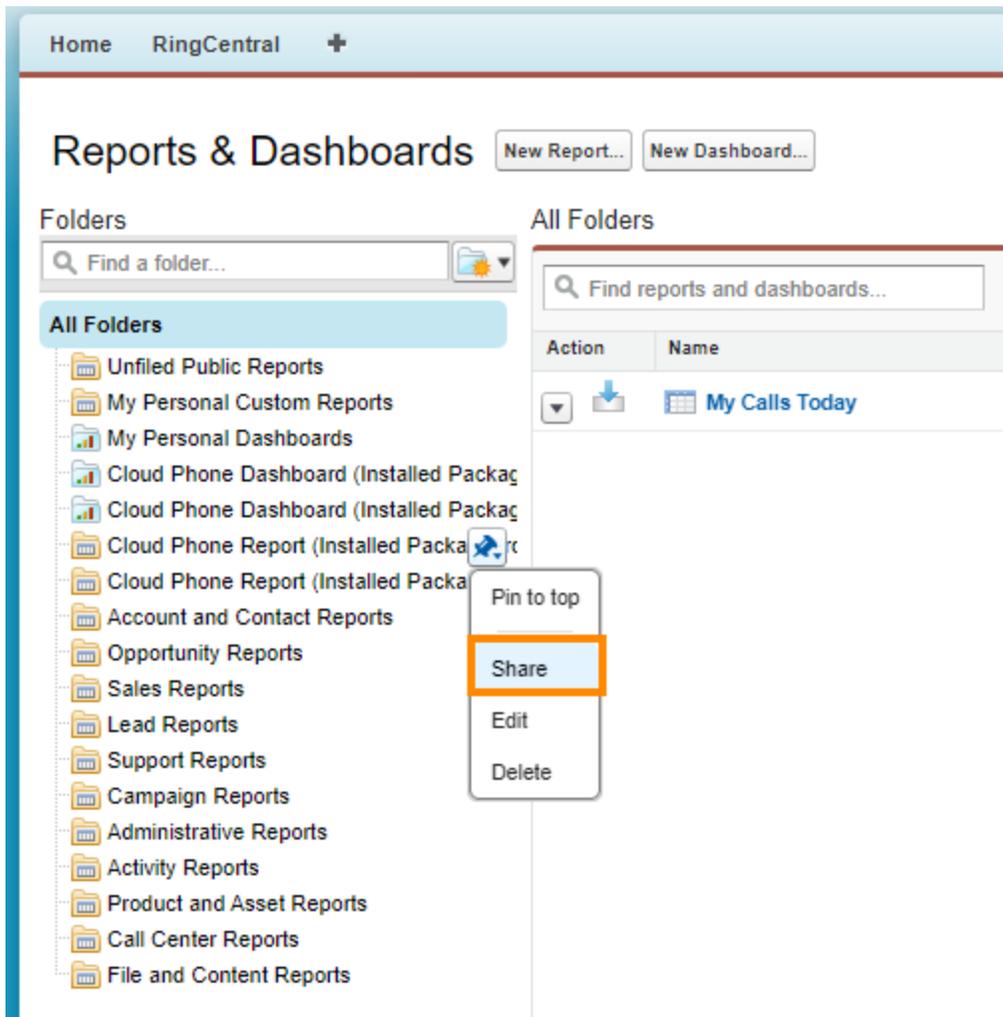
Sharing Reports folder with users

To share a report with users, click the **All Tabs** plus sign, then click on **Reports**.



 Assets	 List Emails
 Asset State Periods	 Locations
 Authorization Form	 Macros
 Authorization Form Consent	 Operating Hours
 Authorization Form Data Use	 Opportunities
 Authorization Form Text	 Orders
 Campaigns <small>Tell me more!</small>	 Party Consent
 Card Payment Methods	 Payment Authorization Adjustments
 Cases	 Payment Authorizations
 Chatter	 Payment Gateway Logs
 Communication Subscription Channel Types	 Payment Gateways
 Communication Subscription Consents	 Payment Line Invoices
 Communication Subscriptions	 Payments
 Communication Subscription Timings	 People
 Consumption Schedules	 Price Books
 Contact Point Consent	 Process Exceptions
 Contact Point Type Consent	 Products
 Contact Requests	 Profile
 Contacts	 Profile Feed
 Content	 Profile Overview
 Contracts	 Recommendations
 Contribute	 Refund Line Payments
 Credit Memos	 Refunds
 D&B Companies	 Reports

Find and hover over the **Cloud Phone Report** folder in the report folders list and click the **Pin** icon next to it. Select *Share*.



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

Admin UI

AdminUI is a VisualForce page created for you to do organization-side settings for your Office@Hand for Salesforce app as an account administrator. The page URL is: /apex/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 might be prompted after you enter the URL to click **Initial** to go to the AdminUI.

Cloud Phone Settings

Auto Save Setting

Pop matching Salesforce entity record on call

Auto create call log on

Save

Associate Call/SMS Log with Person Account

Associate call/SMS log with Person Accounts using field.

Save

Log Customization

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

Available Fields

Add

Remove

Selected Fields

Subject	Up
Name ID	<input type="button" value="▲"/>
Related To ID	
Description	Down
Priority *	<input type="button" value="▼"/>
Plist *	
TextArea *	

Save

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 determine whether or not to auto-create call logs and when to log them. This setting will override the settings the user does on the **app > Settings** page.
- **Log Customization:** Add/remove call log fields using the left/right arrows and order the selected call log fields 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**.

- **Person Account Settings:** You are able to configure person account settings in the **Associate calls with person account** section on the **adminUI** page. This section is hidden by default. If you want to show it, you're 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.

Quick Find / Search... [Expand All](#) | [Collapse All](#)

Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
[Get Started](#)

Salesforce Mobile Quick Start

Home

Administer

- Release Updates
- [Manage Users](#)
- [Manage Apps](#)
- [Manage Territories](#)
- [Company Profile](#)
 - [Company Information](#)
 - Fiscal Year
 - Business Hours
 - Holidays
 - Language Settings

Company Information
ATT [Help for this Page](#)

The organization's profile is below.

[User Licenses \(10+\)](#) | [Permission Set Licenses \(10+\)](#) | [Feature Licenses \(11\)](#) | [Usage-based Entitlements \(10\)](#)

Organization Detail [Edit](#) [Deactivate Org](#)

Organization Name	ATT	Phone	
Primary Contact	Dulcinea D	Fax	
Division		Default Locale	English (United States)
Address	USA	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Activate Multiple Currencies	<input type="checkbox"/>	Improve DATEVALUE() accuracy for DST	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Newsletter	<input checked="" type="checkbox"/>	Used Data Space	298 KB (6%) View
Admin Newsletter	<input checked="" type="checkbox"/>	Used File Space	13 KB (0%) View
Hide Notices About System Maintenance	<input type="checkbox"/>	API Requests, Last 24 Hours	2 (15,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
		Restricted Logins, Current Month	0 (0 max)
		Salesforce.com Organization ID	00D5g0000096tvi
		Organization Edition	Developer Edition
		Instance	AP24
Created By	Dulcinea D , 8/5/2021, 1:09 PM	Modified By	Dulcinea D , 8/27/2021, 4:51 AM

[Edit](#) [Deactivate Org](#)

Call Recording

To allow users in your organization to access their Office@Hand call recordings from within Salesforce, navigate to **Setup > Customize > Activities > Task Page Layout** and click **Edit** for the page layout you want to configure. Move the **Call Recording** field to the **Task Detail** section.

The screenshot shows the Salesforce Admin interface for configuring a Task Page Layout. The 'Fields' list on the left includes 'Call Recording'. The 'Task Detail' section is visible, showing a list of fields to be added. An orange arrow points from the 'Call Recording' field in the 'Fields' list to the 'Task Detail' section.

Fields List:

Section	Field Name	Field Type
Section	CALL_UNIQUE_ID	Call Object Ident...
Blank Space	CALL_UUID	Call Recording
Assigned To	CALL_UUID	Call Recording

Task Detail Section:

Standard Buttons: Change Record Type, Printable View, Edit, Delete, Delete Series, View Series
Create Follow-Up Task, Create Follow-Up Event

Custom Buttons: [Empty]

Task Information (Header visible on edit only)

Assigned To	Sample Text	Status	Sample Text
Subject	Sample Text	Name	Sample Text
Due Date	8/24/2021, 7:23 AM	Related To	Sample Text
Phone	1-415-555-1212	Email	sarah.sample@company.com
Priority	Sample Text		

Other Information (Header visible on edit only)

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**.

SETUP Roles

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies: ▼

Executive Staff
CEO President CFO VP, Sales

- * View & edit data, roll up forecasts, & generate reports for all users below
- * Can't access data of other Executive Staff

Western Sales Director
Director of W. Sales

Eastern Sales Director
Director of E. Sales

International Sales Director
Director of Int'l Sales

- * View & edit data, roll up forecasts, & generate reports for all users directly below
- * Can't access data of users above or at same level

Western Sales Rep
CA Sales Rep
OR Sales Rep

Eastern Sales Rep
NY Sales Rep
MA Sales Rep

International Sales Rep
Asian Sales Rep
European Sales Rep

- * View & edit data, roll up forecasts, & generate reports only for own data
- * Can't access data of users above or at same level

Set Up Roles

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

SETUP Users

All Users Help for this Page ?

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](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

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

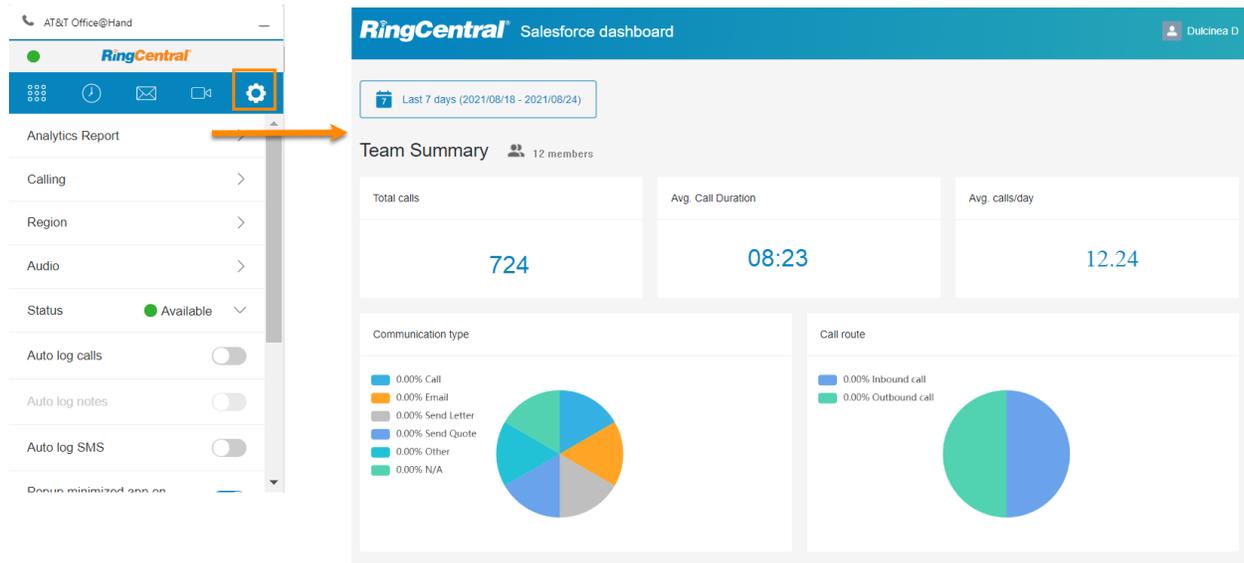
<input type="checkbox"/> Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
<input type="checkbox"/> Edit	User, Integration	integ	integration@00d5g0000096tveaa.com			✓	Analytics Cloud Integration User	
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5g0000096tveaa.i2e6hsby0zwn@chatter.salesforce.com			✓	Chatter Free User	
<input type="checkbox"/> Edit	User, Security	sec	insightssecurity.@00d5g0000096tveaa.com			✓	Analytics Cloud Security User	
<input type="checkbox"/> Edit	D. Dulcinea	dulcinea		8/24/2021, 6:04 AM	Manager	✓	System Administrator	

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

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Entry for Analytics Report

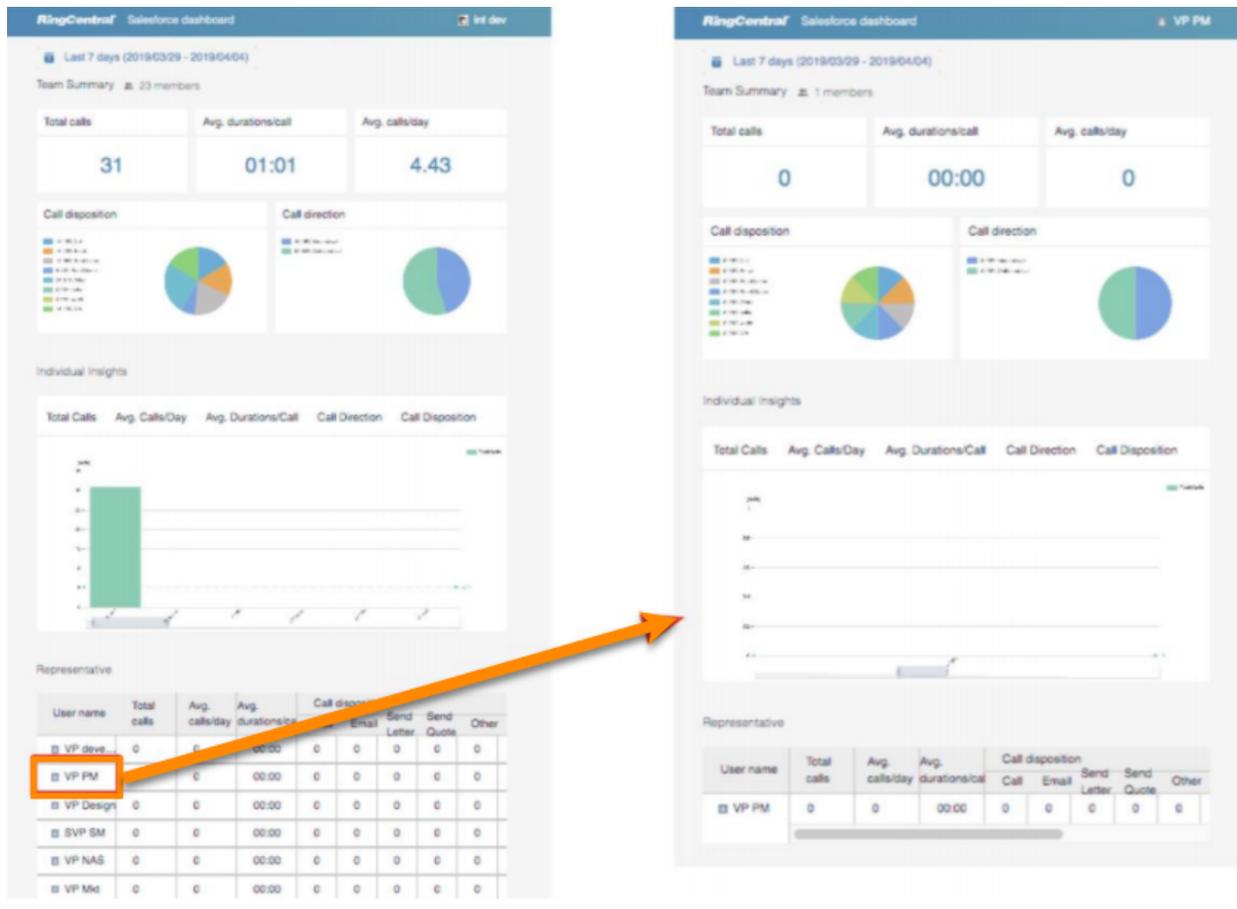
Analytics Report is available under the **Settings** menu. If you have not set up the role hierarchy, it only shows your individual data for the signed in account. If role hierarchy is enabled, it shows the data for all the team members.



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.



Adding Office@Hand Call and SMS options to Salesforce1

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**.

Buttons, Links, and Actions

[Help for this Page](#) ?

Account

Use this page to manage buttons, links, and actions.

Buttons, Links, and Actions							
		New Action	New Button or Link	Default Custom Links		Buttons, Links, and Actions Help ?	
Action	Label	Name	Description	Type	Content Source	Icon	Overridden
Edit	Accounts Tab	Tab			Standard page		<input type="checkbox"/>
Edit	Add Contacts To Campaign	AccountAddToCampaign			Standard page		<input type="checkbox"/>
Edit	Add to Call List	MassCreateCallList			Standard page		<input type="checkbox"/>
Edit	Add to Call List	CreateCallList			Standard page		<input type="checkbox"/>
Edit Del	Billing	Billing		Detail Page Link	URL		<input type="checkbox"/>
Edit	 Call_with_RingCentral	Call_with_RingCentral		Custom Visualforce	Phone Numbers Account (Visualforce)		<input type="checkbox"/>
Edit	 Call_with_Office@Hand	Call_with_Office_Hand		Custom Visualforce	Phone Numbers Account (Visualforce)		<input type="checkbox"/>
Edit Del	Call_with_Office@Hand	Call_with_Office_Hand		Custom Visualforce	Phone Numbers Account (Visualforce)		<input type="checkbox"/>
Edit	Check for New Data	XClean			Standard page		<input type="checkbox"/>
Edit	Clean	ListClean			Standard page		<input type="checkbox"/>
Edit	Delete	Delete			Standard page		<input type="checkbox"/>
Edit	Discover Companies	DiscoveryGetAccountsAction			Standard page		<input type="checkbox"/>

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**.

Account Actions
New Action

Enter Action Information Save Cancel

Object Name i

Action Type v

Visualforce Page v
i

Height i

Standard Label Type v i

Label

Name i

Description

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**.

Account Actions
New Action

Enter Action Information Save Cancel

Object Name i

Action Type v

Visualforce Page v
i

Height i

Standard Label Type v i

Label

Name i

Description i

Icon  [Change Icon](#)

Save Cancel

Adding Actions to Salesforce

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

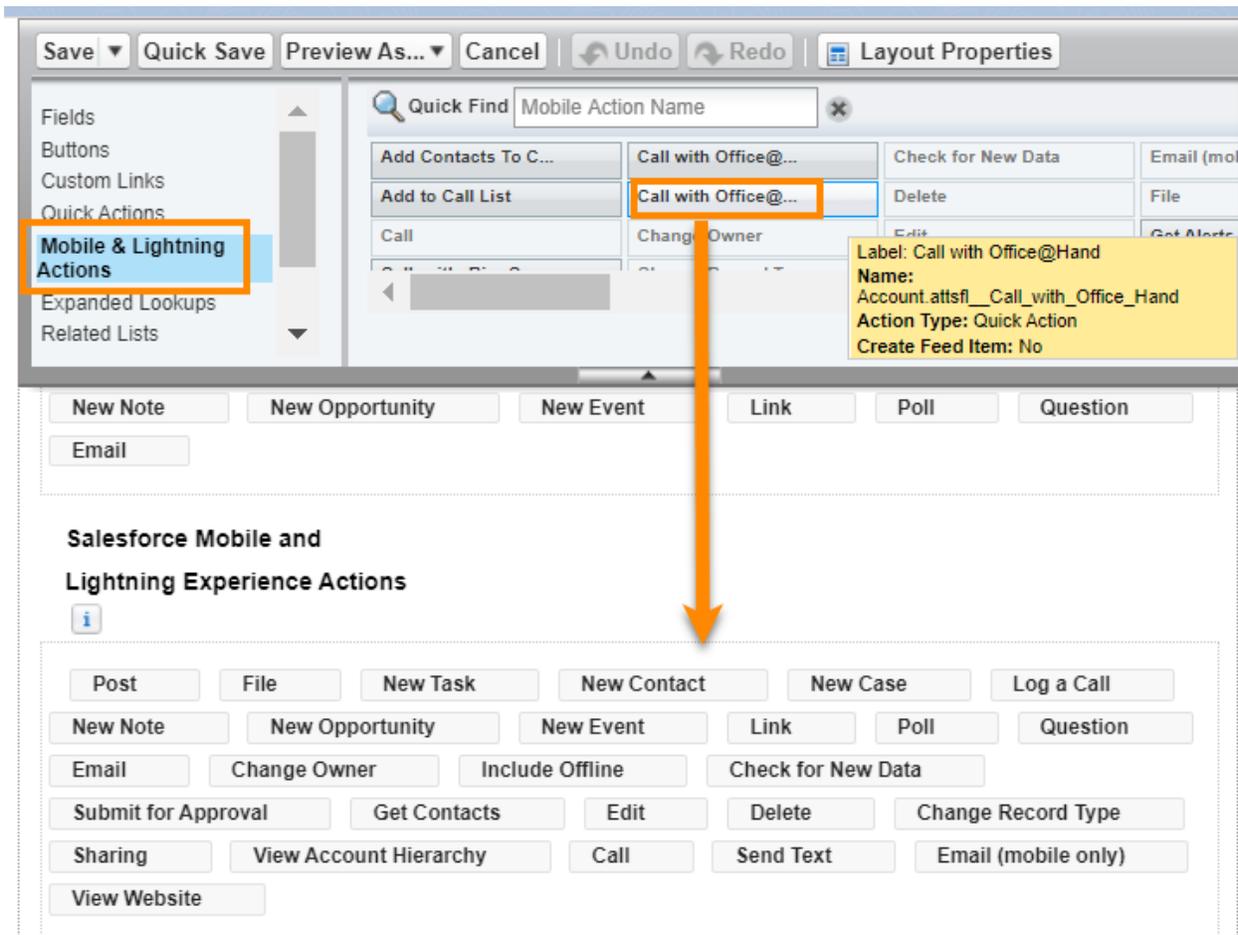
Account Page Layout

[Help for this Page](#) 

This page allows you to create different page layouts to display Account data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Account Page Layouts				
		New	Page Layout Assignment	
Action	Page Layout Name	Created By	Modified By	Feed-Based Layout
Edit Del	Account (Marketing) Layout	Dulcinea D. 8/5/2021, 1:09 PM	Dulcinea D. 8/5/2021, 1:09 PM	<input type="checkbox"/>
Edit Del	Account (Sales) Layout	Dulcinea D. 8/5/2021, 1:09 PM	Dulcinea D. 8/5/2021, 1:09 PM	<input type="checkbox"/>
Edit Del	Account (Support) Layout	Dulcinea D. 8/5/2021, 1:09 PM	Dulcinea D. 8/5/2021, 1:09 PM	<input type="checkbox"/>
Edit Del	Account Layout	Dulcinea D. 8/5/2021, 1:09 PM	Dulcinea D. 8/24/2021, 8:17 AM	<input type="checkbox"/>

Click **Mobile & Lightning Actions** on the left-hand menu, then drag the actions **Call with Office@Hand** and **SMS with Office@Hand** to the **Salesforce Mobile and Lightning Experience Actions** section. Click **Save**.



Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields Buttons Custom Links Quick Actions **Mobile & Lightning Actions** Expanded Lookups Related Lists

Quick Find Mobile Action Name

Schedule Appointment	Sharing	SMS with RingCentral
Schedule AT&T Off...	Sharing Hierarchy	Start AT&T Office...
Schedule RingCent...	SMS with Office@Hand	Start RingCentral...

Label: SMS with Office@Hand
Name: Account.SMS_with_Office_Hand
Action Type: Quick Action
Create Feed Item: No

New Note New Opportunity New Event Link Poll Question
Email

Salesforce Mobile and Lightning Experience Actions

Post File New Task New Contact New Case Log a Call
New Note New Opportunity New Event Link Poll Question
Email Change Owner Include Offline Check for New Data
Submit for Approval Get Contacts Edit Delete Change Record Type
Sharing View Account Hierarchy Call Send Text Email (mobile only)
View Website

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 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 the 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?

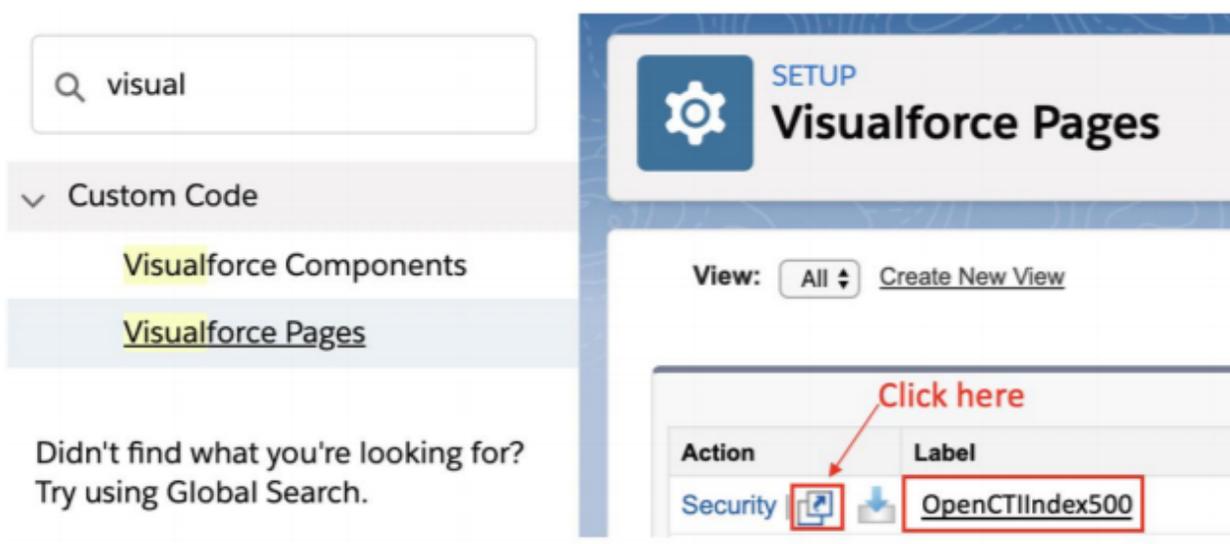
A: First, navigate to **App Setup > Call Center > Customize Call Centers** and verify that the CTI Adapter URL is pointing at: `/apex/Office@Hand.OpenCTIIndex#`

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.

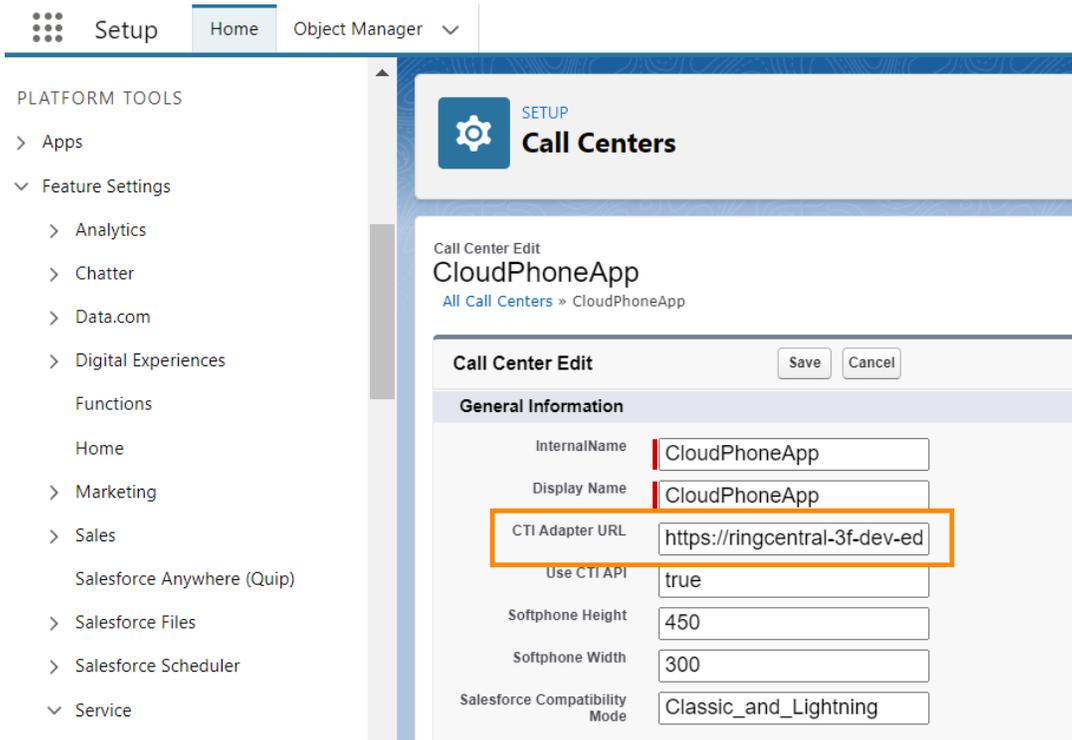
A: You can roll back to the previous version by following the steps below.

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



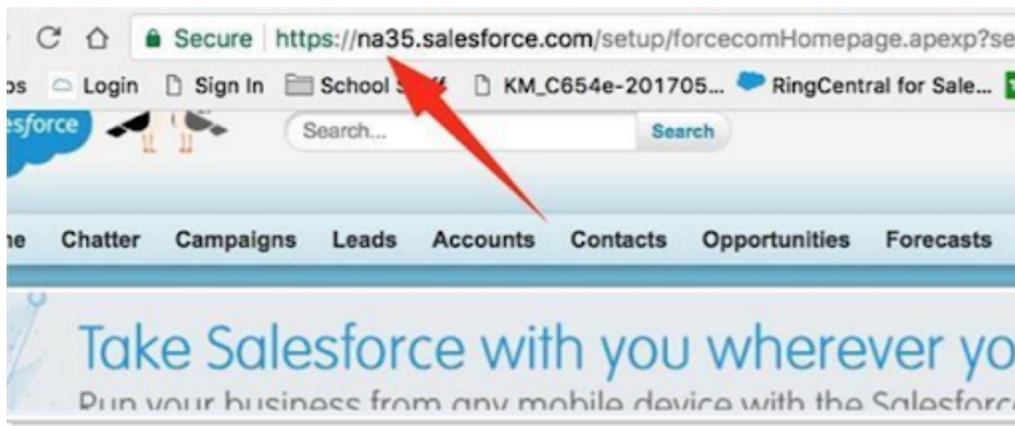
2. After the page opens in a new tab or window, copy its URL. For example, the full URL is <https://c.na78.visual.force.com/apex/OpenCTIIndex500#/login>. Copy the following part of the URL: <https://c.na78.visual.force.com/apex/OpenCTIIndex500>.
3. Close the tab and return to **Setup Home > Call Centers**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

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



The screenshot shows the Salesforce Setup interface. The left sidebar contains the 'Setup' menu with 'Home' selected. The main content area is titled 'Call Centers' and shows the 'Call Center Edit' form for 'CloudPhoneApp'. The form includes fields for 'Internal Name', 'Display Name', 'CTI Adapter URL', 'Use CTI API', 'Softphone Height', 'Softphone Width', and 'Salesforce Compatibility Mode'. The 'CTI Adapter URL' field is highlighted with an orange border and contains the text 'https://ringcentral-3f-dev-ed'. The 'Save' and 'Cancel' buttons are visible at the top right of the form.

Note: If 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.



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 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 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>
```

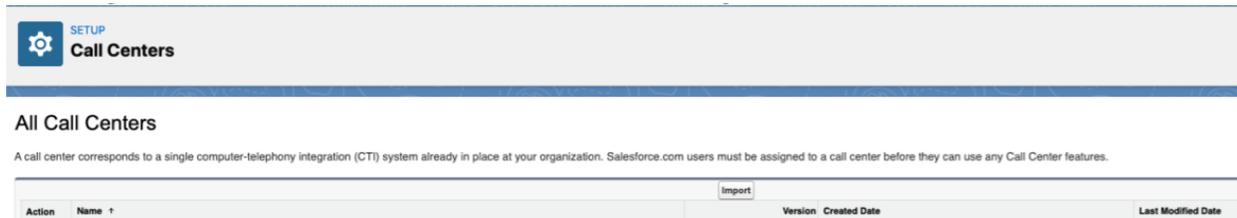
```
<section sortOrder="0" name="reqGeneralInfo" label="General Info">
  <item sortOrder="0" name="reqInternalName"
    label="Internal Name">cloudphoneappbyfile</item>
  <item sortOrder="1" name="reqDisplayName"
    label="Display Name">Cloud Phone App Create By File Import</item>
  <item sortOrder="2" 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**, ensuring you copy-paste the valid **OpenCTI URL** in the call center.