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 Offce@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

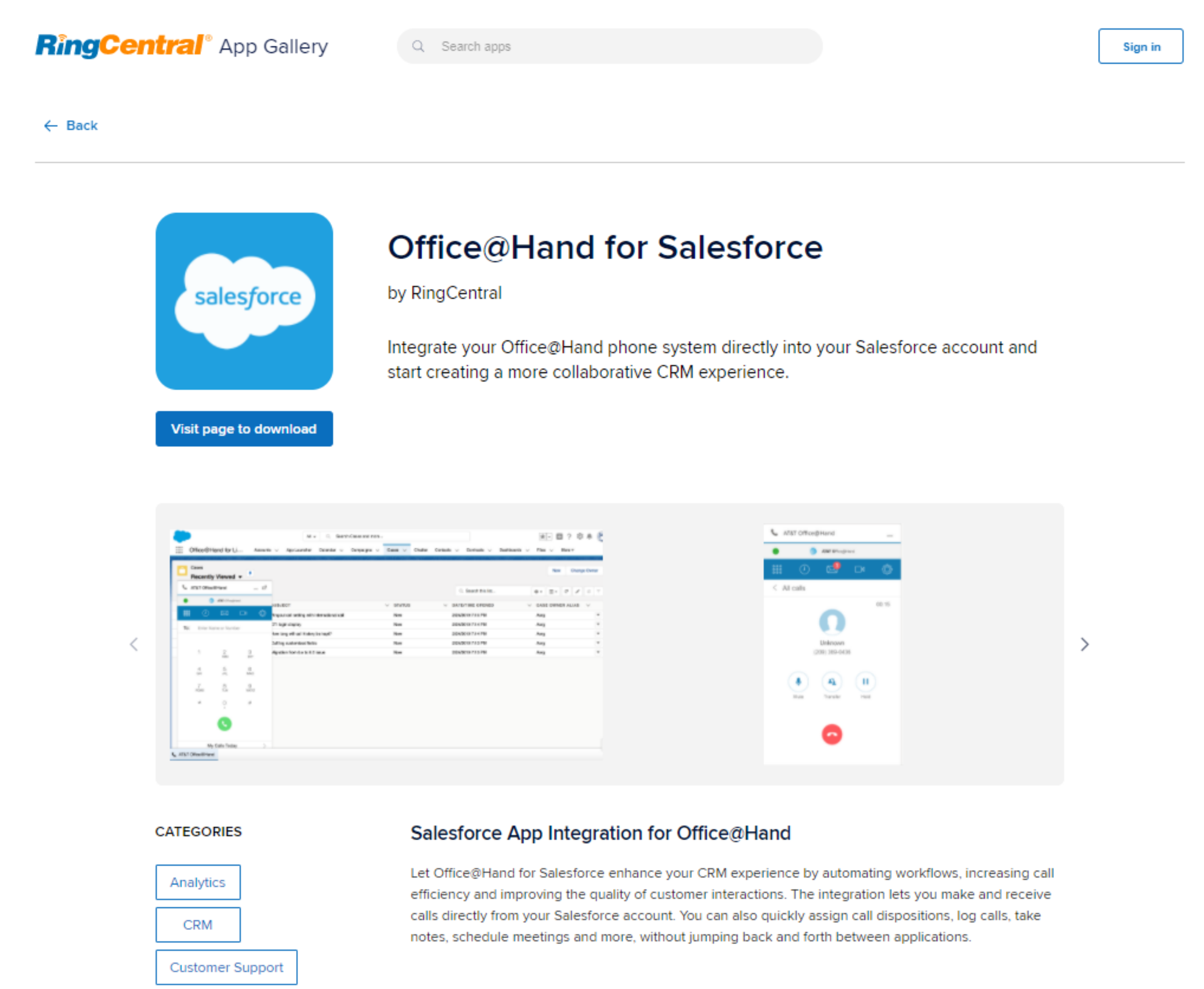
- Office@Hand Premium or Enterprise
- Windows XP or above
- MAC OS X 10.8 Mountain Lion or above
- IE11+ / Microsoft Edge 38+ / Firefox 52+/ Chrome 56+/ Safari 11+ (Classic only)

- 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.



Steps for setup and configurations for first-time installation

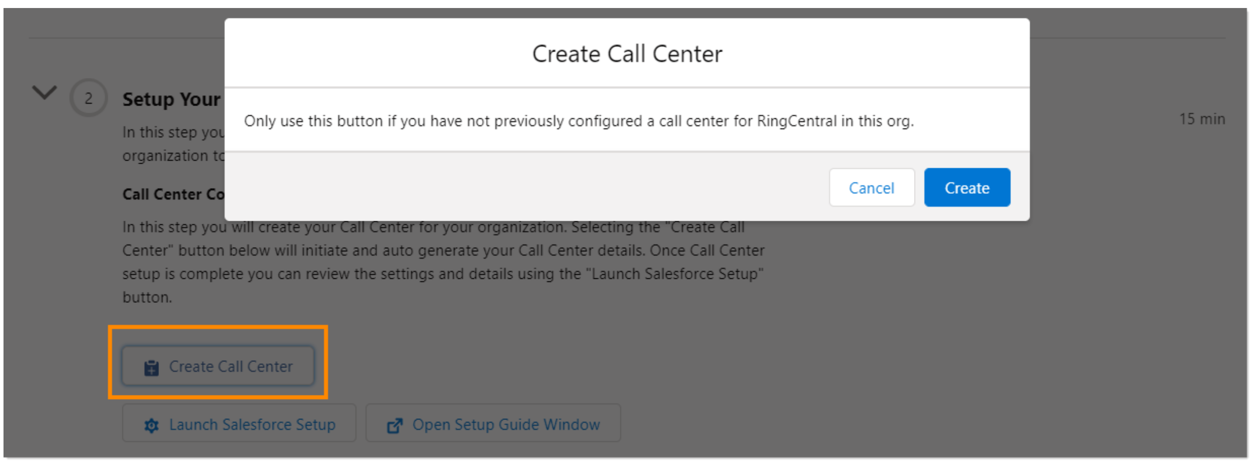
If this is the first time you have installed Office@Hand for Salesforce, you can use the new Install wizard tool to set up & configure the CTI. Please follow the steps below to access the Install wizard and start your setup and configuration.

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.

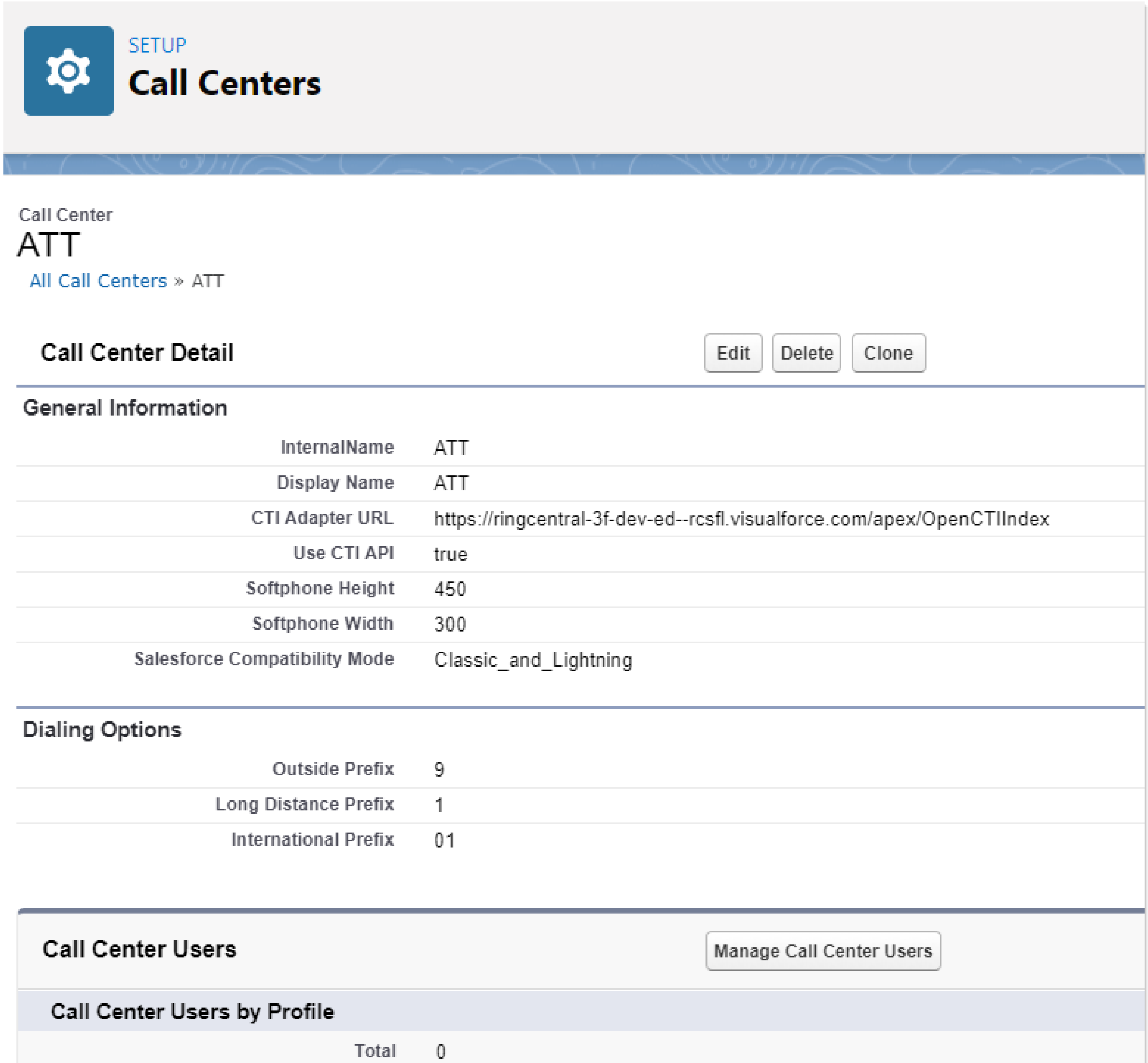
The Install wizard will guide you through all the required steps for configuring the RingCentral for Salesforce application. The install wizard is divided into seven steps for configuring various settings.

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.

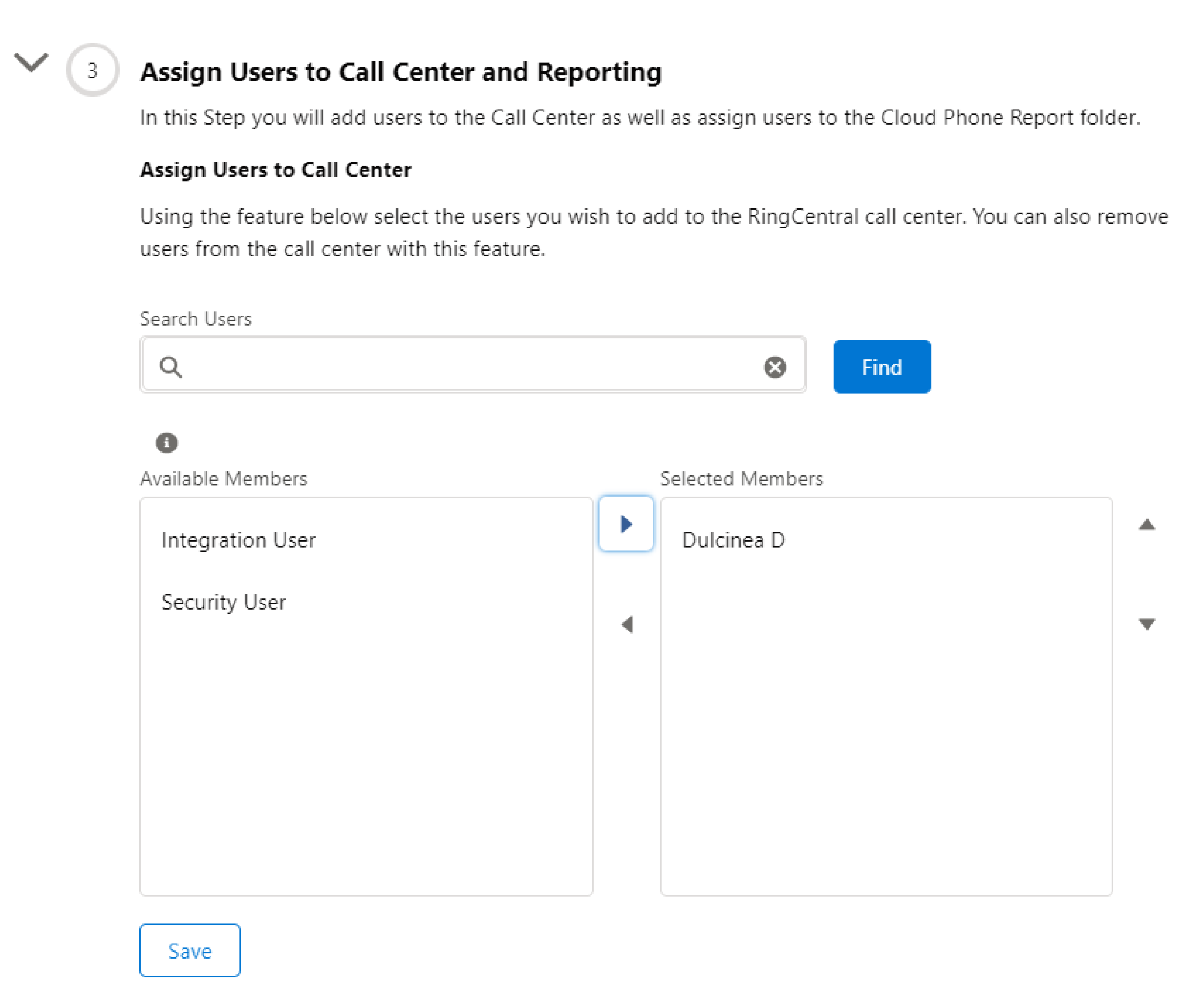


Note: The **Create Call Center** option will be disabled during upgrades. It will only be available when the application is installed for the first time.

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.

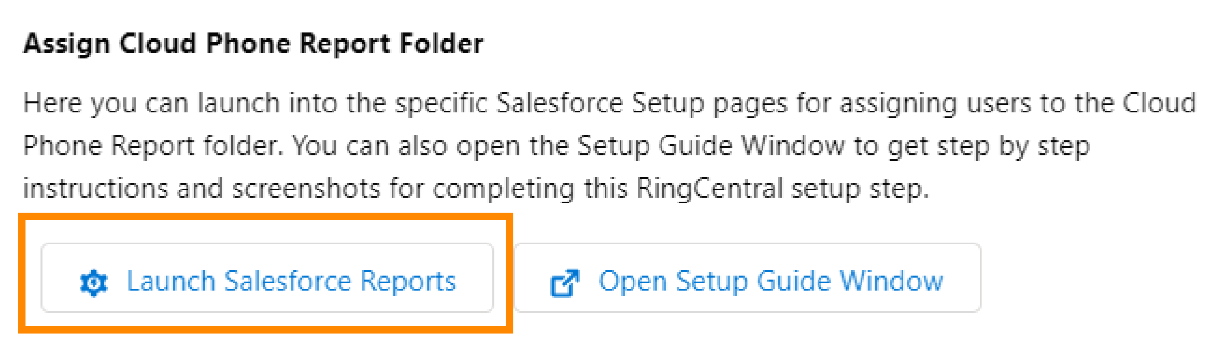
Also, you can configure to access call recordings from the logged call activity.

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.

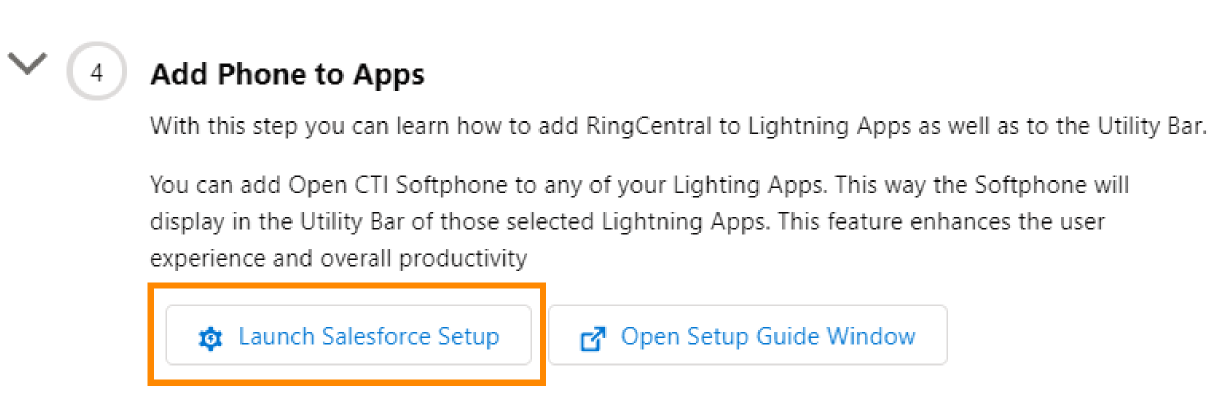


Now you are all set, and your end users will be able to start using the application. You can continue with the additional configurations as required for the organization.

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



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**.



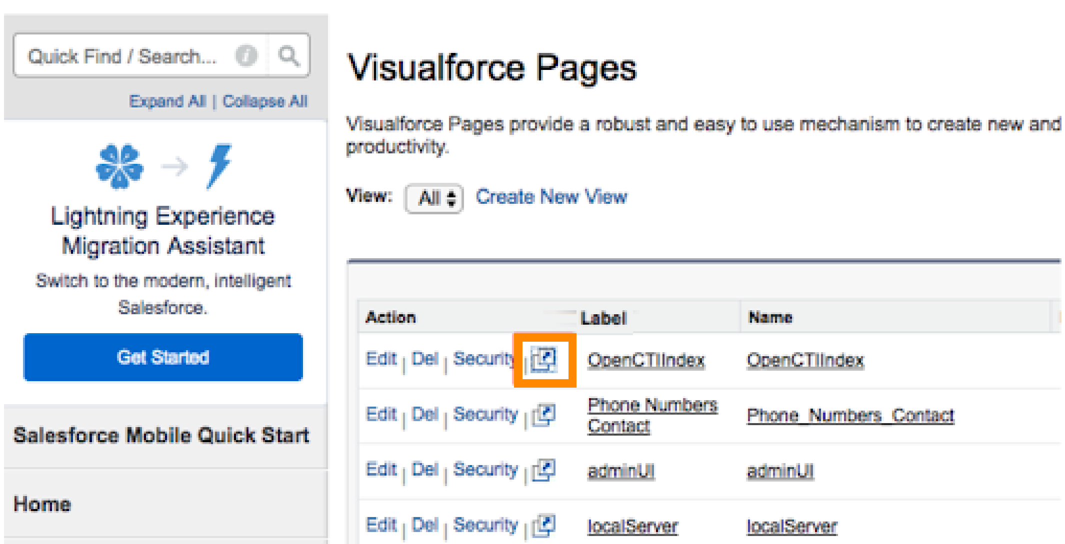
Steps 5 through 7 of the wizard walk you through enabling additional settings such as Mobile experience, Analytics, configuring softphone layout, and Admin settings for the Office@Hand app.

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

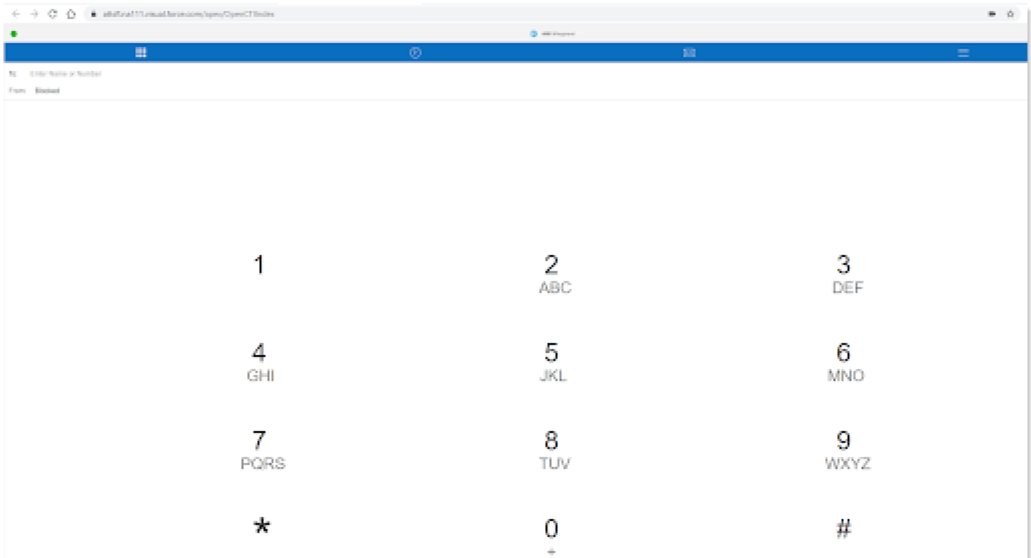
If you have already installed Office@Hand for Salesforce in the past and are upgrading to the latest version of the integration, please follow the steps below.

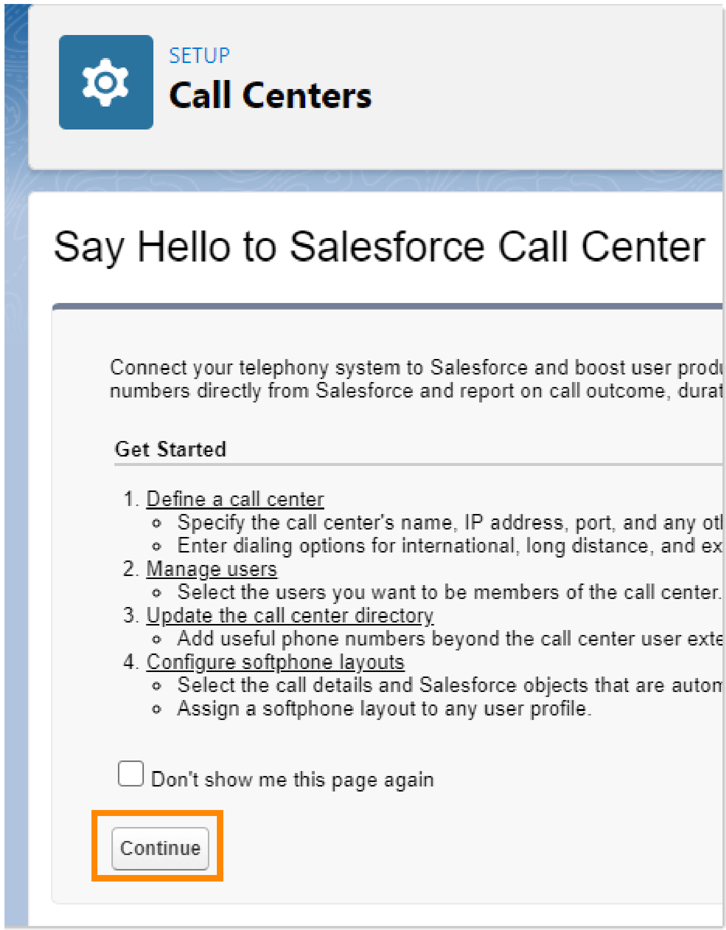
Step 2: Configure the Call Center

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

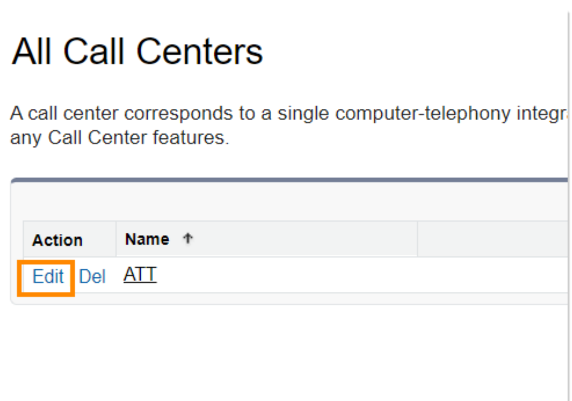


After the page opens in a new tab or window, copy its URL. For example, the full URL is https://c.na78.visual.force.com/apex/OpenCTIIndex. Close the tab and return to **Setup Home > Platform Tools > Feature Settings > Service > Call Center > Call Centers** and click **Continue**.





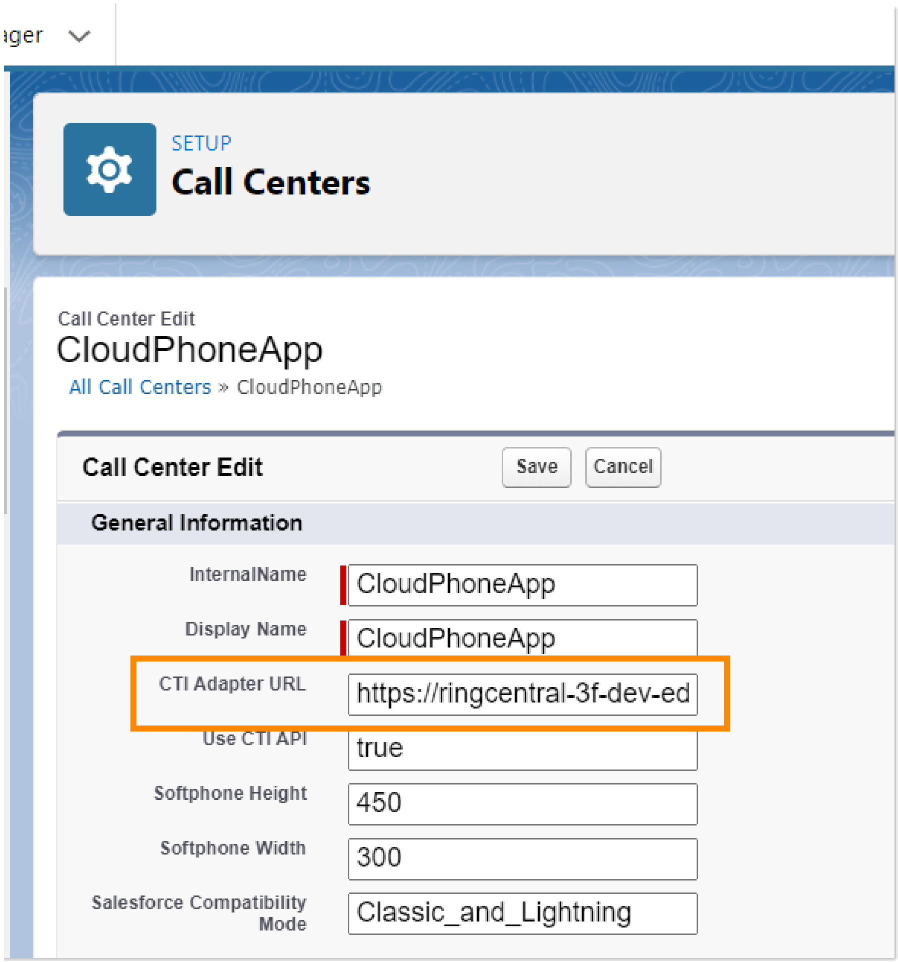
Select the name of the call center you previously set up and click **Edit**.



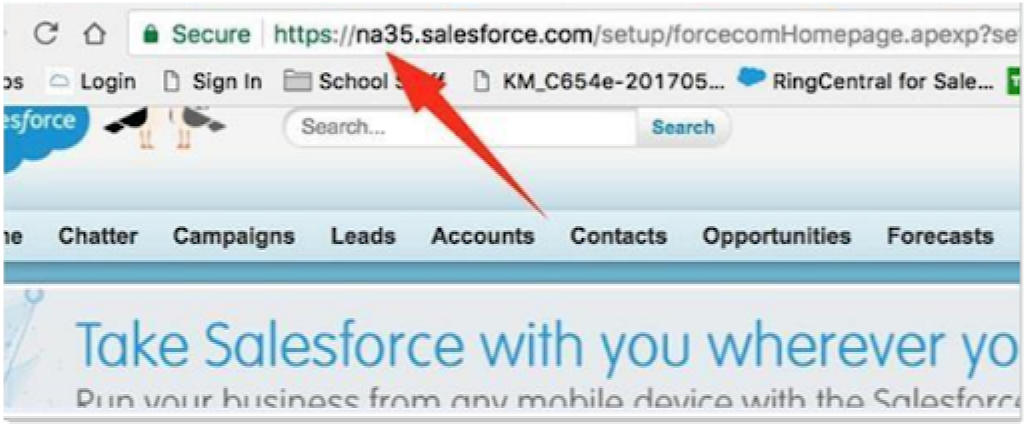
Note: If there is no call center, refer to the Troubleshooting section to manually create the Call Center.

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**.



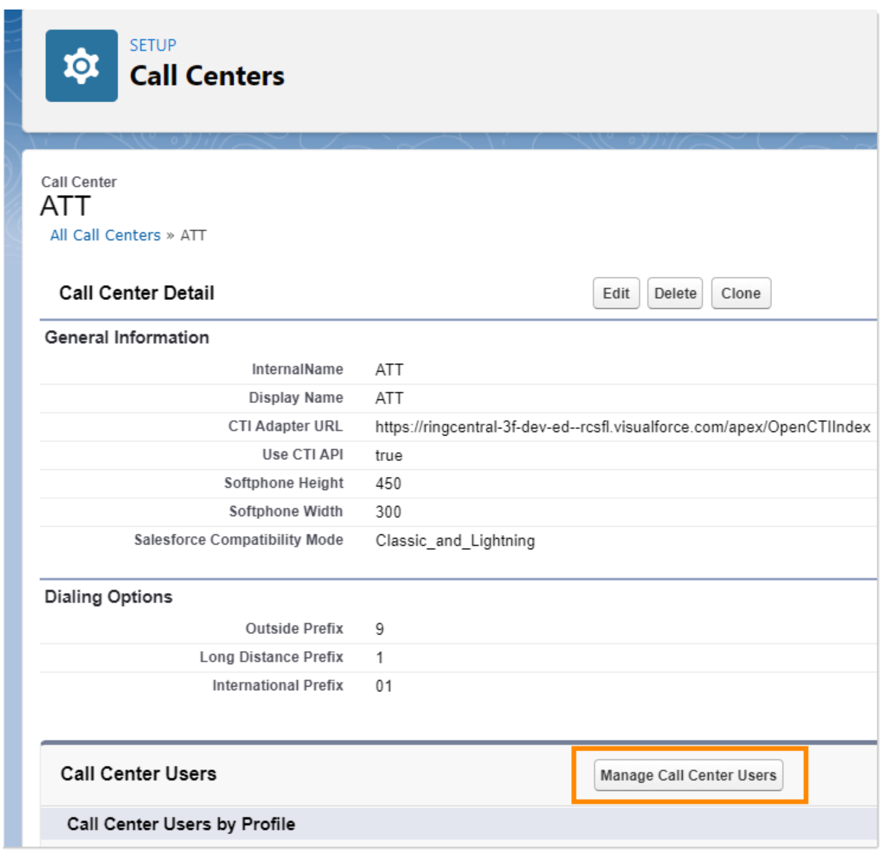
If you are not using a custom URL, follow the same steps and make sure the Salesforce POD# in the Call Center URL, **na35** in this example, mates with Call Center where Salesforce Org resides. Your Salesforce POD# is specified in the browser address bar after your login to Salesforce.



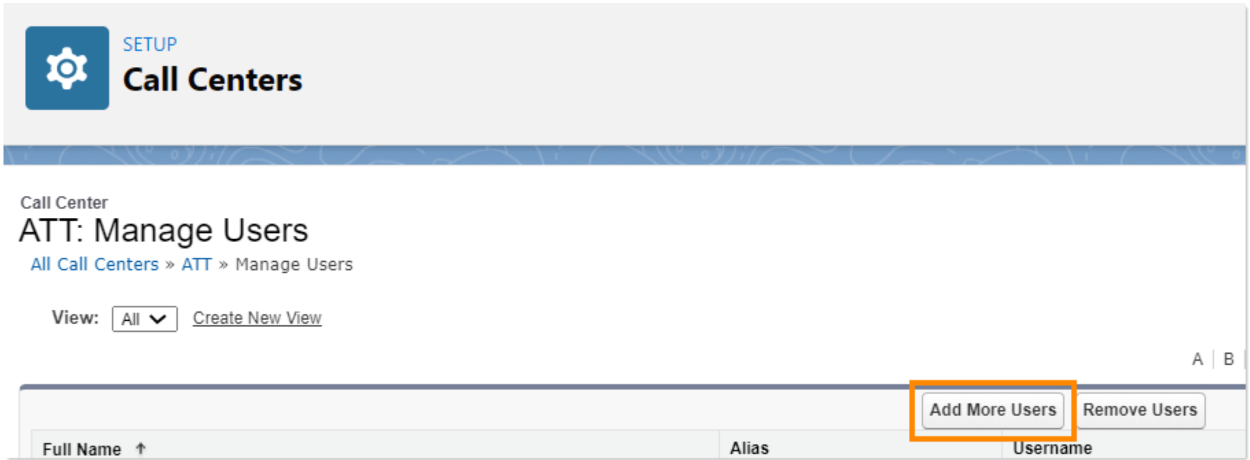
Note: If there is no call center, refer to the Troubleshooting section for instructions on manually creating the Call Center.

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.



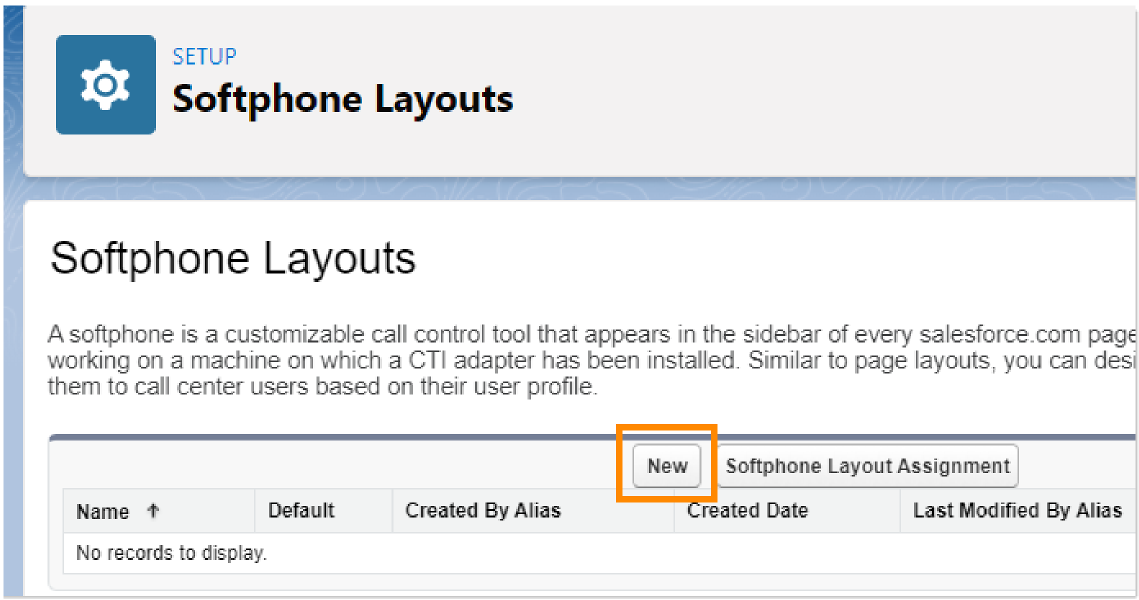
Note: If your users are added to another call center already, please first remove them from that call center before you try to add them in this call center.



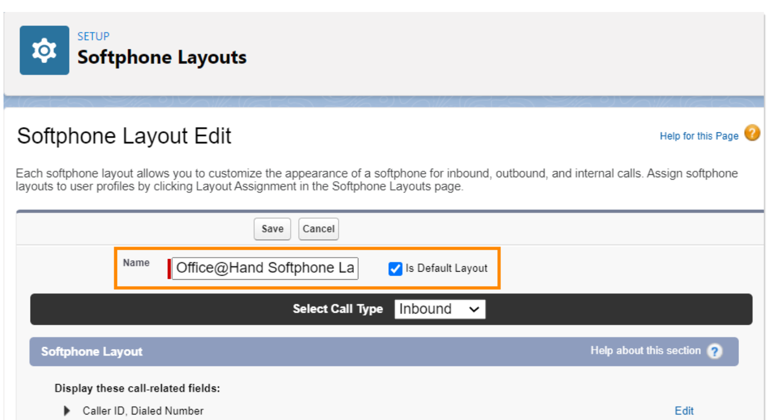
Setting up SoftPhone Layouts in Salesforce

Step 1: Set up a SoftPhone Layout

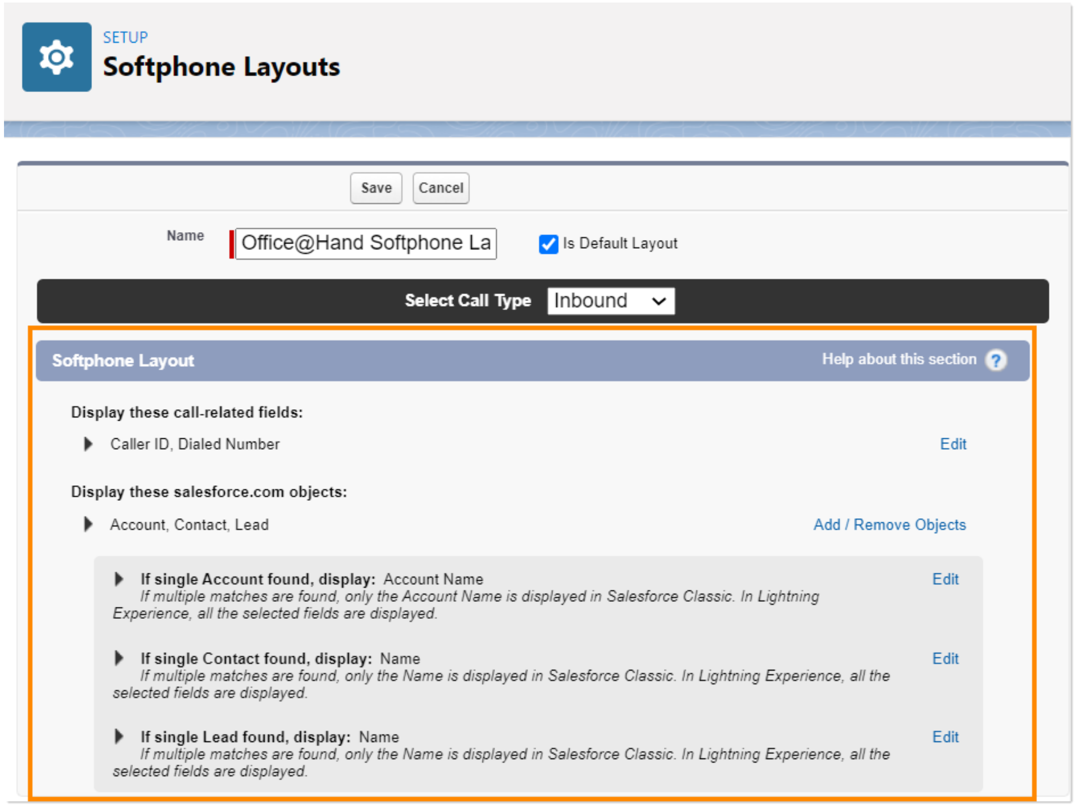
From the left-hand side menu, navigate to **Setup** > **Customize** > **Call Center** > **SoftPhone Layouts**, and then click the **New** button.



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.

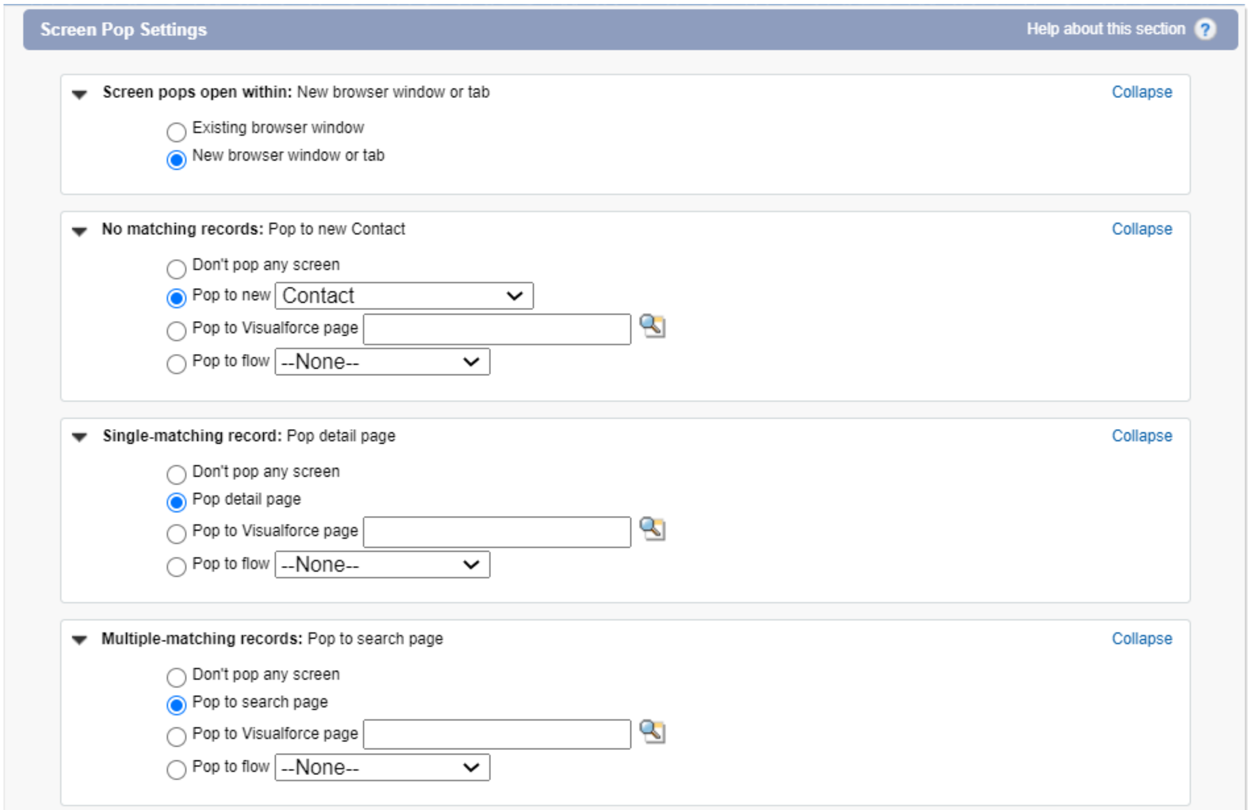


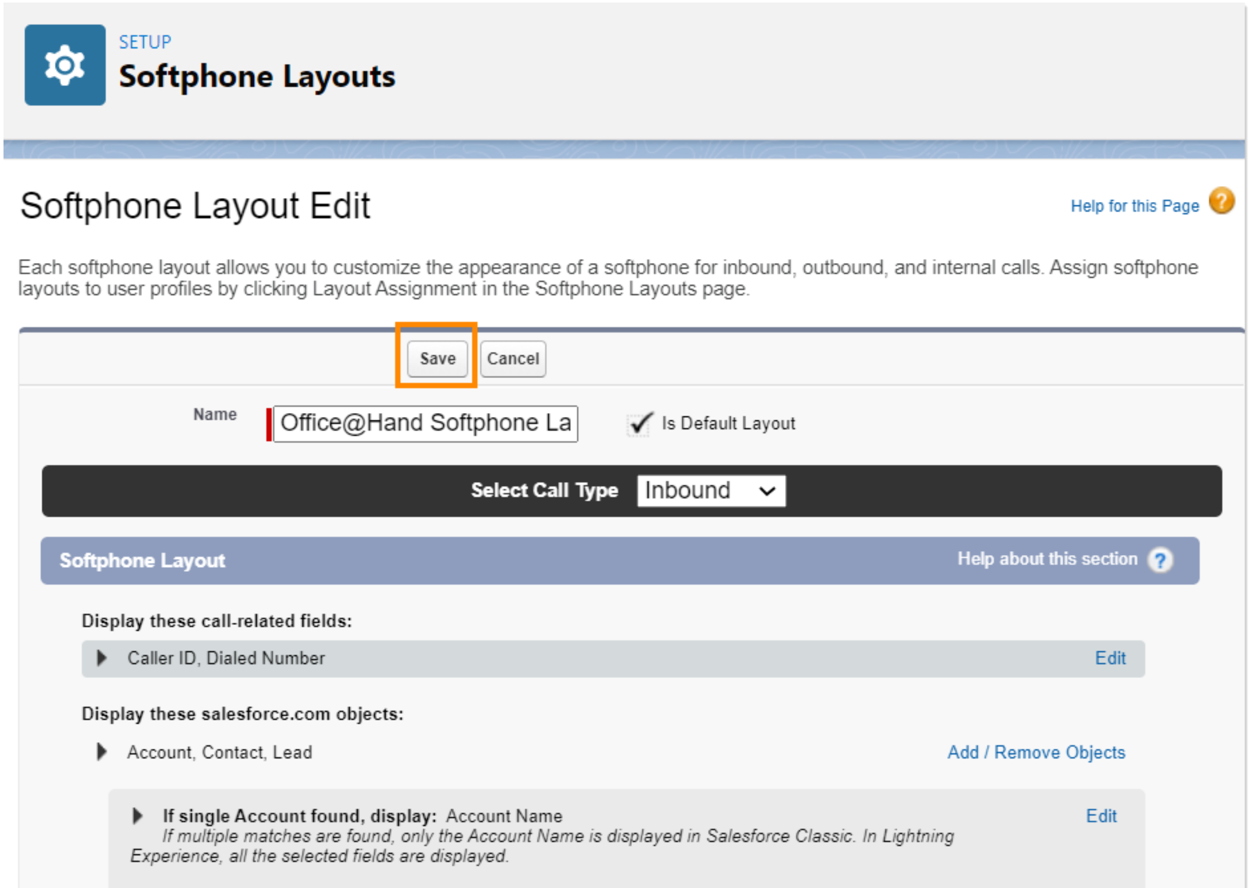
Also, select the other Softphone layout options.



In **Screen Pop Settings**:

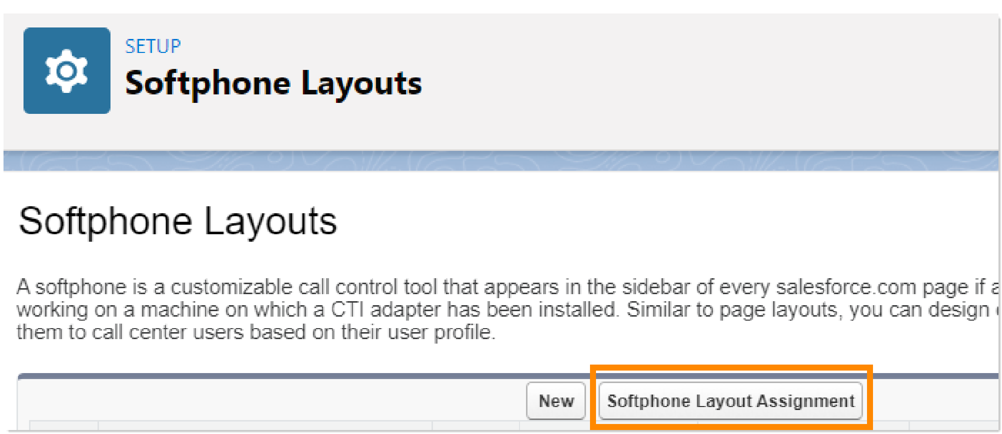
- In the first set, **Screen pops open within**, choose whether you'd like screen pops to appear in a new window or to overwrite the existing Salesforce.com window when a new call arrives.
- For the second set, **No matching records**, if you'd like a new record to be created if there's no match on an 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
Contact
Pop to Visualforce page
Pop to flow
--None--
Single-matching record: Pop detail page
Collapse
Don't pop any screen
Pop detail page
Pop to Visualforce page
Pop to flow
--None--
Multiple-matching records: Pop to search page
Collapse
Don't pop any screen
Pop to search page
Pop to Visualforce page
Pop to flow
--None--



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**.



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

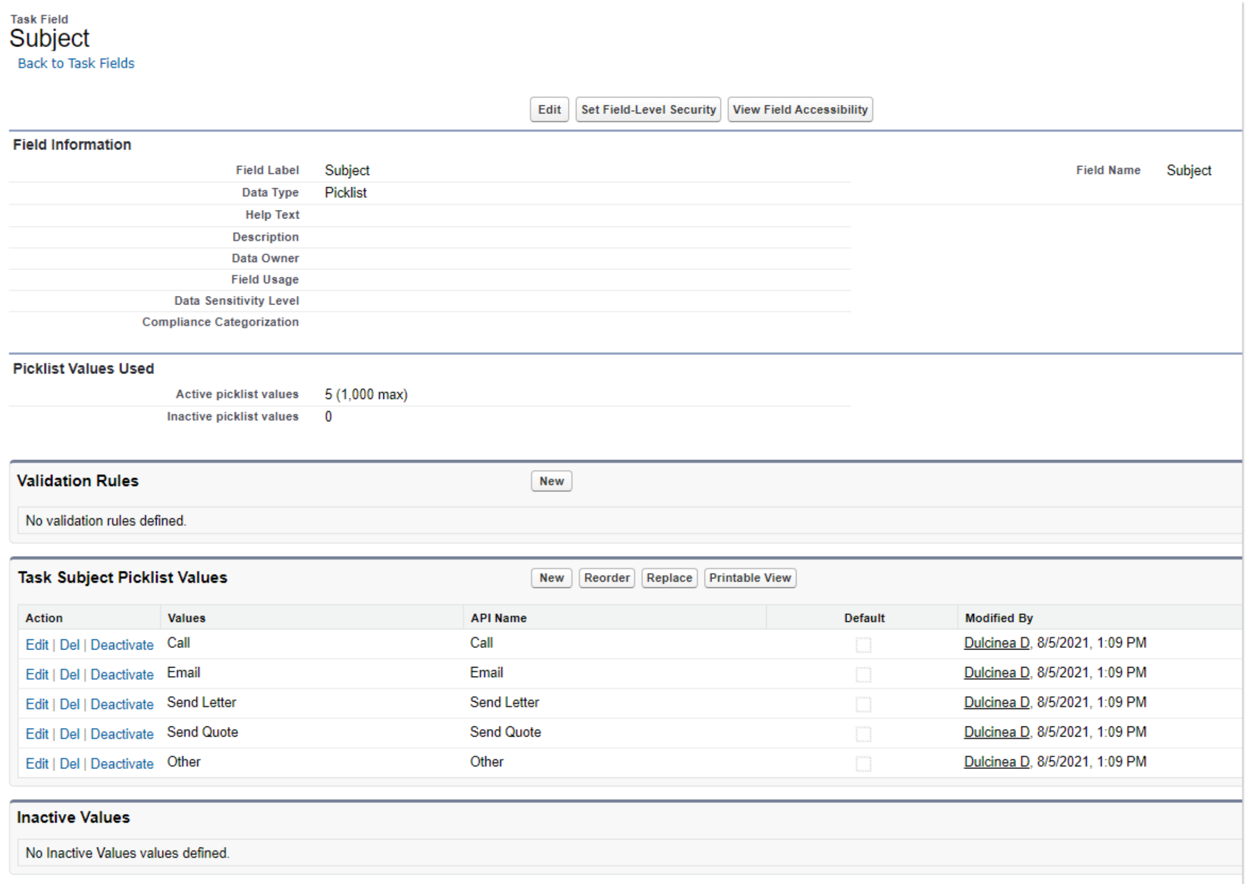

SETUP
Softphone Layouts
Softphone Layout Assignment
Assign a softphone layout to each profile in the list below. Only profiles that include call
been assigned are displayed.
Save
Cancel
Profile
System Administrator (1)
-- Default --
-- Default --
Office@Hand Softphone Layout

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:

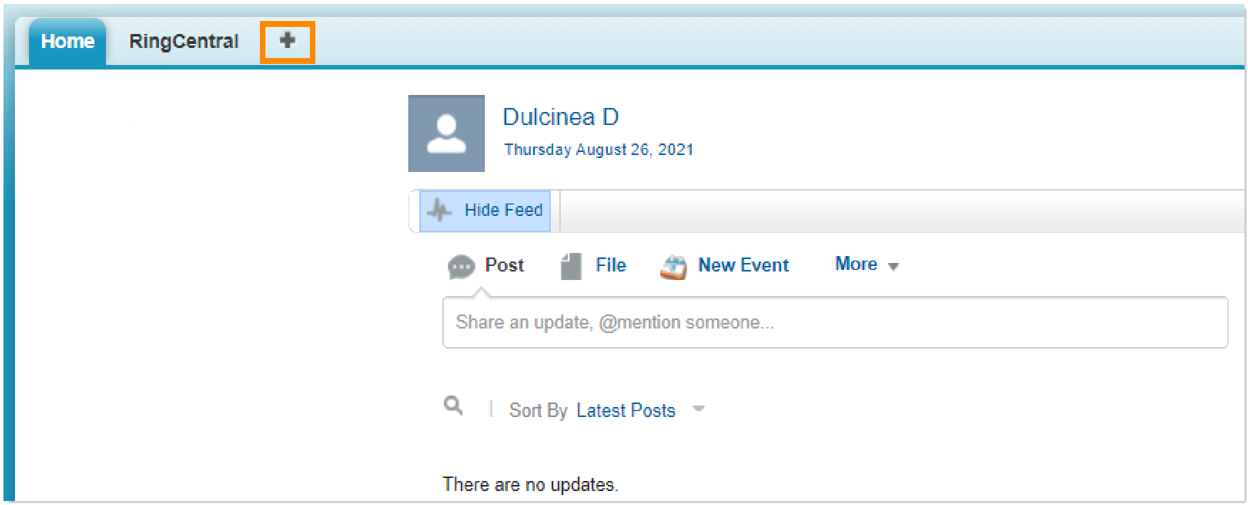
1. Navigate to **App Setup > Activities > Task Fields**.
2. Click **New** beside **Task Subject Picklist Values**.
3. Enter a name for the new Disposition.
4. Click **Save**.



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

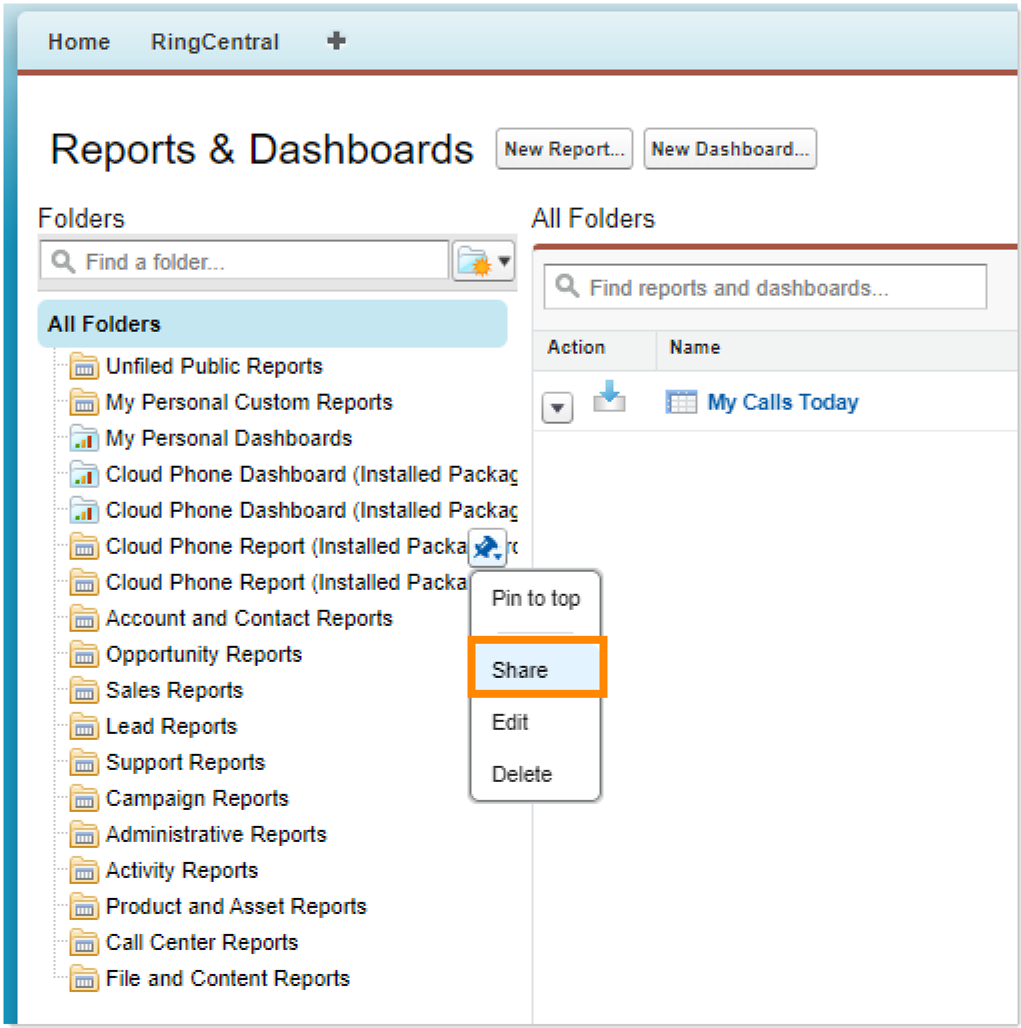
Sharing Reports folder with users

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




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

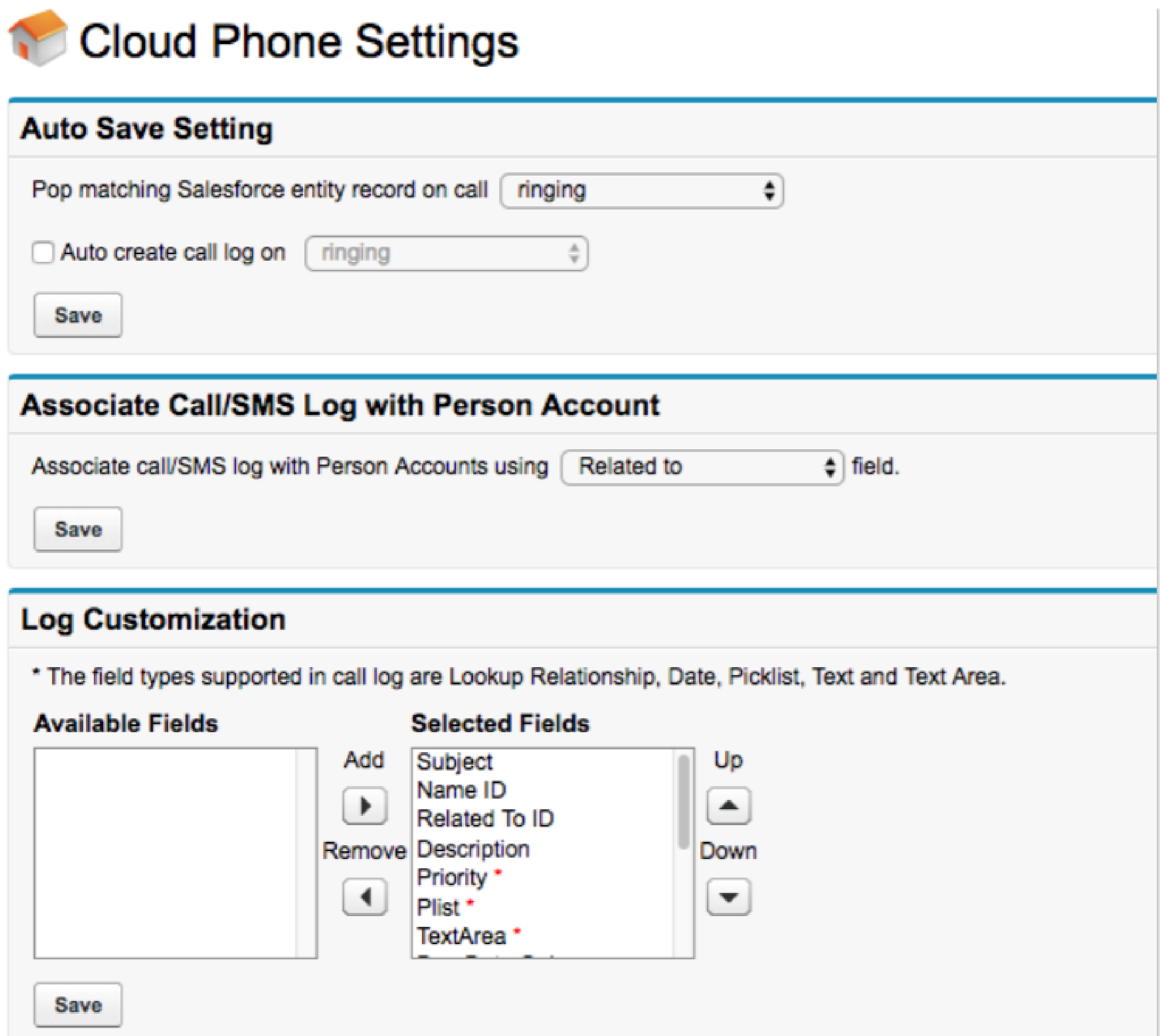


In the new window, select **Users** or **Roles** you want to share the reports with, then click **Done** and **Close**.

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.

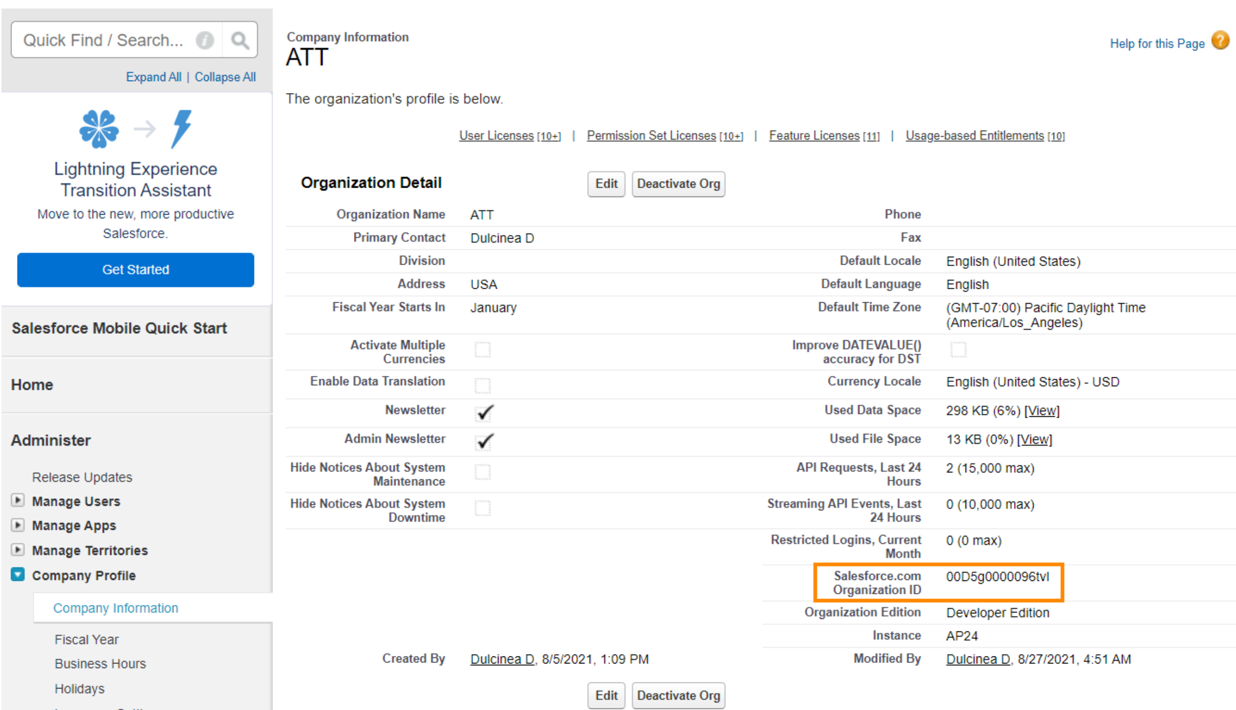


On the **Cloud Phone Settings** page, you can access the following:

- **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.

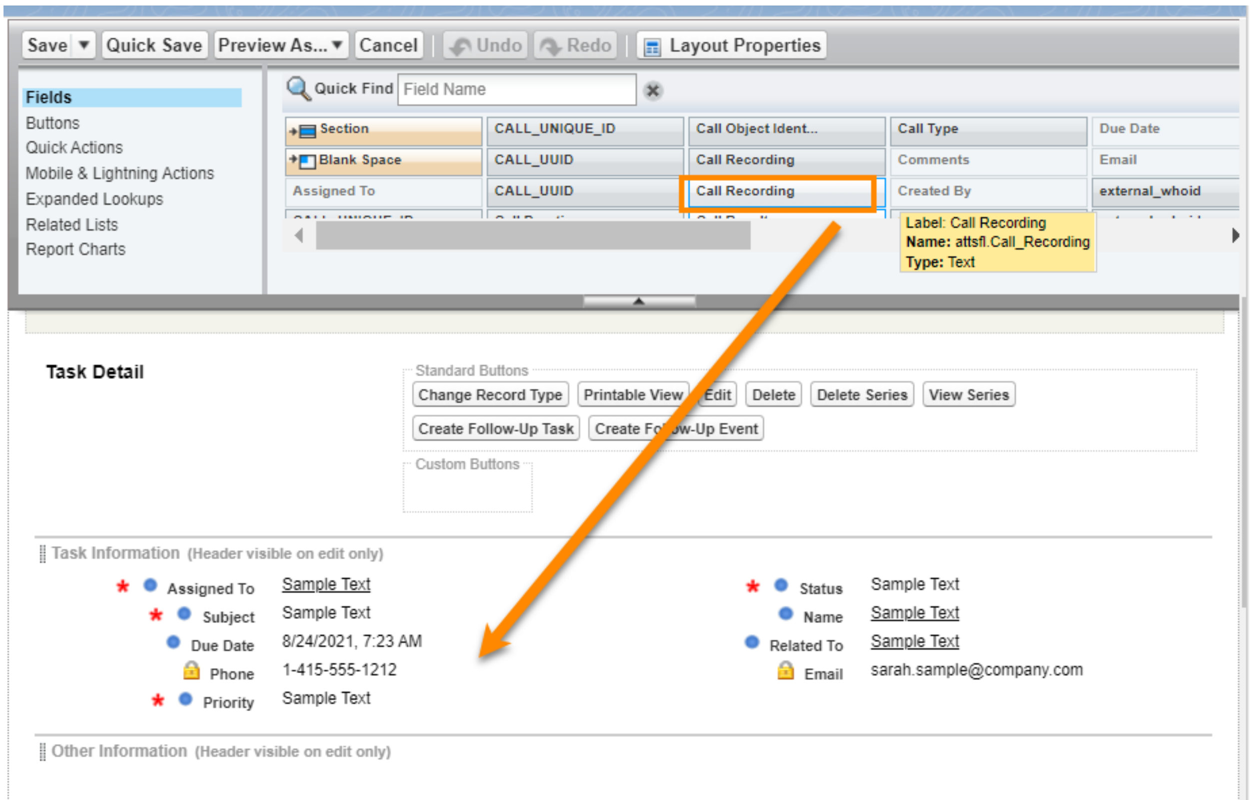
  Note: The field types supported in **Call Log** are **Lookup Relationship**, **Date**, **Date/Time**, **Picklist**, **Text**, and **Text Area**.

- **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.



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.

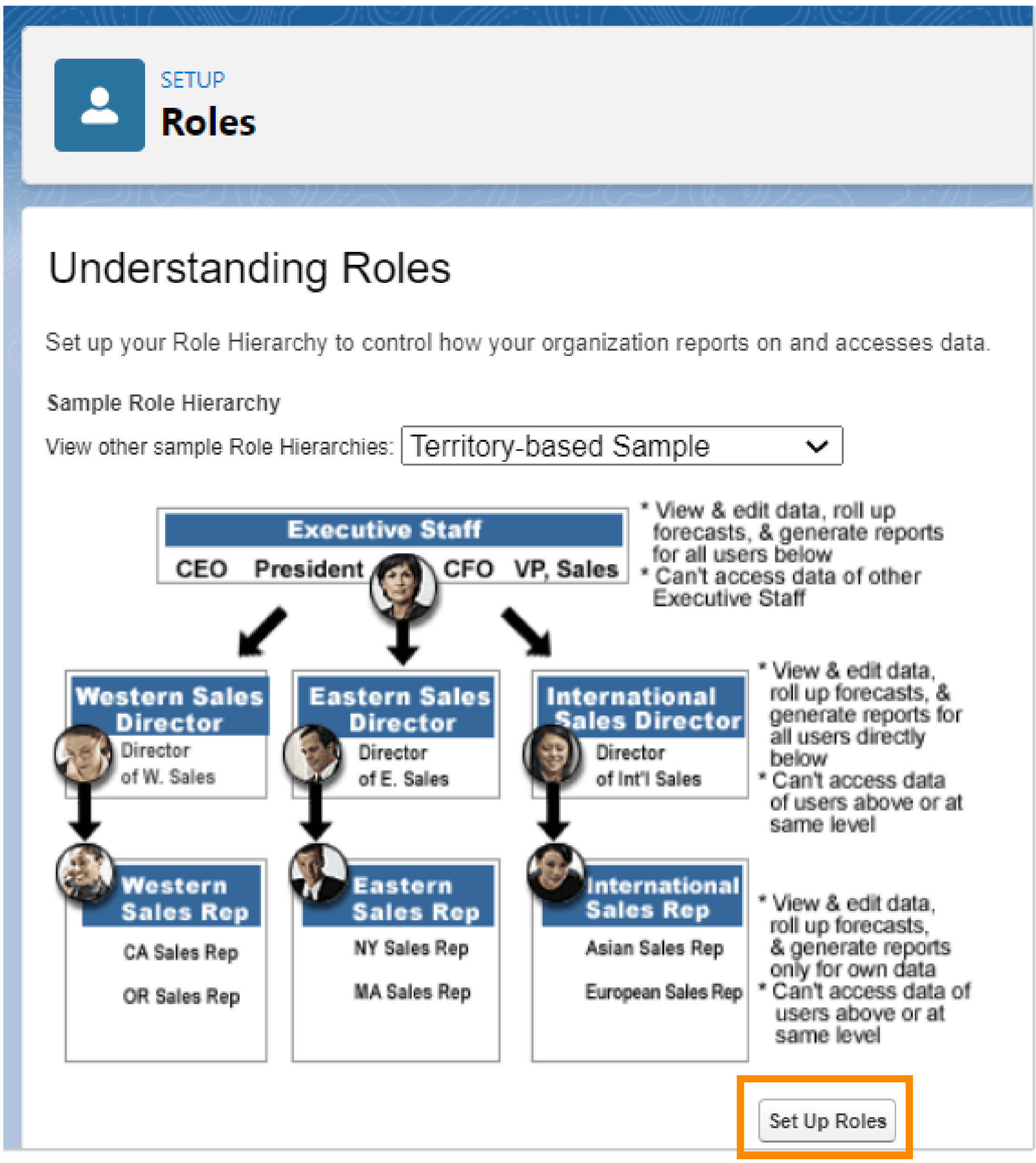


Analytics Report

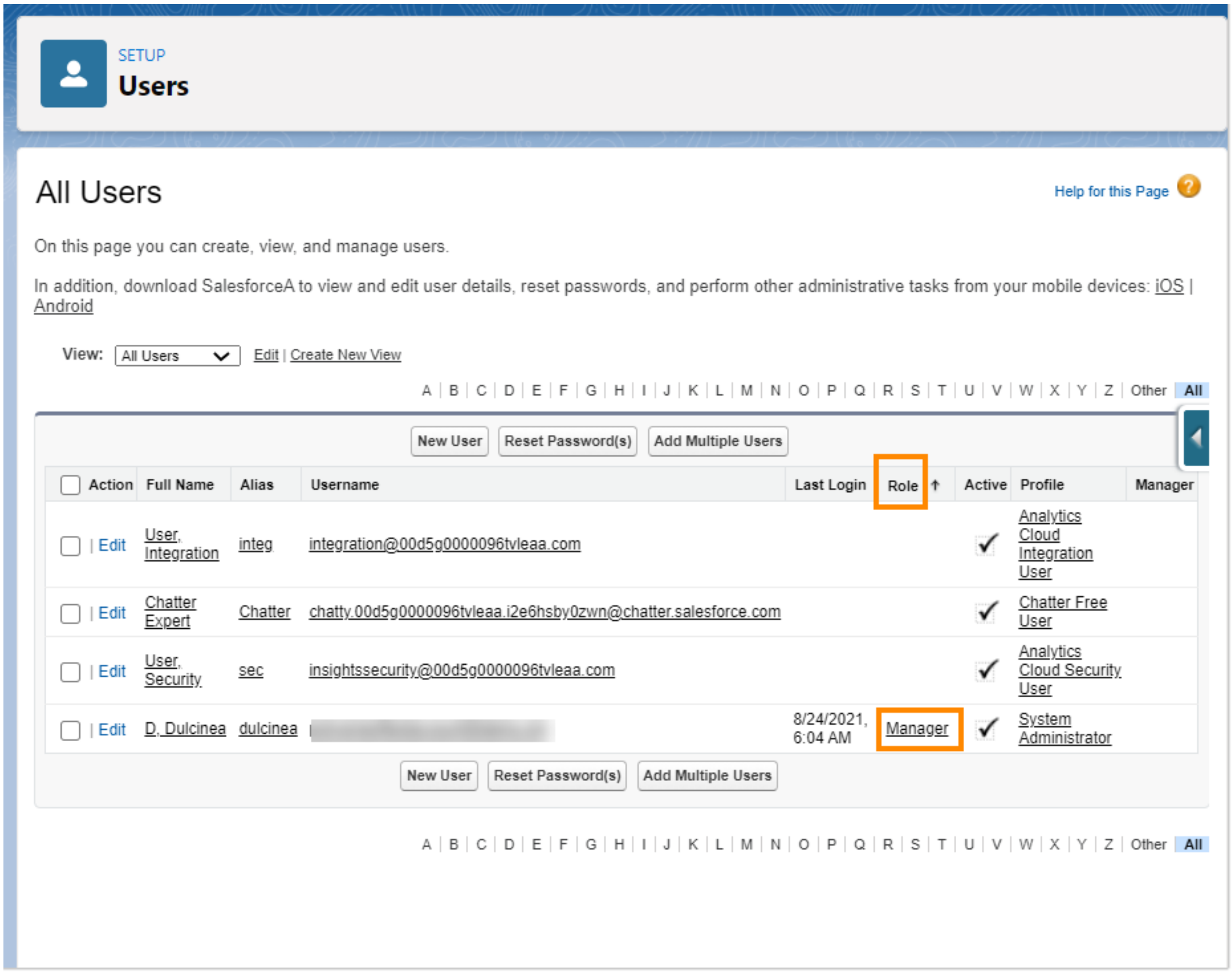
Analytics Report is a key feature that gives your sales leaders complete visibility on their team's performance from a call data perspective. It also gives sales reps insights into their call data.

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**.

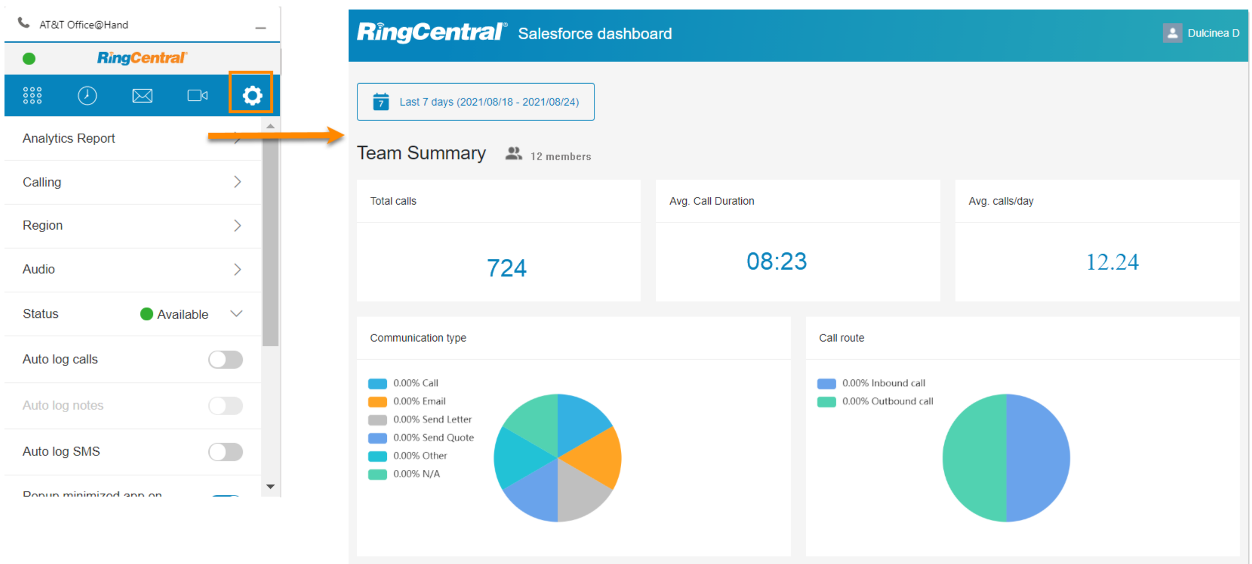


You can define the team hierarchy here and assign roles to users.



Entry for Analytics Report

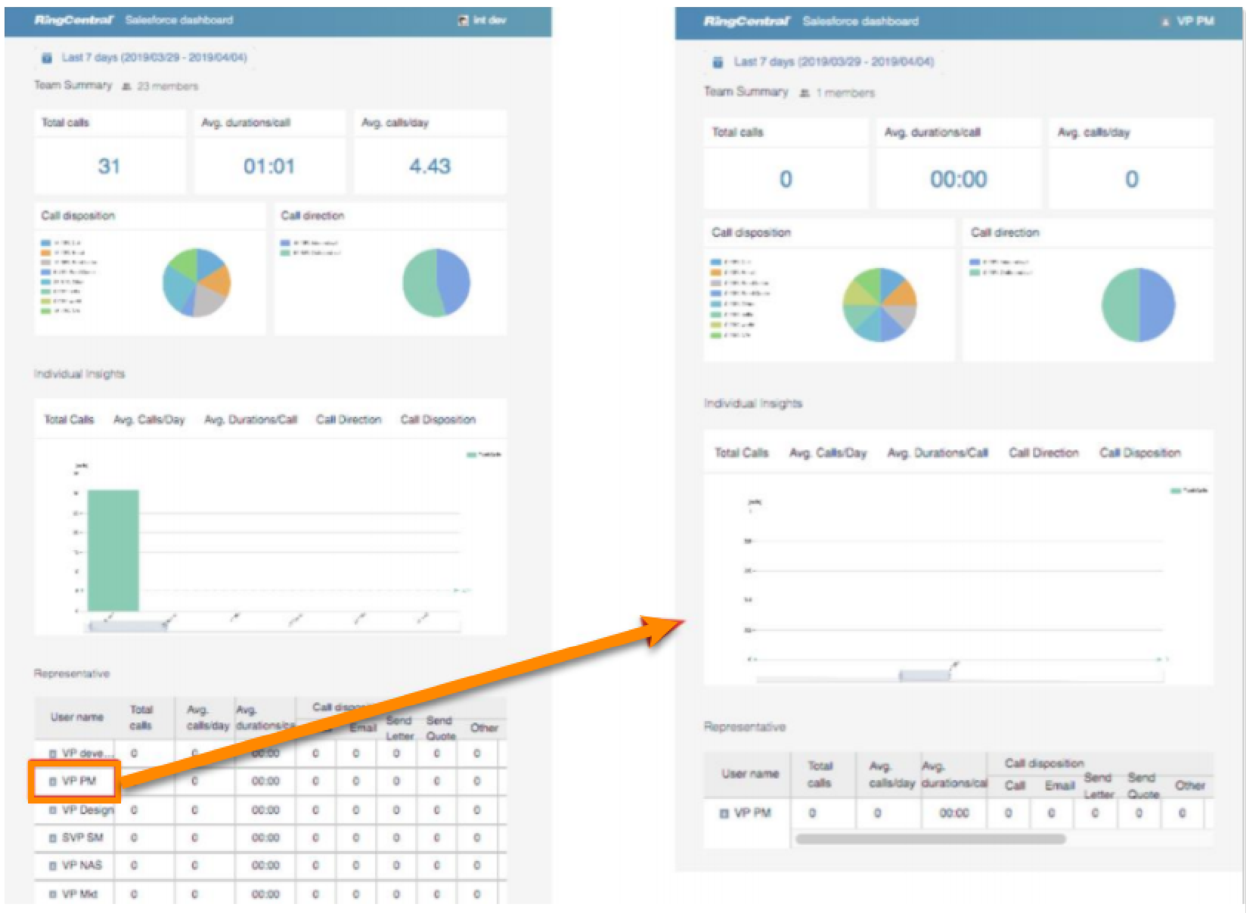
Analytics Report is available under the **Settings** menu. If you have not set up the role hierarchy, it only shows your individual data for the signed in account. If role hierarchy is enabled, it shows the data for all the team members.



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.

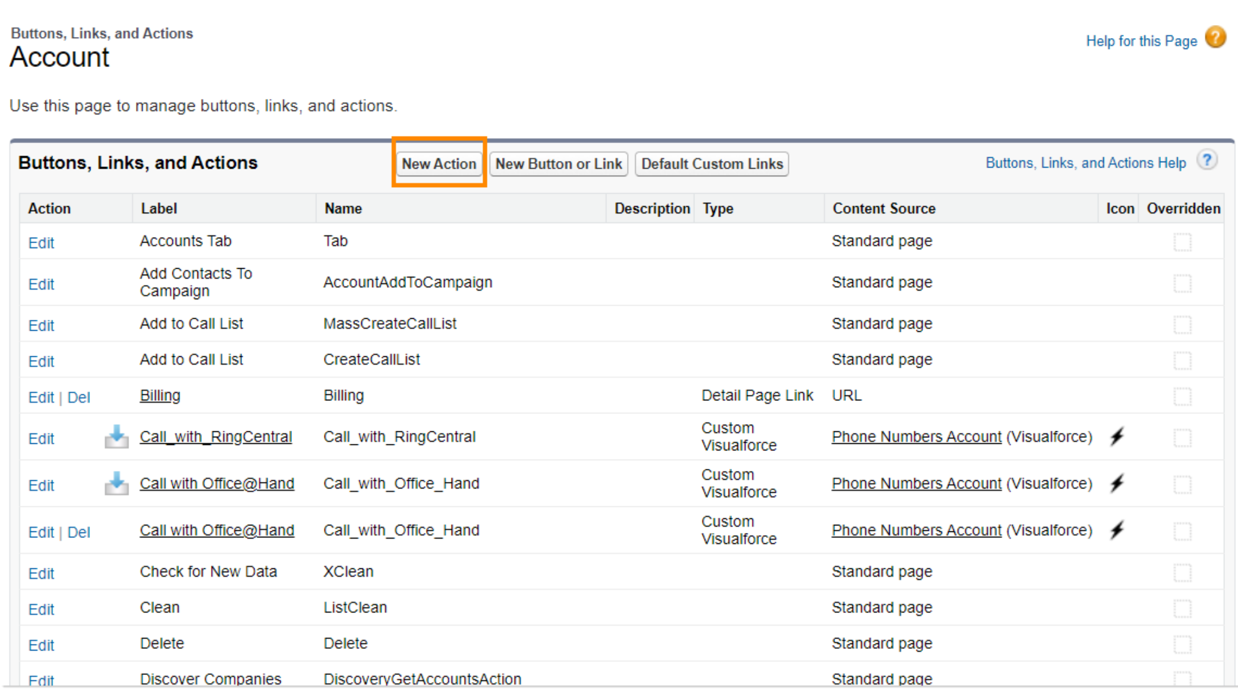


Adding Office@Hand Call and SMS options to Salesforce1

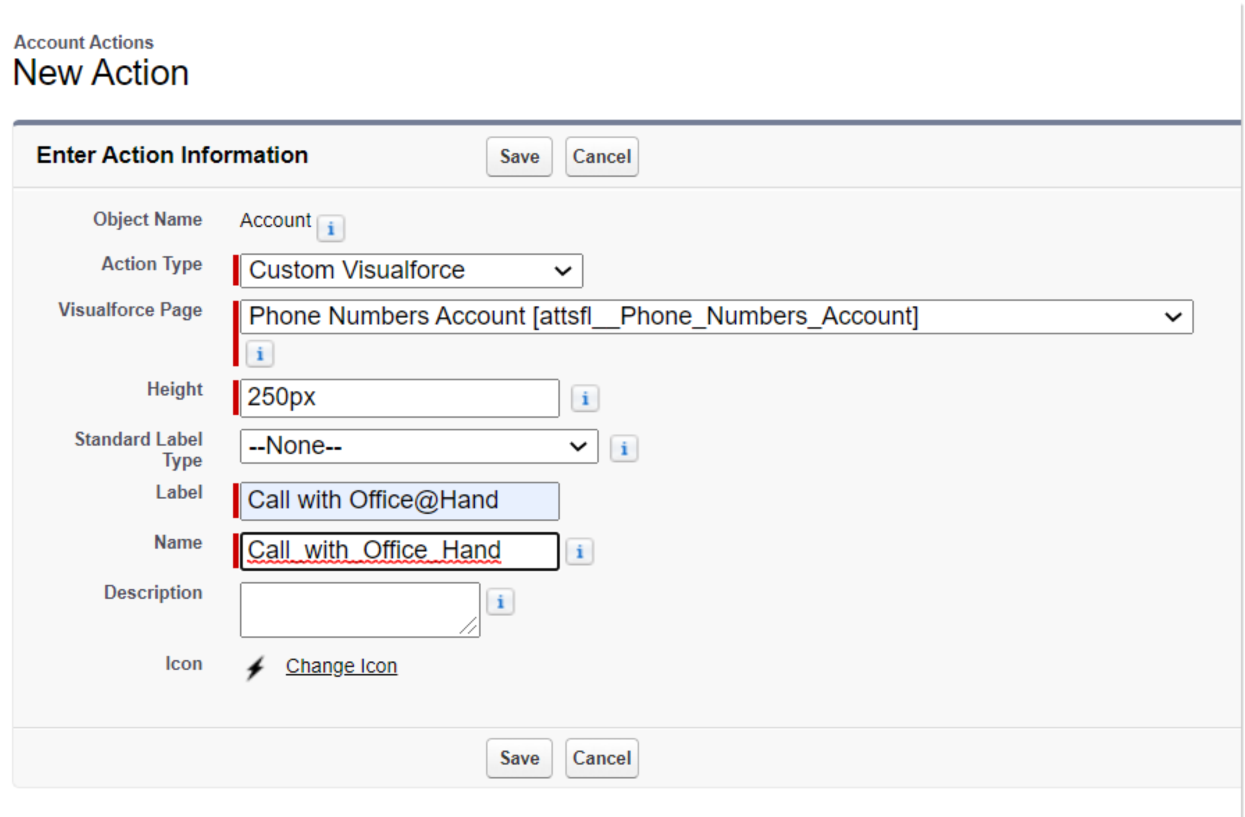
Follow the steps below to add **Call with Office@Hand** and **SMS with Office@Hand** options to the Account/Contact/Lead details tab in the Salesforce app. As an example, below are steps to add the options to the **Accounts Page Layout**.

Creating New Actions

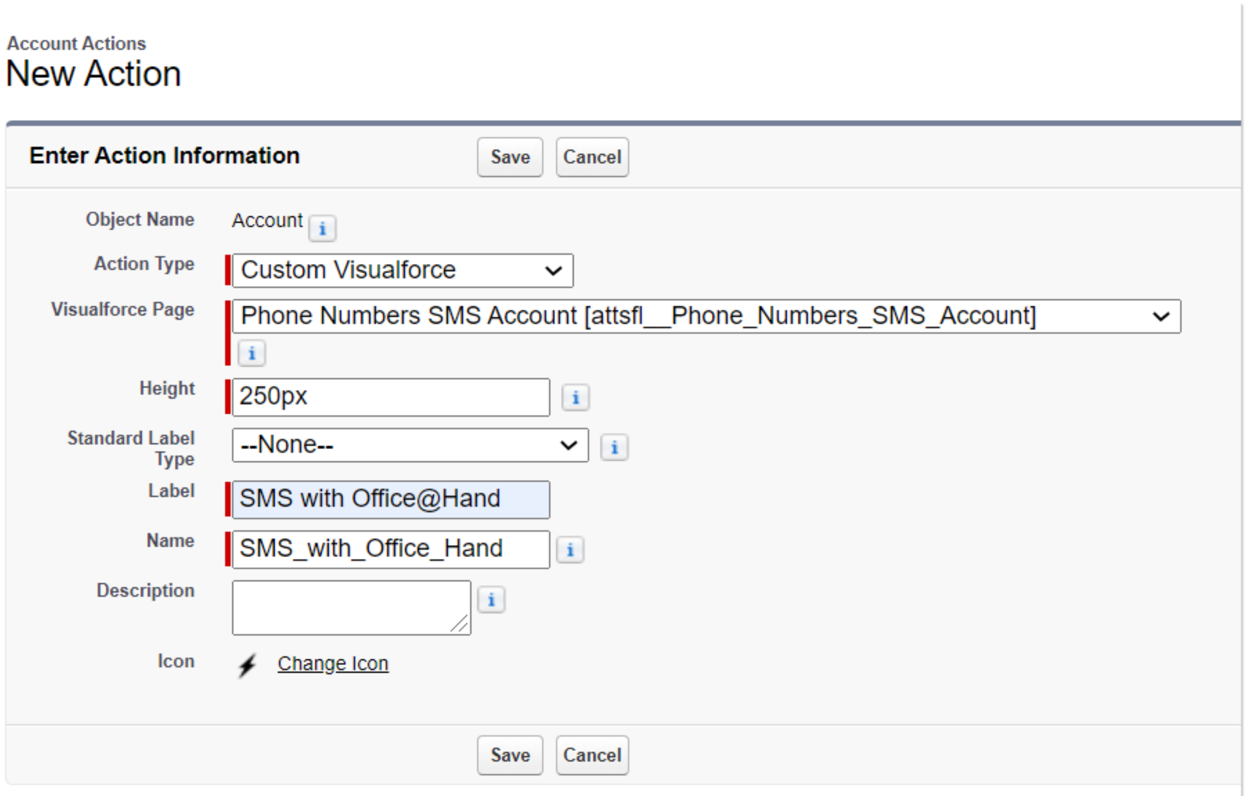
Navigate to **App Setup > Customize > Accounts > Buttons, Links, and Actions > New Action**.



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**.

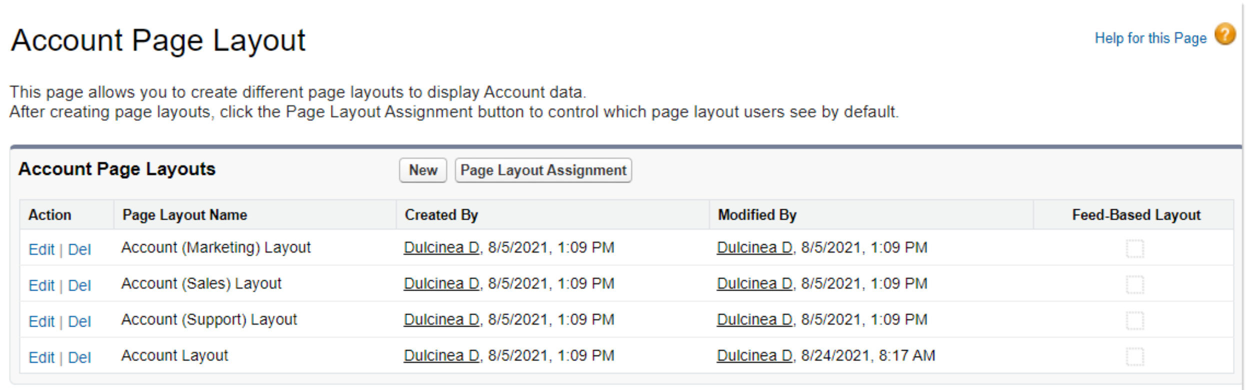


Repeat the above step and select *Phone Numbers SMS Account [Phone_Numbers_SMS_Account]* in the **Visualforce Page** dropdown list, enter SMS with Office@Hand as **Label**, and click **Save**.

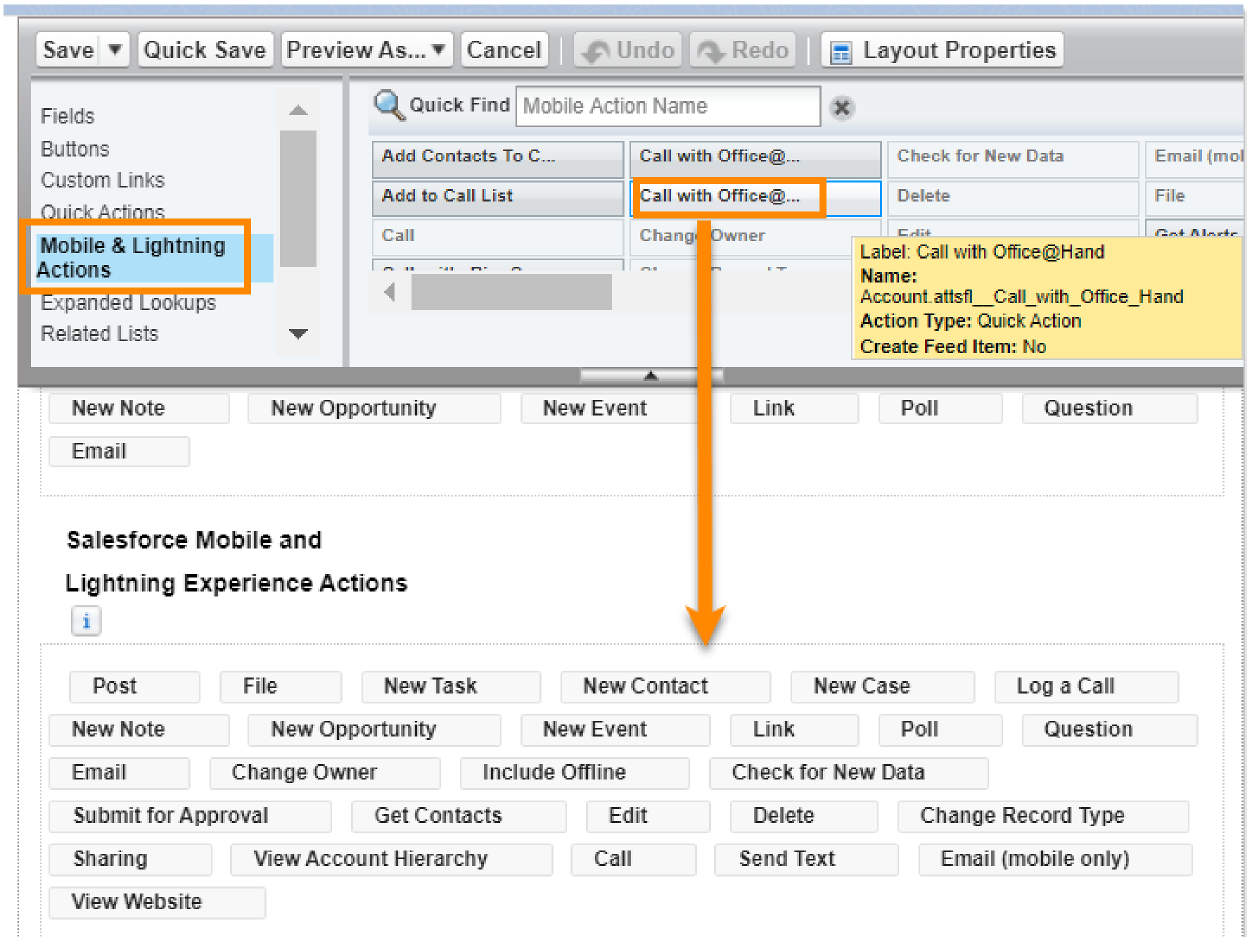


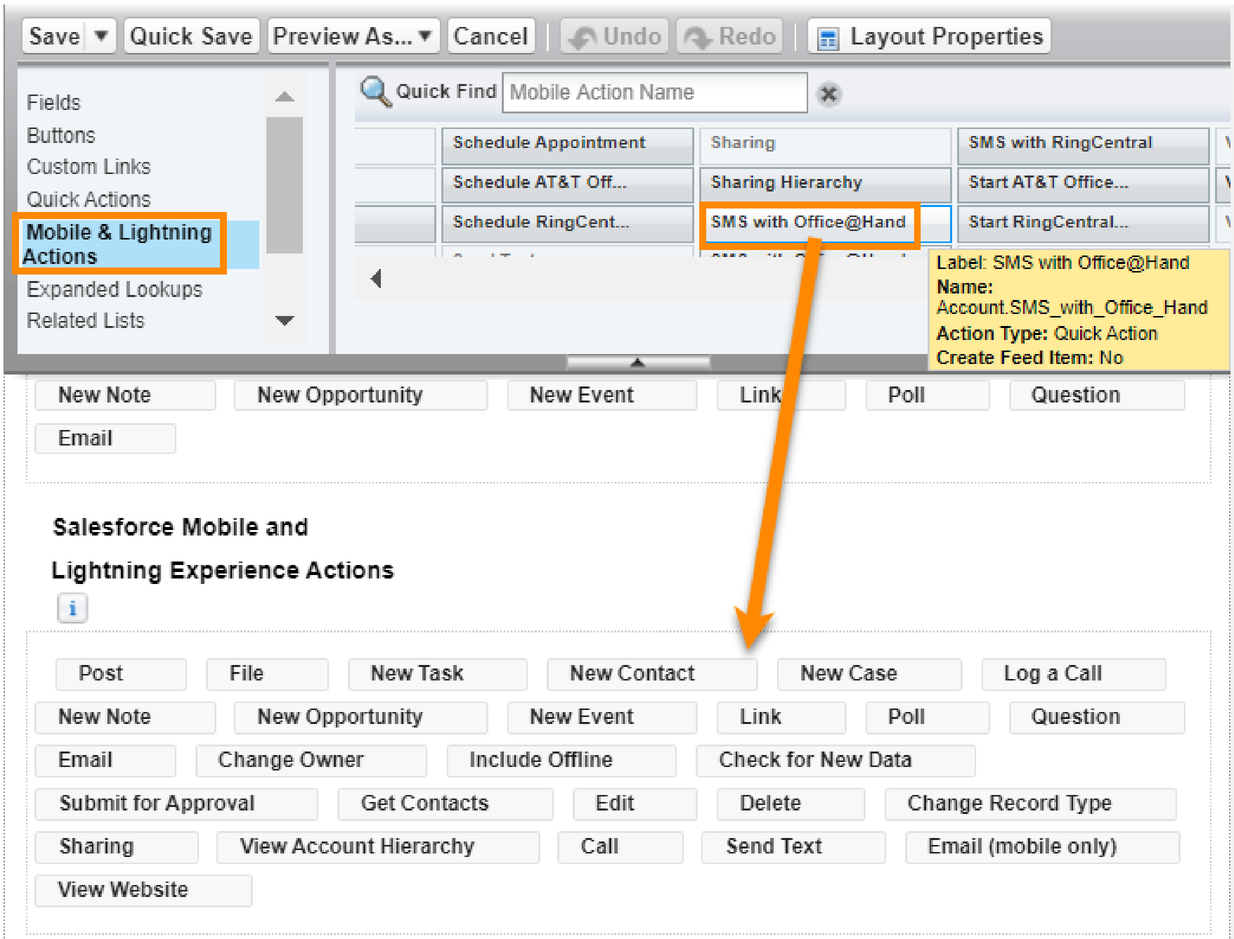
Adding Actions to Salesforce

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



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** 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?

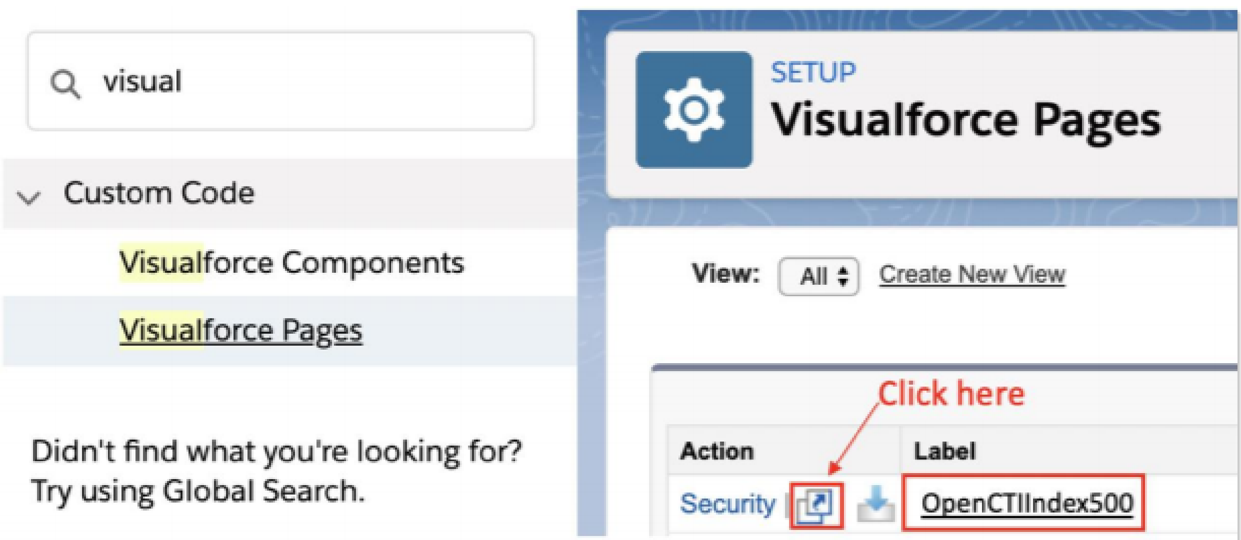
A: First, navigate to **App Setup > Call Center > Customize Call Centers** and verify that the CTI Adapter URL is pointing at: /apex/Office@Hand OpenCTIIndex#/

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.

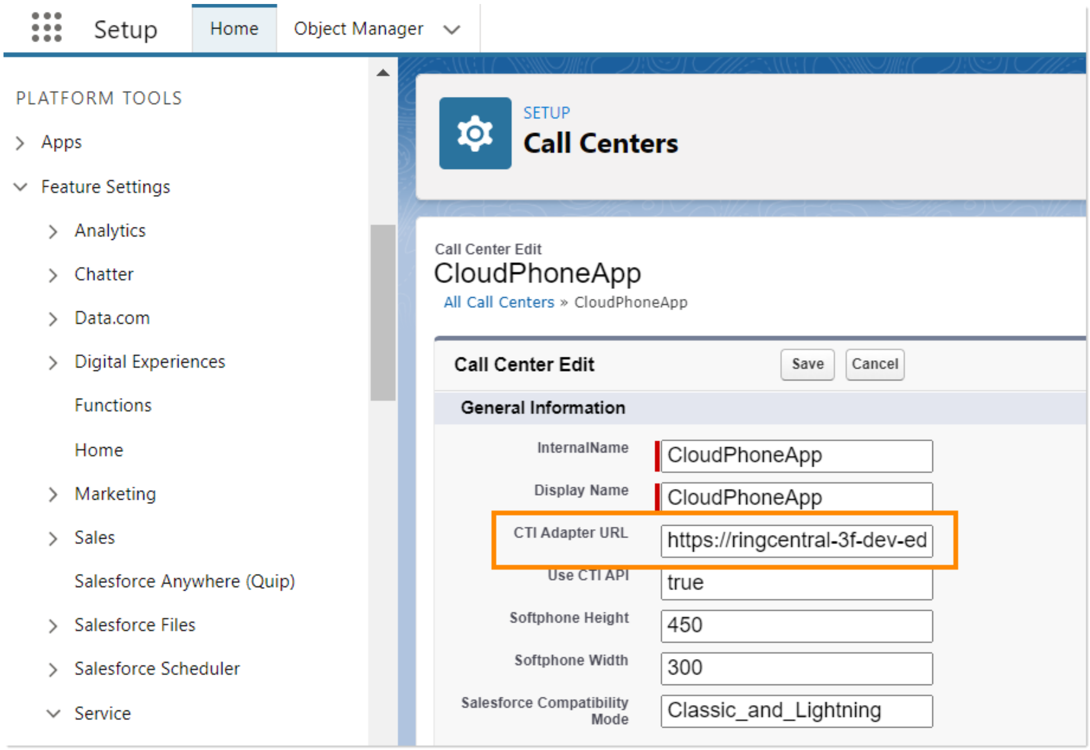
A: You can roll back to the previous version by following the steps below.

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

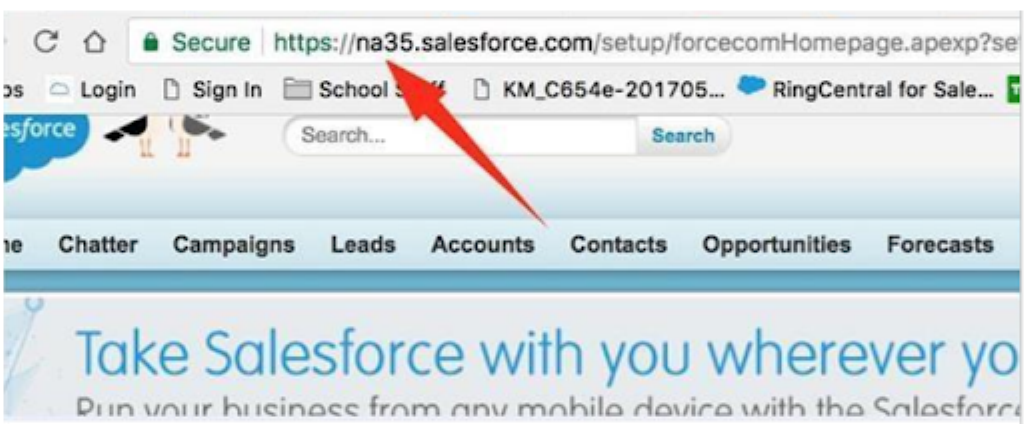


2. After the page opens in a new tab or window, copy its URL. For example, the full URL is https://c.na78.visual.force.com/apex/OpenCTIIndex500#/login. Copy the following part of the URL: https://c.na78.visual.force.com/apex/OpenCTIIndex500.
3. Close the tab and return to **Setup Home > Call Centers**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

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



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.

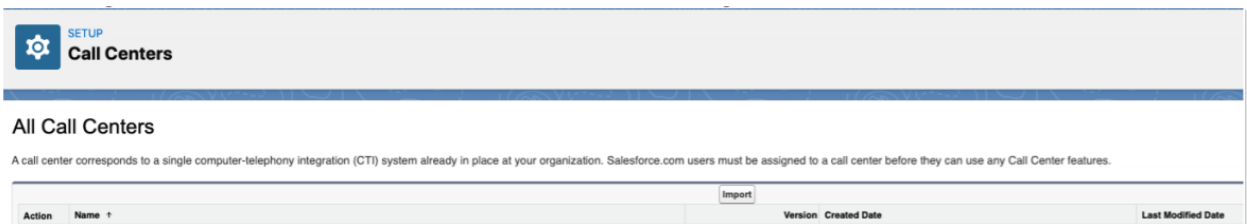
1. Copy the content below into a file and save it as RCCallCenter.xml

```
<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.