

AT&T Office@Hand for Salesforce

User Guide



RingCentral

CONTENTS

| | |
|--|-----------|
| Introduction | 4 |
| About Office@Hand for Salesforce | 4 |
| About this Guide | 4 |
| System requirements | 4 |
| Salesforce edition | 4 |
| Other system requirements | 4 |
| Basics | 6 |
| Options | 7 |
| Login | 10 |
| Placing Calls | 11 |
| Placing an international call vs. a local call | 13 |
| Incoming Calls | 14 |
| Related Search | 16 |
| Logging calls | 17 |
| Offline logging and editing | 18 |
| Selecting matched contact | 19 |
| Organizing Meetings from Office@Hand Salesforce Integration | 21 |
| Call recording | 22 |
| Compose text | 23 |
| Messages | 24 |
| Auto Log | 25 |
| Auto log calls | 25 |
| Auto log notes | 25 |
| Trigger timing | 25 |
| Activity Report | 26 |
| Analytics Report | 27 |
| Entry for Analytics Report | 27 |
| The Overview of the Analytics Report | 28 |
| Time Selection | 29 |
| The Overall KPIs | 30 |
| The Bar Chart | 32 |
| The Table | 34 |
| Cloud Phone Report (beta) | 35 |
| Limitations | 36 |

| | |
|--|-----------|
| Calling and sending SMS with Office@Hand from Salesforce mobile app | 37 |
| Placing a Call | 39 |
| Call logging | 41 |
| When Auto Log Calls setting is enabled | 41 |
| When Auto Log Calls setting is disabled | 42 |
| Custom field | 42 |
| Troubleshooting | 44 |

Introduction

About Office@Hand for Salesforce

Office@Hand for Salesforce provides seamless integration between Salesforce.com and your Office@Hand services to enable improved customer retention, greater agent productivity, and advanced business processes.

It offers these features:

- No software to install: Works entirely in the cloud with any Office@Hand device
- Works on any computer, any browser: Access anytime on any PC or Mac
- Works with any Salesforce Cloud: Sales Cloud, Service Cloud, Marketing Cloud
- Full call history for concurrent and historical calls
- Active call control during the phone call
- Call log notification
- Easy click-to-dial by clicking on any phone number in Salesforce
- Instant screen pop displaying the caller's information as soon as a call arrives
- New browser tab for every call enabling multiple interactions at once
- Automatic call dispositions for quick call logging
- Accurate call logs saved to the corresponding record
- New records: Accounts, contacts, and leads can be easily created while on call

About this Guide

This guide is specifically designed for end users of Office@Hand for Salesforce. This guide is not intended for system/network administrators. It does not provide any information on how to set up the application on user desktops or how to configure the Salesforce.com instance to be able to use this application. This user guide will show you how to use this application and provide known issues/limitations and basic troubleshooting questions and answers.

System requirements

Below you'll find the recommended system requirement specifications.

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+ / IE Edge 38 / Firefox 52+ / Chrome 56+ / Safari 6.0.5+ (Classic only)
- RingCentral Softphone
- .Net Framework 3.5
- 10 digit phone system

Basics

For optimal user experience, ensure that:

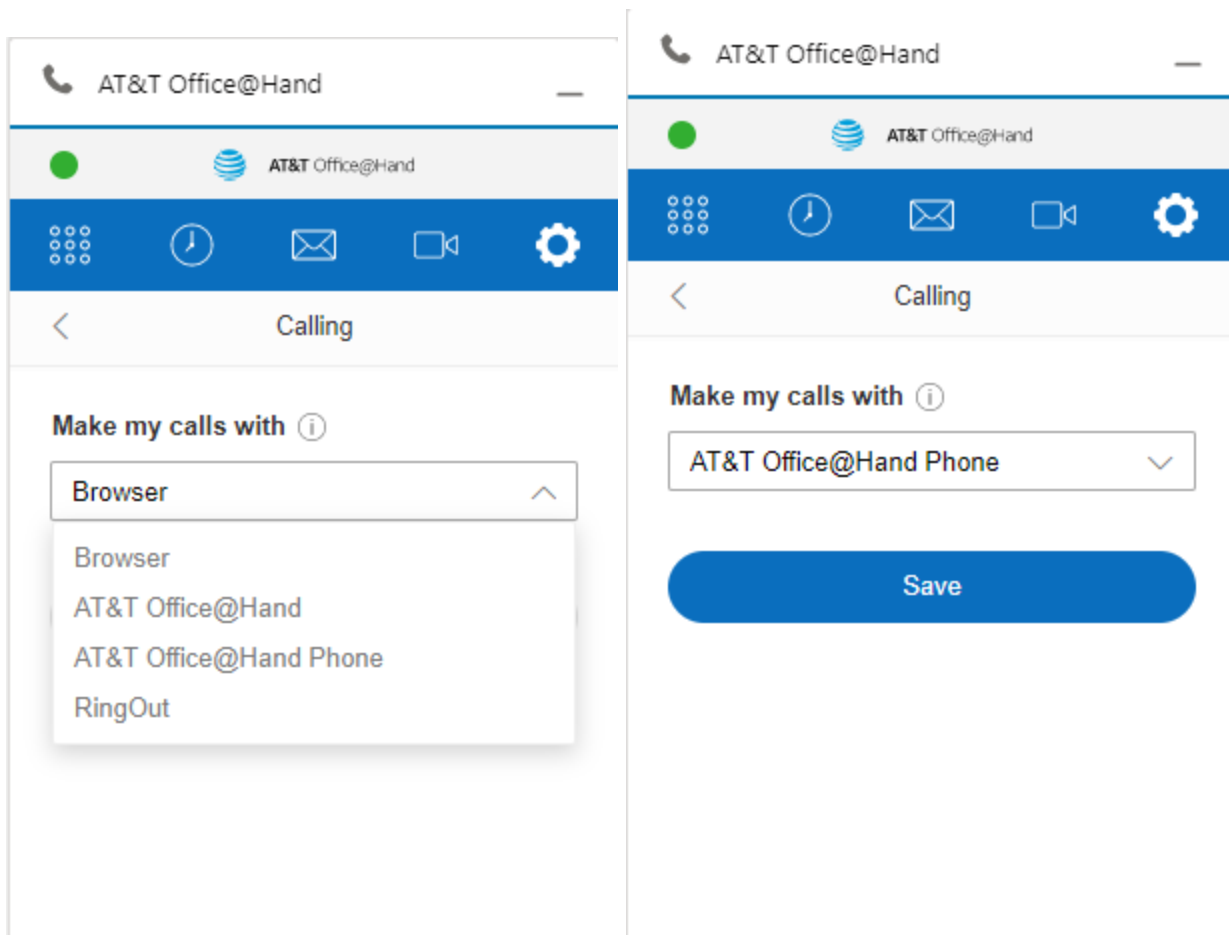
- The browser you are using is updated to the latest version.
- If you are using Safari as your browser, do the following steps to avoid issues while logging into Office@Hand for Salesforce. From the main menu, click on **Safari > Preferences > Privacy**, then uncheck **Prevent cross-site tracking**.
- You have set the correct number as your Office@Hand Direct Number. You will be making and receiving calls from this number through the Salesforce.com interface. You can find your Office@Hand Direct Number in the Office@Hand Service Portal at **My Settings > Phones and Numbers > Direct Numbers**.
- You're logged in to Salesforce.com through the browser. The app will work only while the user is logged in to Salesforce.com.
- You're logged in to Office@Hand for Salesforce through Salesforce.com. Use your Office@Hand Direct Number for the user name and your Office@Hand password.
- Your browser has its pop-up blocker disabled for the Salesforce.com site.

Options

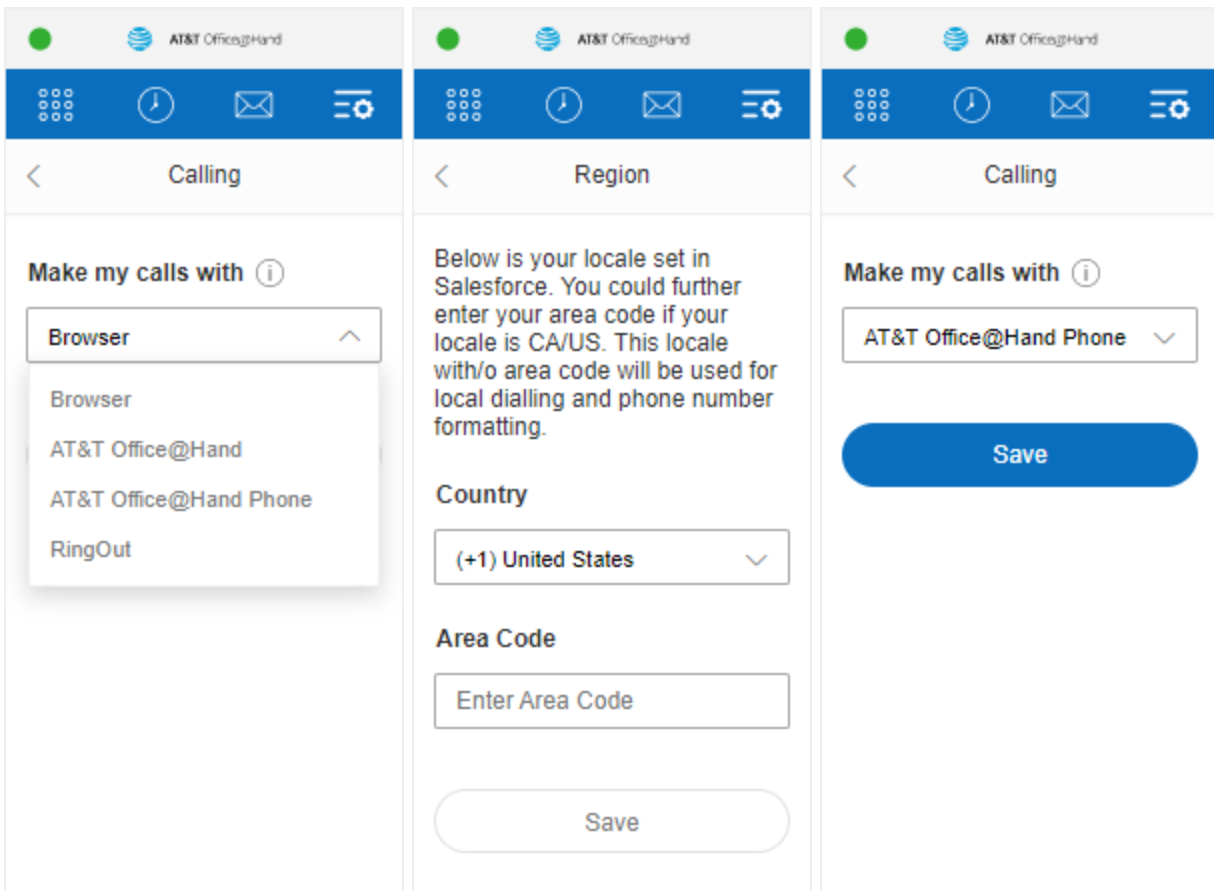
You can get to these options by clicking on the gear icon in the top navigation bar.

- **Calling (outbound calling option)**
 - *Call with Softphone:* The Office@Hand Phone app or Office@Hand desktop app will initiate the call when you make an outgoing call.
 - *Connect from a different phone:* When you select this option, you'll be asked to enter a phone number. When you make an outbound call, Office@Hand will ring you at the phone number you entered before connecting the called party.
 - *Press 1 to start a call:* When you make an outgoing call, Office@Hand will first call you at your Office@Hand Direct Number. Once you answer the call, you will have an option to press 1 before the call is connected to the other party. If this option is not enabled, Office@Hand will call your number and the dialed number simultaneously.
- **Region:** Select the country you are physically located in. This country code will be used for local dialing. If you select US/CA as your country, you will need to specify an area code further before you could dial a 7-digit local phone number.
- **Status:** User can set up their status here, including Available, Busy, Do Not Disturb, and Invisible.
- **Accept call queue calls:** When this option is selected, the call queue configuration set up in the online account can be applied here.
- **Auto log calls:** When this option is selected, Office@Hand will automatically create a call log in the Activity History for any inbound or outbound call. If this option is not selected, a call log will only be created if you press the Create Log button in the logging area during or after the call.
- **Auto log notes:** When this option is selected, the incoming calls' customized fields data will be logged automatically. The admin account can set the customized fields via the **AdminUI**.
- **Auto log SMS:** When this option is selected, Office@Hand will automatically create a call log in the Activity History for SMS conversations. The SMS exchanged with the same contact/lead/opportunity within the same day will be saved within one log. If this option is not selected, an SMS log will only be created if you click **Save** when viewing the SMS conversation.

Settings (Office@Hand for Salesforce Lightning)

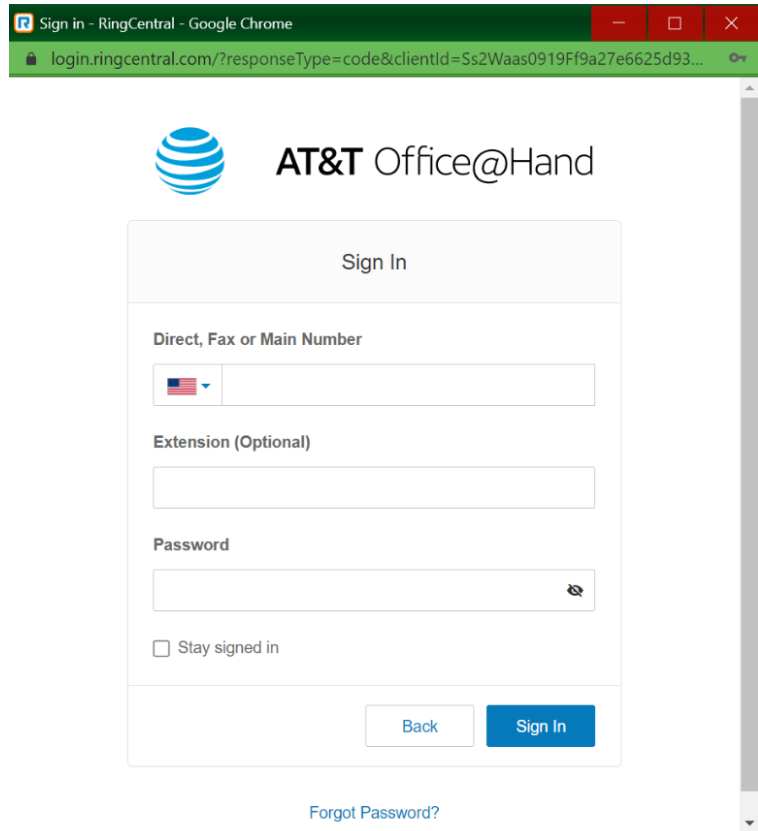
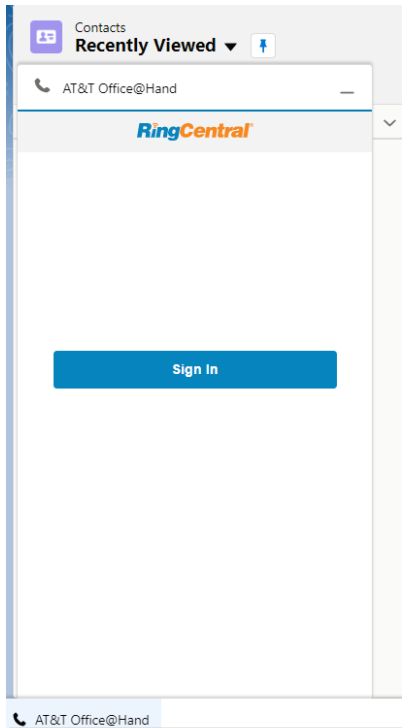


Settings (Office@Hand for Salesforce Classic)



Login

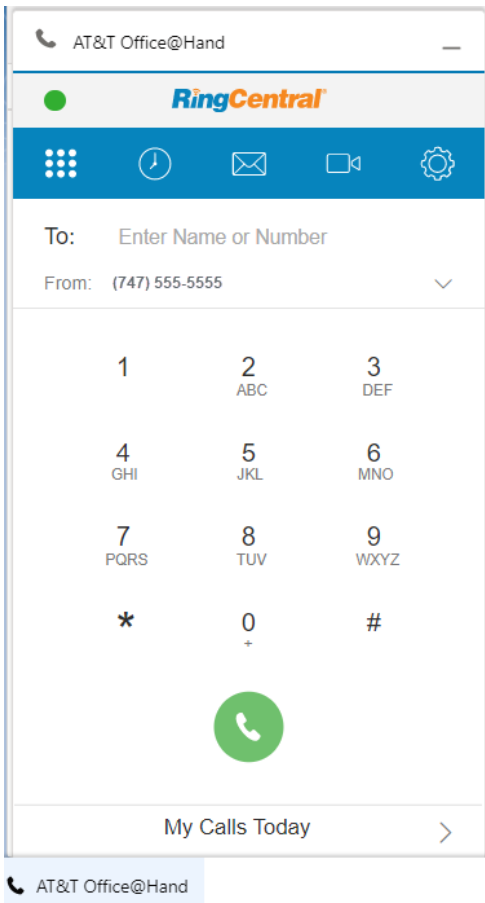
Open your browser and log in to your Salesforce account. If this is the first time you are using Office@Hand for Salesforce, you will see a form allowing you to log in to your Office@Hand account. Click **Sign In** type in your Office@Hand Direct Number and your Office@Hand account password on the pop-up window.



Placing Calls

There are two ways you can make an outgoing call:

- Type in the number you want to dial in the dial pad



- Use the click-to-dial feature (from the list of Accounts)

| Account Name | Phone |
|---|--|
| United Oil & Gas Corp. | (408) 555-3868 |
| Express Logistics and Transport | (408) 555-4882 |
| Edge Communications | (512) 555-6000 |
| GenePoint | (408) 555-4882 |
| Edge Communications | (408) 555-4882 |
| Grand Hotels & Resorts Ltd | (312) 555-1000 |

If you choose to *Call with Softphone*, your Office@hand desktop app will be initiated to place the call. If you select to *Connect from a different phone*, Office@hand will first call you at your specified number, and the app dialer will change to the screen shown below when the call is being connected.

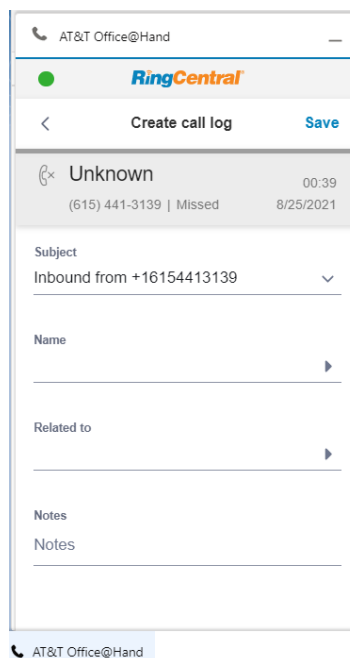
Once you answer the call, depending on your settings, you may be prompted to press 1 before the call is connected to the other party. If the call cannot be completed, the **Call could not be completed** message will be displayed.

Once you have picked up the call and it starts ringing the other party, the screen will get updated to the following display. If the call is connected successfully, the Office@Hand for Salesforce display will show a call timer and an area to take call notes.

If you have set Office@Hand for Salesforce to auto log calls, a call log will automatically be saved to Salesforce.com, and it will be updated whenever you type notes or change the related objects. If you have not set it to auto-log calls, the log will only be created or updated when you press the **Save** button.

You are free to hang up the phone through which you speak to the called party and continue editing the **Comments** and the **Subject** for the call log entry. Once the call has ended, the timer will stop, and the call log will move to the Last Call area, where you can continue editing it.

For call actions such as transfer, hold, and mute, use the controls available on the device you answered the call.



Placing an international call vs. a local call

If you wish to place an international call (i.e., to a destination outside of your home country), you must ensure that the number is properly formatted. If you wish to click-to-dial an international number, first ensure that the country code is part of the phone number, like this:



Please check the locale set in your Salesforce user profile, and save local phone numbers with your records in the format without the +country code. For example, if your locale is US/CA in Salesforce, please don't save US/CA phone numbers with +1. The Office@Hand for Salesforce app will append country code following your locale when you click to dial a local phone number. The app will remove the country code for inbound calls before searching the matching records in Salesforce for your call.

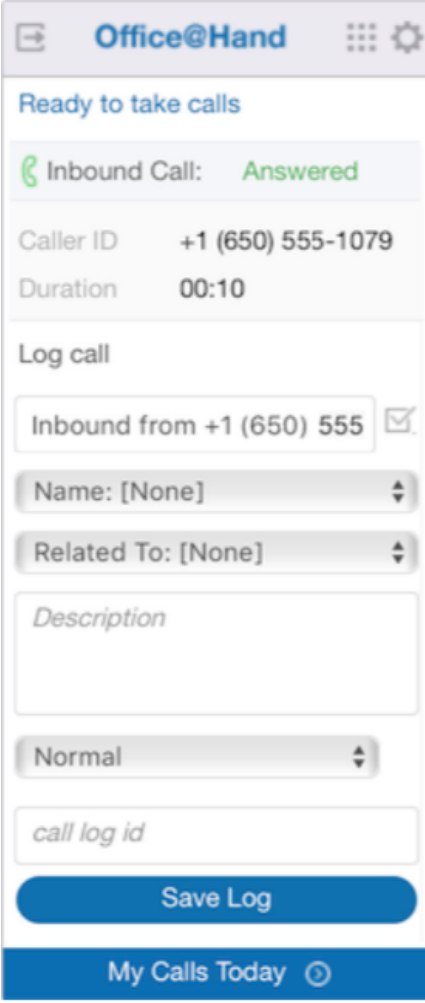
You can set your region in the app, and when you enter a local number on the dialer in the app, the app will append the country code to the local number you dialed, following your region setting in the app.

Incoming Calls

When an incoming call is received, you are notified about the incoming call on your Office@Hand for Salesforce. The background color will change according to status. For example, a ringing call will show a green background color.

In addition to the app notification, other phones will ring depending on the configuration of your Office@Hand phone system. Once you pick up the call on your device/desk phone, the call timer will start, and the layout will change to give you the option to log the call. If the call goes directly to voicemail without ringing any of your Office@Hand phones, then there will not be any notification to your Office@Hand for Salesforce.

You have the choice of logging incoming calls, independent of the actions you take on your phone (e.g., accept the call, reject the call, put the caller on hold, hang up the call). Such actions you take will not impact the call logging experience in Salesforce.



The screenshot displays the Office@Hand mobile application interface. At the top, the app name "Office@Hand" is visible. Below the header, the status "Ready to take calls" is shown. A notification for an "Inbound Call: Answered" is displayed with a green background. The call details include "Caller ID: +1 (650) 555-1079" and "Duration: 00:10". A "Log call" section contains a text input field with "Inbound from +1 (650) 555" and a checkmark icon. Below this are dropdown menus for "Name: [None]" and "Related To: [None]". A "Description" text area is present, followed by a "Normal" dropdown menu. At the bottom of the form is a "call log id" text field. A blue "Save Log" button is located below the form, and a blue bar at the very bottom contains the text "My Calls Today" with a circular refresh icon.

With the latest version of Office@Hand for Salesforce, you now have call control capabilities to End, Mute, Transfer, and Hold calls at the bottom of the call log screen. To save the log as related activity, select the appropriate Salesforce entity and after fulfilling the required call log information, click the **Save** button.

Related Search

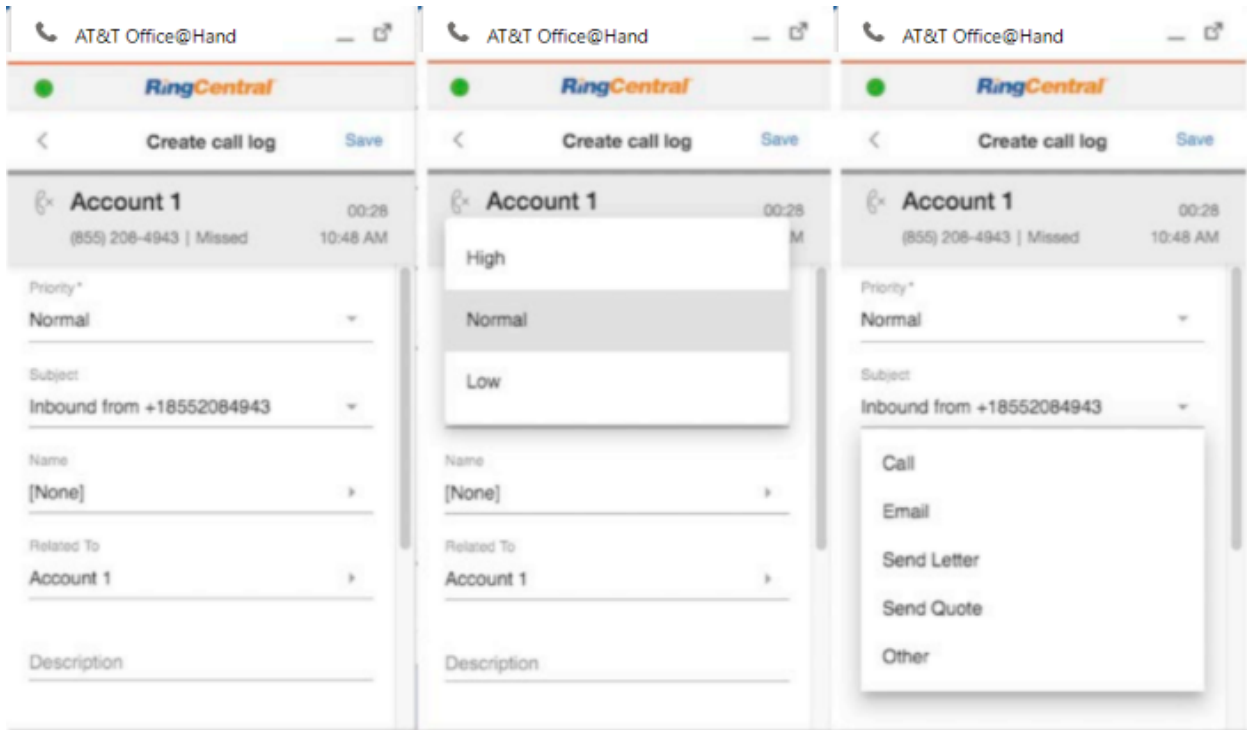
Whenever there is an incoming call, the application searches Salesforce for matching records. Depending on the settings of your SoftPhone Layout in Salesforce.com, you will see the results in either the same window or a new window.

If there is only one matching record, the detail page of that record will be displayed. If there are multiple records, usually, you should see the search page listing all of the matching records. These settings can be changed or updated only by your Salesforce administrator.

You can also find the matching record(s) in the **Related To** or **Name** dropdown in the app window.

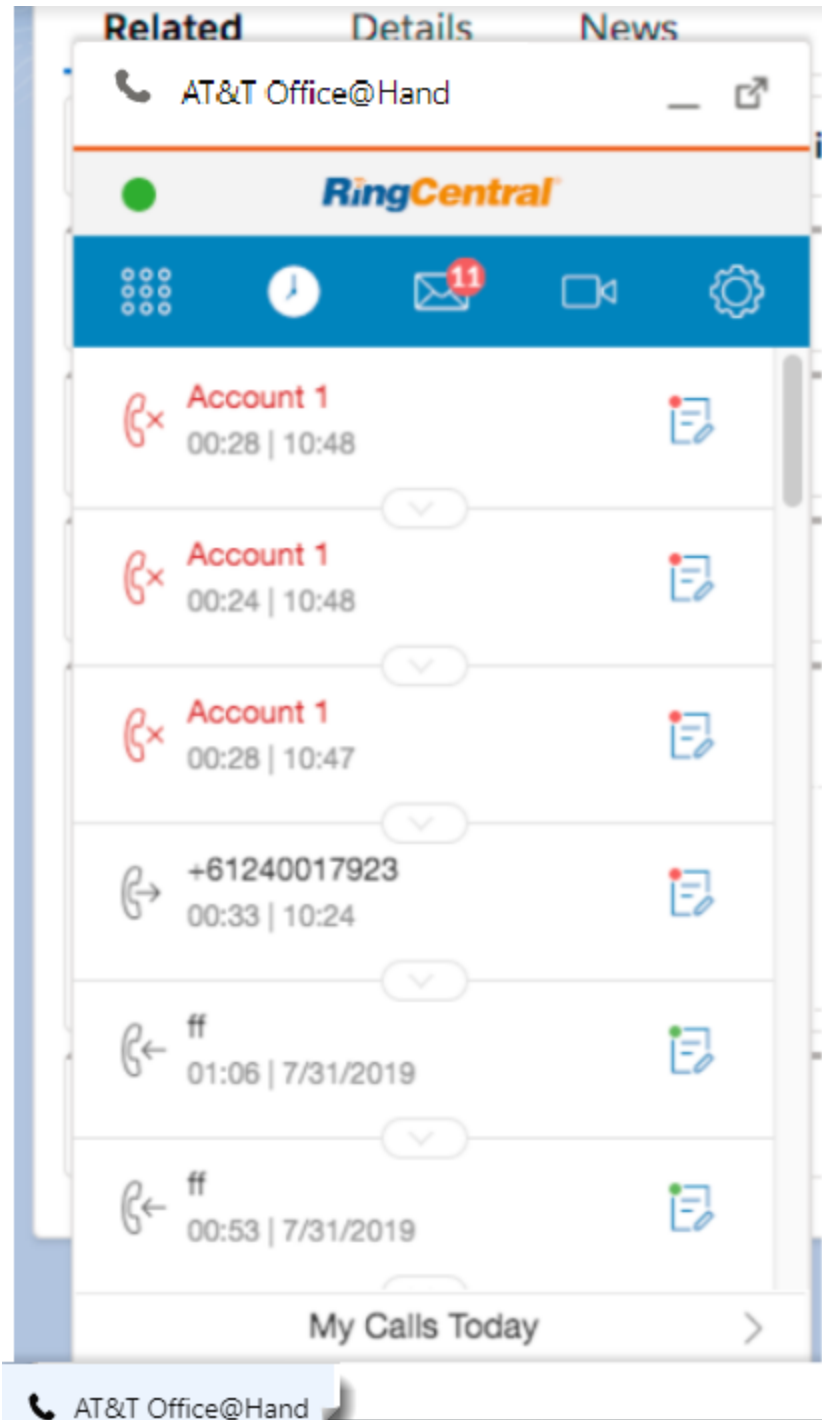
Logging calls

There are two ways you can log a call. The first is when the call is connecting, and the call log screen is shown. The user can select priority, subject, name, related to, and due date in the call log screen as below. The second is via offline logging.



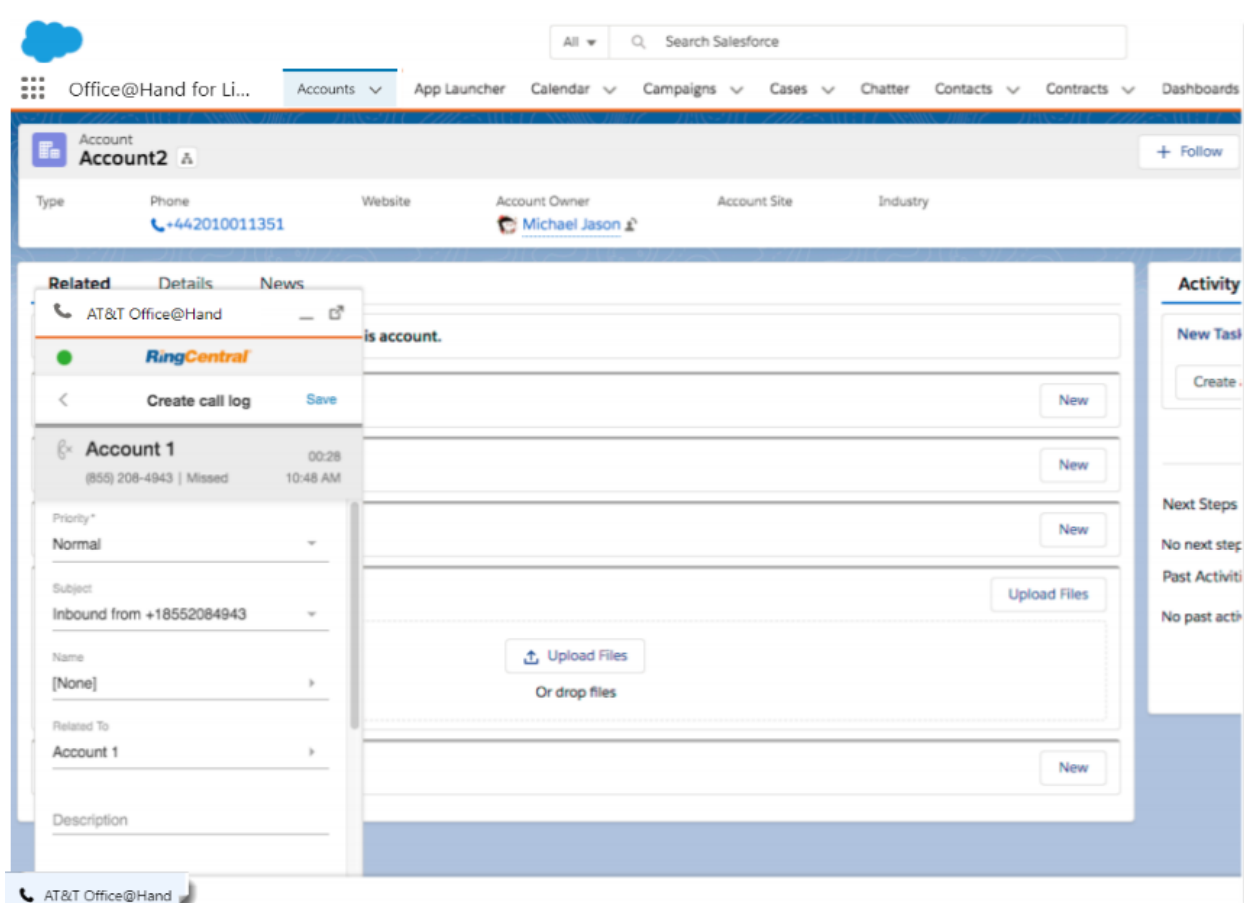
Offline logging and editing

If the call is disconnected, you can still go to call history and click the record with the red dot icon to log the note for the call. In terms of an already logged call, you can still reopen the note for editing. You can click the call record with a green dot icon for updating.



Selecting matched contact

If there is at least one contact match for the call, you can click the **Name** or **Related To** field to decide the name of that call.



When in the submenu call log screen in choosing a matched name, there are three functions supported here:

- **Search:** Use this to quickly filter out the matched names you want for selecting.
- **Navigate to:** If there is no sufficient matched name, you can still go to a specific name's profile via the Salesforce console, and the name will be auto-populated to the **Other** section in this screen.
- **Create new account/opportunity:** If there are no matches for existing Salesforce data, you can just create a new one.

When you open the Salesforce Account2 profile, Account2 will be auto-populated to the **Other** section.

The screenshot shows the Salesforce interface for an account named 'Account2'. The top navigation bar includes 'Office@Hand for Li...', 'Accounts', 'App Launcher', 'Calendar', 'Campaigns', 'Cases', 'Chatter', 'Contacts', and 'Contracts'. The account details section shows 'Type', 'Phone' (+442010011351), 'Website', 'Account Owner' (Michael Jason), 'Account Site', and 'Industry'. A 'Related' sidebar is open, displaying search results for 'Account/Opportunity'. The results are categorized into 'Matched' (Account 1) and 'Other' (Account2). The main content area shows a 'New' button and an 'Upload Files' section.

When you click *Create account* or *Create opportunity*, you can create it using the Salesforce pop-up screens.

The screenshot shows the Salesforce interface with two pop-up screens overlaid on the account page. The left pop-up screen is titled 'New Account - Business Account' and contains fields for 'Account Owner', 'Account Name', 'Phone', 'Account Number', 'Account Site', 'Type', 'Industry', 'Annual Revenue', 'SIC Code', and 'Address Information'. The right pop-up screen is titled 'New Opportunity' and contains fields for 'Opportunity Name', 'Amount', 'Close Date', 'Next Step', 'Account Name', 'Stage', 'Type', 'Probability (%)', 'Lead Source', 'Primary Contact', 'Search Campaigns', 'Phone', 'Number of Quotes', 'Last Modified', 'Order Number', 'Win/Loss/Completed', and 'Cancel'. Both pop-up screens have 'Cancel', 'Save & New', and 'Save' buttons.

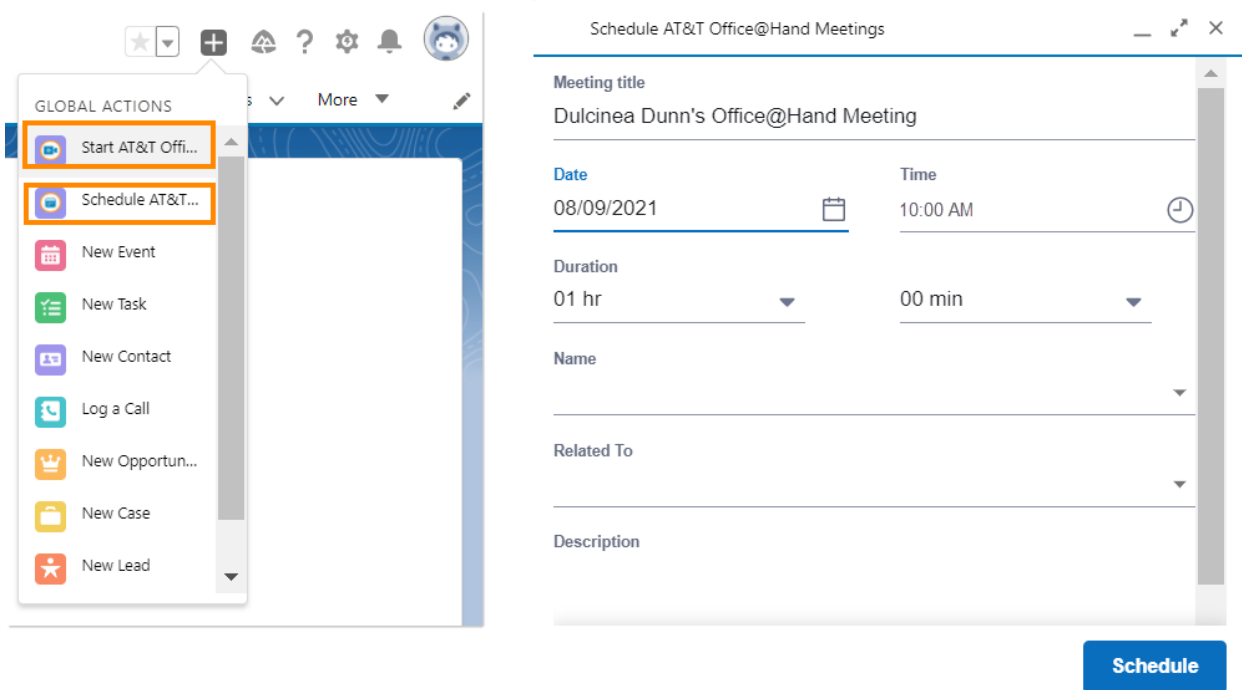
Organizing Meetings from Office@Hand Salesforce Integration

Conducting Meetings to showcase the product or providing a personal touch to the communication with a prospect or customer is an essential part of creating a successful sales team.

Office@Hand extends the capability to seamlessly schedule or start an instant meeting from right within Salesforce. Reps can schedule or start an instant meeting in the following ways:

- From the Office@Hand CTI App in Salesforce: End users can schedule an Office@Hand Meetings session from the Office@Hand app in Salesforce. Also, an event is created in Salesforce for the scheduled meeting.
- From Global Actions in Salesforce: Users can easily schedule an Office@Hand Meetings session from Salesforce Global Actions. Office@Hand provides two actions in Salesforce Global Actions:
 - To schedule an Office@Hand Meeting session
 - To start an instant Office@Hand Meetings session

Once users click on any of the above actions, they will be prompted to sign into their Office@Hand account and schedule or start an instant Office@Hand Meetings session.



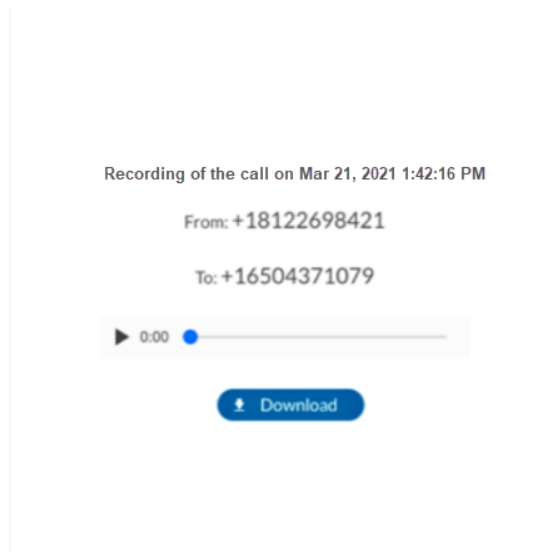
Call recording

If you record your call and logged that call in Salesforce.com, you can find the call recording in the **Task Detail** page within a field **Call Recording**.

Click the link and you will be prompted to log in with your Office@Hand credentials.



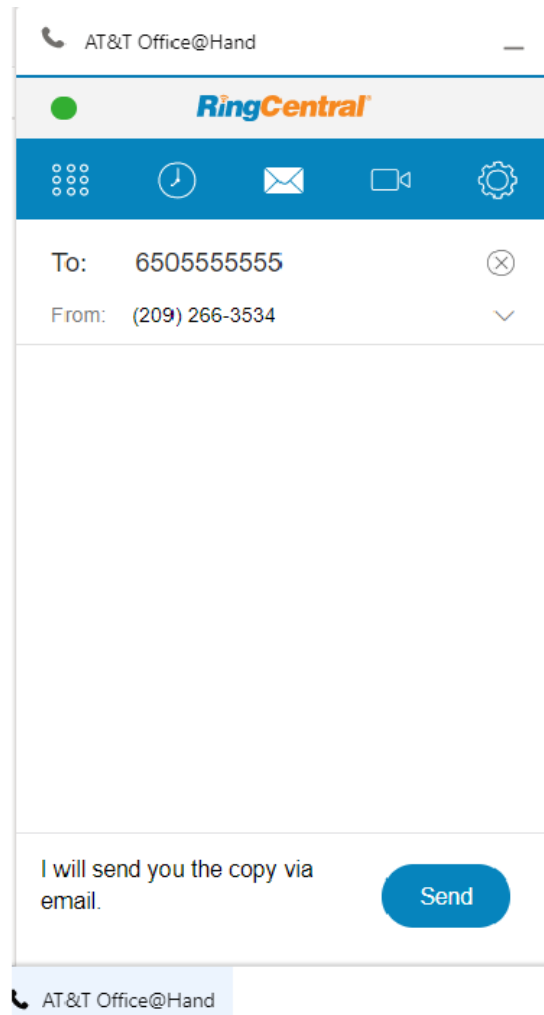
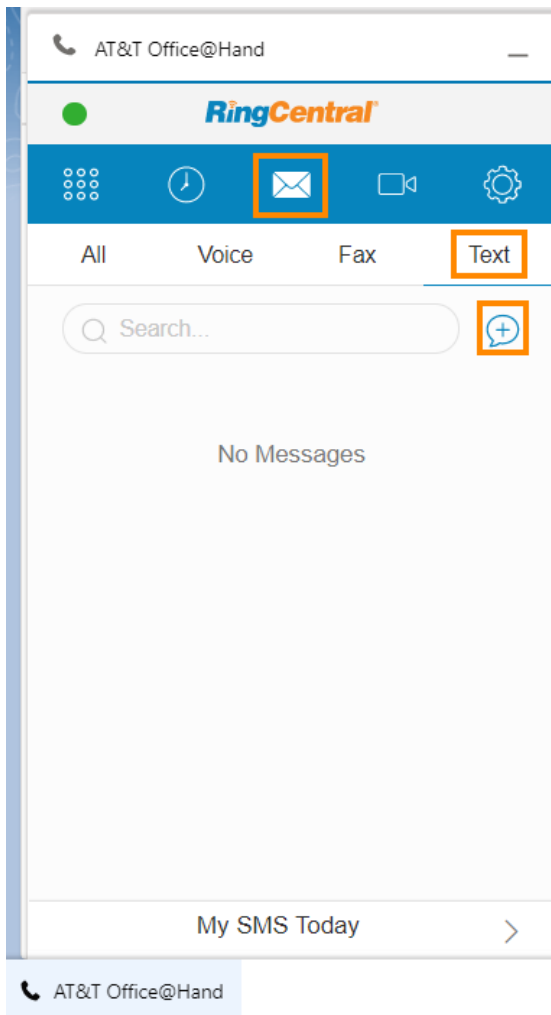
You can select to play or download the call recording.



Note: You can access only the call recordings that you record. Only the system administrator of your Office@Hand account can access all the call recordings in the organization.

Compose text

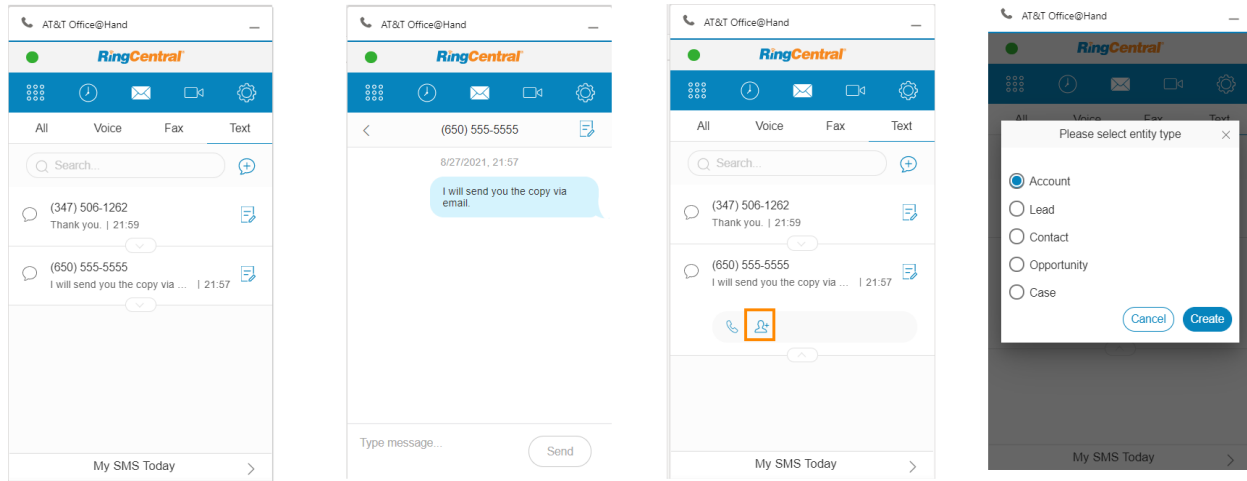
Click **Messages > Text > Compose Text**. Select from which of your numbers you wish to send the text. Enter the **To** phone number and compose the text message. Click the **Send** button. The sent message will be displayed in the conversation area.



Messages

Message history of the past seven days can be found in the **Messages** tab.

If it's an unknown number, you could create a Salesforce object for it or link it to an existing one.



To save messages as related activities, if you have **Auto-create SMS Log** turned on, the messages will be logged the moment it's successfully sent/received. Once you log into the Office@Hand for Salesforce app, all the history messages will be logged as well. If you have the **Autocreate SMS Log** turned off, and if you wish to create a log for a message conversation, go to the message conversation details page and click the **Save** icon.

Auto Log

There are two types of auto-log functions to help users better track calls and SMS. They are **Auto log calls** and **Auto log notes**.

Auto log calls

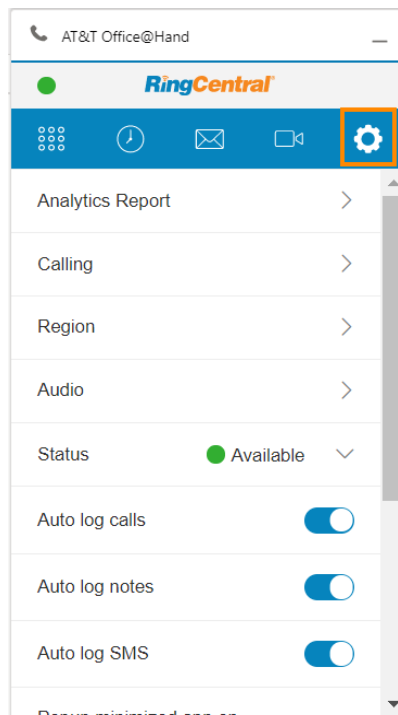
When you turn on auto-log calls, the incoming calls will be logged automatically. This covers basic call fields, such as **Name, Related To, Subject, Description**, etc.

Auto log notes

When you turn on auto-log calls, the incoming calls and their customized fields data will be logged automatically. The admin account can set the customized fields via **AdminUI**. In addition to basic Call fields, you can define columns that match field type in Salesforce Task as additional fields to log here. The field type includes **Lookup, Date, Picklist, Text**, and **Text Area**. All fields in Task entity matches selected field type will be logged as well.

Trigger timing

There are two types of trigger timing: **on call ringing** and **on call answered**, which can be set by an admin account via **AdminUI**.



Activity Report

As you log calls and messages, you will see a link to **My Calls Today** at the bottom of the dialer tab and a link to **My SMS** at the bottom of the **Compose Text** and **Messages** tabs. Clicking the links will take you to the Lightning **REPORT** page.

All the fields in the report can be self-defined in the Salesforce.com **Reports** tab. You can add/drop fields and change the display order by dragging and dropping the fields from the left side to the right side.

| Report: Tasks and Events My Calls Today | | | | | | | | | | |
|---|------------|--------------------------|-----------|----------|-----------|-------------------------------------|-------------------|---------|------|-------------|
| Total Records 1 | | | | | | | | | | |
| | Assigned | Subject | Date | Priority | Status | Task | Company / Account | Contact | Lead | Opportunity |
| 1 | Dulcinea D | Outbound to +13475061262 | 8/27/2021 | Normal | Completed | <input checked="" type="checkbox"/> | - | - | - | - |

| Report: Tasks and Events My SMS Today | | | | | | | | | | | |
|---|---|-----------|---|-----------|---------|------------|------|-------------|----------|-------------------------------------|--|
| Total Records 2 | | | | | | | | | | | |
| | Subject | Date | Comments | Status | Contact | Assigned | Lead | Opportunity | Priority | Task | |
| 1 | (8/27/2021) SMS between +13475061262 and +12092663534 | 8/27/2021 | +12092663534: I will send you the copy via email. +13475061262: Thank you. | Completed | - | Dulcinea D | - | - | Normal | <input checked="" type="checkbox"/> | |
| 2 | (8/27/2021) SMS between +16505555555 and +12092663534 | 8/27/2021 | +12092663534: I will send you the copy via email. | Completed | - | Dulcinea D | - | - | Normal | <input checked="" type="checkbox"/> | |

Analytics Report

Entry for Analytics Report

Click the **Settings** gear icon, then click **Analytics Report**. If you have not set up the role hierarchy, it only shows your individual data for logging accounts, but it shows the data of all team members under you according to the hierarchy set up in Salesforce Roles.

The screenshot displays the RingCentral Salesforce dashboard. On the left, a sidebar menu is visible with the RingCentral logo and a settings gear icon highlighted by a red box and an orange arrow. The main dashboard area shows the following data:

- Team Summary** (12 members):
 - Total calls: 724
 - Avg. Call Duration: 08:23
 - Avg. calls/day: 12.24
- Communication type** pie chart:
 - 0.00% Call
 - 0.00% Email
 - 0.00% Send Letter
 - 0.00% Send Quote
 - 0.00% Other
 - 0.00% N/A
- Call route** pie chart:
 - 0.00% Inbound call
 - 0.00% Outbound call

The Overview of the Analytics Report

There are four parts to compose the Analytics Report. From top to bottom, they are Time selection, Overall KPIs, Bar-chart, and Table. Overall, there are two types of view in the report: **Team view** and **Individual view**. You can see all your members under your role in the Salesforce roles hierarchy. When you click one name from the **User name** field at the bottom table, it redirects to an individual page view.

There is no difference between the **Team view** page and the **Individual view** page, except the number of members shown on the page. If you don't set up the roles hierarchy, it only shows the individual view by default.

The image shows a screenshot of the RingCentral Salesforce dashboard with four callouts pointing to different parts of the interface:

- 1) Time selection:** Points to the date range selector at the top of the dashboard, which is set to "Last week (2019/04/07 - 2019/04/13)".
- 2) Overall KPIs: multiple data metrics to represent whole the team:** Points to the "Team Summary" section, which displays three key metrics: Total calls (42), Avg. handle time (01:05), and Avg. hold time (6). Below these are two pie charts representing call disposition and call status.
- 3) Bar-chart: comparison across different members by selected data category:** Points to the "Individual Insights" section, which features a bar chart comparing various metrics across different team members.
- 4) Table: overall raw data table for whole the team:** Points to the "Representative" table at the bottom, which lists individual team members and their performance metrics.

The "Representative" table contains the following data:

| User name | Total calls | Avg. handle time | Avg. hold time | Call disposition | Call status | Other |
|---------------|-------------|------------------|----------------|------------------|-------------|-------|
| Benjamin Hahn | 7 | 1 | 00:50 | 0 | 0 | 0 |
| Pragna D | 6 | 0:7 | 0:47 | 1 | 0 | 1 |
| Maya Dushan | 6 | 1:1 | 0:26 | 1 | 0 | 3 |
| Shrey T | 6 | 0:8 | 0:40 | 0 | 0 | 0 |
| Sahana S | 6 | 2:0 | 0:26 | 1 | 0 | 0 |
| | 4 | | | | | |

Time Selection

At the top is a Time selection for users to quickly pick up time templates, such as **Last 30 days** and **Last month**, and more. The user can also define their own time period by directly choosing the start date and end date from the calendar.

RingCentral Salesforce dashboard

7 Last 7 days (2021/08/21 - 2021/08/27)

Team

Total c

Comm

Today

Yesterday

Last 7 days

Last 30 days

Last week

This month

Last month

Custom Range

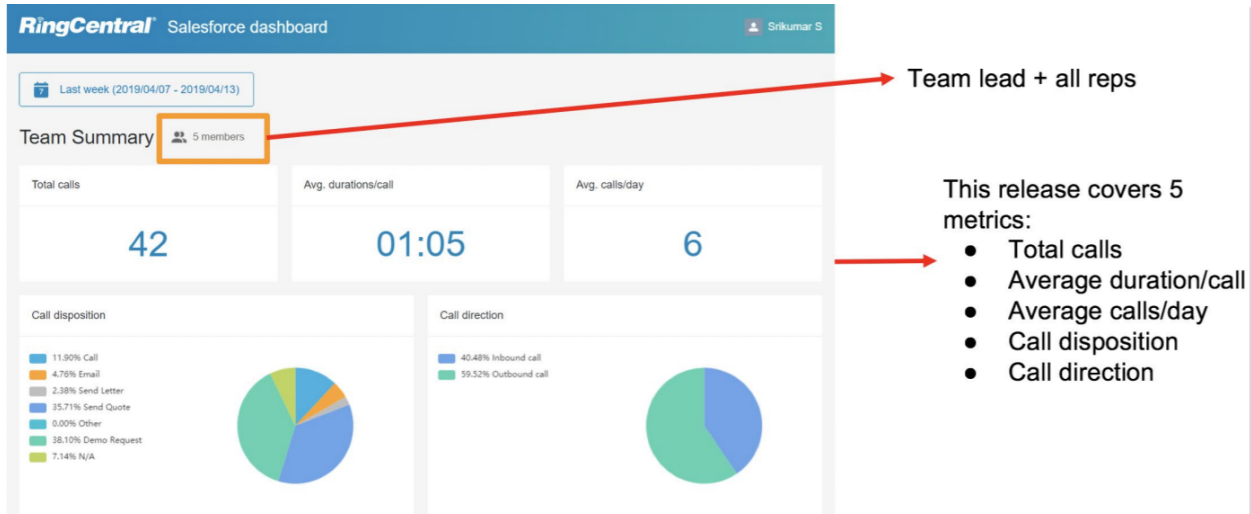
| Jul 2021 | | | | | | | Aug 2021 | | | | | | |
|----------|----|----|----|----|----|----|----------|----|----|----|----|----|----|
| Su | Mo | Tu | We | Th | Fr | Sa | Su | Mo | Tu | We | Th | Fr | Sa |
| 27 | 28 | 29 | 30 | 1 | 2 | 3 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 | 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 | 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 | 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 29 | 30 | 31 | 1 | 2 | 3 | 4 |

08/21/2021 - 08/27/2021

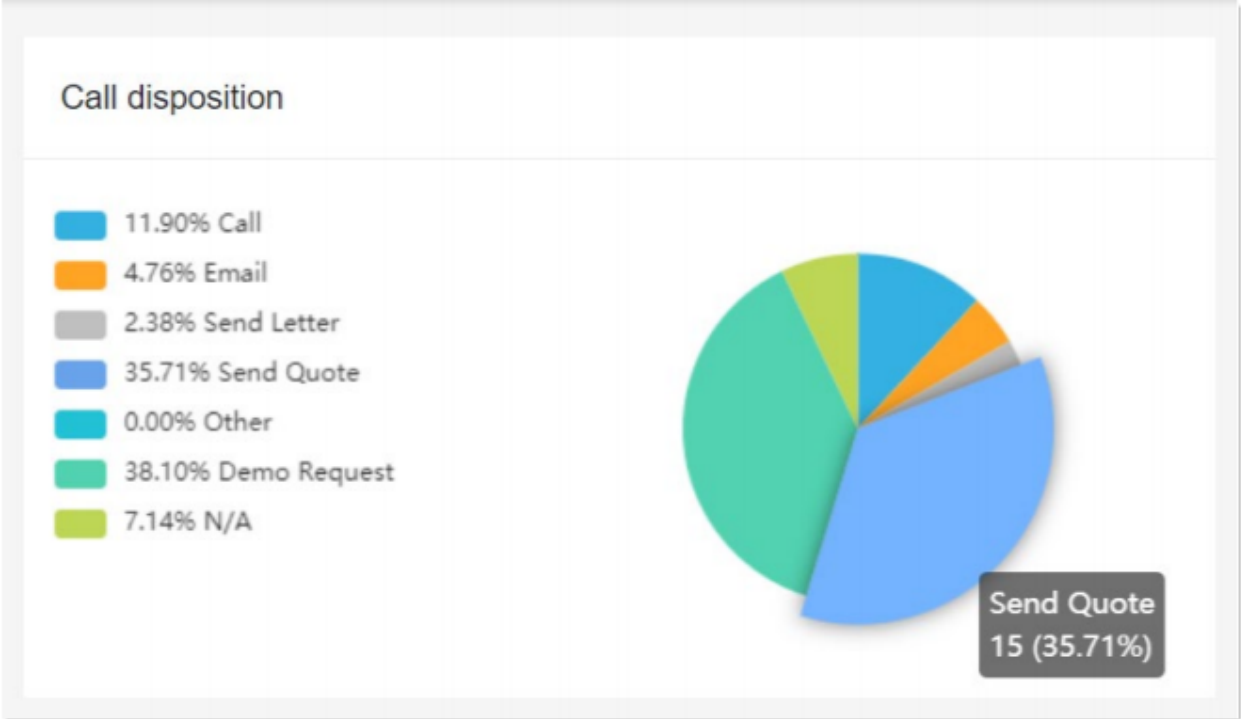
Cancel Done

The Overall KPIs

The first session of the report is the team overall KPIs. From here, the user can easily manage how the team behaves from a call perspective. The number here can also be the reference when comparing an individual rep's number.

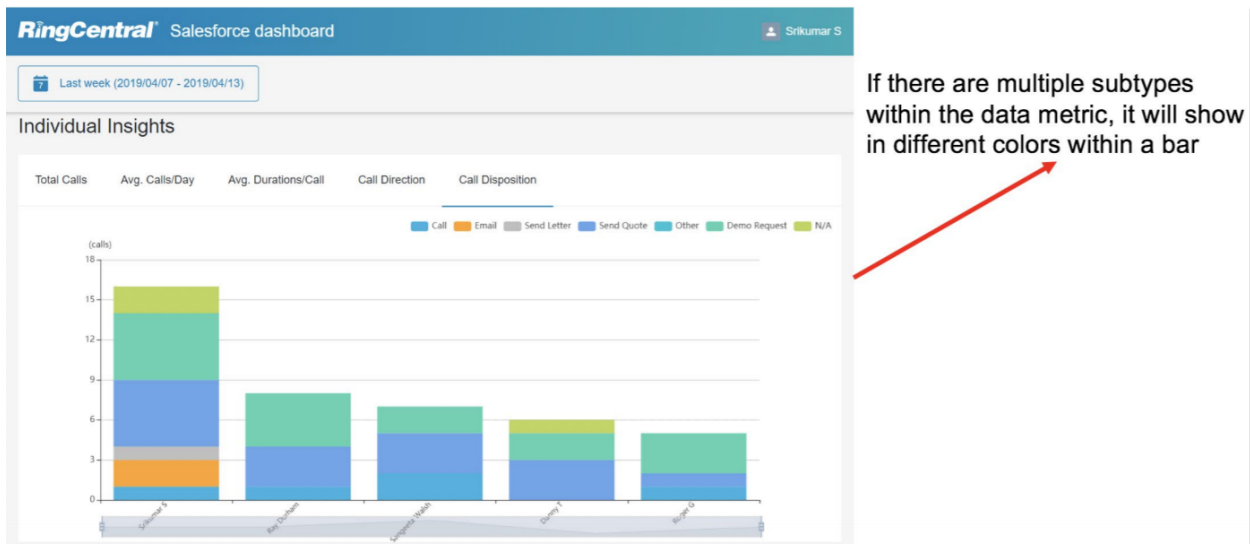
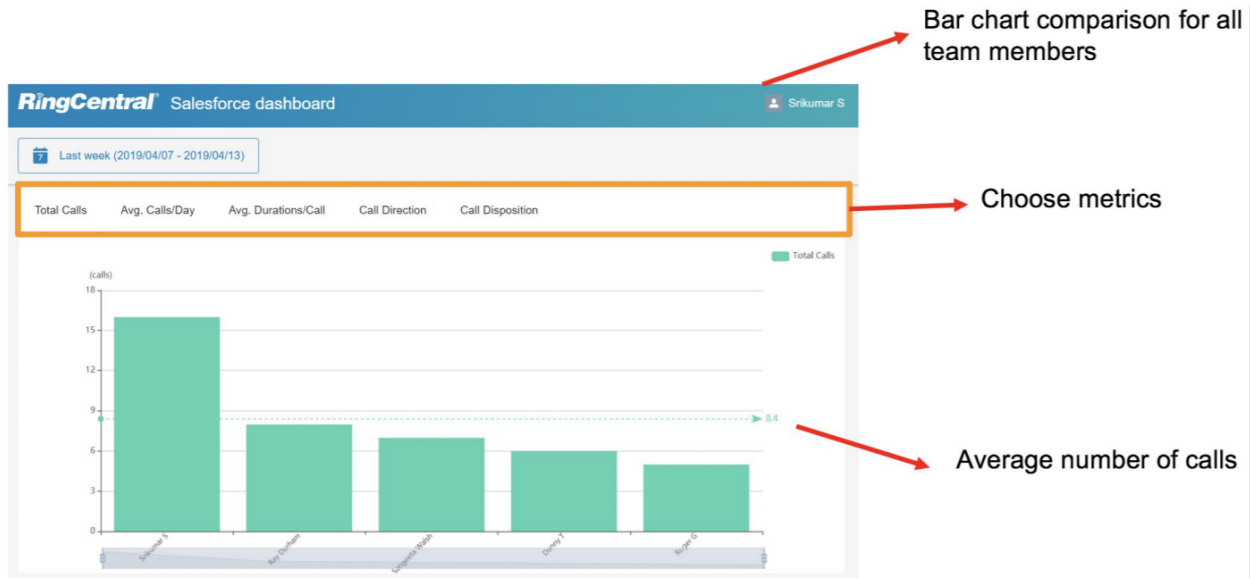


When you hover over the pie chart, it will show the number of calls logged for that specific call disposition.

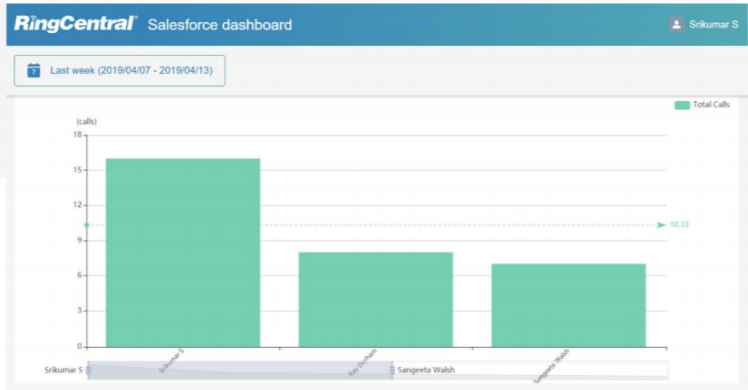
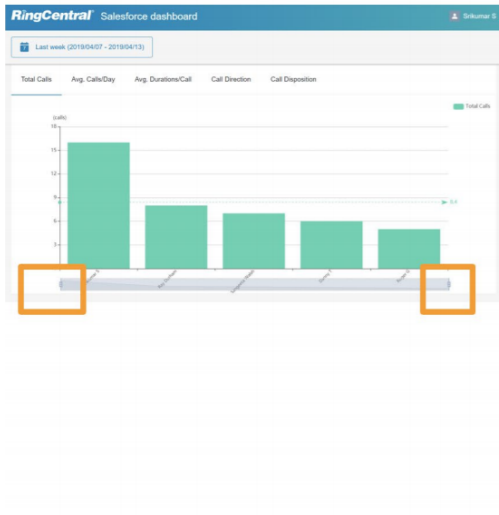


The Bar Chart

In the middle of the report is the Bar-chart to show the comparison among sales rep team reps. You can click what data metrics you want to see at the top. Each individual rep data will show as a bar, and there is also a team average line in the bar chart.




Zoom in or out to view individual or all team performance. Move the slider to view an individual rep's data, multiple reps or the entire team's performance.



The Table

At the bottom of the report, it shows a table to display all metrics by all sales reps. Each individual name is clickable to link to the **Individual view** page to see specific one-person data metrics only.

 Last week (2019/04/07 - 2019/04/13)

Representative

| User name | Total calls | Avg. calls/day | Avg. durations/call | Call disposition | | | | | | | Call direction | |
|--------------------------------|-------------|----------------|---------------------|------------------|-------|-------------|------------|-------|--------------|-----|----------------|----------|
| | | | | Call | Email | Send Letter | Send Quote | Other | Demo Request | N/A | Inbound | Outbound |
| Sangeeta Walsh | 7 | 1 | 00:32 | 2 | 0 | 0 | 3 | 0 | 2 | 0 | 3 | 4 |
| Roger G | 5 | 0.7 | 01:57 | 1 | 0 | 0 | 1 | 0 | 3 | 0 | 3 | 2 |
| Ray Durham | 8 | 1.1 | 00:26 | 1 | 0 | 0 | 3 | 0 | 4 | 0 | 4 | 4 |
| Danny T | 6 | 0.9 | 01:42 | 0 | 0 | 0 | 3 | 0 | 2 | 1 | 1 | 5 |
| Srikumar S | 16 | 2.3 | 01:09 | 1 | 2 | 1 | 5 | 0 | 5 | 2 | 6 | 10 |

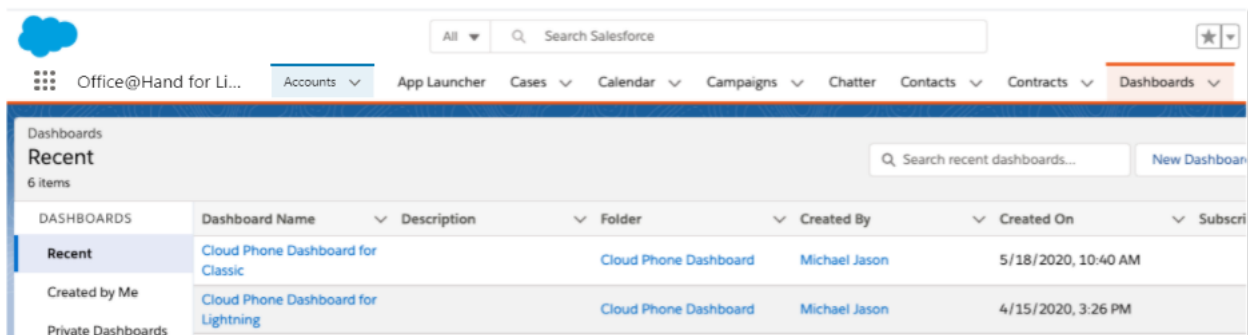
Team lead can click on the rep name to go into view the details of that rep.

Cloud Phone Report (beta)

With Cloud Phone Reports, you 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.

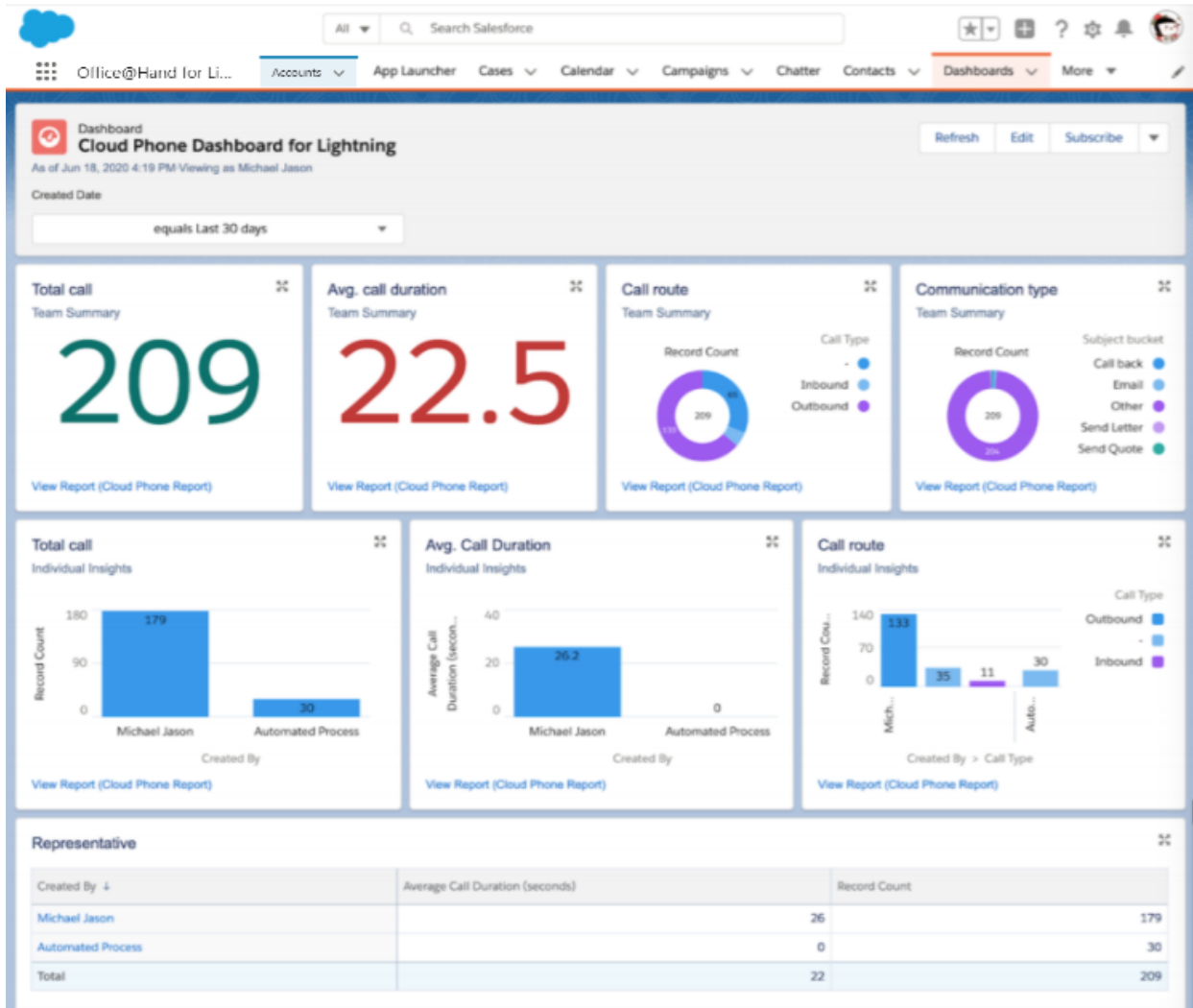
To access the Cloud Phone Reports, navigate to the **App Launcher** and click on **Office@Hand for Lightning App**. Next, click the downward arrow next to the **Dashboards** menu and click **Cloud Phone Dashboard for Lightning or Classic**. If you do not find a **Dashboards** menu, click on the downward arrow.



The screenshot shows the Salesforce interface with the Dashboards menu open. The 'Recent' section lists two dashboards:

| DASHBOARDS | Dashboard Name | Description | Folder | Created By | Created On | Subscri |
|---------------|-------------------------------------|-------------|-----------------------|---------------|---------------------|---------|
| Recent | Cloud Phone Dashboard for Classic | | Cloud Phone Dashboard | Michael Jason | 5/18/2020, 10:40 AM | |
| Created by Me | Cloud Phone Dashboard for Lightning | | Cloud Phone Dashboard | Michael Jason | 4/15/2020, 3:26 PM | |

The reports in the Dashboard can be accessed from the Reports menu within Salesforce and by clicking on the **Cloud Phone Report** to create customized reports, which can then be included in the 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.

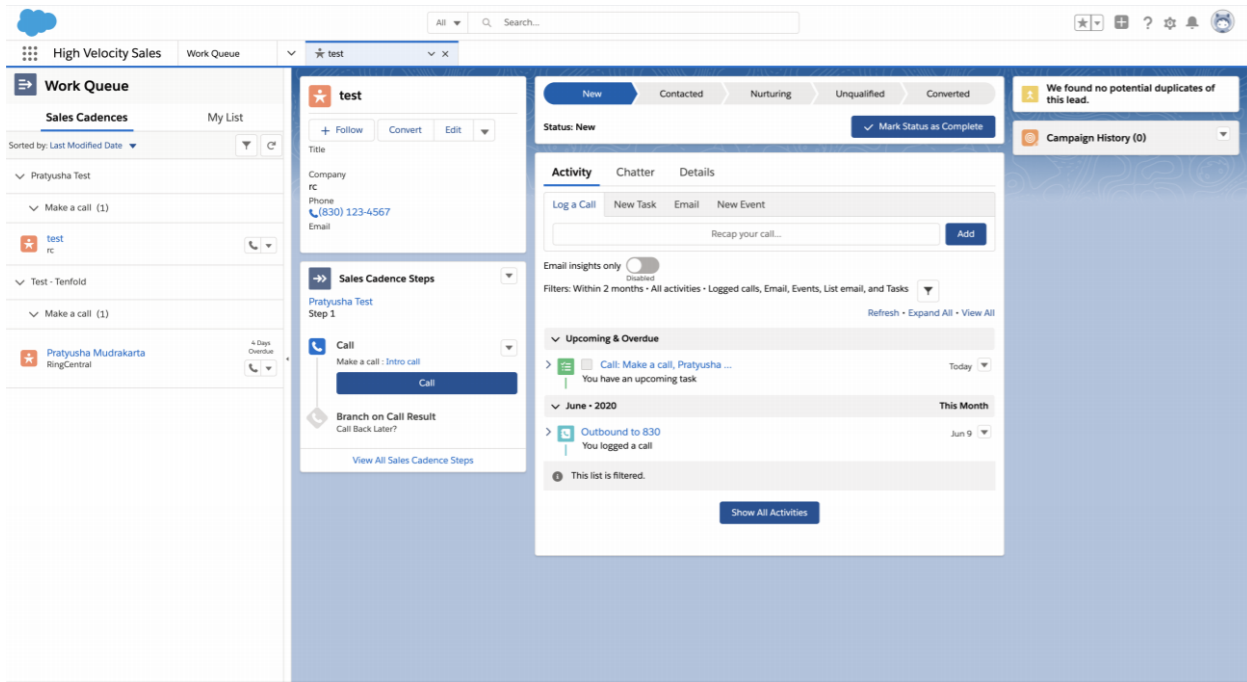
Calling and sending SMS with Office@Hand from Salesforce mobile app

Please make sure you have installed the Office@Hand mobile app to use these functions.

Log in to Salesforce mobile app. Go to check the details of an account, a contact, or a lead with phone numbers(s). On the bottom menu, you can find the Call with Office@Hand and SMS with Office@Hand options.

Clicking on the **Call with Office@Hand** button will redirect you to a page with all the phone numbers of that account/contact/lead/case listed. Select and click on a phone number. Select **Call with Office@Hand**, and the phone number will be dialed in your Office@Hand mobile app.

You can expand each **Sales Cadence** to view the Leads or Contacts listed within and click on the Lead/Contact to view more details.



Placing a Call

Click on the call icon beside a Lead or Contact in the **Work Queue** to initiate a call. You will also notice that the Cadence moves forward under the **Activity** tab after you place the call.

The screenshot displays the Salesforce Work Queue interface. On the left, the 'Work Queue' sidebar shows a list of sales cadences. The 'Pratyusha Test' cadence is expanded, showing a task 'Make a call (1)'. A red box highlights a call icon next to the 'test rc' entry. The main content area shows the details for the 'test' lead, including contact information and a 'Call' button. The 'Sales Cadence Steps' section shows a 'Call' step. The 'Activity' tab is active, displaying a list of activities, including 'Outbound to 830' and 'Call: Make a call, Pratyusha ...'. The 'Status' is 'New', and the 'Campaign History' is empty.

Depending on your calling settings, an outbound call will initiate once the phone icon next to the Lead or Contact is clicked. If you choose to *Call with Softphone*, your Office@Hand desktop app will be initiated to place the call.

Once you have picked up the call on your Office@Hand app and it starts ringing the other party, the screen will get updated to the following display. If the call is connected successfully, the Office@Hand for Salesforce display will start showing a call timer and an area to take call notes and dispositions. You will also notice that the **Sales Cadence** moved forward under the **Activity** tab showing the Outbound call activity.

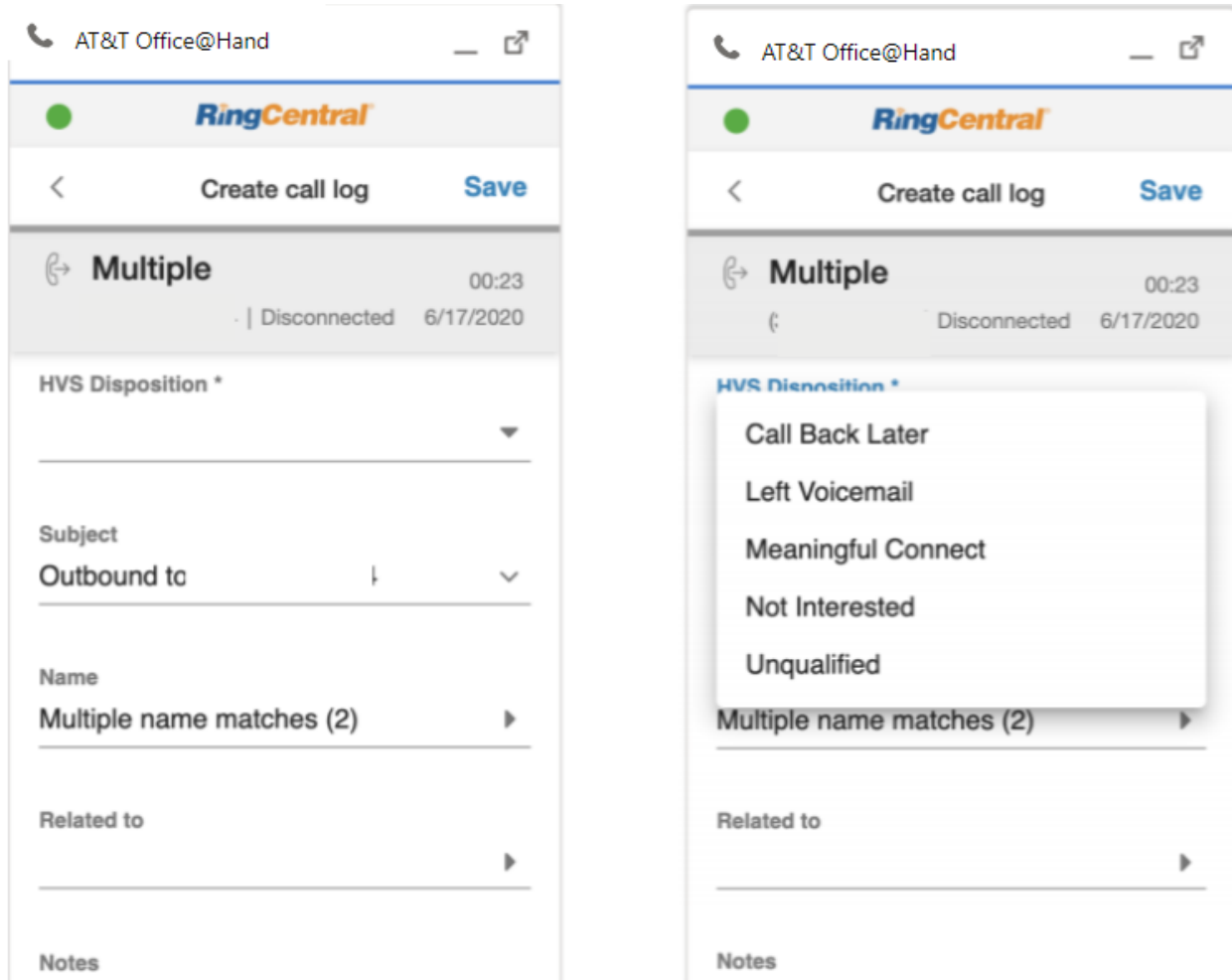
The screenshot displays the Office@Hand for Salesforce desktop application interface. The main window is titled "Pratyusha Mudrakarta" and shows a call in progress. The interface is divided into several sections:

- Work Queue:** Located on the left, it shows a list of sales cadences. The current cadence is "Pratyusha Mudrakarta" with a "Call" button.
- Sales Cadence Steps:** Below the work queue, it shows the current step of the sales cadence, "Call", with a "Call" button.
- Activity:** The central section shows the activity log for the contact. It includes a "Log a Call" button and a "Recap your call..." button. The activity log shows a list of activities, with the current activity being "Outbound to 830" (highlighted in red) with the note "You logged a call".
- Call Log:** At the bottom left, there is a call log showing the call duration (00:09) and the time it was connected (4:13 PM).
- Subject:** The subject of the call is "Outbound to".
- Name:** The name of the contact is "Pratyusha Mudrakarta".

The interface also includes a search bar at the top, a status bar at the bottom, and various navigation and utility icons.

The call log in Office@Hand for Salesforce displays a field called **HVS Disposition**. You can select a value based on the call outcome from the dropdown list, which when selected, moves the **Sales Cadence** forward to the next action for this Lead/Contact.

Users with administrator access to your Salesforce account have the permission to mark the **HVS Disposition** as a required field or not in the call log.



Call logging

When Auto Log Calls setting is enabled

In this scenario, once a value is selected for the **HVS Disposition** field, the call log gets auto-saved, and this causes the **Sales Cadence** to move forward to the next action.

If the **HVS Disposition** is marked as a required field, the call log will not be saved and will show an alert if you navigate away from the call log without selecting a value from the dropdown menu. However, you can find

the call later in the call history marked with a red dot and select the **HVS Disposition** to move the **Sales Cadence** forward.

When Auto Log Calls setting is disabled

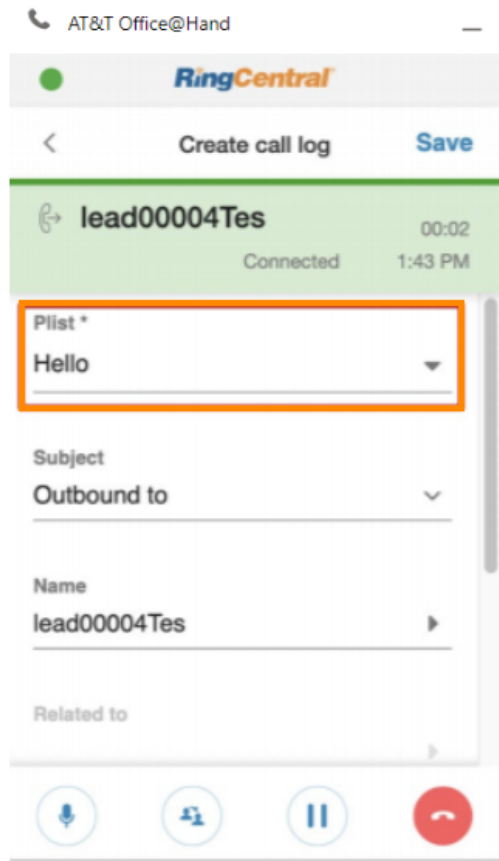
In this scenario, once a value is selected for the **HVS Disposition**, you must click on the **Save** button to log the call and move the **Sales Cadence** forward to the next action.

If the **HVS Disposition** is marked as a required field, the call log will show an alert if you navigate away or try to click the **Save** button without selecting a value from the dropdown menu. However, you can find the call later in the call history marked with a red dot and select the **HVS Disposition** to move the **Sales Cadence** forward.

Note: Once the **HVS Disposition** field is filled with a value, it cannot be changed from the Office@Hand for Salesforce widget. However, any changes made from the Salesforce interface for this field will be reflected in the widget.

Custom field

The **HVS Disposition** field can also be a custom field, such as a **Picklist (Plist)** shown below. Users with administrator access have permission to mark the field as required or not.



Troubleshooting

Q: I can't see Office@Hand for Salesforce when I log in to Salesforce. What is the problem? Does it require some special permission?

A: No, Office@Hand for Salesforce does not require any special permissions, and it should work for all user profiles. Please ask your Salesforce administrator to ensure that you are a member of the Call Center and ensure that no other components on the page interfere with the operation of Office@Hand for Salesforce.

Q: I don't see any new tab or window opening on incoming calls.

A: Please ensure that pop-ups are not blocked by your browser settings or by some other pop-up blocker software installed on your desktop.

Q: Can I use Office@Hand for Salesforce across multiple Salesforce.com instances (or "orgs")?

A: Yes, you can. You will need to contact your Salesforce administrator to set up and enable Office@Hand for Salesforce for each of your orgs.

Q: Can I use Office@Hand for Salesforce across multiple browsers (Internet Explorer and Firefox, for example)?

A: Office@Hand for Salesforce can be used across as many browsers as you want so long as the user is not logged into two or more browsers simultaneously. This means that the user cannot be logged in to Salesforce.com on Internet Explorer and Firefox at the same time. Simultaneous logins are not supported.

Q: I make a call to myself, and the incoming call features are not working.

A: This behavior is expected – calls from your own extension to your own extension will not appear in this app.

Q: I can see some phone numbers in Salesforce, but the click-to-call icon is not displayed.

A: It may be due to some customizations made for your Salesforce account. Please contact your Salesforce administrator.

Q: I cannot find the Office@Hand call and SMS options in Salesforce1.

A: Please contact your Salesforce administrator if the actions are added to the Page Layouts.

Q: I would like to disable this feature for now.

A: You will have to request that your Salesforce administrator remove you from the Call Center profile list.

Q: What Operating Systems are supported?

A: The following Operating Systems are supported:

- Windows 7 and above
- Mac OS X Mountain Lion and above

Q: What browsers are supported?

A: Office@Hand for Salesforce supports the following browsers:

- Internet Explorer 11 and higher (Windows)
- Firefox 52 and higher (Windows, Mac)
- Chrome 56 and higher (Windows, Mac)
- Safari 11 and higher (Mac)
- Microsoft Edge 38+

Q: On logging into Office@Hand for Salesforce, I am getting this error message: “Your Office@Hand Office edition does not support Salesforce Integration—please call your Office@Hand account representative to upgrade your Office@Hand Office edition.” What is that?

A: Salesforce integration is available for Office@Hand Office Premium and Enterprise Edition users. Please check with your Office@Hand administrator or contact your Office@Hand representative to get more information about this feature.

Q: Incoming calls are not notified in the Salesforce interface, even if everything is set up correctly.

A: At least one tab in the browser should be displaying the Office@Hand for Salesforce interface for incoming calls to be notified.

Q: Search results are not displaying records that match the caller ID.

A: Check the format of the phone number in Salesforce. Ensure the format is standardized per Salesforce features.