

outloud

Outloud User Guide

Table of Contents

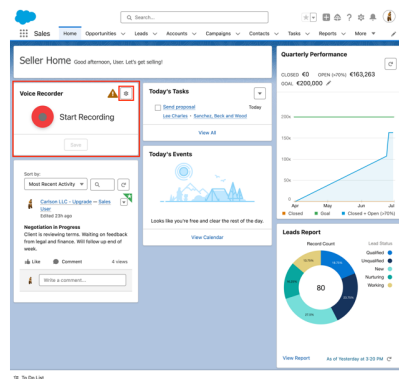
1. How to Record a Voice Note
2. What Happens After Recording
3. Managing Voice Notes
4. Record Sharing
5. Troubleshooting Common Issues
6. Example Use Cases
7. Glossary

1. How to Record a Voice Note

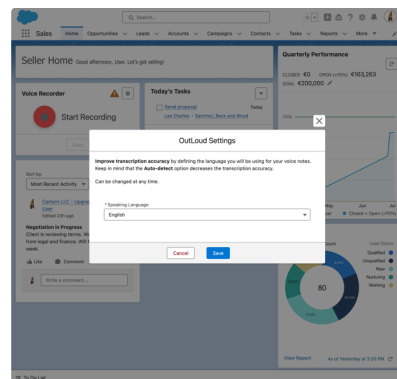
1.1 Before You Start

Set Your Speaking Language (First-Time Setup)

To ensure accurate transcription, set your primary speaking language when you use Outloud for the first time:



A. Click the Settings icon in the upper-right corner of the Outloud Voice Recorder panel.



B. Select your speaking language from the dropdown list.

- The warning icon will disappear once a language is selected.
- You can update this setting anytime from the settings menu.

Additional Setup Requirements

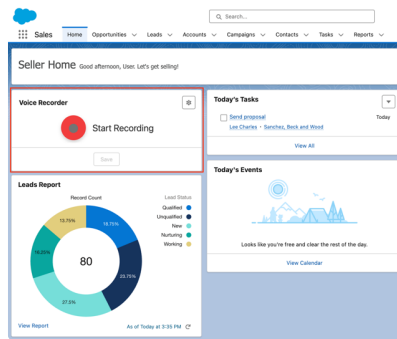
Before recording, make sure:

- Your **browser or mobile app** has microphone access
- You're on a page that displays the **Outloud component** (Record page or Home)
- Your admin has assigned the **Outloud permission set** to your user

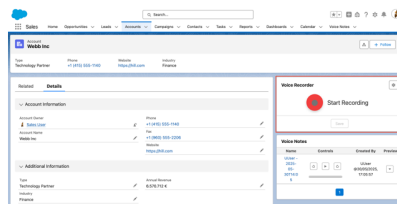
1.2 Recording a Note

1. Locate the Recorder

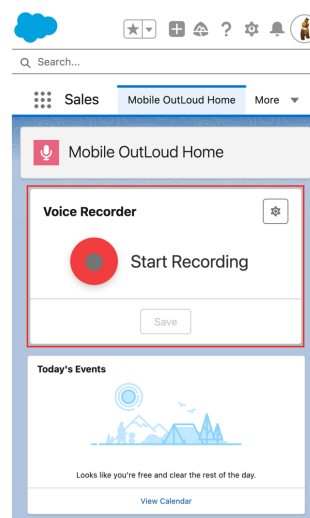
Look for the Outloud panel on any record page or Home Page.



A. On Home Page



B. On Record Pages

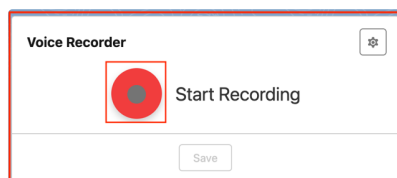


C. On Mobile

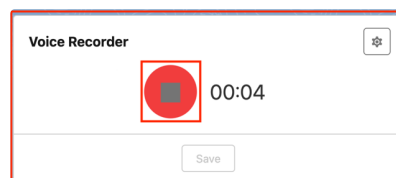
i If the recorder is missing, ask your Salesforce admin to add the Outloud Voice Recorder and Outloud Related Voice Notes components to the layout.

2. Start Recording

Click the red Record button. A timer will appear, indicating that recording is in progress.



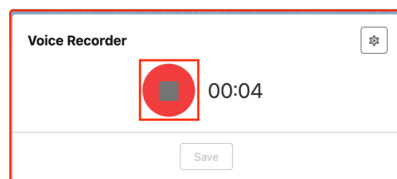
A. Start recording



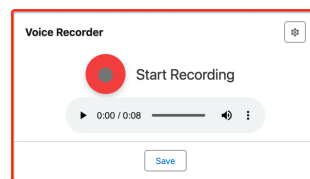
B. Recording in progress

3. Stop Recording

When you're finished, click the Record button again to stop.



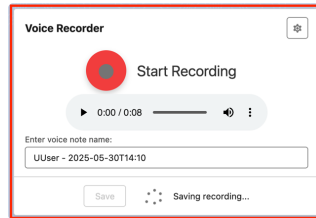
A. Stop recording



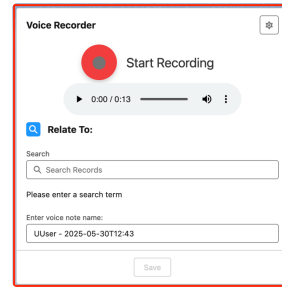
B. Voice Note Player

4. Review and Save

After stopping the recording, you can listen to your voice note to confirm the content and save. If you're using Outloud from the **Home Page**, you will be asked to select the record to associate the voice note with.



A. Save recording



B. Relate Voice Note to a record

💡 Tips for Best Results

- Speak at a moderate pace and avoid background noise
- Use clear commands like “Create task for tomorrow” to trigger action detection
- Don’t close or reload the page until you’ve saved your note

2. What Happens After Recording

2.1 Automatic Transcription

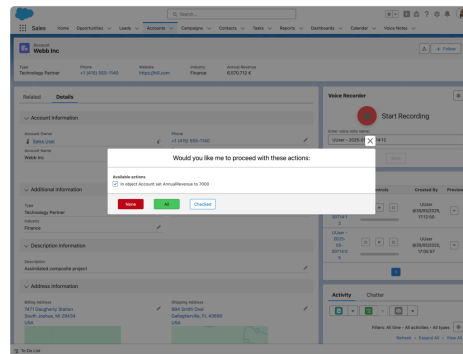
Your voice note is instantly converted into editable, searchable text.

Transcripts can be used for auditing, search, or translation.

2.2 Voice Command Detection

If Outloud detects a supported voice command (e.g. “create a task,” “close the case”):

- A confirmation prompt appears.
- No action is applied without your approval.



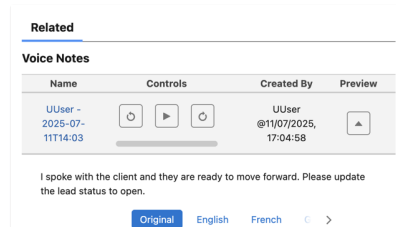
A. Confirmation prompt

💡 Supported Commands

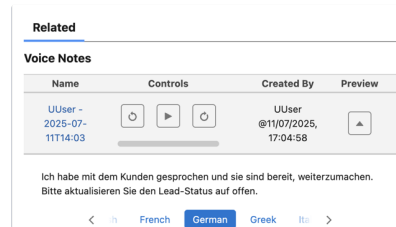
- Update field values on the related record
Example: “Change the stage to Closed Won” (on an Opportunity record)
- Create tasks linked to the related record
Example: “Create a reminder to follow up on the quote”

2.3 Auto Translation

If enabled by your admin, your note is translated into a set of admin-defined languages.



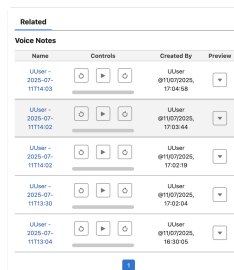
A. Original transcript



B. Auto-translated version (e.g. German)

3. Managing Voice Notes

Saved voice notes for each record appear in the Related Voice Notes component.



A. Related voice notes list

3.1 From the Related Voice Notes component

Each voice note listed in the Related Voice Notes panel includes:

- Playback controls – Listen to the audio directly
- Transcript preview – View translations in available languages
- Manual translation options – Generate translations on demand

A. Playback & Review

Click the **Play** button to listen to the voice note. You can pause, replay, or fast-forward as needed.

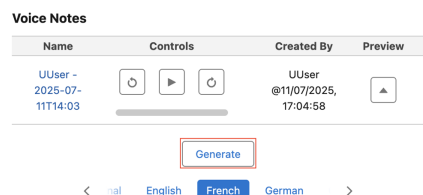


A. Playback controls UI

B. Manual Translation

If a translation is not already available:

1. Select the desired language from the list (e.g. French).
2. Click the **Generate** button to create the translation.



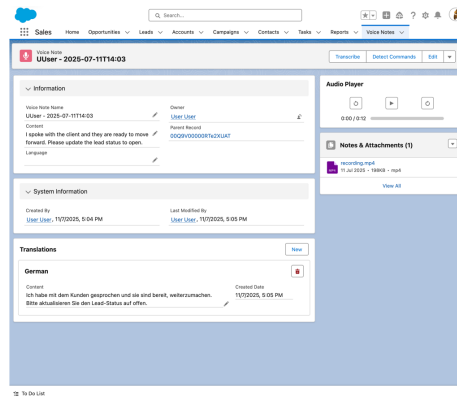
B. Generating a New Language Version

i Supports over 50 languages including Spanish, French, German, Hindi, and Chinese.

! Manual translation options are only available for languages enabled by the admin in the Outloud settings.

3.2 From the Voice Note Record page

Each voice note also has its own detailed record page in Salesforce, where users can view and manage all associated information in one place.



A. Voice Note Record page

A. Information

Includes the voice note name, transcription, and a link to the related (parent) record.

B. Audio Player

Use the built-in player to listen to the voice note. You can play, pause, or scrub through the audio.

C. Notes & Attachments

Lists the original audio file (.mp4) that was recorded.

D. Translations

If translation is enabled, this section shows available translations for the transcript.

4. Record Sharing

Outloud Voice Notes follow Salesforce's standard sharing model. By default, Voice Notes are private, meaning only the creator can view them.

Your Salesforce admin can adjust this behavior by:

- Changing the sharing model to Public Read Only or Public Read/Write
- Defining custom sharing rules to meet your organisation's access requirements

Dynamic Record Sharing

Outloud also supports Dynamic Record Sharing, which allows any user with access to a Salesforce record to view its associated Voice Notes and transcriptions through the Outloud Related Voice Notes component.

- This feature must be explicitly enabled by your admin
- It is disabled by default for added control and flexibility

5. Troubleshooting Common Issues

Problem	Likely Cause	Solution
Cannot record	Microphone access is blocked	Enable mic access in settings and refresh the page

Transcript does not appear	Network issue or transcription delay	Check connection, refresh, or contact your admin
Command not detected	Phrase not recognized	Use clear, supported commands like “create task”
Translation not working	Language not supported or feature disabled	Use manual translation or contact your admin
Outloud not visible	Component not added or permission missing	Ask admin to add Outloud and assign permission set
Cannot save from Home Page	No record selected	Wait for record prompt before clicking Save
Mobile not working	Mic access blocked or mobile layout not configured	Enable mic access and ask admin to configure layout

6. Example Use Cases

Use Case 1: Recording from the Home Page and Manually Linking to a Record

Scenario:

You want to record a quick voice note from the Home Page and associate it with a specific record (e.g. a Lead, Opportunity, or Case).

Steps:

1. Go to the Salesforce Home Page.
2. Locate the Outloud Voice Recorder component.
3. Click the Record button.
4. Speak your note:
Example: “Followed up with Jason Wu. Interested in pricing. Follow up Thursday.”
5. Click again on the Record button to stop.
6. Use the Search Records field to select the appropriate record.
7. Click Save.

Result:

- The voice note is saved and linked to the selected record.
- A transcript is generated automatically.
- No commands are triggered in this example.
- Manual translation is available (if enabled).

Use Case 2: Recording from a Record Page with Command Detection

Scenario:

You record a note directly from a record page. The note is automatically linked and translated.

Steps:

1. Open a Salesforce record (e.g. an Opportunity).
2. Locate the Outloud Voice Recorder component.

3. Click the Record button.
4. Speak your note clearly, including a supported command.
Example: “The client accepted the terms. Please change the stage to Proposal/Price Quote.”
5. Click again on the Record button to stop.
6. Click Save.
7. (Optional) Update the name of the voice recording if needed.
8. Click Save again.
9. A confirmation modal appears showing the detected action(s).
10. To apply the changes:
 - Click All to apply all detected commands, or
 - Select individual commands and click Apply Selected.
11. Refresh the page to view the updated record fields.

Result:

- The voice note is automatically attached to the current record.
- Outloud successfully detects the spoken command (e.g., “change the stage to Proposal/Price Quote”).
- After confirmation, the Opportunity stage is updated automatically based on the detected action.
- The voice note appears in the Related Voice Notes panel for playback, translation, or review.
- Translations (if enabled) are available below the original transcript.

7. Glossary

Term	Description
Voice Note	A recorded audio message saved to a Salesforce record
Transcript	The text version of a voice note generated by Outloud
Command Detection	Feature that detects actions like creating a task or updating a field in your voice note
Outloud Component	The recorder panel visible on record pages, Home Page, or mobile
Outloud Related Voice Notes	The list of saved notes for a record, shown in the Outloud panel
Outloud Management App	Outloud’s administration app