

AT&T Office@Hand for Salesforce Lightning

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.

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.



[Sign in](#)

[← Back](#)

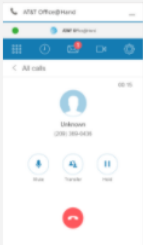
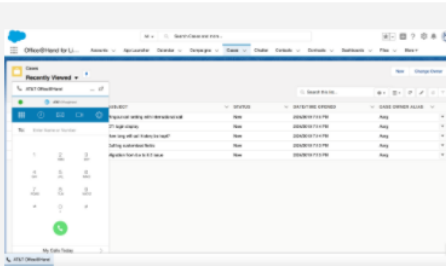


Office@Hand for Salesforce

by RingCentral

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

[Visit page to download](#)



CATEGORIES

[Analytics](#)

[CRM](#)

[Customer Support](#)

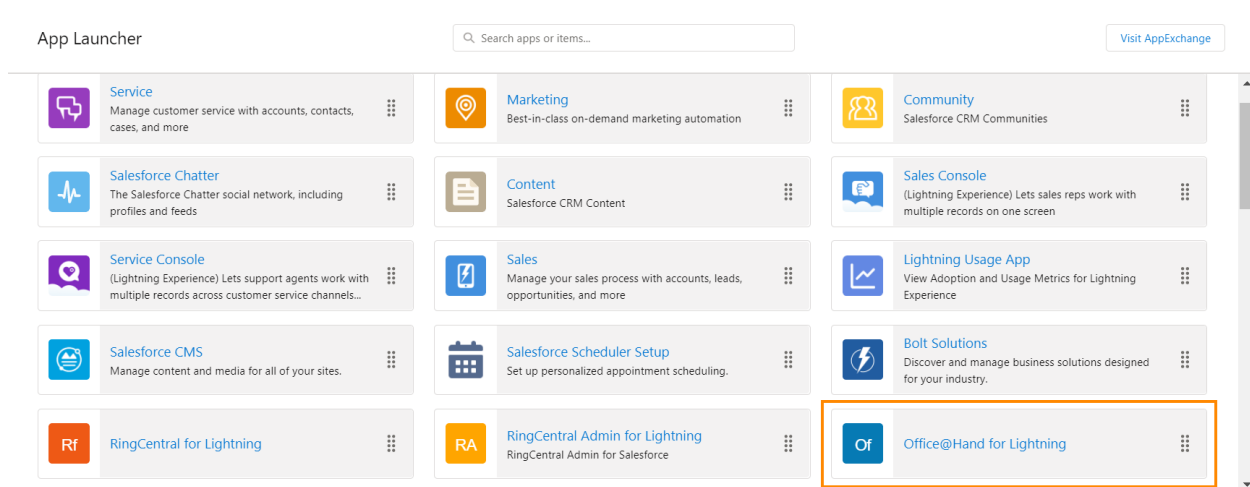
Salesforce App Integration for Office@Hand

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

Steps for setup and configurations for first-time installation

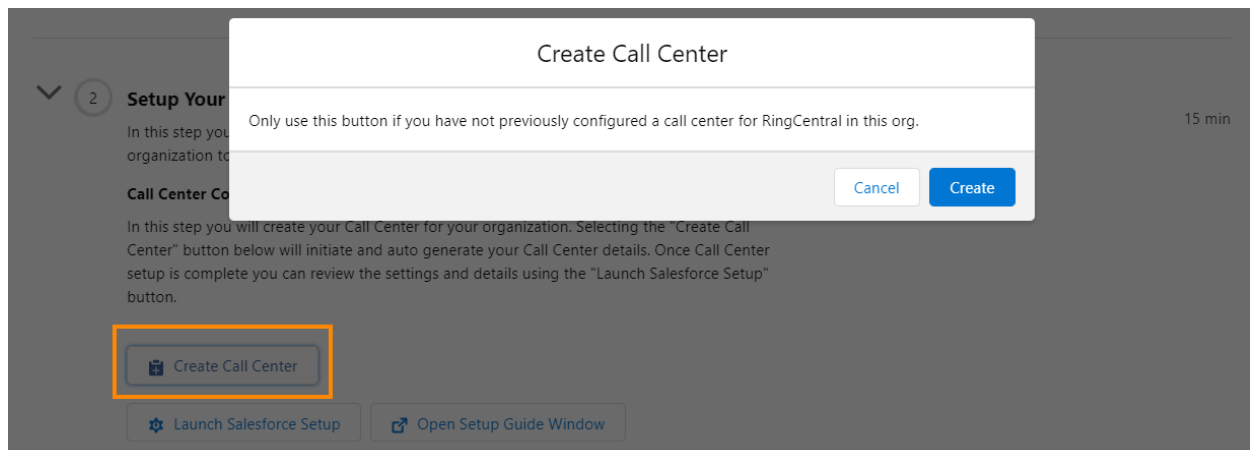
If this is the first time you have installed Office@Hand for Salesforce, you can use the new Install wizard tool to set up & configure the CTI. Please follow the steps below to access the Install wizard and start your setup and configuration.

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.

 **SETUP**
Call Centers

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

Call Center Detail Edit Delete Clone

General Information

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

Dialing Options

Outside Prefix	9
Long Distance Prefix	1
International Prefix	01

Call Center Users Manage Call Center Users

Call Center Users by Profile

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

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



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](#)

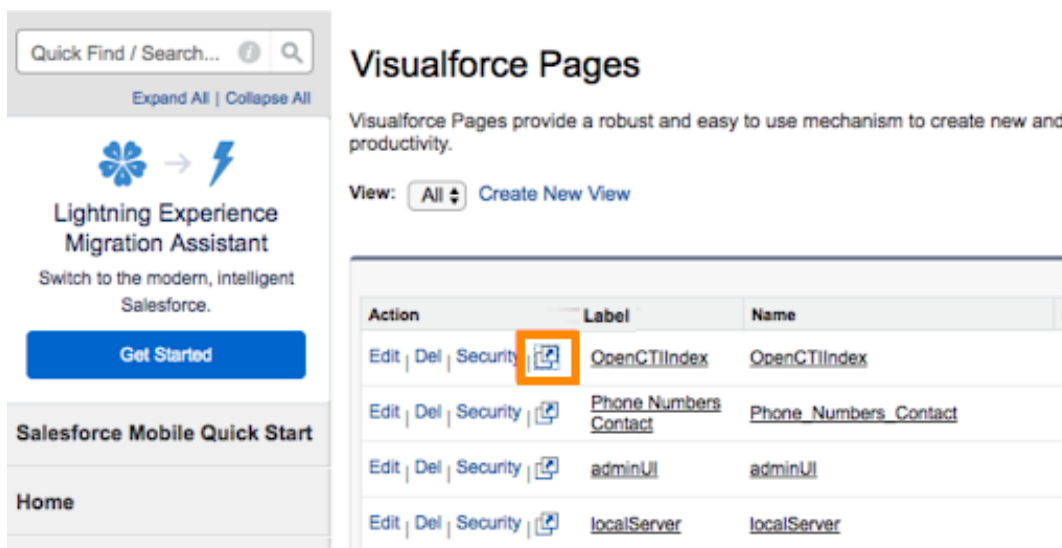
Steps 5 through 7 of the wizard walk you through enabling additional settings such as Mobile experience, Analytics, configuring softphone layout, and Admin settings for the Office@Hand app.


Steps for setup and configurations for an upgrade to 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.



Quick Find / Search... 

Expand All | Collapse All


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





Salesforce Mobile Quick Start

Home

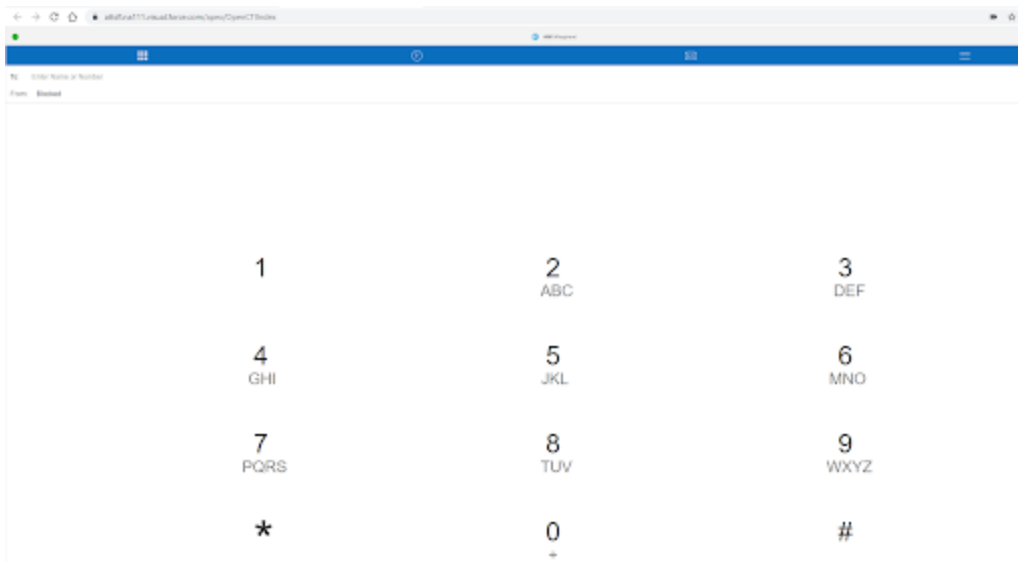
Visualforce Pages

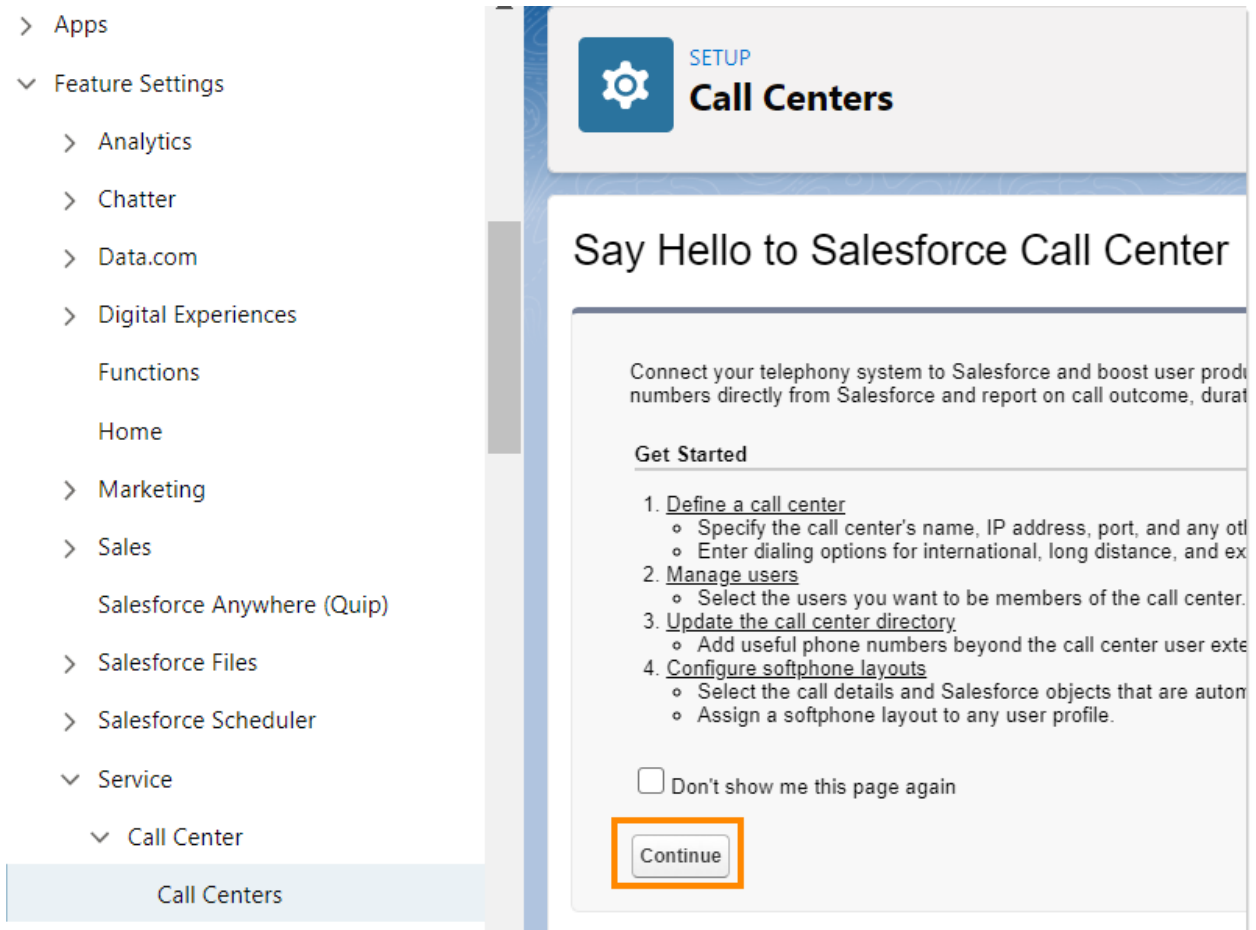
Visualforce Pages provide a robust and easy to use mechanism to create new and productivity.

View: [All](#) [Create New View](#)

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

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





The screenshot shows the Salesforce Admin Center interface. On the left is a navigation sidebar with the following items: Apps, Feature Settings (expanded), Analytics, Chatter, Data.com, Digital Experiences, Functions, Home, Marketing, Sales, Salesforce Anywhere (Quip), Salesforce Files, Salesforce Scheduler, Service (expanded), and Call Center (expanded). The 'Call Centers' item is highlighted. The main content area is titled 'SETUP Call Centers' and features a header 'Say Hello to Salesforce Call Center'. Below the header, a paragraph states: 'Connect your telephony system to Salesforce and boost user productivity by routing calls directly from Salesforce and report on call outcome, duration, and more.' A 'Get Started' section follows with a numbered list of four steps: 1. Define a call center (with sub-points for specifying name, IP, port, and dialing options), 2. Manage users (with sub-point for selecting members), 3. Update the call center directory (with sub-point for adding phone numbers), and 4. Configure softphone layouts (with sub-points for selecting call details and assigning softphone layouts). At the bottom of the list is a checkbox labeled 'Don't show me this page again'. A 'Continue' button is located at the bottom of the page, highlighted with an orange border.

> Apps

▼ Feature Settings

- > Analytics
- > Chatter
- > Data.com
- > Digital Experiences
- Functions
- Home
- > Marketing
- > Sales
- Salesforce Anywhere (Quip)
- > Salesforce Files
- > Salesforce Scheduler

▼ Service

- ▼ Call Center

Call Centers

SETUP Call Centers

Say Hello to Salesforce Call Center

Connect your telephony system to Salesforce and boost user productivity by routing calls directly from Salesforce and report on call outcome, duration, and more.

Get Started

1. Define a call center
 - Specify the call center's name, IP address, port, and any other details.
 - Enter dialing options for international, long distance, and external calls.
2. Manage users
 - Select the users you want to be members of the call center.
3. Update the call center directory
 - Add useful phone numbers beyond the call center user extension.
4. Configure softphone layouts
 - Select the call details and Salesforce objects that are automatically updated.
 - Assign a softphone layout to any user profile.

☐ Don't show me this page again

[Continue](#)

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

PLATFORM TOOLS

- > Apps
- ▼ Feature Settings
 - > Analytics
 - > Chatter
 - > Data.com
 - > Digital Experiences
 - Functions
 - Home
 - > Marketing

SETUP
Call Centers

All Call Centers

A call center corresponds to a single computer-telephony integration (CTI) adapter. Each user must be assigned to a call center before they can use the call center.

Action	Name ↑
Edit Del	CloudPhoneApp

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**.

Setup Home Object Manager ▼

PLATFORM TOOLS

- > Apps
- ▼ Feature Settings
 - > Analytics
 - > Chatter
 - > Data.com
 - > Digital Experiences
 - Functions
 - Home
 - > Marketing
 - > Sales
 - Salesforce Anywhere (Quip)
 - > Salesforce Files
 - > Salesforce Scheduler
 - ▼ Service

SETUP
Call Centers

Call Center Edit CloudPhoneApp

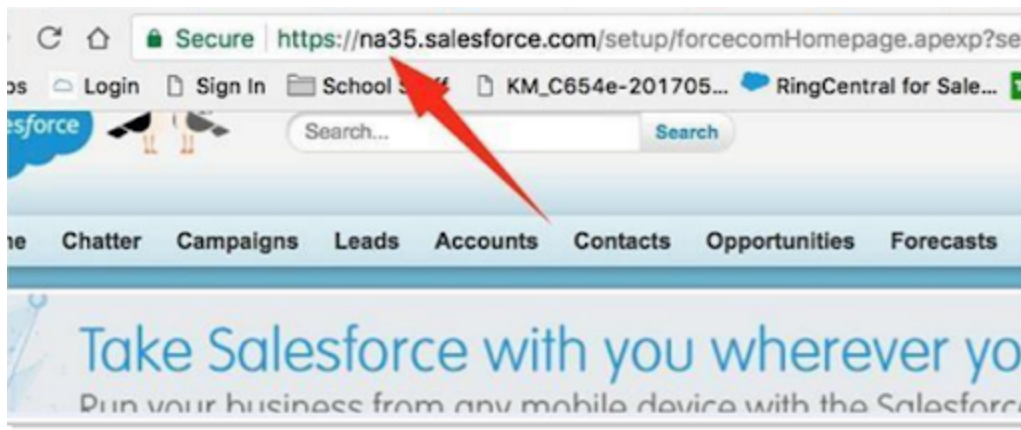
[All Call Centers](#) > CloudPhoneApp

Call Center Edit [Save](#) [Cancel](#)

General Information

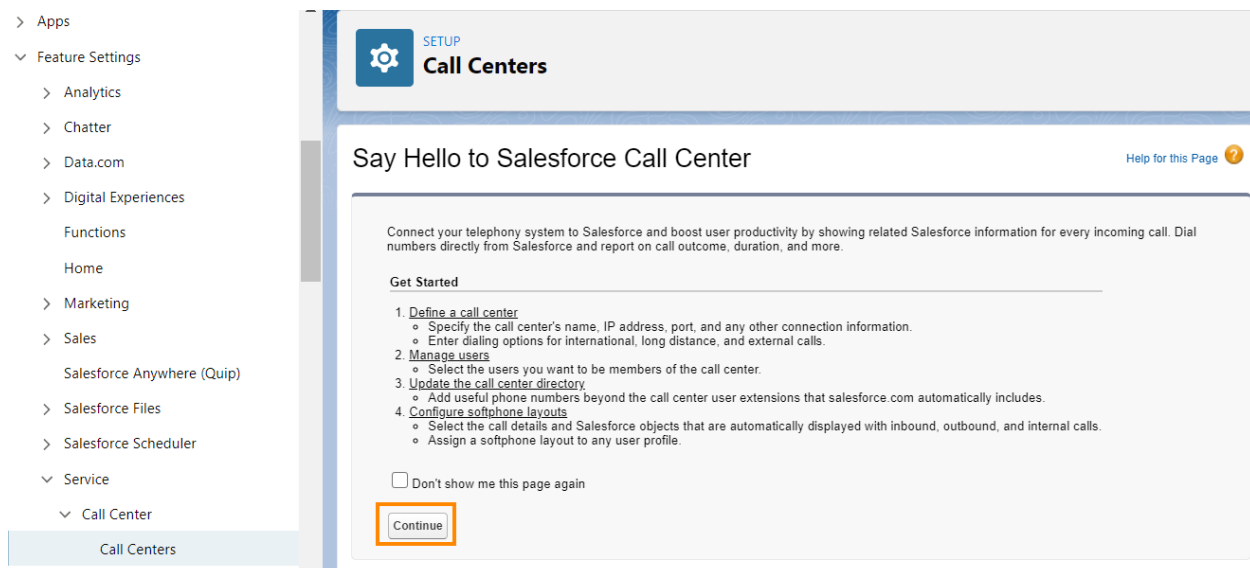
InternalName	CloudPhoneApp
Display Name	CloudPhoneApp
CTI Adapter URL	https://ringcentral-3f-dev-ed
Use CTI API	true
Softphone Height	450
Softphone Width	300
Salesforce Compatibility Mode	Classic_and_Lightning

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.



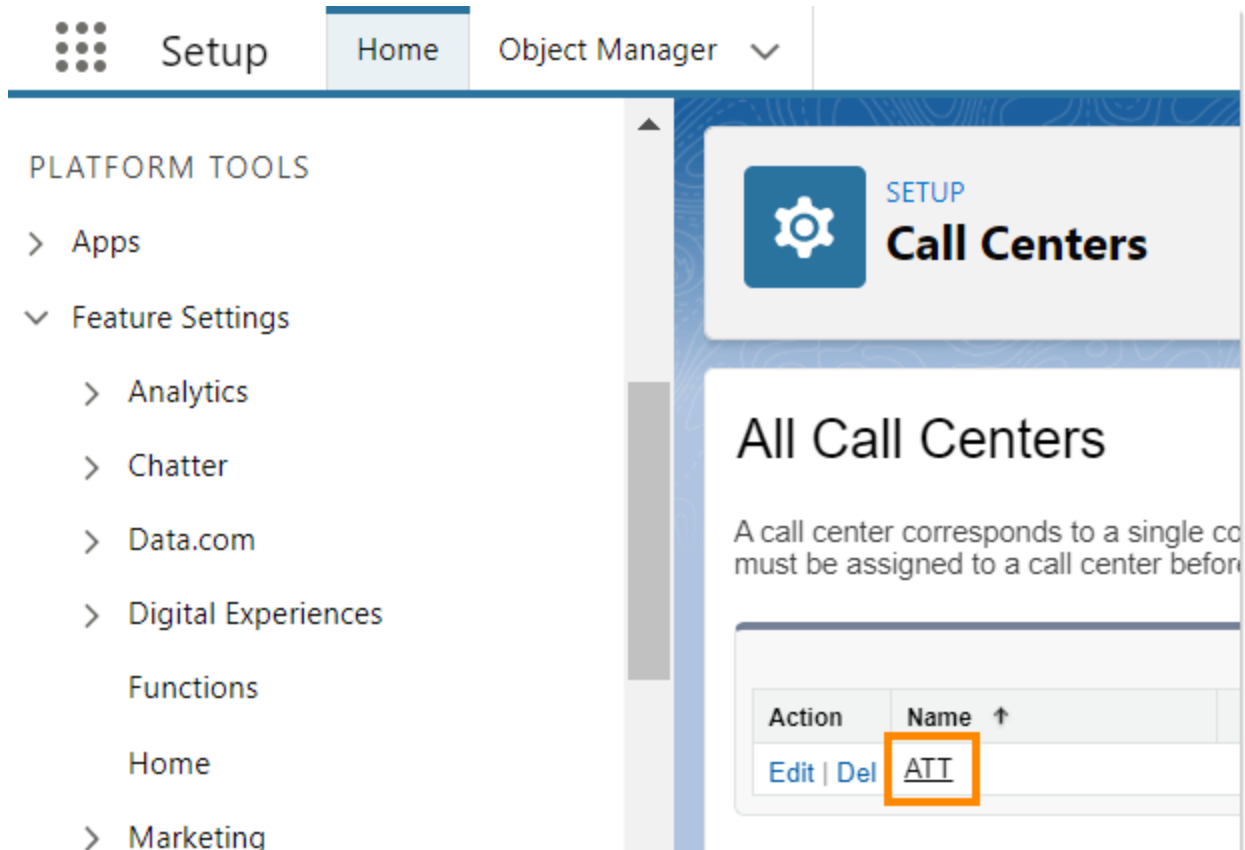
Step 3: Add Users to the Call Center

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.

PLATFORM TOOLS

- > Apps
- ▼ Feature Settings
 - > Analytics
 - > Chatter
 - > Data.com
 - > Digital Experiences
 - Functions
 - Home
 - > Marketing
 - > Sales
 - Salesforce Anywhere (Quip)
 - > Salesforce Files
 - > Salesforce Scheduler
 - ▼ Service
 - ▼ Call Center
 - Call Centers
 - Directory Numbers
 - Softphone Layouts



SETUP

Call Centers

Call Center

ATT[All Call Centers](#) » ATT**Call Center Detail**

Edit

Delete

Clone

General Information

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

Dialing Options

Outside Prefix	9
Long Distance Prefix	1
International Prefix	01

Call Center Users

Manage Call Center Users

Call Center Users by Profile

SETUP

Call Centers

Call Center

ATT: Manage Users[All Call Centers](#) » ATT » Manage UsersView: All ▼ [Create New View](#)

A | B

Add More Users

Remove Users

Full Name ↑

Alias

Username

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--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		AND
--None--	▼	--None--	▼		

Filter By Additional Fields (Optional):

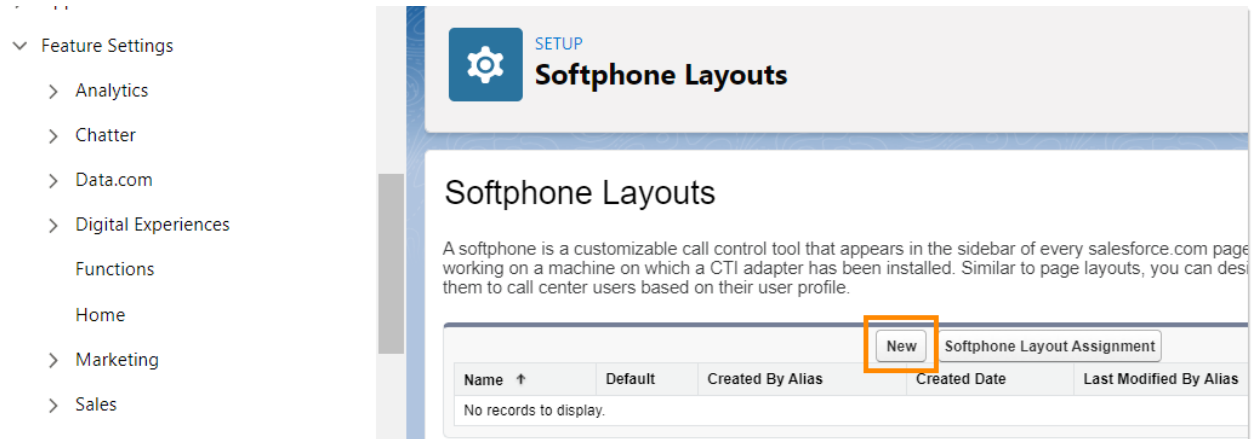
- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 8/24/2021
- For date/time fields, enter the value in following format: 8/24/2021, 4:54 AM

Find

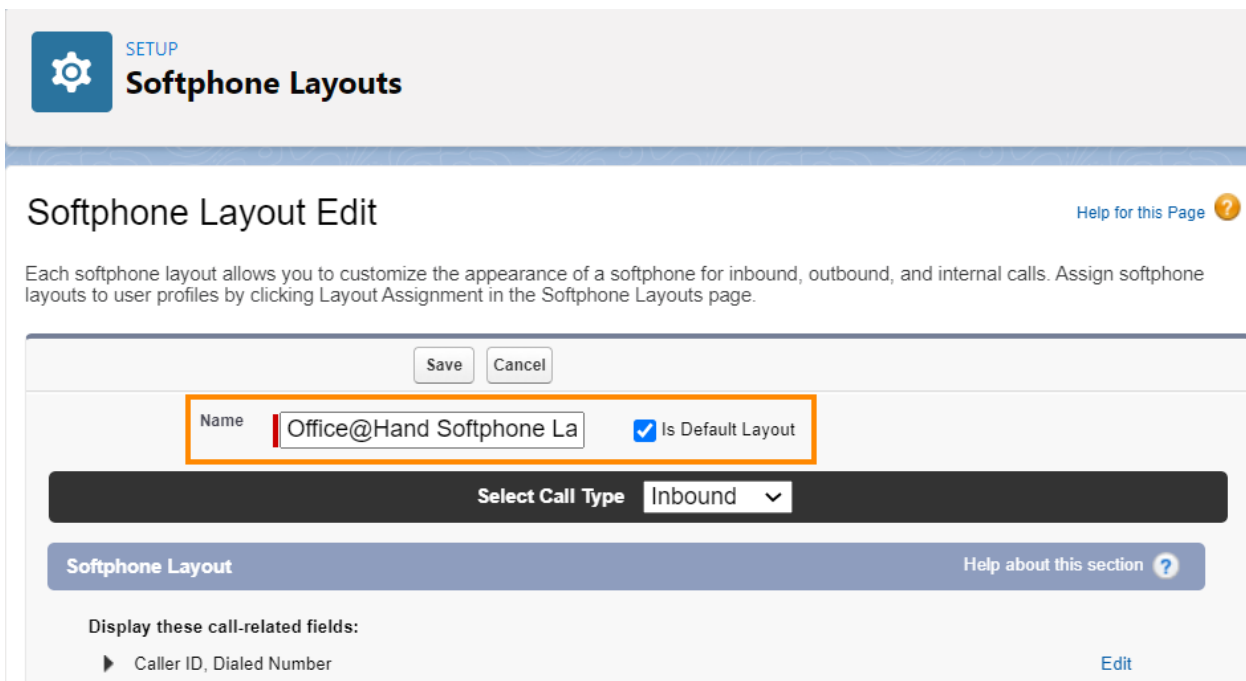
Setting up SoftPhone Layouts in Salesforce

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

SaveCancel

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

▶ **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.

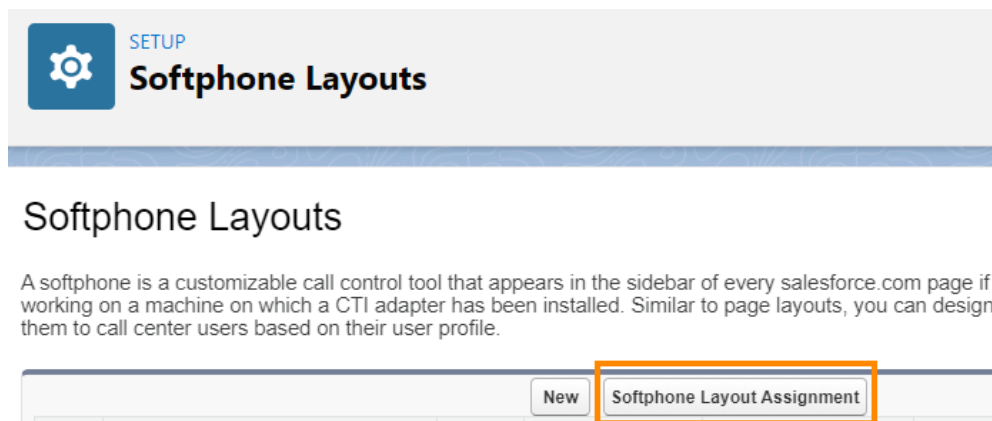
The screenshot shows the 'Screen Pop Settings' configuration page. It has a header bar with the title 'Screen Pop Settings' and a 'Help about this section' link. Below the header are four expandable sections, each with a 'Collapse' link on the right. The first section, 'Screen pops open within: New browser window or tab', has two radio buttons: 'Existing browser window' and 'New browser window or tab' (which is selected). The second section, 'No matching records: Pop to new Contact', has four options: 'Don't pop any screen', 'Pop to new' (selected) with a dropdown menu showing 'Contact', 'Pop to Visualforce page' with a text input field, and 'Pop to flow' with a dropdown menu showing '--None--'. The third section, 'Single-matching record: Pop detail page', has four options: 'Don't pop any screen', 'Pop detail page' (selected), 'Pop to Visualforce page' with a text input field, and 'Pop to flow' with a dropdown menu showing '--None--'. The fourth section, 'Multiple-matching records: Pop to search page', has four options: 'Don't pop any screen', 'Pop to search page' (selected), 'Pop to Visualforce page' with a text input field, and 'Pop to flow' with a dropdown menu showing '--None--'.

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

The screenshot shows the 'Softphone Layout Edit' page in Salesforce Setup. At the top, there's a 'SETUP' header with a gear icon and the title 'Softphone Layouts'. Below this is the 'Softphone Layout Edit' section with a 'Help for this Page' link. A descriptive paragraph explains that softphone layouts allow customization of softphone appearance for inbound, outbound, and internal calls. Below the text, there are 'Save' and 'Cancel' buttons. The 'Name' field contains 'Office@Hand Softphone La' and the 'Is Default Layout' checkbox is checked. A 'Select Call Type' dropdown is set to 'Inbound'. The 'Softphone Layout' section includes a 'Help about this section' link, a 'Display these call-related fields:' section with a dropdown showing 'Caller ID, Dialed Number' and an 'Edit' link, and a 'Display these salesforce.com objects:' section with a dropdown showing 'Account, Contact, Lead' and an 'Add / Remove Objects' link. Below this, there's a conditional display rule: 'If single Account found, display: Account Name' with a note about multiple matches and an 'Edit' link.

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.



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)

-- Default --
-- Default --
Office@Hand Softphone Layout

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**.

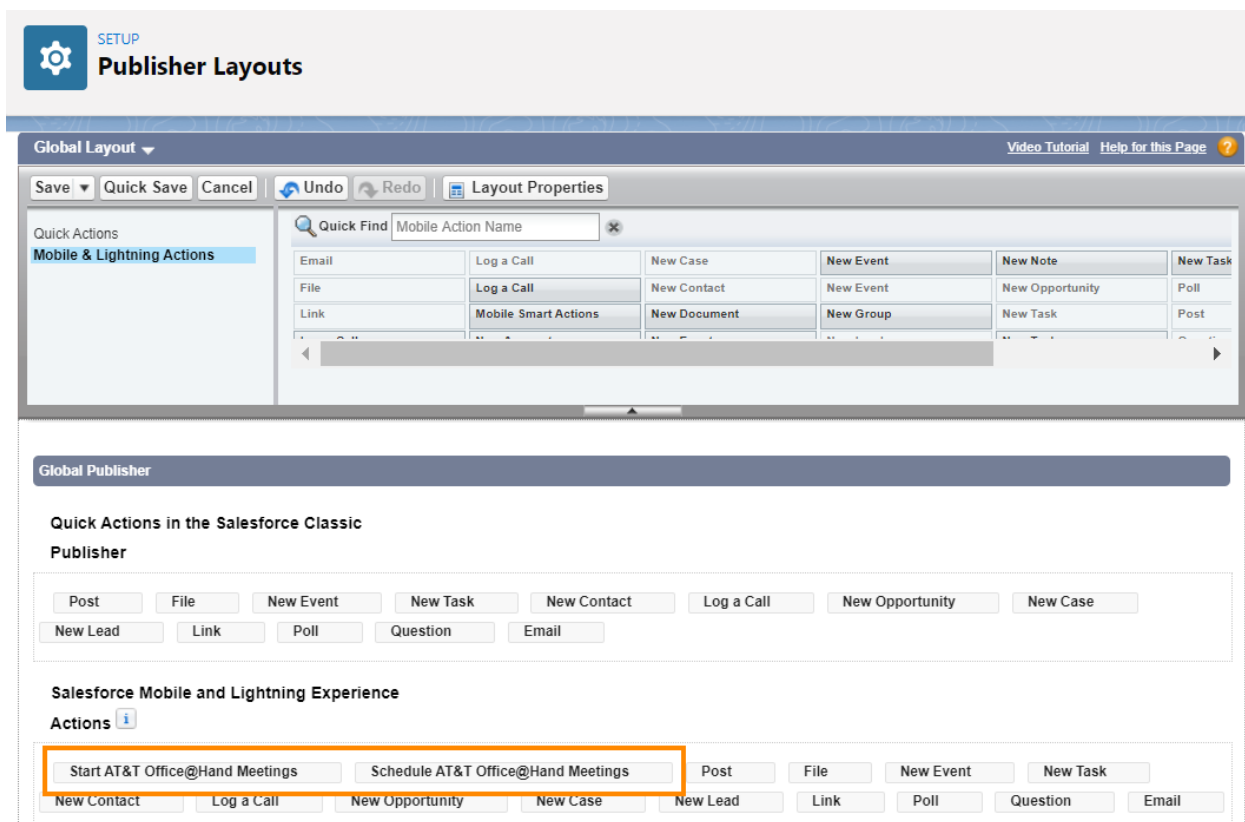
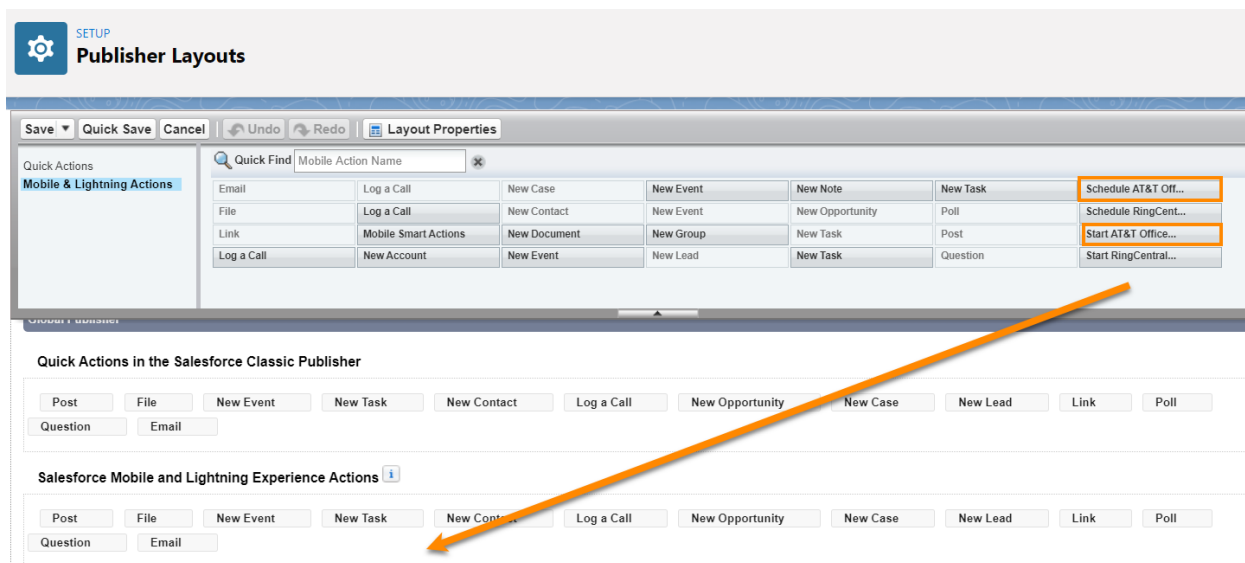
Choose the Layout that you want to configure, then click **Edit**.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Publisher Layouts' is highlighted under 'Global Actions'. The main content area is titled 'Global Publisher Layouts' and includes a description: '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.' Below this, there is a table with the following data:

Action	Publisher Layout Name	Created By	Modified By
Edit Del	Global Layout	Dulcinea D. 8/5/2021, 1:09 PM	Dulcinea D. 8/5/2021, 1:09 PM

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

 **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

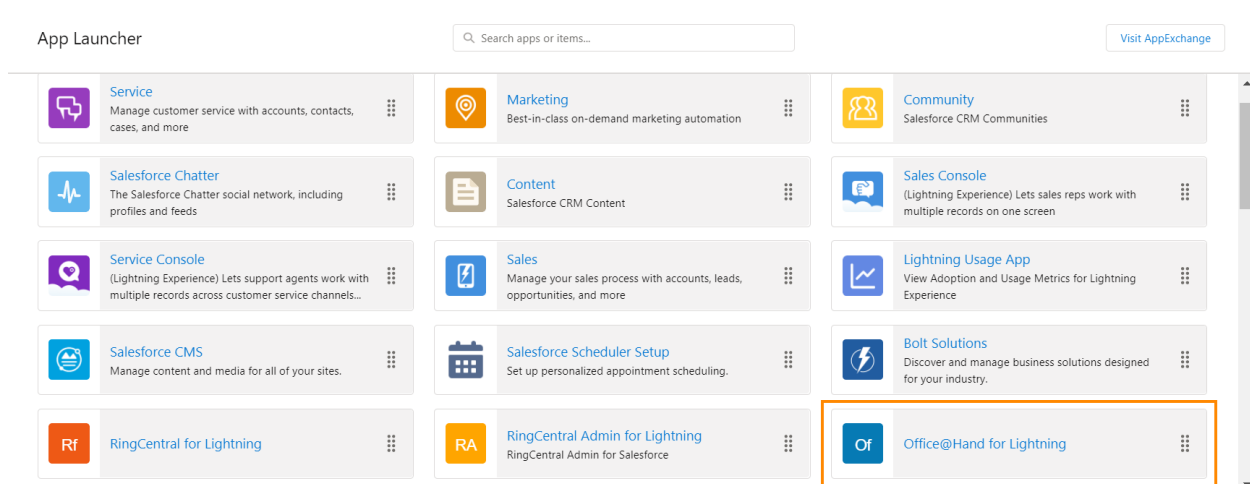
New

Publisher Layout Assignment

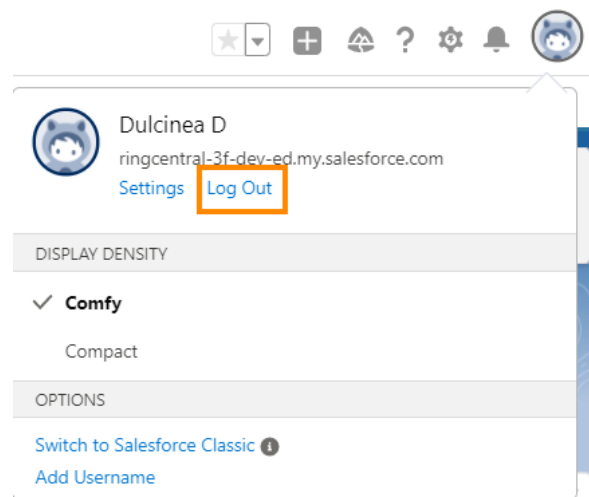
Action	Publisher Layout Name	Created By	Modified By
Edit Del	Global Layout	Dulcinea D. 8/5/2021, 1:09 PM	Dulcinea D. 8/24/2021, 6:00 AM

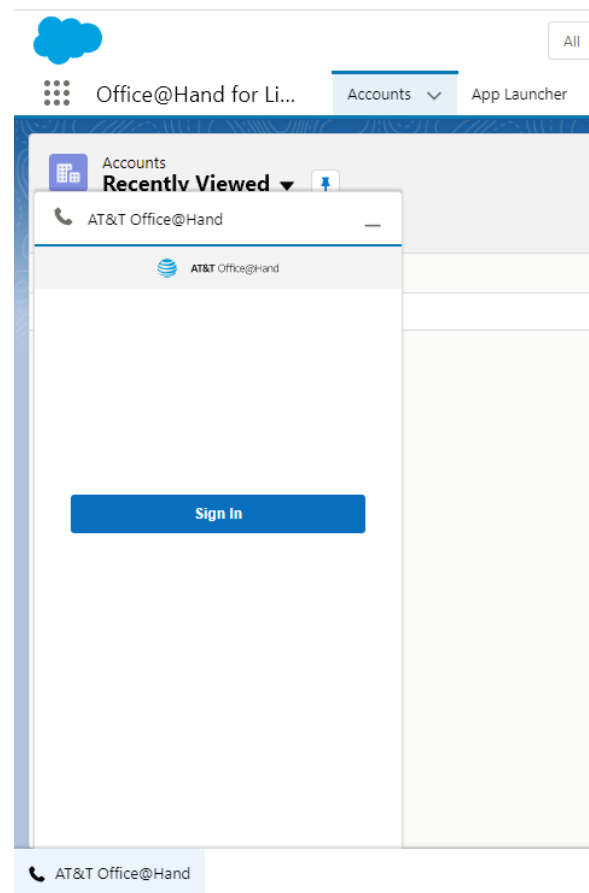
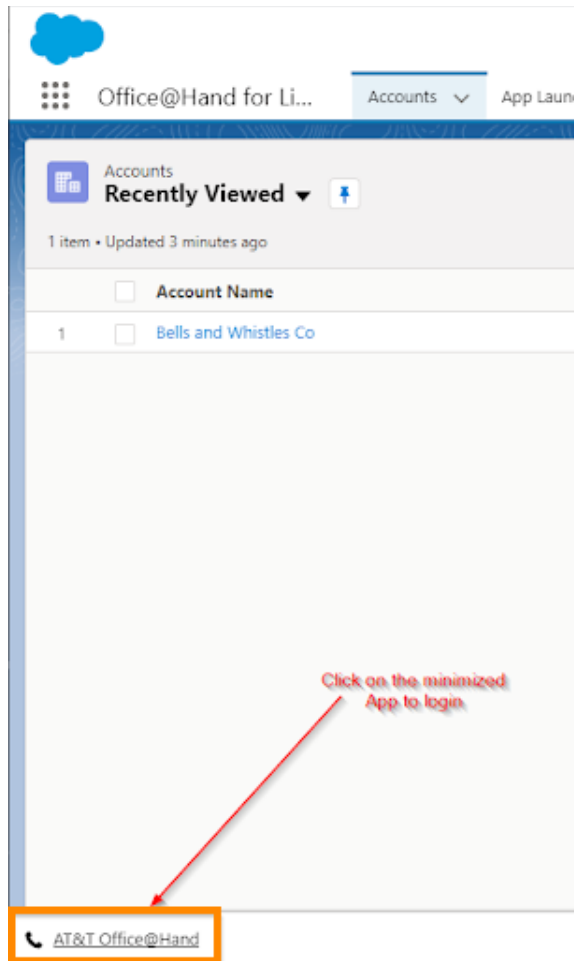
Launching app in Lightning View

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.

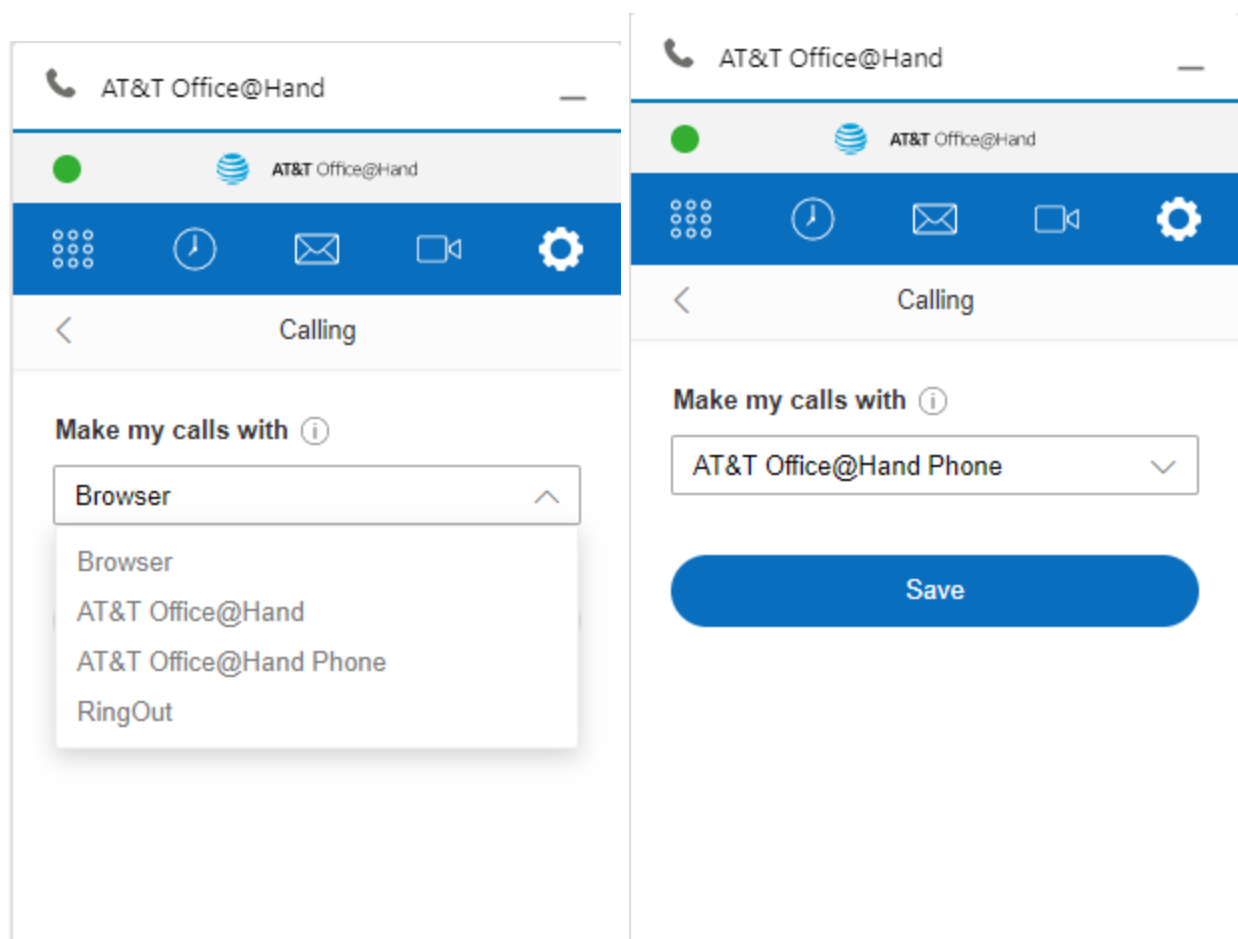


Before Launching the Office@Hand for Lightning app, log out and log in again.



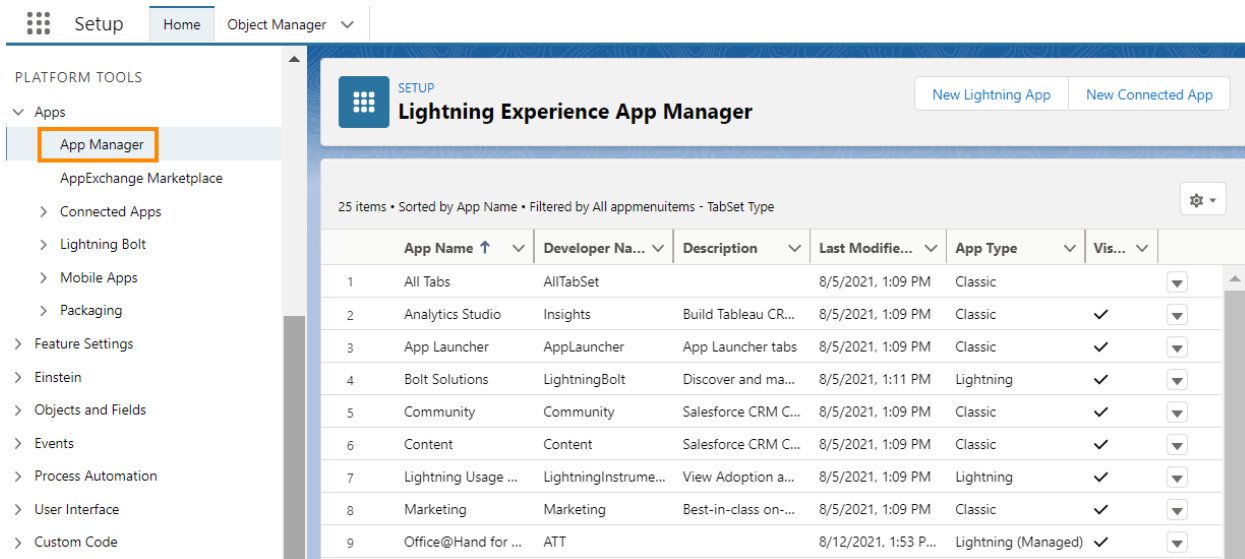


Click the button, and you'll see the Office@Hand app. After signing in, configure the outbound dialing option in setup.



Add Open CTI Softphone to Your Lightning App

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



Setup Home Object Manager

PLATFORM TOOLS

- Apps
 - App Manager**
 - AppExchange Marketplace
 - Connected Apps
 - Lightning Bolt
 - Mobile Apps
 - Packaging
- Feature Settings
- Einstein
- Objects and Fields
- Events
- Process Automation
- User Interface
- Custom Code

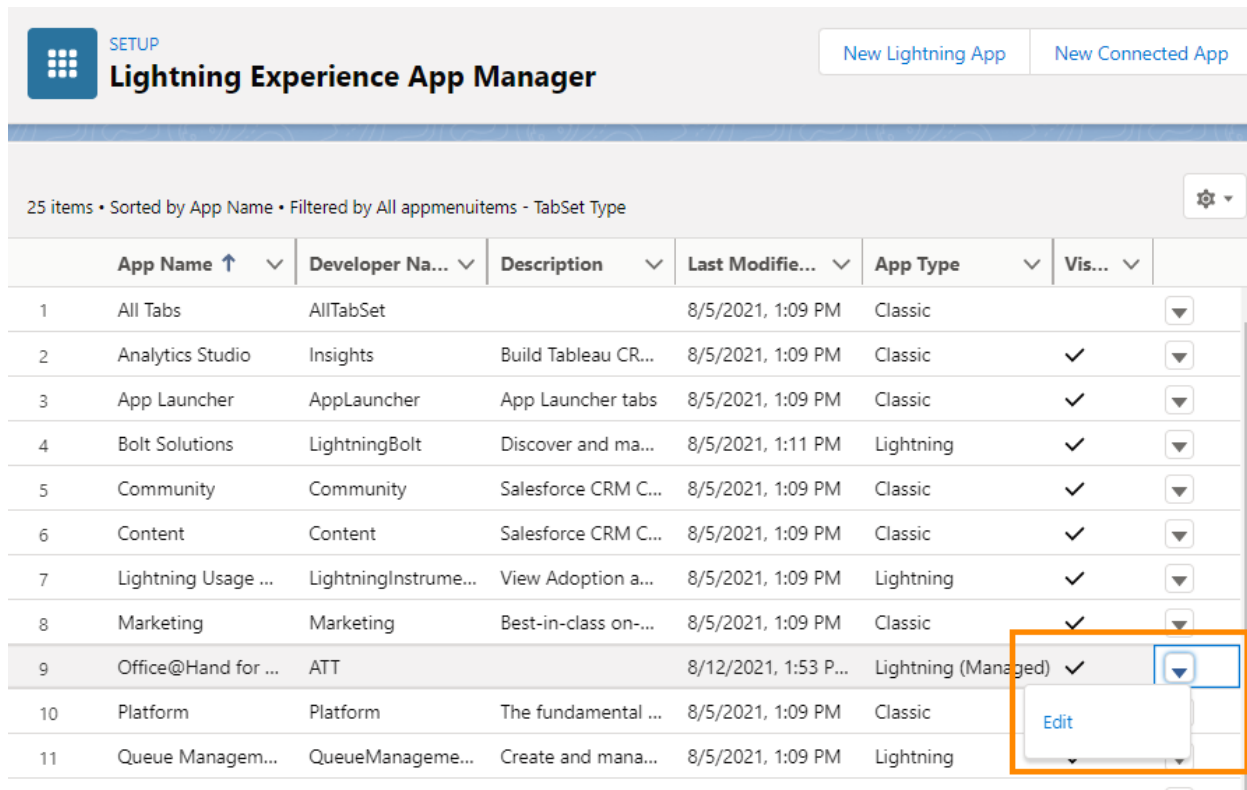
Lightning Experience App Manager

New Lightning App New Connected App

25 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Na...	Description	Last Modifie...	App Type	Vis...	
1	All Tabs	AllTabSet		8/5/2021, 1:09 PM	Classic		
2	Analytics Studio	Insights	Build Tableau CR...	8/5/2021, 1:09 PM	Classic	✓	
3	App Launcher	AppLauncher	App Launcher tabs	8/5/2021, 1:09 PM	Classic	✓	
4	Bolt Solutions	LightningBolt	Discover and ma...	8/5/2021, 1:11 PM	Lightning	✓	
5	Community	Community	Salesforce CRM C...	8/5/2021, 1:09 PM	Classic	✓	
6	Content	Content	Salesforce CRM C...	8/5/2021, 1:09 PM	Classic	✓	
7	Lightning Usage ...	LightningInstrume...	View Adoption a...	8/5/2021, 1:09 PM	Lightning	✓	
8	Marketing	Marketing	Best-in-class on-...	8/5/2021, 1:09 PM	Classic	✓	
9	Office@Hand for ...	ATT		8/12/2021, 1:53 P...	Lightning (Managed)	✓	

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



25 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Na...	Description	Last Modifie...	App Type	Vis...	
1	All Tabs	AllTabSet		8/5/2021, 1:09 PM	Classic		▼
2	Analytics Studio	Insights	Build Tableau CR...	8/5/2021, 1:09 PM	Classic	✓	▼
3	App Launcher	AppLauncher	App Launcher tabs	8/5/2021, 1:09 PM	Classic	✓	▼
4	Bolt Solutions	LightningBolt	Discover and ma...	8/5/2021, 1:11 PM	Lightning	✓	▼
5	Community	Community	Salesforce CRM C...	8/5/2021, 1:09 PM	Classic	✓	▼
6	Content	Content	Salesforce CRM C...	8/5/2021, 1:09 PM	Classic	✓	▼
7	Lightning Usage ...	LightningInstrume...	View Adoption a...	8/5/2021, 1:09 PM	Lightning	✓	▼
8	Marketing	Marketing	Best-in-class on...	8/5/2021, 1:09 PM	Classic	✓	▼
9	Office@Hand for ...	ATT		8/12/2021, 1:53 P...	Lightning (Managed)	✓	▼
10	Platform	Platform	The fundamental ...	8/5/2021, 1:09 PM	Classic		
11	Queue Managem...	QueueManageme...	Create and mana...	8/5/2021, 1:09 PM	Lightning		

Edit

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

The screenshot shows the Lightning App Builder interface for configuring the Utility Bar. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Sales'. The left sidebar lists 'APP SETTINGS' with sub-items: 'App Details & Branding', 'App Options', 'Utility Bar' (selected), 'Select Items', and 'Assign to User Profiles'. The main content area is titled 'Utility Bar' with the subtitle 'Give your users quick access to common productivity tools.' Below this, there is a section for 'Utility Bar Items' with an 'Add' button. A single item, 'Phone', is currently configured. The item's properties are shown on the right, including the label 'Open CTI Softphone', the icon 'call', and dimensions of 340x480. The 'Load in background when app opens' checkbox is checked.

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

APP SETTINGS

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

Utility Bar

Give your users quick access to common productivity tools.

Utility Bar Items [Add](#)

Phone

PROPERTIES
Open CTI Softphone

↑ ↓ [Remove](#)

▼ **Utility Item Properties**

* Label ⓘ
Phone

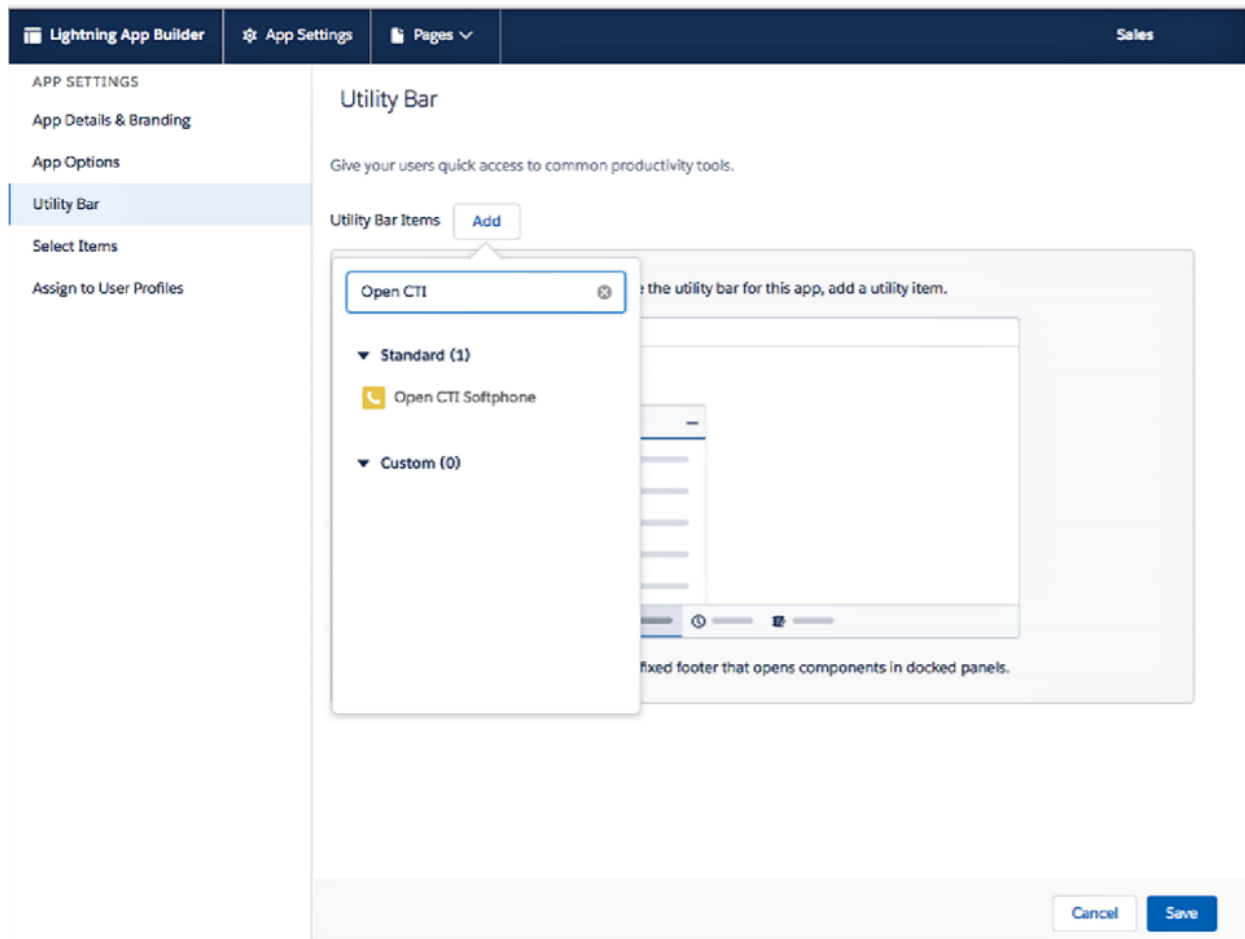
Icon ⓘ
call X

Panel Width ⓘ
340

Panel Height ⓘ
480

☒ Load in background when app opens ⓘ

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



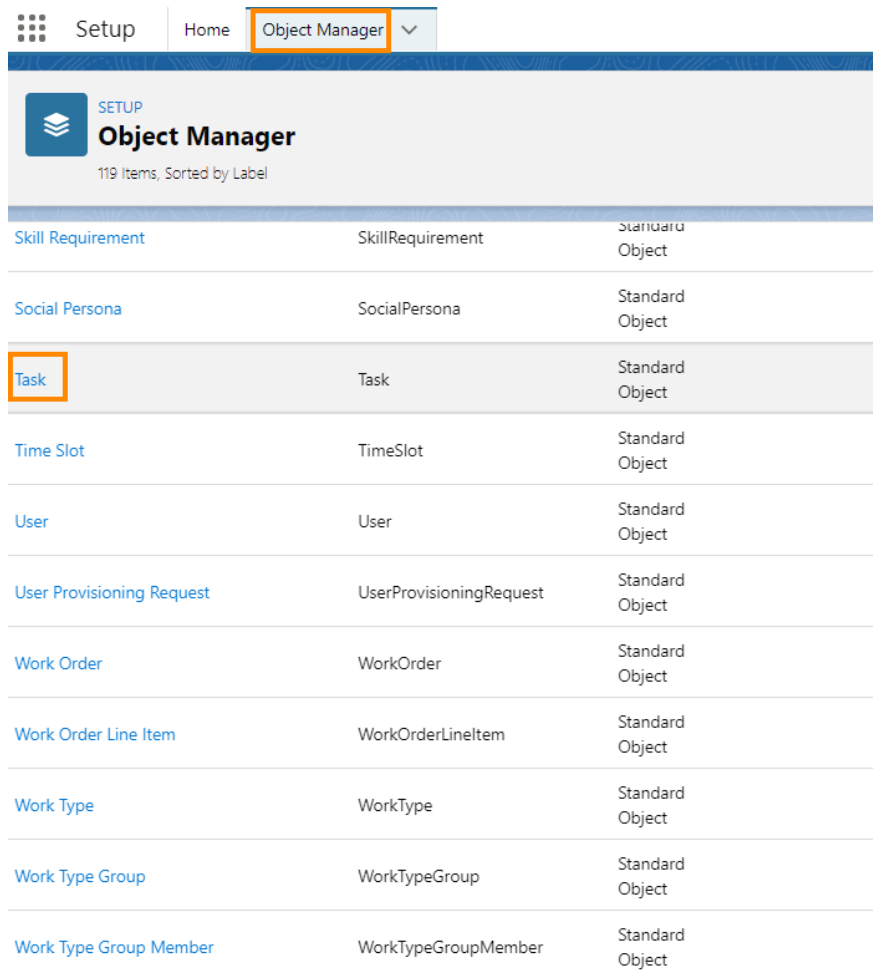
Launch the app from **App Launcher**, and you'll see the Office@Hand app in the **Utility Bar**.

The screenshot shows the Lightning App Builder interface for configuring the Utility Bar. The left sidebar contains the following menu items: APP SETTINGS, App Details & Branding, App Options, **Utility Bar** (highlighted), Select Items, and Assign to User Profiles. The main content area is titled "Utility Bar" and includes the instruction "Give your users quick access to common productivity tools." Below this, there is a "Utility Bar Items" section with an "Add" button. A card titled "Phone" is displayed, showing a preview of the utility bar item. To the right of the preview are the "PROPERTIES" for the item, which include: "Open CTI Softphone" (with up/down arrows and a "Remove" button), "Utility Item Properties" (expanded), "Label" (set to "Phone"), "Icon" (set to a phone icon), "Panel Width" (set to "340"), "Panel Height" (set to "480"), and a checked checkbox for "Load in background when app opens". At the bottom right of the configuration area are "Cancel" and "Save" buttons, with the "Save" button highlighted by an orange rectangle.


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	Home	Object Manager
SETUP Object Manager 119 Items, Sorted by Label		
Skill Requirement	SkillRequirement	Standard Object
Social Persona	SocialPersona	Standard Object
Task	Task	Standard Object
Time Slot	TimeSlot	Standard Object
User	User	Standard Object
User Provisioning Request	UserProvisioningRequest	Standard Object
Work Order	WorkOrder	Standard Object
Work Order Line Item	WorkOrderLineItem	Standard Object
Work Type	WorkType	Standard Object
Work Type Group	WorkTypeGroup	Standard Object
Work Type Group Member	WorkTypeGroupMember	Standard Object


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.

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

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

Validation Rules Help ?

No validation rules defined.

Task Subject Picklist Values

New

Reorder

Replace

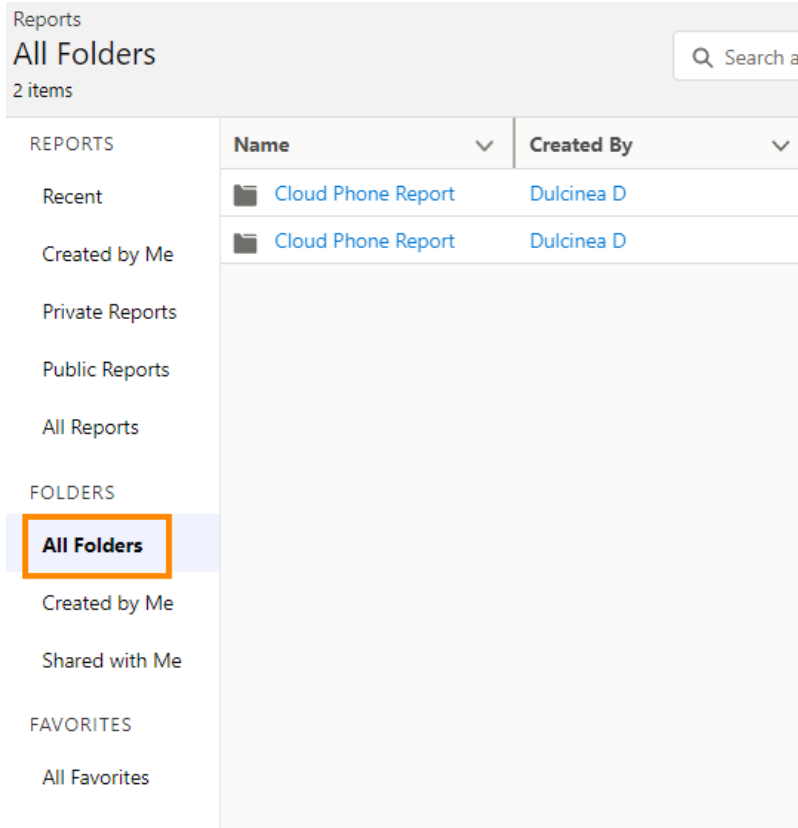
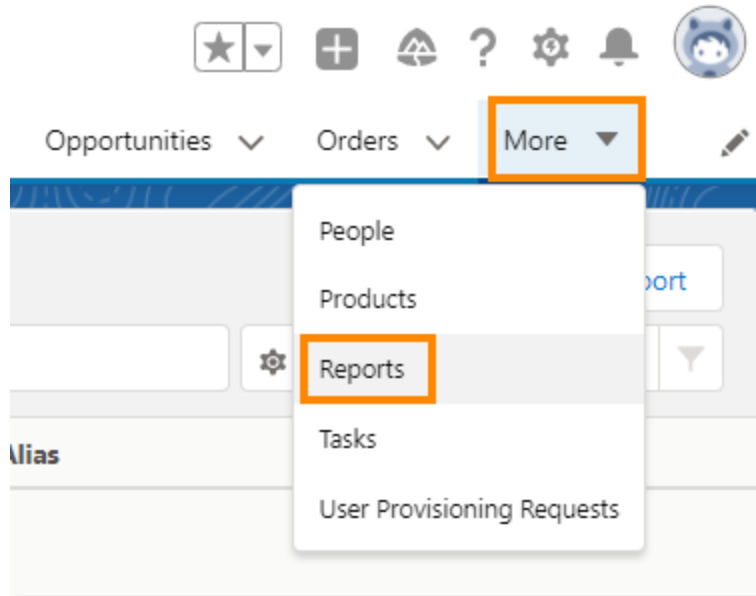
Printable View

Task Subject Picklist Values Help ?

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

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*.

Name	Created By	Created On	Last Modified By	Last Modified Date	
Cloud Phone Report	Dulcinea D	8/11/2021, 4:33 PM	Dulcinea D	8/11/2021, 4:33 PM	⌵
Cloud Phone Report	Dulcinea D	8/12/2021, 1:53 PM	Dulcinea D	8/12/2021, 1:53 PM	

Favorite

Share

Rename

Delete

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

Share folder

These sharing settings apply to all subfolders in this folder.

Share With

Users

Names

Search Users... 🔍

Integration User

Security User

Access

View

Who can access

🔍

Dulcinea D Users

Manage

×

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.

Cloud Phone Settings

Auto Save Setting

Pop matching Salesforce entity record on call ringing

☐ Auto create call log on ringing

Associate Call Log with Person Account

Associate call log with Person Accounts using Related to field.

Log Customization

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

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

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

- **Auto Save Call Log Setting:** Besides the **Screen Pop Settings** you made in **Setup Home > Softphone Layout**, in this section, you can further define when to do the screen pop: whether to pop when an inbound call is ringing or when it's answered. Also, you can 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.

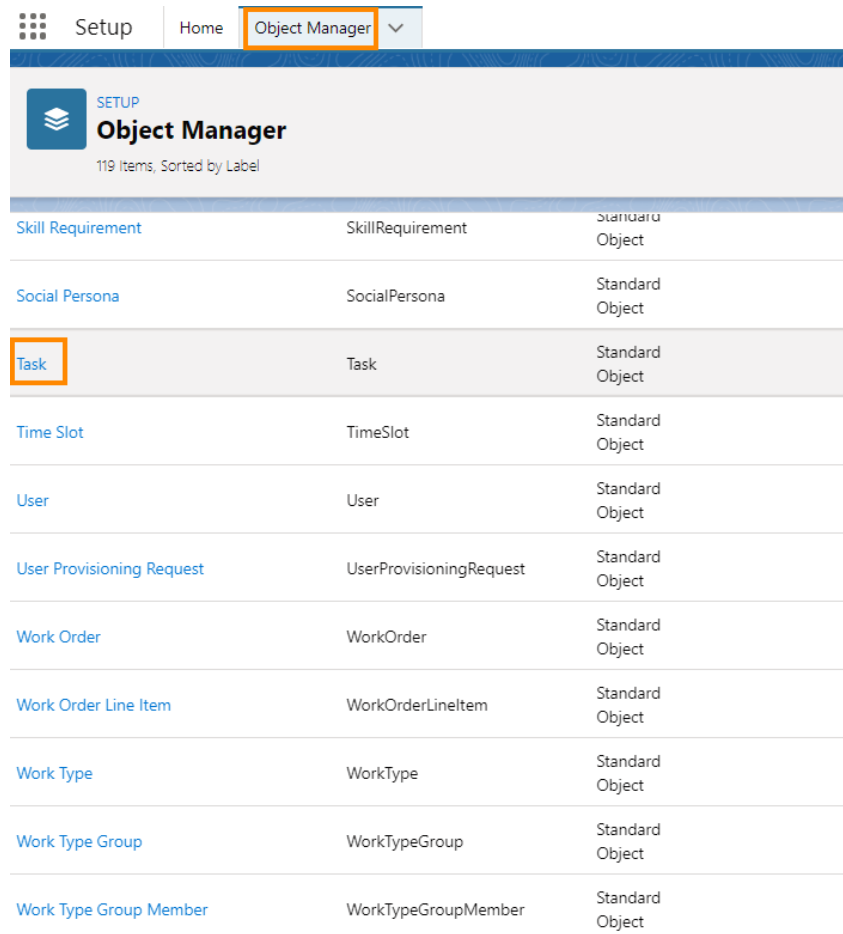
Note: The field types supported in **Call Log** are **Lookup Relationship**, **Date**, **Date/Time**, **Picklist**, **Text**, and **Text Area**. The incoming call pop-up on the new browser tab is not working in Lightning mode, but it works well in Classic mode.

The screenshot shows the Salesforce Setup page for Company Information. The left sidebar contains the navigation menu with 'Company Information' highlighted. The main content area displays the organization's profile for 'ATT'. The 'Organization Detail' section includes fields for Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, and various system settings like 'Enable Data Translation', 'Newsletter', and 'Admin Newsletter'. The 'Salesforce.com Organization ID' field is highlighted with a red box. The bottom of the page shows the 'Created By' and 'Modified By' information.

Organization Detail	
Organization Name	ATT
Primary Contact	Dulcinea D
Division	
Address	USA
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Salesforce.com Organization ID	0005g0000096hvl

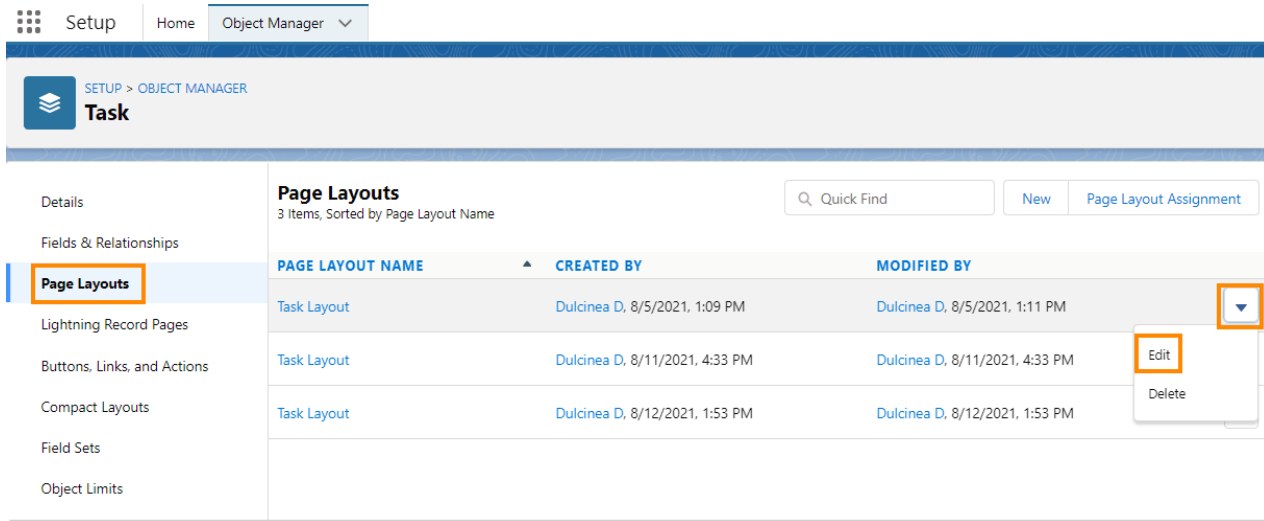
Call Recording

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



Setup	Home	Object Manager
Object Manager 119 Items, Sorted by Label		
Skill Requirement	SkillRequirement	Standard Object
Social Persona	SocialPersona	Standard Object
Task	Task	Standard Object
Time Slot	TimeSlot	Standard Object
User	User	Standard Object
User Provisioning Request	UserProvisioningRequest	Standard Object
Work Order	WorkOrder	Standard Object
Work Order Line Item	WorkOrderLineItem	Standard Object
Work Type	WorkType	Standard Object
Work Type Group	WorkTypeGroup	Standard Object
Work Type Group Member	WorkTypeGroupMember	Standard Object

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



Setup Home Object Manager

SETUP > OBJECT MANAGER
Task

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Page Layouts
3 Items, Sorted by Page Layout Name

Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Task Layout	Dulcinea D, 8/5/2021, 1:09 PM	Dulcinea D, 8/5/2021, 1:11 PM	▼
Task Layout	Dulcinea D, 8/11/2021, 4:33 PM	Dulcinea D, 8/11/2021, 4:33 PM	Edit
Task Layout	Dulcinea D, 8/12/2021, 1:53 PM	Dulcinea D, 8/12/2021, 1:53 PM	Delete

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

The screenshot shows the Salesforce Lightning Object Manager for the **Task** object. The left sidebar lists various configuration areas, with **Page Layouts** selected. The main area displays the **Fields** tab, where a table lists fields available for the layout. An orange box highlights the **Call Recording** field, and an orange arrow points from it to the **Task Detail** section of the page layout editor below.

Fields Table:

Section	Field Name	Field Type
CALL_UNIQUE_ID	CALL_UNIQUE_ID	Call Object Ident...
CALL_UUID	CALL_UUID	Call Recording
Assigned To	CALL_UUID	Call Recording
Comments	Comments	Text
Created By	Created By	Text
external_whoid	external_whoid	Text

Task Detail Section:

Standard Buttons: Change Record Type, Printable View, Edit, Delete, Delete Series, View Series

Custom Buttons: Create Follow-Up Task, Create Follow-Up Event

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 Home > Administration > Users > Roles**, then click **Set Up Roles**.

The screenshot displays the Salesforce Setup interface. On the left, the 'Setup' menu is open, showing the 'Roles' option under the 'Users' section, which is highlighted with an orange box. The main content area is titled 'Roles' and includes a section 'Understanding Roles' with the text: 'Set up your Role Hierarchy to control how your organization reports on and accesses data.' Below this, a 'Sample Role Hierarchy' is shown with a dropdown menu set to 'Territory-based Sample'. The hierarchy diagram illustrates the following structure:

- Executive Staff** (CEO, President, CFO, VP, Sales)
 - Western Sales Director** (Director of W. Sales)
 - Western Sales Rep** (CA Sales Rep, OR Sales Rep)
 - Eastern Sales Director** (Director of E. Sales)
 - Eastern Sales Rep** (NY Sales Rep, MA Sales Rep)
 - International Sales Director** (Director of Int'l Sales)
 - International Sales Rep** (Asian Sales Rep, European Sales Rep)

Permissions for each level are listed to the right of the hierarchy:

- Executive Staff:**
 - * View & edit data, roll up forecasts, & generate reports for all users below
 - * Can't access data of other Executive Staff
- Sales Directors:**
 - * View & edit data, roll up forecasts, & generate reports for all users directly below
 - * Can't access data of users above or at same level
- Sales Reps:**
 - * View & edit data, roll up forecasts, & generate reports only for own data
 - * Can't access data of users above or at same level

At the bottom right of the page, the 'Set Up Roles' button is highlighted with an orange box.

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

Setup Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

> Data

> Email

SETUP Users

Help for this Page

All Users

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

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

View: All Users Edit Create New View

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

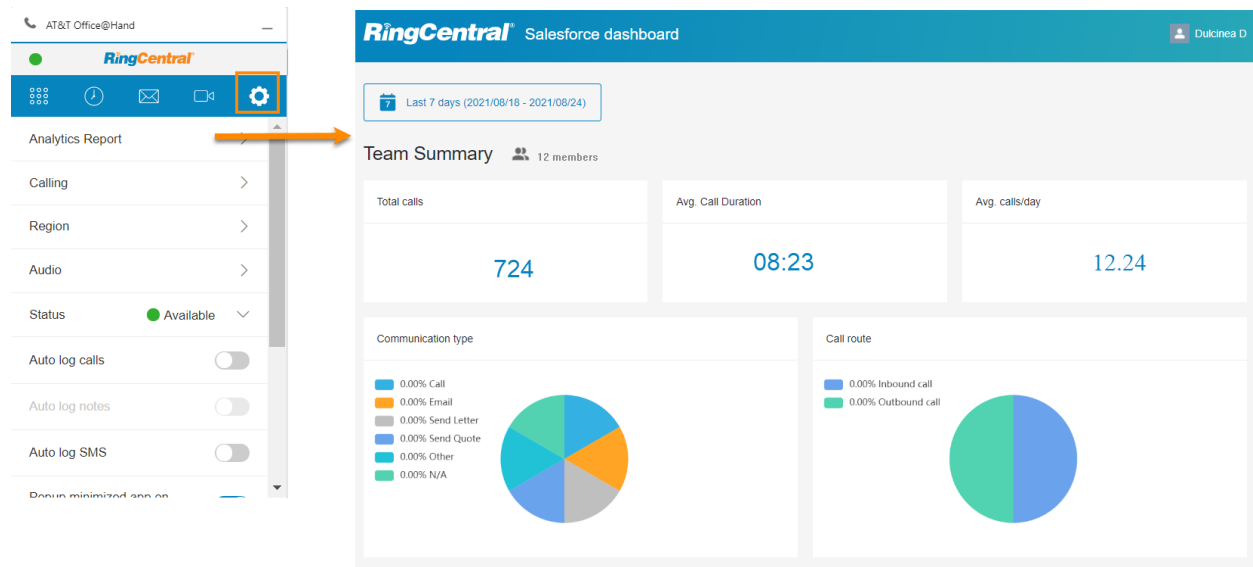
Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
<input type="checkbox"/> Edit	User, Integration	integ	integration@00d5g0000096tveaa.com			<input checked="" type="checkbox"/>	Analytics Cloud Integration User	
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chattv.00d5g00000096tveaa.i2e6hsby0zwn@chatter.salesforce.com			<input checked="" type="checkbox"/>	Chatter Free User	
<input type="checkbox"/> Edit	User, Security	sec	insightssecurity@00d5g00000096tveaa.com			<input checked="" type="checkbox"/>	Analytics Cloud Security User	
<input type="checkbox"/> Edit	D. Dulcinea	dulcinea		8/24/2021, 6:04 AM	Manager	<input checked="" type="checkbox"/>	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

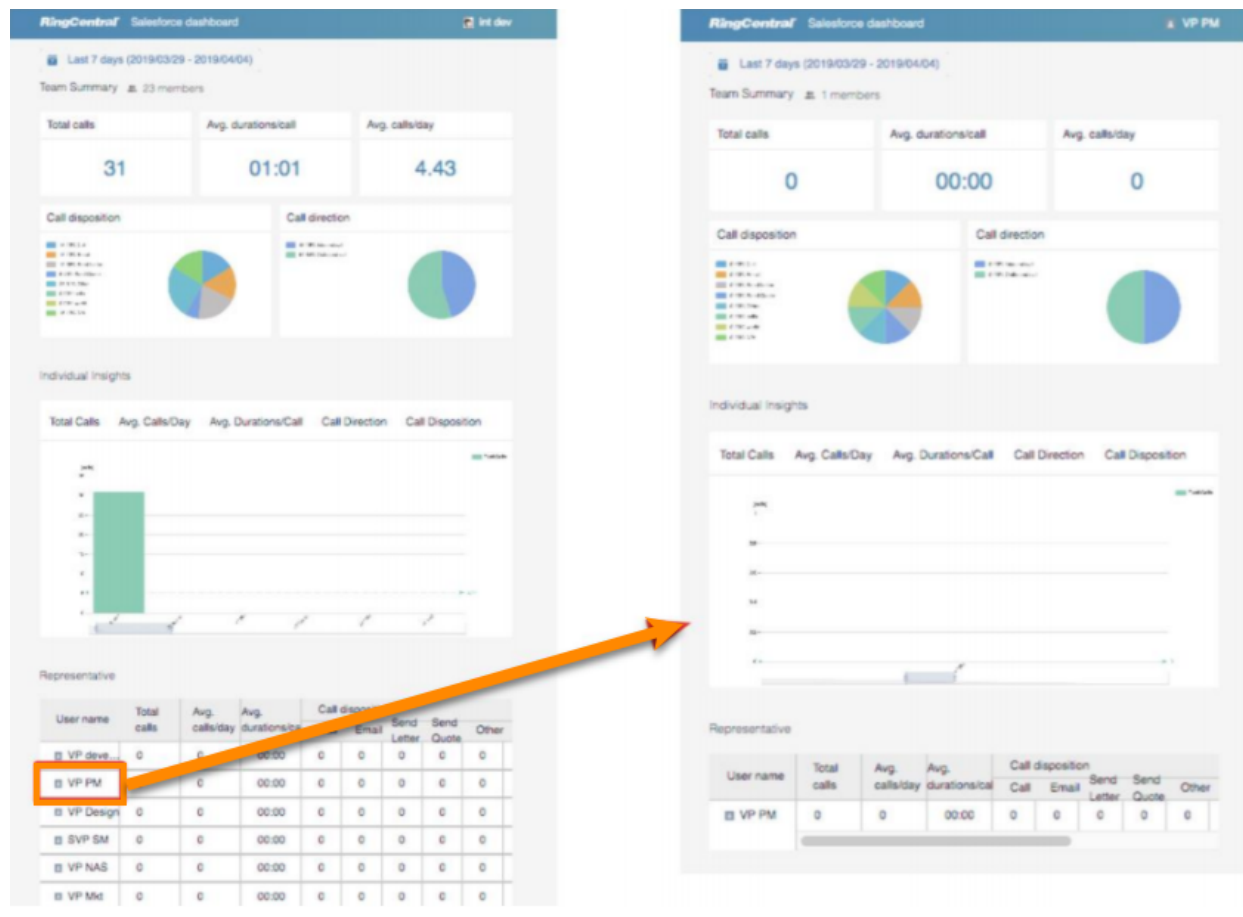
Analytics Report is available under the **Settings** menu. If you have not set up the role hierarchy, it only shows your individual data for the signed-in account. If role hierarchy is enabled, it shows the data for all the team members.



Team view vs. Individual view

You can see all the members under your role based on the Salesforce roles hierarchy. When you click on 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.

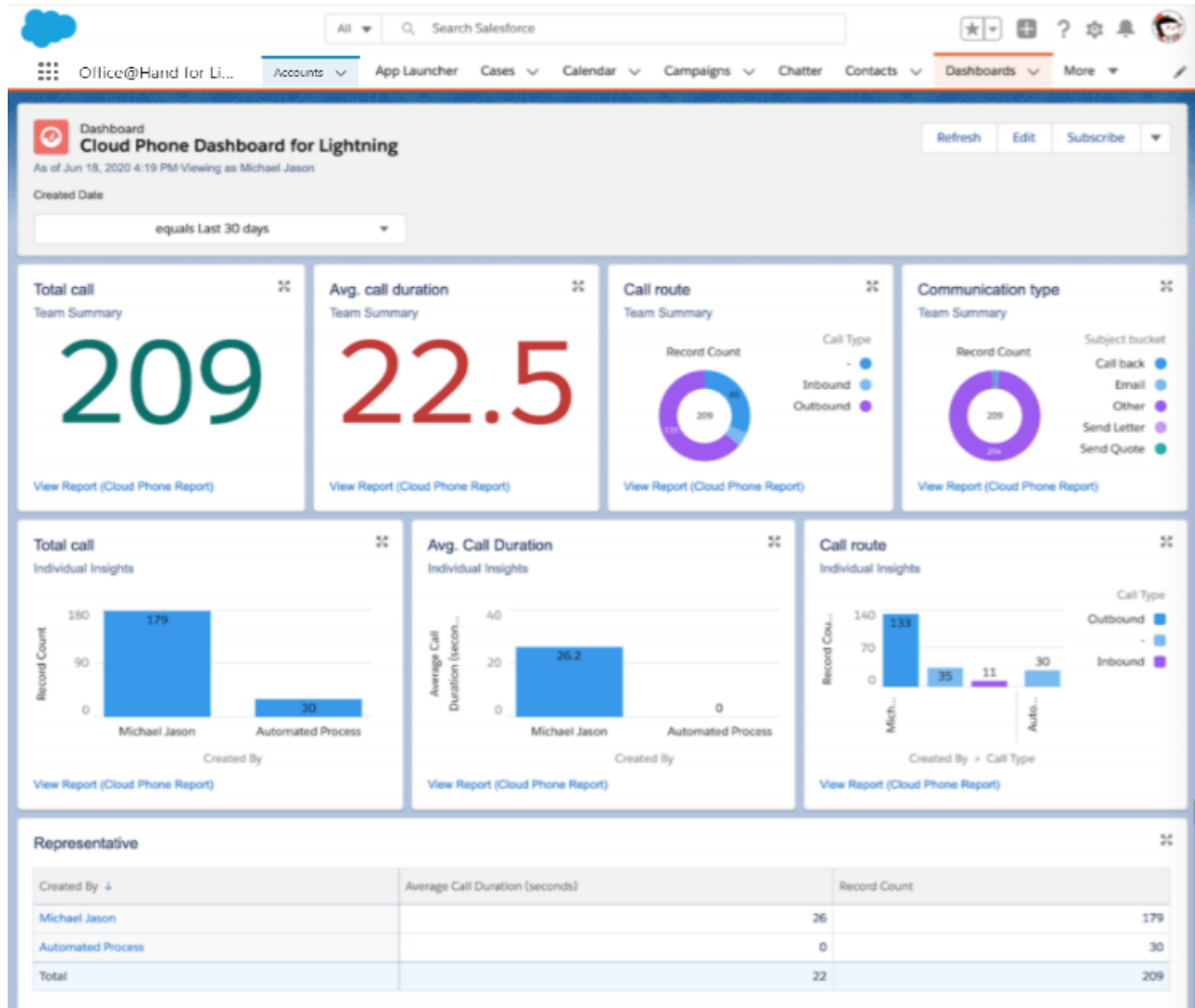
Availability: Supported both in Salesforce Classic and Lightning Experience. The Cloud Phone Report will be available from Salesforce Dashboard.

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.

The screenshot shows the Salesforce Reports interface. The top navigation bar includes 'Office@Hand for Li...', 'Accounts', 'App Launcher', 'Calendar', 'Campaigns', 'Cases', 'Chatter', 'Contacts', 'Reports', and 'More'. The 'Reports' dropdown menu is open, showing 'Recent records' with 'Cloud Phone Report' highlighted. Below the menu, the 'Recent' reports list is displayed with columns: Report Name, Description, Folder, Created By, and Created On. The list includes 'Cloud Phone Report', 'My SMS Today', and 'My Calls Today'.

REPORTS	Report Name	Description	Folder	Created By	Created On
Recent	Cloud Phone Report		Cloud Phone Report	Dulcinea D	8/11/2021, 4:33 PM
Created by Me	My SMS Today		Cloud Phone Report	Dulcinea D	8/11/2021, 4:33 PM
Private Reports	My Calls Today		Cloud Phone Report	Dulcinea D	8/11/2021, 4:33 PM
Public Reports					
All Reports					
FOLDERS					

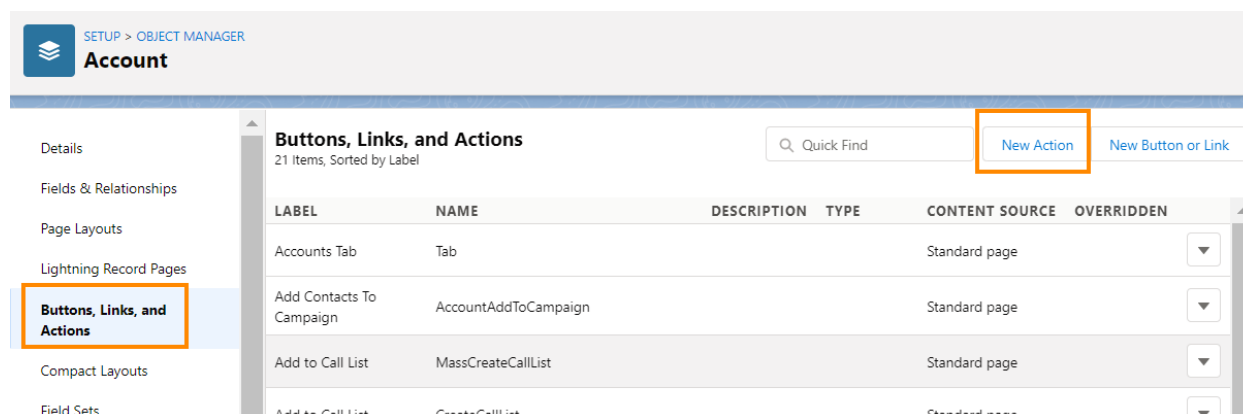
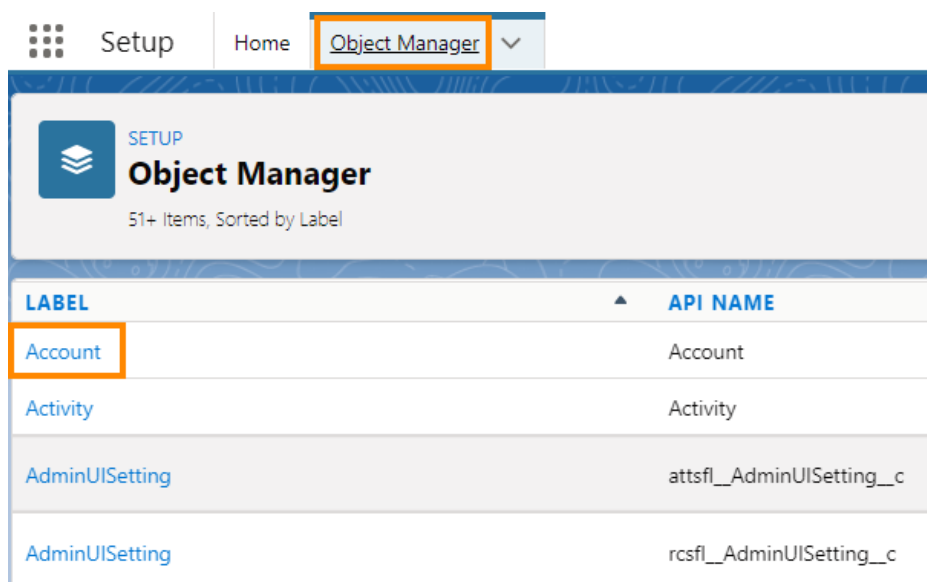


Adding Office@Hand Call and SMS options to Salesforce mobile app

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**.

Account Actions


New Action

Enter Action Information


Save

Cancel


Object Name


Account 

Action Type


Custom Visualforce 

Visualforce Page


Phone Numbers Account [attsfl__Phone_Numbers_Account] 




Height

250px 

Standard Label Type


--None-- 




Label

Call with Office@Hand


Name

Call_with_Office_Hand 

Description



Icon

 [Change Icon](#)

Save

Cancel


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**.

Account Actions


New Action

Enter Action Information Save Cancel


Object Name


Account 

Action Type


Custom Visualforce 

Visualforce Page


Phone Numbers SMS Account [rcsfl__Phone_Numbers_SMS_Account] 




Height

250px 

Standard Label Type


--None-- 




Label

SMS with Office@Hand


Name

SMS_with_Office_Hand 

Description



Icon

 [Change Icon](#)

Save Cancel

Adding Actions to Salesforce mobile app

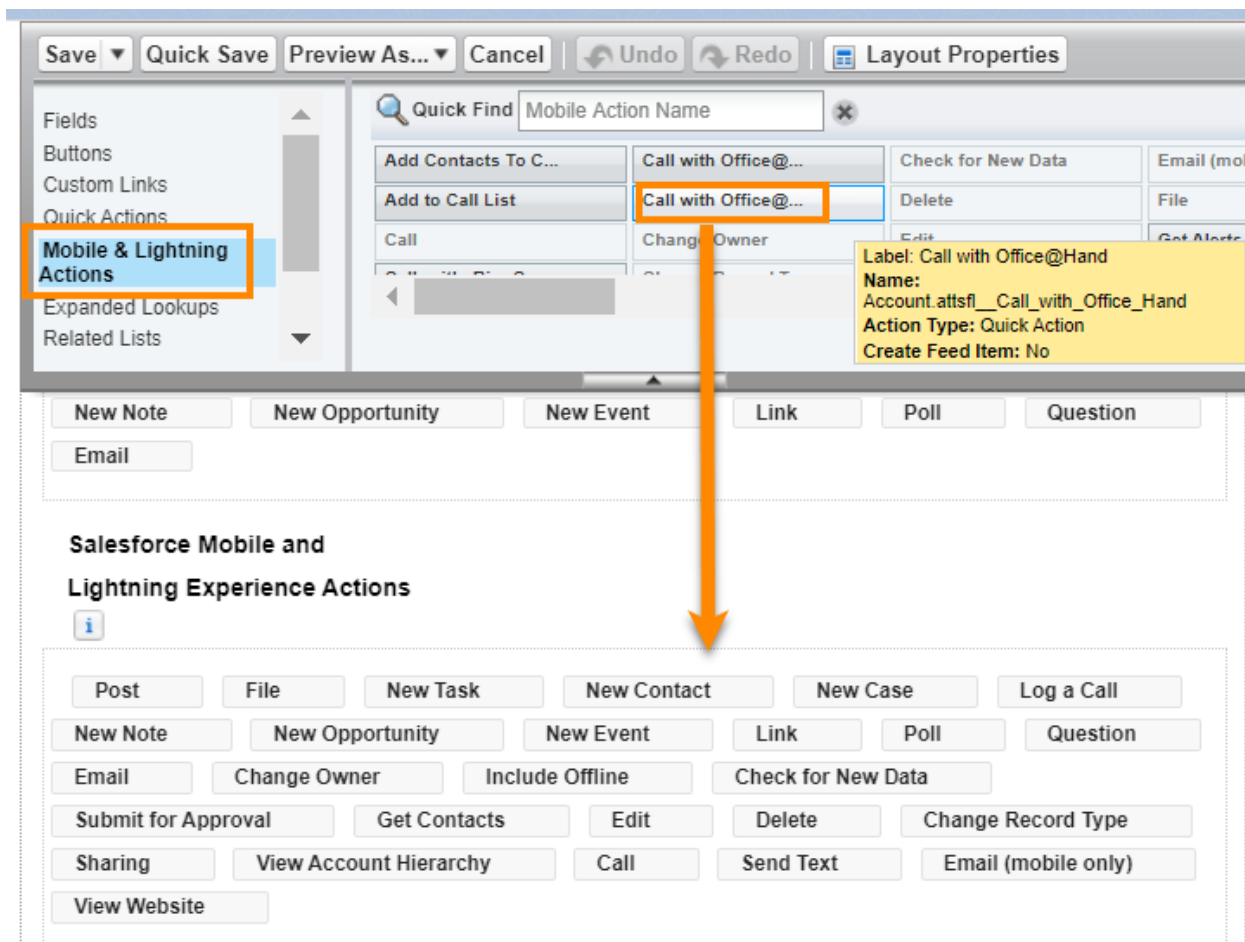
Navigate to **Setup Home > Object Manager > Account**, then click > **Page Layouts**. Click *Edit* at the far right of the **Page Layout** you want to change.

The screenshot shows the Salesforce Admin console interface. At the top, there are tabs for Setup, Home, and Object Manager. Below the tabs, the breadcrumb trail is 'SETUP > OBJECT MANAGER' and the object is 'Account'. The left sidebar contains a list of options: Details, Fields & Relationships, Page Layouts (highlighted with an orange box), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Page Layouts' and shows '4 Items, Sorted by Page Layout Name'. There is a 'Quick Find' search bar and buttons for 'New' and 'Page Layout Assignment'. A table lists the page layouts:

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Account (Marketing) Layout	Dulcinea D, 8/5/2021, 1:09 PM	Dulcinea D, 8/5/2021, 1:09 PM	▼
Account (Sales) Layout	Dulcinea D, 8/5/2021, 1:09 PM	Dulcinea D, 8/5/2021, 1:09 PM	▼
Account (Support) Layout	Dulcinea D, 8/5/2021, 1:09 PM	Dulcinea D, 8/5/2021, 1:09 PM	▼
Account Layout	Dulcinea D, 8/5/2021, 1:09 PM	Dulcinea D, 8/5/2021, 1:09 PM	▼

The 'Account Layout' row is highlighted, and its dropdown menu is open, showing 'Edit' and 'Delete' options. The 'Edit' option is highlighted with an orange box.

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**.

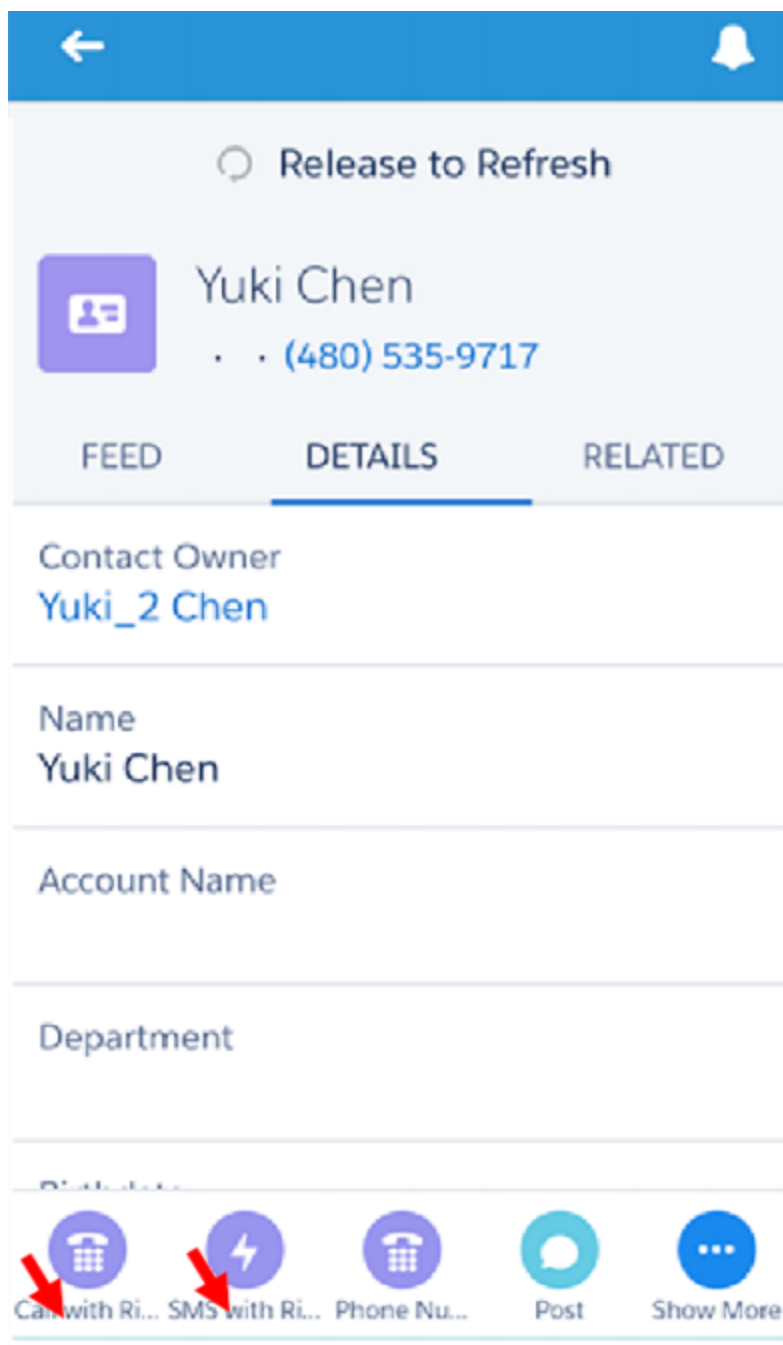


The screenshot displays the Salesforce Lightning mobile app configuration interface. At the top, there is a toolbar with buttons: Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below the toolbar is a 'Quick Find' search bar with the text 'Mobile Action Name'. A table of actions is displayed, with 'SMS with Office@Hand' highlighted. A tooltip for this action shows the following details:

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

Below the table, there is a section titled 'Salesforce Mobile and Lightning Experience Actions' with an information icon. This section contains a grid of buttons for various mobile actions, including '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)', and 'View Website'. An orange arrow points from the 'SMS with Office@Hand' action in the 'Quick Find' table to the 'New Contact' button in the 'Salesforce Mobile and Lightning Experience Actions' section.

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**.

High Velocity Sales (HVS) Settings

☒ Enable HVS Mode (Supported only in Lightning Experience)

Select a custom field for HVS Disposition

HVS Disposition (Default)

☒ Mark HVS Disposition as a required field ⓘ

☐ Redirect incoming calls to Voicemail ⓘ

Modify your HVS Disposition value in the [Object Manager](#) ⓘ

Configure your HVS call result matching in [High Velocity Sales Settings](#)

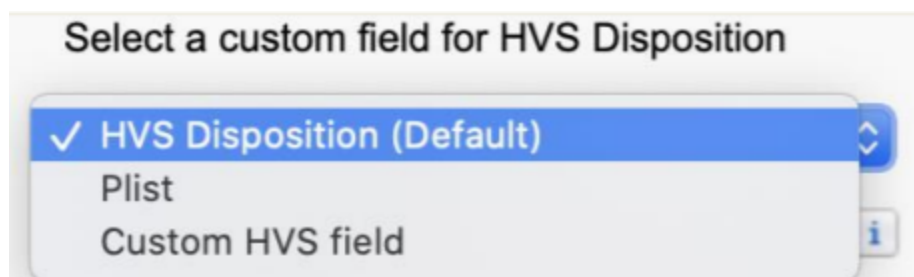
Save

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.

Log Customization

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

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

Marking HVS Disposition as a required field

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

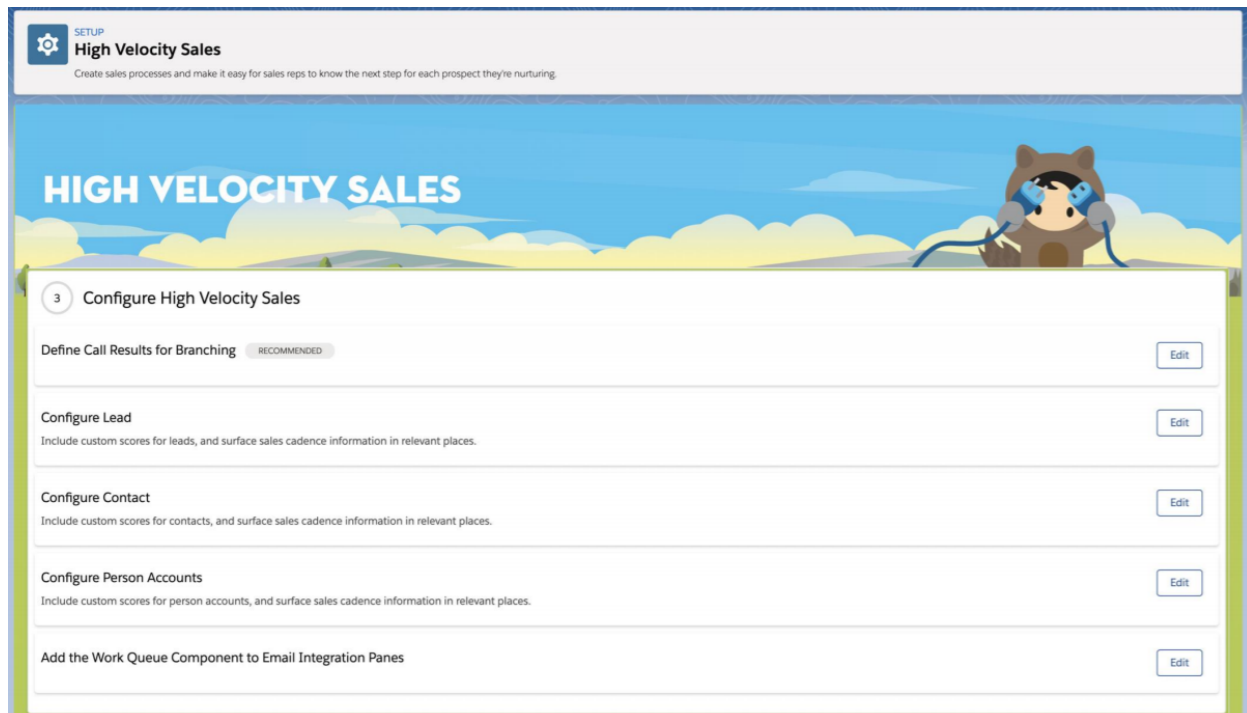
You can find the HVS Disposition field in the Activity or Task Objects in the Object Manager. If present in Activity, click **Activity > Fields & Relationships > HVS Disposition**. If you have selected a custom field to log the HVS call outcome, you will see the custom field under **Fields & Relationships**.

The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. Below this, the breadcrumb trail reads 'SETUP > OBJECT MANAGER' followed by the 'Activity' object name. On the left sidebar, the 'Fields & Relationships' tab is selected. The main content area displays a table of fields for the 'Activity' object, sorted by field label. The table has columns for field name, API name, data type, and a dropdown menu. The 'HVS Disposition' field is highlighted in the list.

Field Name	API Name	Data Type	Field Type
CALL_UUID	rcsfl__CALL_UUID__c	Text(255) (External ID)	✓
CALL_UUID	attsfl__CALL_UUID__c	Text(255) (External ID)	✓
external_whoid	rcsfl__external_whoid__c	Text(255)	
external_whoid	attsfl__external_whoid__c	Text(255)	
HVS Disposition	rcsfl__hvs_disposition__c	Picklist	
HVS Disposition	attsfl__hvs_disposition__c	Picklist	

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.

The screenshot shows the Salesforce Page Layout Editor interface. At the top, there are buttons for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below these is a 'Fields' sidebar on the left with categories like Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. The main area shows a 'Quick Find' search bar and a list of fields. The 'Do Not Call' field is highlighted with an orange box. A yellow tooltip points to it, stating 'Label: Do Not Call' and 'Type: Checkbox'. An orange arrow points from this field down to the 'Contact Information' section of a sample contact record below. The record shows fields like Contact Owner, Name, Account Name, Title, Department, Birthdate, Reports To, Lead Source, Phone, Home Phone, Mobile, Other Phone, Fax, Email, Assistant, and Asst. Phone.

Contact Information (Header visible on edit only)			
Contact Owner	Sample Text	Phone	1-415-555-1212
Name	Sarah Sample	Home Phone	1-415-555-1212
Account Name	Sample Text	Mobile	1-415-555-1212
Title	Sample Text	Other Phone	1-415-555-1212
Department	Sample Text	Fax	1-415-555-1212
Birthdate	8/24/2021	Email	sarah.sample@company.com
Reports To	Sample Text	Assistant	Sample Text
Lead Source	Sample Text	Asst. Phone	1-415-555-1212

Address Information (Header visible on edit only)			
---	--	--	--


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


Do Not Call (DNC) settings

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


☐ Turn On DNC settings while calling or messaging


Call settings

☐ Restrict calls for DNC records 

☒ Override and call DNC records 

SMS settings

☐ Restrict SMS for DNC records 

☒ Override and SMS DNC records 

Save


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


Do Not Call (DNC) settings

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


☒ Turn On DNC settings while calling or messaging


Call settings

☒ Restrict calls for DNC records 

☐ Override and call DNC records 

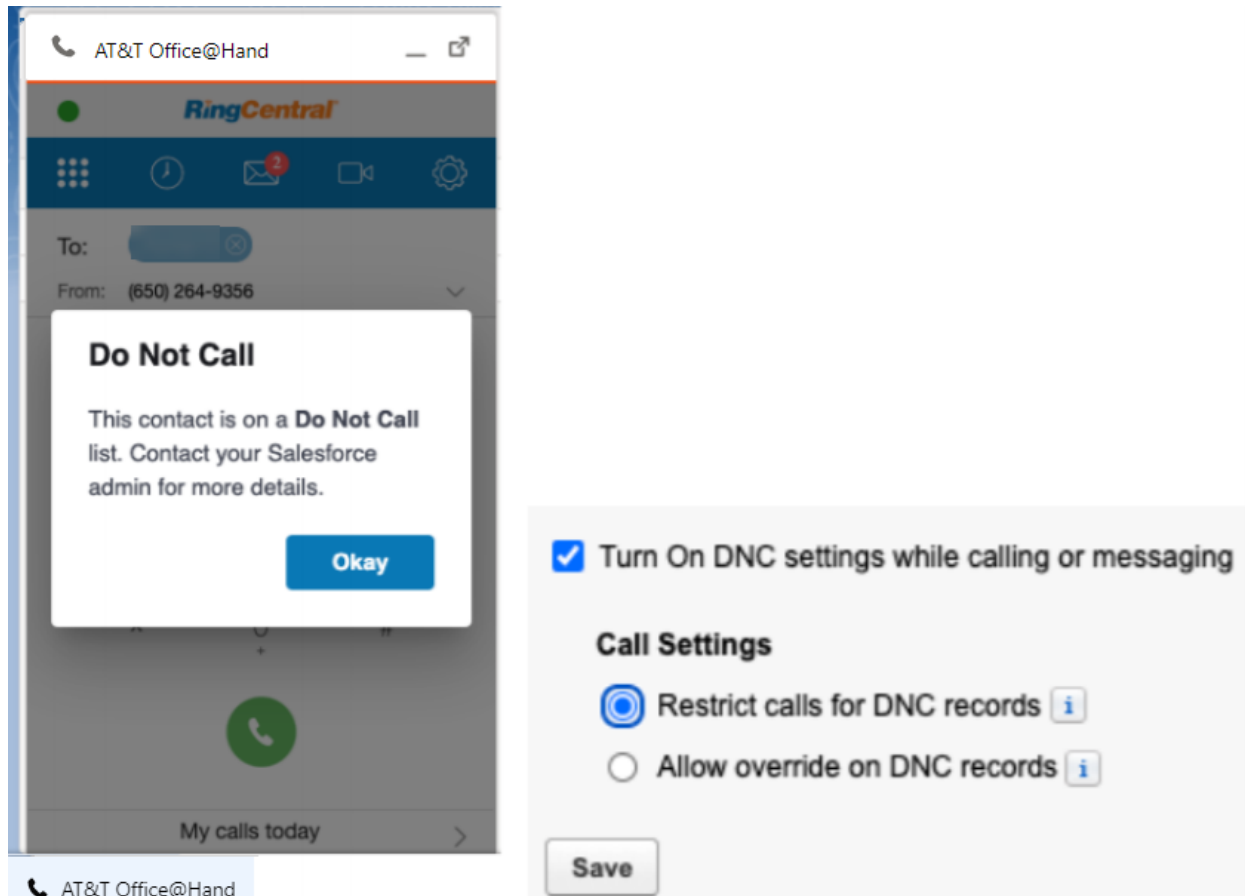
SMS settings

☒ Restrict SMS for DNC records 

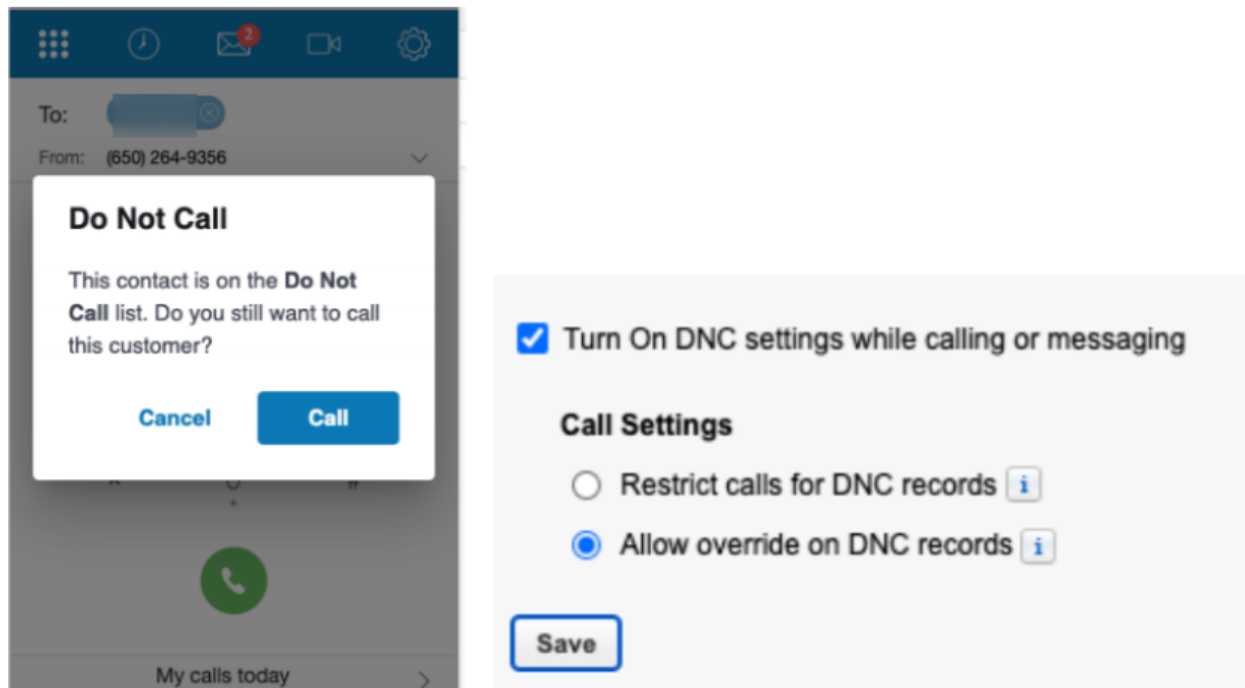
☐ Override and SMS DNC records 

Save

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

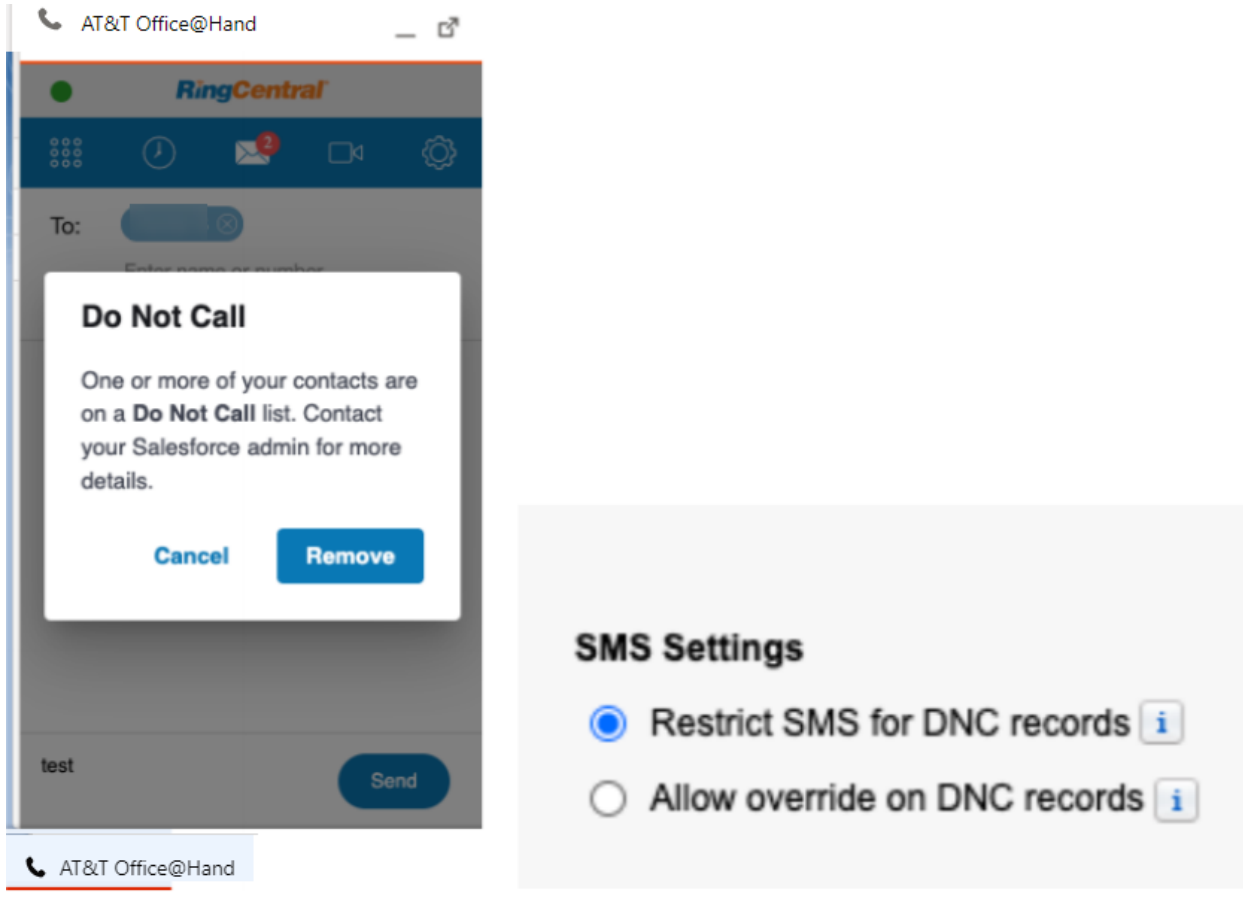


- b. **Override and call DNC records:** In this mode, when the end user is trying to make calls to DNC records with Office@Hand for Salesforce, they will be notified that this is a DNC record, but the end user will still be given the capability to override and make calls.

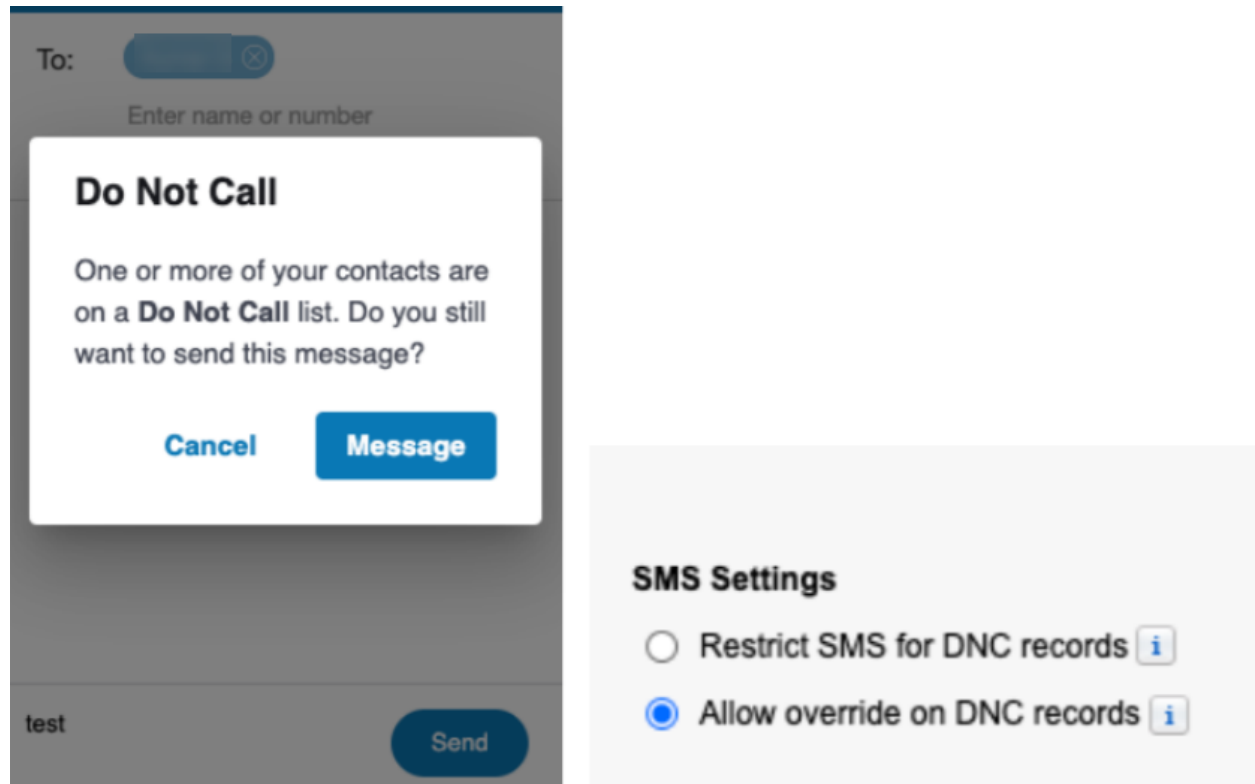


6. The DNC SMS settings

- 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?

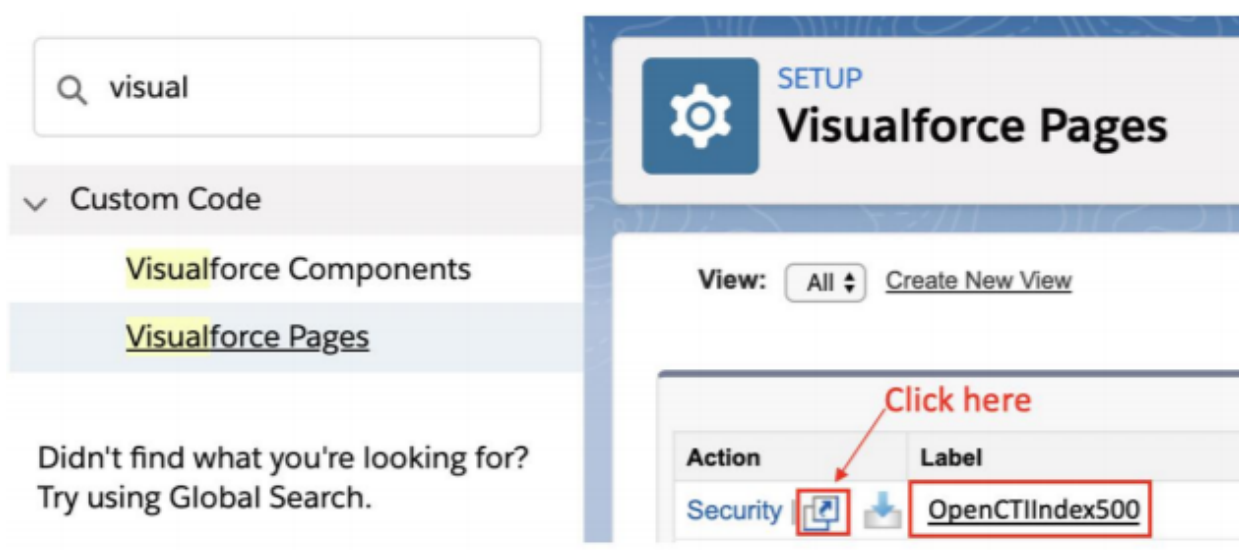
A: First, navigate to **App Setup > Call Center > Customize Call Centers** and verify that the CTI Adapter URL is pointing at /apex/Office@Hand.OpenCTIIndex#/

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.

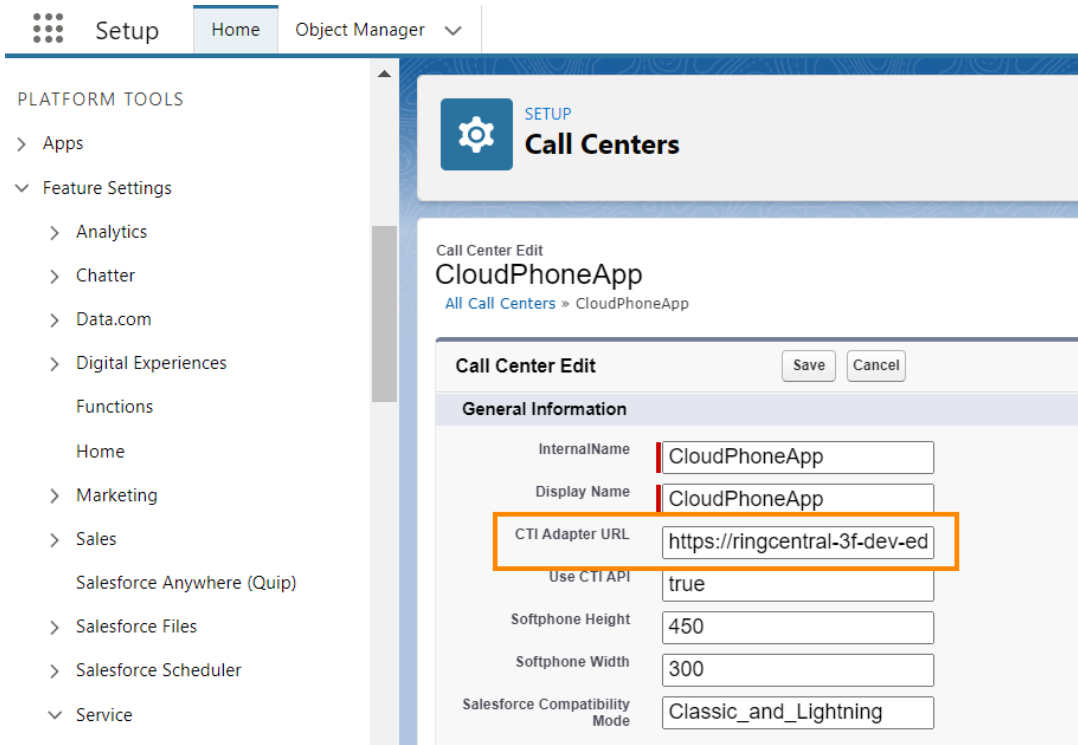
A: You can roll back to the previous 5.x version by following the steps below.

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



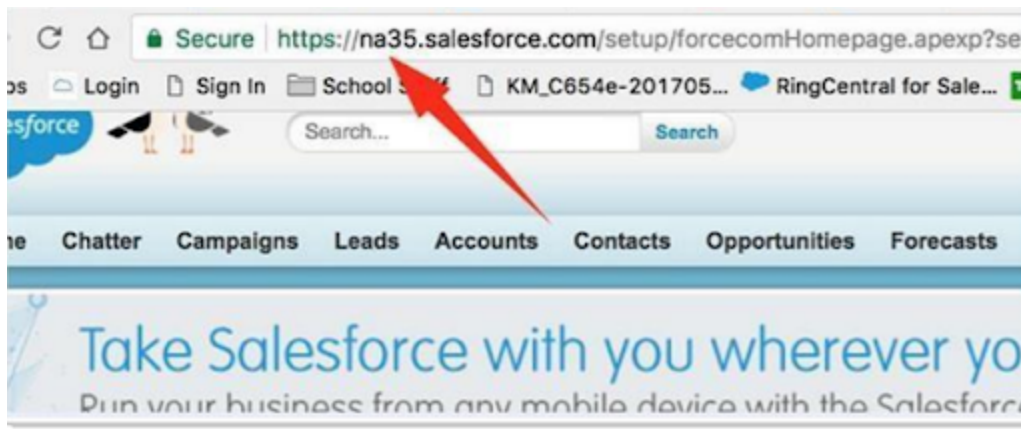
2. After the page opens in a new tab or window, copy its URL. For example, the full URL is: <https://c.na78.visual.force.com/apex/OpenCTIIndex500#/login>. Copy the following part of the URL: <https://c.na78.visual.force.com/apex/OpenCTIIndex500>.
3. Close the tab and return to **Setup Home > Call Centers**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

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



The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with 'Setup' selected. The main content area is titled 'Call Centers' and shows the 'Call Center Edit' form for 'CloudPhoneApp'. The 'CTI Adapter URL' field is highlighted with an orange box and contains the value 'https://ringcentral-3f-dev-ed'. Other fields include 'Internal Name' (CloudPhoneApp), 'Display Name' (CloudPhoneApp), 'Use CTI API' (true), 'Softphone Height' (450), 'Softphone Width' (300), and 'Salesforce Compatibility Mode' (Classic_and_Lightning).

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>
```

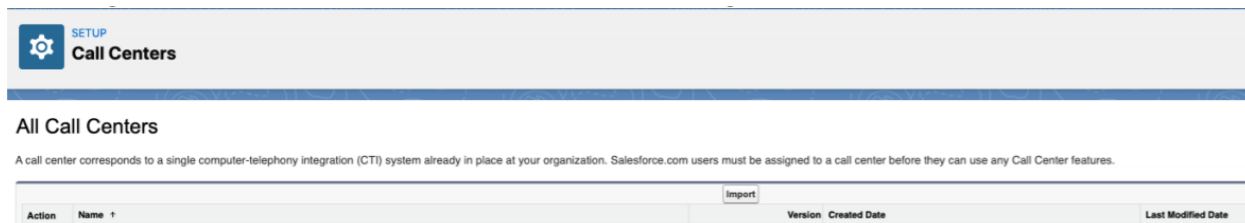
```
<section sortOrder="0" name="reqGeneralInfo" label="General Info">
  <item sortOrder="0" name="reqInternalName"
    label="Internal Name">cloudphoneappbyfile</item>
  <item sortOrder="1" name="reqDisplayName"
    label="Display Name">Cloud Phone App Create By File Import</item>
  <item sortOrder="2" 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.