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# Lightning Voice Implementation Guide

Salesforce, Spring '17





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# SET UP VOICE

Voice allows users to access telephony features directly in Salesforce.

To use Voice in your org:

## [Voice Prerequisites](#)

Plan out your implementation before enabling Voice in your organization.

## [Enable Voice](#)

Turn on Voice from the Voice Settings page in Lightning Experience.

## [Add Voice to the Utility Bar](#)

Use the App Manager to make Voice available from the utility bar at the bottom of the page. The utility bar gives your sales reps quick access to commonly used tools.

## [Create a Permission Set with Voice Features](#)

Assign the Voice app permissions with a custom permission set.

## [Assign the Voice Permission Set to Users](#)

Assign the Voice licenses to users from Setup.

## EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

Voice is available for an additional cost as an add-on license.

## Voice Prerequisites

Plan out your implementation before enabling Voice in your organization.

Having a dedicated network for your Voice calls is best. We recommend having at least 10 kbps per Voice session available, but having 500 kbps+ per Voice session is optimal.

The supported browsers for Voice include the most recent versions of Chrome, Firefox, and Edge. You also need open ports on your computer and network firewalls for Voice to work. Make sure that the following ports aren't blocked:

- TCP: port 80 and 443
- UDP: all ports between 10,000 and 60,000

 **Note:** Voice should not be assigned to users already using Open CTI.

To disable Open CTI for users, from Setup, enter *Users* in the **Quick Find** box, then select **Users**. Then deselect the **Call Center** field for Voice users.

The Voice product currently includes the following limitations:

- Voice features are available in Lightning Experience on the desktop only.
- Phone numbers in reports and dashboards can't be directly called with Voice.
- Outgoing calls are supported to the U.S. and Canada only.
- Every license is allowed one dedicated number. To change it, an admin can release the number, and the Voice user can then reassign themselves another number. Admins can release and replace, at most, a single number for each user each month.
- If your org has record types enabled for tasks, you need to [assign the Log a Call quick action to a specific record type](#) in order to log calls.
- Phone numbers are subject to availability, and numbers from all area codes may not be available.

Before beginning the implementation process, Salesforce must enable Voice permissions and provision Voice licenses for your organization. Your Salesforce contact coordinates it with you, but you can check if your organization has available Voice licenses. In Setup, enter *Company Information* in the **Quick Find** box, then select **Company Information**, and check for **Voice Outbound User**, **Voice Minutes**, and **Voice Inbound User** under Permission Set Licenses.

For information about using Voice in a sandbox environment, see [Test Voice Features in Sandbox](#).

### EDITIONS

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### USER PERMISSIONS

To enable Voice features:

- "Customize Application"

To assign permission sets:

- "Assign Permission Sets"

To manage users:

- "Manage Users"

AND

"Manage Profiles and Permission Sets"

## Enable Voice

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Turn on Voice from the Voice Settings page in Lightning Experience.

1. From Setup, enter *Voice Settings* in the Quick Find box, then select **Voice Settings**.
2. Enable Voice.

Optionally, enable personal voicemail and prioritized call lists for your org as well.

## Add Voice to the Utility Bar

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Use the App Manager to make Voice available from the utility bar at the bottom of the page. The utility bar gives your sales reps quick access to commonly used tools.

1. From Setup, enter *App Manager* in the Quick Find box, then select **App Manager**.
2. Edit an existing Lightning app or click **New Lightning App**. You can also upgrade a custom Classic app to a Lightning app.  
If available, the Lightning Sales app contains numerous options preconfigured for sales users.
3. On the Utility Bar tab, click **Add** and select **Voice**.
4. On the Assign to User Profiles tab, make the app available to relevant user profiles.
5. Verify the other app details, including the app name, branding information, and available menu items.
6. Save your changes.

To verify your changes, click the App Launcher and select the app that has Lightning Voice enabled.

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### USER PERMISSIONS

To enable Voice features:

- “Customize Application”

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### USER PERMISSIONS

To enable Voice features:

- “Customize Application”

## Create a Permission Set with Voice Features

Assign the Voice app permissions with a custom permission set.

1. From Setup, enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**.
  2. Click **New**.
  3. Enter a name for the permission set.  
Naming it *Voice* makes it easy to identify.
-  **Note:** The **License** dropdown should have **None** selected. Don't select a specific user license for the permission set.
4. Click **Save**.
  5. Click **App Permissions**.
  6. Click **Edit**.
  7. Select **Access Voice Minutes**, **Access Voice Outbound Calls**, and (if available) **Access Voice Inbound Calls**.
  8. Click **Save**.

If your Voice users have custom profiles, they won't be able to assign themselves phone numbers without the **View Setup and Configuration** permission. Enable it through the custom profile or Voice permission set under **Administrative Permissions** or **System Permissions**.

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### USER PERMISSIONS

To create permission sets:

- Manage Profiles and Permission Sets

## Assign the Voice Permission Set to Users

Assign the Voice licenses to users from Setup.

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Select a user.
3. In the Permission Set License Assignments related list, click **Edit Assignments**.
4. Assign the Voice Minutes, Voice Outbound User, and (if available) Voice Inbound User licenses and click **Save**.
5. In the Permission Set Assignments related list, click **Edit Assignments**.
6. Add the Voice permission set under Enabled Permission Sets and click **Save**.
7. Repeat the process for other users you want to grant Voice access to.

The number of permission sets you can assign is limited by the number of feature licenses you've purchased.

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### USER PERMISSIONS

To assign permission sets:

- "Assign Permission Sets"



# HOW DO I MANAGE VOICE USAGE?

See your org's Voice usage from Setup.

From Setup, enter *Usage Report* in the **Quick Find** box, then select **Usage Report**.

The page displays your org's total minutes used this month and last month. You can view usage by date, and also sort and filter the usage data.

## [Release a Voice Number](#)

Release a number from the Number Management page in Setup.

## [Test Voice Features in Sandbox](#)

Test Voice in a sandbox environment by re-enabling the feature in a full sandbox org. Calls placed in a sandbox are test calls, and phone numbers aren't actually dialed.

## [Voice Troubleshooting Tips](#)

Make sure your environment is set up to use Voice, and you have the most recent version of Chrome, Firefox, or Edge.

### EDITIONS

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## Release a Voice Number

Release a number from the Number Management page in Setup.

Once you release a number, it can't be recovered. You can still access calling data, but you can't make calls with the number. Admins can release, at most, a single number for each user each month.

1. From Setup, enter *Number Management* in the **Quick Find** box, then select **Number Management**.
2. Click  next to a number.
3. Click **Release**.

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### USER PERMISSIONS

To enable Voice features:

- "Customize Application"


## Test Voice Features in Sandbox

Test Voice in a sandbox environment by re-enabling the feature in a full sandbox org. Calls placed in a sandbox are test calls, and phone numbers aren't actually dialed.

If you have an org with Voice enabled, you can test some Voice features in a sandbox environment. You can place fake outbound calls in sandbox. Inbound calls are not supported.

1. Create a [full sandbox](#) of your Voice org.
2. Log in to your sandbox.
3. From Setup, enter *Voice Settings* in the Quick Find box, then select **Voice Settings**.
4. Toggle the Voice setting off, then back on again.
5. Finish [setting up Voice](#) in your sandbox org.

If you haven't finished setting up Voice, this includes adding Voice to the utility bar, creating a Voice permission set, and assigning the permission set to users.

 **Note:** When selecting phone numbers in sandbox, each user can choose from the same list of dummy numbers. An error may occur if multiple users are assigned to the same phone number.

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### USER PERMISSIONS

To enable Voice features:

- "Customize Application"

To view a sandbox:

- "View Setup and Configuration"

To create, refresh, activate, and delete a sandbox

- "Manage Sandbox"

## Voice Troubleshooting Tips

Make sure your environment is set up to use Voice, and you have the most recent version of Chrome, Firefox, or Edge.

Problem	Potential Solutions
I can't make a call.	<ul style="list-style-type: none"> <li>• Make sure you have a network connection.</li> <li>• Make sure you've granted your browser permission to access your microphone.</li> <li>• Check that Voice is properly set up in your org. For more information about initial set up, see "Voice Prerequisites" in the Salesforce Help.</li> </ul>
The audio is dropping in-and-out of my call.	Check the quality of your network connection. It's best to use a high speed or separate network for calling activity, or to prioritize Voice traffic on your network.
I'm getting one-way audio (on either end).	<ul style="list-style-type: none"> <li>• Make sure your microphone and speaker are attached and enabled, and that your microphone isn't muted.</li> </ul>

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**Problem****Potential Solutions**

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The audio quality is poor on my call.

- Check that you have opened the correct ports in your computer and network firewalls.
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- Use a wired USB headset over wireless or mobile headphones.
  - Try to reduce the noise in your area, and take calls in a quiet location.
  - Adjust the microphone and speaker volume settings.
  - If you're using a wireless connection, switch to a hardwired connection with adequate bandwidth.
  - Close extra applications and browser tabs to make sure your computer has enough resources to make a quality call.
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