AT&T Office@Hand for Salesforce Lightning

Admin Guide

CONTENTS

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

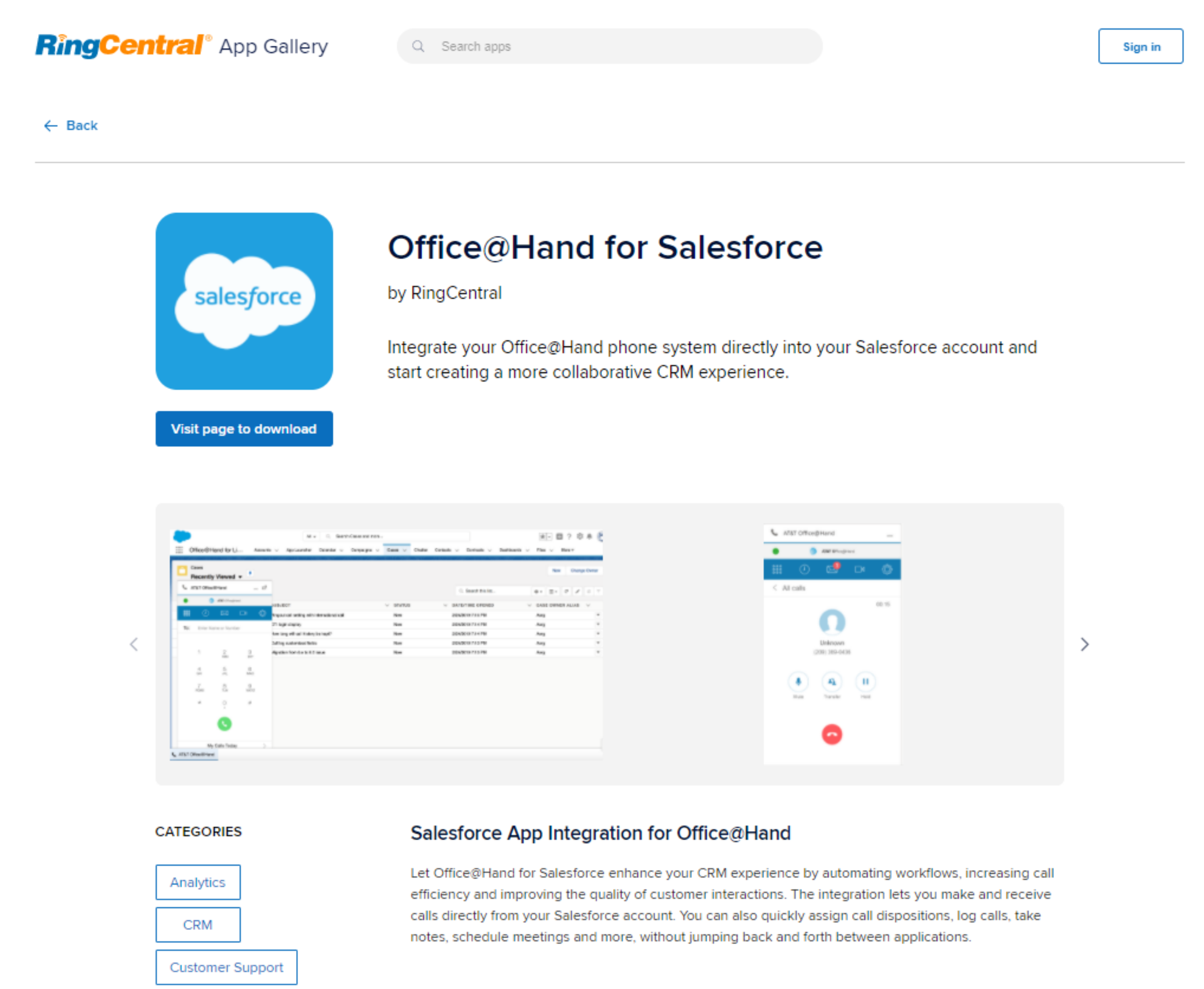
Other system requirements

- 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

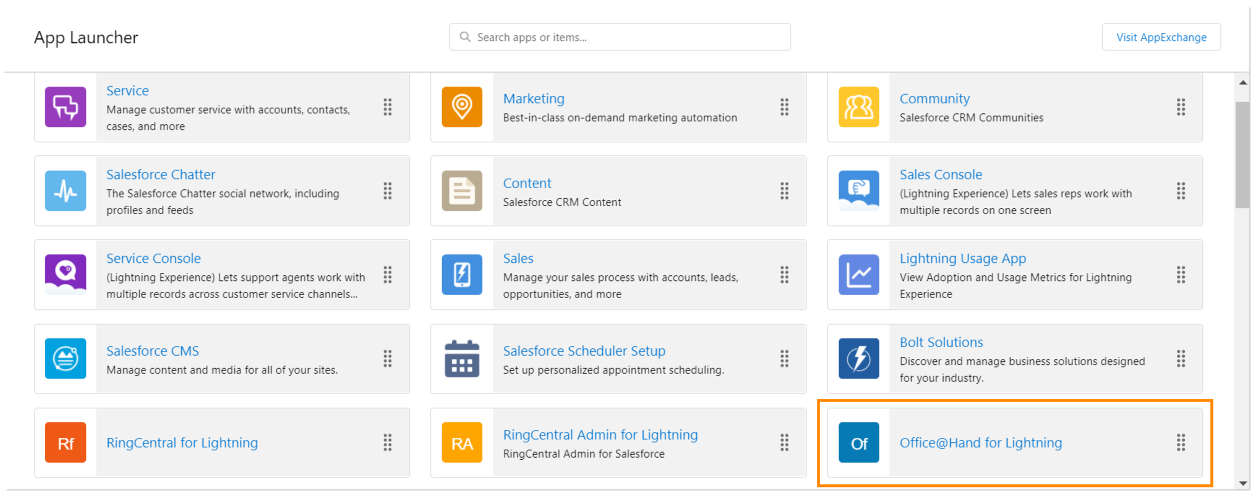
Install Office@Hand for Salesforce package from the RingCentral app gallery. Installation of this application requires an administrator login to Salesforce.com. Click **Visit page to download** to be redirected to Salesforce.com. During installation, you will be asked what subset of users to whom you wish to grant access. It is generally recommended to select **Install for All users** 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

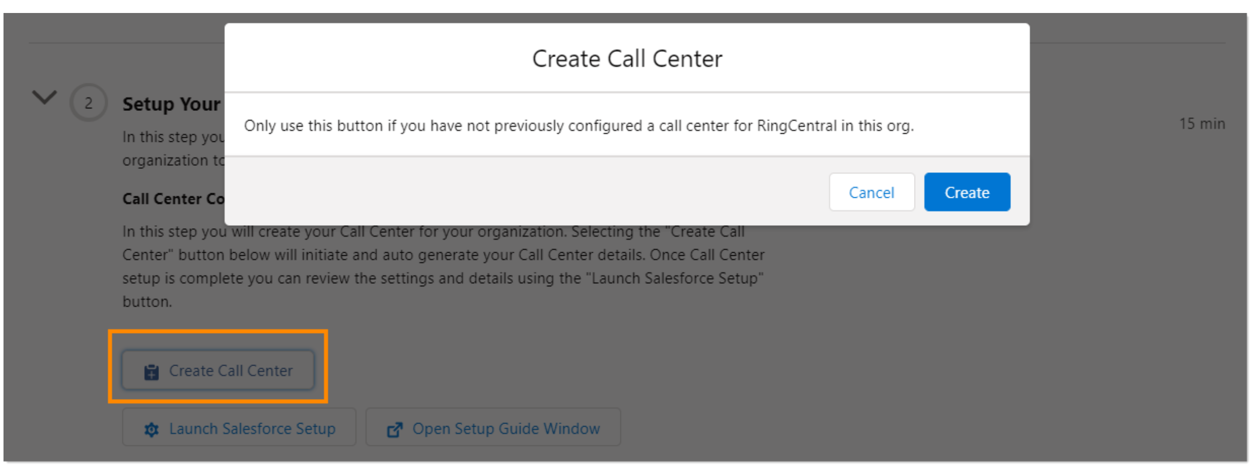
If this is the first time you have installed Office@Hand for Salesforce, you can use the new Install wizard tool to set up & configure the CTI. Please follow the steps below to access the Install wizard and start your setup and configuration.

Install wizard can be accessed by clicking on the **Office@Hand for Lightning** in the nine-dot icon Salesforce App Launcher at the top-left.



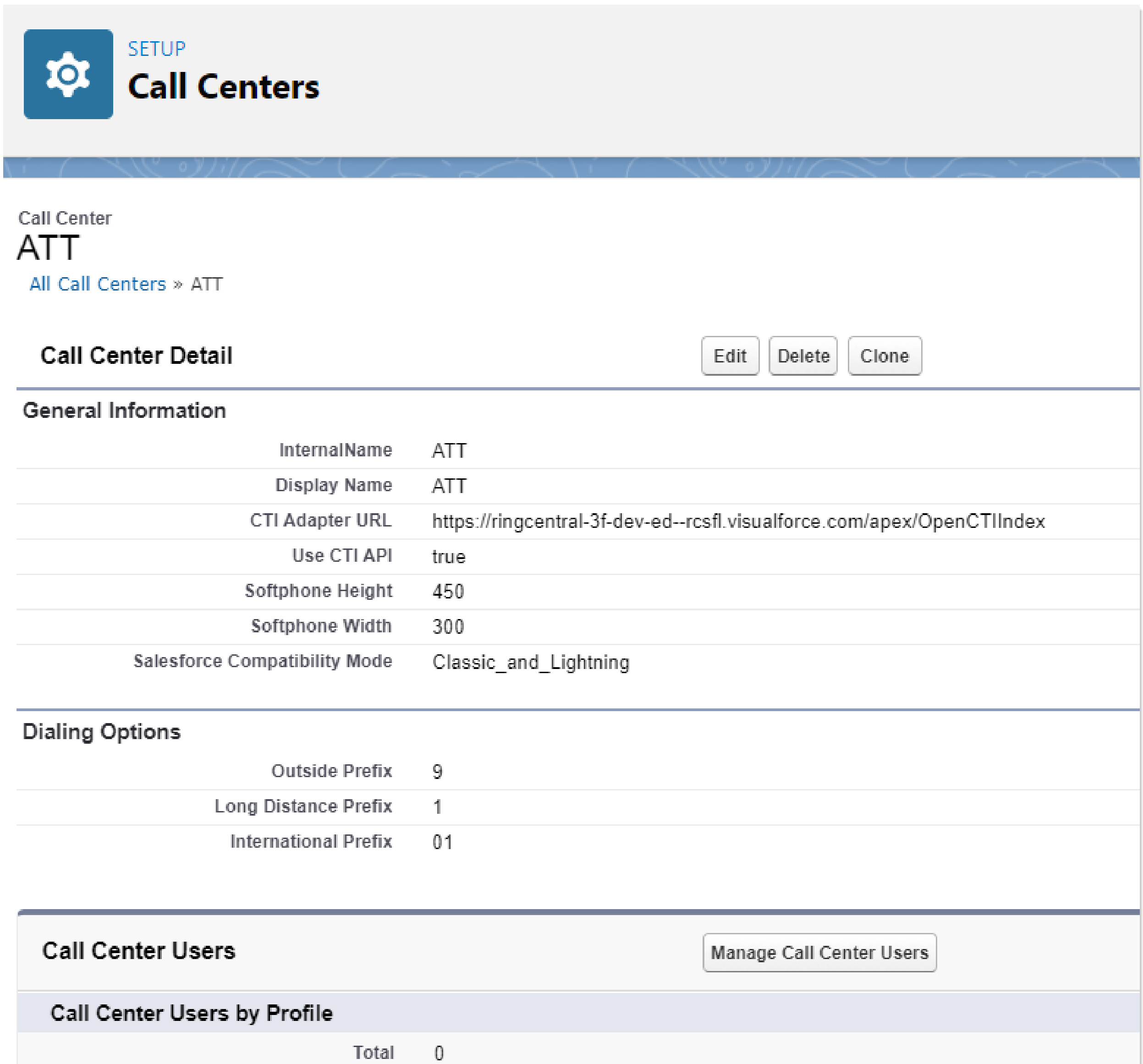
The Install wizard will guide you through all the required steps for configuring the Office@Hand for Salesforce application. The install wizard is divided into seven steps for configuring various settings.

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.



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.

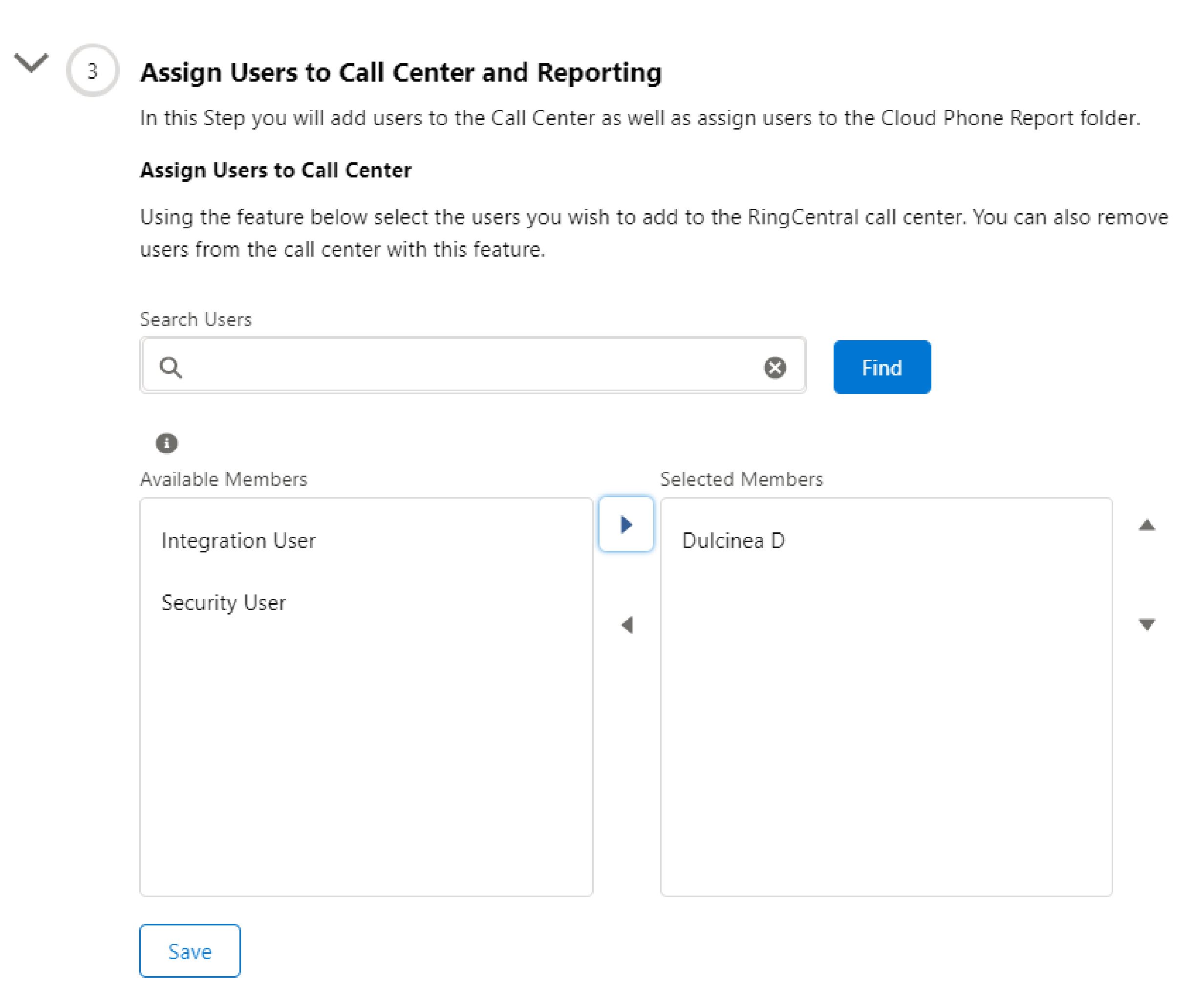


Note: The **Create Call Center** option will be disabled during upgrades. It will only be available when the application is installed for the first time.

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.

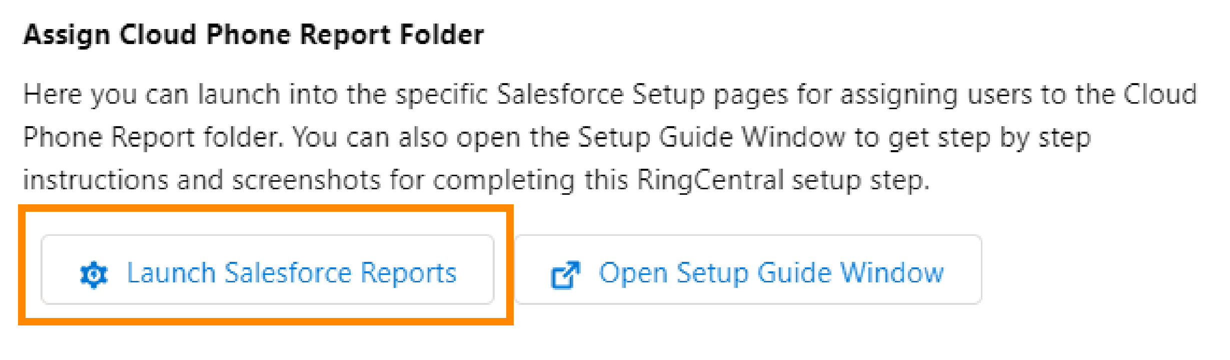
Also, you can configure to access call recordings from the logged call activity.

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.

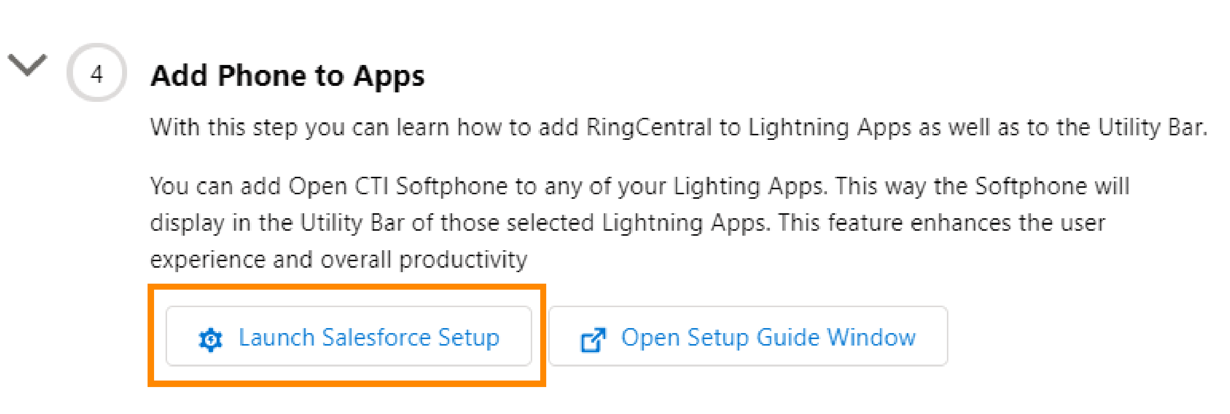


Now you are all set, and your end users will be able to start using the application. You can continue with the additional configurations as required for the organization.

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**.



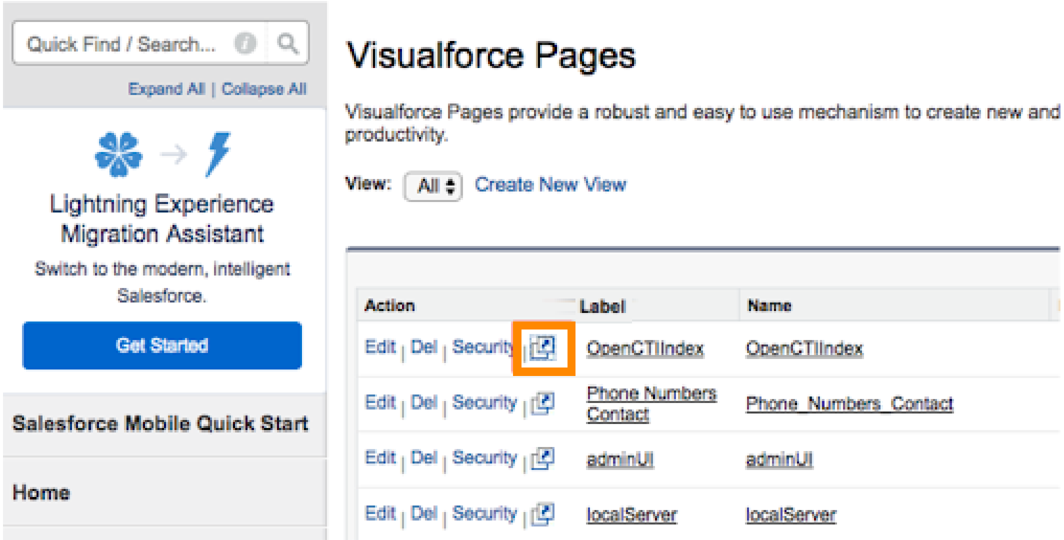
Steps 5 through 7 of the wizard walk you through enabling additional settings such as Mobile experience, Analytics, configuring softphone layout, and Admin settings for the Office@Hand app.

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

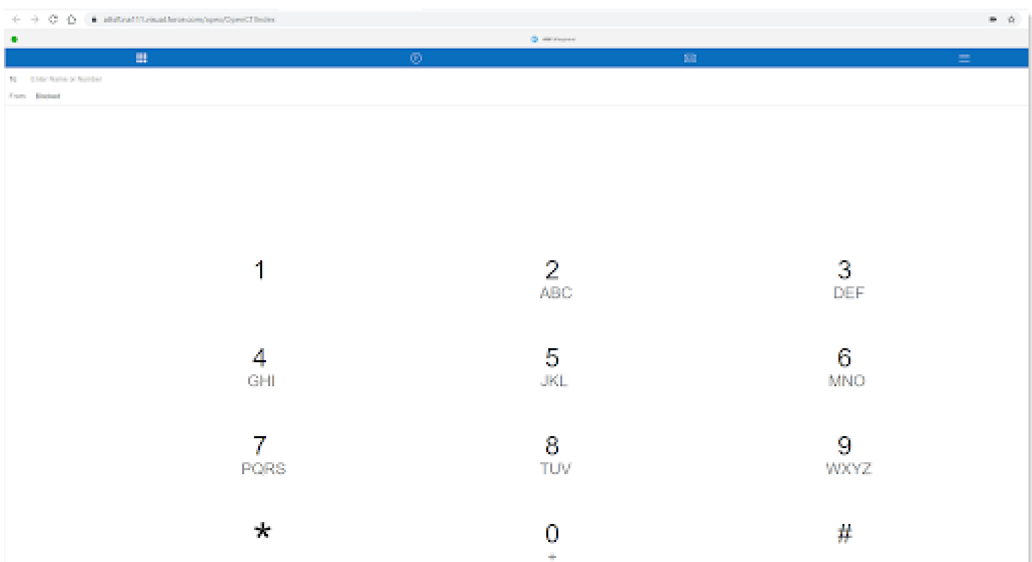
If you have already installed Office@Hand for Salesforce in the past and are upgrading to the latest version of the integration, please follow the steps below.

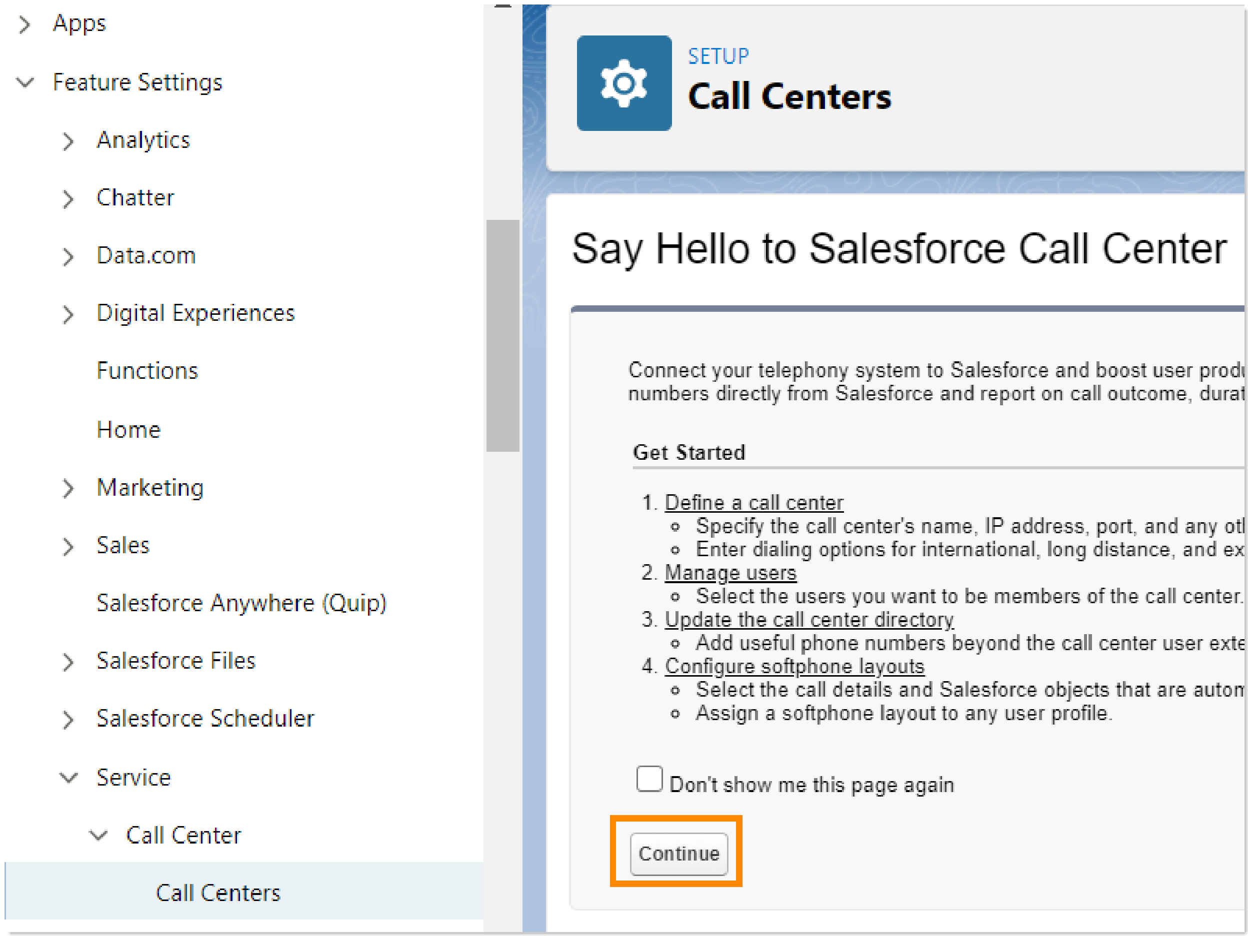
Step 2: Configure the Call Center

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

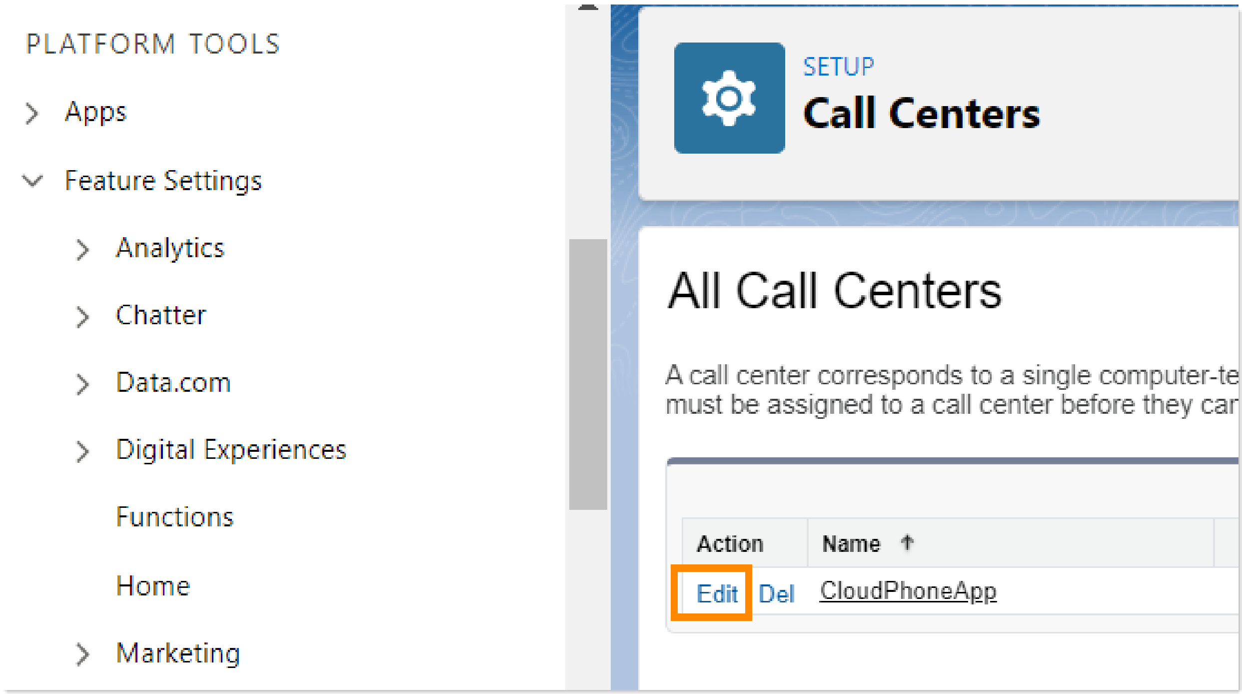


After the page opens in a new tab or window, copy its URL. For example, the full URL is https://c.na78.visual.force.com/apex/OpenCTIIndex. Close the tab and return to **Setup Home > Platform Tools > Feature Settings > Service > Call Center > Call Centers** and click **Continue**.



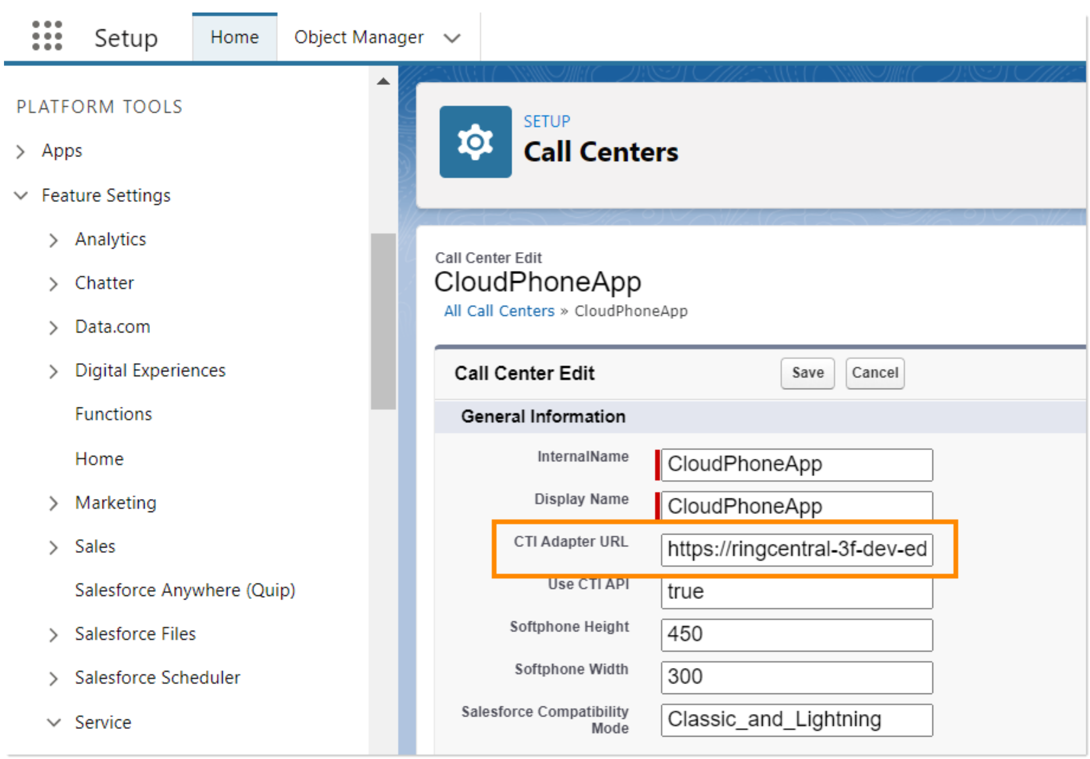


Select the name of the call center you previously set up and click **Edit**.

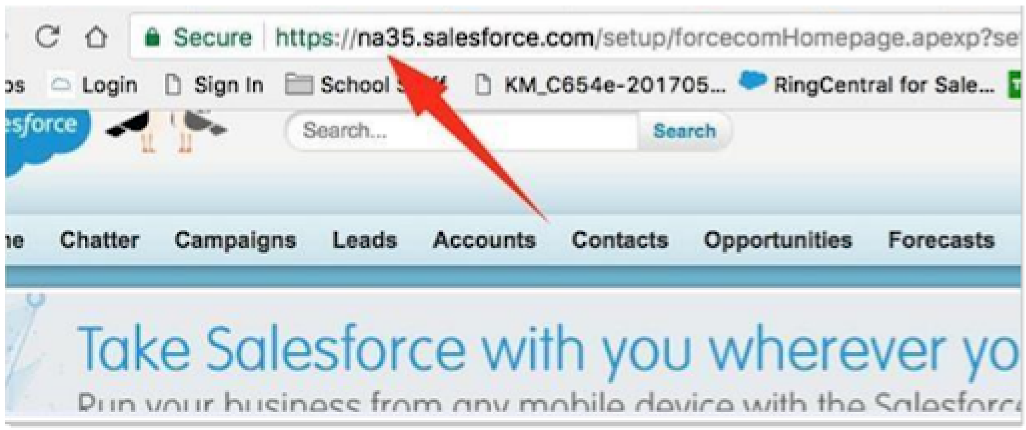


Note: If there is no call center, refer to the Troubleshooting section to manually create the Call Center.

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

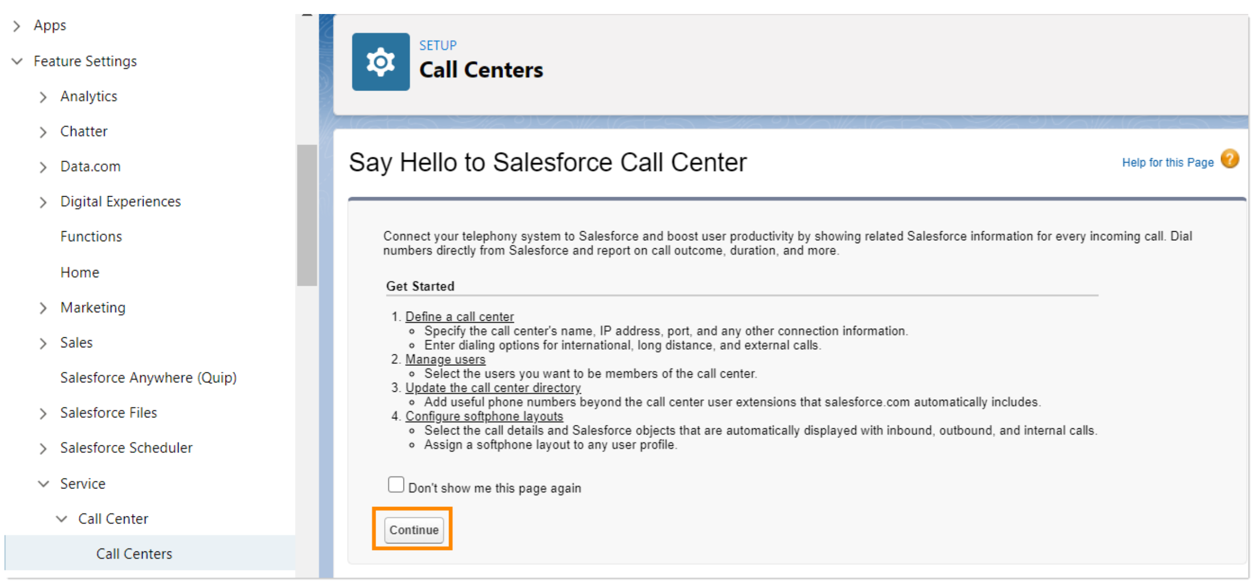


Note: In case you are not using a custom URL, follow the same steps and make sure the Salesforce POD# in Call Center URL (na35 in this example) matches with the Call Center where Salesforce Org resides. Your Salesforce POD# is specified in the browser address bar after you log in to Salesforce.



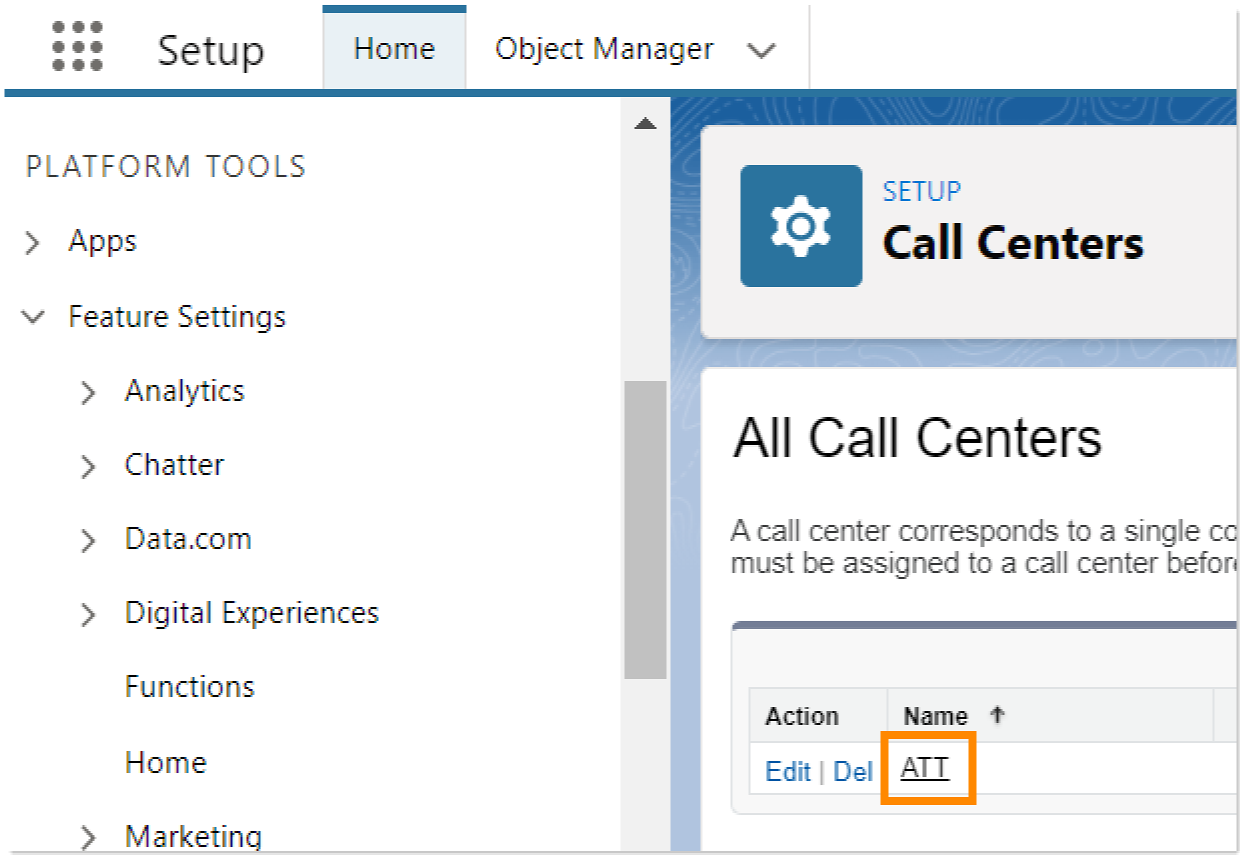
Step 3: Add Users to the Call Center

Navigate to **Setup** > **Home** > **Platform Tools** > **Feature Settings** > **Service** > **Call Center** > **Call Centers** and click **Continue**.



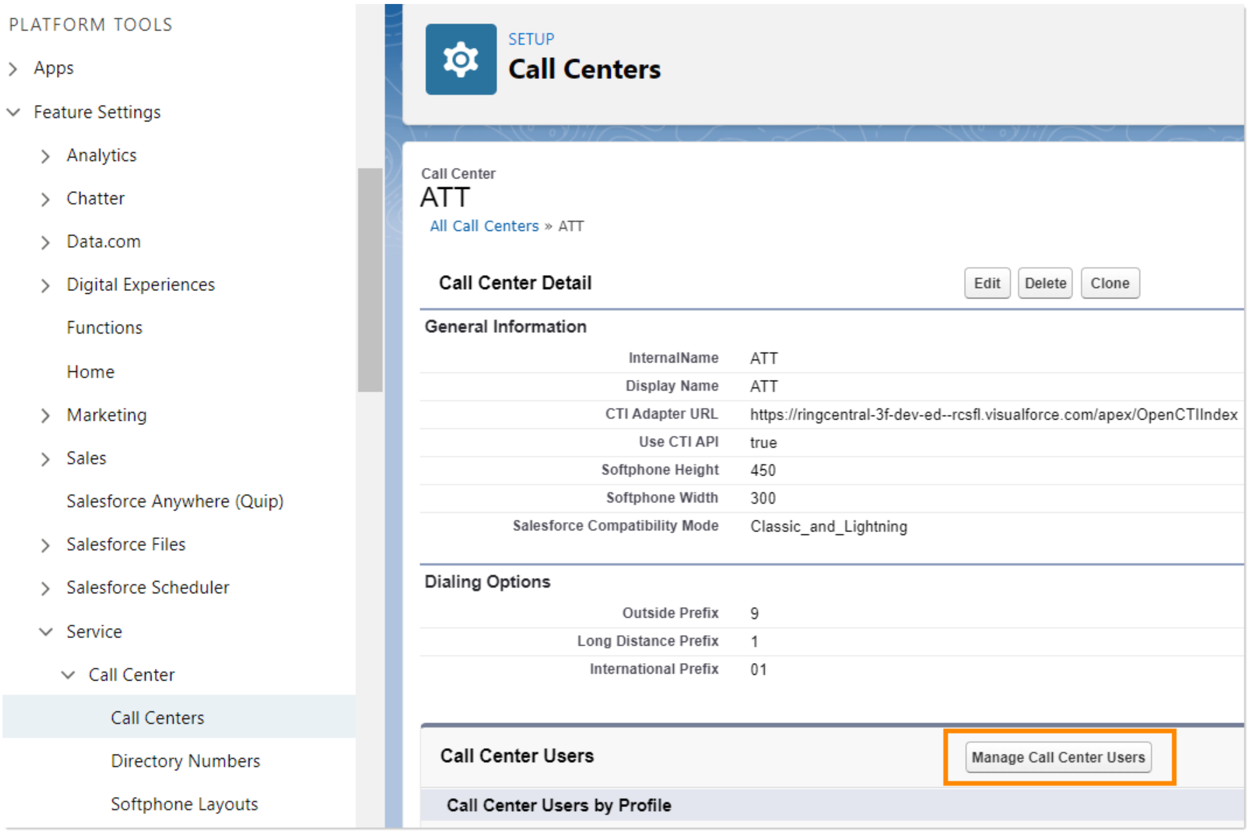
Select the call center and click on the name of the Call Center you set up in [Steps for setup and configurations for first-time installation](#).

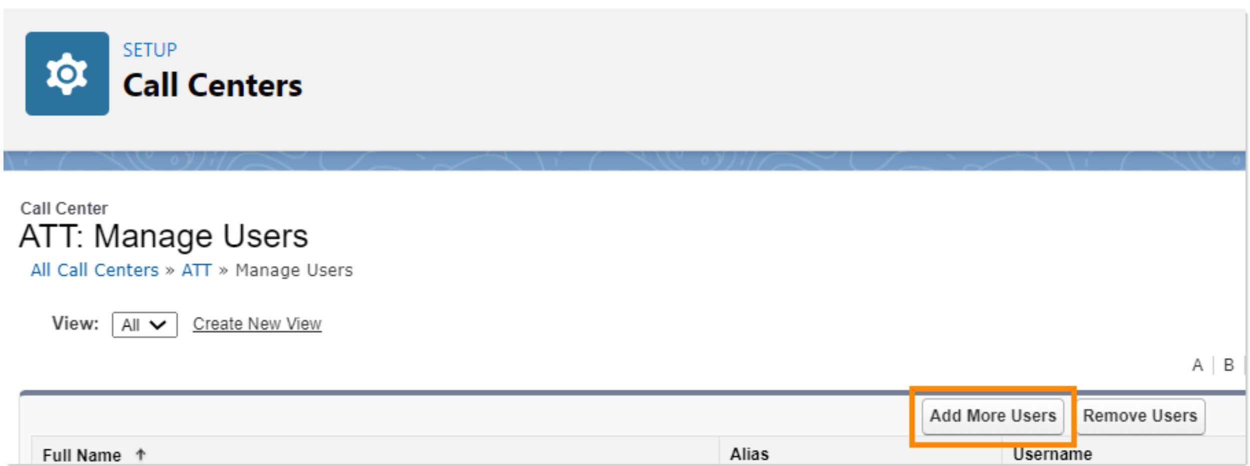
Note: The name could be different, for example, **Cloud Phone App**, depending on the Salesforce.



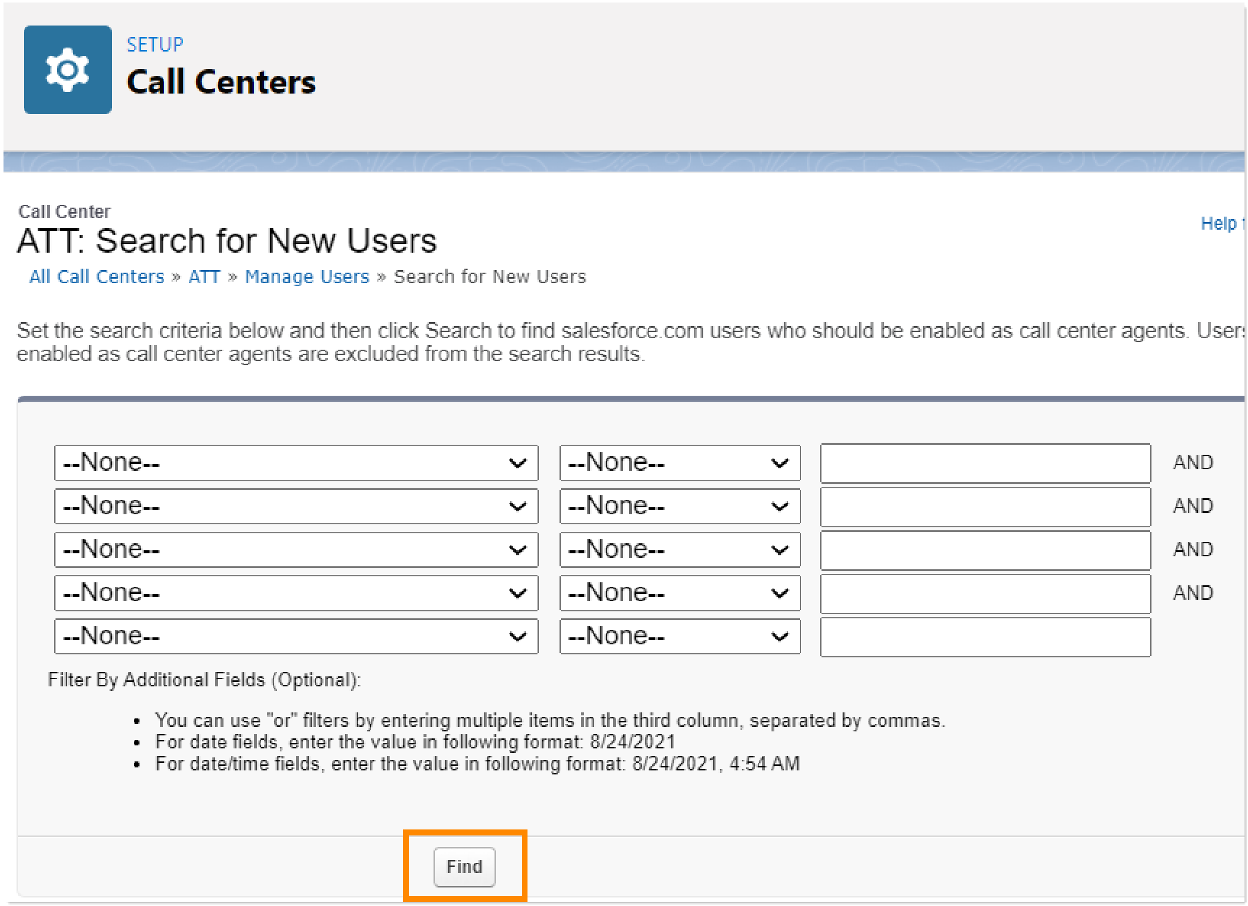
Upon clicking the call center name, you will see the Call Center details. It is not necessary to edit this Call Center definition. From here, you can add users to this Call Center using the **Manage Call Center Users** button, which opens the **Manage Users** screen.

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





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

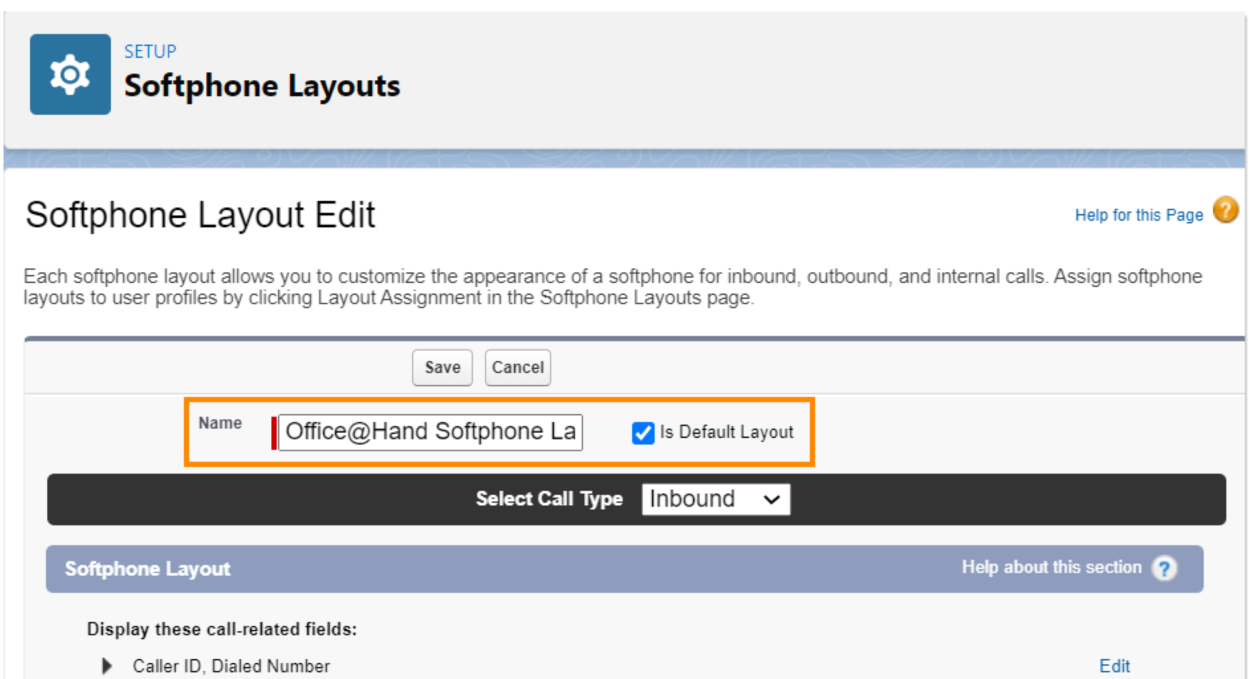

SETUP
Call Centers
Call Center
ATT: Search for New Users
Help
All Call Centers » ATT » Manage Users » Search for New Users
Set the search criteria below and then click Search to find salesforce.com users who should be enabled as call center agents. Users enabled as call center agents are excluded from the search results.
--None--
AND
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: 8/24/2021
For date/time fields, enter the value in following format: 8/24/2021, 4:54 AM
Find

Setting up SoftPhone Layouts in Salesforce

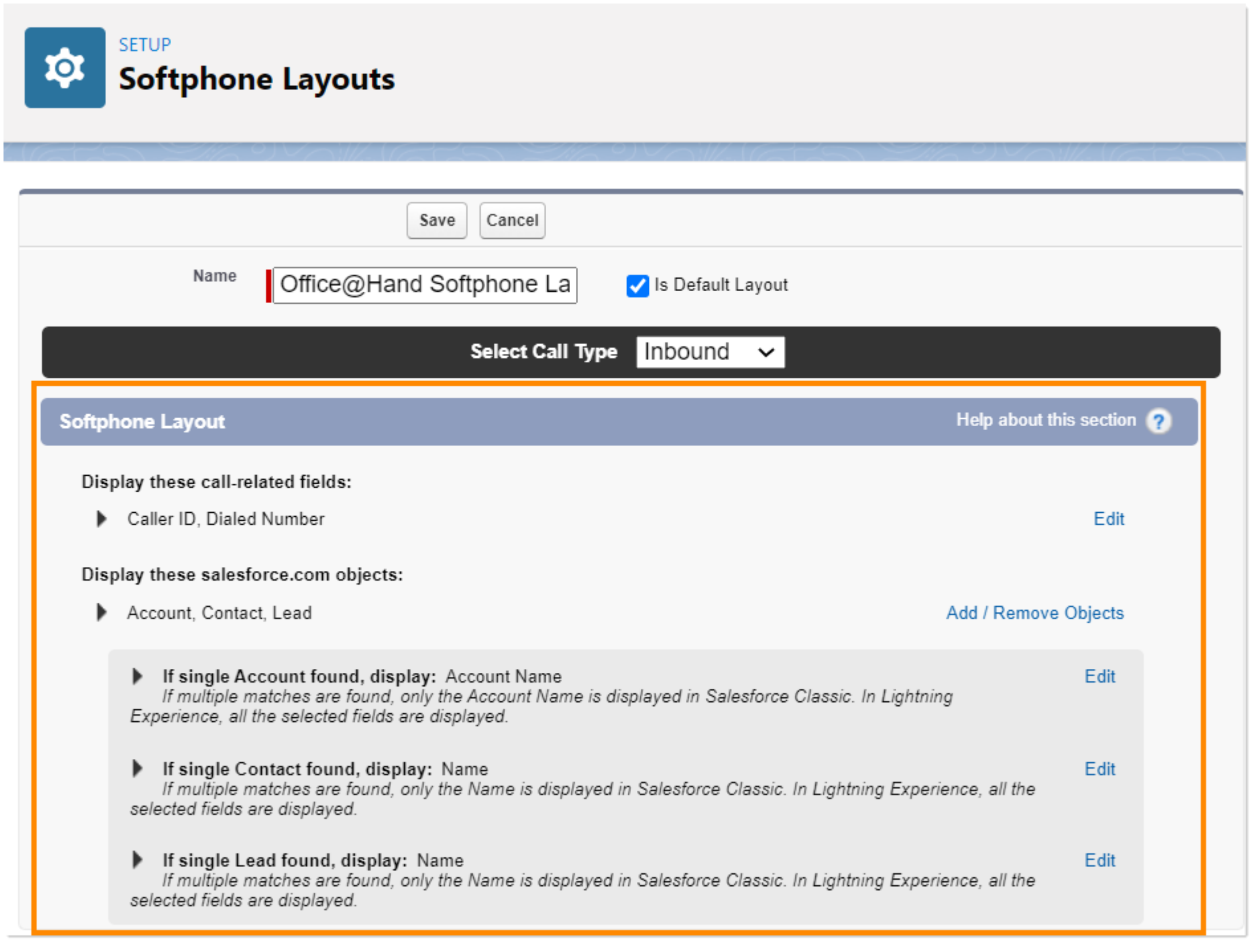
Step 1: Set up a SoftPhone Layout

From the left-hand side menu, navigate to **Setup Home > Platform Tools > Feature Settings > Service > 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.

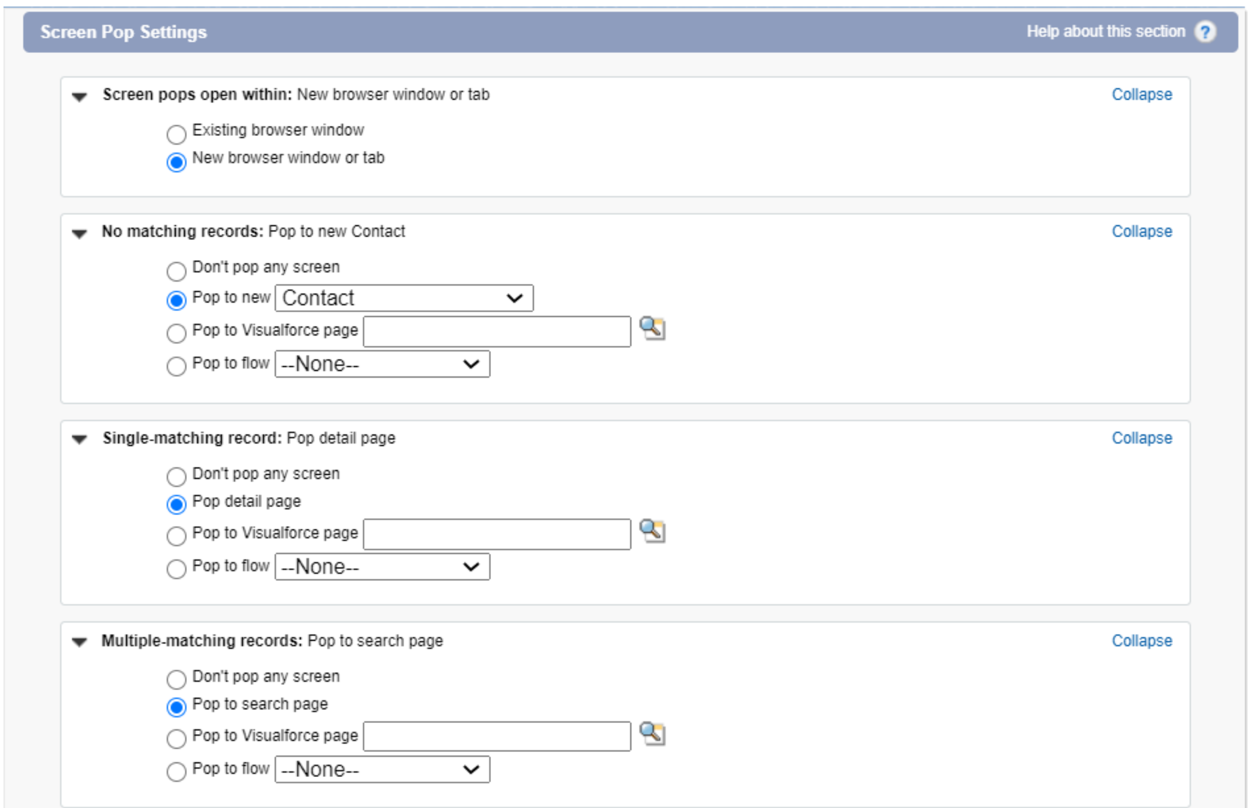


Also, select the other Softphone layout options.

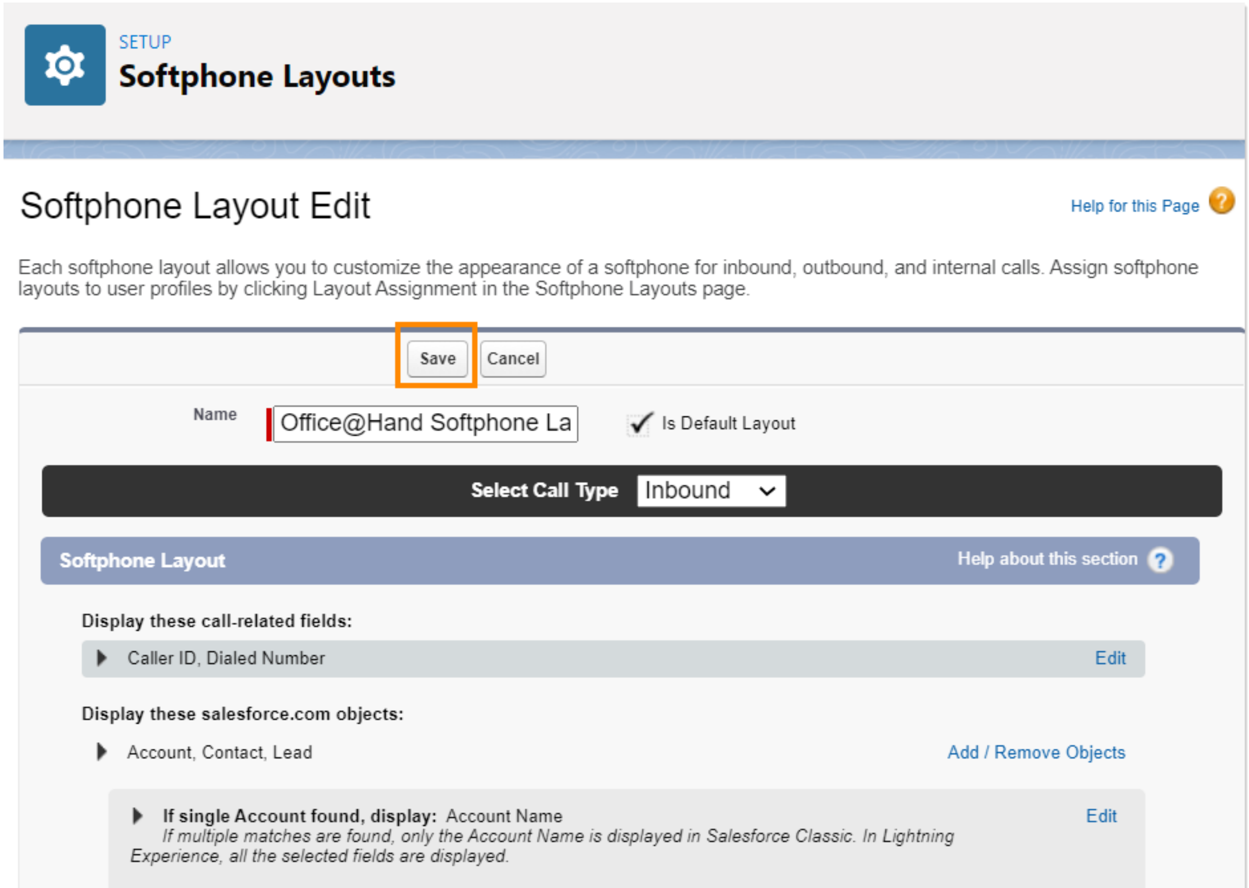

SETUP
Softphone Layouts
Save
Cancel
Name
Office@Hand Softphone La
Is Default Layout
Select Call Type
Inbound
Softphone Layout
Help about this section
Display these call-related fields:
Caller ID, Dialed Number
Edit
Display these salesforce.com objects:
Account, Contact, Lead
Add / Remove Objects
If single 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
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.
Edit
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.
Edit

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 that does not match an 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.

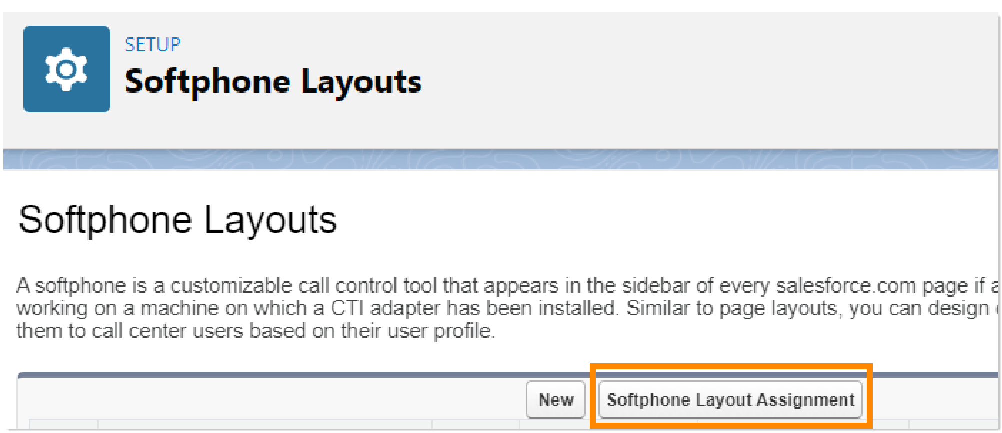


Click the **Save** button at the top.



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](), "Open CTI for Lightning 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

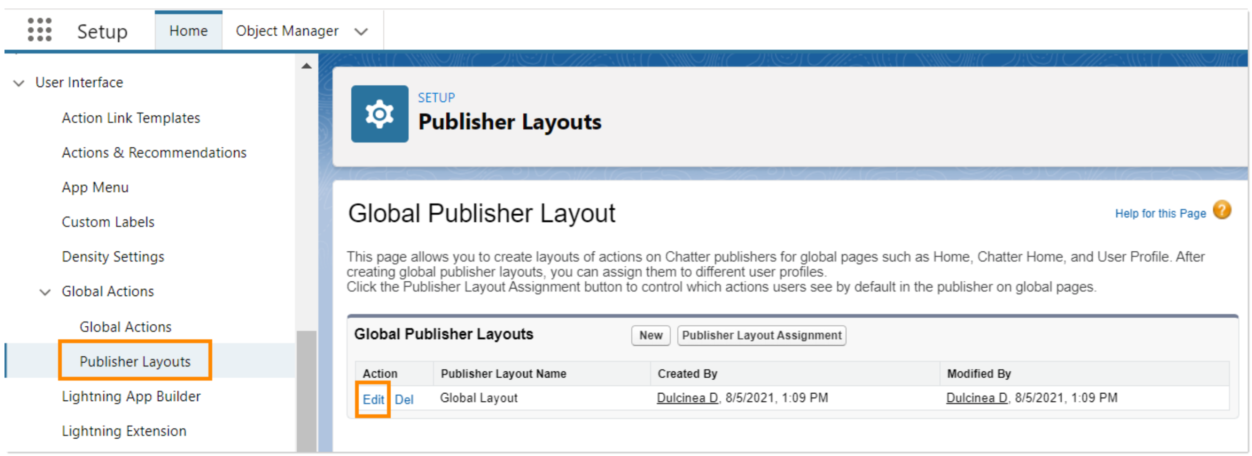
Setting up Global Action Layout in Salesforce

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

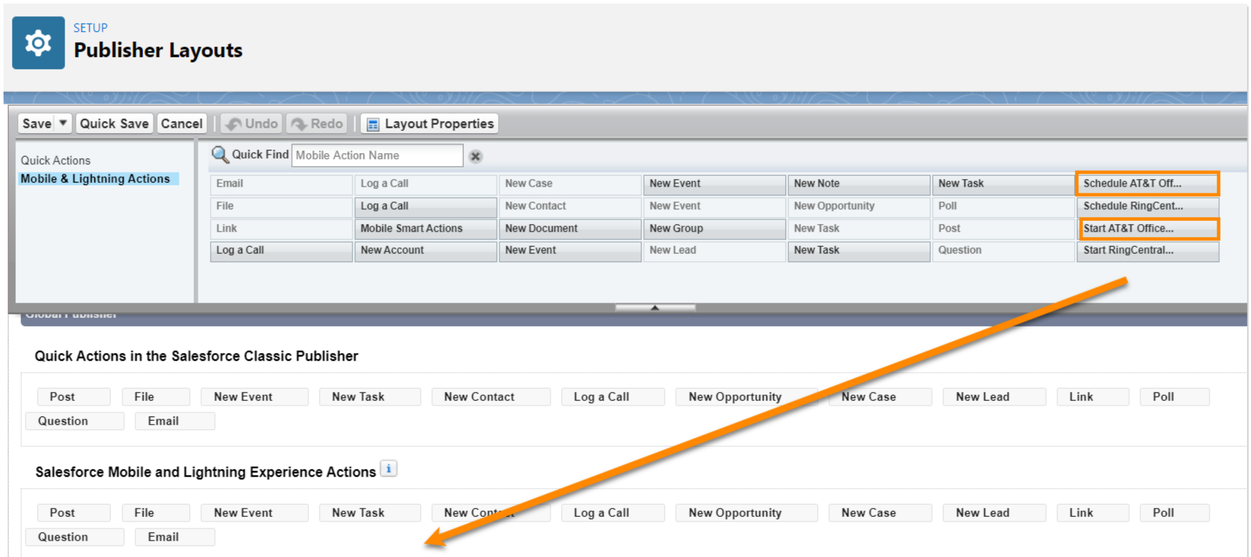
Navigate to **Setup Home >Platform Tools > User Interface > Global Actions > Publisher Layouts**.

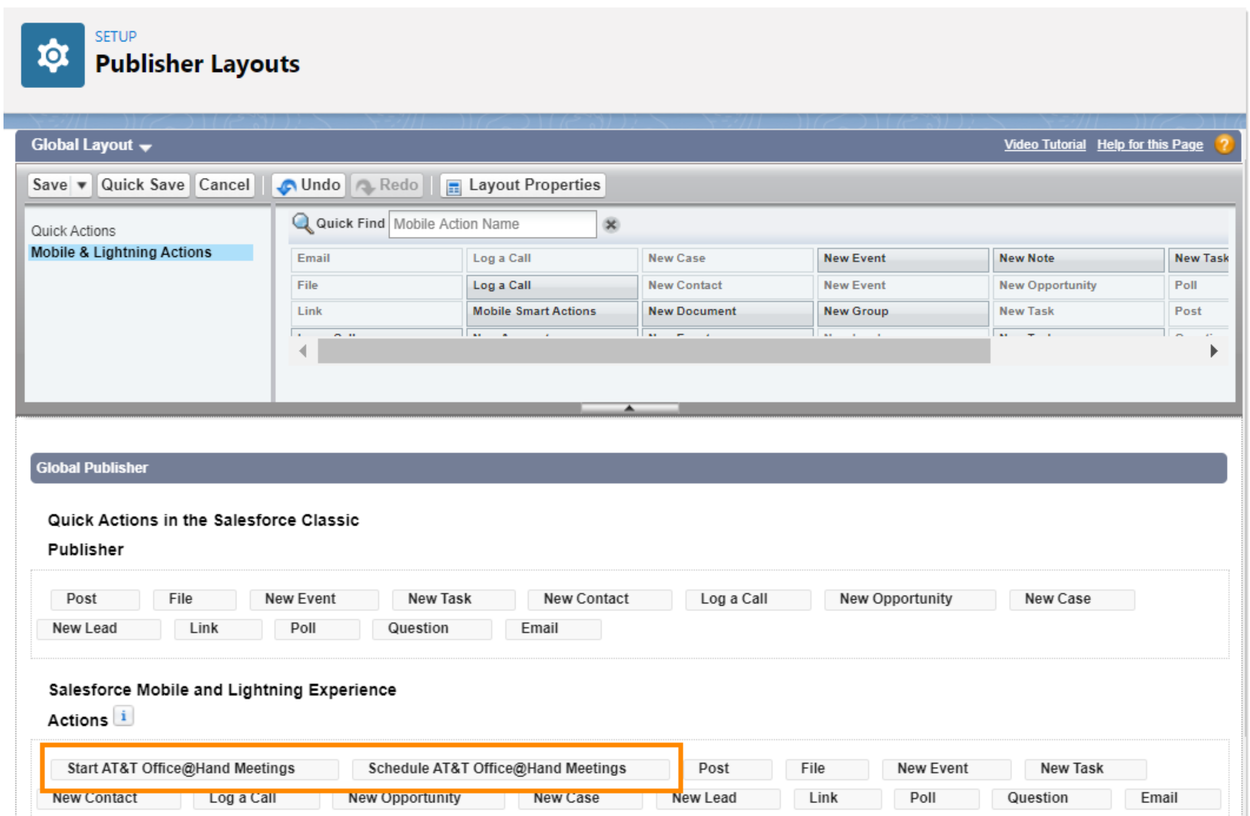
Choose the Layout that you want to configure, then click **Edit**.



Step 2: Configure the layout

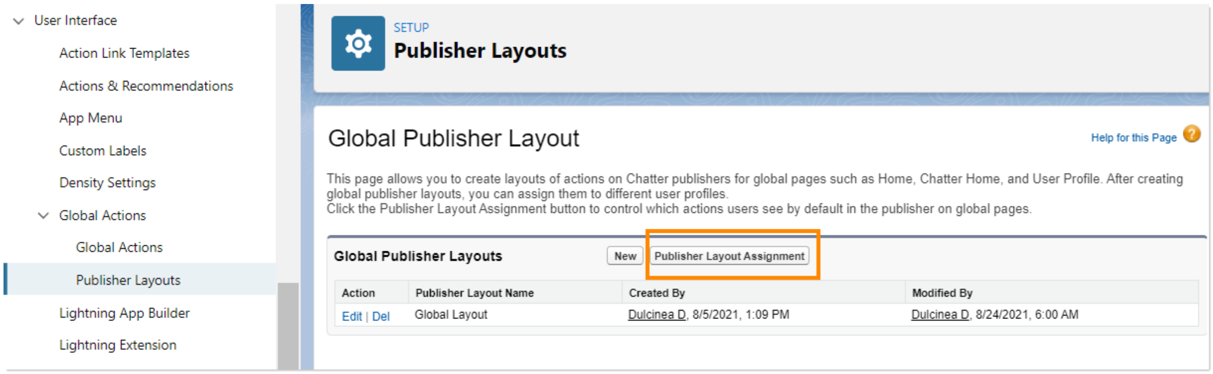
Click **Mobile and Lightning Actions**, drag the **Start RingCentral Video meeting** and **Schedule RingCentral Video meeting** to the **Salesforce Mobile and Lightning Experience Actions** list at the bottom. Reorder the list as needed, then click **Save**.





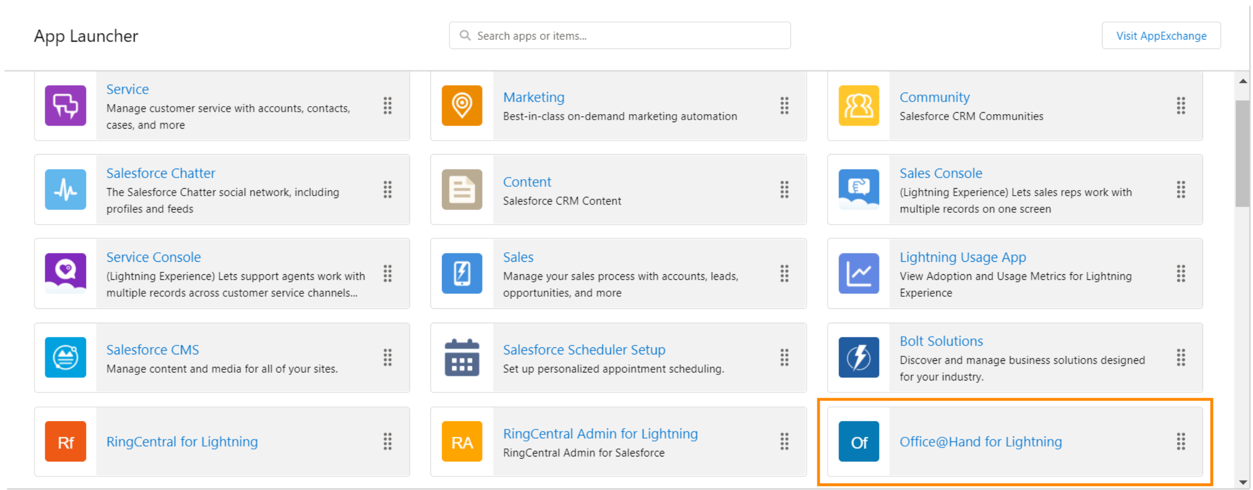
Step 3: Assign to roles

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.

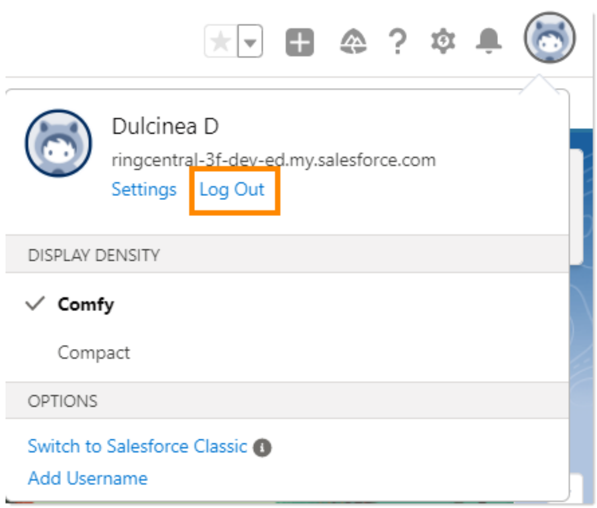

User Interface
Action Link Templates
Actions & Recommendations
App Menu
Custom Labels
Density Settings
Global Actions
Global Actions
Publisher Layouts
Lightning App Builder
Lightning Extension
SETUP
Publisher Layouts
Global Publisher Layout
Help for this Page
This page allows you to create layouts of actions on Chatter publishers for global pages such as Home, Chatter Home, and User Profile. After creating global publisher layouts, you can assign them to different user profiles.
Click the Publisher Layout Assignment button to control which actions users see by default in the publisher on global pages.
Global Publisher Layouts
New
Publisher Layout Assignment
Action
Publisher Layout Name
Created By
Modified By
Edit | Del
Global Layout
Dulcinea D, 8/5/2021, 1:09 PM
Dulcinea D, 8/24/2021, 6:00 AM

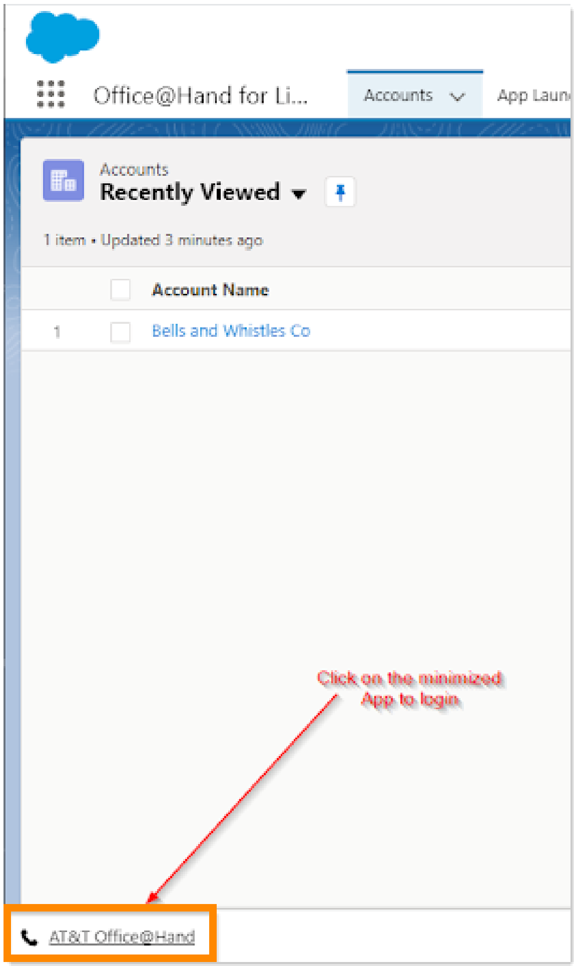
Launching app in Lightning View

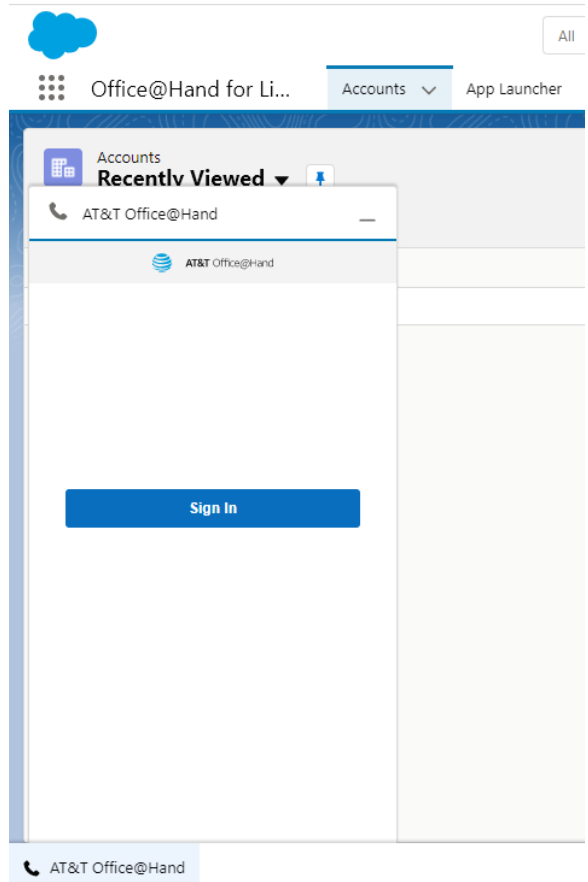
As your basic installation and configuration is complete, it's time to launch the Office@Hand for Lightning app. The app can be accessed from the App Launcher.



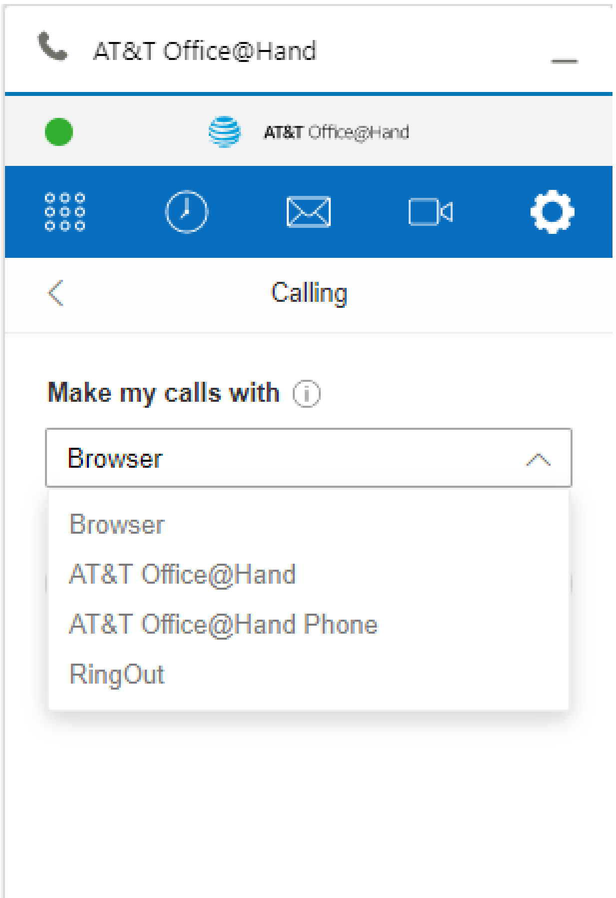
Before Launching the Office@Hand for Lightning app, log out and log in again.

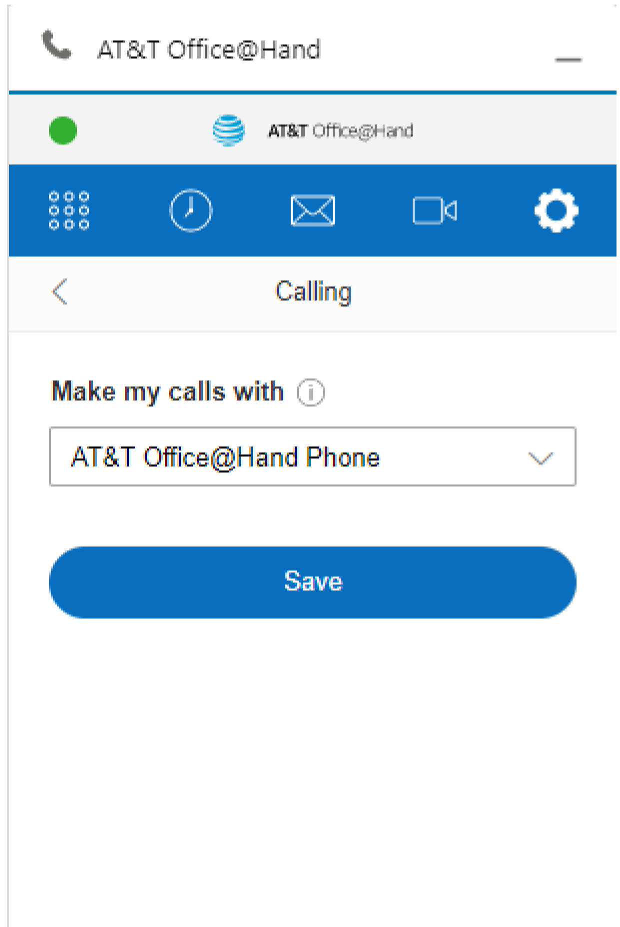



Office@Hand for Li...
Accounts
App Laun
Accounts
Recently Viewed
1 item • Updated 3 minutes ago
Account Name
Bells and Whistles Co
Click on the minimized App to login
AT&T Office@Hand


All
Office@Hand for Li...
Accounts
App Launcher
Accounts
Recently Viewed
AT&T Office@Hand
Sign In
AT&T Office@Hand

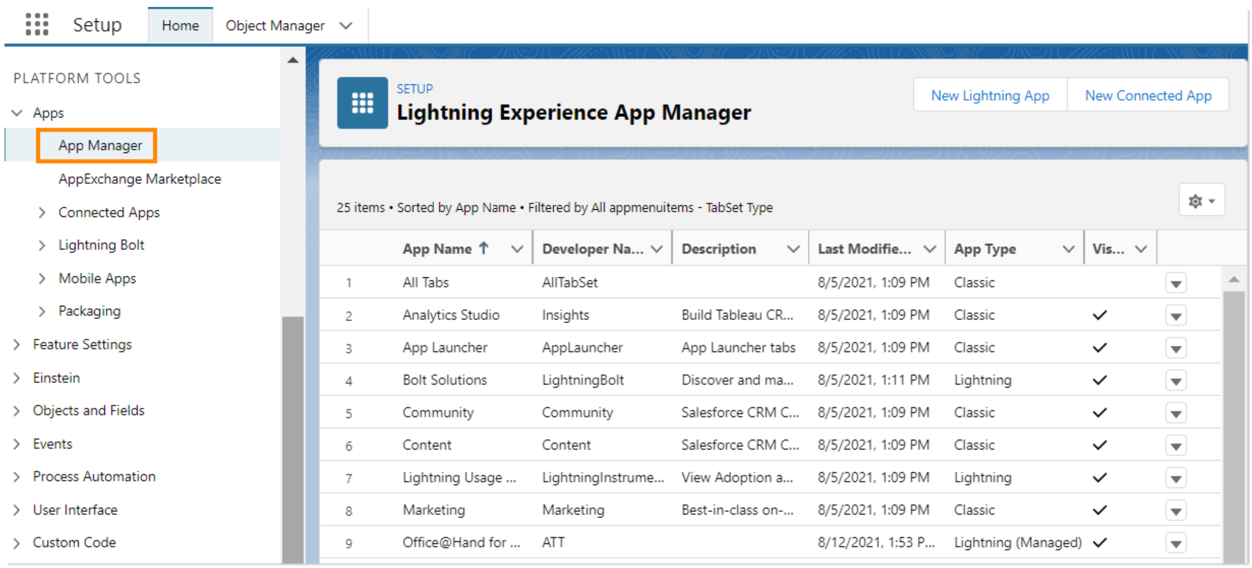
Click the button, and you'll see the Office@Hand app. After signing in, configure the outbound dialing option in setup.



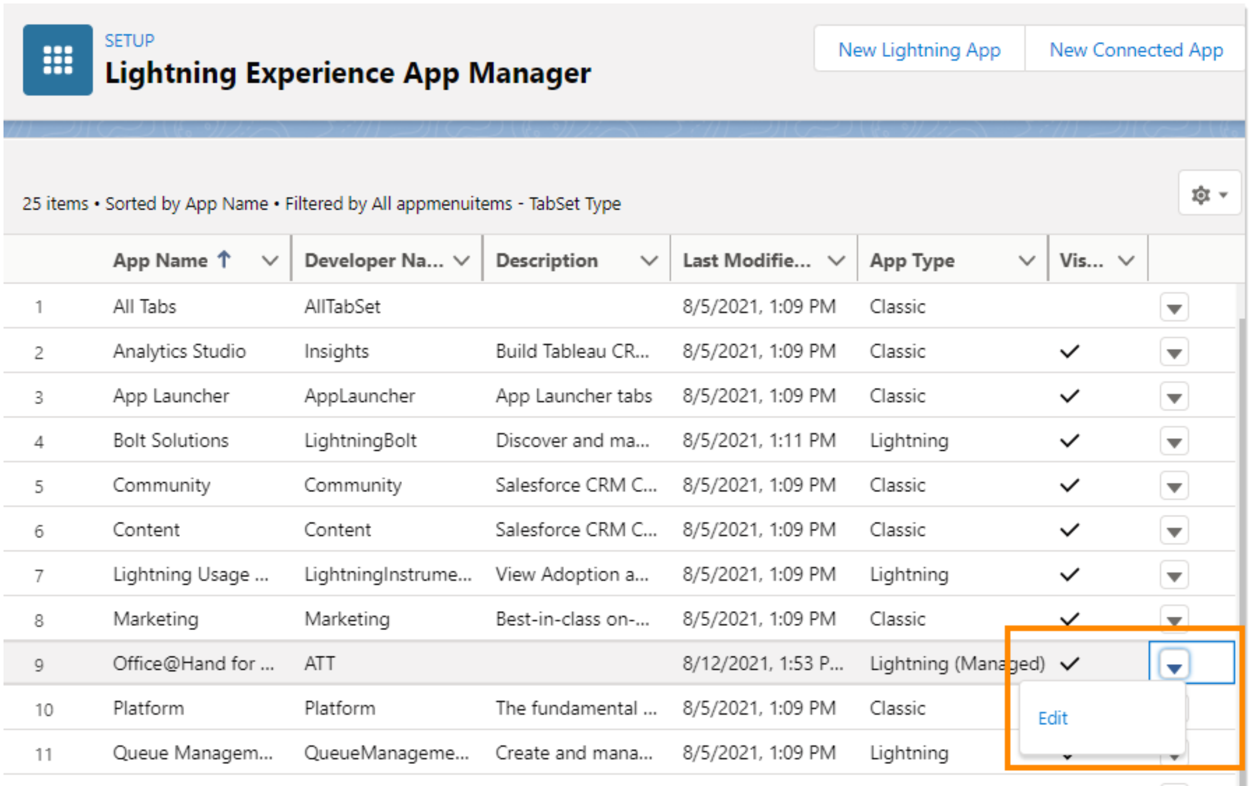


Add Open CTI Softphone to Your Lightning App

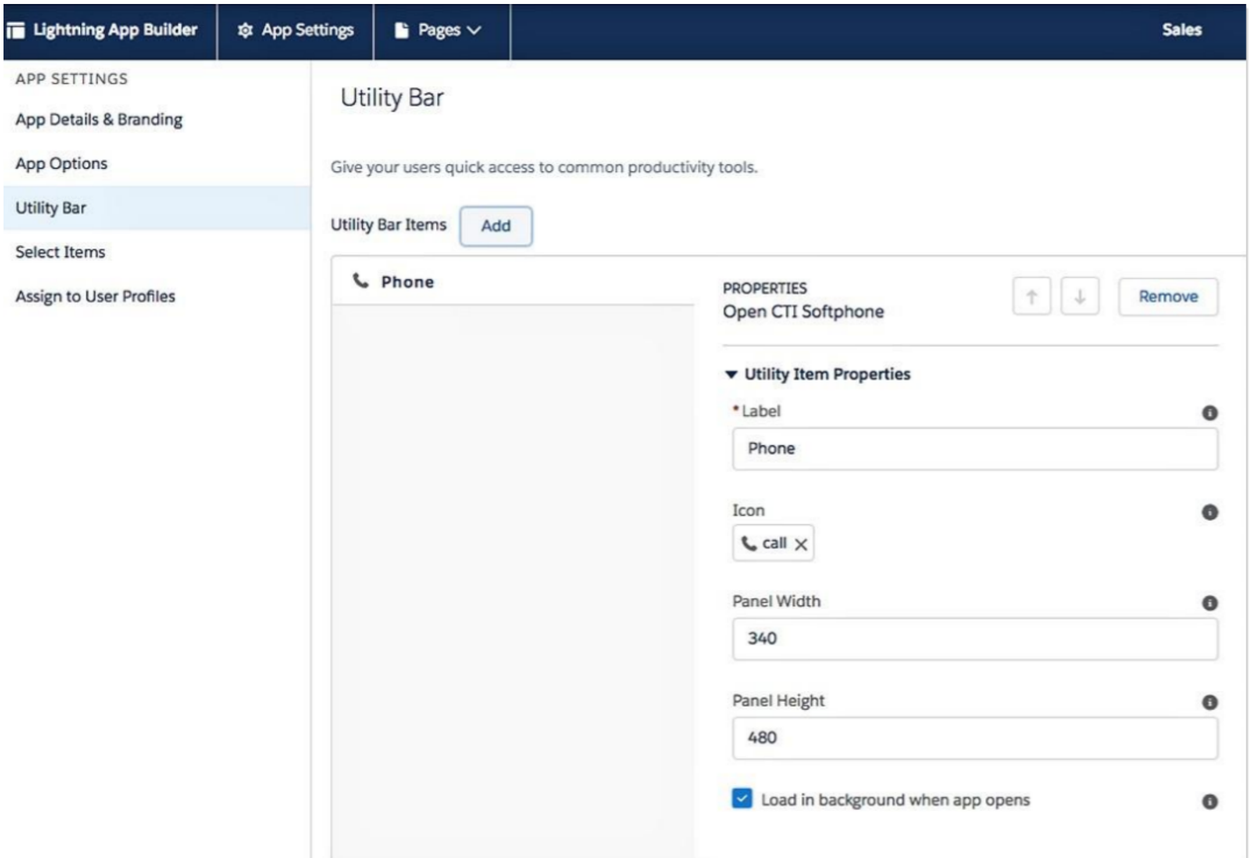
You can add CTI to any of your Lighting apps. Navigate to **Setup Home > Platform Tools > Apps > App Manager**.



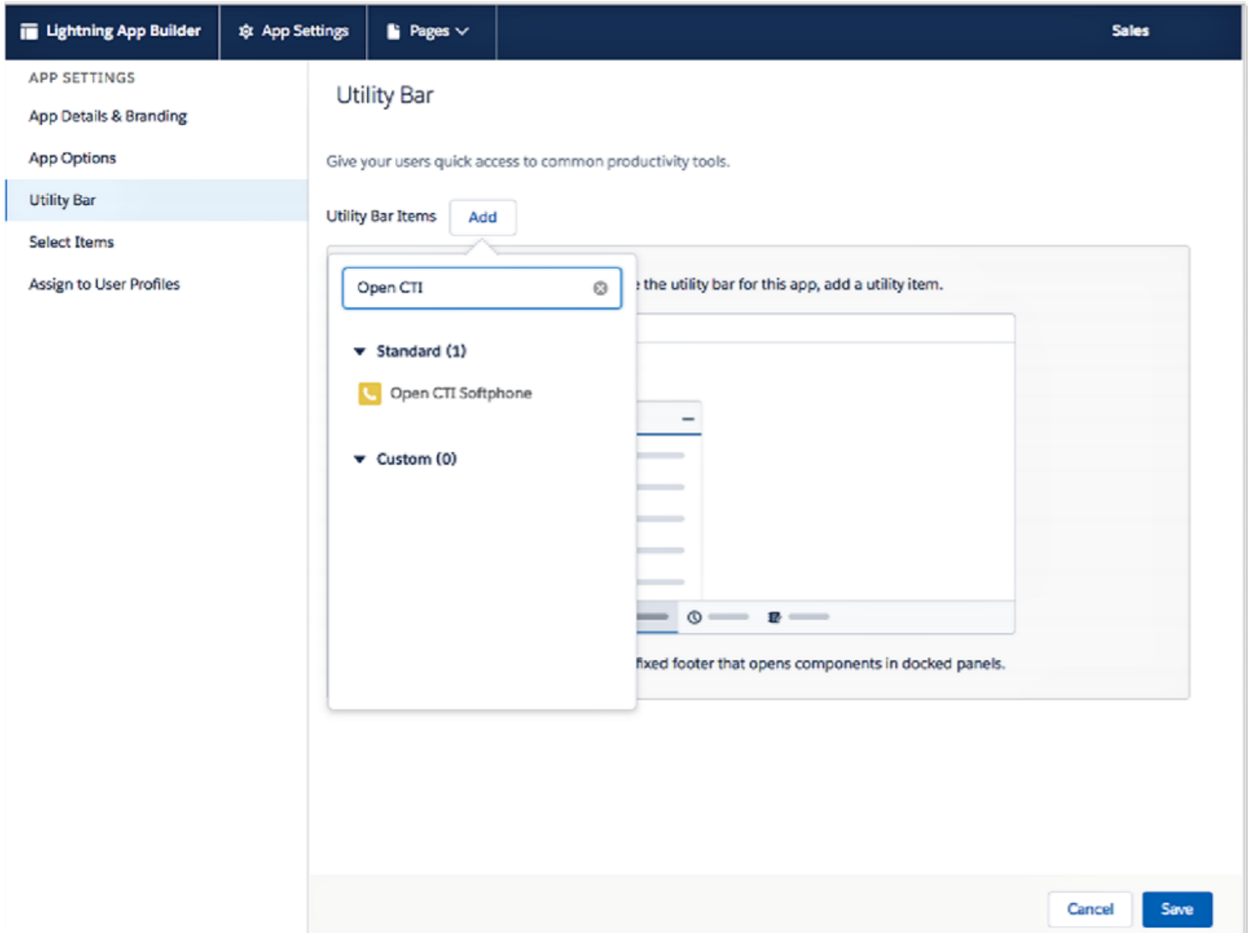
Click the dropdown arrow at the far right of the Lightning app you wish to add to the Office@hand app, and click **Edit**.



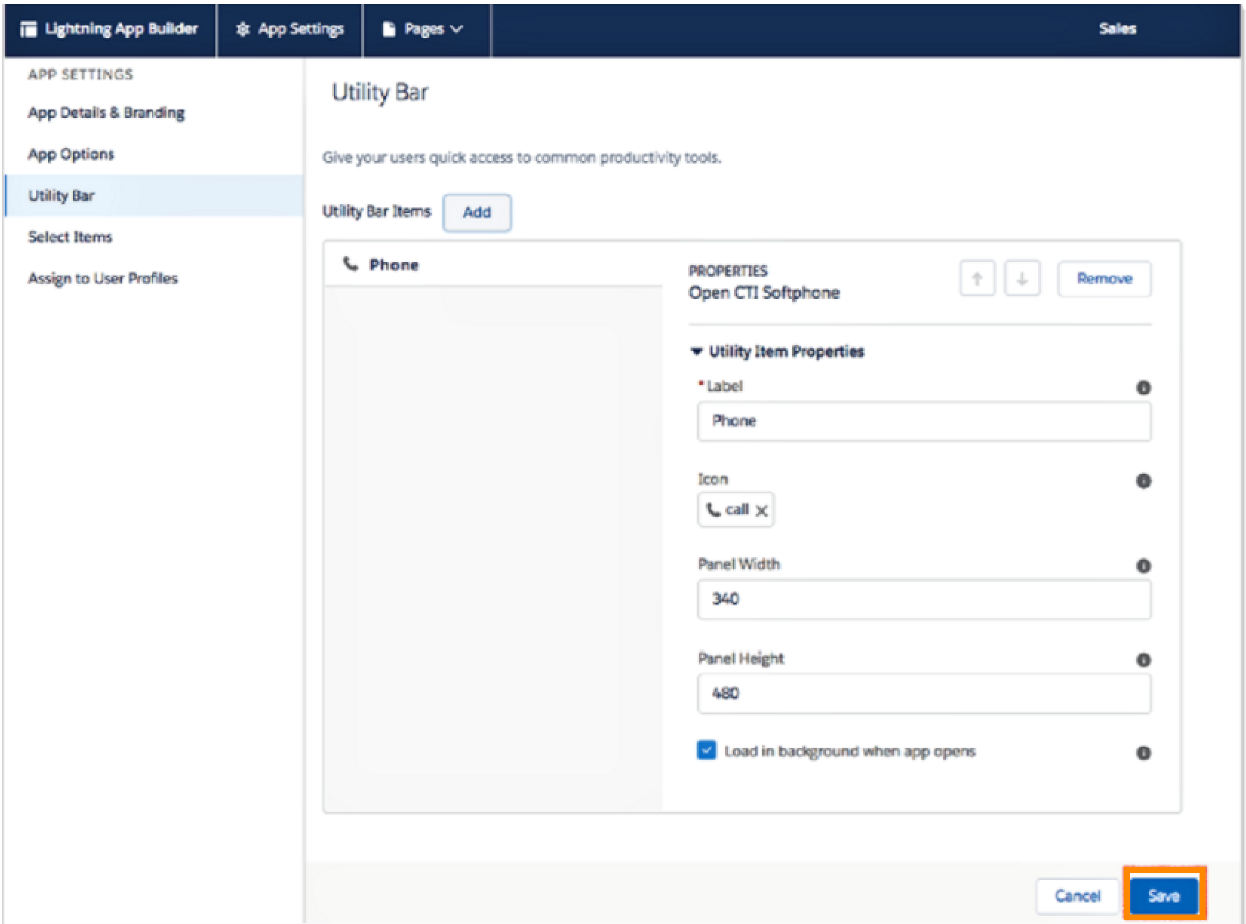
Open the **Utility Bar** tab and click **Add**.


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
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**.



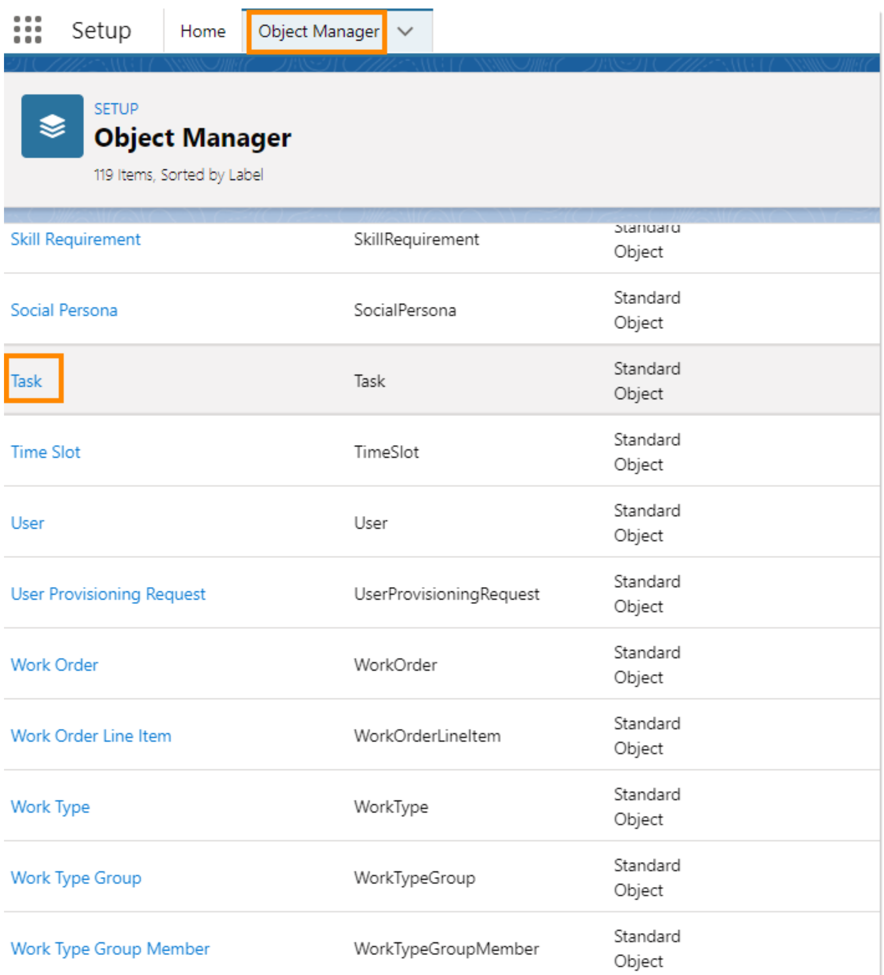
Launch the app from **App Launcher**, and you'll see the Office@Hand app in the **Utility Bar**.

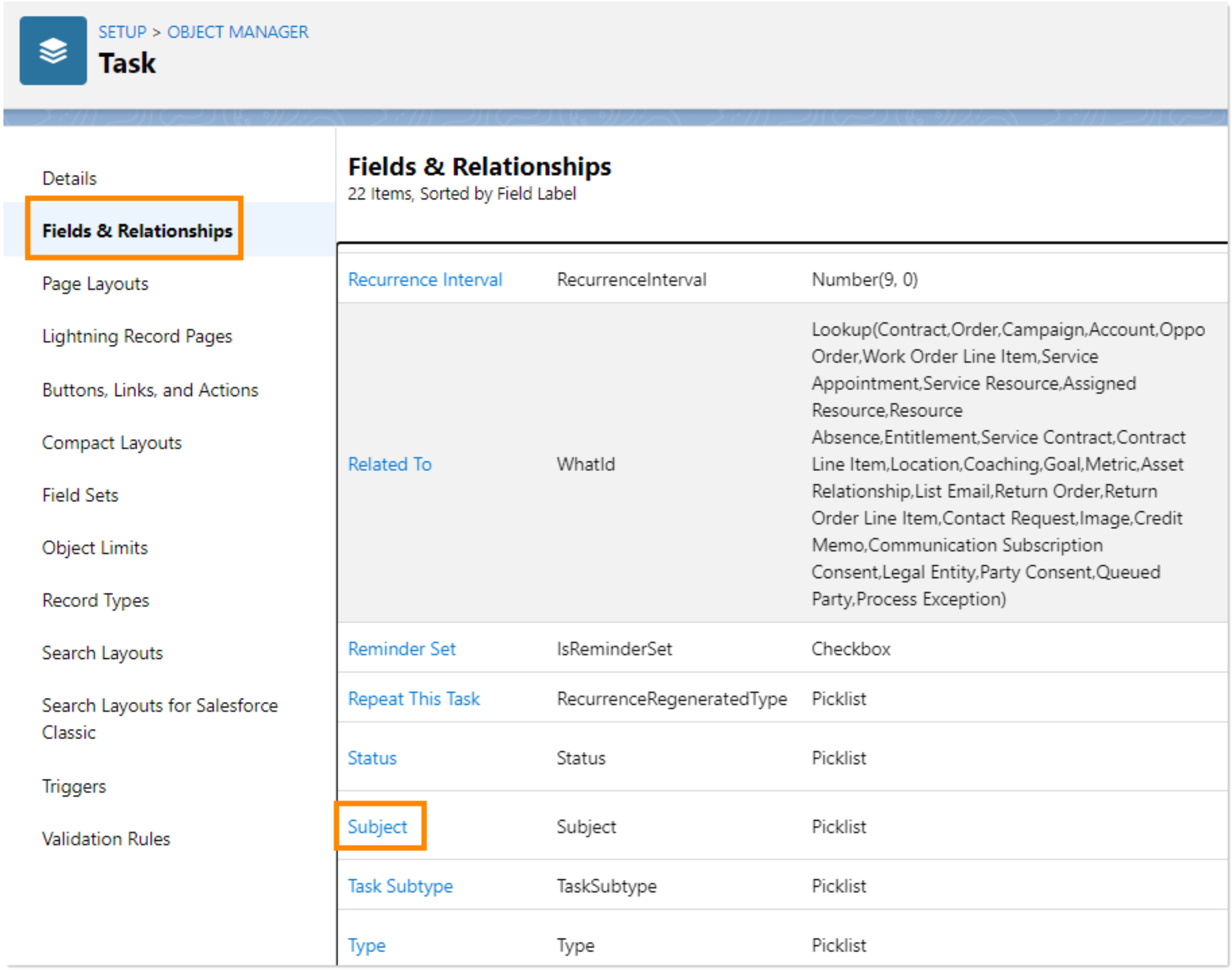


Setting up preset call dispositions

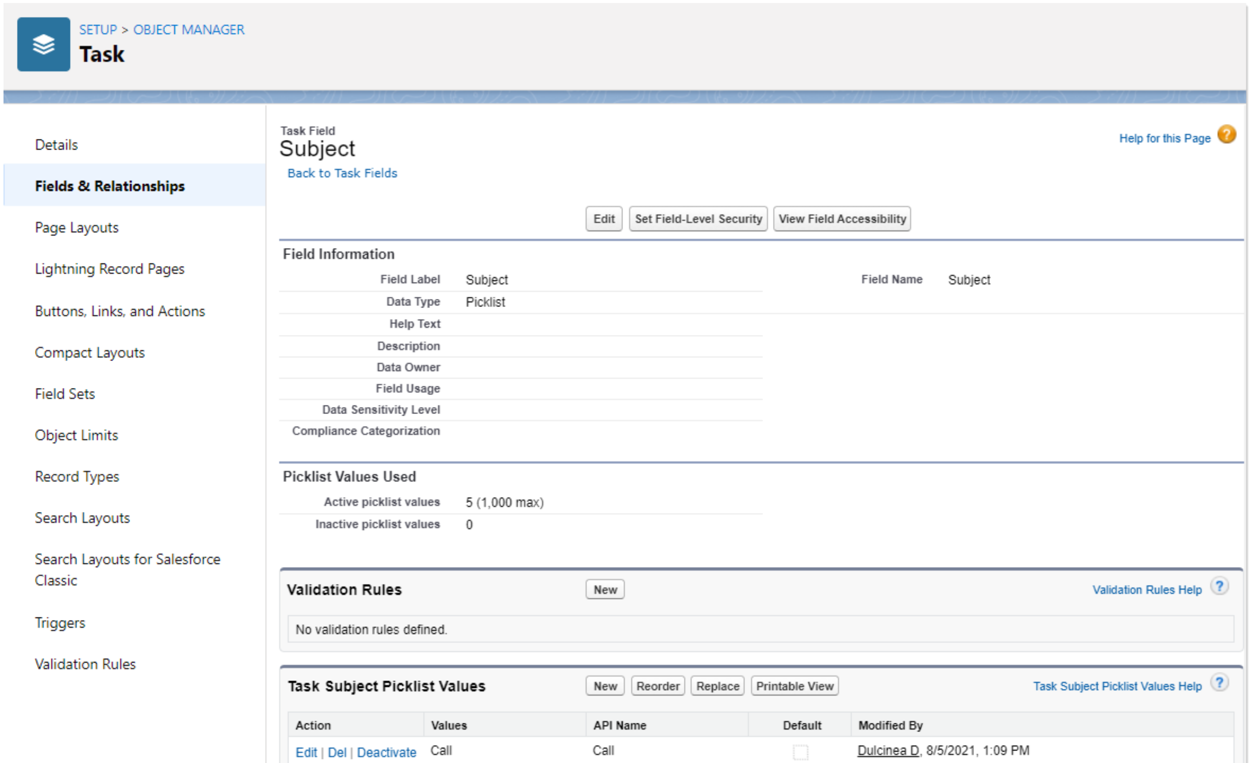
Office@Hand for Salesforce includes the capability to provide a list of preset call dispositions to your end users to make logging calls quick and easy. These dispositions appear in a dropdown list under the **Subject** area of the call log.

These preset dispositions are gathered from the **Subject** picklist on the Salesforce.com **Task** object. To edit these dispositions, navigate to **Setup > Object Manager**, click **Task** under the **Label** column, and then click **Fields & Relationships > Subject**.



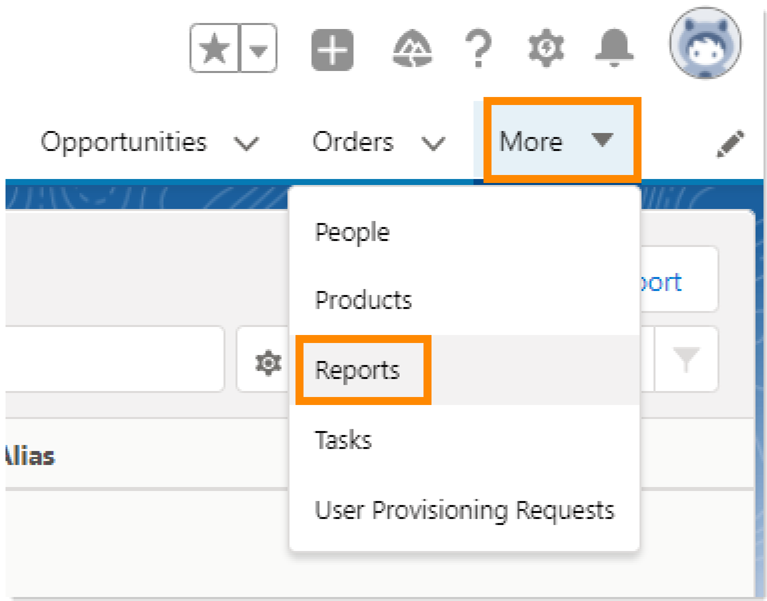

SETUP > OBJECT MANAGER
Task
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Search Layouts
Search Layouts for Salesforce Classic
Triggers
Validation Rules
Fields & Relationships
22 Items, Sorted by Field Label
Recurrence Interval
RecurrenceInterval
Number(9, 0)
Related To
WhatId
Lookup(Contract,Order,Campaign,Account,Oppo Order,Work Order Line Item,Service Appointment,Service Resource,Assigned Resource,Resource Absence,Entitlement,Service Contract,Contract Line Item,Location,Coaching,Goal,Metric,Asset Relationship,List Email,Return Order,Return Order Line Item,Contact Request,Image,Credit Memo,Communication Subscription Consent,Legal Entity,Party Consent,Queued Party,Process Exception)
Reminder Set
IsReminderSet
Checkbox
Repeat This Task
RecurrenceRegeneratedType
Picklist
Status
Status
Picklist
Subject
Subject
Picklist
Task Subtype
TaskSubtype
Picklist
Type
Type
Picklist

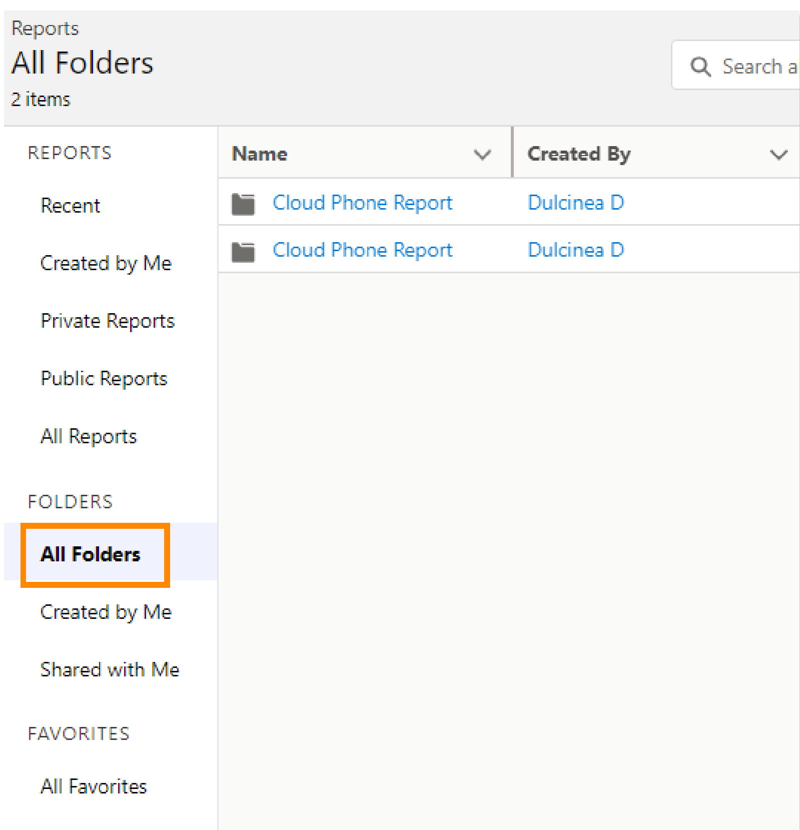
Adding new or editing picklist values here will instantly modify the dispositions available to users.



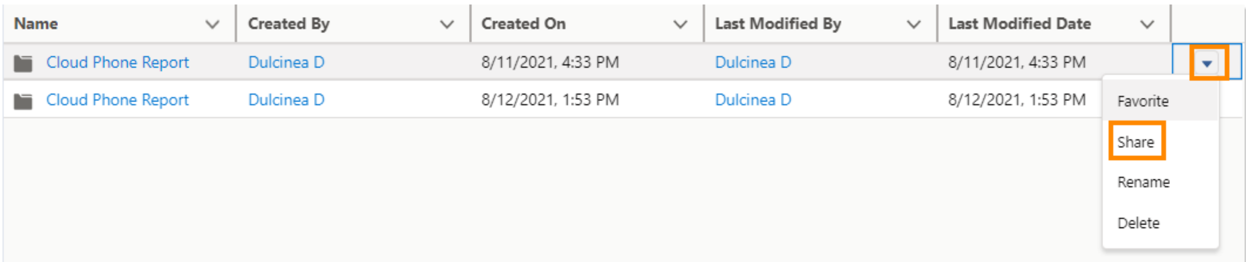
Sharing Report folder with users

From the Office@Hand for Salesforce Lightning app, click **More** at the top right, then click the *Reports* tab in Salesforce. Find the **Cloud Phone Report** folder by clicking on **All Folders** on the left menu.

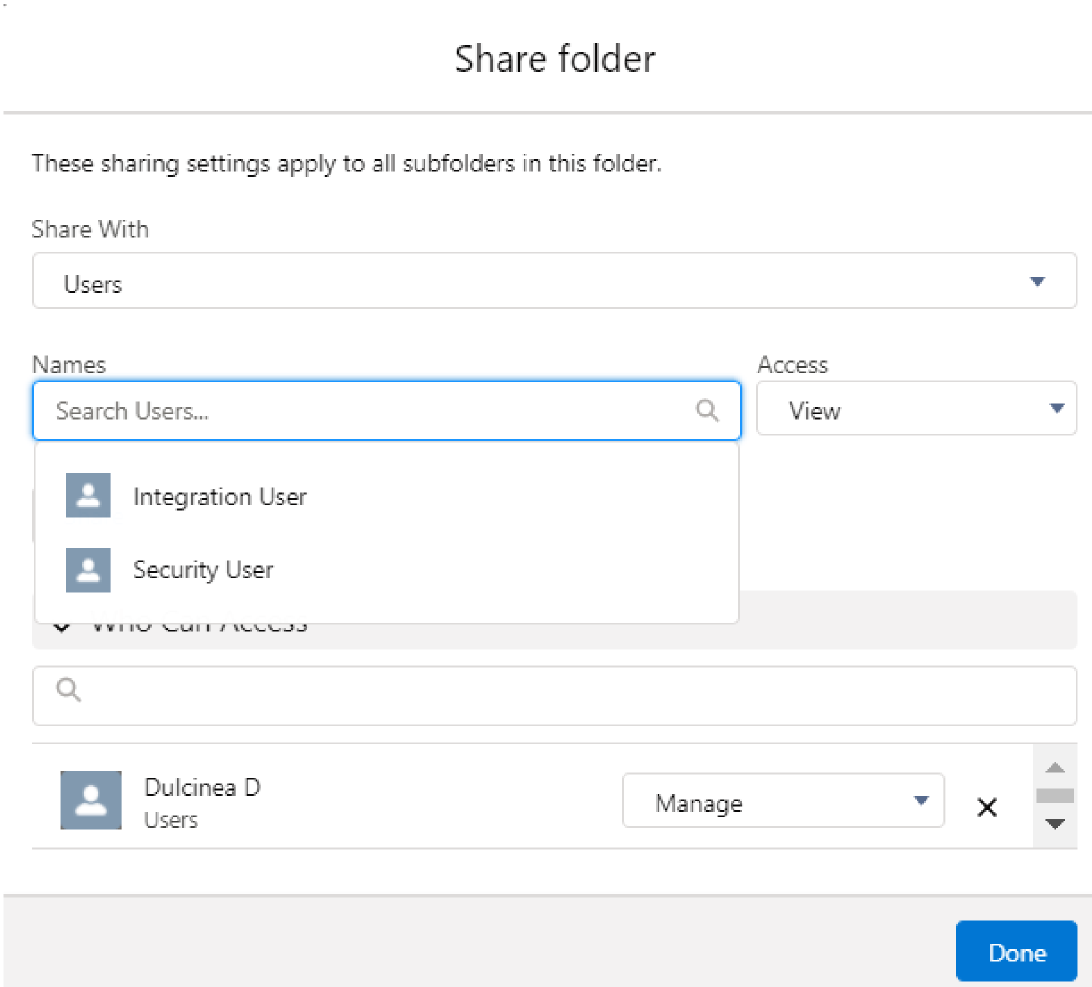




Click on the dropdown arrow at the far right of the **Cloud Phone Report** and click *Share.*

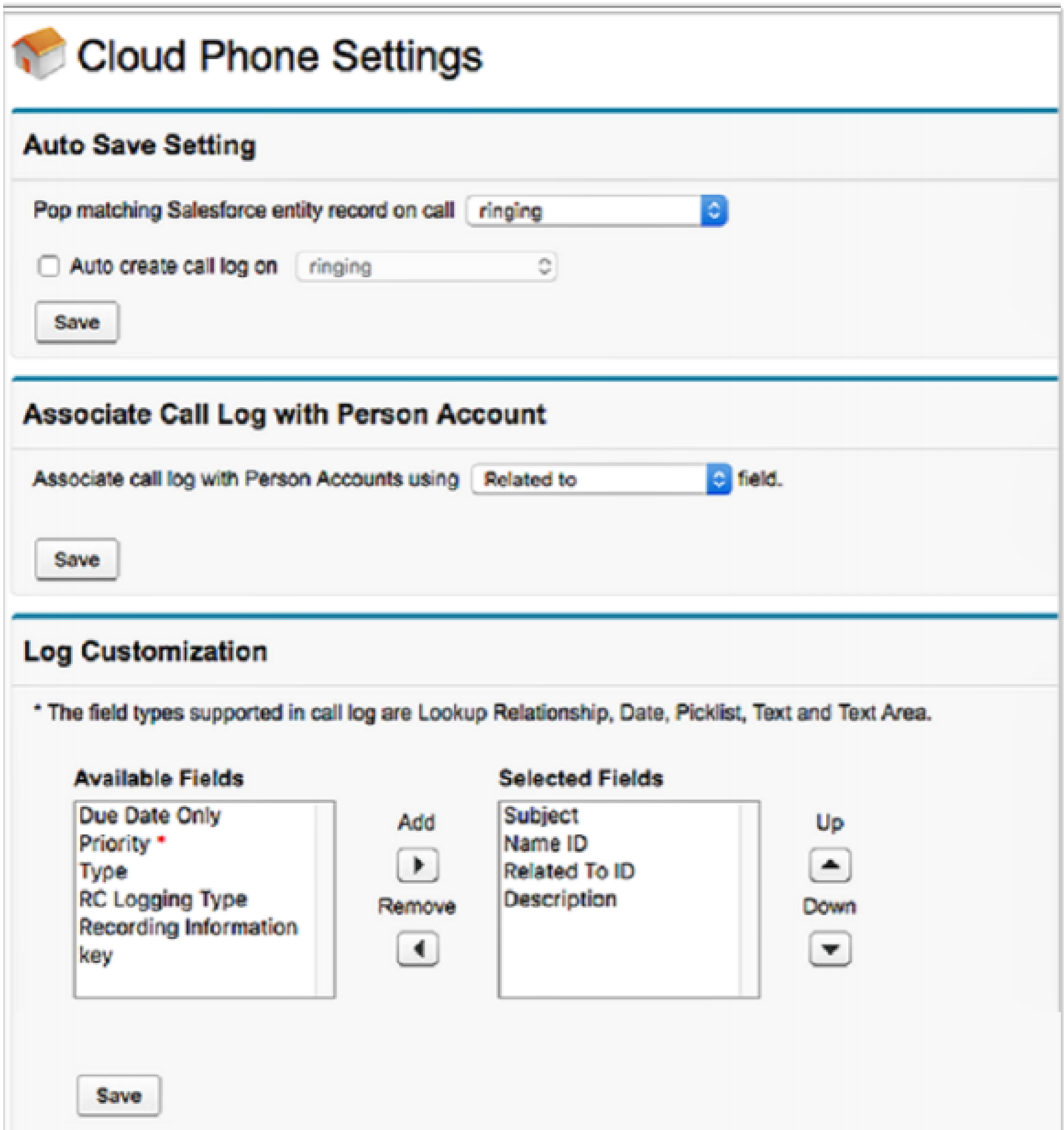


In the **Share folder** window, select the Users or Roles you want to share the reports with, then click **Share** and **Done**.



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.

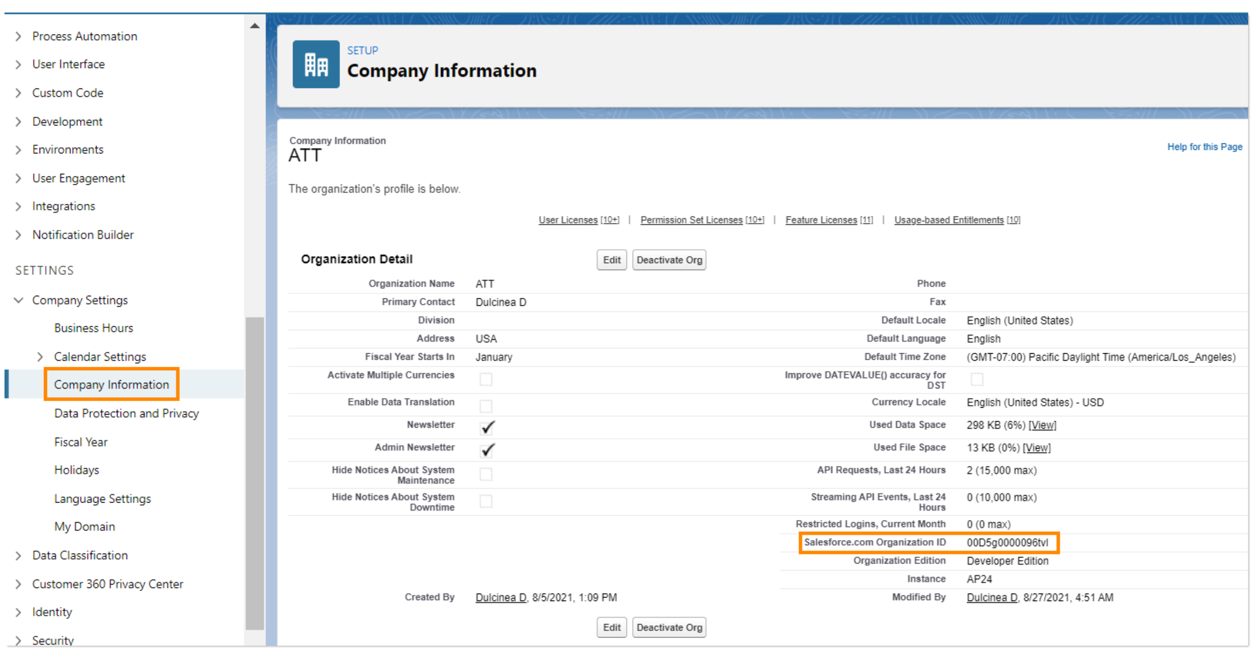


On the **Cloud Phone Settings** page, you can access the following:

- **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.
- **Associate Call Log with Person Account**: Hidden by default. If you want to show it, you must be partners of Salesforce and just open a case asking Salesforce Support to enable person account by providing an Organization ID. Navigate to **Settings > Company Information** and use the **Salesforce.com Organization ID** field.

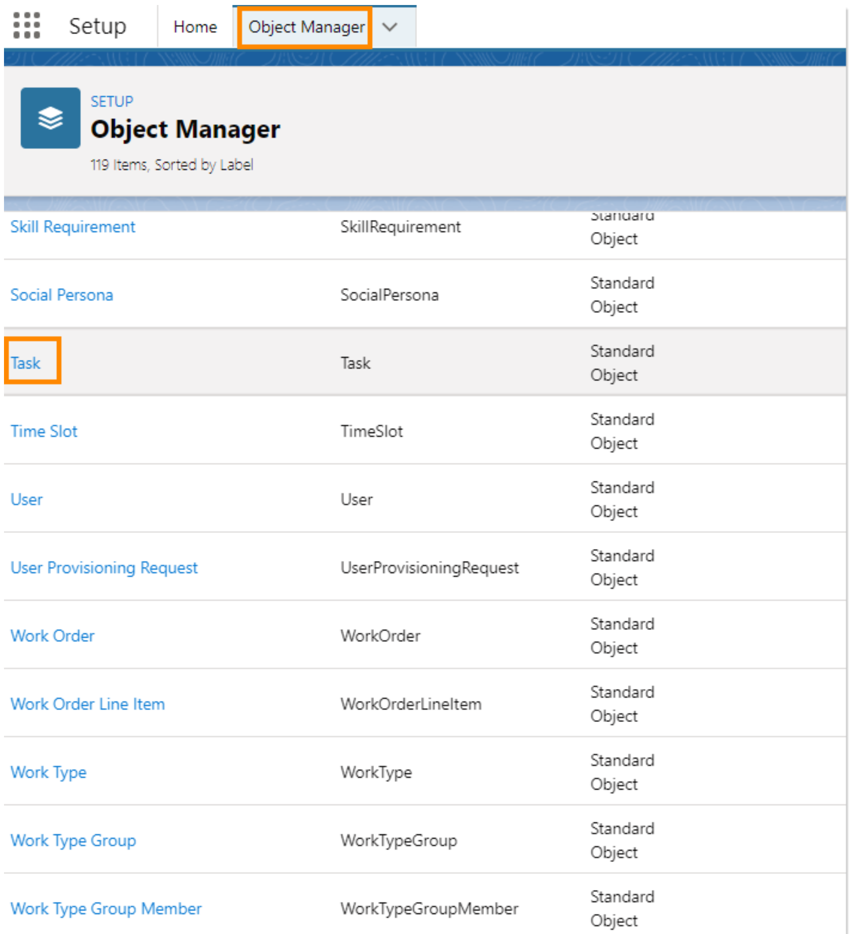
- **Log Customization**: Add/remove call log fields using the left/right arrows and order the selected call log fields using the up/down arrows. Click **Save** when call log settings are as expected and refresh the page. The call log UI of the Office@Hand for Salesforce app should render these fields 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**. The incoming call pop-up on the new browser tab is not working in Lightning mode, but it works well in Classic mode.

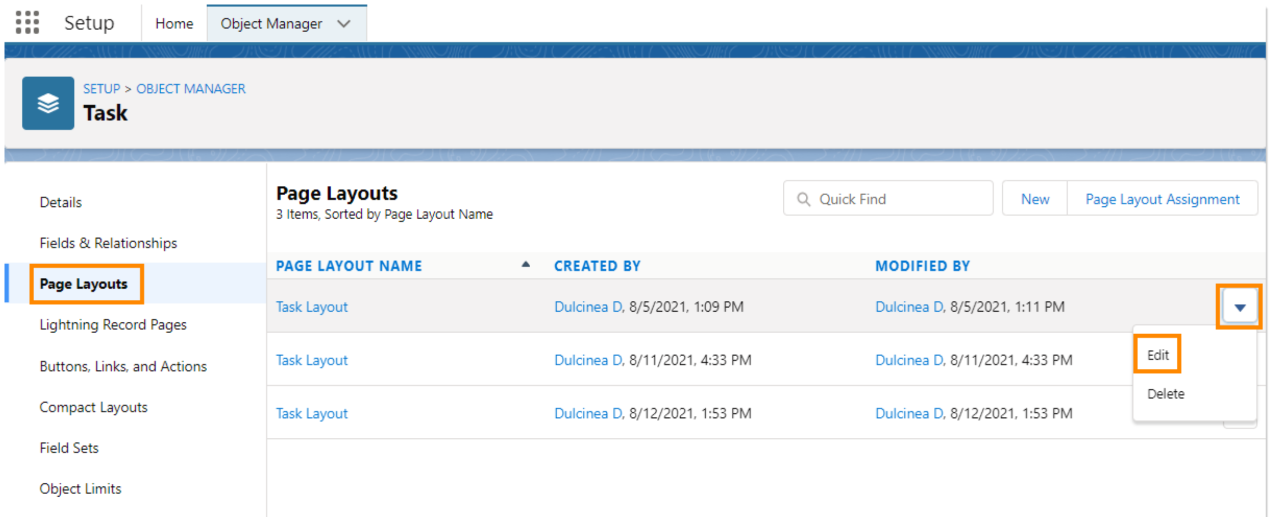


Call Recording

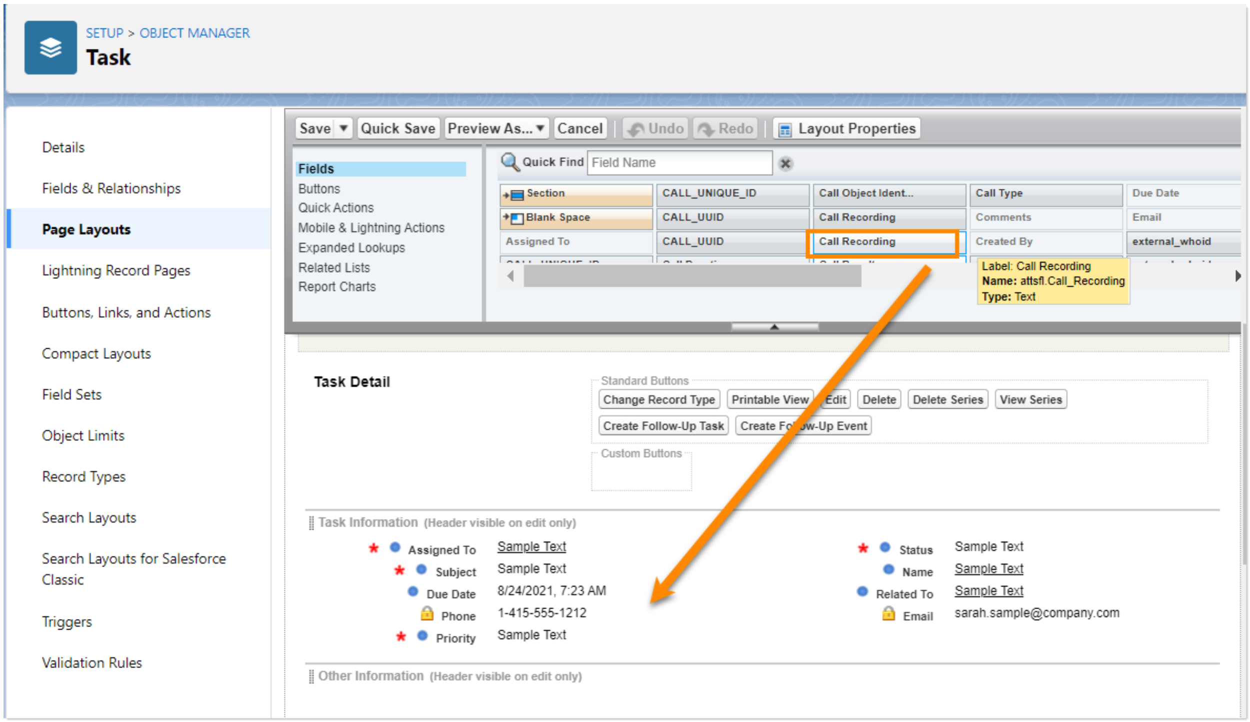
To allow users in your organization to access their Office@Hand call recordings from within Salesforce, navigate to **Object Manager** > **Task** > **Page Layouts**.



Click the dropdown arrow at the far right of the page layout you want to configure, then click *Edit*.



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

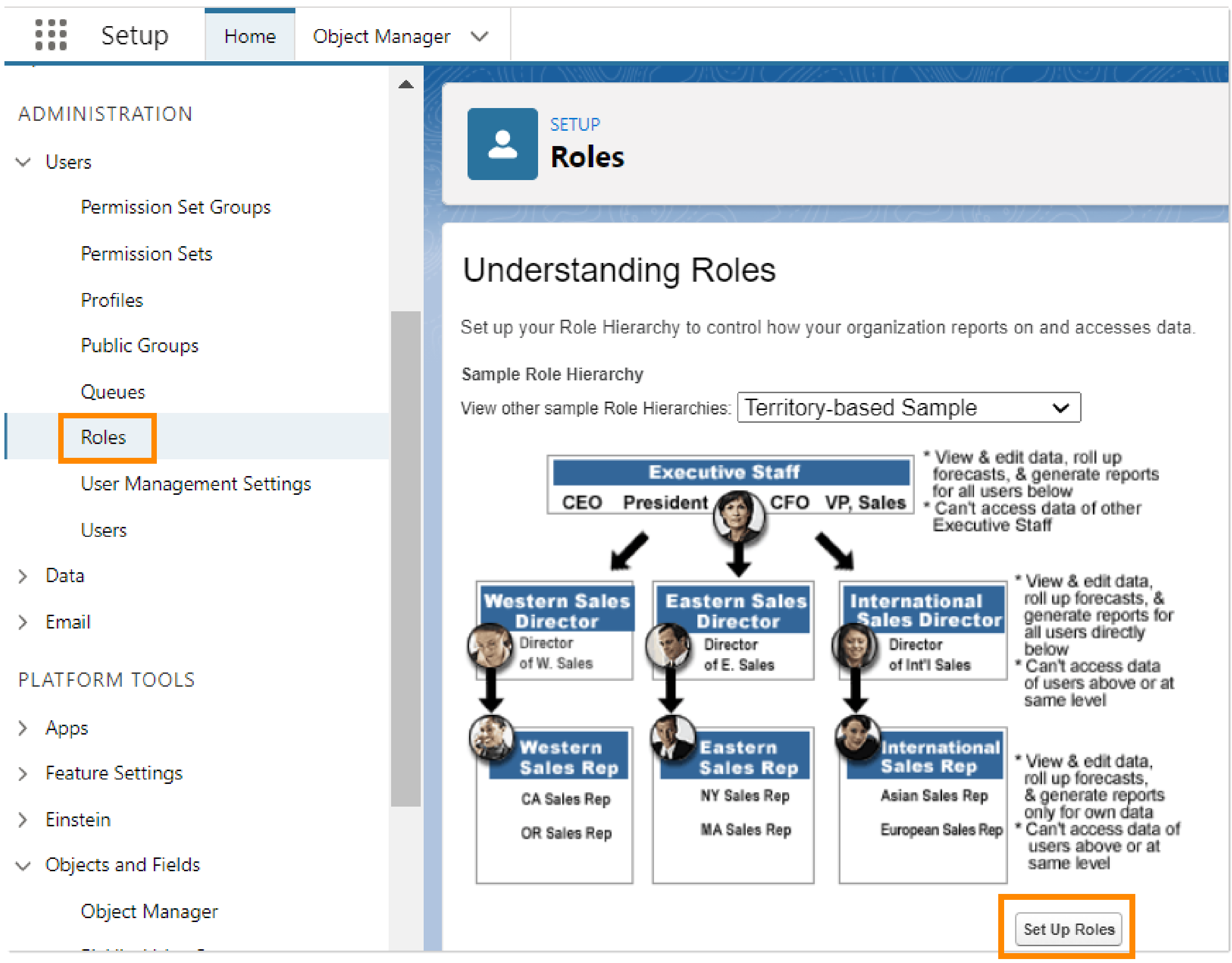


Analytics Report

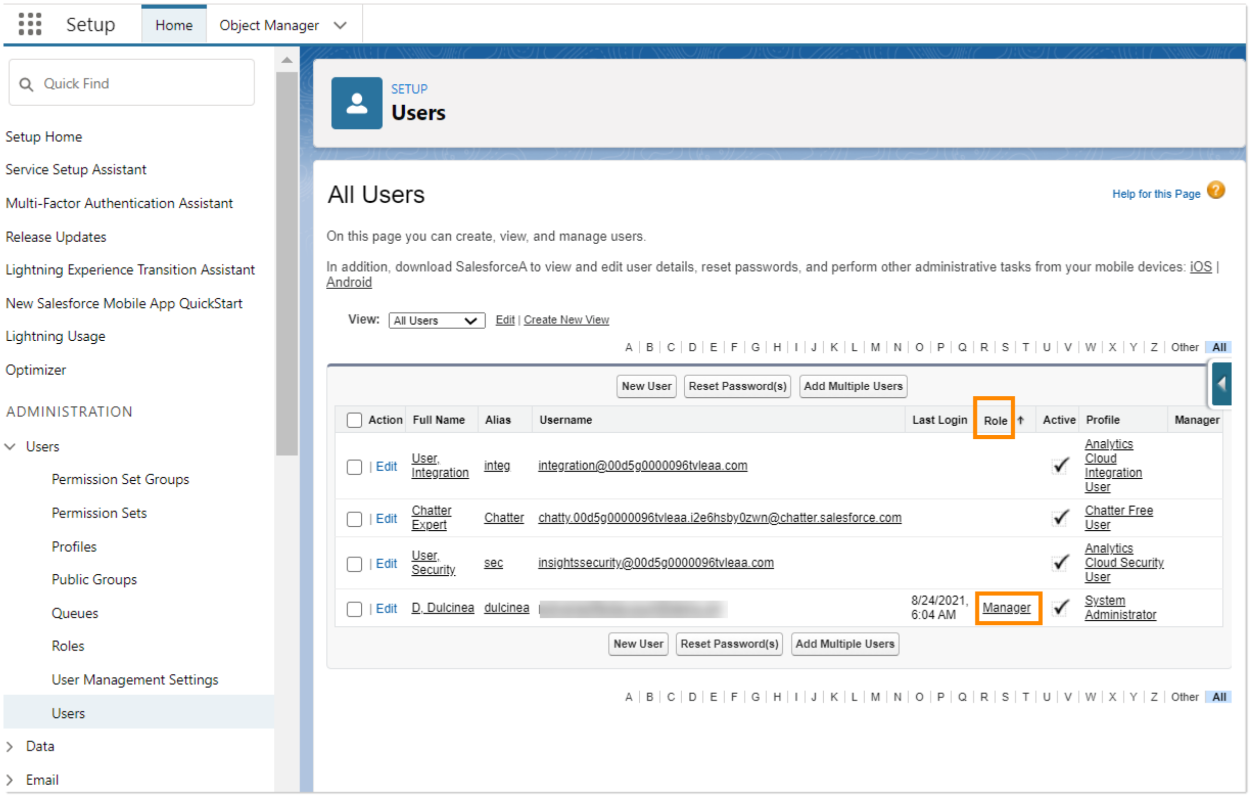
Analytics Report is a key feature that gives your sales leaders complete visibility on their team's performance from a call data perspective. It also gives sales reps insights into their call data.

Prerequisites: Define hierarchy and assign roles to users in Salesforce

In order to create a team view and individual representative view, navigate to **Setup Home > Administration > Users > Roles**, then click **Set Up Roles**.

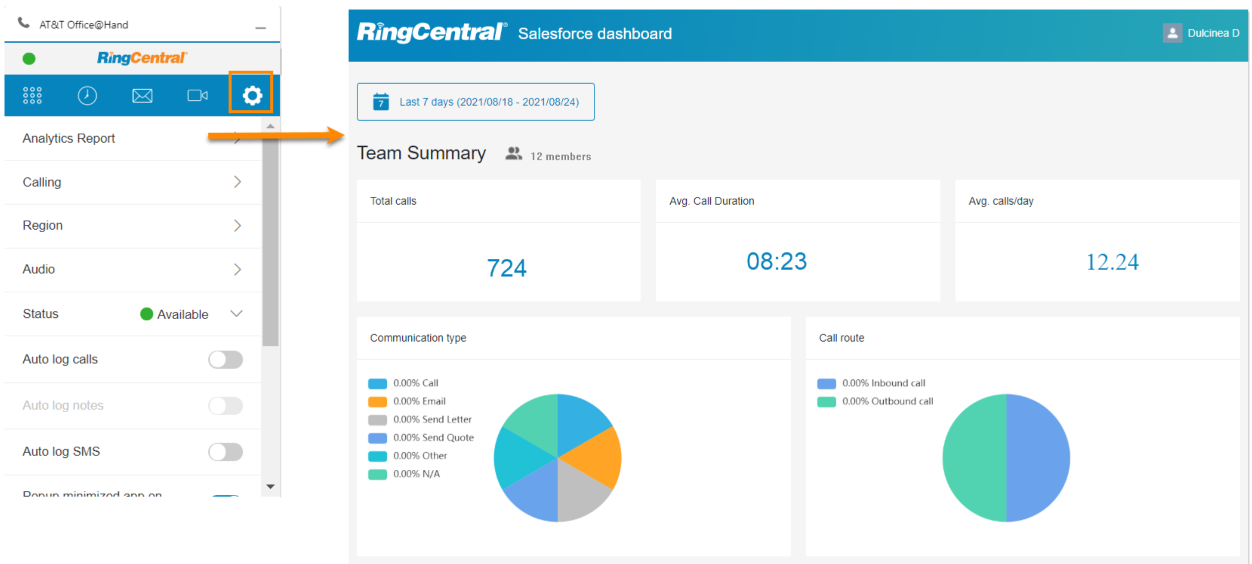


You can define team hierarchy here and assign roles to users.



Entry for Analytics Report

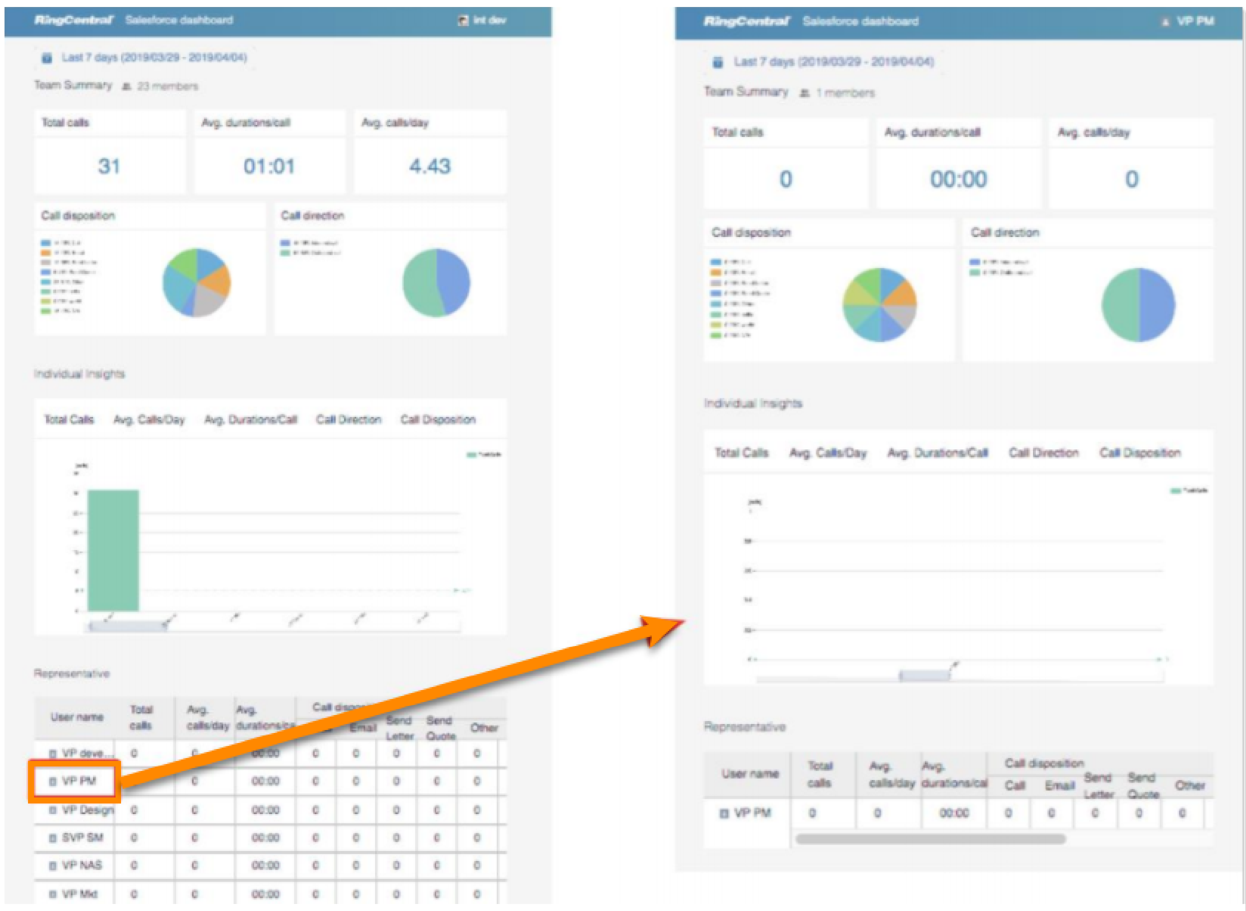
Analytics Report is available under the **Settings** menu. If you have not set up the role hierarchy, it only shows your individual data for the signed-in account. If role hierarchy is enabled, it shows the data for all the team members.



Team view vs. Individual view

You can see all the members under your role based on the Salesforce roles hierarchy. When you click on a sales representative's name 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 the **Team view** page and the **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 Report (beta)

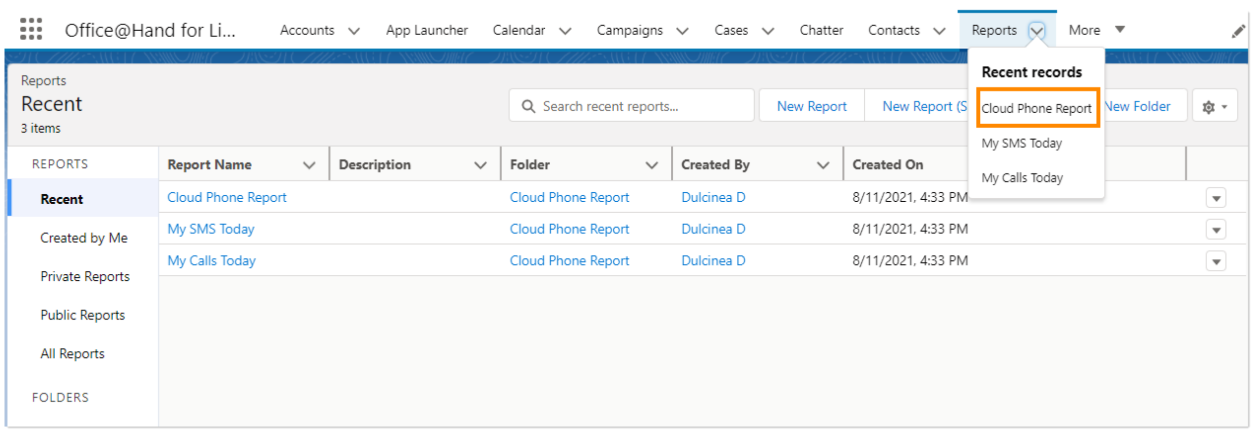
With Cloud Phone Reports, Team Leads and Sales Managers will be able to leverage Office@Hand Analytics data such as overall team performance and view it as a native Salesforce report. These reports provide you with the flexibility to edit and customize the report within the Salesforce interface, which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

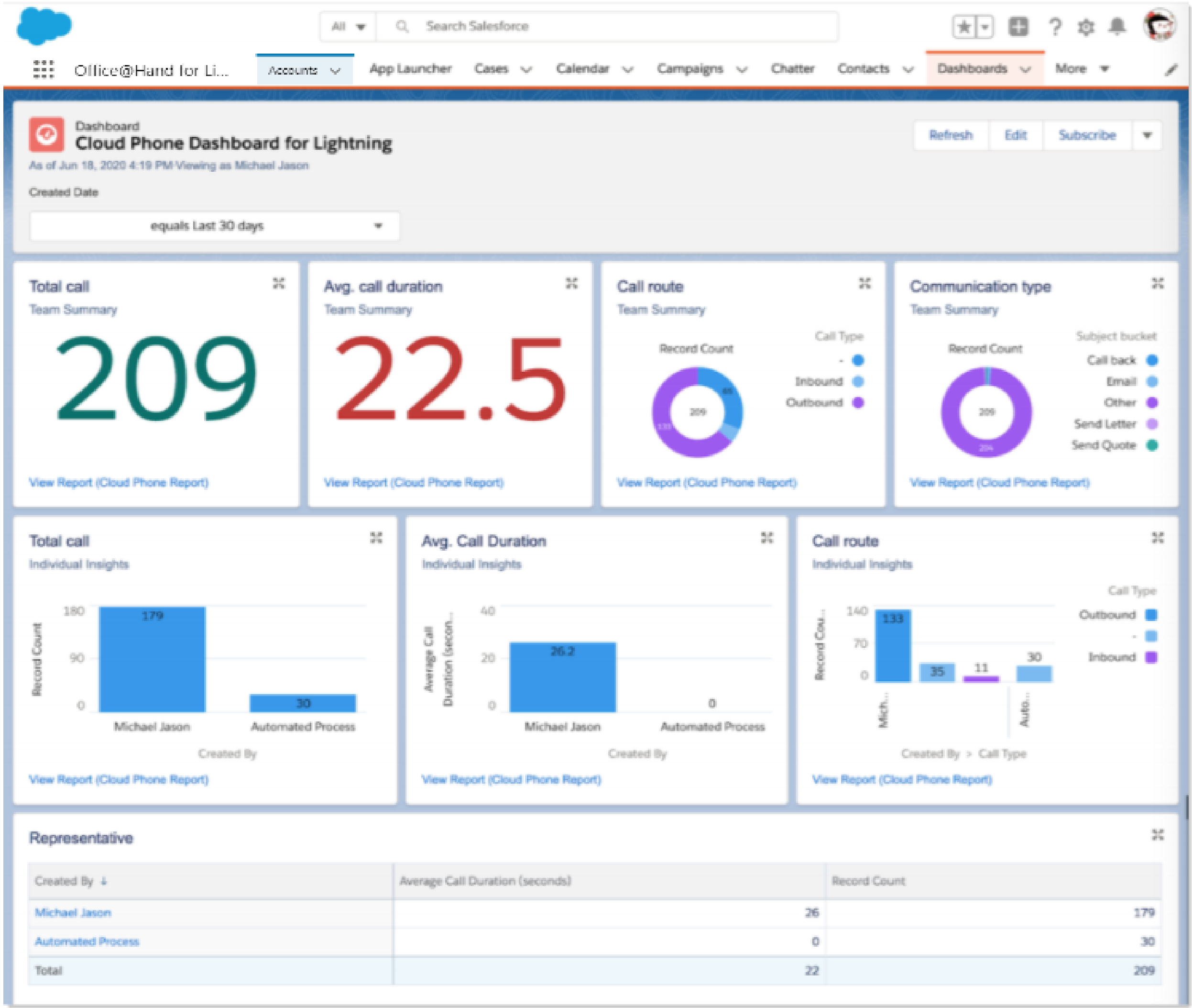
Prerequisite: Users who have Reports/Dashboard features permission would be able to access and edit the reports and make copies for the future.

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 the report page for a specific user on clicking on the reps name is unavailable.



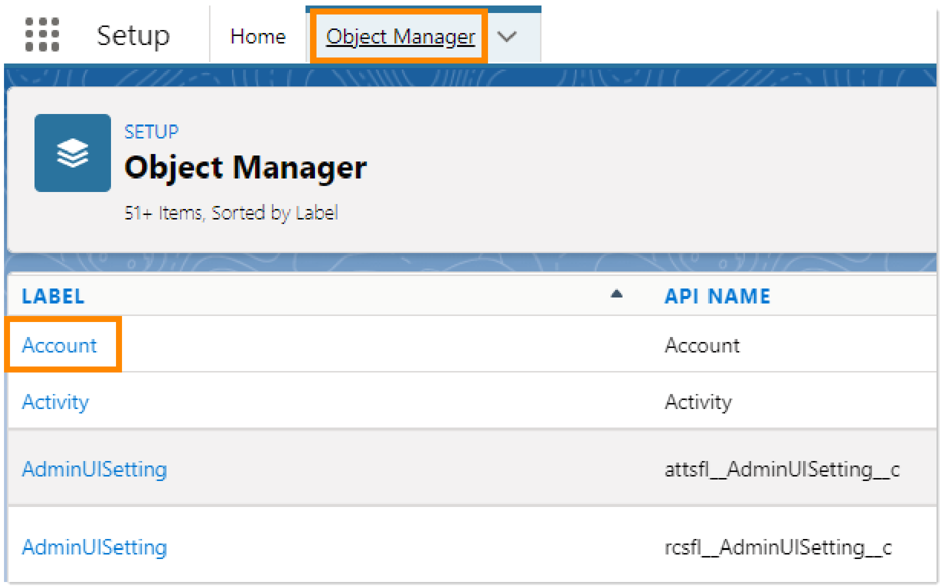

Dashboard
Cloud Phone Dashboard for Lightning
As of Jun 18, 2020 4:19 PM Viewing as Michael Jason
Refresh
Edit
Subscribe
Created Date
equals Last 30 days
Total call
Team Summary
209
View Report (Cloud Phone Report)
Avg. call duration
Team Summary
22.5
View Report (Cloud Phone Report)
Call route
Team Summary
Record Count
Call Type
Inbound
Outbound
View Report (Cloud Phone Report)
Communication type
Team Summary
Record Count
Subject bucket
Call back
Email
Other
Send Letter
Send Quote
View Report (Cloud Phone Report)
Total call
Individual Insights
Record Count
179
30
Michael Jason
Automated Process
Created By
View Report (Cloud Phone Report)
Avg. Call Duration
Individual Insights
26.2
0
Michael Jason
Automated Process
Created By
View Report (Cloud Phone Report)
Call route
Individual Insights
Call Type
Outbound
Inbound
133
35
11
30
Created By > Call Type
View Report (Cloud Phone Report)
Representative
Created By
Average Call Duration (seconds)
Record Count
Michael Jason
26
179
Automated Process
0
30
Total
22
209

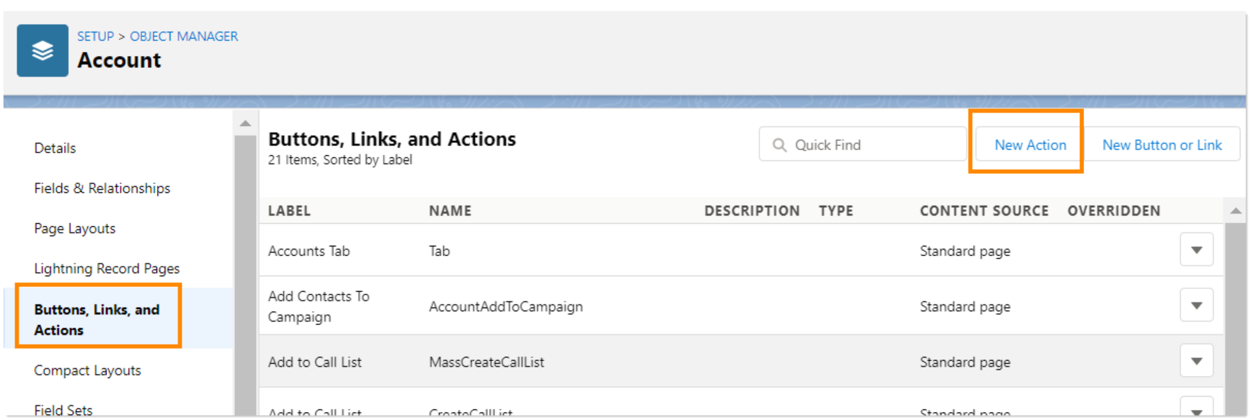
Adding Office@Hand Call and SMS options to Salesforce mobile app

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**.

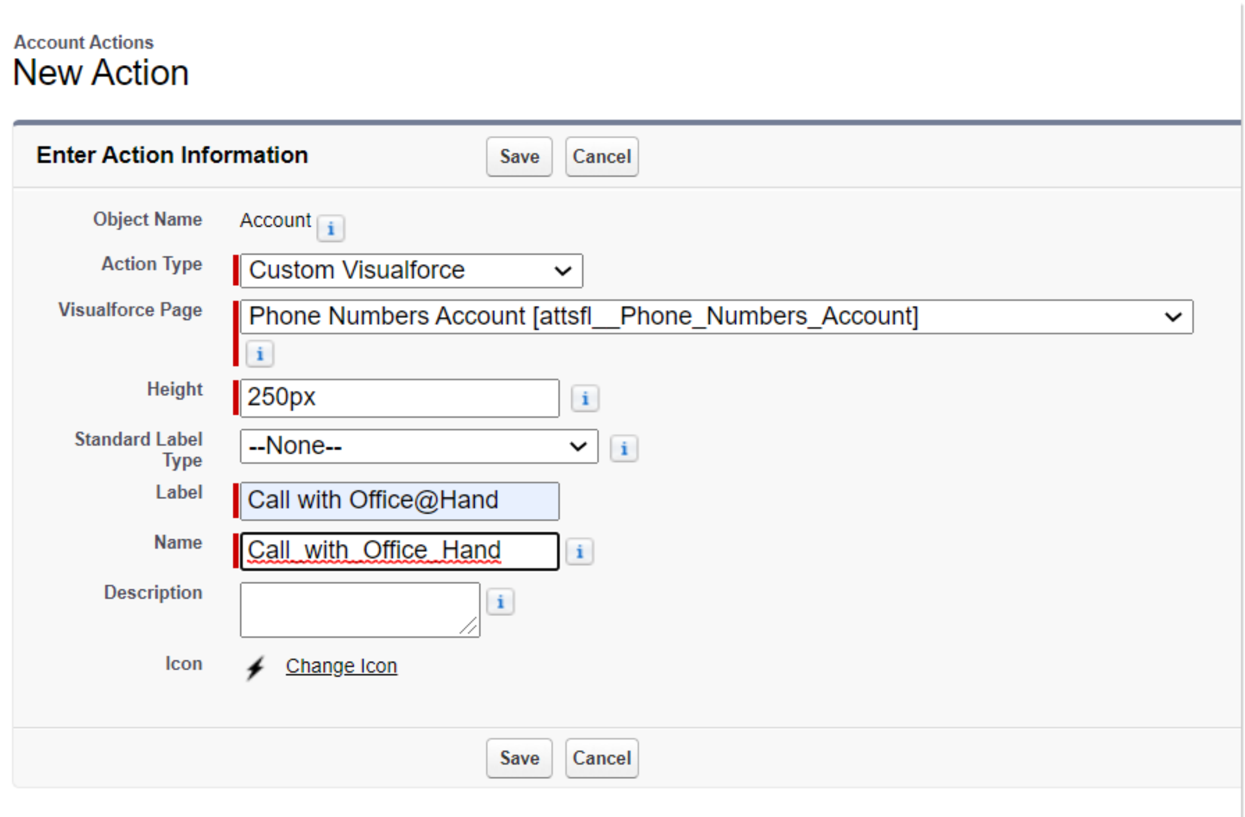
Creating New Actions

Navigate to **Setup Home > Object Manager > Account**, then click on **Buttons, Links, and Actions > New Action**.

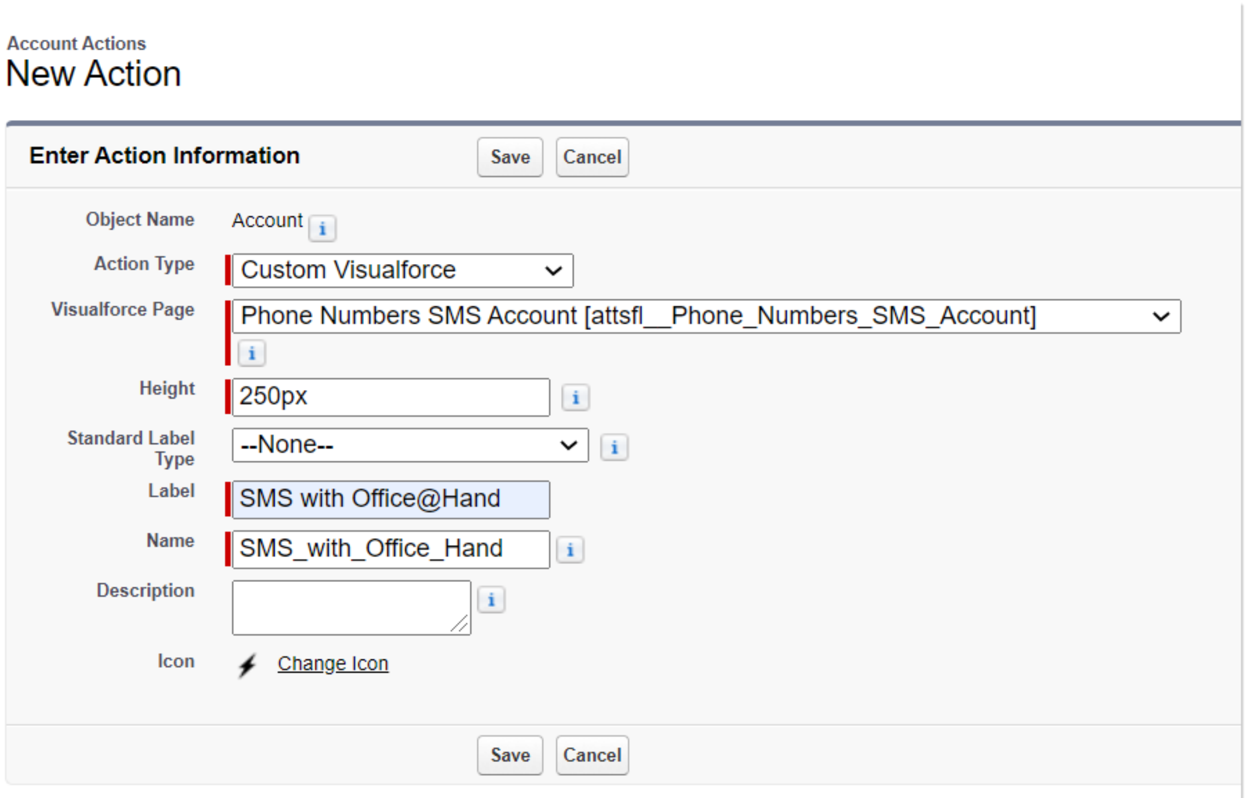




Select *Custom Visualforce* as **Action type** and select *Phone Numbers Account [rcsfl__Phone_Numbers_Account]* in the **Visualforce Page** dropdown list, enter Call with Office@Hand as the **Label**, and click **Save**.

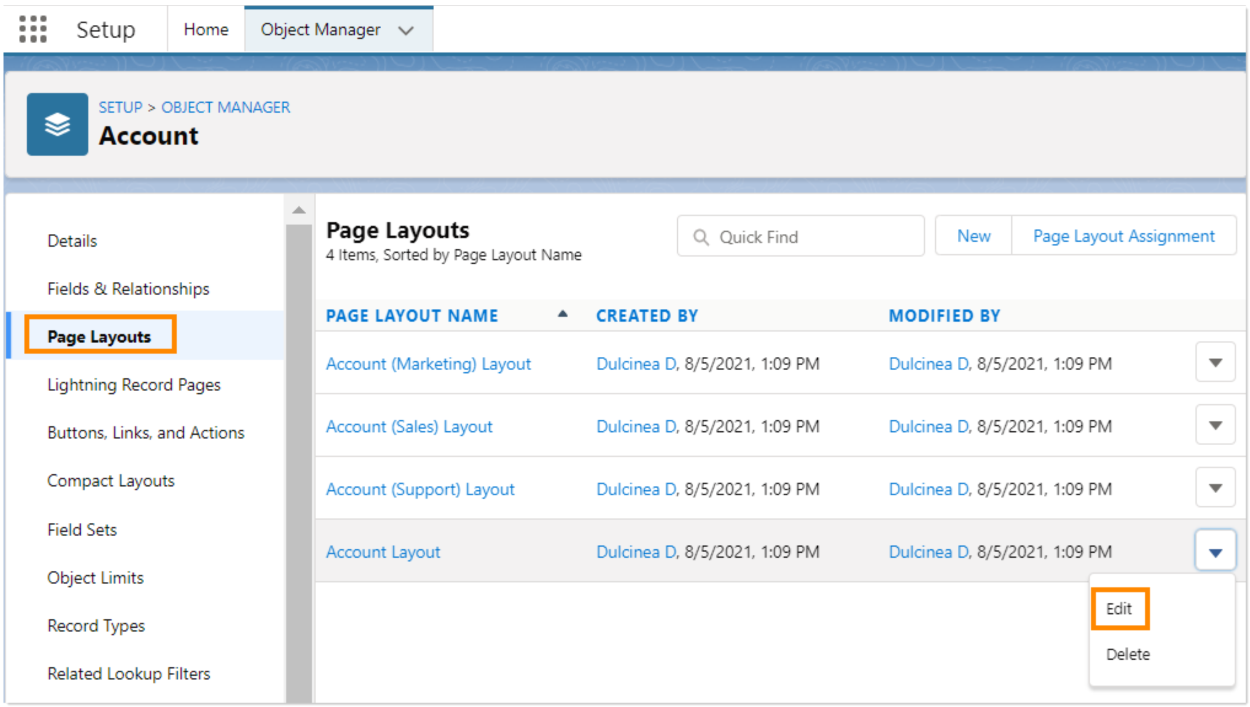


Repeat the above step and select *Phone Numbers SMS Account [rcsfl__Phone_Numbers_SMS_Account]* in the **Visualforce Page** dropdown list, enter SMS with Office@Hand as **Label**, and click **Save**.

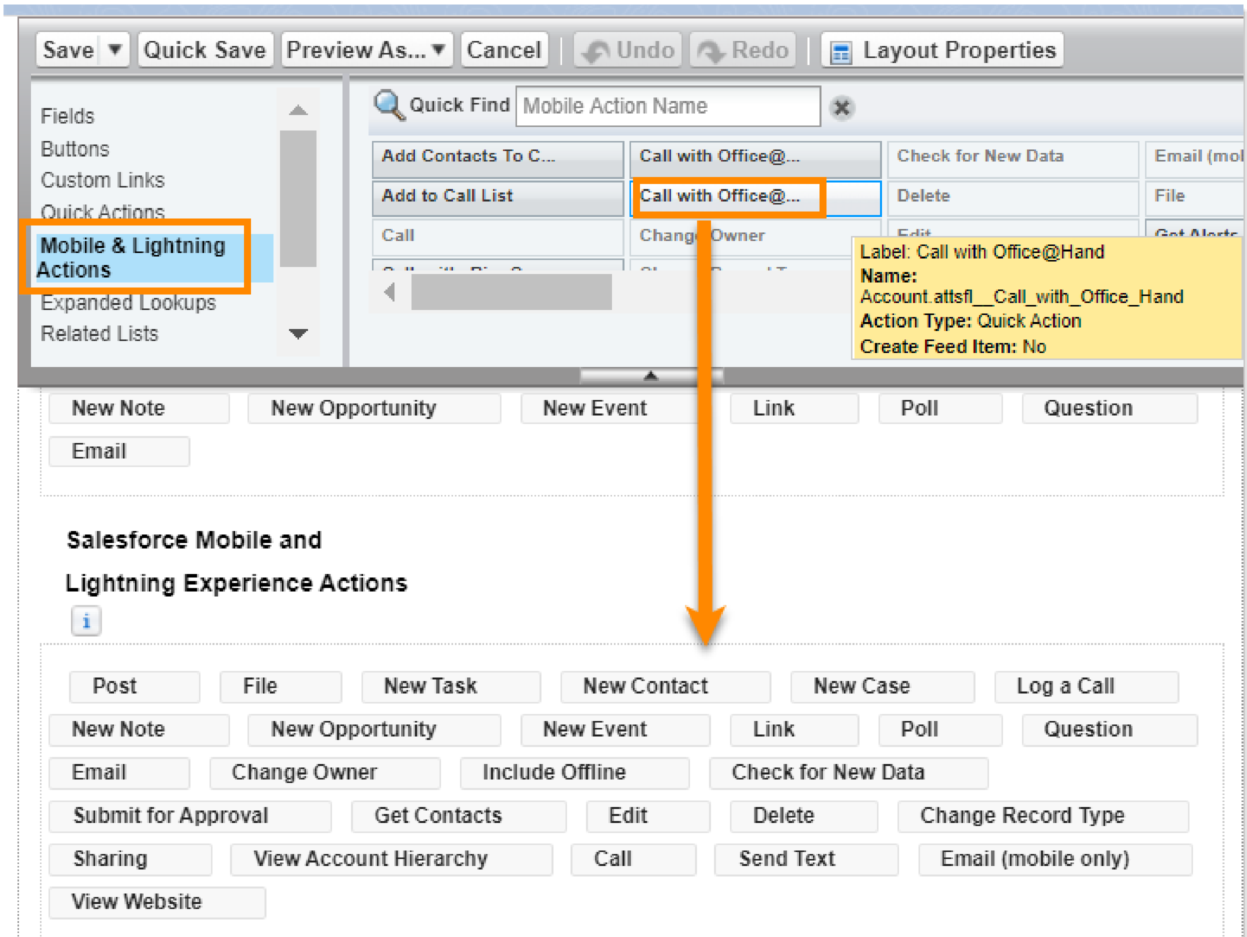


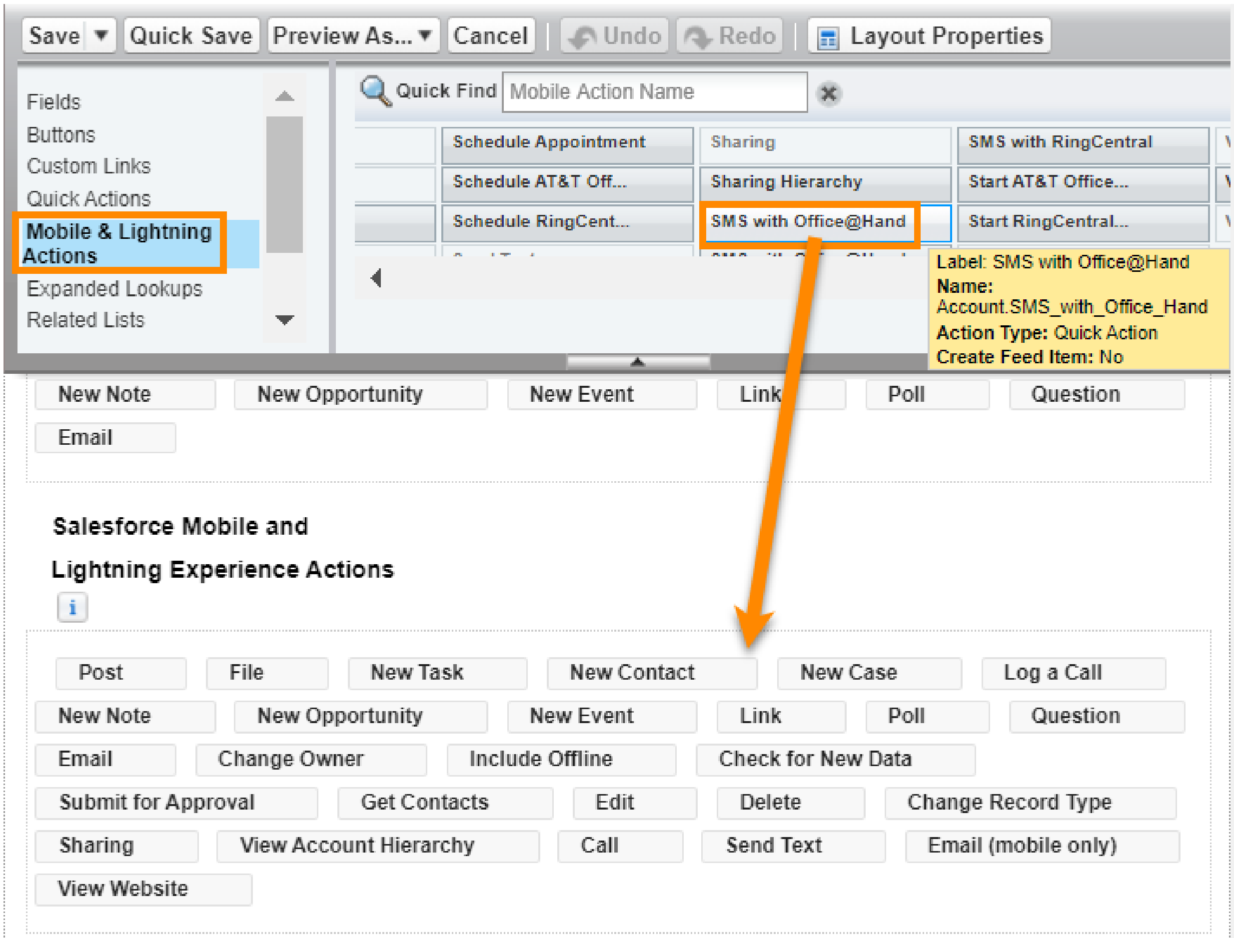
Adding Actions to Salesforce mobile app

Navigate to **Setup Home > Object Manager > Account**, then click **> Page Layouts**. Click *Edit* at the far right of the **Page Layout** you want to change.

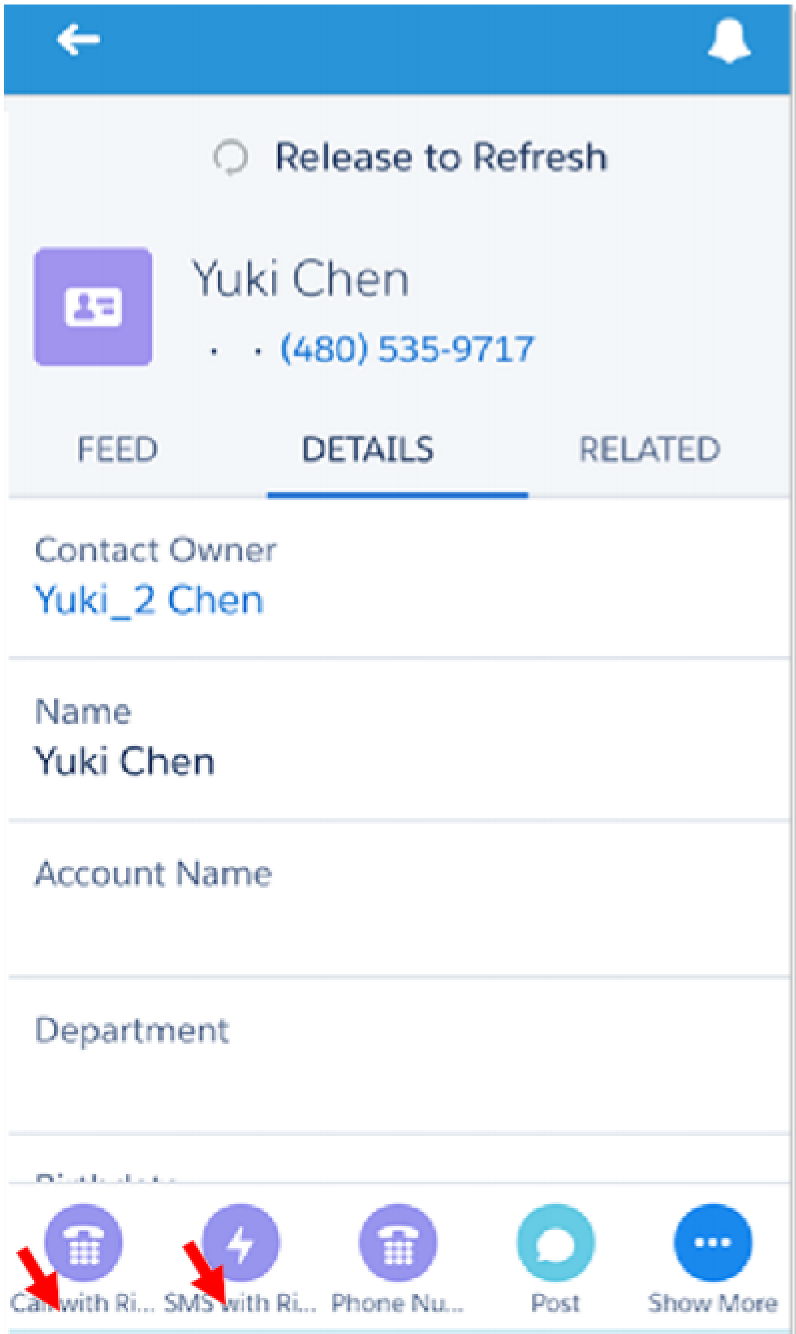


From the **Mobile & Lightning Actions** list, drag the actions **Call with Office@Hand** and **SMS with Office@Hand** to the **Salesforce Mobile and Lightning Experience Actions** section. Click **Save**.




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

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.



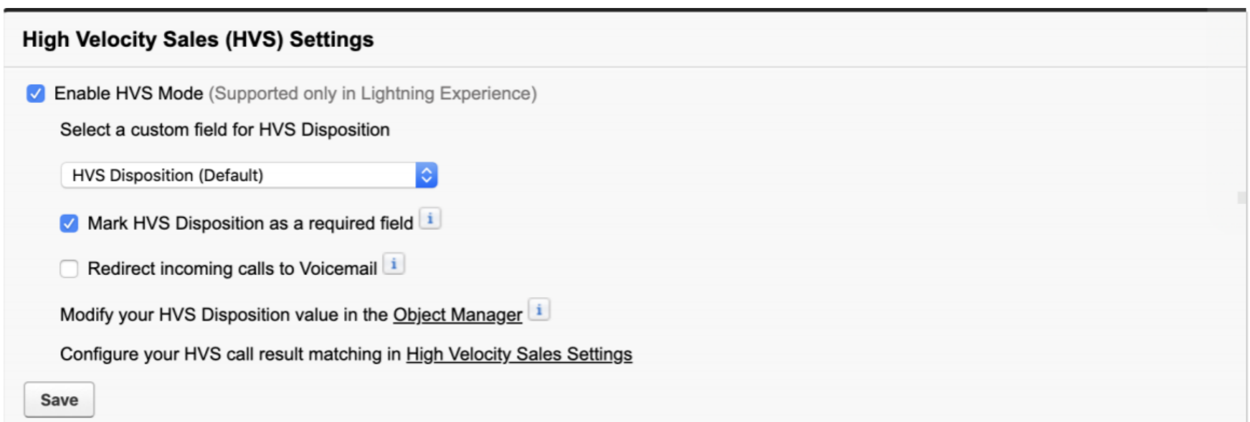
High Velocity Sales (HVS) settings (beta)

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**.

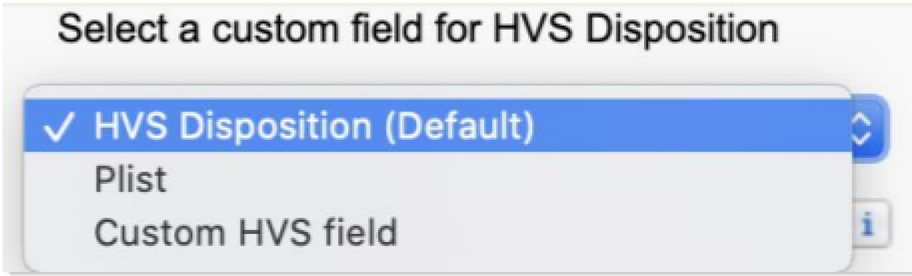


Enabling HVS Mode

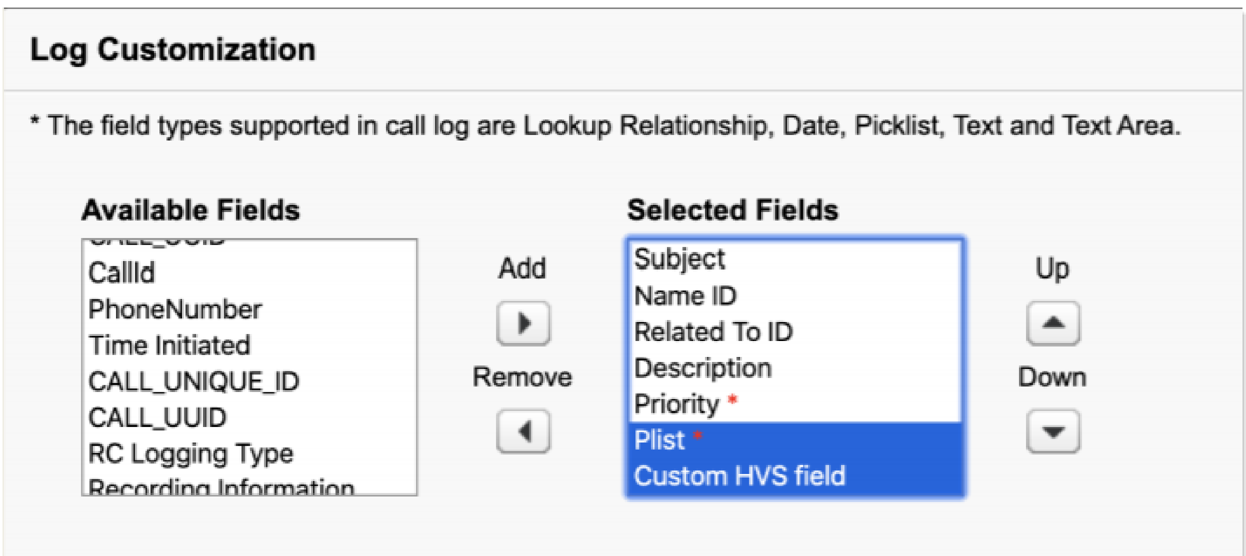
Select the checkbox to enable **HVS Mode** in the Office@Hand for Salesforce Lightning widget, then click **Save**. When checked, HVS settings for Office@Hand for Salesforce Lightning app will be applied to all users in the organization who are assigned both the HVS app and Office@Hand for Salesforce 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 of 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 the **Available Fields** section to the **Selected Fields** section. For HVS related calls, 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.



Marking HVS Disposition as a required field

Organizations can choose to make the HVS Disposition a required field where end users must 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.

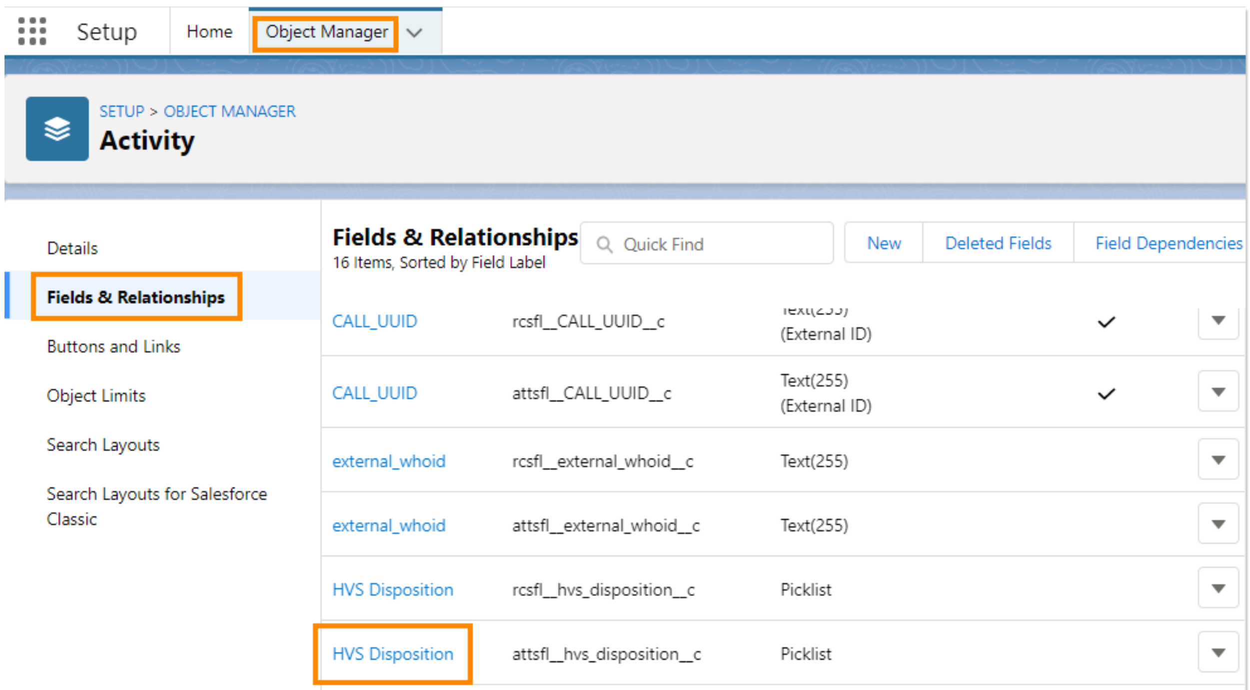
Redirecting incoming calls to voicemail

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

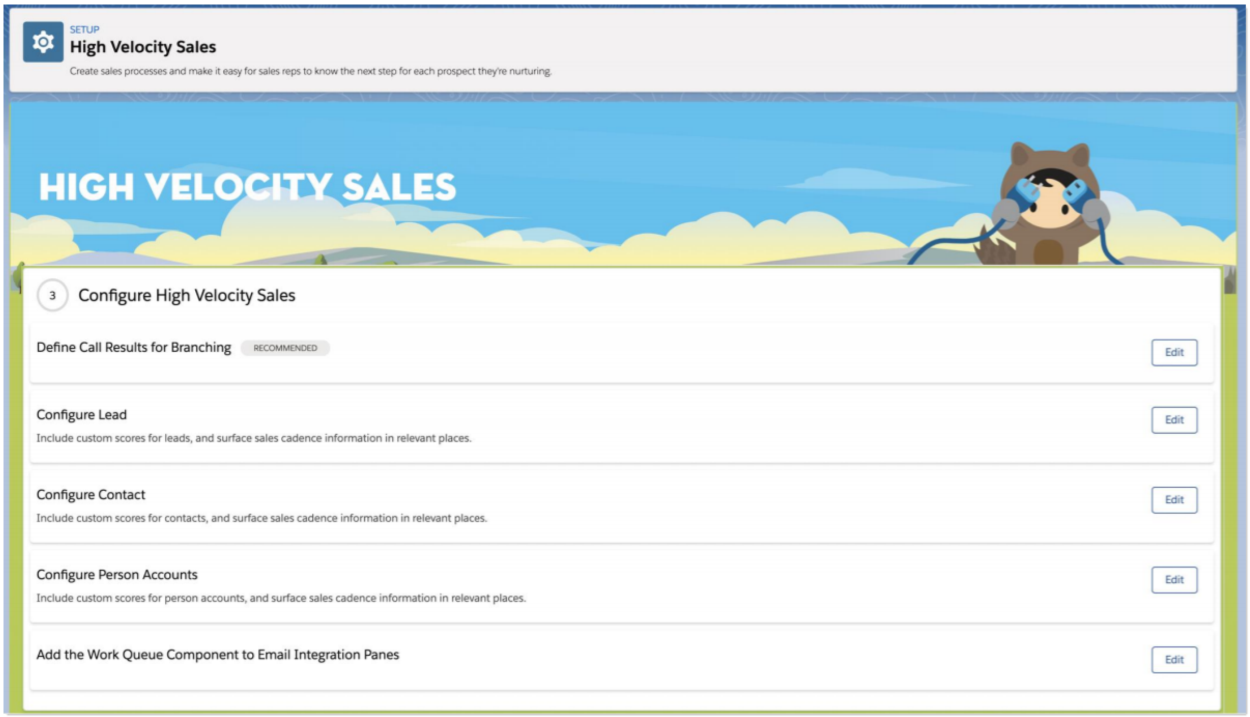
The dropdown list of values that can be selected for the HVS Disposition field can be customized through the Object Manager. Click on **Object Manager** to open a new tab to the **Salesforce Setup** page displaying Object Manager settings.

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**.



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 the Salesforce Setup interface.



Enabling Do Not Contact

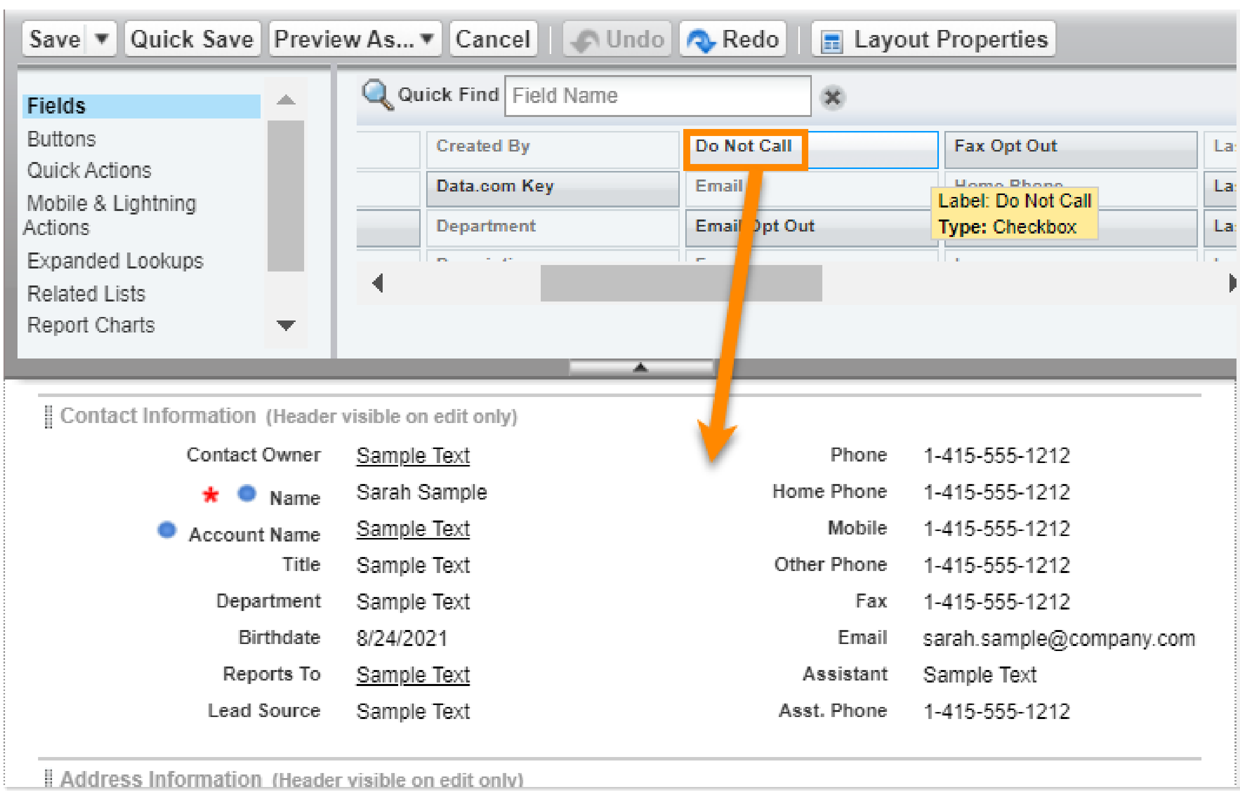
Contact and Lead type objects in Salesforce have a default field **Do Not Call** available in the Contact or Lead layout, which admins use as a flag to remind end users not to contact this record.

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

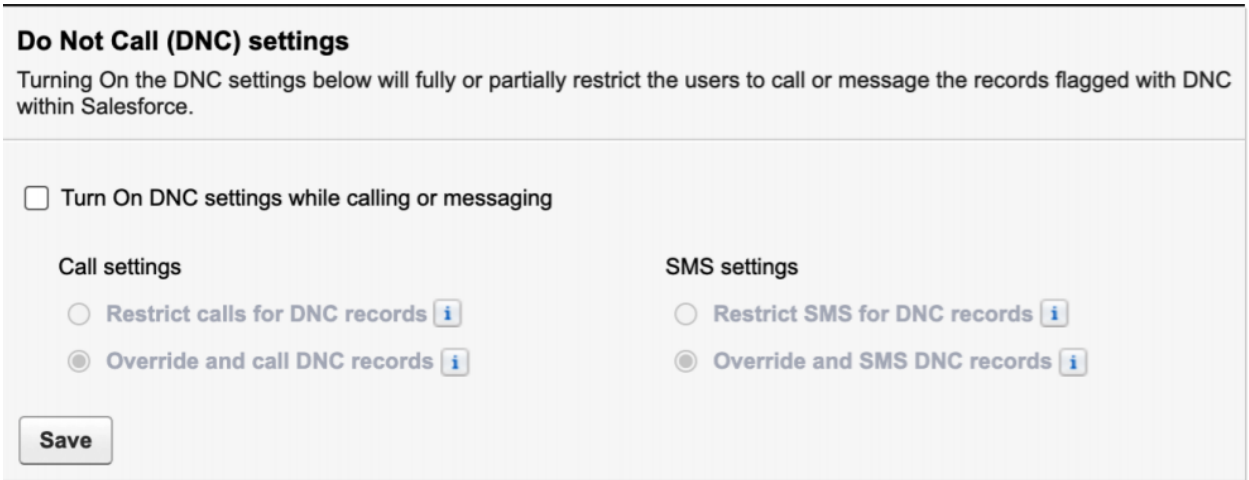
If a Lead or a Contact is flagged with the DNC field, the Salesforce admins can enable the Office@Hand for Salesforce to restrict the end users in the organization from calling or sending text messages to those leads or contacts.

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

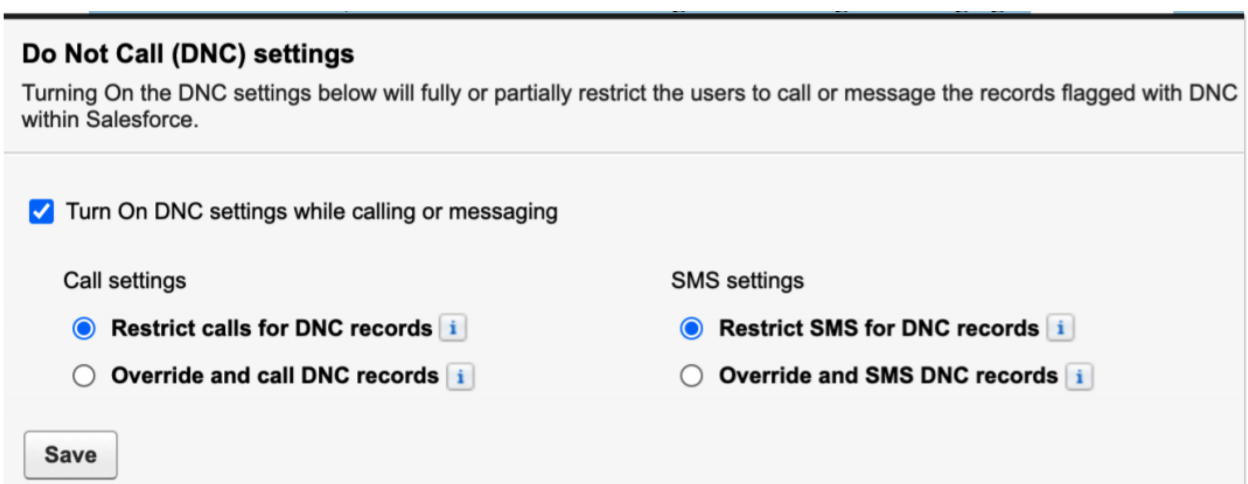
1. Upgrade the Office@Hand for Salesforce to the latest version (v6.11.0 or later).
2. Make sure the **DNC** field is available to be set in the Salesforce Org. This can be done by enabling the DNC field in the page layout in Contact and Leads.



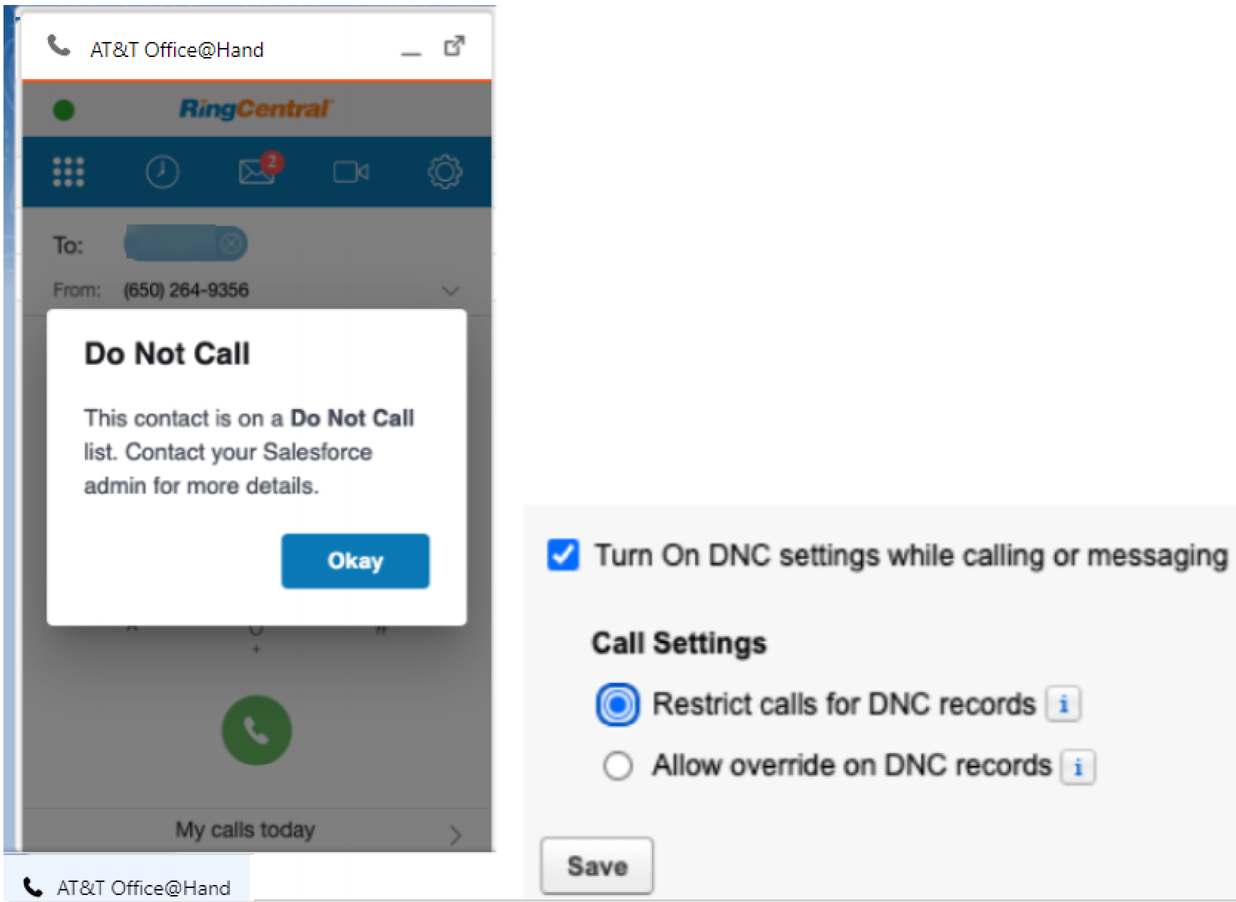
3. Open the **AdminUI** for Office@Hand for Salesforce. There shall be a Do Not Call (DNC) Settings session. This feature is turned off by default.



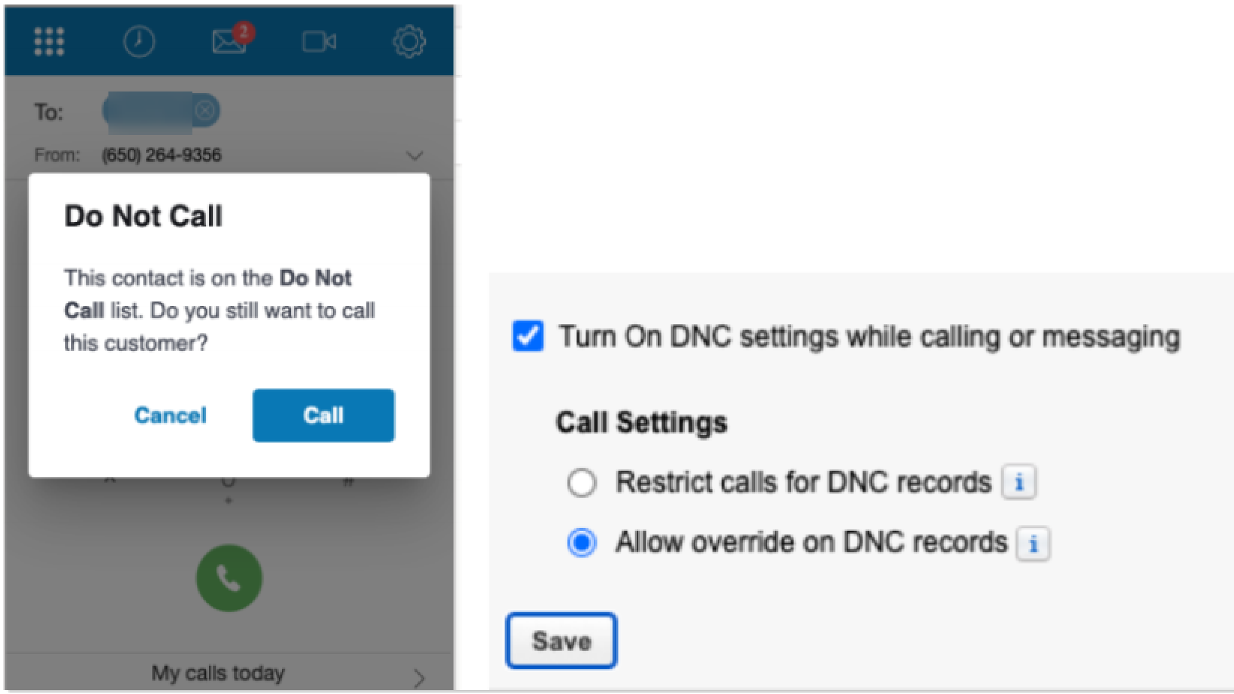
4. To turn on the feature, check **Turn On DNC settings while calling or messaging**, then select the **Call settings** and **SMS settings**.



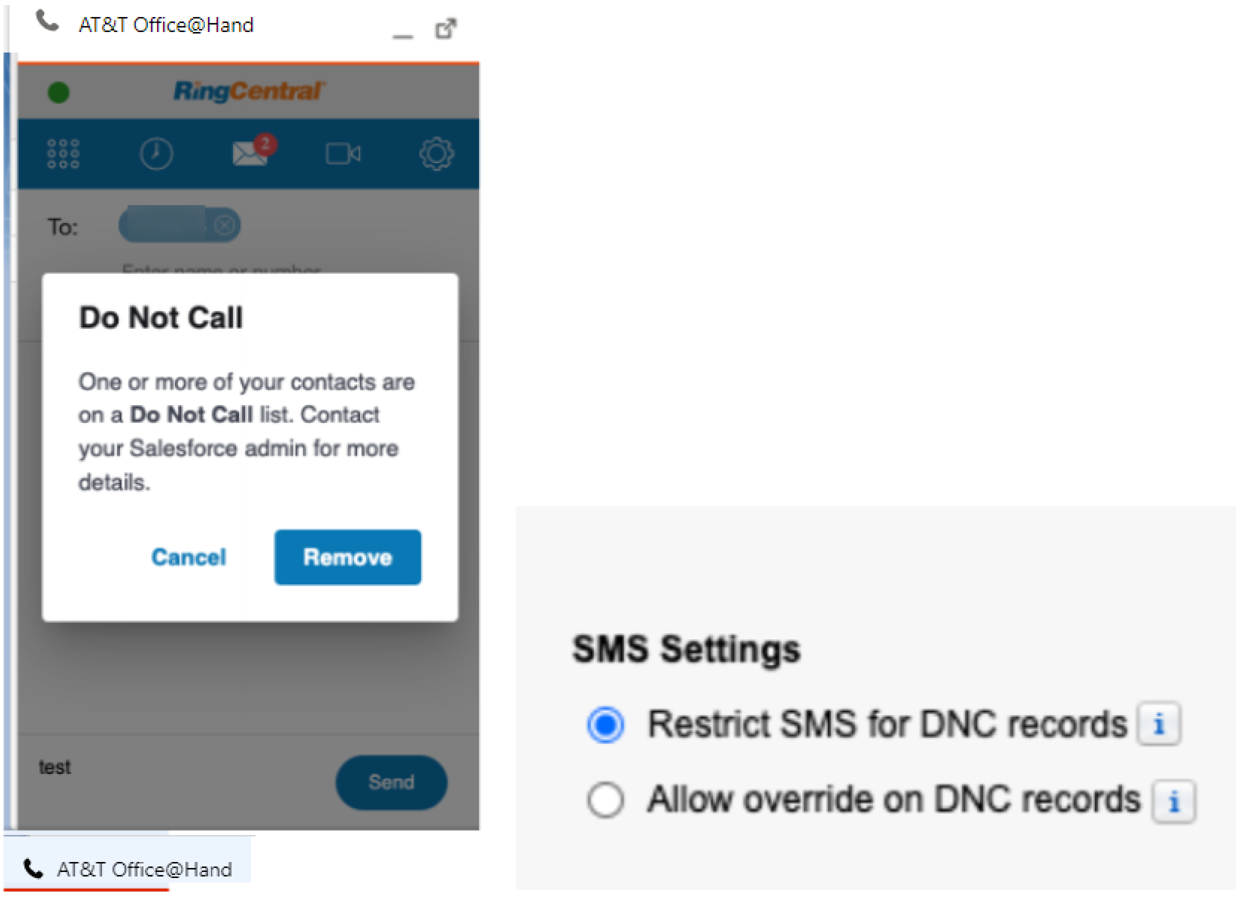
5. The DNC call settings
    a. **Restrict calls for DNC records**: In this mode, end users will not be able to make calls to DNC records with Office@Hand for Salesforce. A notification will pop up when the end user initiates a call stating they cannot place the call as the record is on DNC.



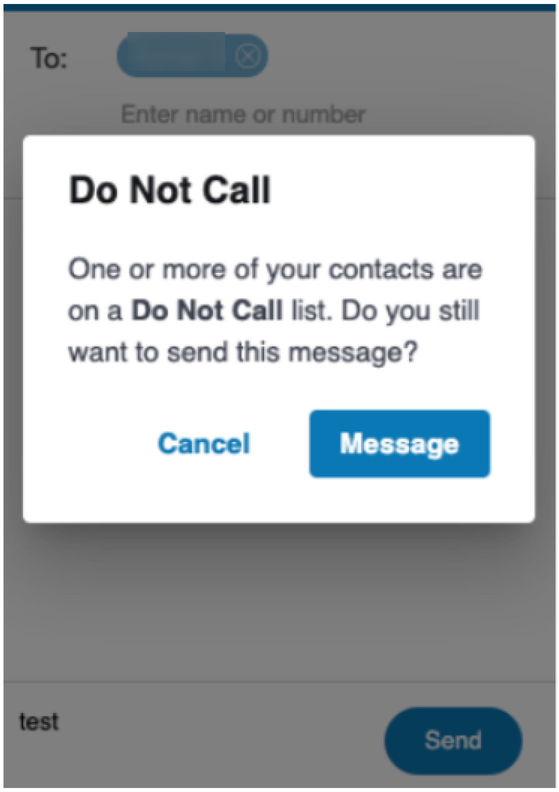
b. **Override and call DNC records**: In this mode, when the end user is trying to make calls to DNC records with Office@Hand for Salesforce, they will be notified that this is a DNC record, but the end user will still be given the capability to override and make calls.

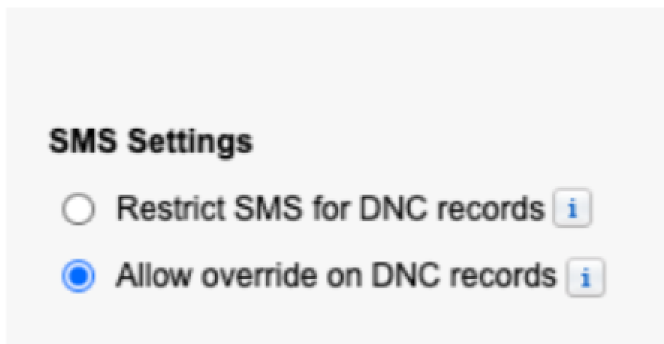


6. The DNC SMS settings
    a. **Restrict SMS for DNC records**: In this mode, end users will not be able to SMS DNC records with Office@Hand for Salesforce. A notification will pop up and alert the user.



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. The end user will need a reload (refresh or next login) to inherit the setting.

Note: DNC calling might introduce an impact on performance. When the end user is trying to make a call with a phone number, CTI will first 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?

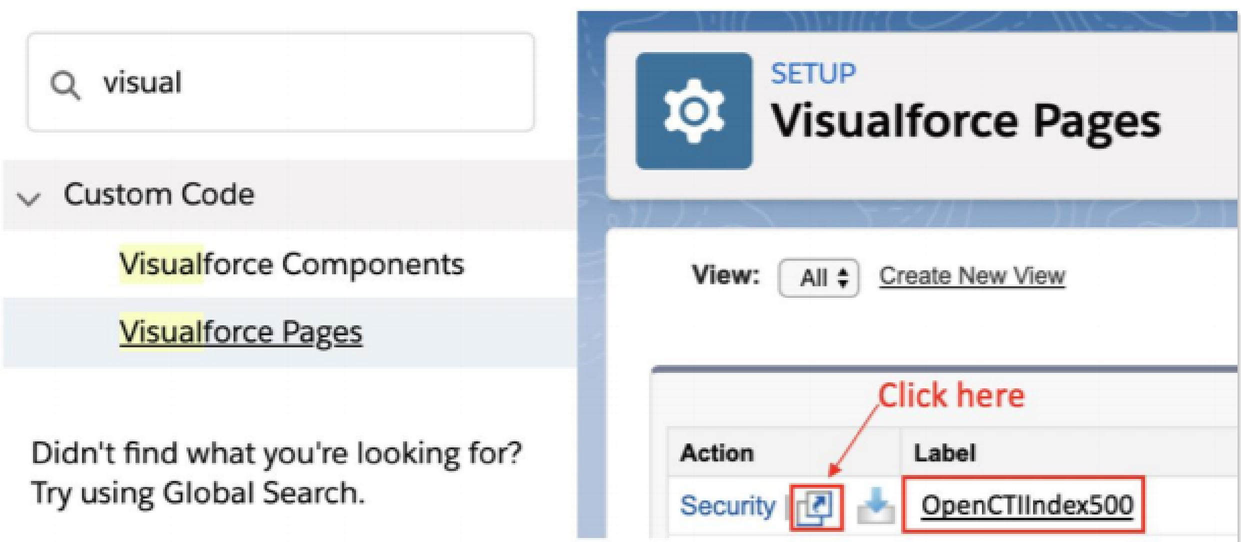
A: First, navigate to **App Setup > Call Center > Customize Call Centers** and verify that the CTI Adapter URL is pointing at /apex/Office@Hand OpenCTIIndex#/

If it is not pointing at the URL above, 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.

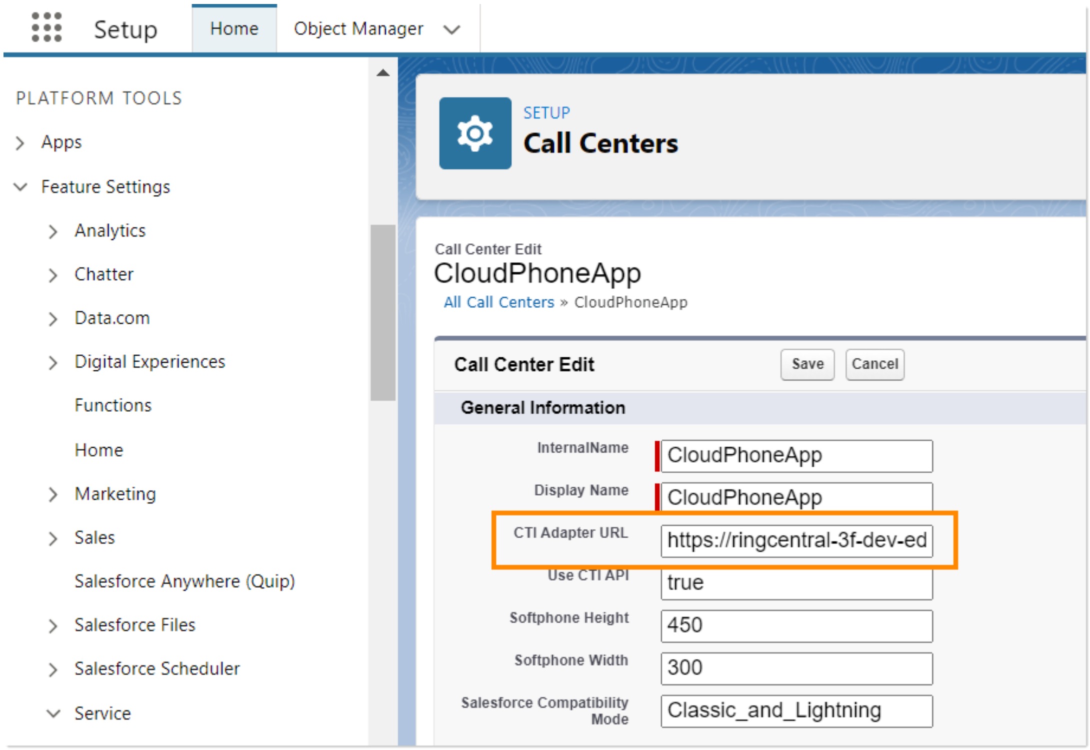
A: You can roll back to the previous 5.x version by following the steps below.

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

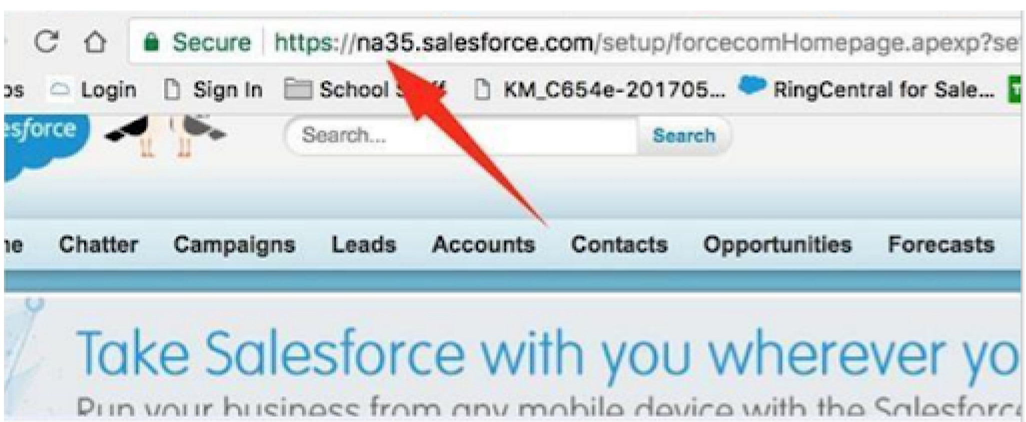


2. After the page opens in a new tab or window, copy its URL. For example, the full URL is: https://c.na78.visual.force.com/apex/OpenCTIIndex500#/login. Copy the following part of the URL: https://c.na78.visual.force.com/apex/OpenCTIIndex500.
3. Close the tab and return to **Setup Home > Call Centers**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

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.

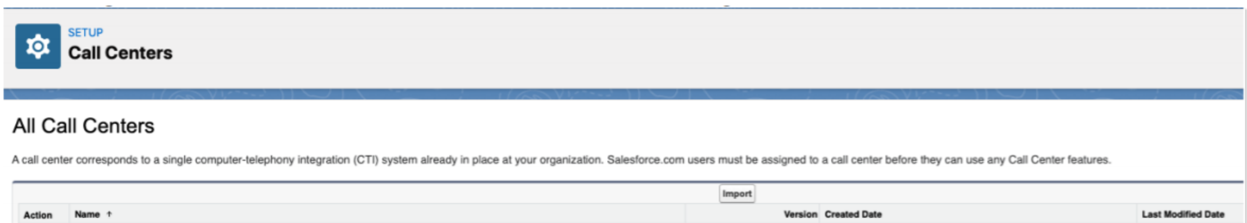
1. Copy the content below into a file and save it as RCCallCenter.xml

```
<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 that you copy-paste the valid **OpenCTI URL** in the call center.