Visual Remote Assistant for Salesforce

Installation & Configuration Manual

Release (256), Summer ’25

@salesforcedocs

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CONTENTS

WELCOME TO VISUAL REMOTE ASSISTANT for SALESFORCE

Visual Assistant Powered by AI and AR for Contact Centers and Field Services

Virtual Remote Assistant

Visual Remote Assistant enables contact center agents and field technicians to visually engage with end users via their smartphone cameras, without the need to download an app or use an SDK. This allows the visual diagnosis and fast resolution of issues using Augmented Reality (AR) annotations overlaid on photos or video streams.

By accepting a remote visual session, the customer can ‘transport’ their equipment via the smartphone camera, enabling the agent to act as a virtual technician. By transforming the interaction from a case of “tell me what you see” to “show me the problem,” Visual Remote Assistant enables the agent to provide effective guidance as if they were standing right next to the end user.

Visual Assistant technology is based on Artificial Intelligence (AI) and Computer Vision technologies that automatically identify devices and their statuses to provide issue resolution content that can be shared with the customer with a single click.

Visual Remote Assistant and Salesforce

Empower your organization with Visual Remote Assistant for Salesforce, available for various Salesforce Clouds. Visual Remote Assistant is integrated directly into the Salesforce console making it easy to initiate a live video session from Salesforce components, such as Work Order, Case, Care Plan ID, Lead or others. Salesforce Agents deliver interactive AR remote support right from Salesforce’s dashboard with the industry’s first live video support solution powered by AI and AR, without the need to download any app or use an SDK on the end user side.

Visual Remote Assistant allows Salesforce Agents and remote Experts to see what their end users see and guide them to resolutions, while keeping Salesforce information available simultaneously and creating visual Assistant assets, attached to the Salesforce case.

The current version of Visual Remote Assistant includes new, and powerful features, such as Two-way Video, Multi-Language support for end users, Digital Engagement, Einstein Bot, embedded Actions and Recordings. The Visual Remote Assistant emphasis is shifting from *Push Topics*, to *Platform Events framework*.

To get started with the current version of Visual Remote Assistant, do one of the following:

- If you have a previous version of Visual Remote Assistant installed, begin with *Upgrading from Visual Remote Assistant*
- If you do not have a previous version of Visual Remote Assistant installed, begin with *Installation* on page .

It is mandatory to start with the instructions relevant to your situation, and to follow them carefully.

LICENSING FOR VISUAL REMOTE ASSISTANT 4.0 OR NEWER

It is mandatory to have a Remote Expert license provisioned in your Salesforce Org for using Visual Remote Assistant.

Licensing Mechanism

Please follow the guidelines in section Permission Assignments for Visual Remote Assistant in order to apply the licensing configuration properly.

Acquiring a Visual Remote Assistant Remote Expert License

Obtaining a license is feasible via contacting Salesforce and purchasing a license directly for Visual Remote Assistant.

Visual Remote Assistant Support

If you need any support with Visual Remote Assistant setup & configuration, please contact us at Salesforce Support and open a **Salesforce Visual Remote Assistant** ticket.

PACKAGE INSTALLATION PREREQUISITES

Before installing the app, users need to enable **My Domain** in a Salesforce instance.
As the **My Domain** is mandatory to use lightning aura components, please follow the below document to setup the same.

https://developer.salesforce.com/docs/atlas.en-us.externalidentityImplGuide.meta/externalidentityImplGuide/external_identity_set_up_my_domain.htm

- We have configurations available for different business needs for multiple objects.
- We support lightning experience currently.

In order to configure and customize the managed package, you will find a Visual Remote Assistant Configuration tool that will guide you through the setup process, step-by-step.

IP Restriction Handling

In case IP Login Range restrictions are enabled for your account, please whitelist the following IP addresses to allow VRA to run on your Salesforce organization:

- IP address for AWS Europe region:

  34.240.157.183

- IP for AWS North America:
  54.83.1.114
  3.23.41.216

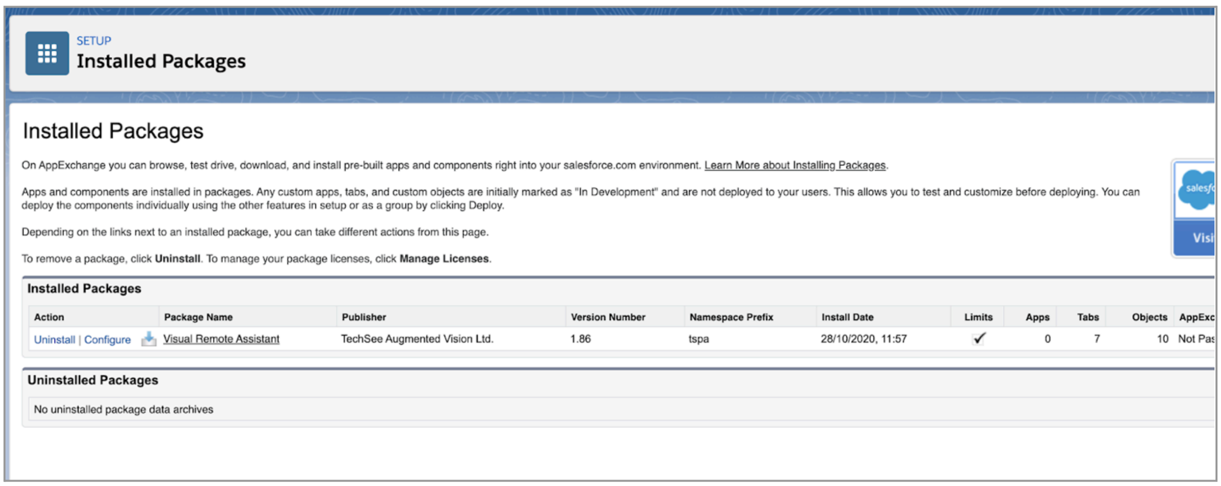
INSTALLATION

In Salesforce, users can install the latest package/App in a Salesforce instance.

Perform the following steps:

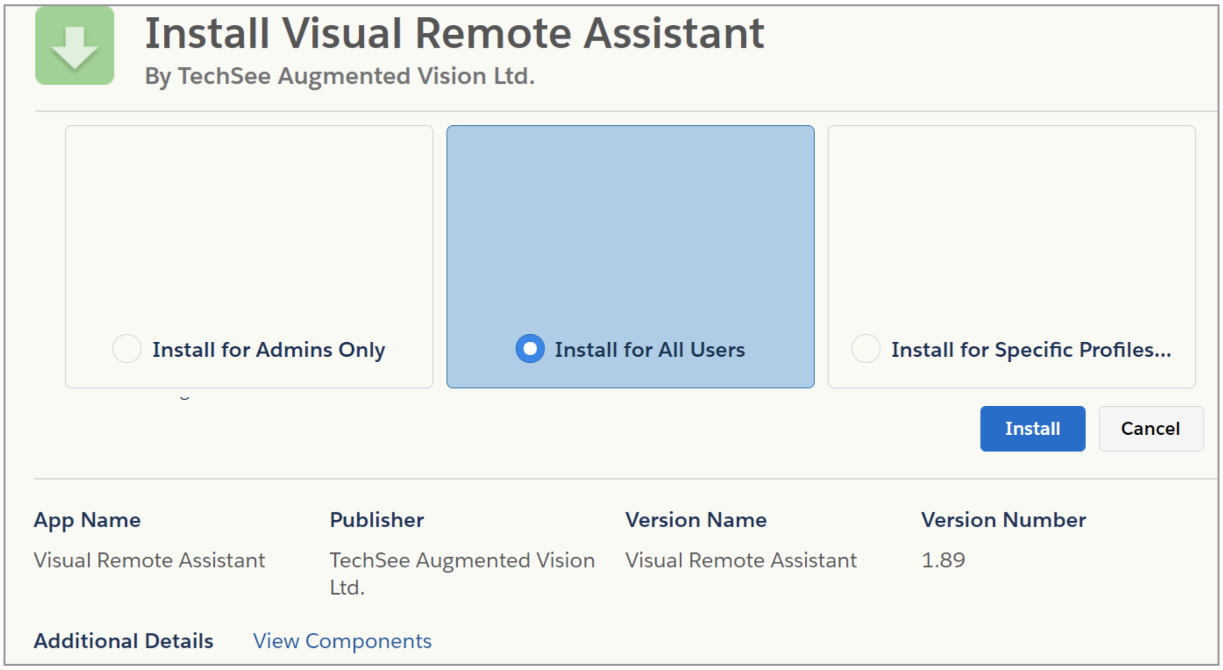
1. Open a browser and enter the installation URL: https://sfdc.co/visualremoteassistant-install
   The **Salesforce Login** page opens.
2. Enter your credentials and click **Login**.
3. Select **Admin/Users/Profiles** as per the requirement.
4. Click **Done**.

The installed app can be found in **Setup** → **Installed Packages.**



To access a general description of the package installation use this link :

[Install a Package]



Notes:

- **Install for Admin Only**: When selecting this option it is necessary to set the appropriate user and object permissions on the custom profiles. This is relevant for the Enterprise, Performance, Unlimited or Developer editions. This setting must be done manually.
- **Install for All Users**: Use this option if the Visual Remote Assistant is available to all users.
- **Install for Specific Profiles**: Use this option for profiles which are already defined where the use of Visual Remote Assistant is limited to these profiles.

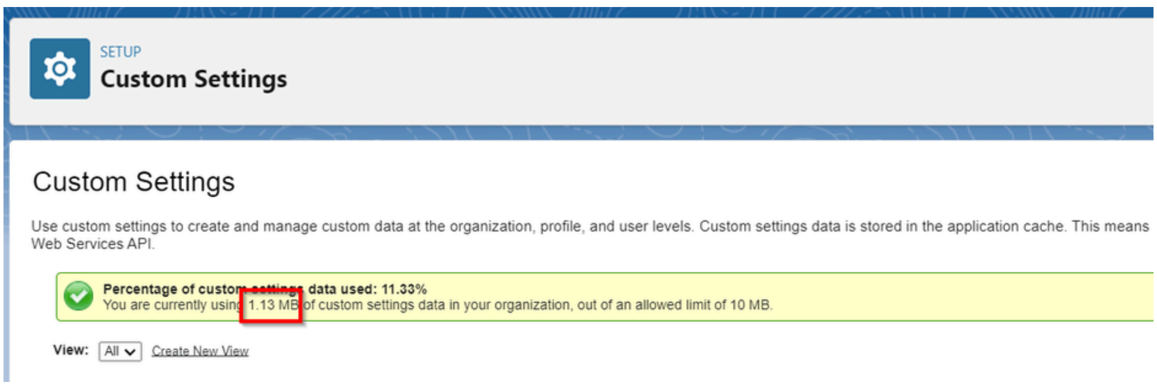
Custom Settings Limits

When working with custom settings, be aware of the following considerations and limits on the amount of cached data.

- Custom settings are a type of custom object. Each custom setting counts against the total number of custom objects available for your organization.
- The total amount of cached data allowed for your org is the lesser of these two values:
  - 10 MB
  - 1 MB multiplied by the number of full-featured user licenses in your org

For more information click here - Custom Settings Limits and Considerations.

The Visual Remote Assistant package requires ~**1.13 MB** of free space on the custom settings and contains 25 custom objects.



For more information regarding Salesforce Features and Edition Allocations click here.

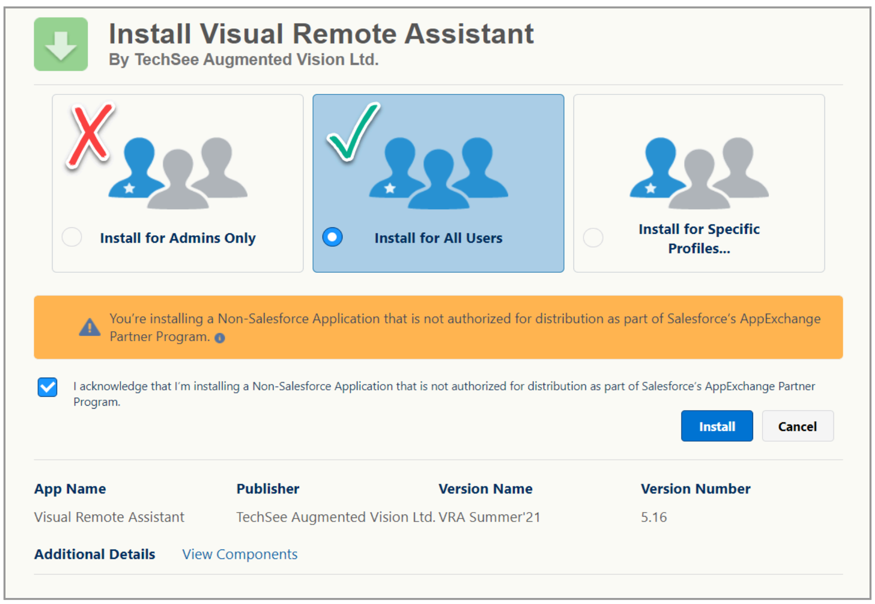
Manually Configure VRA for a Profile

Introduction

To install the Visual Remote Assistant, select the **Install for All Users** option.

Note: If **Install for Admins Only** is selected, VRA will work for users with **System Administrator** profile only. Any other profile will require manual configuration as described in this article.

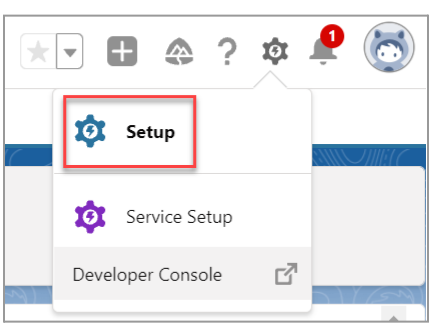
Make sure to install the latest VRA version from the official URL: https://sfdc.co/visualremoteassistant-install.



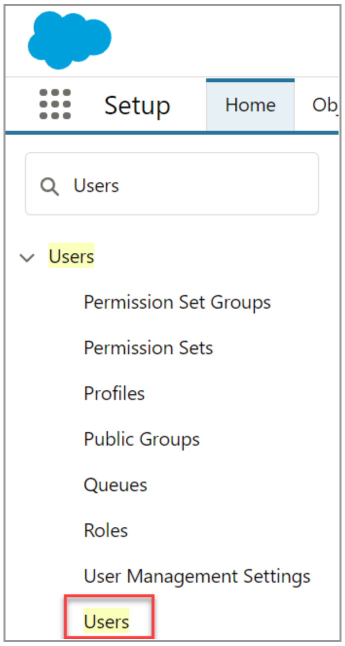
Prerequisites

To configure a profile to be used with VRA, the user is required to set specific settings on this profile. Proceed as follows:

1. Click on the settings icon at the top right-hand corner of the Salesforce window and click on **Setup**.



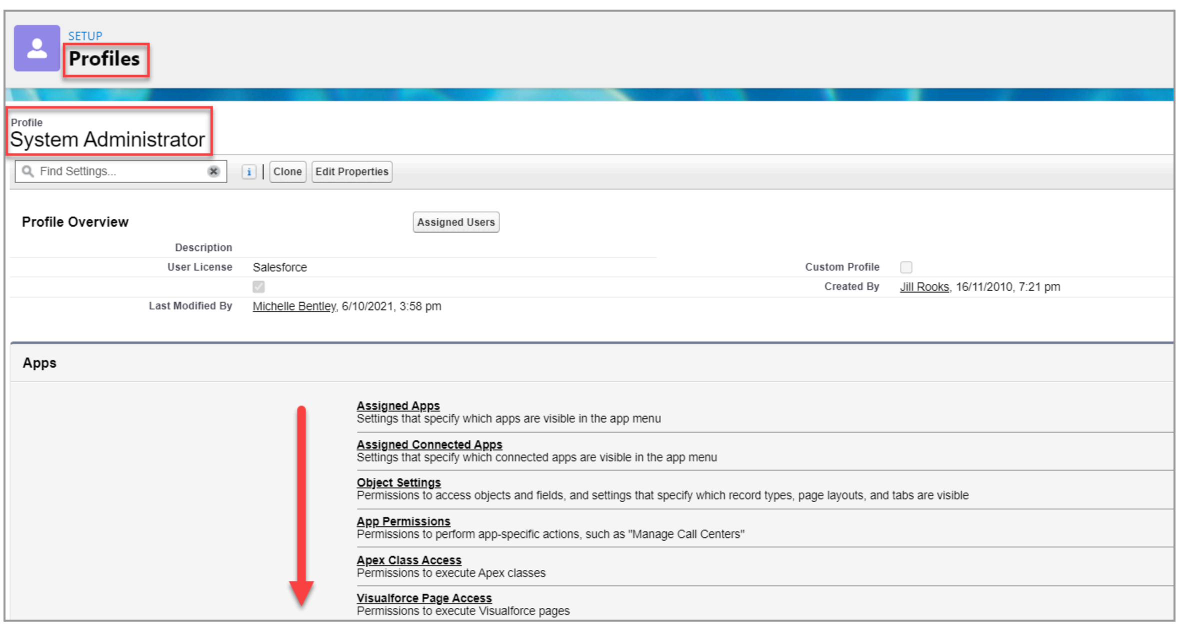
2. From the **Quick Find** in the left side panel, locate **Users**.



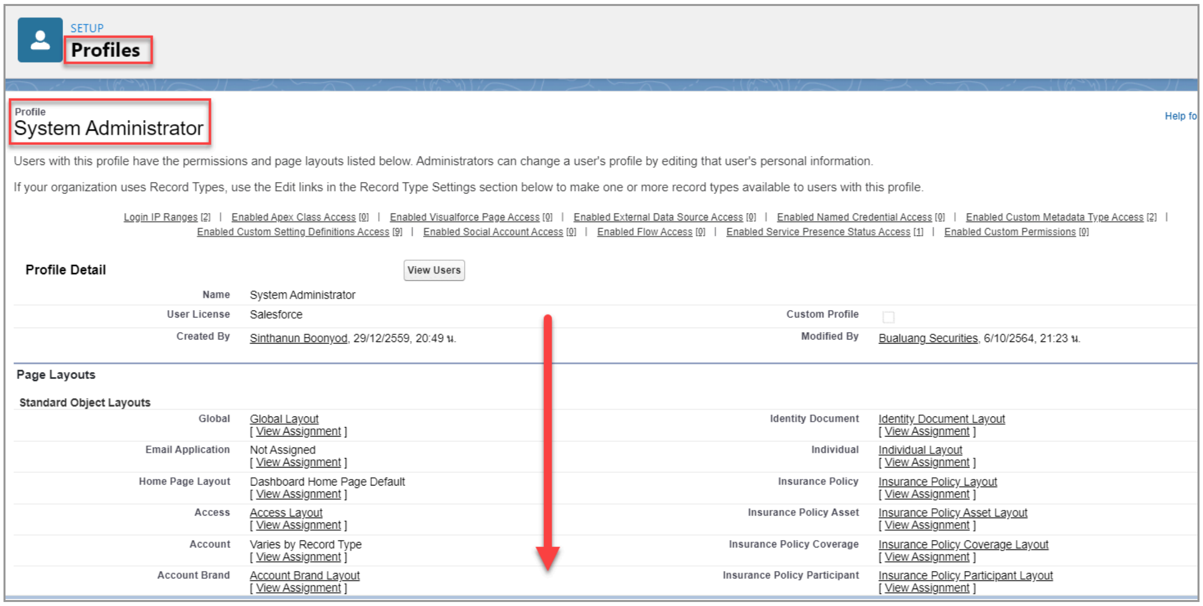
A list of users will open. Each user is assigned to a profile.

3. Identify the relevant user of the VRA.
4. Click on the user's profile.

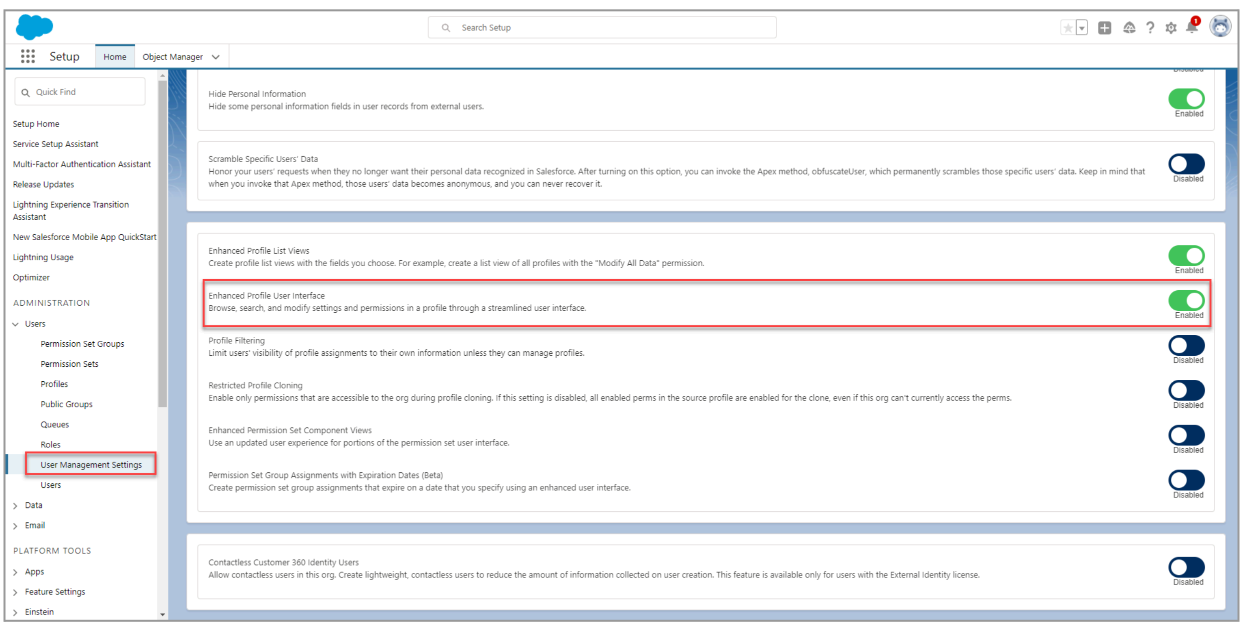
A page with all the user profile configurations will open. In this example, the **System Administrator** profile configuration page is displayed.



This page can display in a different format, depending on the organization's configuration.



5. Verify that the **Enhanced Profile User Interface** toggle under **User Management Settings** is turned ON.

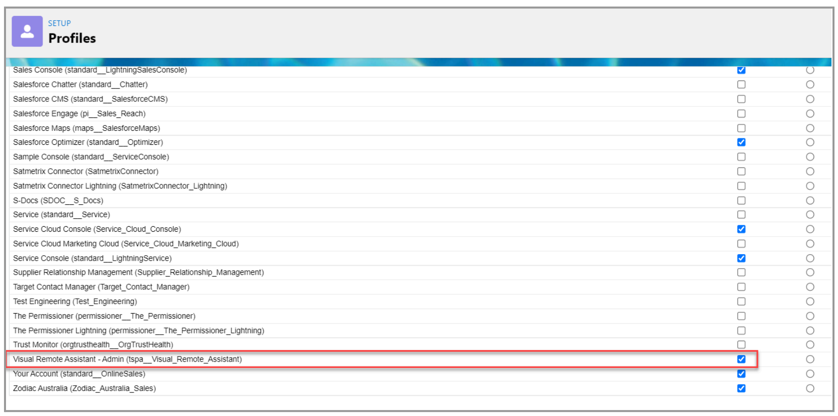


6. Refer to the explanation below to configure the profile, assuming the sub-sections **Apps** and **System** are visible on the page.

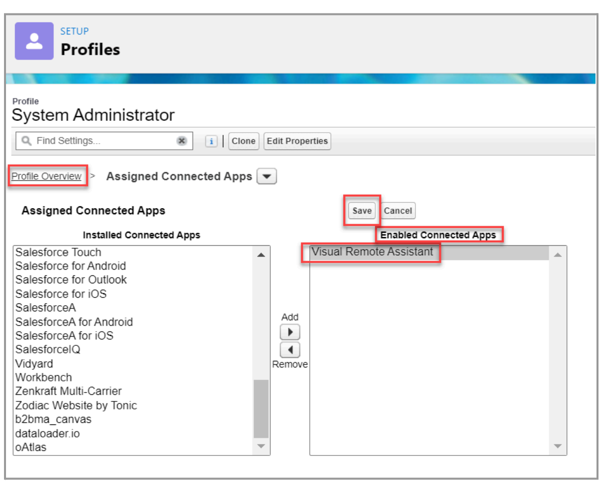
VRA Configuration for a User Profile

Go to the **Profile Overview** page and start configuring as follows:

1. Click on **Assigned Apps**.
    a. Click on the **Edit** button.
    b. Scroll down to the line **Visual Remote Assistant - Admin (tspa__Visual_Remote_Assistant)** and check the empty checkbox to the right of this option.
    c. Click on the **Save** button.
    d. Return to **Profile Overview**.



2. Click on **Assigned Connected Apps.**
    a. Click on the **Edit** button.
    b. Use the browser's search tool (Ctrl+F) to look for keywords and search for the word **Visual**. The option **Visual Remote Assistant** appears.
    c. Transfer this feature from the **Installed Connected Apps** panel to the **Enabled Connected Apps** panel on the right-hand side.
    d. Click on the **Save** button.
    e. Return to **Profile Overview**.



3. Click on **Object Settings.**
    a. Use the browser's search tool (Ctrl+F) to look for keywords and search for the word **Observer**. The option **Observer Details** appears.
    b. Click **Observer Details**.
    c. Click on the **Edit** button.
    d. From the **Tab Settings** drop-down menu select **Default On** .
    e. Check every single checkbox under every section on the page below.
    f. Click on the **Save** button.
    g. Return to **Profile Overview**.
    h. Use the browser's search tool (Ctrl+F) to look for keywords and search for the words **Visual** and **VRA**. A list of Visual Remote Assistant components appears.
    i. Every component that includes the words **Visual** and **VRA** should be configured one-by-one, by clicking on the component:
        - Click on the **Edit** button.
        - From the **Tab Settings** drop-down menu select **Default On**.
        - Click on the **Save** button.
        - Return to **Profile Overview** and repeat these steps for each component.
4. Click on **Apex Class Access**.
    a. Click on the **Edit** button.
    b. Use the browser's search tool (Ctrl+F) to look for keywords and search for the word **tspa**. A list of options starting with **tspa** appears**.**
    c. Transfer these features from the **Installed Apex Classes** panel to the **Enabled Apex Classes** panel on the right-hand side.
    d. Click on the **Save** button.
    e. Return to **Profile Overview**.
5. Click on **Visualforce Page Access**.
    a. Click on the **Edit** button.
    b. Use the browser's search tool (Ctrl+F) to look for keywords and search for the word **tspa**. A list of options starting with **tspa** appears**.**
    c. Transfer these features from the **Installed Visualforce Pages** panel to the **Enabled Visualforce Pages** panel on the right-hand side.
    d. Click on the **Save** button.
    e. Return to **Profile Overview**.

6. Click on **Custom Permissions.**
    a. Click on the **Edit** button.
    b. Use the browser's search tool (Ctrl+F) to look for keywords and search for the word **tspa**. The option **tspa.VisualSessionRecording** appears.
    c. Transfer this feature from the **Installed Custom Permissions** panel to the **Enabled Custom Permissions** panel on the right-hand side.
    d. Click on the **Save** button.
    e. Return to **Profile Overview**.

7. Click on **Custom Metadata Types**.
    a. Click on the **Edit** button.
    b. Use the browser's search tool (Ctrl+F) to look for keywords and search for the word **tspa**. A list of options starting with **tspa** appears**.**
    c. Transfer these features from the **Installed Custom Metadata Types** panel to the **Enabled Custom Metadata Types** panel on the right-hand side.
    d. Click on the **Save** button.
    e. Return to **Profile Overview**.
8. Click on **Custom Setting Definitions**.
    a. Click on the **Edit** button.
    b. Use the browser's search tool (Ctrl+F) to look for keywords and search for the word **tspa**. A list of options starting with **tspa** appears**.**
    c. Transfer these features from the **Installed Custom Setting Definitions** panel to the **Enabled Custom Setting Definitions** panel on the right-hand side.
    d. Click on the **Save** button.
    e. Return to **Profile Overview**.

    After completing the above steps, the VRA tool should be configured properly and enabled for the specific profile.
9. Create a Permission Set with the same configurations and assign the Permission Set to a specific user profile to be enabled for VRA.
10. Request the user of the profile configured to perform a direct login to Salesforce and check that the VRA works for this user.

Upgrade Visual Remote Assistant

ATTENTION: This is **mandatory** if you are upgrading an existing Visual Remote Assistant installation to the Spring '22 release version.

To upgrade:

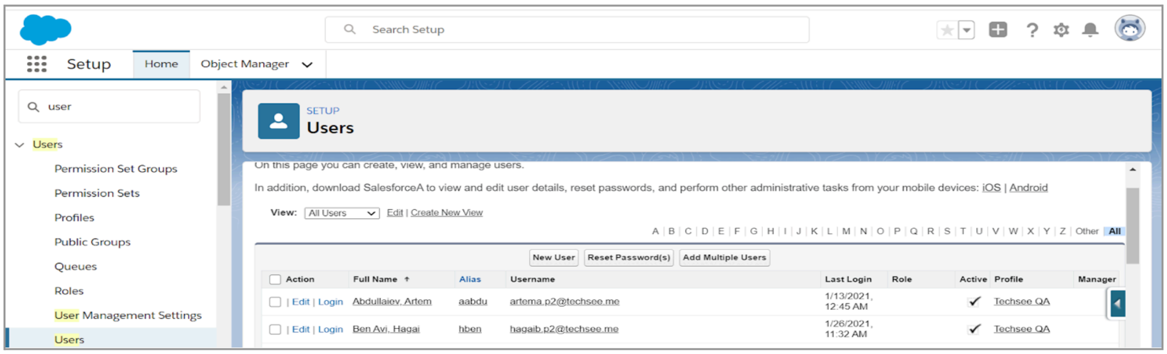
1. Open a browser and enter the installation URL: https://sfdc.co/visualremoteassistant-install
   The user is redirected to the Salesforce Login page.
2. Enter the user credentials and click **Login**.
3. Select **Admin/Users/Profiles** as required.
4. Click **Done**.
   The upgraded version of Visual Remote Assistant is displayed under **Setup** → **Installed Packages**

Note: The Visual Remote Assistant package will NOT be operational until the Account Configuration Update process is completed.

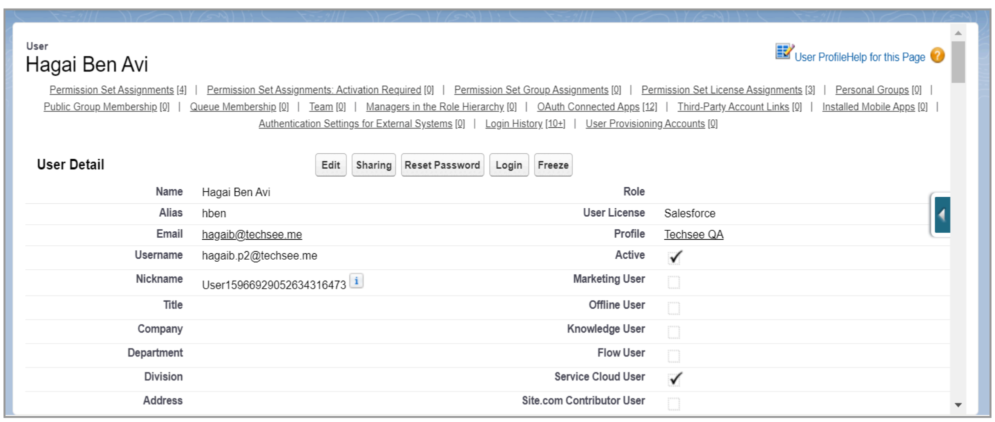
PERMISSION ASSIGNMENTS FOR VISUAL REMOTE ASSISTANT

Permission Set License Assignment

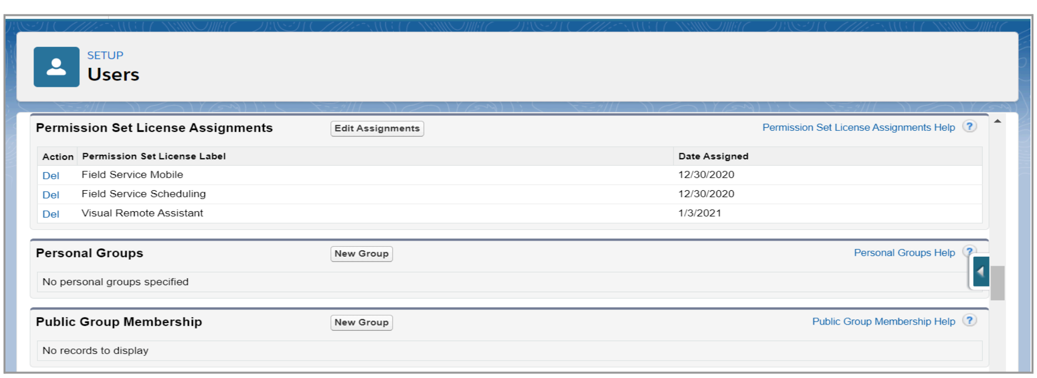
1. Click on the **Gear** icon in the top right corner and select **Setup**.
2. From **Quick Find**, search for **Users** and click on it.



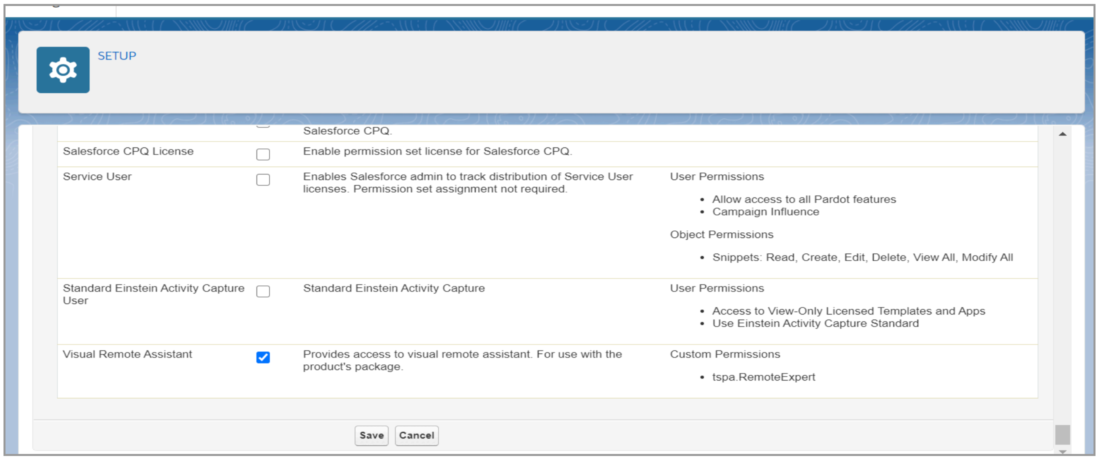
3. Click on the username to whom you want to permit Visual Remote Assistant.



4. From the options on top, click on Permission Set License Assignments.



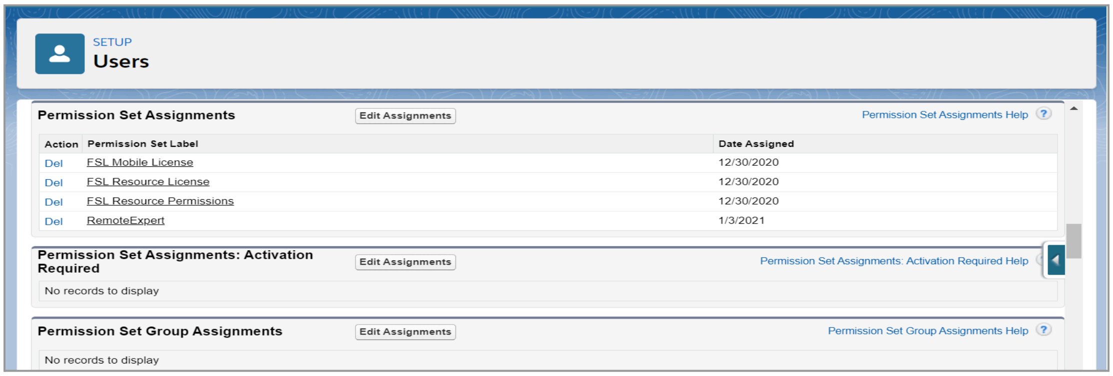
5. Click **Edit Assignment** and search for **Visual Remote Assistant**.



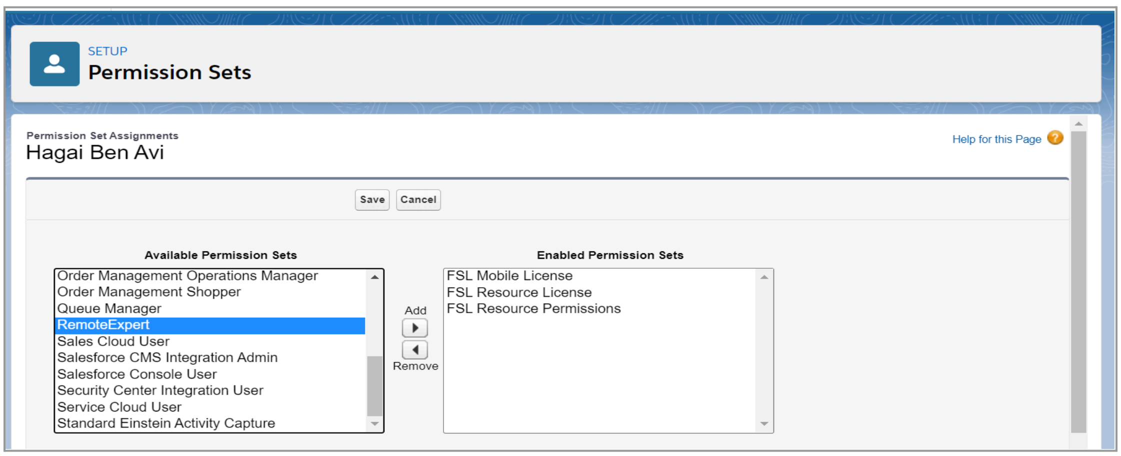
6. Check the checkbox and click on **Save**.

Permission Set Assignment

1. In the user detail page, from the **options** on top, click **Permission Set Assignments**.



2. Click **Edit Assignment** and search for **RemoteExpert** in available permission sets and click on **Add.**



3. Click on **Save**.

Once the SF admin completes the above two steps then the user will be permitted to use the Visual Remote Assistant package.

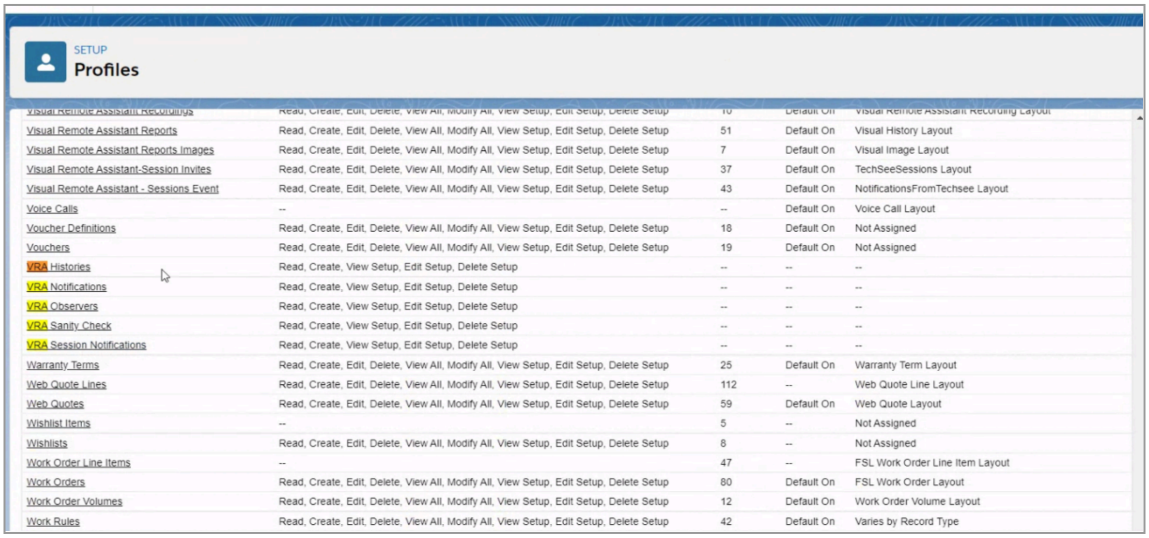
Note: Remote Expert Permission Set Assignments is only available after the Visual Remote Assistant package is installed (as remote expert permission set is created by the package installation)

Visual Remote Assistant Permission Sets Table

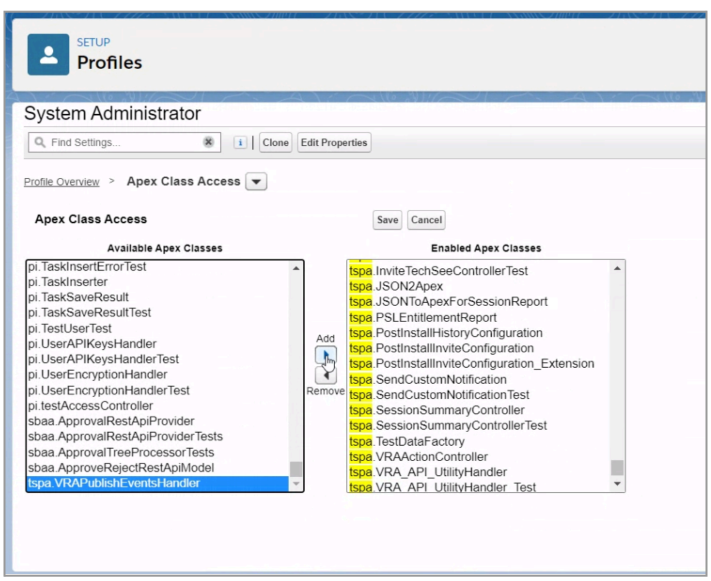
Permission Set	Package	User Type	Description
Remote Expert	Visual Remote Assistant	Admin & Agent	The user will be permitted to use the Visual Remote Assistant package.
VRA Community End User	Visual Remote Assistant	End User	The end user will be permitted to send a session request in the community site.
VRA Experiences Sites	VRA Scheduling	End User	The end user will be permitted to join the lobby page by a link that will be sent by email
VRA Scheduling	VRA Scheduling	Admin & Agent	The user will be permitted to use all functionality of VRA Scheduling.

PLATFORM EVENTS PREREQUISITES

1. Go to **Setup** → **Profiles**, select the relevant profile and click on **Object Settings.**
2. Search for **Visual Remote Assistant.**



3. Grant the following permissions:
   - Read
   - Create
   - View Setup
4. Go to **Setup** → **Profiles** → **Apex Classes**:
5. Search for **tspa**
6. Click on **Edit**



7. Select tspa.Visual Remote AssistantPublishEventsHandler.

Account Configuration Update

In order to use the upgraded Visual Remote Assistant after the managed package upgrade, an account configuration update is required.

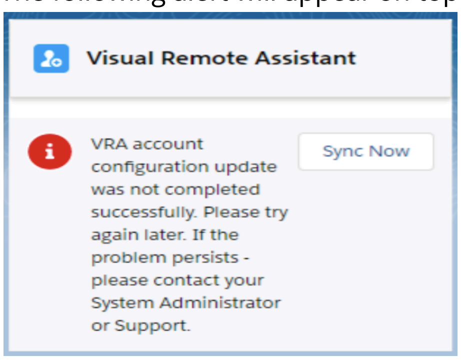
There are two options to update the configuration:

Visual Remote Assistant Configuration Tool

1. Once you finish upgrading the version of Visual Remote Assistant will be shown under **Setup → Installed Packages.**
2. Click on the **Configure** button, next to the package and go to the **Flow Testing** section in the left menu.
   Your Visual Remote account configuration will be updated automatically

Visual Remote Assistant Invite \ Visual History Component

1. Go to the object (e.g. Case \ Work Order \ etc.) on which the Visual Remote Assistant component is already configured.
2. The following alert will appear on top of the component:

3. Click **Retry'** - Your Visual Remote Assistant account settings are updated automatically.
   The Invite \ Visual History components are available again.

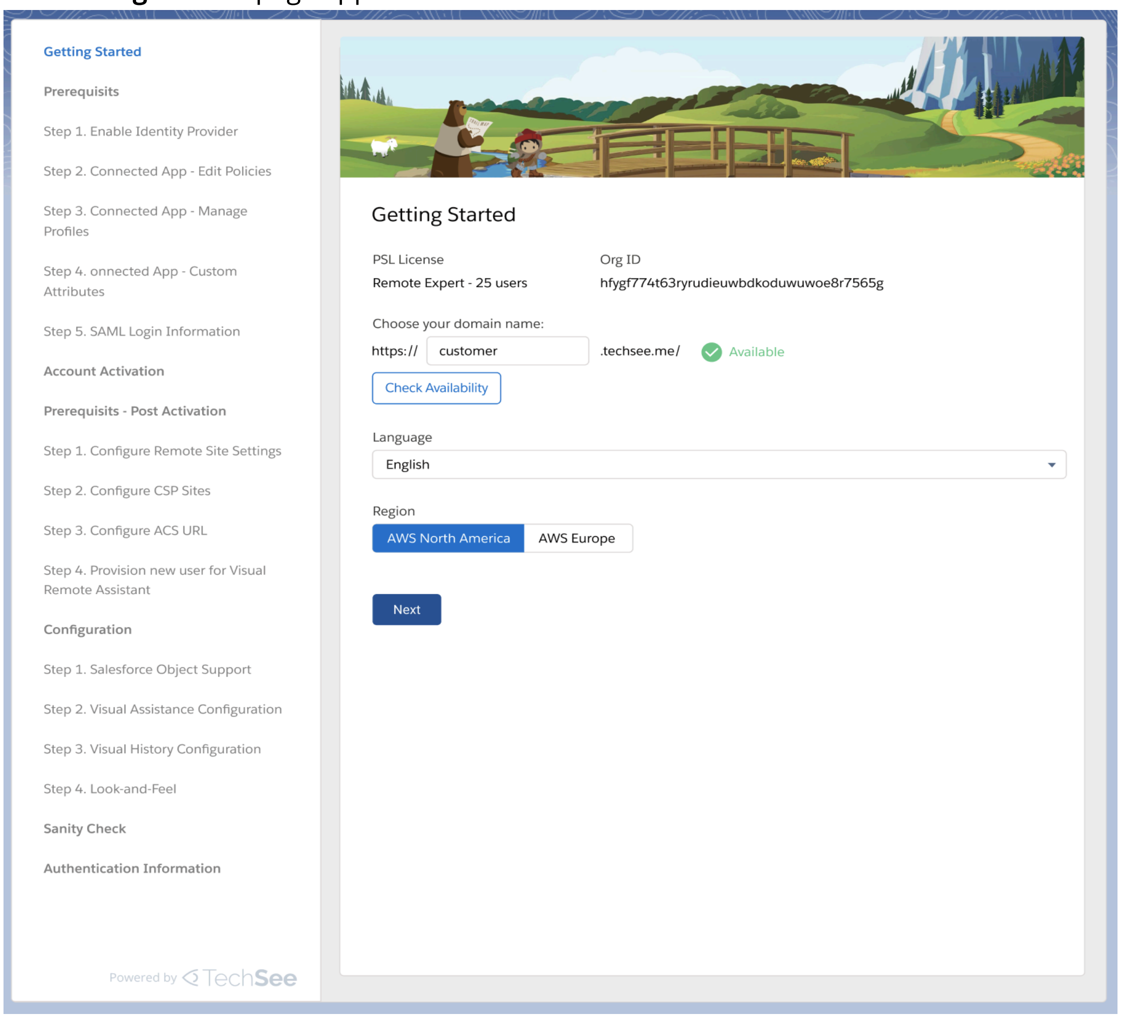
For upgrade process, upon successful completion of this process, please skip to *Digital Engagement for Visual Remote Assistant*.

VISUAL REMOTE ASSISTANT - GETTING STARTED

Visual Remote Assistant contains an Admin configuration panel, which guides the Salesforce Admin step-by-step, from initial configuration to flow testing.

Each screen contains detailed instructions and screenshots in order to simplify the configuration process.

1. Go to **App Launcher** and search for **Visual Remote Assistant – Admin**.
   The **Getting Started** page appears.



The following information is retrieved:

- The Permission Set Licenses quota for **Remote Expert**
- Salesforce Organization ID
- Salesforce Organization Type
- Salesforce Organization Name

Selecting Domain Name

1. A domain name should be registered under the **techsee.me** primary domain name.
2. Enter the desired domain name and click **Check Availability**.
   An indication appears on the screen whether the requested domain name is available or not.
3. Domain name validation:

   - Maximum of 10 characters in Production org.
   - Maximum of 8 characters in Sandbox org.
   - Uppercase letters will be automatically converted to lowercase letters.

Selecting Language

1. Choose the End User UI language, from the dropdown menu. English is the default language.
   For Salesforce UI language customization, please refer to the **Configuration** section.

Selecting Region

1. Choose the region in which the account and the video site will be created, there are two options:
   - AWS North America (default)
   - AWS Europe
2. In the case of APAC region, please contact Salesforce Support in order to configure the account to use AWS Sydney video site.
3. Click **Next** to move to the part that handles **Prerequisites**.

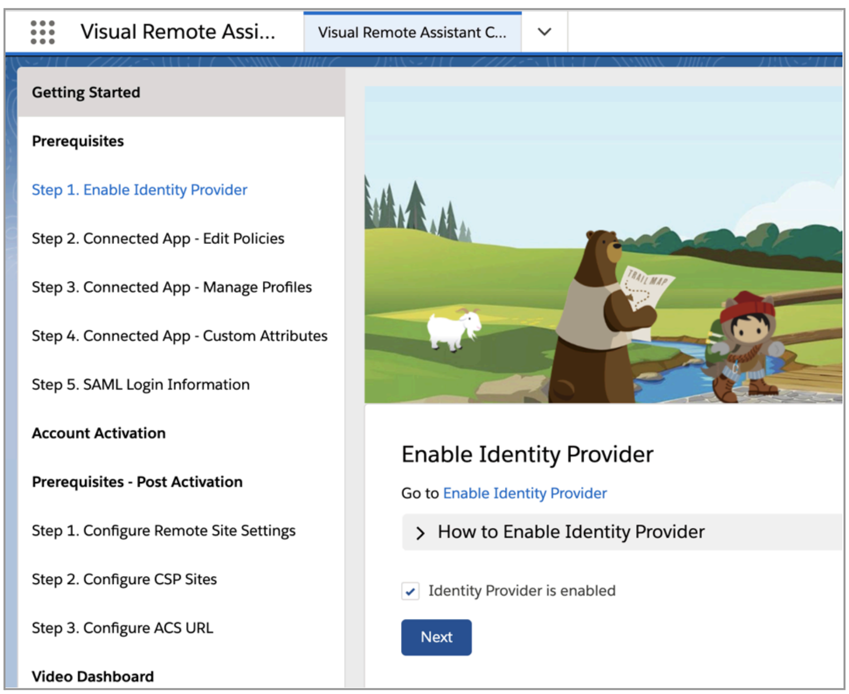
PREREQUISITES HANDLING

In order to create an account on the Salesforce platform, there are several prerequisite requirements to be handled.

Please review each prerequisite carefully, as each one of them is mandatory in order to set up your Visual Remote Assistant account.

Enable Identity Provider

1. In order to use Visual Remote Assistant, **Identity Provider** has to be enabled in your Salesforce organization, since the package relies on SSO authentication.
2. Click **Enable Identity Provider** link shown at the top of the screen.
   You are redirected to **Setup** → **Identity Provider** page.
3. If **Identity Provider** is not enabled, then click **Enable Identity Provider**.
   - A certificate is shown in the dropdown list in the screen.
   - Click **Save**.
4. Go back to the **Visual Remote Assistant - Configuration** tab and check the **Identity Provider is enabled** checkbox.
5. Click **Next**.



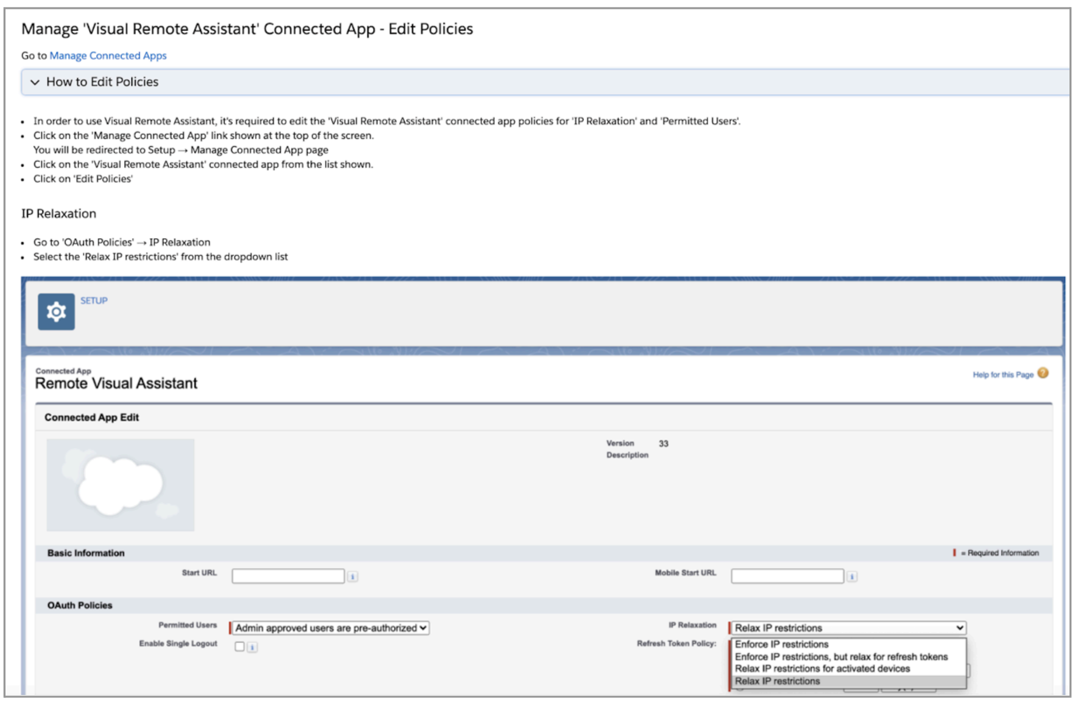
Connected App - Edit Policies - IP Relaxation & Permitted Users Configuration

To use Visual Remote Assistant, edit the **Visual Remote Assistant** connected app policies for **IP Relaxation** and **Permitted Users**.

1. Click the **Manage Connected App** link shown at the top of the screen.
   You are redirected to **Setup** → **Manage Connected App** page.
2. Click the **Visual Remote Assistant** connected app from the list shown.
3. Click on **Edit Policies**.

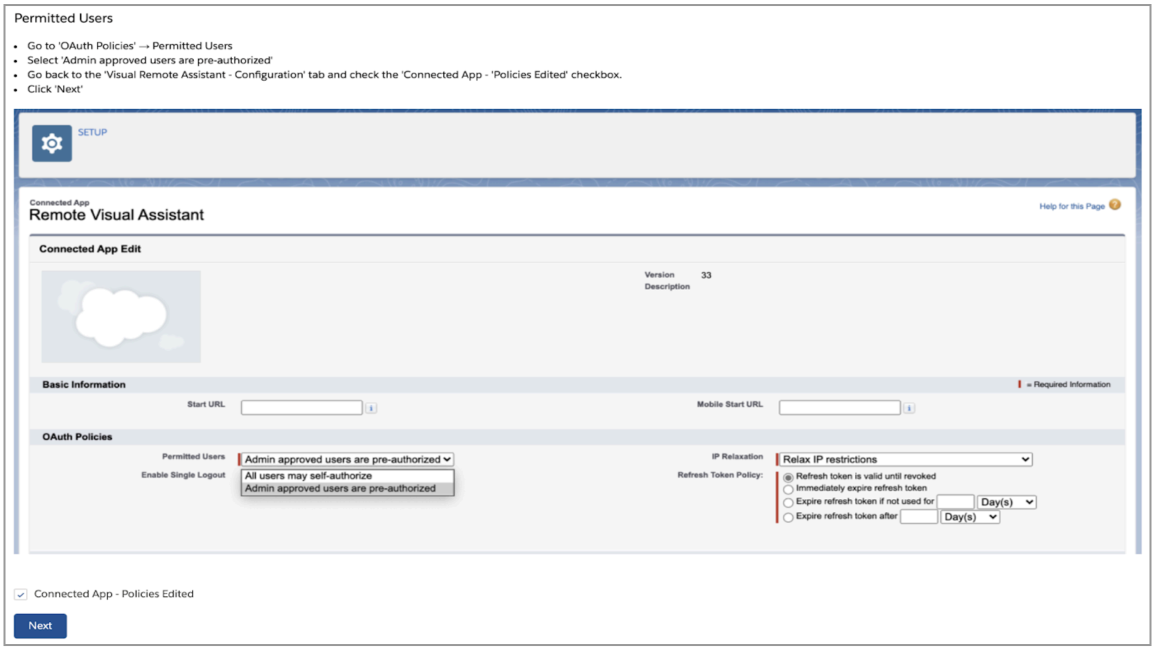
IP Relaxation

1. Go to **OAuth Policies** → **IP Relaxation**.
2. Select **Relax IP Restrictions** from the dropdown list.



Permitted Users

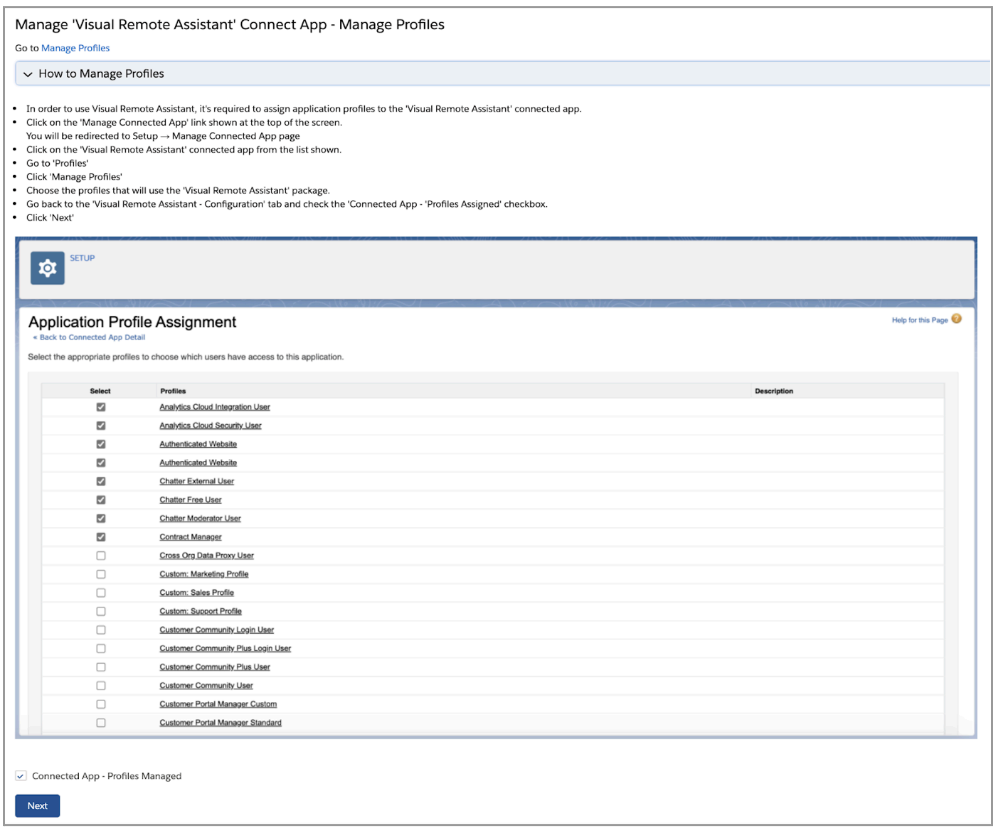
1. Go to **OAuth Policies** → **Permitted Users**.
2. Select **Admin approved users are pre-authorized**.
3. Go back to the **Visual Remote Assistant - Configuration** tab and check the **Connected App - Policies Edited**' checkbox.
4. Click **Next.**



Connected App - Manage Profiles

To use Visual Remote Assistant, assign application profiles to the **Visual Remote Assistant** connected app.

1. Click on the **Manage Connected App** link shown at the top of the screen.
   You are redirected to **Setup** → **Manage Connected App** page.
2. Click on the **Visual Remote Assistant** connected app from the list shown.
3. Go to **Profiles**.
4. Click **Manage Profiles**.
5. Select the profiles that will use the Visual Remote Assistant package.
6. Go back to the **Visual Remote Assistant - Configuration** tab and check the **Connected App - Profiles Assigned** checkbox.
7. Click **Next**.



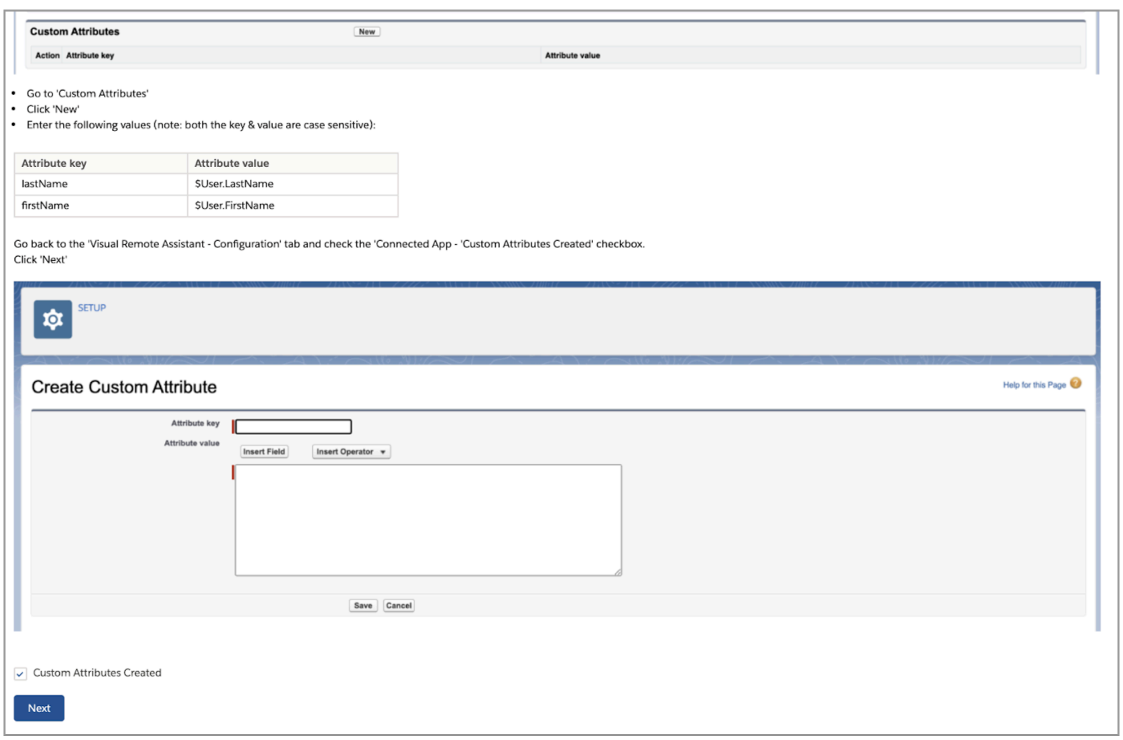
Connected App - Custom Attributes

To use Visual Remote Assistant, configure the custom attributes that will be used to identify the Salesforce user in TechSee.

1. Click on the **Manage Connected App** link shown at the top of the screen.
   You will be redirected to the **Setup** → **Manage Connected App** page.
2. Click on the **Visual Remote Assistant** connected app from the list shown.
3. Go to **Custom Attributes**
4. Click **New**.
5. Enter the following values (both the key & value are case sensitive):

Attribute key	Attribute value
lastName	$User.LastName
firstName	$User.FirstName

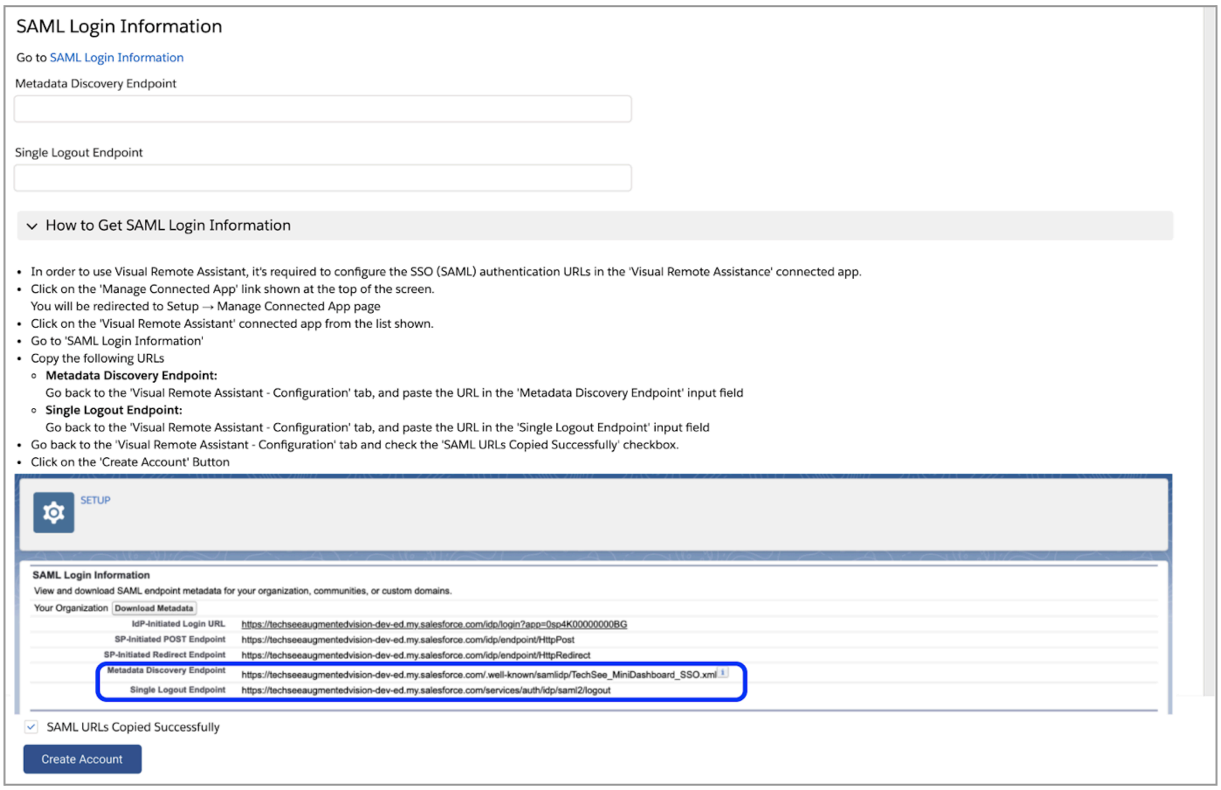
6. Go back to the **Visual Remote Assistant - Configuration** tab and check the **Connected App - Custom Attributes Created** checkbox.
7. Click **Next**.



SAML Login Information

To use Visual Remote Assistant, it’s required to configure the SSO (SAML) authentication URLs in the **Visual Remote Assistant** connected app.

1. Click on the **Manage Connected App** link shown at the top of the screen.
   You will be redirected to **Setup** → **Manage Connected App** page.
2. Click on the **Visual Remote Assistant** connected app from the list shown.
3. Go to SAML Login Information.
4. Copy the following URLs:
   - Metadata Discovery Endpoint:
     Go back to the **Visual Remote Assistant - Configuration** tab, and paste the URL in the **Metadata Discovery Endpoint** input field.
   - Single Logout Endpoint:
     Go back to the **Visual Remote Assistant - Configuration** tab, and paste the URL in the **Single Logout Endpoint** input field.
5. Go back to the Visual Remote Assistant - Configuration tab and check the SAML URLs Copied Successfully checkbox.
6. Click on Create Account.

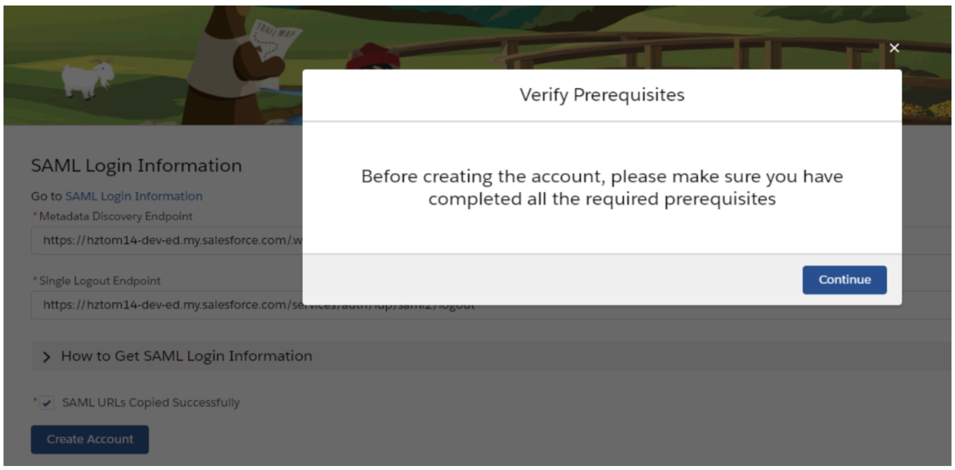


CREATE & ACTIVATE ACCOUNT FLOW

Account Creation

Account Creation flow provisions a new Visual Remote Assistant account on the Salesforce platform. The account is created in **Pending** state until it is activated by the Salesforce Admin user.

1. The Salesforce Admin clicks **Create Account**.
   The **Verify Prerequisites** popup appears:

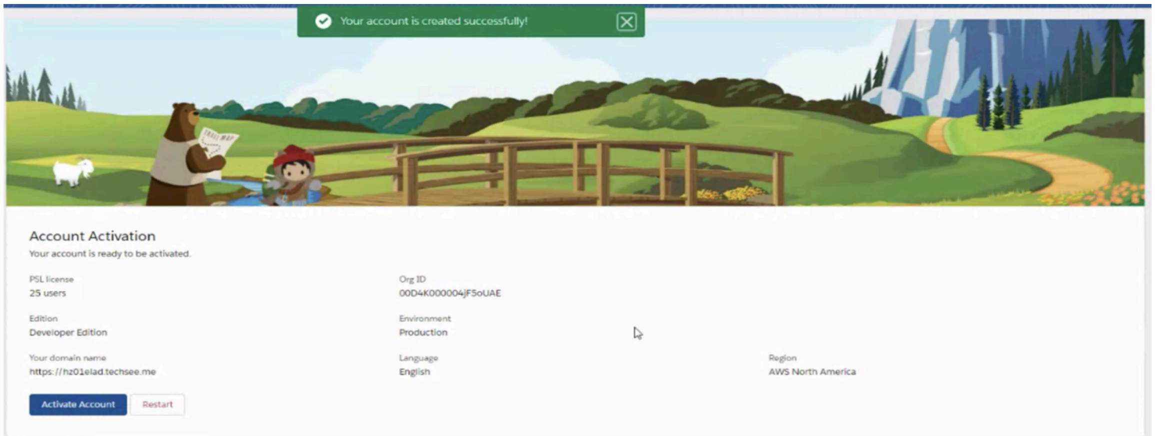


In this popup, the Salesforce Admin is prompted to verify that all prerequisites have been completed successfully, as instructed in the previous steps.

- Clicking **Cancel** allows the Salesforce Admin to go back and review the prerequisites steps.
- Clicking **Continue** creates an account on the Salesforce platform.

Account Activation

When the Salesforce Admin clicks **Continue**, the account creation operation is performed.
The following screen appears:



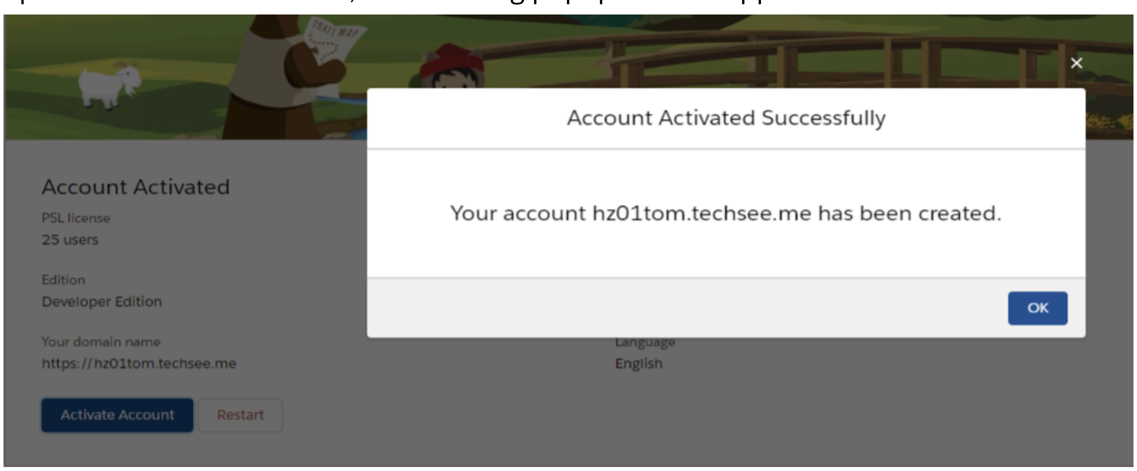
The Salesforce Admin can activate the account within 48 hours from the time the account had been created.

Activation Expiration

Account Activation-expires after 48 hours.
Once the Salesforce Admin clicks on **Activate Account** and the expiration due date has passed, a message appears on the screen, asking the Salesforce Admin to start the process again.

Successful Activation

Upon a successful activation, the following popup window appears:



When the user clicks **Ok**, the Salesforce Admin is redirected to the **Post Activation - Configuration** steps.

POST ACCOUNT ACTIVATION - CONFIGURATION

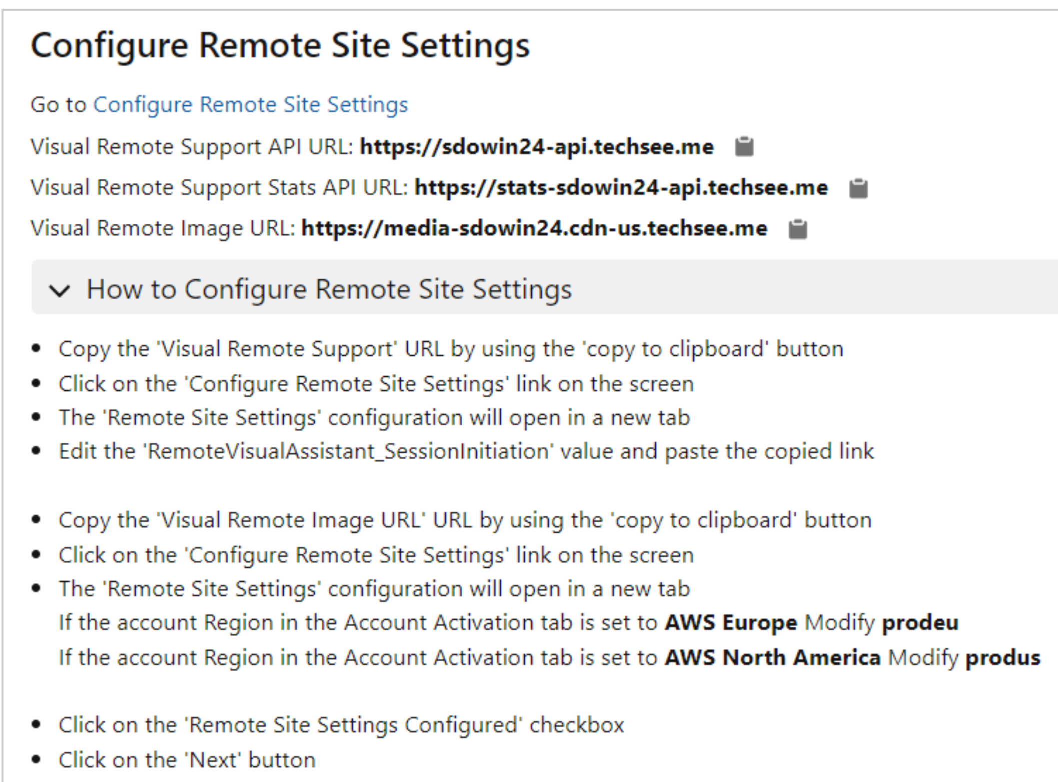
After successful activation of the Visual Remote Assistant account, a few steps should be taken to complete the configuration: CSP Trusted Sites, Remote Site Settings, and ACS URL configuration.

Remote Site Settings

- Copy the '**Visual Remote Support API**' URL by using the 'copy to clipboard' button.
- Click on the '**Configure Remote Site Settings**' link on the screen.
- The '**Remote Site Settings**' configuration will open in a new tab.
- Edit the '**RemoteVisualAssistant_SessionInitiation**' value and paste the copied link.

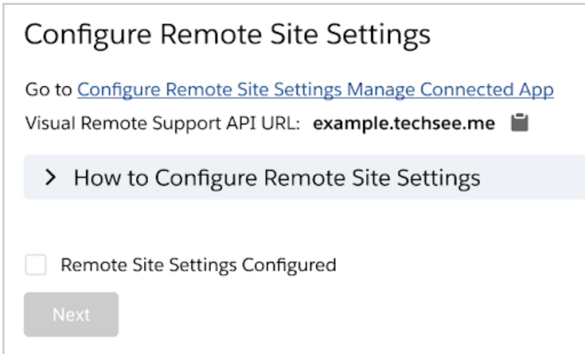
- Copy the '**Visual Remote Image**' URL by using the '**copy to clipboard**' button.
- Click on the '**Configure Remote Site Settings**' link on the screen.
- The '**Remote Site Settings**' configuration will open in a new tab.
- If the account Region in the Account Activation tab is set to **AWS Europe** Modify **prodeu**.
- If the account Region in the Account Activation tab is set to **AWS North America** Modify **produs.**

- Copy the '**Visual Remote Support Stats API**' URL by using the '**copy to clipboard**' button.
- Click on the '**Configure Remote Site Settings**' link on the screen.
- The '**Remote Site Settings**' configuration will open in a new tab.
- Create a new remote site for '**Visual Remote Support Stats API**' and paste the copied link.

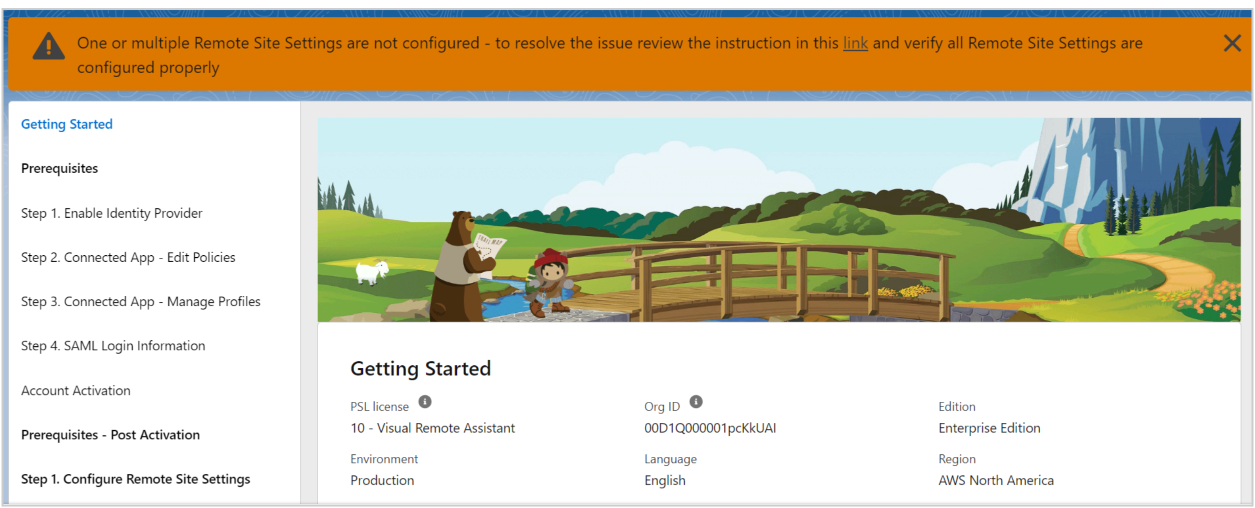


- Click on the '**Remote Site Settings Configured**' checkbox

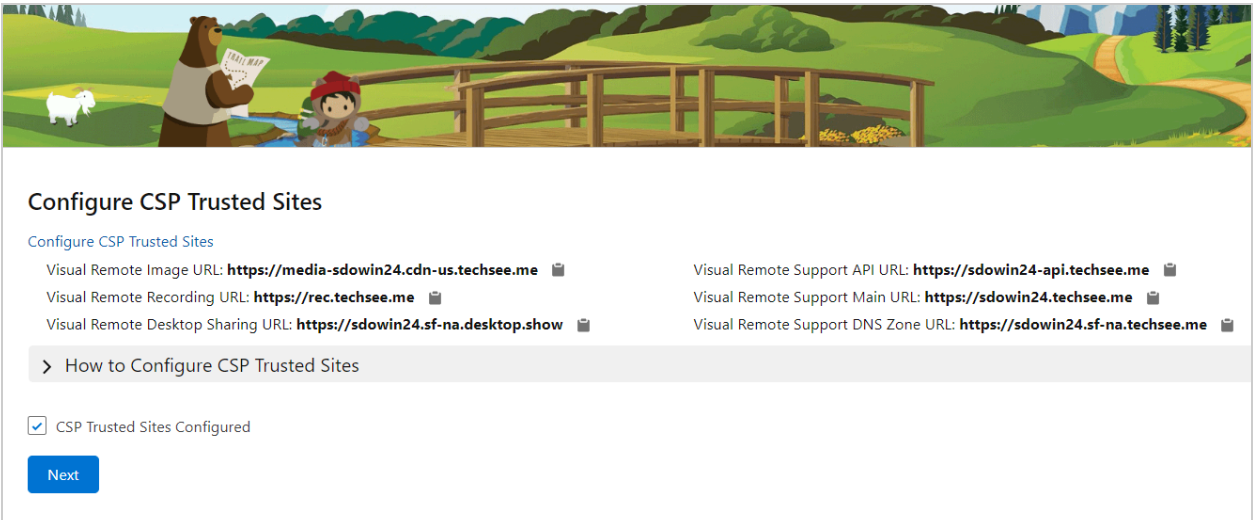
- Click on the '**Next**' button



Important Note: If one or multiple Remote Site Settings URLs are not configured, a notification will appear in the Visual Configuration Panel that indicates this issue. The notification includes a link that directs to the Remote Site Settings configuration page instructions. After completing to configure all the Remote Site Settings URLs, this notification will disappear.



CSP Trusted Sites

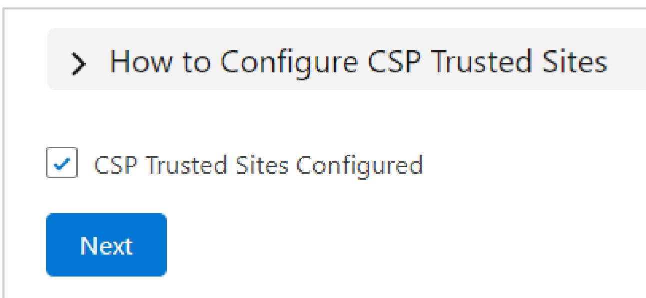


1. Click on the clipboard icon next to the '**Visual Remote Support API URL**' in order to copy the related URL.
2. Click on the '**Configure CSP Trusted Sites**' link on the top of the screen.
3. The **CSP Trusted Sites configuration** will open in a new tab.
4. Click on the Edit button next to '**VisualRemoteAssistant_APIURL**' and paste the copied link in the Trusted Site URL section (replace the existing link with the copied link).
5. Click on the '**Save**' button.
6. **Repeat steps 1, 4 and 5 for every URL that is presented in the configuration panel**. Update the required CSP Trusted Sites with the matching URL presented in the configuration panel, as displayed in the following table:

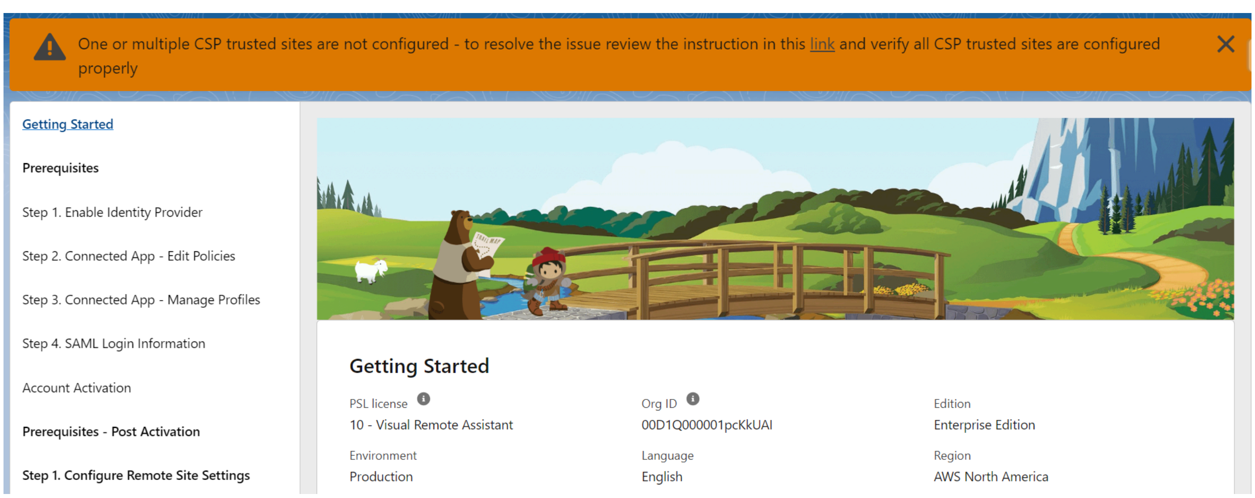
URL From The Configuration Panel	**CSP Trusted Site**	
Visual Remote Support Image URL	If the account region in the Account Activation tab is set to **AWS Europe** Modify: VisualRemoteAssistant_ImageURL_EU	If the account region in the Account Activation tab is set to **AWS North America** Modify: VisualRemoteAssistant_ImageURL_US
Visual Remote Support Recording URL	If the account region in the Account Activation tab is set to **AWS Europe** Modify: VisualRemoteAssistant_RecordingURL_EU	If the account region in the Account Activation tab is set to **AWS North America** Modify: VisualRemoteAssistant_RecordingURL_US

Visual Remote Support Desktop Shearing URL	VisualRemoteAssistant_DesktopSharingURL	
Visual Remote Support Main URL	RemoteVisualAssistant_SSOAuthenticationURL	
Visual Remote Support DNS Zone URL	VisualRemoteAssistant_DNSZoneURL	

7. Click on the '**CSP Trusted Sites Configured**' checkbox.
8. Click on the '**Next**' button.

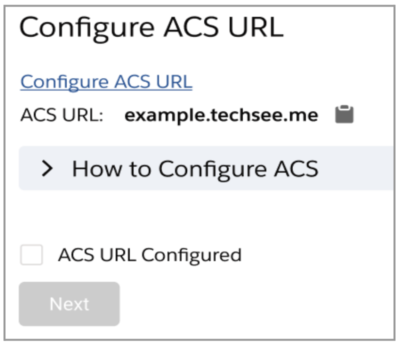


Important Note: If one or multiple CSP trusted sites are not configured, a notification will appear in the Visual Configuration Panel that indicates this issue. The notification includes a link that directs to the CSP trusted sites configuration page instructions. After completing to configure all the CSP trusted sites, this notification will disappear.



ACS URL Configuration

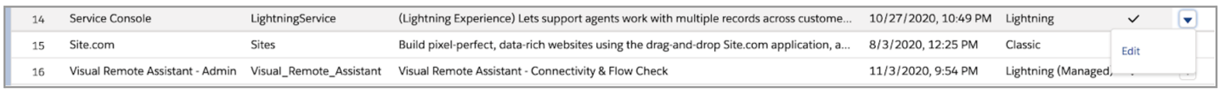
1. Copy the ACS URL using the **copy to clipboard** button
2. Click on the **Manage Connected App** link shown at the top of the screen.
   You are redirected to **Setup** → **Manage Connected App** page.
3. Click on the **Visual Remote Assistant** connected app from the list shown.
4. Click **Edit Policies**.
5. Go to **SAML Service Provider Settings** → **ACS URL** and paste the copied URL.



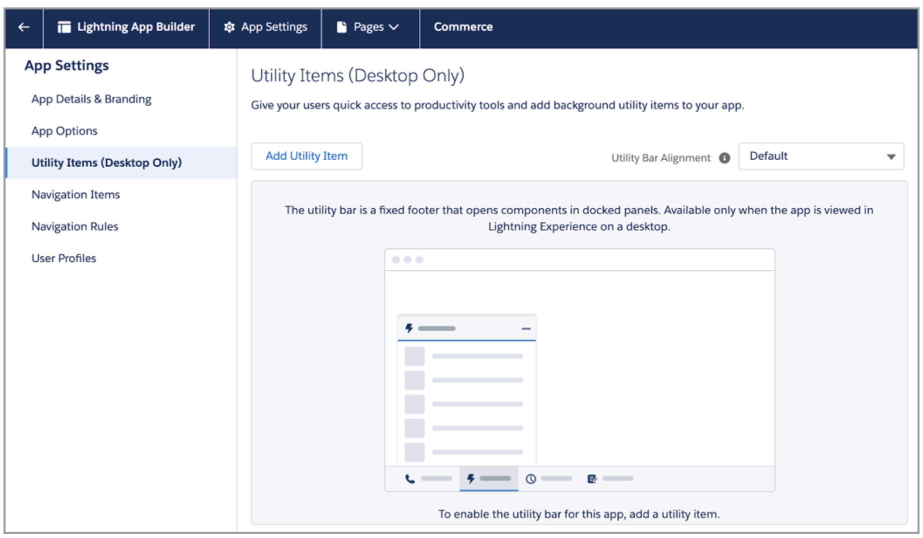
ADDING VIDEO DASHBOARD TO APP MANAGER

After the account activation is completed successfully, add the docked lightning utility bar object **Video Dashboard** to the Salesforce objects for which you would like to have Visual Remote Assistant configured to.

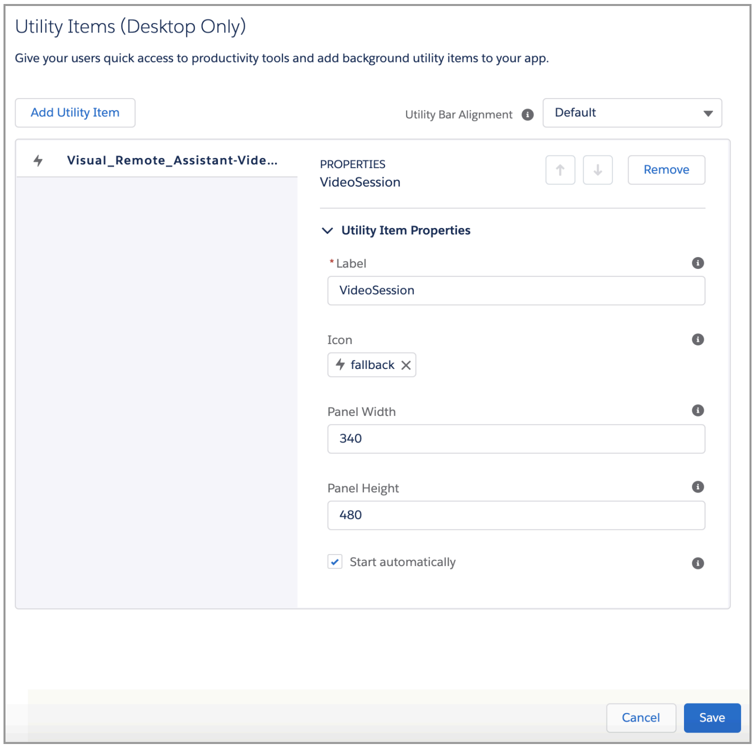
1. Go to **Setup**.
2. In **Quick Find**, search for **App Manager**.
3. Choose the Lightning object for each item you added Visual Remote Assistant support to. Verify it is **Lightning** and not **Classic** object.
4. Click **Edit**.



5. Go to **Utility Items (Desktop only)**



6. Click on **Add Utility** Item.
7. Go to **Custom Managed** at the bottom of the menu.
8. Click on the **Visual_Remote_Assistant-Video_Dashboard**.
9. Check the **Start Automatically** checkbox at the bottom of the screen.



10. Click **Save**.

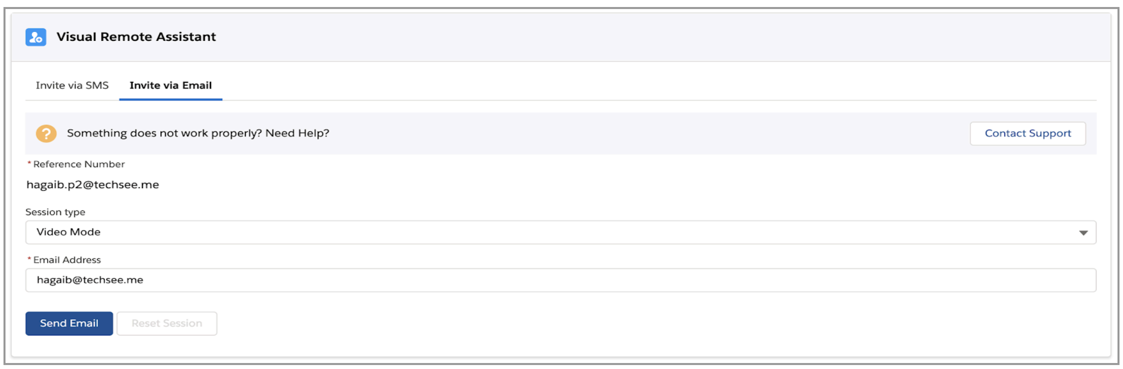
FLOW TESTING

Upon successful completion of the account creation & activation process, prerequisites handling and post activation configuration - now you are ready to test the Visual Remote Assistant Flow.

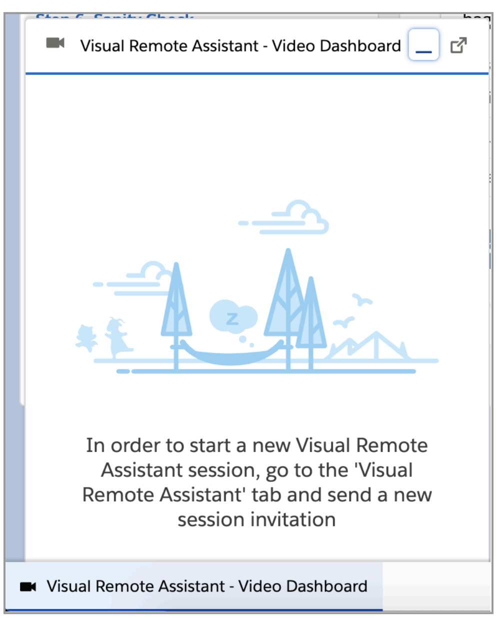
Inside the Visual Remote Assistant Configuration tool, you will find a **Flow Testing** section. This section will allow you to easily test the entire product flow, end-to-end, from sending the invitation, through a live video session and viewing session summary with visual history records.

Invite Flow Testing

1. Choose **Invite via SMS** or **Invite via Email** tab.
   The **Customer Reference Number** is set with the username of the Salesforce Admin who is running the flow testing.
2. Enter a phone number or email address and click **Send.**

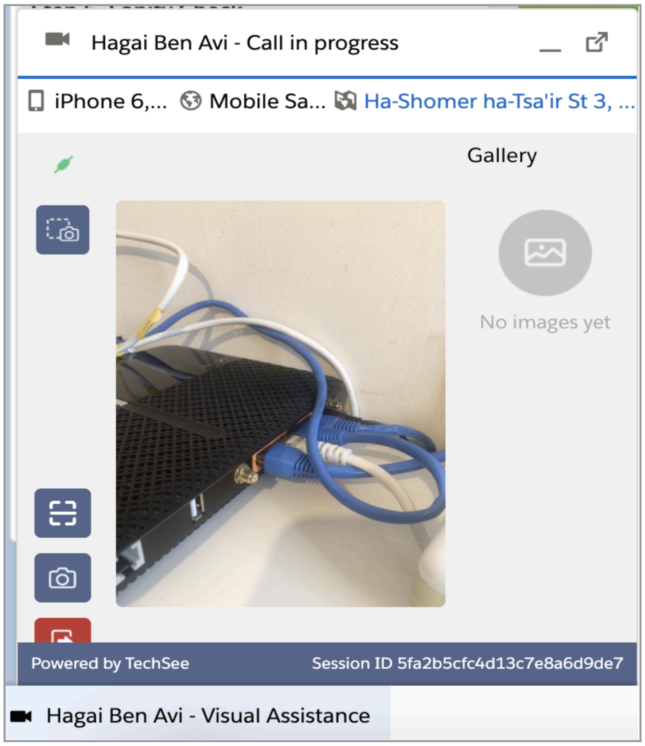


3. The invitation is sent using the method requested.
4. Once you receive the test flow invitations, click on the invitation URL inside the message.
   Video Dashboard Testing
   At the bottom left corner of the screen, you will see a docked lightning utility bar object, named **Visual Remote Assistant - Video Dashboard**.



The Video Dashboard is automatically triggered as the invitation is delivered to the end user. The end user connects to the session by clicking on the invite link. The end user accepts the Terms of Service and grants camera permissions.

5. The video dashboard will show the live video stream.

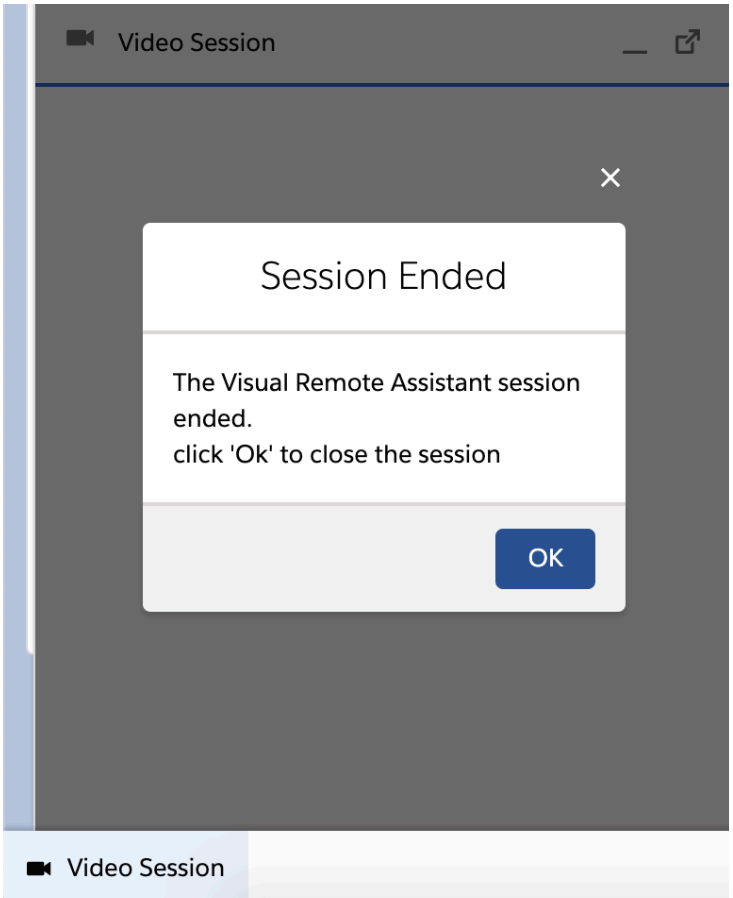


Once the video dashboard - the system is configured properly for Visual Remote Assistant.

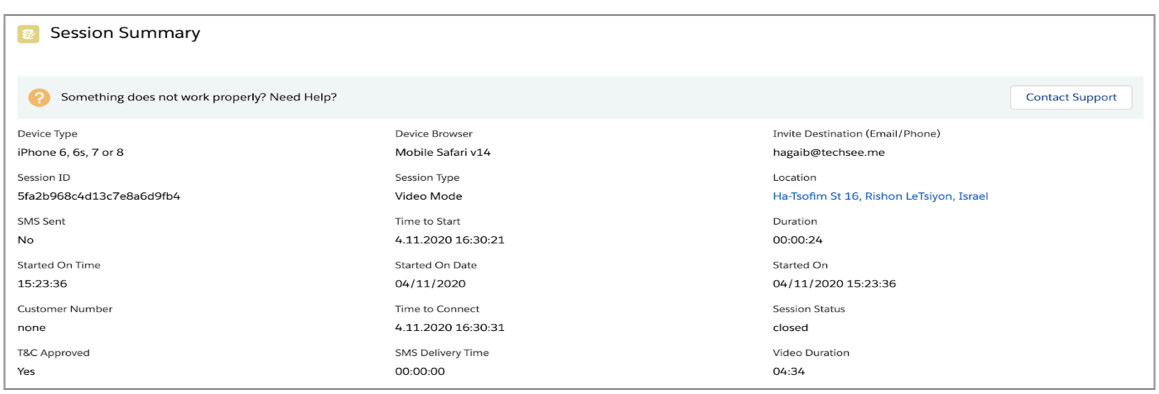
Note: If the "Send Invite" button is grayed out, refresh the page and try again.

Session Summary & Visual History

1. Click the End **Session** red button at the bottom left corner of the video dashboard. The following message appears on the screen:



2. Click **OK**.
3. A toast notification will appear on the screen - *New Visual Remote Assistant history record created*
4. The Session Summary screen appears:



Comments

Write a comment...

Add Comment

Images

Description Tags

Write a comment...

Add Comment

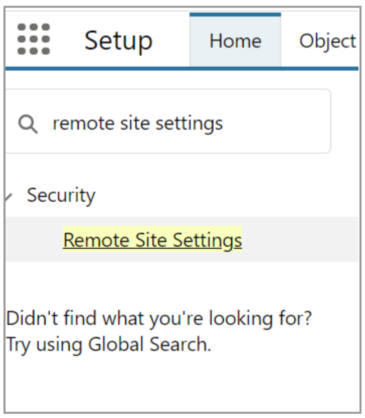
Finish

Visual Remote Assistant - Convert Image Links to Files Automated Process Prerequisite

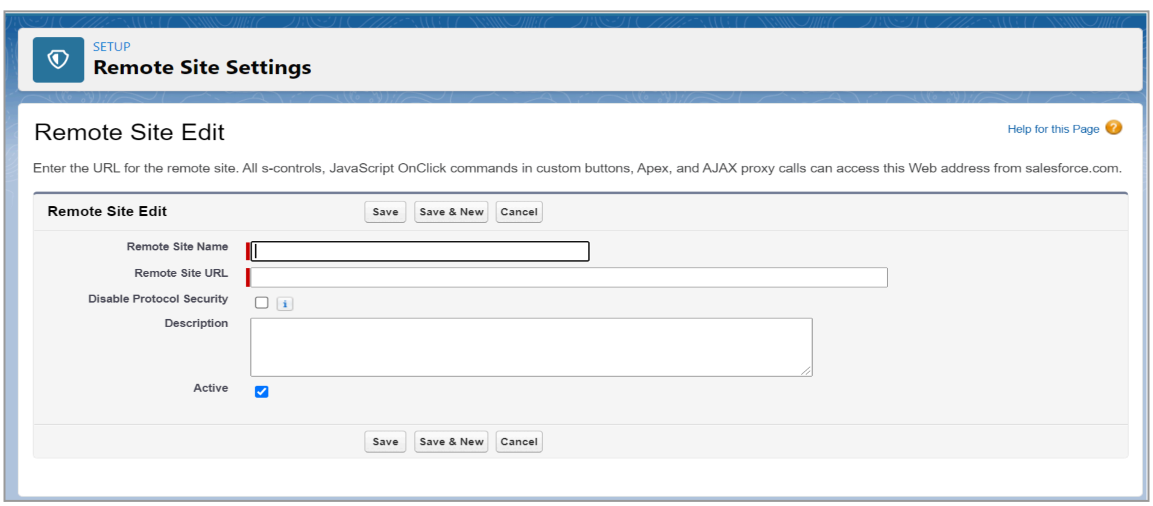
This Visual Remote Assistant action sample allows Visual Remote Assistant session history images to be linked as files inside the record from where the session was initiated. To use this feature, the following prerequisites are required.

Remote Site Settings

1. From the session summary of flow testing click on the download button of image thumbnail.
2. When the image opens in the new browser tab copy the base URL
   for example,
   Image link -
   https://preprod-eu.techsee.me/test-eu-central-1.xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx-Amz-SignedHeaders=host
   base URL - https://preprod-eu.techsee.me
3. Click on the **Gear** icon from top right corner and select **Setup**.



4. From the **Quick Find**, search for **Remote Site Settings** and click on it.
5. Click **New Remote Site.**



6. Provide the unique name in **remote site name**
   for example, *Visual Remote Assistant_Image_Automation*
7. Paste the **Root Url** in *remote site url.*

8. Click **Save**.

CONFIGURATION

Your Visual Remote Assistant account is now ready to be configured and customized in your Salesforce organization.

The configuration steps include the following:

1. **Salesforce object support:**
   Pay extra attention to this step, as this will be the basis for sending session invitations.
   In this step you need to determine which object in Salesforce will be configured to work with Visual Remote Assistant.
   For example - Lead, Work Order, Case, Service Appointment, etc.

   For each object you selected, you will need to choose the **Reference Number** field which will be the unique identifier.

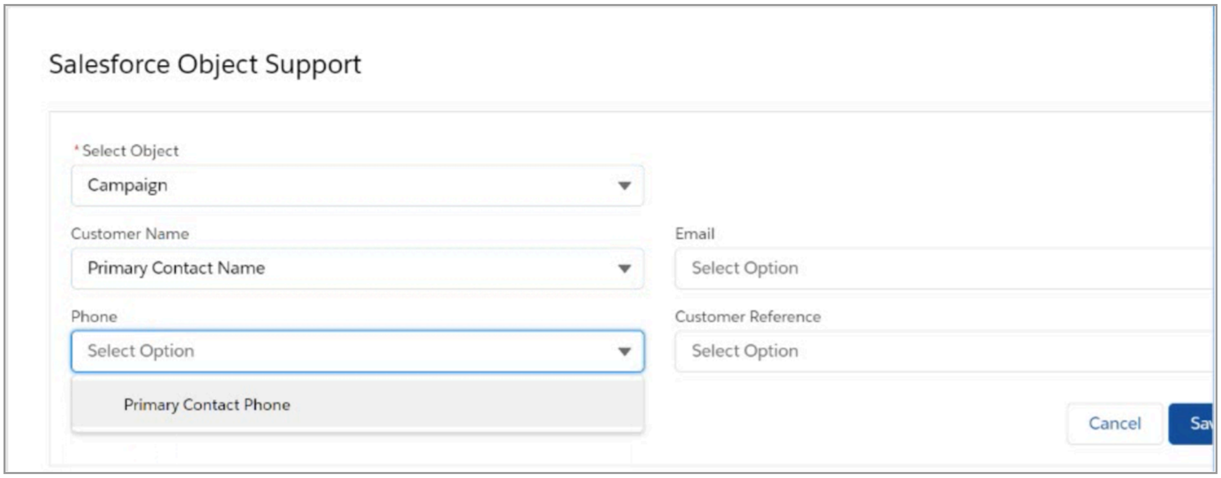
   You can also determine which fields will be used to retrieve automatically the Email Address and Mobile Phone number to which the invitation will be sent.
2. **Visual Assistant Configuration:**
   Customizing the invite flow - which country codes will be used \ delivery method (SMS \ Email) and UI customization options

3. **Visual History Configuration:**
   Customizing the way visual records are created and collected per each Visual Remote Assistant session.

Adding Visual Remote Assistant to Salesforce object:
Detailed guidance on how to customize the page layout in order to add **Invite Form** and **Visual History** lightning components - in order to make them available for your users.

Add Visual Remote Assistant to your Cloud Objects

1. In the App Launcher, go to **Visual Remote Assistant – Admin**.
2. Go to **Configuration**.
3. Go **to Salesforce Object Support**.
4. Click on **Add new object**.
5. The following screen appears:



6. In the **Select Object** field, select the desired Salesforce object, to which the **Visual Remote Assistant** application will be correlated.
   If the **Select Object** dropdown field doesn't open, refer to the manual procedure to complete this step (see below).
   Note: You can correlate Visual Remote Assistant with multiple objects.
7. Configure the following session invite fields:

Field	Type	Description
Customer Name	Optional	Select which field in the selected Salesforce object will be used to show the customer name information
Email	Optional	Select which field in the selected Salesforce object will be used to send Email invitations
Phone	Optional	Select which field in the selected Salesforce object will be used as the mobile phone number to which SMS invitations will be sent
Customer Reference	Mandatory	Select which field will be used as the unique identifier, to which the Visual History records will be correlated

Field	Type	Input Source
Object Name	Mandatory	Go to Object Manager Object Manager → API Name field The Salesforce object to which the Visual Remote Assistant will be configured
Customer Reference	Mandatory	Go to Object Manager Object Manager → Label → Fields & Relationships → Field Name <u>Choose a field which a Unique Identifier, e.g. **ID** field</u>
Customer Name	Optional	Go to Object Manager Object Manager → Label → Fields & Relationships → Field Name Choose a field which represents the customer name
Email	Optional	Go to Object Manager Object Manager → Label → Fields & Relationships → Field Name Choose a field which is the Email address to which the invitation will be sent
Mobile Phone	Optional	Go to Object Manager Object Manager → Label → Fields & Relationships → Field ame Choose a field which is the Mobile Phone to which the SMS invitation will be sent

8. Click on **Save**
   The outcome looks as follows:

Object Name	Customer Name	Email	Phone	Reference Field	Action
Lead	Name	Email	Phone	LastName	Edit Delete
Case	Contact_Name__c	ContactEmail	ContactPhone	CaseNumber	Edit Delete
Contact	Name	Email	Phone	LastName	Edit Delete
Opportunity	Primary_Contact_Name__c	Primary_Contact_Email__c	Primary_Contact_Phone__c	Name	Edit Delete
Account	Name	Primary_Email__c	Phone	AccountNumber	Edit Delete

Add New Object

Add Visual Remote Assistant to your Cloud Objects - Manual Configuration

If for some reason you are unable to open the **Select object** dropdown field, please follow these steps in order to complete this step manually:

1. In the **App Launcher**, go to **Visual Remote Assistant - Admin**.
2. Go to **Salesforce Object Support**.
3. Click on **Add new object**.
4. Configure the following session invite fields:
5. Go to **Object Manager** in order to retrieve the object name.
   Note: You can correlate Visual Remote Assistant with multiple objects.
6. Click **Save**.
   The outcome looks as follows:

Object Name	Customer Name	Email	Phone	Reference Field	Action
Lead	Name	Email	Phone	LastName	Edit Delete
Case	Contact_Name__c	ContactEmail	ContactPhone	CaseNumber	Edit Delete
Contact	Name	Email	Phone	LastName	Edit Delete
Opportunity	Primary_Contact_Name__c	Primary_Contact_Email__c	Primary_Contact_Phone__c	Name	Edit Delete
Account	Name	Primary_Email__c	Phone	AccountNumber	Edit Delete

Add New Object

VISUAL REMOTE ASSISTANT - SESSION TYPES CONFIGURATION

VISUAL Remote Assistant 4.0 includes the following features:

1. Updating the Visual Remote Assistant Session Types
2. Video & Audio
3. Mobile Screen Mirroring
4. Desktop Sharing
5. Visual Remote Assistant to-go (Visual Remote Assistant on Mobile & Tablet)
6. Visual Remote Assistant for Field Services Technicians

In Visual Remote Assistant 5.0, the following session type is added:
Video Application

Updating Visual Remote Assistant Session Types

In order to update the Visual Remote Assistant Session Types list, it's required to access the Visual Remote Assistant configuration tool

Visual Remote Assistant Configuration

In order to allow the Visual Remote Assistant Audio channel, follow these steps:

1. Go to **App Launcher** → search for **Visual Remote Assistant Configuration**
   The following message should appear - **Session Types Updated.**

Video & Audio

Visual Remote Assistant 4.0 includes an Audio channel option as part of a Visual Remote Assistant Live Video session.

A new toggle is added for Video sessions only - **Audio** toggle.

If the agent enables the **Audio** toggle, then the Visual Remote Assistant session allows both the Agent and the End User to communicate via an audio channel.

Visual Remote Assistant Configuration

In order to allow the Visual Remote Assistant Audio channel, follow these steps:

1. Go to **App Launcher** and search for Visual Remote Assistant Configuration.

2. Go to **Configuration → Step 2 → Features Configuration → Audio → Enable Audio = Enabled.**

Desktop Sharing

Visual Remote Assistant 4.0 includes a new session type - **Desktop Sharing**. This session type allows the PC user to share his desktop screen with the Visual Remote Assistant Agent.Sending an invitation to this session type is available only via Email.

Visual Remote Assistant Configuration

In order to allow the Visual Remote Assistant Audio channel, follow these steps:
1. Go to App Launcher → search for Visual Remote Assistant Configuration
2. Go to Configuration → Step 2 → Features Configuration → Visual Remote Assistant Session Type by Platform - Configuration → Desktop Sharing Configuration → Desktop → Enable

Mobile Screen Mirroring

Visual Remote Assistant 4.0 includes a new session type - **Mobile Screen Mirroring**. This session type allows a mobile user to mirror his entire mobile screen device.

Sending an invitation to this session type is available only via SMS.

Visual Remote Assistant Configuration

In order to allow Visual Remote Assistant Audio channel, follow these steps:
1. Go to App Launcher → search for Visual Remote Assistant Configuration
2. Go to Configuration → Step 2 → Features Configuration → Visual Remote Assistant Session Type by Platform - Configuration → Mobile Screen Mirroring → Desktop → Enable

Video Application

Visual Remote Assistant 234.1 includes a new session type - **Video Application**. This session type allows the end user to connect to a Visual Remote Assistant video session via a native video application. The native video application includes full camera control: - Zoom in & out via pinch gesture, focus & exposure, audio destination selection and background activity support.

Sending an invitation to this session type is available only via SMS.

Visual Remote Assistant Configuration

In order to allow Visual Remote Assistant Audio channel, follow these steps:
1. Go to App Launcher → search for Visual Remote Assistant Configuration

Go to Configuration → Step 2 → Features Configuration → Visual Remote Assistant Session Type by Platform - Configuration → Video Application → Desktop → Enable

MOBILE AND TABLET SUPPORT

Visual Remote Assistant 4.0 includes the ability for Salesforce agents to use Visual Remote Assistant on-the-go (Mobile & Tablet).

Visual Remote Assistant will be available within Salesforce official application as a Lightning component.

Note: Since the Salesforce dashboard on mobile web supports only Classic mode, using the application for Visual Remote Assistant is mandatory.

In order to allow Visual Remote Assistant to run on Mobile & Tablet devices, go to:

Setup → New Salesforce Mobile App QuickStart → New Salesforce Mobile App for Tablet → Give All Users Access → Enable the toggle

Guidance for Salesforce Mobile Application

To download the Salesforce official application, refer to the following URLs:

- Apple App Store - Salesforce on the App Store
- Google Play Store - Salesforce - Apps on Google Play

Visual Remote Assistant Configuration

In order to allow Visual Remote Assistant to run on mobile & tablet, follow these steps:

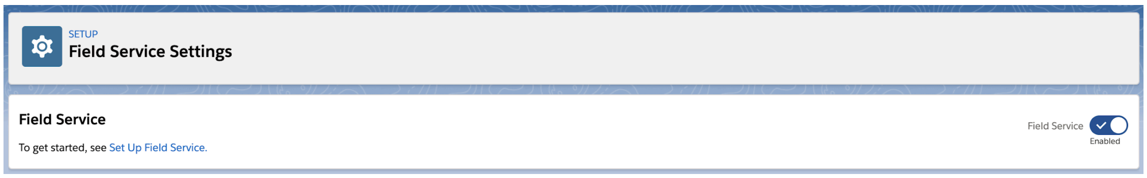
1. Go to App Launcher →Search for Visual Remote Assistant Configuration
2. Go to Configuration → Step 2 → Features Configuration → Visual Remote Assistant to-go → Mobile & Tablet Support → Enable Visual Remote Assistant on Mobile & Tablet = Enabled

FIELD SERVICES CONFIGURATION

Visual Remote Assistant is designed to operate on Service Cloud. Take the following steps in order to configure the prerequisites required.

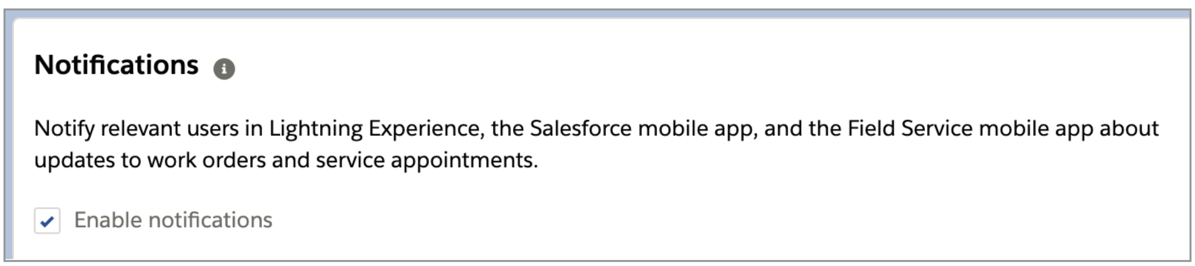
Enable Field Services (Service Cloud only)

Go to Setup → Service → Field Service Settings → Field Service → enable the toggle



Enable Notification:

Go to Setup → Service → Field Service Settings → Notifications → enable the **Enable Notifications** toggle

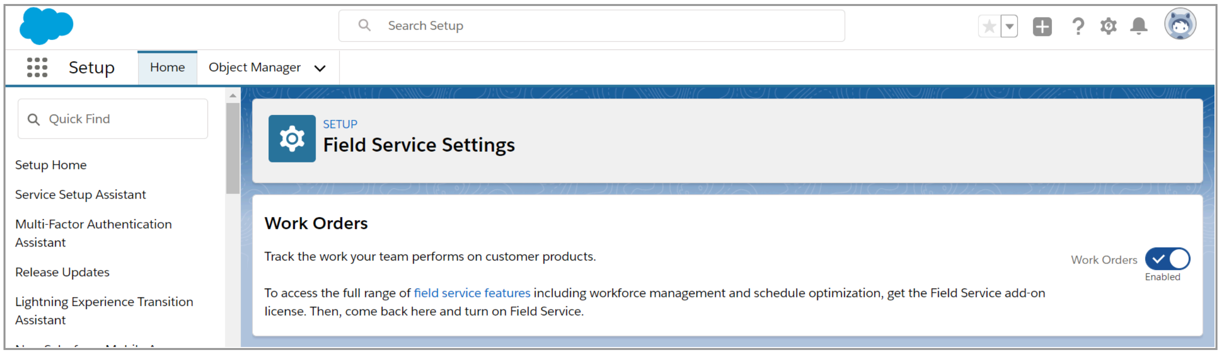


FSL Licensing - Add On License Configuration (Service Cloud only)

Note: If the Add On License is already enabled in your Salesforce organization - then this toggle will not appear.

IF THIS TOGGLE DOES NOT APPEAR - PLEASE SKIP THIS STEP

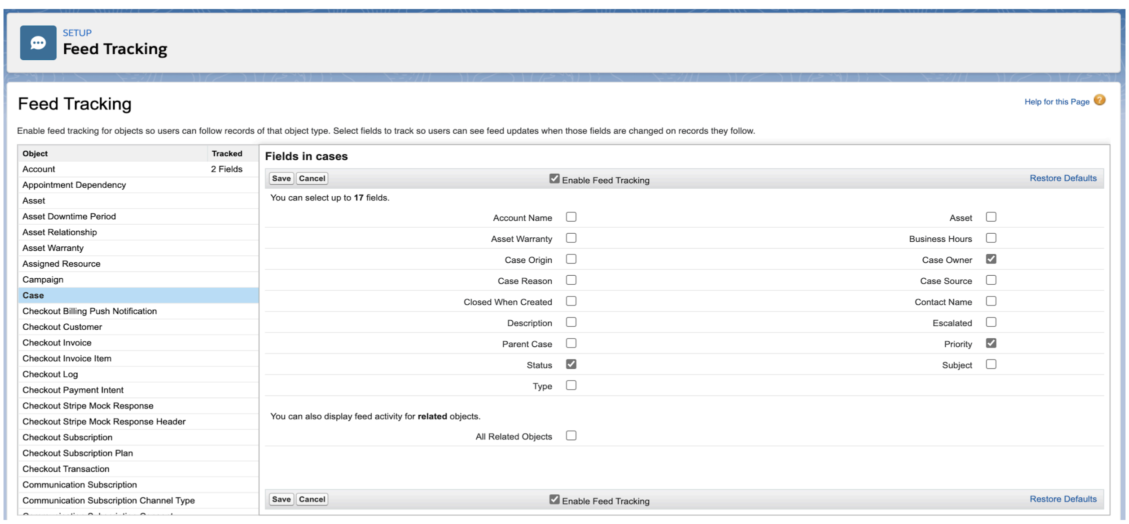
Go to **Setup** → **Feature Settings** → **Service** → **Field Service** → **Field Service Settings** → **Field Service** → **Work Orders** → enable the toggle



FEED TRACKING CONFIGURATION

Add the following text as a tooltip on the button:

1. Go to Setup → Feature Settings → Feed Tracking:
2. On the **Objects** table on the left, search for the object that should be supported for Visual Remote Assistant (e.g. Case \ Work Order \ Service Appointment).
3. For each object, enable the toggle called **Enable Feed Tracking**.



4. Verify that it is enabled for each of the Visual Remote Assistant supported objects.

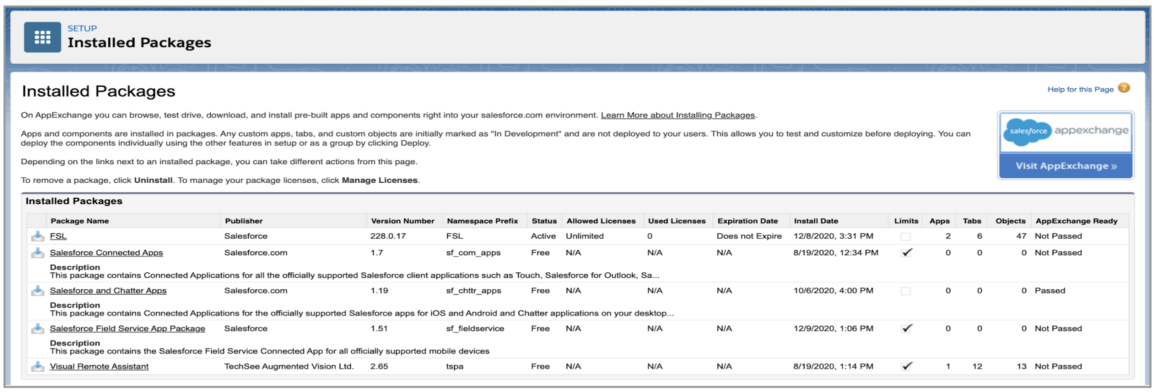
SFS MANAGED PACKAGE NOTIFICATION (FIELD SERVICE ONLY)

Follow this section's guidelines to add Chatter & Push Notifications.

Prerequisites

To use Visual Remote Assistant with the SFS application, the following prerequisites are required:

1. Go to **Setup** → **Installed Packages**:



2. Verify that the following package is listed as **Installed** – **FSL**.
3. If the **Field Service lightning package** is not installed, please refer to the following link to install it on your SF org - https://help.salesforce.com/s/articleView?id=service.pfs_install.htm&type=5

Salesforce Field Service App Package

To install the Salesforce Field Service App Package app:

1. Use the following installation link - https://help.salesforce.com/articleView?id=sf.mfs_push_notifications.htm&type=5
2. Go to Step 1 and install the **Connected App**.

Visual Remote Assistant configuration for SFS

Once the package is installed, take the following steps:

Salesforce Field Service for iOS - Connected App - Edit Policies - IP Relaxation

1. Click on the **Manage Connected App** link shown at the top of the screen.
   You are redirected to Setup → Manage Connected App page
2. Click on the **Salesforce Field Service for iOS** connected app from the list shown.
3. Click on **Edit Policies**

IP Relaxation

1. Go to OAuth Policies → IP Relaxation
2. Select **Relax IP restrictions** from the dropdown list.

Salesforce Field Service for Android - Connected App - Edit Policies - IP Relaxation

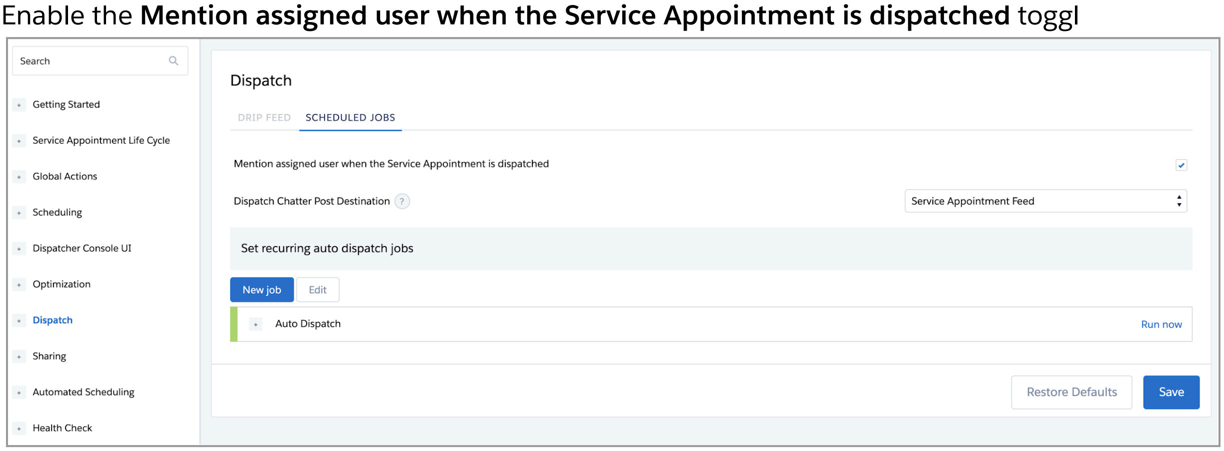
1. Click on the **Manage Connected App** link shown at the top of the screen.
   You are redirected to Setup → Manage Connected App page
2. Click on the **Salesforce Field Service for Android** connected app from the list shown.
3. Click on **Edit Policies**.

IP Relaxation

1. Go to OAuth Policies → IP Relaxation
2. Select **Relax IP restrictions** from the dropdown list

Salesforce Field Services Settings - Allow Chatter Notifications

1. Click the **App Launcher** icon.
2. Search for **Field Service Settings.**
3. Click on **Dispatch** from the left menu bar.
4. Go to the **Scheduled Jobs** tab.
5. Enable the **Mention assigned user when the Service Appointment is dispatched** toggl



Visual Remote Assistant Configuration

In order to allow Visual Remote Assistant for Field Services, follow these steps:

1. Go to **App Launcher** → search for **Visual Remote Assistant Configuration**
2. Go to **Configuration** → **Step 2** → **Features Configuration** → Invite Mobile Field Services Technicians to Visual Remote Assistant Sessions → **Enable Visual Remote Assistant For Mobile Field Service Technicians = Enabled**

SFS APP EXTENSION (FIELD SERVICE ONLY)

VISUAL REMOTE ASSISTANT CAN BE TRIGGERED FROM THE SALESFORCE FIELD SERVICE (SFS) APPLICATION.

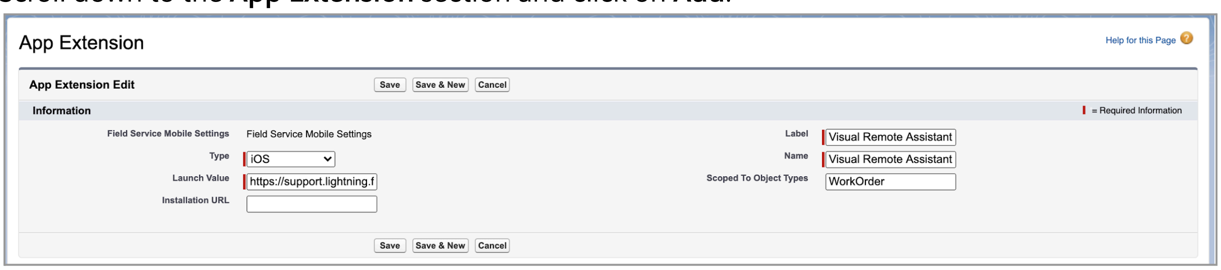
Visual Remote Assistant triggering is feasible via **App Extension** which adds custom items to the **Action** menu.

When the SFS mobile technician clicks on the custom added item, the technician is redirected from the SFS app to the Salesforce application - directly to the relevant Work Order on which the technician is working.

Note: If your organization does not use the SFS application - you can skip this part.

Configuration Steps

1. Go to **Setup** → **Service** → **Field Service** → **Field Service Mobile** → **Field Service Mobile Settings.**
2. Scroll down to the **App Extension** section and click on **Add**.



3. Two configuration steps are required - one for iOS and one for Android.

Parameter	Value	Comments
Type	**iOS**	
Launch Value	https://<your SF myDomain>.lightning.force.com/lightning/r/WorkOrder/{!Id}/view	Replace **<your SF myDomain>** with the actual SF myDomain
Label	Visual Remote Assistant	Customizable
Name	Visual Remote Assistant	Customizable
Scoped To Object Types	WorkOrder	

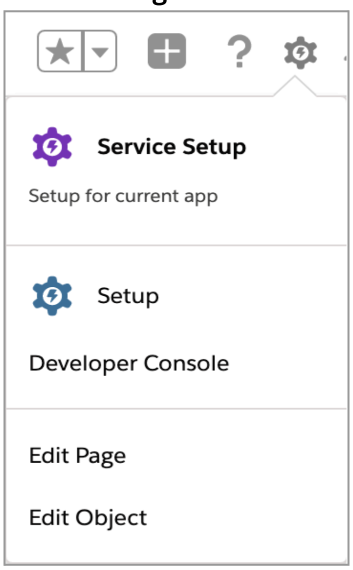
Parameter	Value	Comments
Type	**Android**	
Launch Value	https://<your SF myDomain>.lightning.force.com/lightning/n/tspa__Visual_Remote_Assistant_Mobile_Dashboard?c__recordId={!Id}	Replace **<your SF myDomain>** with the actual SF myDomain
Label	Visual Remote Assistant	Customizable
Name	Visual Remote Assistant	Customizable
Scoped To Object Types	WorkOrder	Choose the relevant object type

CUSTOMIZE PAGE LAYOUT FOR MOBILE & TABLET

Add Invite Form and Visual History to Desktop and Mobile your Page Layout

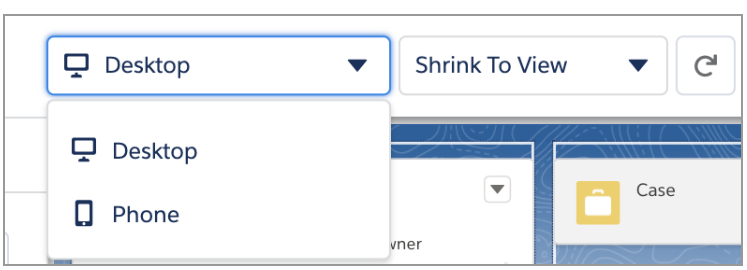
Now that you have successfully added Visual Remote Assistant to the desired Salesforce objects and added the Mobile & Tablet configuration, the next step is to customize the page layout of the supported object by adding the **Visual Remote Assistant Invite Form** component:

1. Go to the relevant object to which you added support (e.g. Work Order, Case, etc.)
2. Click on the **Setup Gear** icon at the top right corner of the screen
3. Click **Edit Page**.

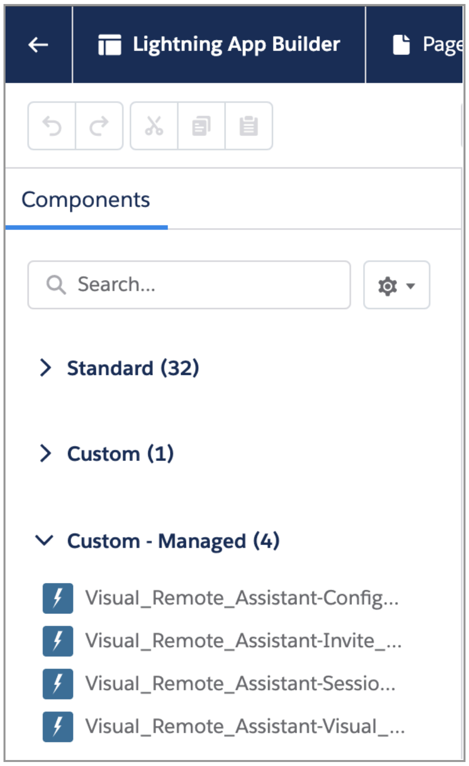


Desktop Layout

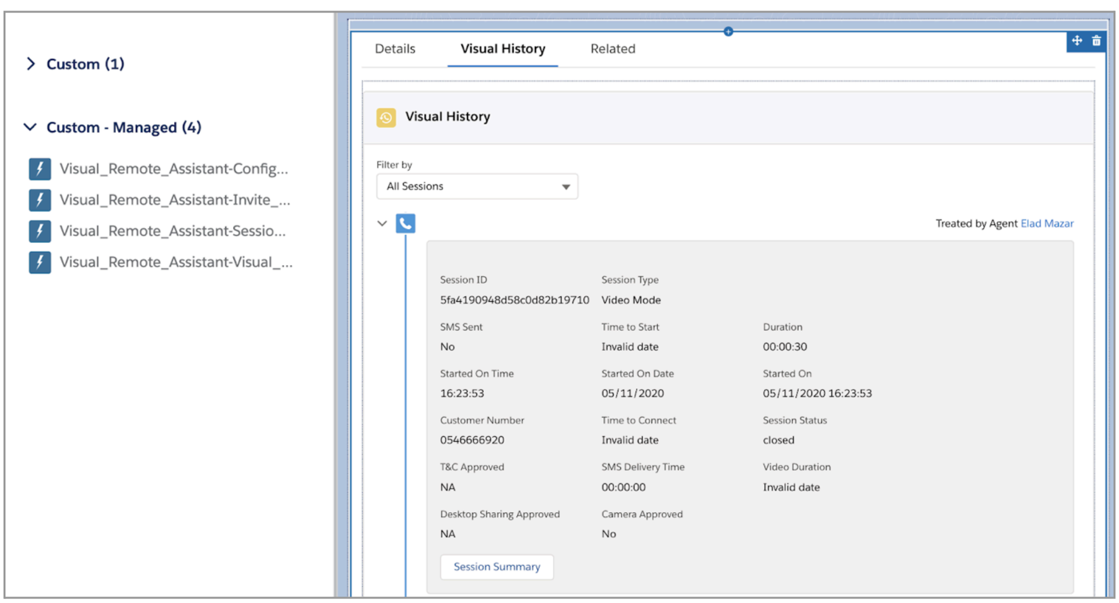
1. In the layout view, choose **Desktop**



2. In the left bar menu, the following option will appear under **Custom - Managed**

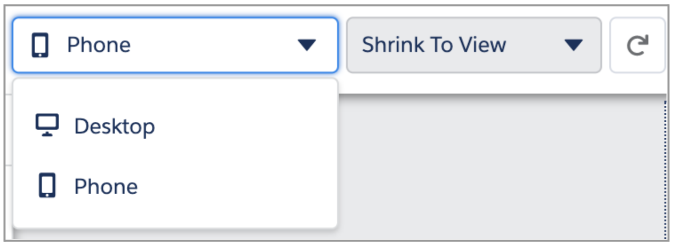


3. Drag & drop the **Visual_Remote_Assistant-Invite_Form** into the main screen layout
4. Drag & drop the **Visual_Remote_Assistant-Visual_History** into the main screen layout

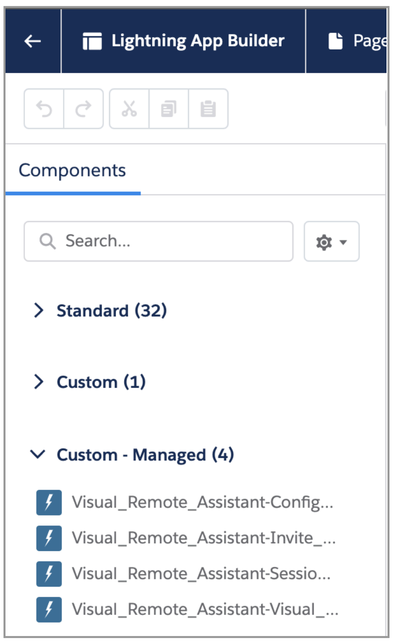


Mobile Layout

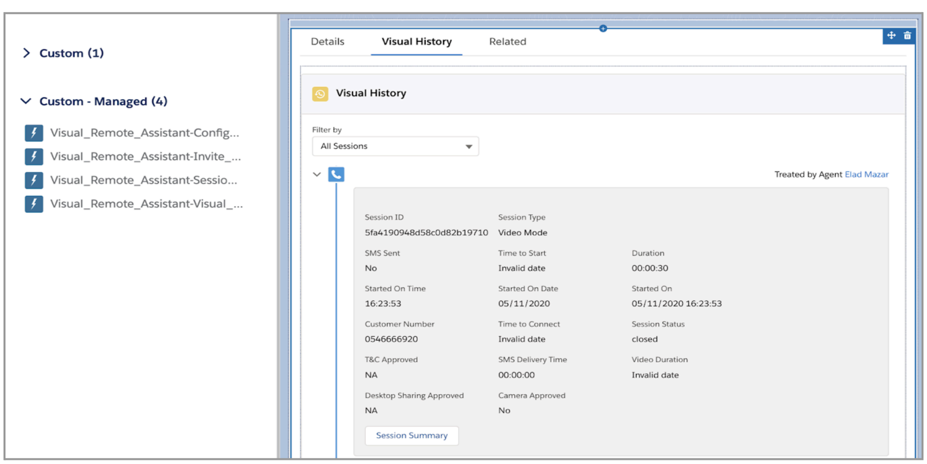
1. In the layout view, choose **Phone**



2. In the left bar menu, the following option will appear under **Custom – Managed**.



3. Drag & drop the **Visual_Remote_Assistant-Invite_Form** into the main screen layout.
4. Drag & drop the **Visual_Remote_Assistant-Visual_History** into the main screen layout.



Embedded Services/WebChat(Live Agent/ChatBot)

In Digital Engagement, once an End User requests transfer to an Agent from Einstein Bot or without the bot, the Web Chat initiates between the Agent and End User. Visual Remote Assistant allows Agents to initiate visual sessions with customers.

Prerequisite

The Admin needs to make sure that Web Chat/embedded services and omnichannel are already configured as prerequisites. If they are not, then follow the resource below to configure it:

- Omnichannel
  https://help.salesforce.com/articleView?id=sf.omnichannel_enable.htm&type=5
- Web Chat
  https://help.salesforce.com/articleView?id=sf.live_agent_intro_lightning.htm&type=5
- https://trailhead.salesforce.com/en/content/learn/projects/build-an-einstein-bot/prep-for-einstein-bots

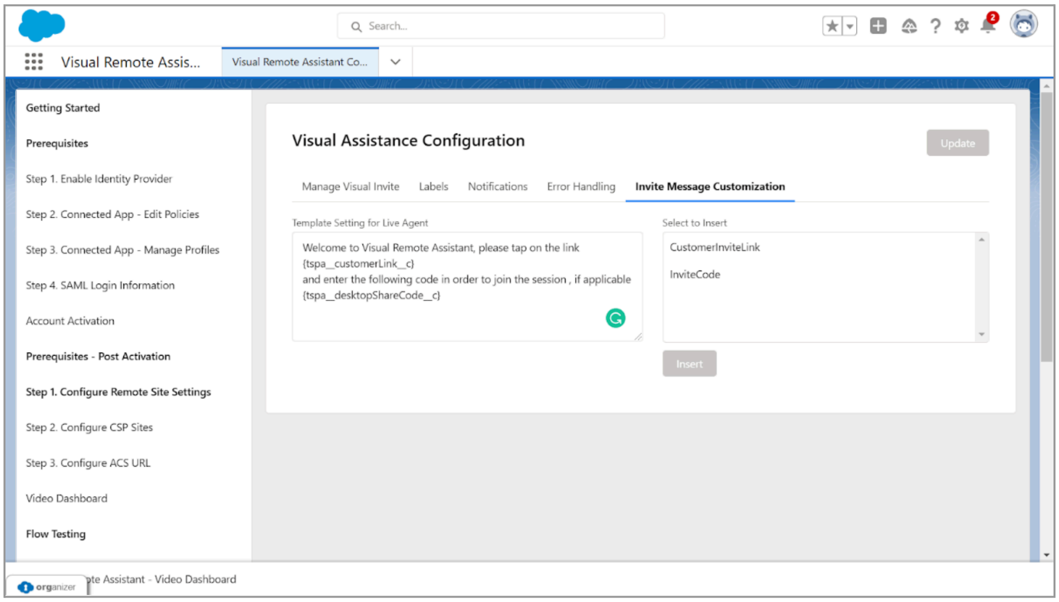
Configure Visual Remote Assistant for Web Chat

To configure the Visual Remote Assistant, the Admin sets up the template for a **Chat Notification** using **Visual Remote Assistant Configuration**.

Configure Notification Template

1. Click the **App Launcher**, then first type and then select *Visual Remote Assistant Configuration*.
2. From the left panel, select **Step 3. Visual Assistant Configuration**.

3. Select **Invite Message Customization** tab.

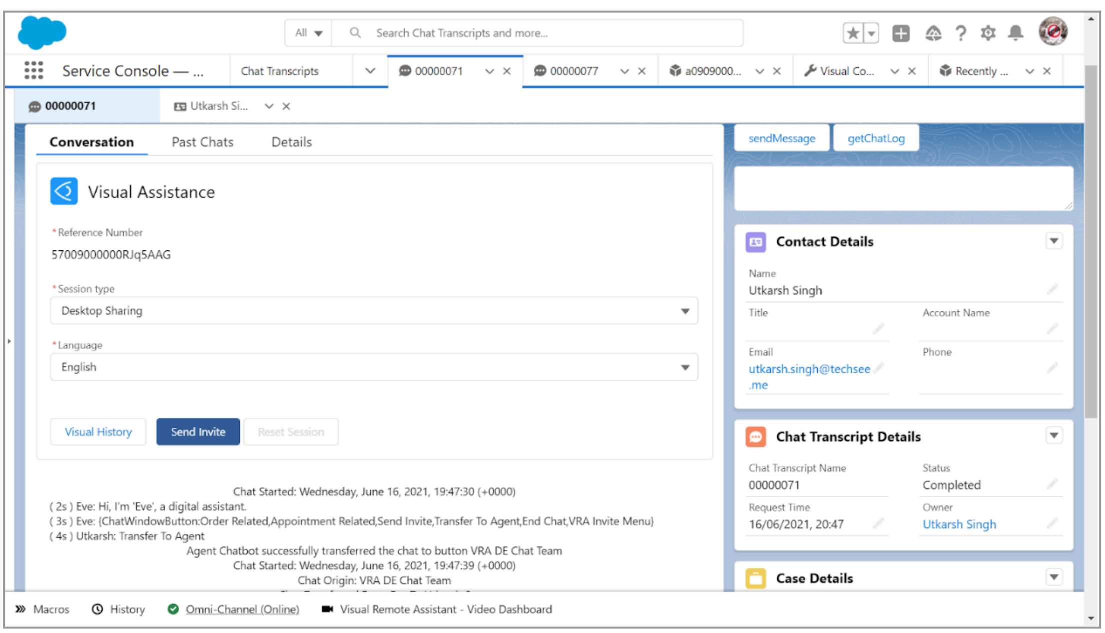


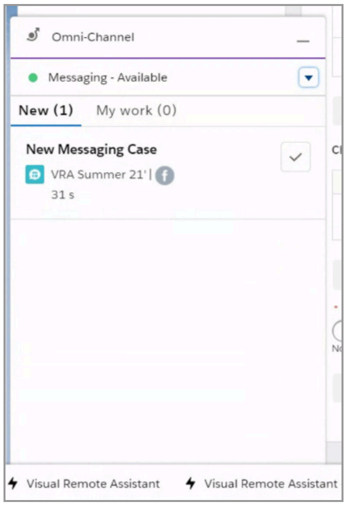
4. The Admin can create or modify the template using the left panel. Once the text is updated, click **Update** in the top right corner.

Note: The merge fields from the right section must be included in the template.

Update Page Layout

From the **Visual Remote Assistant Configuration** page, go to the step **Adding Visual Remote Assistant to Salesforce Objects** and follow the steps to add the *Digital Engagement for Visual Remote Assistant* component in the lightning record page of the **Chat Transcript** object.




Omni-Channel
Messaging - Available
New (1)
My work (0)
New Messaging Case
VRA Summer 21'
31 s
Visual Remote Assistant
Visual Remote Assistant

SMS Gateway

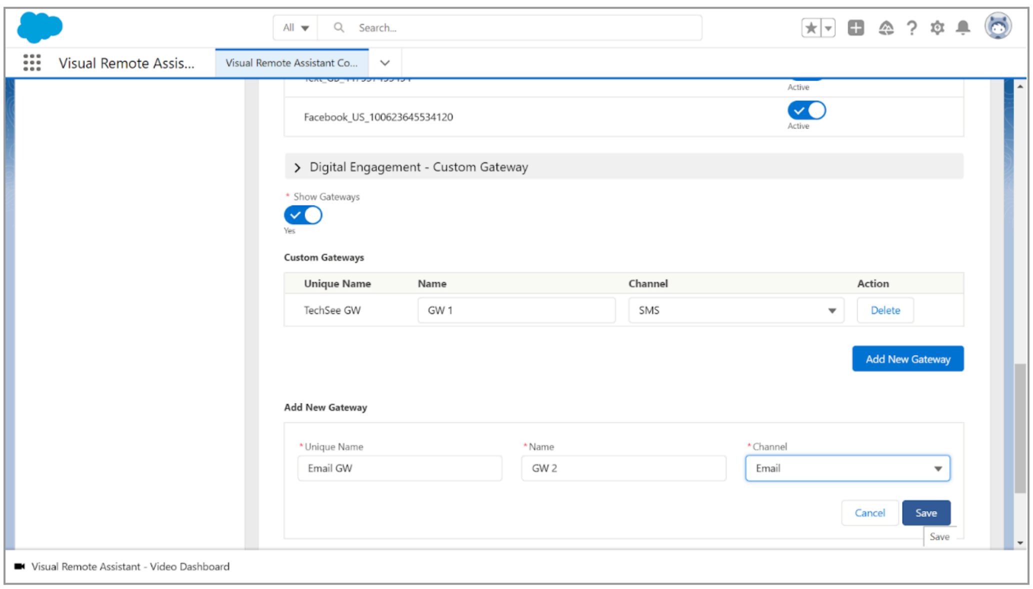
After working through the previous sections, the Admin can configure the Visual Remote Assistant and add an SMS gateway as a Channel in the **Visual Remote Assistant - Invite Form**.

Prerequisite

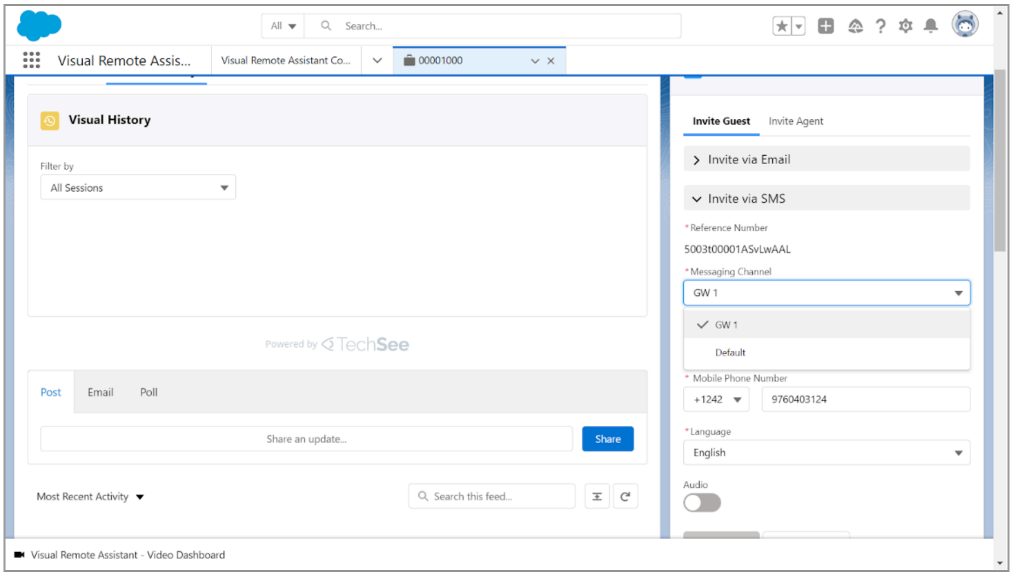
SMS gateways should be preconfigured and integrated in the Salesforce organization.

Configure Gateway in Visual Remote Assistant

- Click the **App Launcher**, then type, and then select **Visual Remote Assistant Configuration**.
- From the left panel, select **Step 2. Features Configurations**.
- Scroll to section **Digital Engagement - Custom Gateway**.
- Click on **Add new Gateway to add the gateway channel in the Visual Remote Assistant**.



- **Unique Name:** The name which is saved in the Visual Remote Assistant-Session Invites records which represents a session.
- **Name:** Represents the user the value in Channel dropdown of the Invite form.
- **Channel:** Represents the invite via the section in the Invite form, and defines in which invite the gateway will be visible.
- From the left panel, select **Step 3. Visual Assistant Configurations** and in the session invite delivery method, multiselect the picklist. Move the Gateway option to selected.
- Once this is configured, the Invite form looks like this:



The messaging channel dropdown represents the gateway available for that Invite via section and the default value represents the Visual Remote Assistant gateway.

Now the Admin can build a Process Builder or Apex trigger on the **Visual Remote Assistant-Session Invites object**. Fields to be considered in automation:

- Digital Engagement(tspa__Digital_Engagement__c) → value is always “Custom Gateway”
- DE Channel/Gateway(tspa__DE_Channel__c) → Unique name of gateway
- Country Code(tspa__Country_Code__c) Country code from invite via SMS
- Phone Number(tspa__Phone_Number__c) → Phone from invite via SMS
- Email(tspa__Email__c) → Email from invite via Email

VISUAL REMOTE ASSISTANT IMAGES LIBRARY

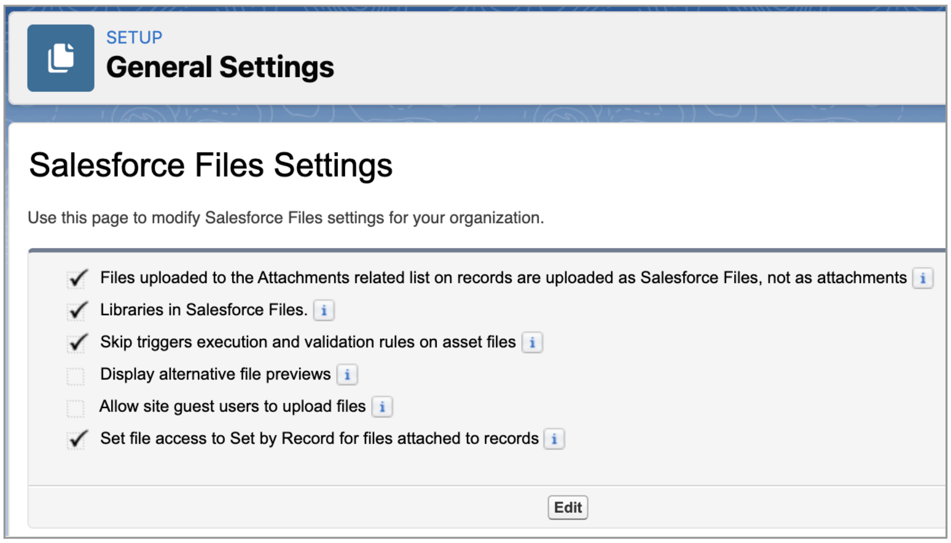
The visual library stores picture files that can help you during several different sessions. A picture of a device, for example, may help the End User find the required device faster and easier than trying to describe it verbally. The pictures are available in the Visual Library tab in the session window, where you can click Select next to the picture that you want to be shown to the End User.

Images Library Prerequisites

Enable the following settings:

1. Go to **Setup** → **Feature Settings** → **Salesforce Files** → **General Settings.**

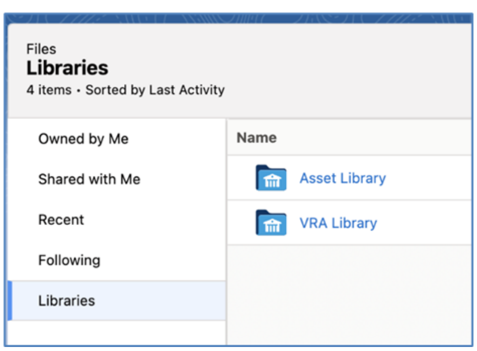
2. Enable the **Libraries** in Salesforce Files:



Upload Image Files to Salesforce File Object

1. Go to **Files**

2. Add Library files and folders for future use.
   By default, when Visual Remote Assistant is installed, the following folder is created - **Visual Remote Assistant Library.**



VISUAL REMOTE ASSISTANT SCHEDULING

VRA Scheduling allows you to schedule future VRA meetings with your customers using Salesforce Field Service or Salesforce Scheduler. With this feature configured, Agents can create Service Appointments for VRA meetings and schedule them. A short time before the scheduled meeting, the End User will receive an email inviting them to a virtual lobby where they can wait until the Agent is ready to start the meeting. The Agent will receive a notification reminding them that the meeting is about to begin.

VRA Scheduling Prerequisites

To install and configure the VRA scheduling, you must perform these prerequisite steps - you must install the VRA package and configure it, enable Field Service, and install either Salesforce Field Service or Salesforce Scheduler.

Install Scheduling for your organization

1. Verify you have VRA version 5.25 or newer installed on your Salesforce org.
2. Enable Field Service. For more information Click Here.
3. Install Salesforce Field Service or Salesforce Scheduler on your organization. In order to install the Salesforce Field Service, Click Here. In order to install the Salesforce Scheduler, Click Here.

Install VRA Scheduling

The VRA Scheduling feature requires a separate package from the VRA package since it requires several prerequisite steps that the VRA package does not. Specifically, you do not need the Service Appointment object for regular VRA meetings. However, as mentioned above, the Service Appointment object is essential for the scheduling of VRA meetings.

If you install the VRA Scheduling package without having the Service Appointment object, you will receive an error message. If this happens, please go back to the “Enable Field Service” prerequisite step above.

Click Here and install the package. Supported from version 5.25 and onwards

Note: Make sure you enable Field Service. Please go to the App Launcher, search for Service Appointment, and make sure you have the object on your org.