



FAQs

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1. What is Outloud?

Outloud is a tool that lets you talk to Salesforce in natural language. It turns what you say into notes or actions. So you don't have to type and you can translate the notes into over 50 languages.

2. How does Outloud work?

Outloud is a Salesforce-native app that uses an external AI provider (OpenAI) for transcription, translation and command recognition. Outloud records your voice, securely sends it to OpenAI for transcription and command recognition, and lets you review suggested actions before anything is saved to Salesforce. All your data is stored in your Salesforce instance, and no data is retained in external services.

3. Who created Outloud?

Robin Labs, the innovation practice of Robin Consulting, a Salesforce Consulting firm and a Salesforce ISV.

4. Why did Robin Labs develop Outloud?

Besides Robin Labs, we also run Robin Consulting, a boutique services firm that delivers Salesforce implementation projects. Across industries and company sizes, our clients kept telling us the same thing, they're tired of typing! So we thought: what if they could just speak instead? We built a prototype of Outloud and showed it to a few clients. Their reaction was immediate and consistent: "This can't be real!" We kept demoing it just to watch people light up. And that's when we knew we had to turn it into a market-ready product.

5. How secure is Outloud?

Outloud is designed with security at its core. Your voice notes are stored only in your Salesforce instance and never accessed by us. For transcription and analysis, data is securely sent to OpenAI with zero-retention policies, meaning nothing is stored after processing. All actions respect your Salesforce sharing and permission settings, so users can never do more than they're allowed to in the UI.

6. How does Outloud use my data?

Outloud securely sends only your voice recordings for transcription, translation, and identifying commands to OpenAI. No Salesforce data leaves your Org. Processing is handled securely



through OpenAI with zero-retention policies. We never access or store your voice recordings and notes, they live entirely in your Salesforce instance.

7. Where are my voice notes stored and who can access them?

Your voice notes are stored in your Salesforce instance. We never have access to any of your data. The voice recordings are shared securely with OpenAI to transcribe, translate and identify commands in your notes. OpenAI supports zero retention policies so that none of your data is retained after processing.

8. How safe is it to execute voice commands in Salesforce via Outloud?

Completely safe. Execution happens only inside Salesforce and respects each user's sharing and CRUD permissions. User can do nothing more with commands than what they can normally do in the UI.

9. Is any of my voice data stored or retained by any third parties?

No.

10. How to get an OpenAI API Key?

- Go to platform.openai.com, create an account, and add a payment method under "Billing." This is required for the key to work.
- Navigate to the "API Keys" section and click "+ Create new secret key."
- Give the key a descriptive name and click "Create secret key."
- Copy the new key. It will only be shown once. Store it in a secure place, like a password manager.

11. Does OpenAI keep a copy of my voice notes during transcription?

OpenAI supports zero retention policies so that none of your data is retained after processing.

12. Is my record data (Account, Contact etc) sent to external services to execute voice commands?

No, your record data never leaves Salesforce. We only share some details of the schema of each object (what fields it has, not what they contain) to be able to understand and execute commands.



13. Who can manage the API key used by Outloud?

Only the admin who entered the API key can change or remove it, even if other users have the Outloud Admin permission set. This prevents unauthorized changes and supports access control.

14. What does it mean that Outloud is Salesforce-native?

It means Outloud is built directly on the Salesforce platform. It is not integrated from outside. Your voice notes, actions, and data stay entirely within your Salesforce environment, ensuring full compliance with your Org's security, permissions, and data residency policies. No external systems are used to store or process your data.

15. What is the pricing?

Outloud is priced at \$19 per user, per month, billed annually, with no limits on what you can do. There is also a small usage-based cost from OpenAI for transcribing and processing your voice notes. This cost is typically just a few cents per note, depending on the length of what you say. Most users find this adds only a minimal amount to their monthly usage.

16. How can I estimate OpenAI usage-based costs?

OpenAI's cost is based on the number of tokens processed per note. For typical usage, this results in less than a few cents per note. You can monitor token usage in the OpenAI dashboard linked to your API key.

17. What are my payment options?

You can purchase Outloud on the Salesforce AppExchange with any major credit card.

18. Which Salesforce editions are supported?

Enterprise, Performance, Ultimate editions are supported. Professional is supported only when API access is enabled.

19. Can I try Outloud before I buy?

Absolutely. We offer a full-featured, 7-day free trial directly from our AppExchange listing. Go ahead and try it, you'll love it.

20. Can I use Outloud straight away after buying it?

You can start using Outloud right away! It's designed to work out-of-the-box with a simple setup, no implementation is needed. A Salesforce System Admin just needs to install it from



AppExchange, enter the API key for OpenAI, and choose which objects to enable. No custom implementation is required.

21. What happens if Outloud misunderstands what I said?

You're always in control. After recording, Outloud may suggest actions based on what it heard. Before anything is done in Salesforce, you can: 1. Pick which actions are correct 2. Delete or re-record if needed You can always edit the note later if something wasn't captured correctly. Nothing is saved until you confirm.

22. Can I edit or delete a Voice Note?

Yes. After recording, you can review the transcription and either edit, delete, or re-record it.

23. Can I use Outloud without an internet connection?

Outloud requires an active internet connection to send your voice note for transcription and processing. If you are offline, you will not be able to record new notes. However, all previously recorded and transcribed notes remain safely stored in your Salesforce org and are available for viewing.

24. Do I need to speak a certain way or use special commands?

No special commands are required. Outloud is designed to understand natural, conversational speech – so just speak as you normally would.

25. What is the difference between a Voice Note and a Voice Command?

A Voice Note captures what you said as a written log, like a meeting summary or reminder. A Voice Command is when Outloud recognizes an action in your speech, like *"Create a task for tomorrow"*, and suggests an automated Salesforce action.

26. Does Outloud work on mobile?

Yes, Outloud works seamlessly in the Salesforce mobile app. Record, relate, and access voice notes on the go, just like on desktop. Be sure microphone access is enabled on your device.

27. What languages does Outloud support?

Outloud supports transcription and translation in 57 languages. Admins set the default at the Org level, and users can easily switch languages using the gear icon in the Outloud component.



28. Can I choose which AI provider processes my voice notes?

Not at the moment, but it's on our roadmap. In future, we plan to offer the flexibility to choose the AI provider you prefer for processing voice notes

29. What Salesforce objects does Outloud support?

Outloud works with any Salesforce object, standard or custom. Whether you're working with Leads, Opportunities, Cases, Accounts, or custom objects specific to your business, you can record voice notes or trigger actions directly related to those records. The System Admin who will install the app can configure which objects are supported and define how voice notes and commands are connected to each one. This flexibility ensures Outloud fits seamlessly into your unique Salesforce data model and processes.

30. Why isn't my voice note transcribing?

Voice notes may fail to transcribe due to:

- Invalid or missing API key Usage limits being reached
- Low audio quality (e.g., background noise or unclear speech)
- Connectivity or service issues

Admins can use the Note Request Logs to investigate and resolve the issue.

31. What is Dynamic Note Visibility?

This setting controls who can view voice notes:

- ON: Anyone with access to the record can also see its voice notes.
- OFF: Voice notes follow your org's standard sharing rules and object-level permissions.

Admins can toggle this setting at any time.

32. What are Note Request Logs?

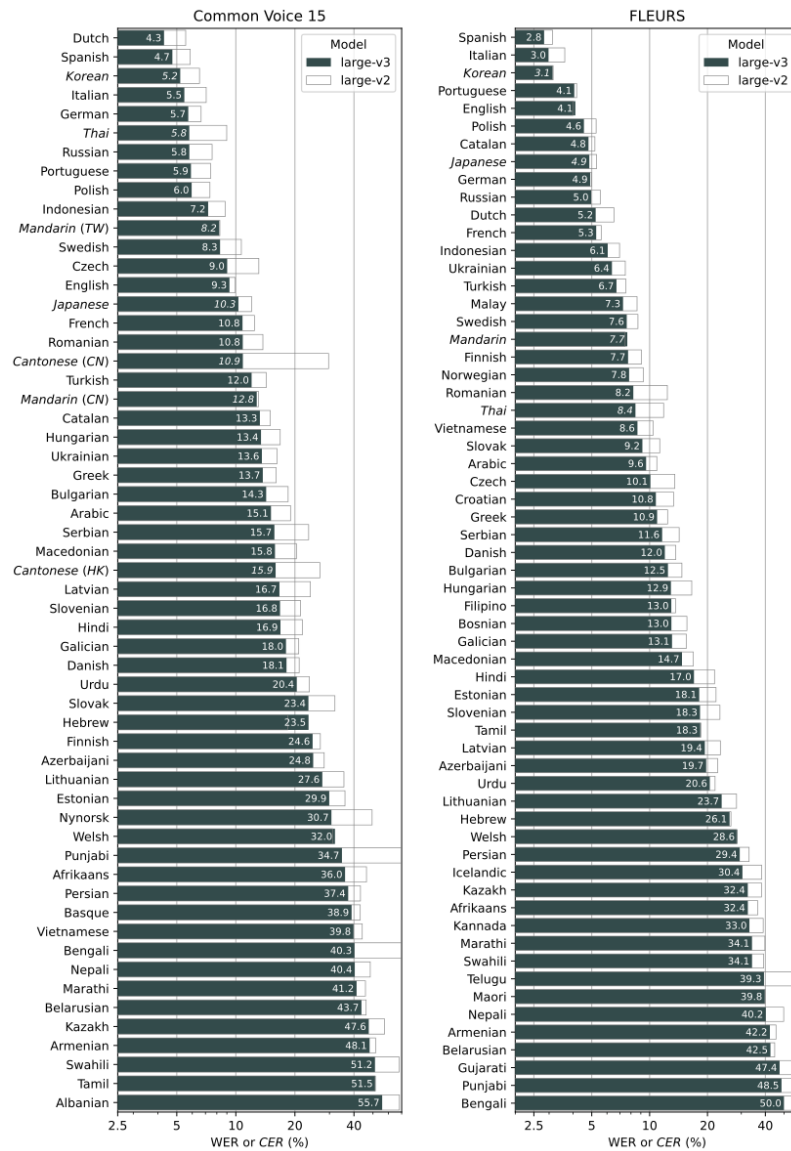
Note Request Logs allow admins to review how each voice note was processed. Logs include:

- Type of request.
- Any errors or status codes.
- Field mappings (in JSON format)

These logs are for transparency and troubleshooting and they don't alter any data.

33. What is the transcription / translation performance for my language?

All of the available languages exceed <50% Word Error Rate (WER), which is an industry standard benchmark for speech to text model accuracy. The figure below shows the base model performance for each language. Lower rating (WER) suggests better performance.





34. What kind of support is available for Outloud?

You can reach us by email at support@robinlabs.io. We also offer detailed documentation for admins and end users. Please read our FAQ before contacting us.