



Voice Assist for Salesforce

Installation Instructions

There are 2 parts to setting up the Voice Assist for Salesforce service. Part 1 is installing the App into your Salesforce Organization. Part 2 is creating a Voice Assist account and then linking it to the Salesforce Account.

Part 1 - Installing the Voice Assist for Salesforce App

The System Administrator needs to install the App into your Salesforce Organization, using the Salesforce install wizard, and assign a Voice Assist for Salesforce license to each person who is going to use it.

Part 2 - Setting up the Voice Assist accounts

Each person who will be trialing Voice Assist for Salesforce service will need their own Voice Assist account. Setting it up is easy.

1. [Click on this link to activate your free 30 day trial](#)
 - i. Complete the sign-up page.
 - ii. Your Voice Assist account works with both your personal contacts as well as your Salesforce contacts. If you just want to use Voice Assist for your Salesforce contacts then you can skip 'building your Voice Assist Address Book'.
 - iii. Next add your email information.
 - iv. You are now set up! Press 'sign in' on the upper right hand part of the web page.
2. Once you have signed in:
 - a. Click on the 'Services' tab.
 - b. Click on the button, 'Link to Chatter'. You will be taken to the Salesforce authentication page.
 - i. Click 'Allow'.
 - ii. You will then be directed back to the 'Services' page and the button will now show 'unlink'. That means that your accounts are now linked together.
3. Now go to the 'Settings' tab on the Voice Assist website and Click on 'phones'
 - a. Input the numbers of the phones you will be using to call into Voice Assist and press 'update phones'.

- b. You can use mobile and landline phones with Voice Assist
- 4. Next, you want to set up your mobile and or landline phone(s).
 - a. Add Voice Assist as a contact to the phone(s) you will be using.
 - b. We recommend adding Voice Assist to your speed dial or as a favorite.
- 5. You are now ready to use Voice Assist for Salesforce! Check our quick reference guide for a list of voice commands you can say.

Trouble Shooting

If you have problems with installing the APP, linking the accounts, or are not able to access the service by phone, check the suggestions below. If you still have an issue, please call us at **949-954-5700** and we'll be happy to help you.

Symptom	Check
When you try to link your Voice Assist account to your Salesforce account it will not link.	Make sure API access is enabled for your Salesforce Organization.
When you call in, the system says that you cannot connect to Salesforce.	Check whether your Salesforce Organization restricts API access by IP. If so, please contact us and we'll be happy to provide our IP ranges

Using your Voice Assist for Salesforce Account

Dial into Voice Assist **949-257-0923** from your phone.

- a. The Voice Assist attendant will answer the phone by saying "Voice Assist".
- b. You can now say a command.

NOTE: If Voice Assist asks you for your phone number and PIN when you call and you expect to call in from this number frequently, add it to your "Phones" list in Voice Assist. When a phone number is on your "Phones" list it will automatically log you in when you call from this number.

Voice Assist for Salesforce Commands

“Make a Salesforce Call” – allows you to call any of your most recent 4,000 leads and/or contacts by voice. When the person you dialed on the far end hangs up you will be automatically directed to ‘Log a Call’ by voice for the lead or contact you just called. If the person you called does not hang up or if you leave a voicemail, you will need to press ## in order to be directed to ‘Log a Call’ by voice.

“Log a Salesforce Call” – this allows you to record notes about a call after the fact.

“Create Task” – allows you to create a task for an account or an opportunity.

“Create Event” – allows you to create an event for an account or an opportunity.

“Update Account” – allows you to add notes and add a follow-up task.

“Update Opportunity” - allows you to add notes, update close date and update stage.

“Create a New Opportunity” – allows you to create a new opportunity from an existing account.

Chatter specific commands

“Post to Chatter” – allows you to post to your Chatter feed.

“Post to Chatter Opportunity” – allows you to post to your Chatter Opportunity feed.

“Post to Chatter Group” – allows you to post to your Chatter Group feed.

“Post to Chatter Account” – allows you to post to your Chatter Account feed.

“Listen to Chatter” – allows you to listen to your Chatter feed.

“Listen to Chatter Opportunity” – allows you to listen to your Chatter Opportunity feed.

“Listen to Chatter Group” – allows you to listen to your Chatter Group feed.

“Listen to Chatter Account” – allows you to post to your Chatter Account feed.

You can also give the command to **“Repeat”** or **“Comment”** when listening to a Chatter Account feed.

Using Voice Assist for Salesforce Example

Example: *Create Task for an opportunity*

- a. Dial into Voice Assist **949-257-0923**
- b. Say the command, **“Create Task”**.
- c. The Voice Assist attendant will ask if it is for an account or opportunity.
- d. Say **“Opportunity”**.
- e. The Voice Assist attendant will ask you which opportunity is it for.
- f. Say **“Angela’s Flowers”**.
- g. The Voice Assist attendant will ask you what the task name is.
- h. Say **“Call Angela about the Howard wedding”**
- i. The Voice Assist attendant will ask you to record comments about the task.
- j. Say **“Discuss the flower arrangement for the Howard wedding with Angela”**. (You will have up to 2 minutes of talk time to add comments).
- k. The Voice Assist attendant will ask you which day is it due.
- l. Say **“September 20”** or you can say phrases like **“Tomorrow”**, **“Next Tuesday”**
- m. The Voice Assist attendant will ask you if you would like to post, listen to, or rerecord this task.
- n. Say **“Post”**.
- o. Your task has now been created!

Voice Assist Commands

The Voice Assist service has 2 components, the Salesforce features and standard features. Salesforce features work with the Salesforce service, and the standard features work with the Voice Assist Address book and are configured on the Voice Assist web site. This allows you to keep your business and personal contacts separate.

“Make a Call to <name in Voice Assist Address book>”

“Send a Text to <name in Voice Assist Address book>”

“Send an Email to <name in Voice Assist Address book>”

“Read my Email”

“Post to Facebook”, “Post to Twitter”

Any questions? Please contact us at 949 954 5700 or email us at salesforce@voiceassist.com