

outloud

Outloud Admin Guide

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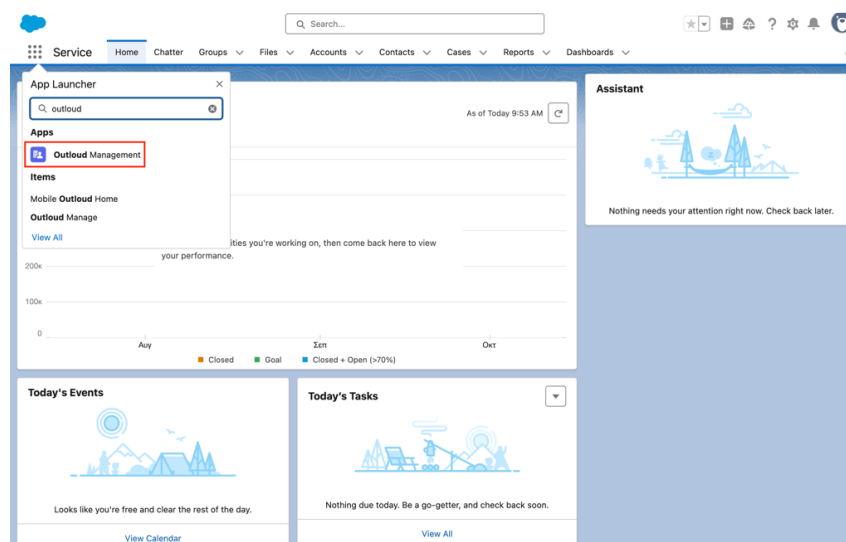
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1. Getting Started

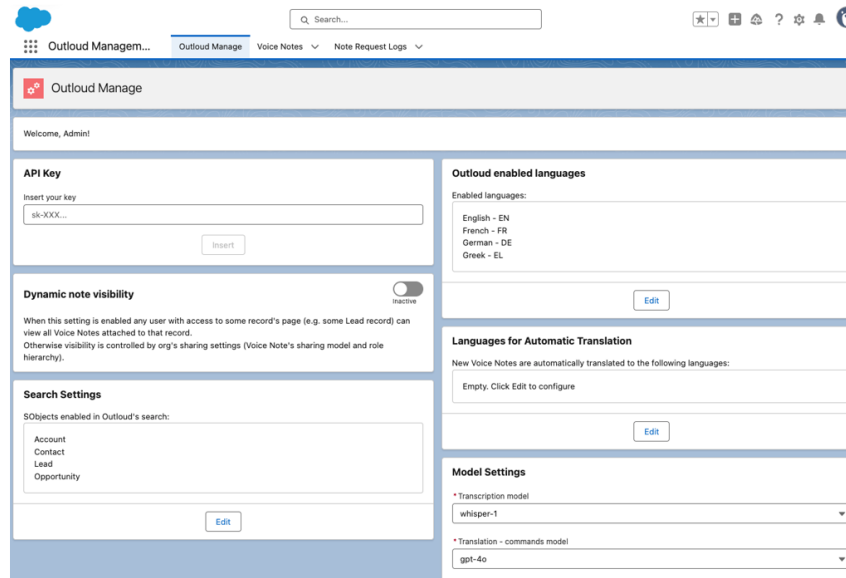
After installing Outloud, you'll need to configure it for your organization. This can be done by a system administrator or any other user who has been assigned the "Outloud Admin" permission set. Before beginning any configuration tasks, ensure that you have the "Outloud Admin" permission set assigned to your user.

To access the configuration settings:

1. Open the App Launcher in Salesforce
2. Navigate to the **Outloud Management App**
3. Click on the **Outloud Manage** tab (default)



Here you'll find all the settings needed to customize Outloud for your organization and make the most out of its features.



The screenshot shows the 'Outloud Manage' settings page. The top navigation bar includes 'Outloud Manage', 'Voice Notes', and 'Note Request Logs'. The main content area is divided into several sections: 'API Key' with a text input field and an 'Insert' button; 'Dynamic note visibility' with a toggle switch set to 'inactive'; 'Search Settings' with a list of objects (Account, Contact, Lead, Opportunity) and an 'Edit' button; 'Outloud enabled languages' with a list of languages (English - EN, French - FR, German - DE, Greek - EL) and an 'Edit' button; 'Languages for Automatic Translation' with a text input field and an 'Edit' button; and 'Model Settings' with two dropdown menus for 'Transcription model' (whisper-1) and 'Translation - commands model' (gpt-4o).

Settings Overview

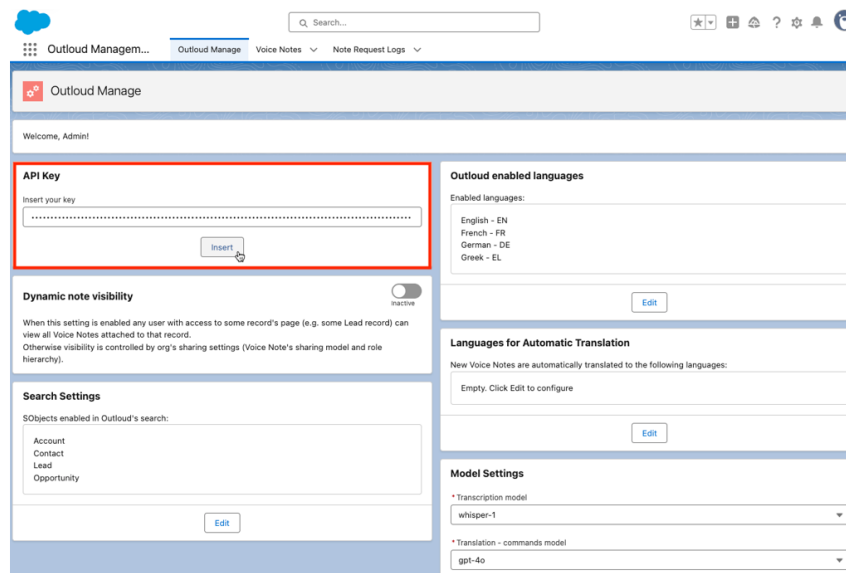
2. Essential Configuration

2.1 OpenAI API Key Setup

What you need to know: Outloud requires an OpenAI API key to function. This key enables all AI features (transcription, translation, command detection).

How to configure:

1. **Get your API key:** If you don't have one yet, [create an OpenAI API key](#).
2. **Enter your key:** Paste your API key in the field at the top left of the page

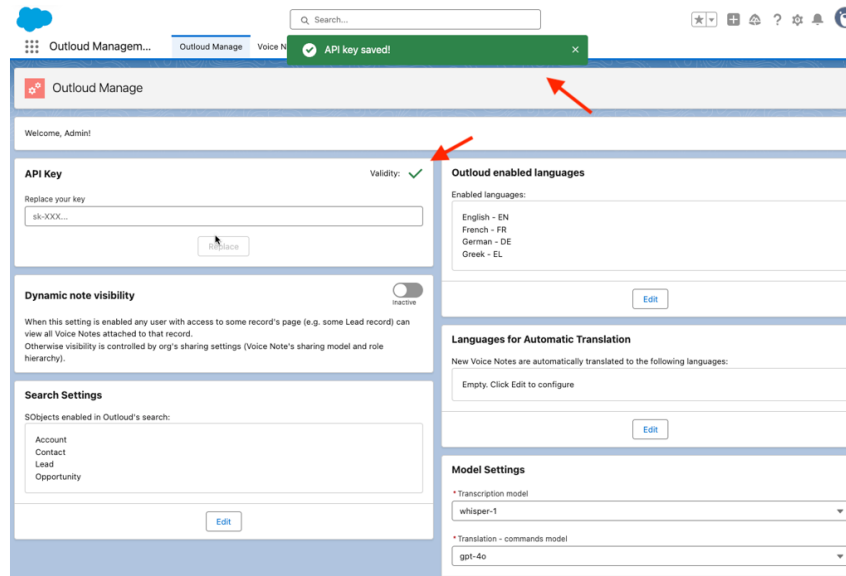


This screenshot is identical to the one above, but with a red rectangular box highlighting the 'API Key' section. The box encompasses the 'Insert your key' text input field and the 'Insert' button below it.

Inserting the API key

3. **Save it:** Click the **Insert** button
4. **Verify success:** You should see:

- A success message at the top of the page
- "Validity: ✓" next to the API Key setting



Key is saved and validity is checked

Important notes:

- Your API key is securely stored in your Salesforce org using Named Credentials
- Outloud automatically validates your key when you enter it
- You can replace your key at any time if needed
- To re-check your key's validity later, click the validation icon (✓)

API Key Replacement Permissions: By default, Outloud admin users who are not system administrators cannot replace an API key that was created by another user. If you need to grant this permission to your Outloud administrators:

1. Create a new permission set in Salesforce
2. Grant **"Modify All"** permission on **External Credentials**
3. Assign this permission set to your Outloud administrators

This will allow them to replace API keys created by other users when necessary.

2.2 Search settings

Purpose: Define which Salesforce objects Outloud can search when users want to attach voice notes to records.

When this matters: When users create voice notes from non-record pages (like the Sales home page) and want to link them to specific records (like Opportunities or Accounts).

Voice Recorder

Start Recording

0:00 / 0:06

Relate To:

Search

Search Records

Please enter a search term

Enter voice note name:

UUser - 2025-07-15T09:45

Save

How to configure: Select the object types that your users commonly work with and might want to attach voice notes to.

Outloud Management

Search...

Welcome, Admin!

API Key Validity: ✓

Replace your key

sk-XXX...

Replace

Dynamic note visibility ☐ inactive

When this setting is enabled any user with access to some record's page (e.g. some Lead record) can view all Voice Notes attached to that record. Otherwise visibility is controlled by org's sharing settings (Voice Note's sharing model and role hierarchy).

Search Settings

SObjects enabled in Outloud's search:

Account
Contact
Lead
Opportunity

Edit

Outloud enabled languages

Enabled languages:

English - EN
French - FR
German - DE
Greek - EL

Edit

Languages for Automatic Translation

New Voice Notes are automatically translated to the following languages:

Empty. Click Edit to configure

Edit

Model Settings

* Transcription model

whisper-1

* Translation - commands model

gpt-4o

Cancel Save

2.3 Lightning Web Security

For Outloud components to function properly, you must enable the Lightning Web Security setting in your organization. This setting can be found by navigating to Setup > Security > Session Settings.

Lightning Web Security

☒ Use Lightning Web Security for Lightning web components and Aura components

Enable Lightning Web Security

⚠️ Do not skip this step. Without Lightning Web Security on, voice recording doesn't work.

3. Optional Configuration

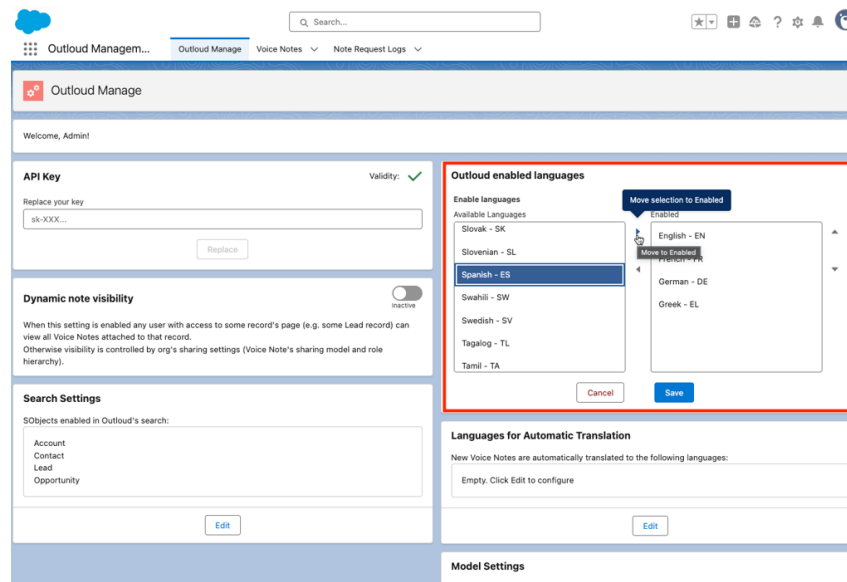
3.1 Language Settings

Available Languages for Users

Purpose: Control which languages your users can select for transcription and translation.

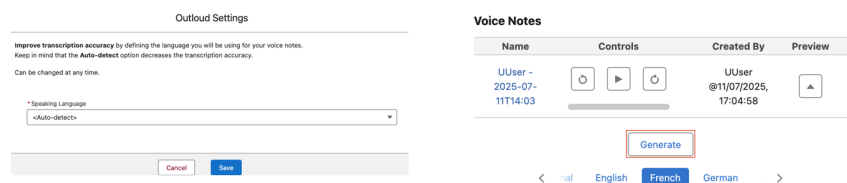
How to configure:

1. Locate the **Outloud enabled languages** section (next to API key settings)
2. Select only the languages your organization actually uses
3. This will narrow down the language options for your users and reduce confusion



What this affects:

- Language options in the “speaking language” setup menu (see the **Outloud User Guide**)
- Languages shown in the Related Voice Notes component



3.2 Automatic Translation Languages

Purpose: Set up automatic translation for new voice notes.

How to configure:

1. In the **Languages for Automatic Translation** section, select the languages you want
2. Outloud will automatically generate translations in these languages for every new voice note
3. **Note:** If you need a language that doesn't appear in the list, first enable it in the "Outloud enabled languages" setting above

The screenshot shows the 'Outloud Management' interface with a top navigation bar containing a search bar and user profile. The main content area is divided into several panels:

- API Key:** A panel with a 'Replace your key' input field and a 'Replace' button. It shows 'Validity: ✓'.
- Dynamic note visibility:** A panel with a toggle switch currently set to 'inactive'. It includes a description: 'When this setting is enabled any user with access to some record's page (e.g. some Lead record) can view all Voice Notes attached to that record. Otherwise visibility is controlled by org's sharing settings (Voice Note's sharing model and role hierarchy).'.
- Search Settings:** A panel with a list of 'Objects enabled in Outloud's search:' including Account, Contact, Lead, and Opportunity. It has an 'Edit' button.
- Outloud enabled languages:** A panel showing 'Enabled languages:' as a list: English - EN, French - FR, German - DE, Greek - EL. It has an 'Edit' button.
- Languages for Automatic Translation:** A panel highlighted with a red border. It contains two lists: 'Available Languages' (English - EN, French - FR, German - DE, Greek - EL) and 'Selected Languages' (empty). Arrows indicate movement between the lists. It has 'Cancel' and 'Save' buttons.

3.3 Dynamic note visibility

Default behavior: Voice notes use a private sharing model – users can only see their own notes and notes created by their subordinates in the role hierarchy.

What Dynamic Note Visibility does: When enabled, any user who has access to a record (like an Account) can preview all voice notes attached to that record, regardless of who created them.

When to enable this:

- Enable if you want team collaboration on voice notes
- Keep disabled if you prefer private note-taking

3.4 Model Settings

Purpose: Choose which AI model Outloud uses for processing voice notes.

What this affects:

- Transcription accuracy
- Translation quality
- Voice command detection
- API key usage cost

How to configure: Select your preferred model from the available options based on your organization's needs and budget considerations.