RingCentral for Salesforce

User Guide

[For version 6.8.0 and above]

Contents

Introduction

About RingCentral for Salesforce

RingCentral for Salesforce provides seamless integration between Salesforce.com and your RingCentral services to enable improved customer retention, greater agent productivity, and advanced business processes.

It offers these features:

- Full call history for concurrent calls and historical calls*
- Active Call Control during the phone call*
- New Language supports: IT, PR, JP, CN*
- Call log notification*
- Schedule a RC meeting in Salesforce*
- Automatic way to log Calls, Notes, and SMS*
- Available in both Classic and Lightning view of Salesforce
- Easy click-to-dial by clicking on any phone number in Salesforce
- Instant screen pop displaying the caller's information as soon as a call arrives
- Automatic call dispositions for quick call logging
- SMS capabilities make texting easy and reliable
- Accurate call logs and SMS logs saved to the corresponding record
- New records—Accounts, Contacts, Leads, Cases (need phone field) can be easily created while on call or having SMS conversations

* new feature in RingCentral for Salesforce v6.0

About this Guide

This guide is specifically designed for end users of RingCentral for Salesforce. This guide is not intended for system/network administrators and does not provide any information on how to set up the application on user desktops or how to configure the Salesforce.com instance to be able to use this application. This user guide will show you how to use this application and provide known issues/limitations of the application as well as some basic troubleshooting questions and answers.

This User Guide for Salesforce Lightning is specifically for RingCentral for Salesforce version 6.x. The User guide for Salesforce Lightning for older (5.x) versions can be accessed from here. All related guides for RingCentral for Salesforce can be accessed from the Salesforce AppExchange.

Note: RingCentral for Salesforce version 5.x, 6.0, and later includes Salesforce Mobile App. This enables you to make calls via the Salesforce Mobile App with RingCentral's quality phone services. If your Salesforce is already configured for Salesforce Mobile App,
then no additional steps are required.

Requirements

Before using RingCentral for Salesforce, you need to install RingCentral desktop app, to make all functions work of you have chosen "Call with Softphone" as the outbound calling options in Settings (refer to Options section on page 4).

You can download the desired app by clicking on RingCentral Phone or RingCentral App

Salesforce Edition:
- Professional, Enterprise, Unlimited

Other System Requirements:
- RingCentral Office Premium and above
- Windows XP+, Vista, Windows 7 and 8 - 32bit/64bit
- MAC OS X 10.8 Mountain Lion+
- IE11+ / IE Edge 38+/ Firefox 52+/ Chrome 56+/ Safari 6.0.5+ (Classic only)
- RingCentral Softphone
- .Net Framework 3.5
- 10-digit phone system

RingCentral®

Basics

For optimal user experience, ensure that:

1. The browser you are using is updated to the latest version.
2. If you are using Safari as your browser, do the following steps to avoid issues while logging into RingCentral for Salesforce. From the main menu, **click on Safari > Preferences > Privacy > uncheck Prevent cross-site tracking**
2. You have set the correct number as your RingCentral Direct Number—you will be making and receiving calls from this number through the Salesforce.com interface. You can find your RingCentral Direct Number in the RingCentral Service web at **My Settings** > **Phones and Numbers** > **Direct Numbers**.
3. Login to Salesforce.com through the browser; the App will work only while the user is logged in to Salesforce.com.
4. Login to RingCentral for Salesforce through Salesforce.com. Use your RingCentral Direct Number for the user name and your RingCentral password.
5. Your browser has its pop-up blocker disabled for the Salesforce.com site.

Options

You can get to the options by clicking in the gear icon in the top navigation bar.

1. **Calling** (outbound calling option, Figure 2 and 3)
   - **Call with Softphone:** With this option selected, when you make an outgoing call, your RingCentral for Desktop app will be initiated to place the call.
     Important: Note that RingCentral for Salesforce integration now works with both RingCentral Softphone and RingCentral App. You can download the desired app by clicking on RingCentral Phone or RingCentral App
   - **Connect from a different phone:** With this option selected, you'll be asked to enter a phone number. When you make an outbound call RingCentral will ring you at the phone number you entered before connecting the called party.
   - **Press 1 to start a call:** When you make an outgoing call from your specified phone number, RingCentral will first call you at your number. When you answer the call, you will have the option to press 1 before the call is connected to the other party. If this option is not enabled, RingCentral will call your number and the dialed number simultaneously.
2. **Region:** Select the country you are physically located in. This country code will be used for local dialing. If you select US/CA as your country, you will need to further specify an area code before you could dial a 7-digit local phone number. (Figures 2 and 3)
3. **Status:** User can setup his/her status here including Available, Busy, Do not Disturb, and Invisible.
4. **Accept call queue calls:** When this option is selected, the call queue configuration set up in Service Portal can be applied here.
5. **Auto log calls:** When this option is selected, RingCentral will automatically create a call log in the Activity History for any inbound or outbound call. If this option is not selected, a call log will be created only if you press the **Create Log** button in the logging area during or after the call.
6. **Auto log notes:** When this option is selected, the incoming calls' customized fields data will be logged automatically. The customized fields can be set by admin account via the **AdminUI**. (Figure 1)
7. **Auto log SMS:** When this option is selected, RingCentral will automatically create a call log in the Activity History for SMS conversations. The SMS exchanged with the same contact/lead/opportunity within the same day will be saved within one log. If this option is not selected, an SMS log will be created only if you press **Save** when viewing the SMS conversation.
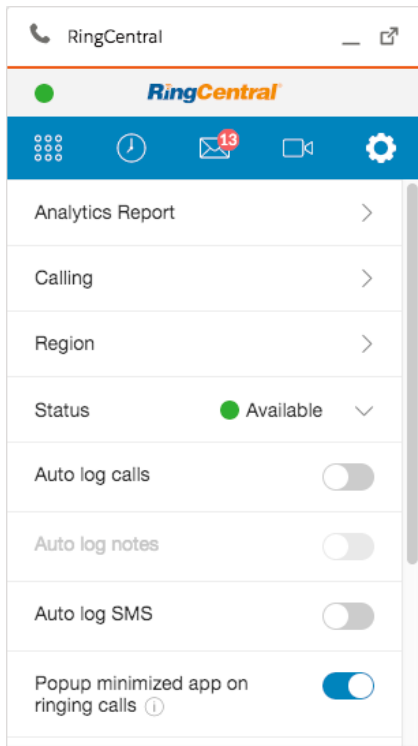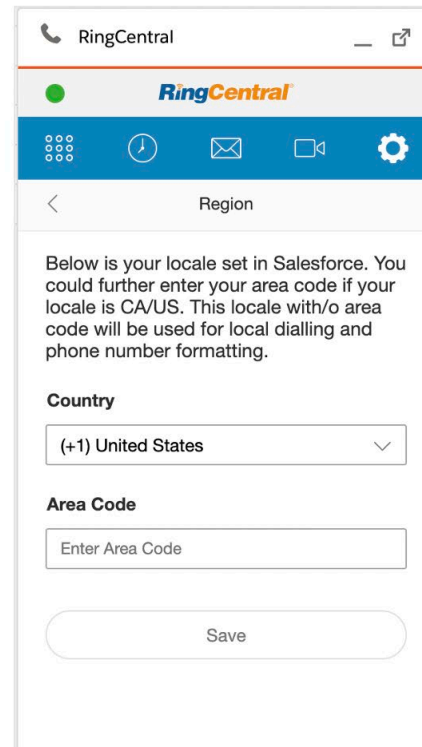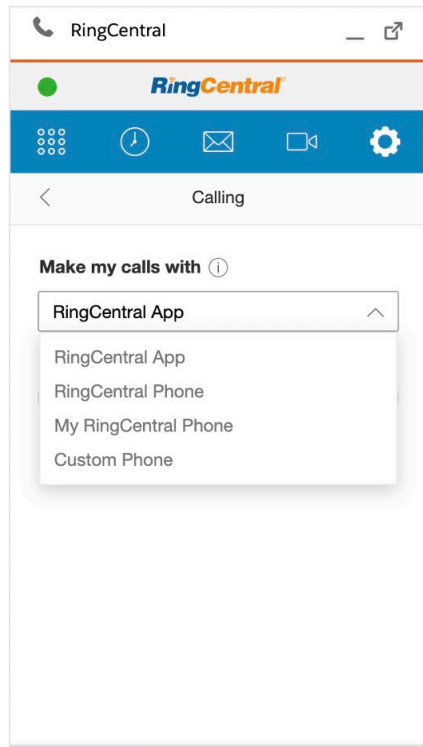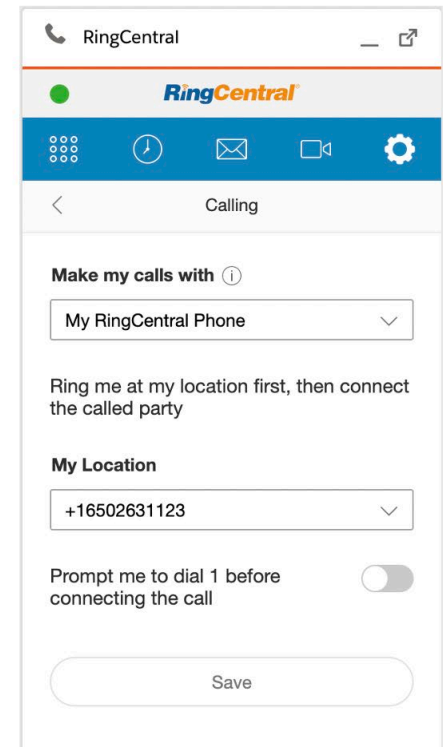
4

Figure 1—Settings (Lightning)
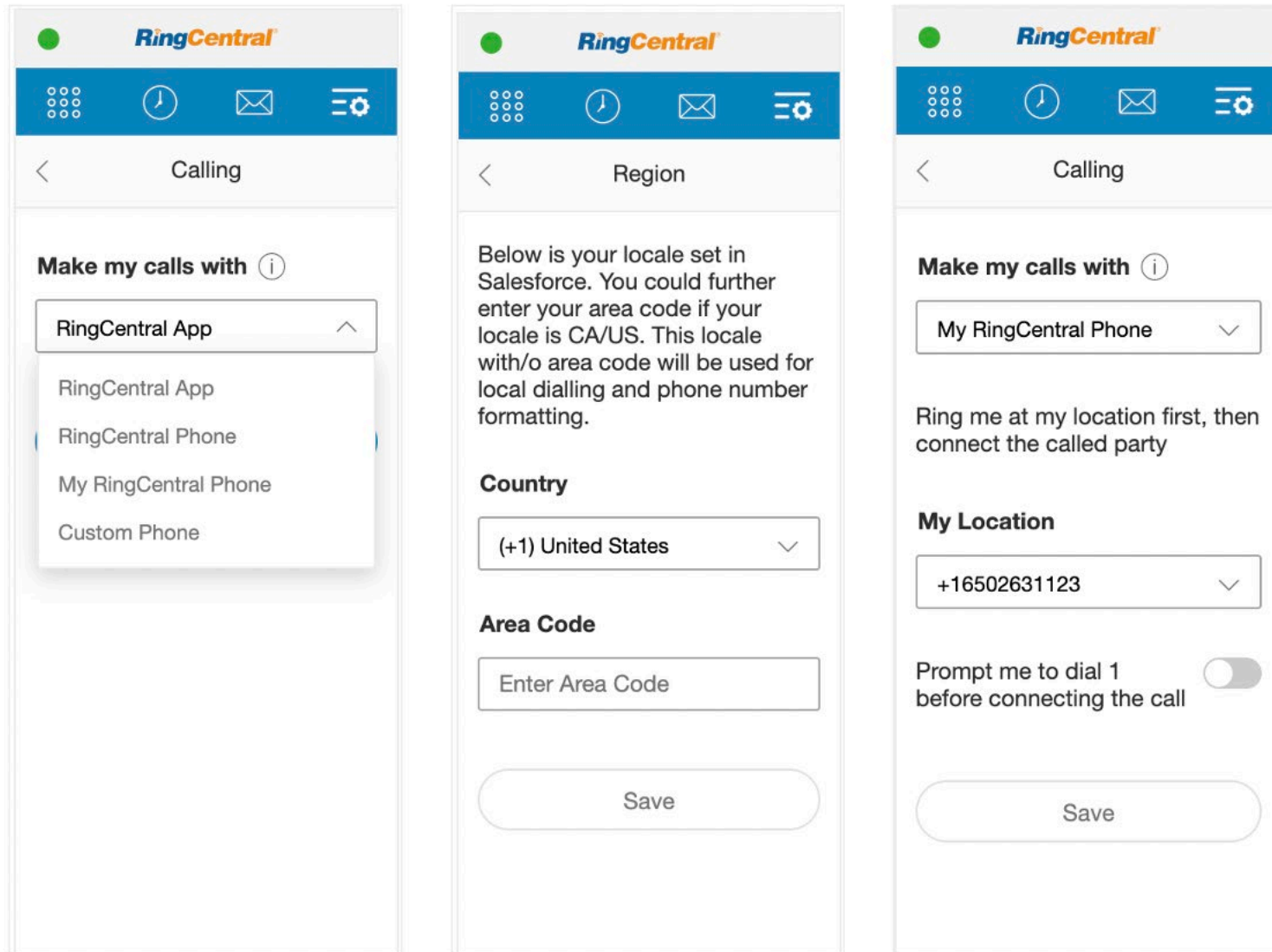
Figure 2—Settings (Lightning)

Figure 3—Settings (Classic)

Login

Open your browser and login to your Salesforce account. If you haven't logged in RingCentral for Salesforce app, you'll see the **Sign In** button. Click the button to go to the login page. Type in your RingCentral Direct Number or your main company number with Ext, and your RingCentral account password. (Figure 4—6)
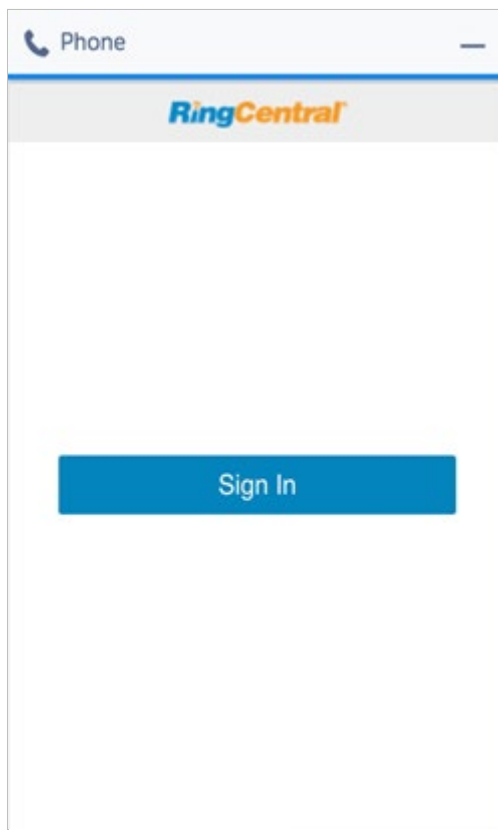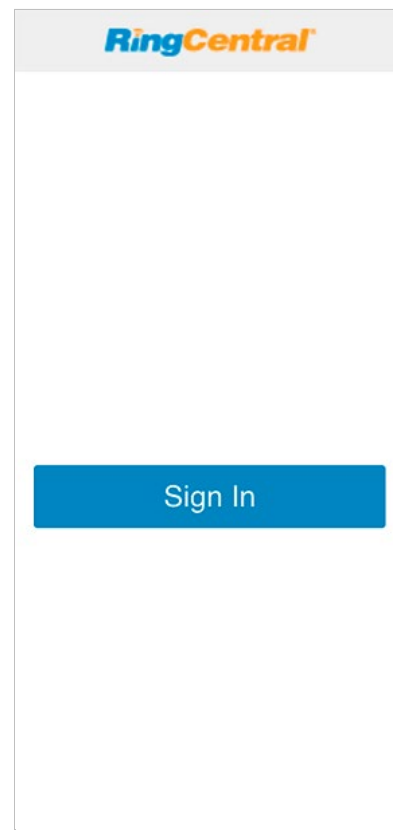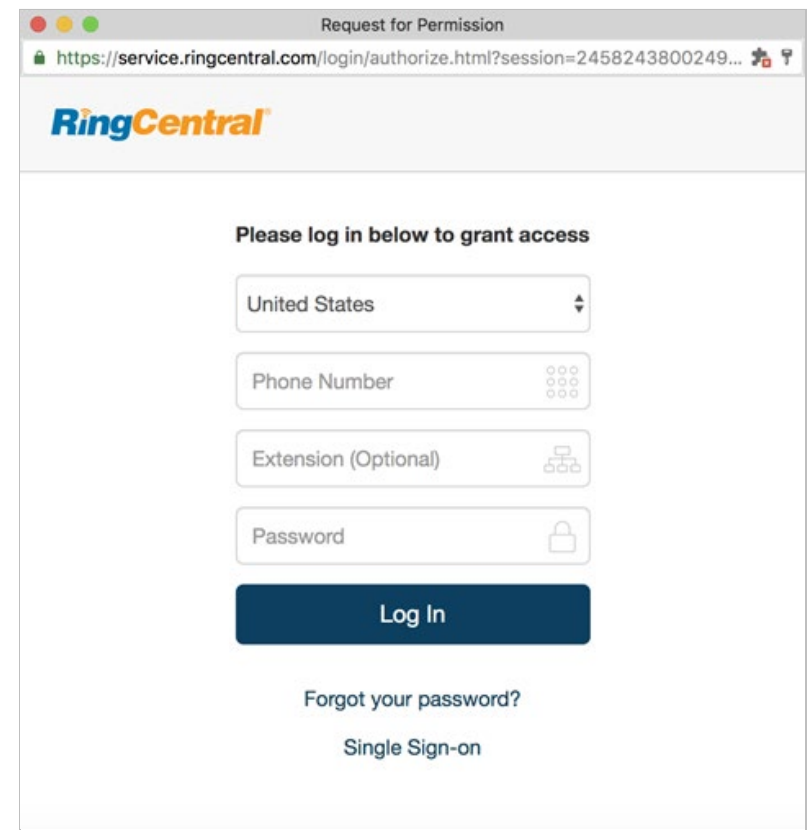

Figure 4—Welcome Page (Lightning)

Figure 5—Welcome Page (Classic)

Figure 6—Login Popup

Once the login is successful, the app layout will change to as below.
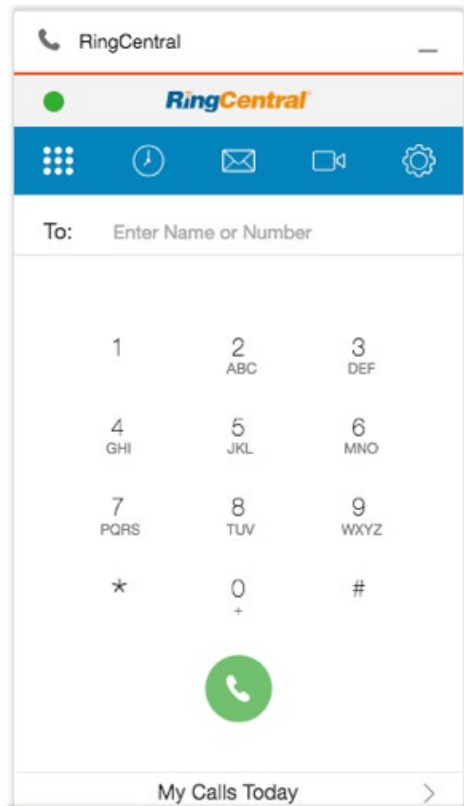
Figure 7—Lightning

Figure 8—Classic

Placing Calls

There are two ways you can make an outgoing call:
1. Type in the number you want to dial in the dial pad (Figure 9)
2. Use the click-to-dial feature (Figure 10)

Figure 9—Lightning

Figure 10— Classic

If you choose to **Call with Softphone**, your RingCentral for Desktop will be initiated to place the call. If you select to **Connect from a different phone**, RingCentral will first call you at your specified number and the app dialer will change to the screen shown below during the time the call is being connected.
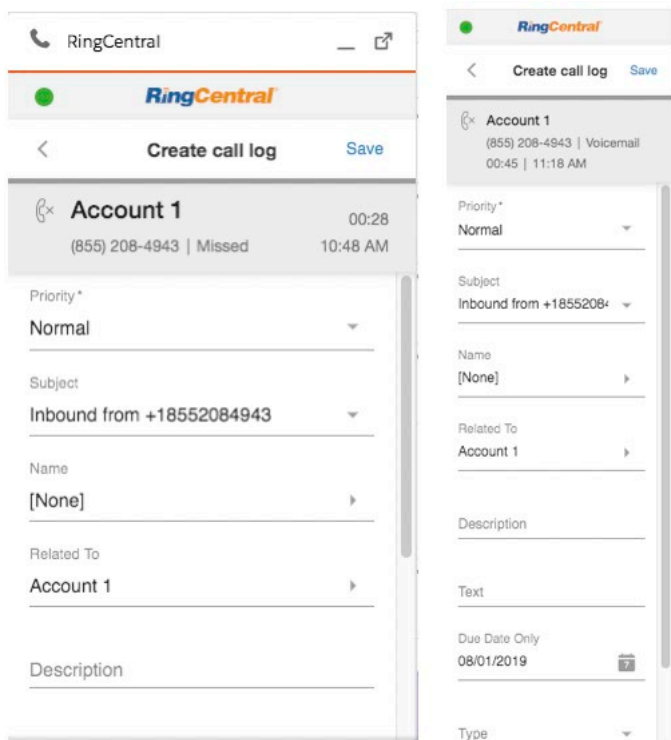
Once you answer the call, depending on your settings, you may be prompted to press **1** before the call is connected to the other party. If the call cannot be completed, the **Call could not be completed** message will be displayed.

Once you have picked up the call and it starts ringing the other party, the screen will get updated to following display. If the call is connected successfully, the RingCentral for Salesforce display will start showing a call timer and an area in which to take call notes. (Figures 11)

If you have set RingCentral for Salesforce to auto log calls, a call log will automatically be saved to Salesforce.com, and it will be updated whenever you type notes or change the related objects. If you have not set it to auto-create call logs, then the log will be created or updated only when you press the **Save** button.

You are free to hang up the phone through which you are speaking to the called party, and continue to edit the Comments and the Subject for the call log entry. Once the call has ended the timer will stop and the call log will move to the Last Call area where you can continue editing it.

For call actions such as transfer, hold, and mute, use the controls available on the device on which you answered the call.

Figure 11

Placing an International Call vs. a Local Call

In the event that you wish to place an international call (i.e. to a destination outside of your home country), you must ensure that the number is properly formatted.

If you wish to click-to-dial an international number, first ensure that the country code is part of the phone number, like this 📞 +33 34267 28523

Please check the locale set in your Salesforce user profile, and save local phone numbers with your records in the format without the +country code. For example, if your locale is US in Salesforce, please don't save US phone numbers with +1. The RingCentral for Salesforce app will append country code following your locale when you click to dial a local phone number; for inbound calls the app will remove the country code before searching the matching records in Salesforce for your call.

You can set your region in the app, and when you enter a local number on the dialer in the app, the app will append the country code to the local number you dialed, following your region setting in the app.

|

Incoming Calls

When an incoming call is received, you are notified about the incoming call on your RingCentral for Salesforce. The background color will change according to different status. For example, the ringing call will be shown in green background color.

In addition to the app notification, other phones will ring, depending on the configuration of your RingCentral phone system.

Once you pick up the call on your device/desk phone, the call timer will start and the layout will change to give you the option to log the call. If the call goes directly to voicemail without ringing any of your RingCentral phones, then there will not be any notification to your RingCentral for Salesforce.

You have the choice of logging incoming calls, independent of the actions you take on your phone (e.g., accept the call, reject the call, put the caller on hold; hang up the call). Such actions you take will not impact the call logging experience in Salesforce.

With RingCentral for Salesforce 6.0, you now have call control capabilities to End, Mute, Transfer, and Hold calls at the bottom of call log screen. To save the log as related activity, select the appropriate Salesforce entity and after fulfilling the required call log information, click the **Save** button.
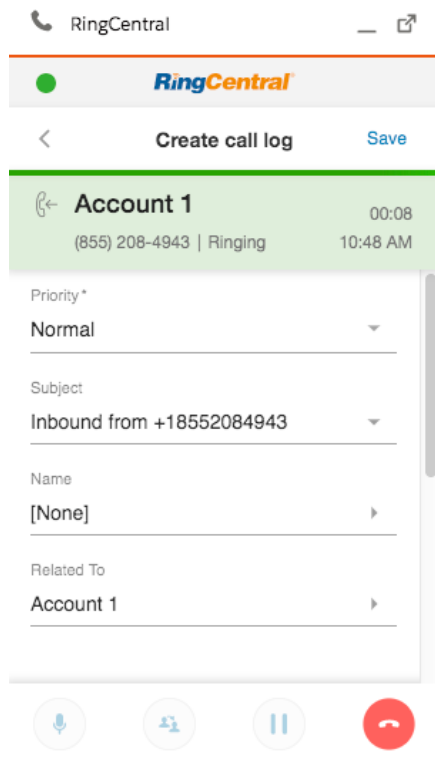

Figure 12

13

Related Search

Whenever there is an incoming call, the application searches Salesforce for matching records. Depending on the settings of your SoftPhone Layout in Salesforce.com, you will see the results in either the same window or a new window.

If there is only one matching record, the detail page of that record will be displayed. If there are multiple records, usually you should see the search page listing all of the matching records. These settings can be changed or updated only by your Salesforce Administrator.

You can also find the matching record(s) in the **Related To/Name** dropdown in the app window.
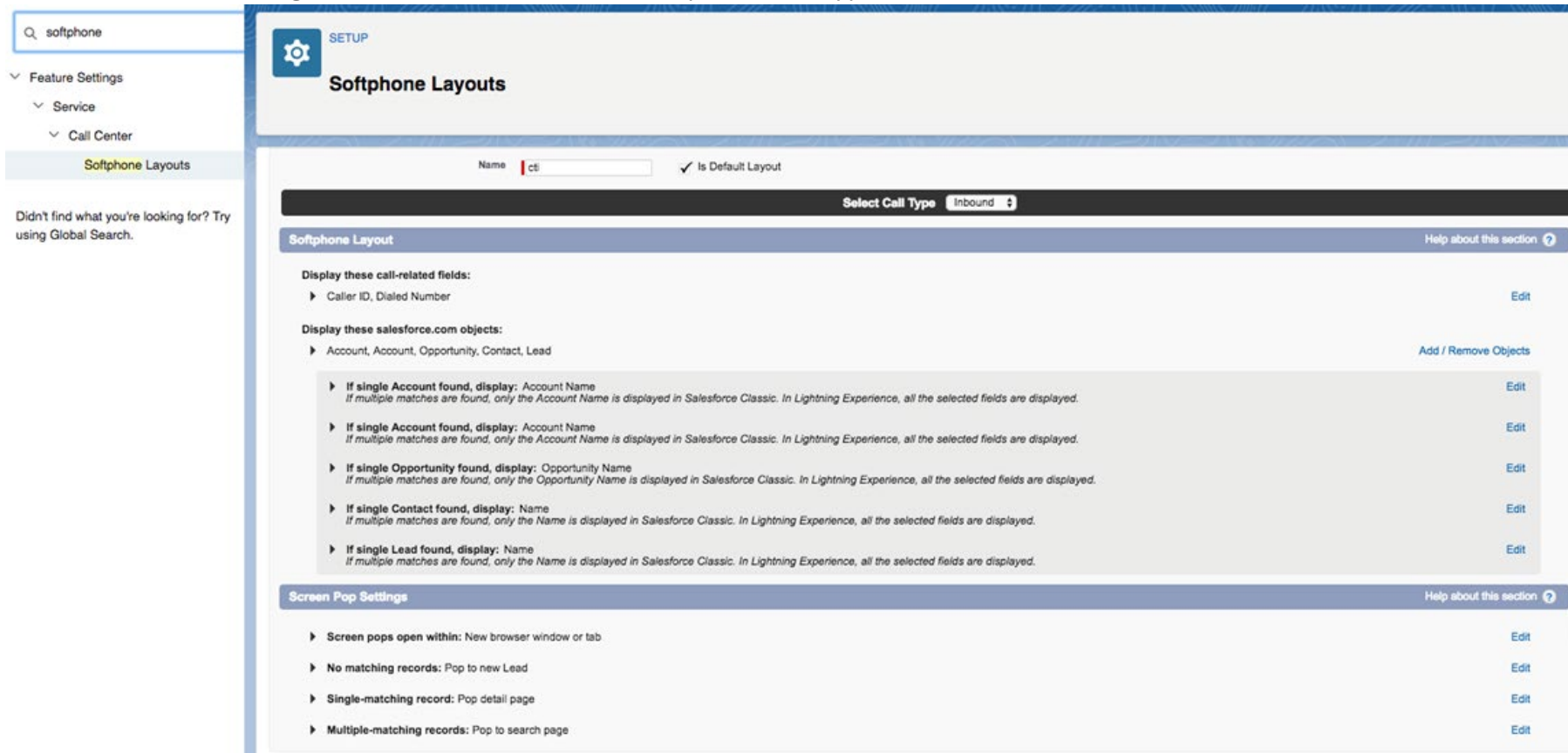
Figure 13

Logging Calls

When you want to log a call, there are two ways for user to log the call. The first is when the call is connecting and the call log screen is shown up. The user can select priority, subject, name, related to, and due date in the call log screen as below. The second is via offline logging.
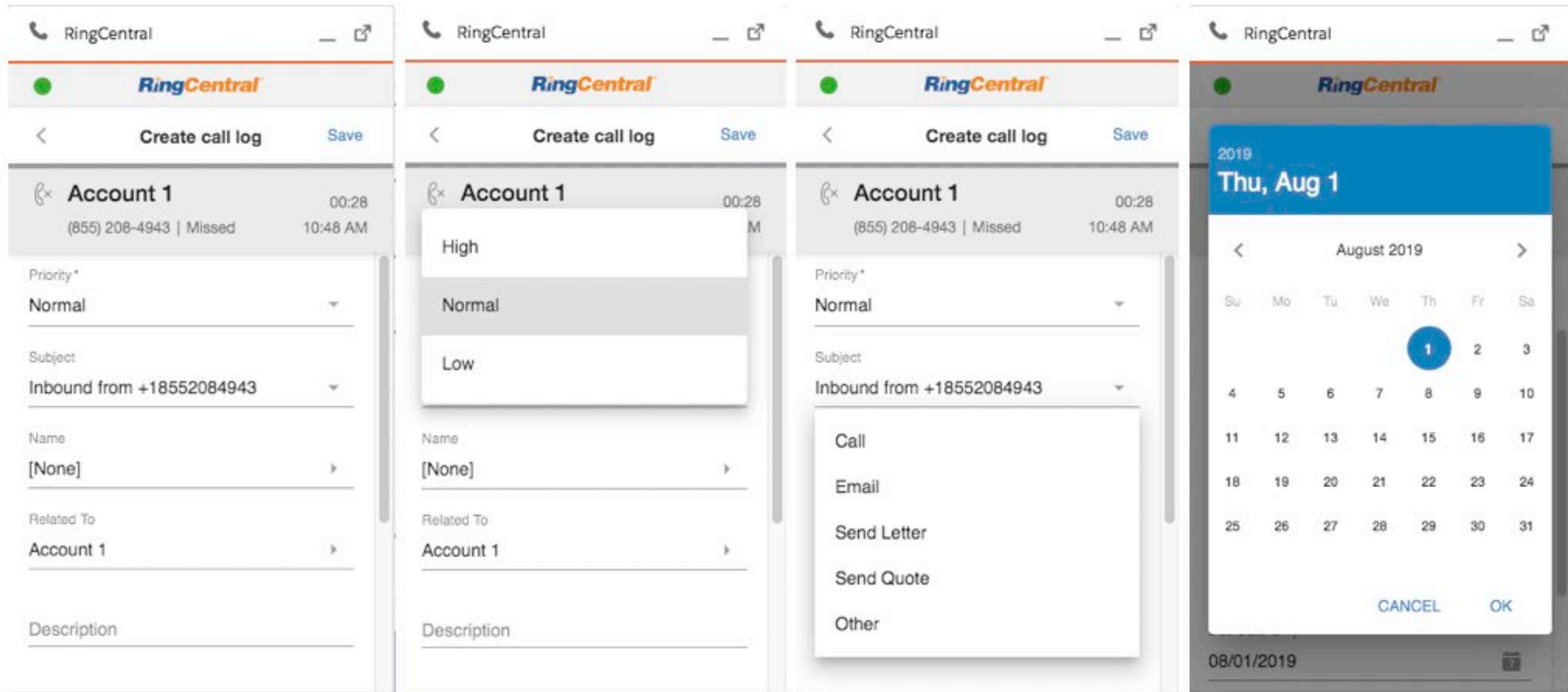
Figure 14

Offline Logging and Editing

If the call is disconnected, the user still can go to call history and click record with red dot icon to log the note for call. In terms of already logged call, the user still can reopen the note for editing. They can click the call record with green dot icon for updating.

Figure 15

RingCentral®
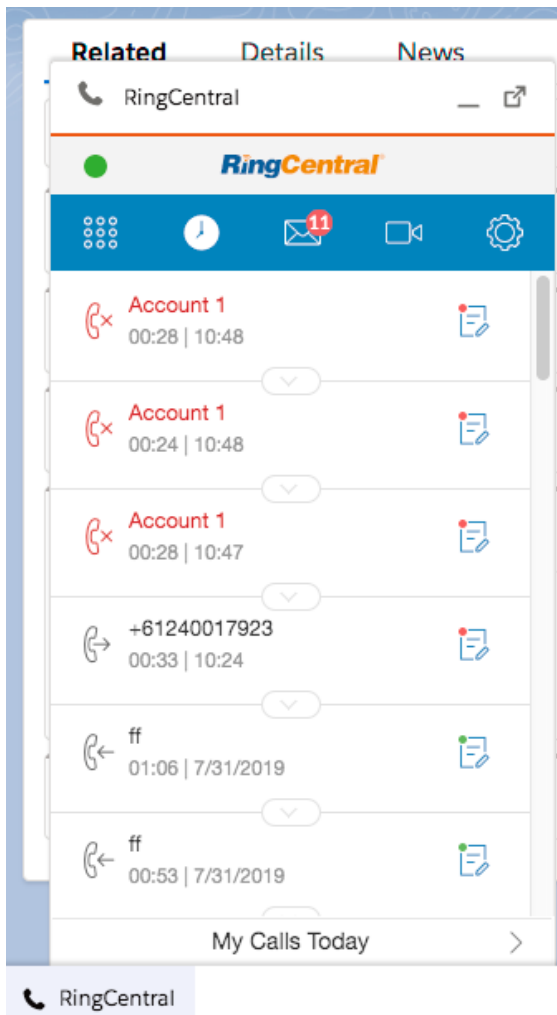
Selecting Matched Contact

If there is a contact matched for the call no matter single match or multiple match, the users can click "Name" or "Related To" field to decide what is the name they want to log for this call.

Figure 16

When in submenu call log screen (Figure17) in choosing matched name, there are three functions supported here:
1. Search: The user can use search to quickly filter out the matched names they want for selecting.
2. Navigate to: If there is no sufficient matched name, the user can still go to specific name's profile via Salesforce console and the name will be auto populated to the Other section in this screen.
3. Create new account/opportunity: If there are no match for existing Salesforce data, the user can just create a new one.
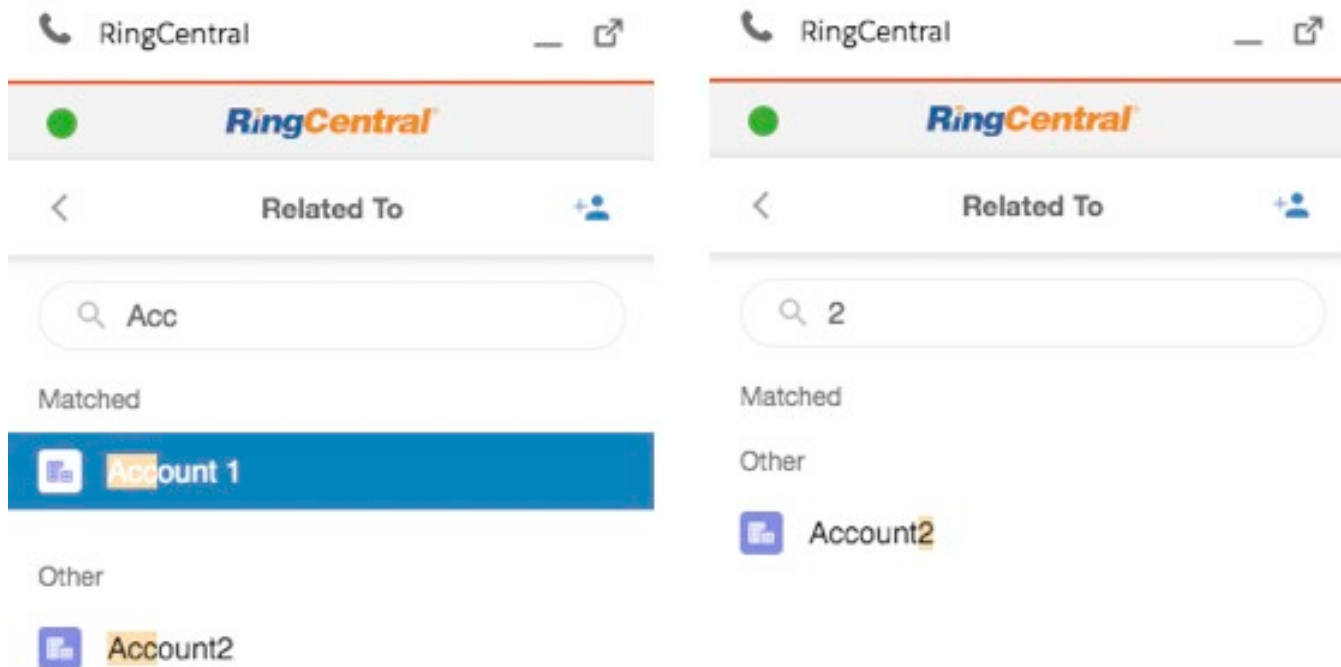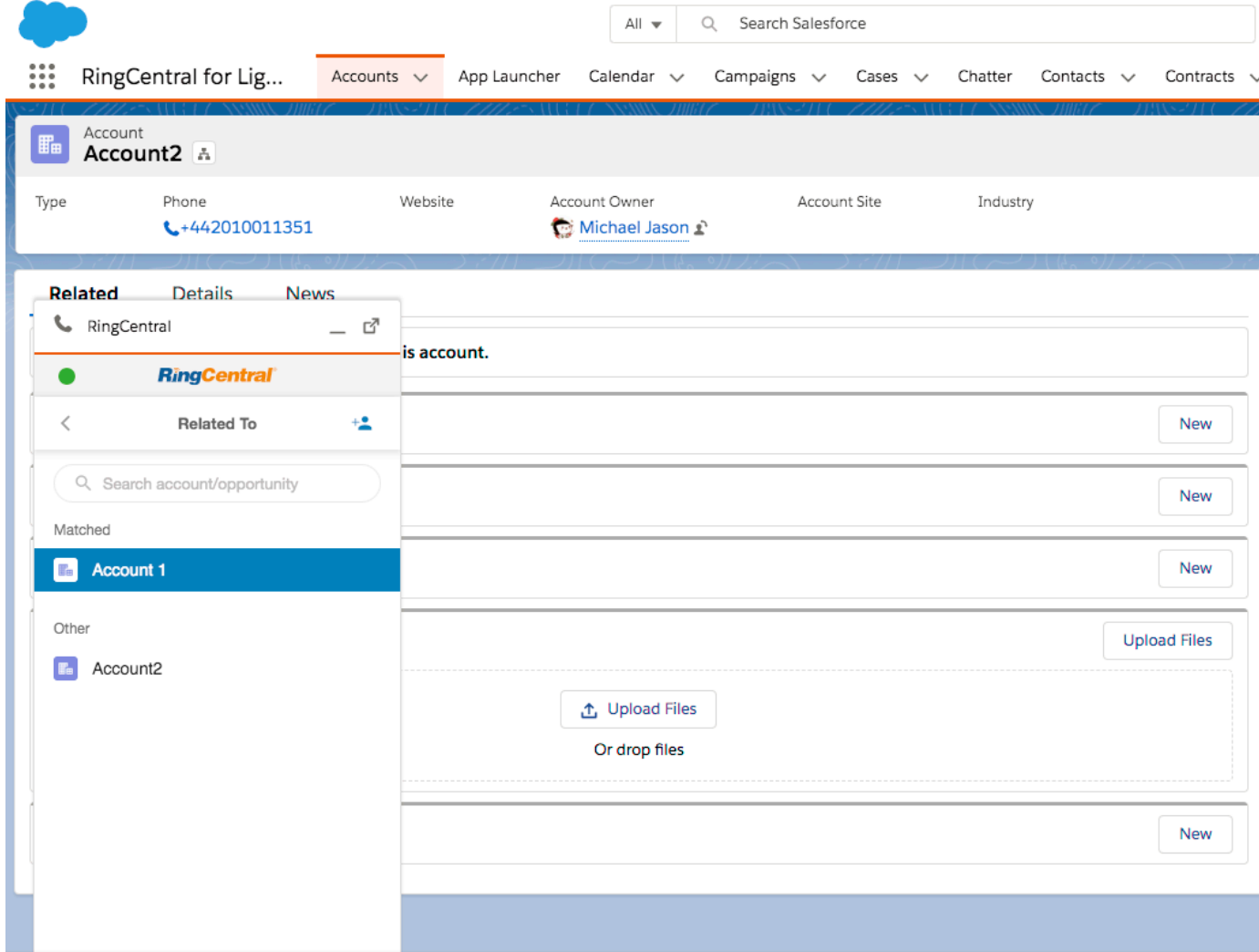

Figure 17

When user opens Salesforce Account2 profile, the Account2 will be auto populated to **Other** section.

Figure 18

When user clicks 'Create account' or 'Create opportunity,' the user can create it by Salesforce pop-up screens as below.
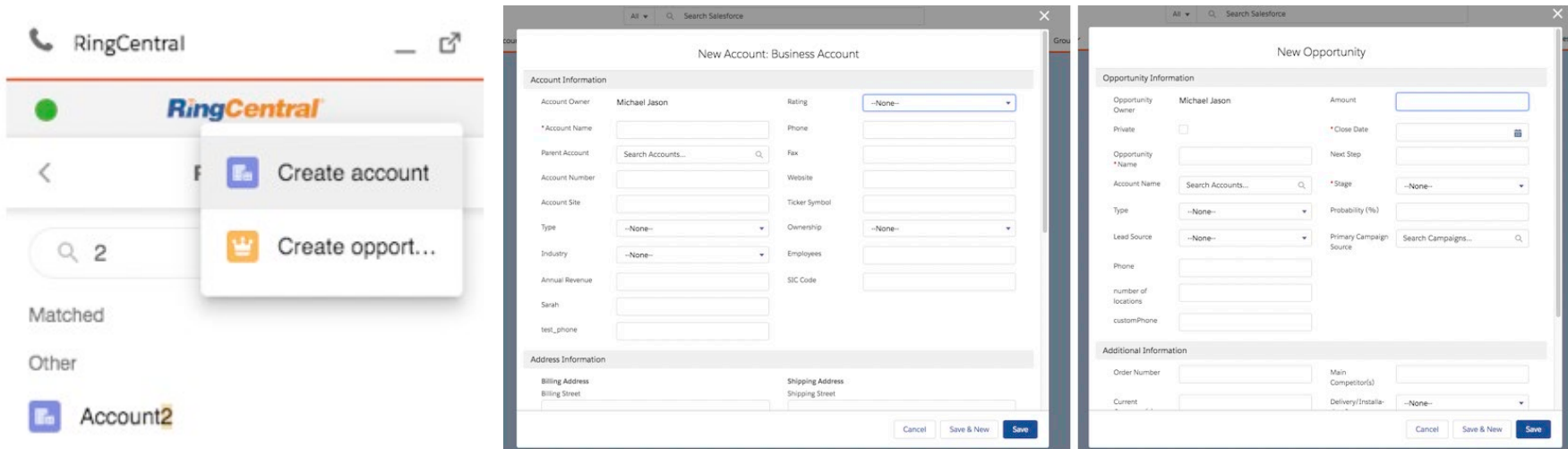

Figure 19

Organizing Meetings from RingCentral Salesforce Integration

Conducting Meetings to showcase the product or providing a personal touch to the communication with a prospect or customer is an essential part of creating a successful sales team.

RingCentral extends the capability to seamlessly schedule or start an instant meeting from right within Salesforce. Reps can schedule or start an instant meeting in the following ways

1. From the RingCentral CTI App in Salesforce

End users can schedule a RingCentral Meeting or RingCentral Video Meeting from the RingCentral App in Salesforce. Also an Event is created in Sf for the scheduled meeting.
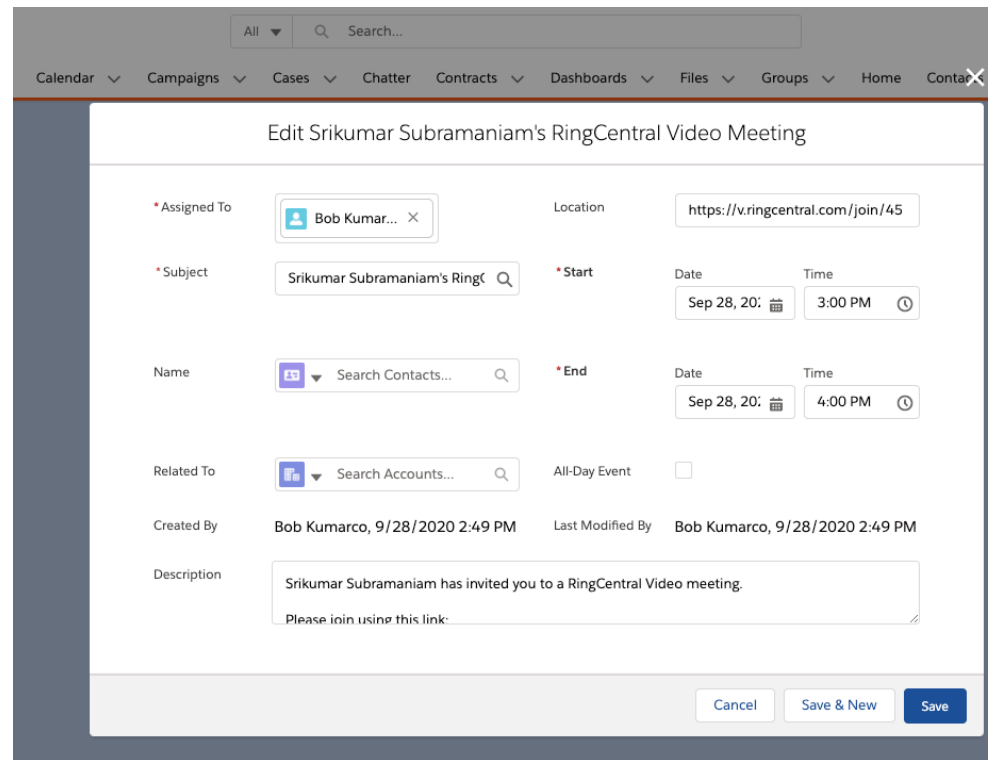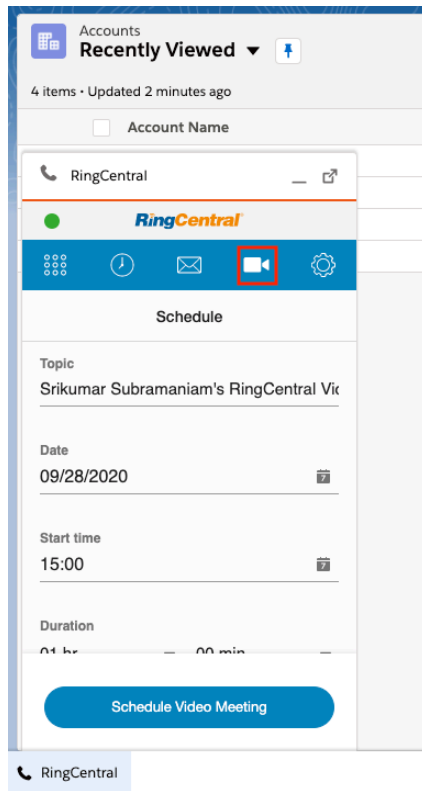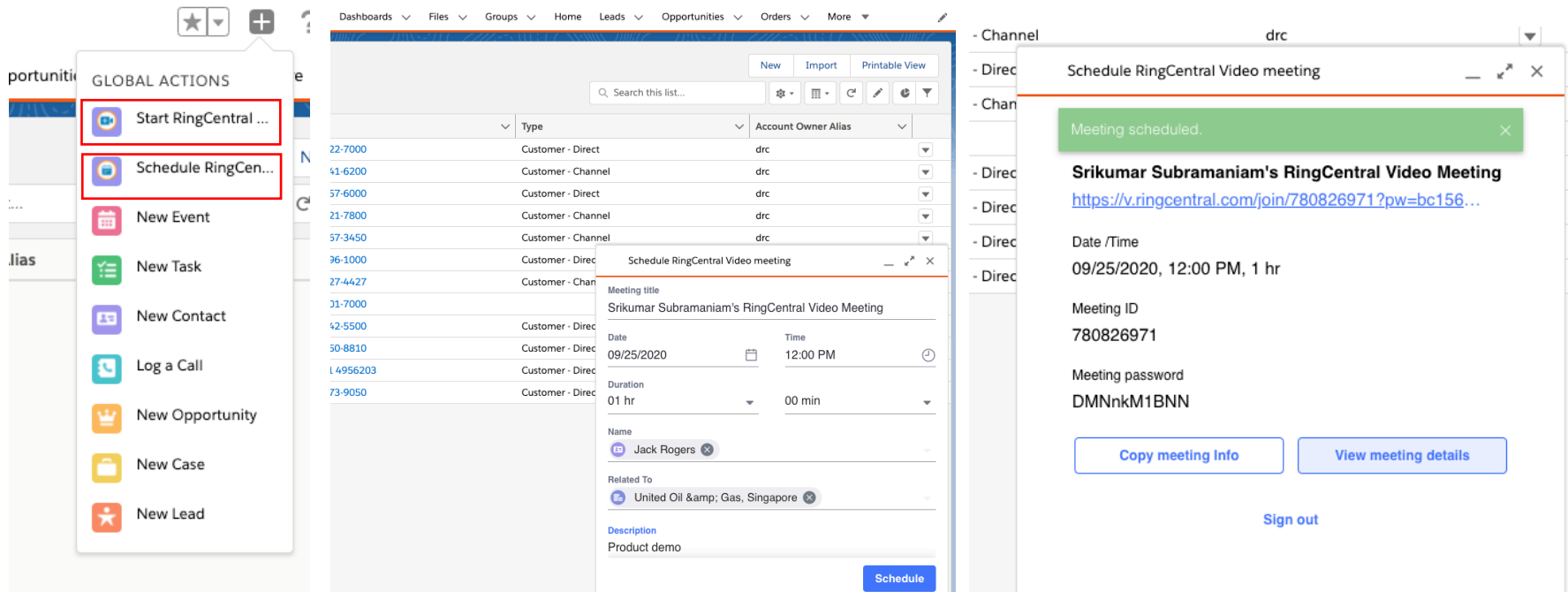
RingCentral®

2. From Global Actions in Salesforce

Users can easily schedule a RingCentral Video meeting from Salesforce Global Actions. RingCentral provides 2 actions in Salesforce Global Actions
1. To schedule a RingCentral Video Meeting
2. To Start an instant RingCentral Video Meeting

Once user clicks on any of the above actions, they will be prompted to sign into their RingCentral account and then either Schedule or start an instant RingCentral Video Meeting

Note: Only RingCentral Video is supported from Salesforce Global actions and not RingCentral Meetings. To schedule meetings using RingCentral Meetings use the RingCentral App as shown in section 1 above.

Call Recording

If you record your call and logged that call in Salesforce.com, you can find the call recording in the **Task Detail** page within a field **Call Recording**.

Click the link and you will be prompted to login with your RingCentral credentials.

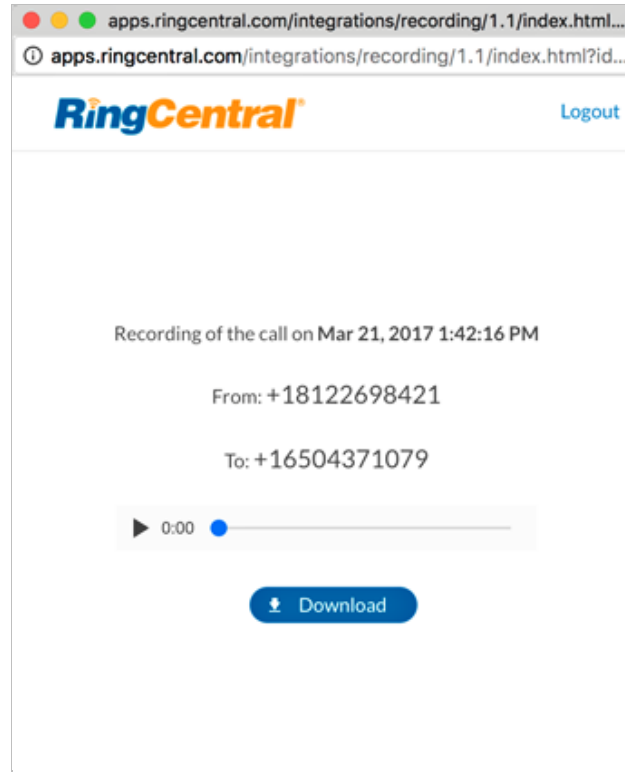You can select to play or download the call recording.

Figure 20

Figure 21

Note that you can access only the call recordings that you record. Only the system administrator of your RingCentral account can access all the call recordings in the organization.

Compose Text

Click **Compose Text** icon in the navigation bar. Select which of your numbers you wish to send the text to. Enter the **To** phone number and compose the text message. Then click **Send** button. The sent message will be displayed in the conversation area.
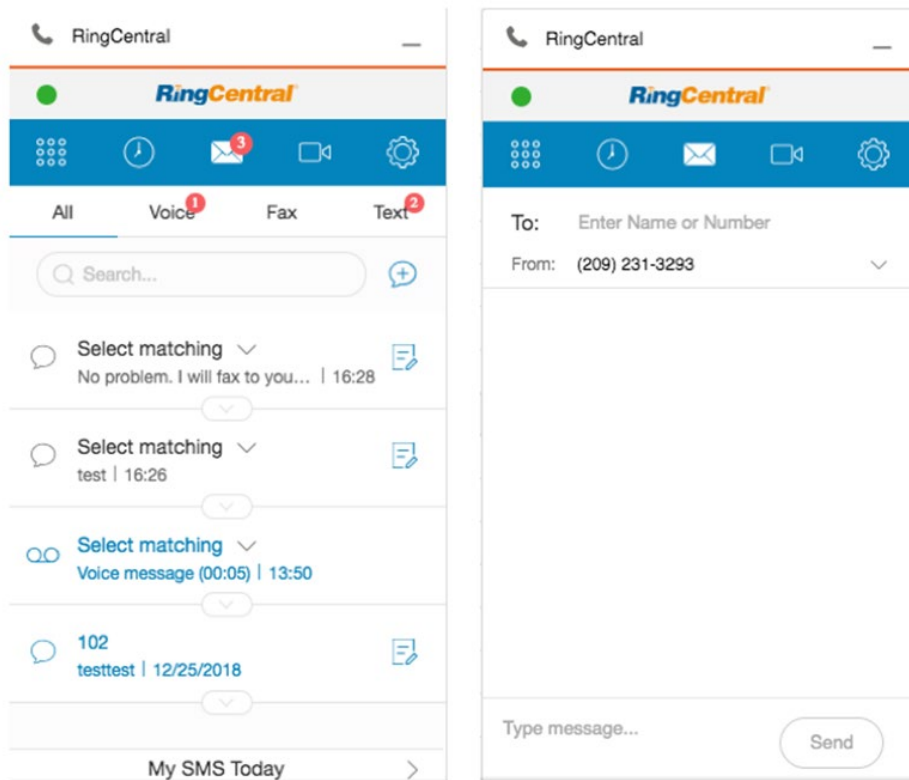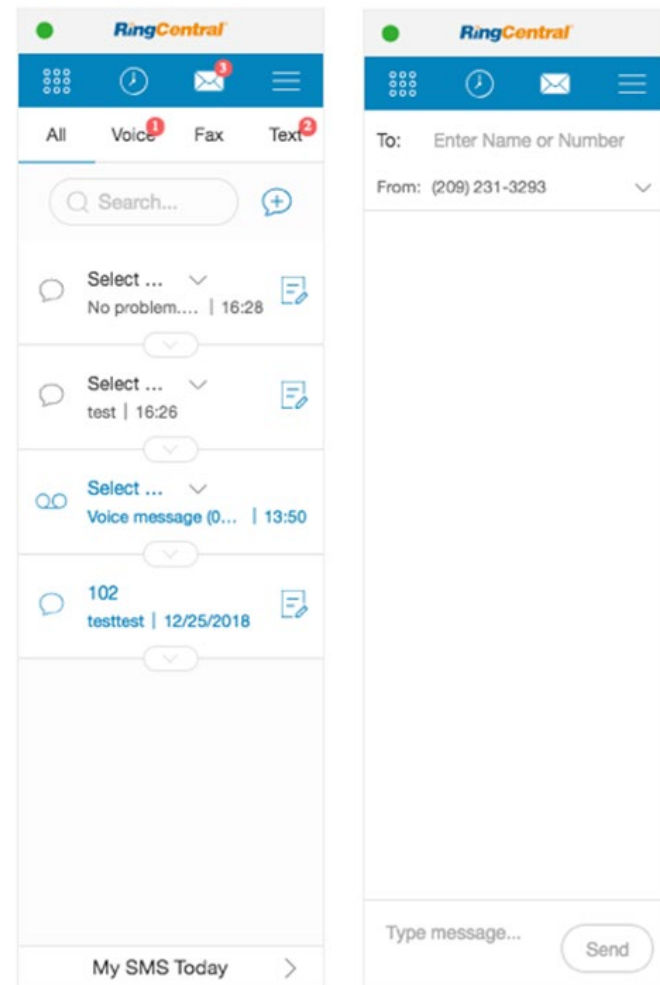

Figure 22—Lightning

Figure 23—Classic

Messages

Message history of past 7 days can be found in the **Messages** tab.

If it's an unknown number, you could create a Salesforce object for it, or link it to any existing
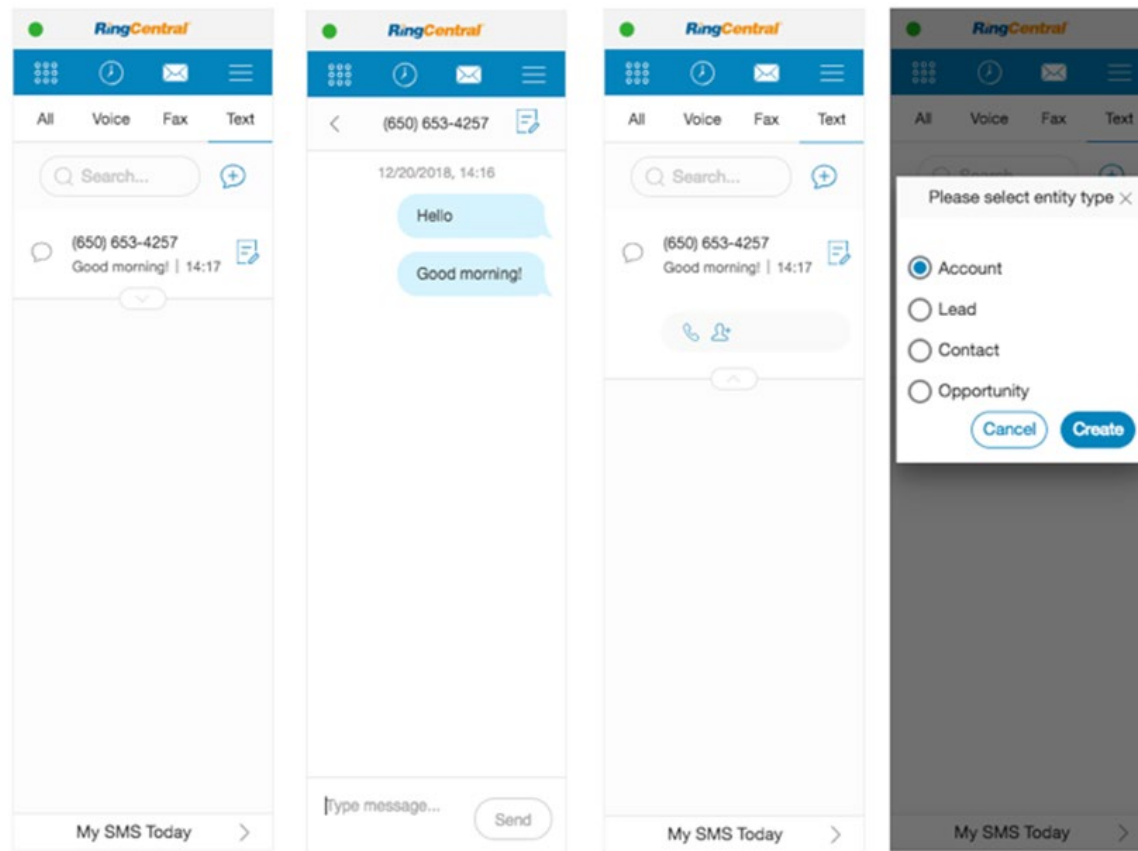

Figure 24

To save messages as related activities, if you have **Auto-create SMS Log** turned on, the messages will be logged the moment it's successfully sent/received. Once you log in the RingCentral for Salesforce app, all the history messages will be logged as well. In case you have the **Auto-create SMS Log** turned off, if you wish to create log for a message conversation, go the message conversation details page and click the save icon.

Auto Log

There are three types of auto-log function to help users better track calls and SMS. They are 'Auto log calls', 'Auto log notes', and 'Auto log SMS'

Auto log calls

When turn on auto log calls, the incoming calls will be logged automatically. This covers basic call fields, such as Name, Related To, Subject, Description, etc.

Auto log notes

When turn on auto log calls, the incoming calls and its customized fields data will be logged automatically. The customized fields can be set by admin account via **AdminUI**. In addition to basic Call fields, user can define columns that match field type in Salesforce Task as additional fields to log here. The field type includes Lookup, Date, Picklist, Text, and Text Area. All fields in Task entity matches selected field type will be logged as well.

Auto log SMS

When turn on auto log calls, the incoming SMS will be logged automatically.

Trigger timing

There are two types of trigger timing: '**on call ringing**' and '**on call answered**' which can be set by admin account via **AdminUI**.
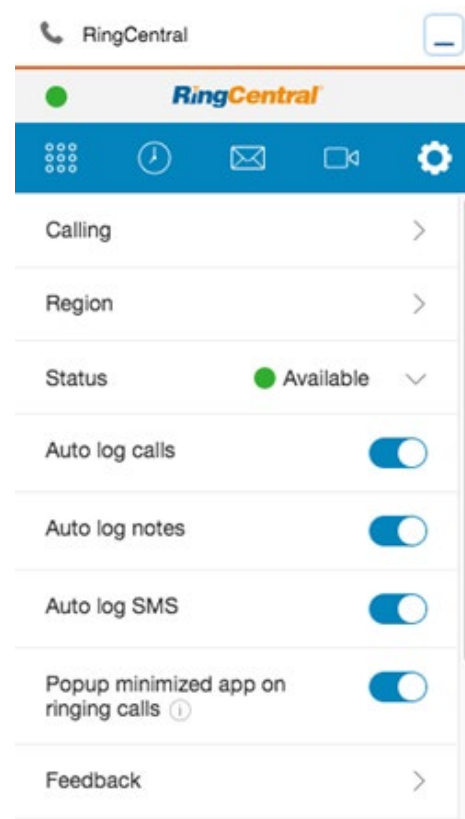
Figure 25

26

![RingCentral logo]

Activity Report

As you log calls and messages, you will see a link **My Calls** at the bottom of the **Dialer** tab, and a link **My SMS** at the bottom of the **Compose Text** and **Messages** tabs. Clicking the links will take you to the Lightning **REPORT** page.

All the fields in report can be self-defined in Salesforce.com **Reports** tab. You can add/drop fields and change the display order by drag and drop the fields from left side to right side.

Figure 26

Figure 27

Figure 28

Analytics Report

Entry for Analytics Report

Go to **setting** and click the first link. If you have not set up the role hierarchy, it only shows your individual data for logging account. But it shows the data of all team members under you according to the hierarchy set up in Salesforce Roles.

Figure 29

30
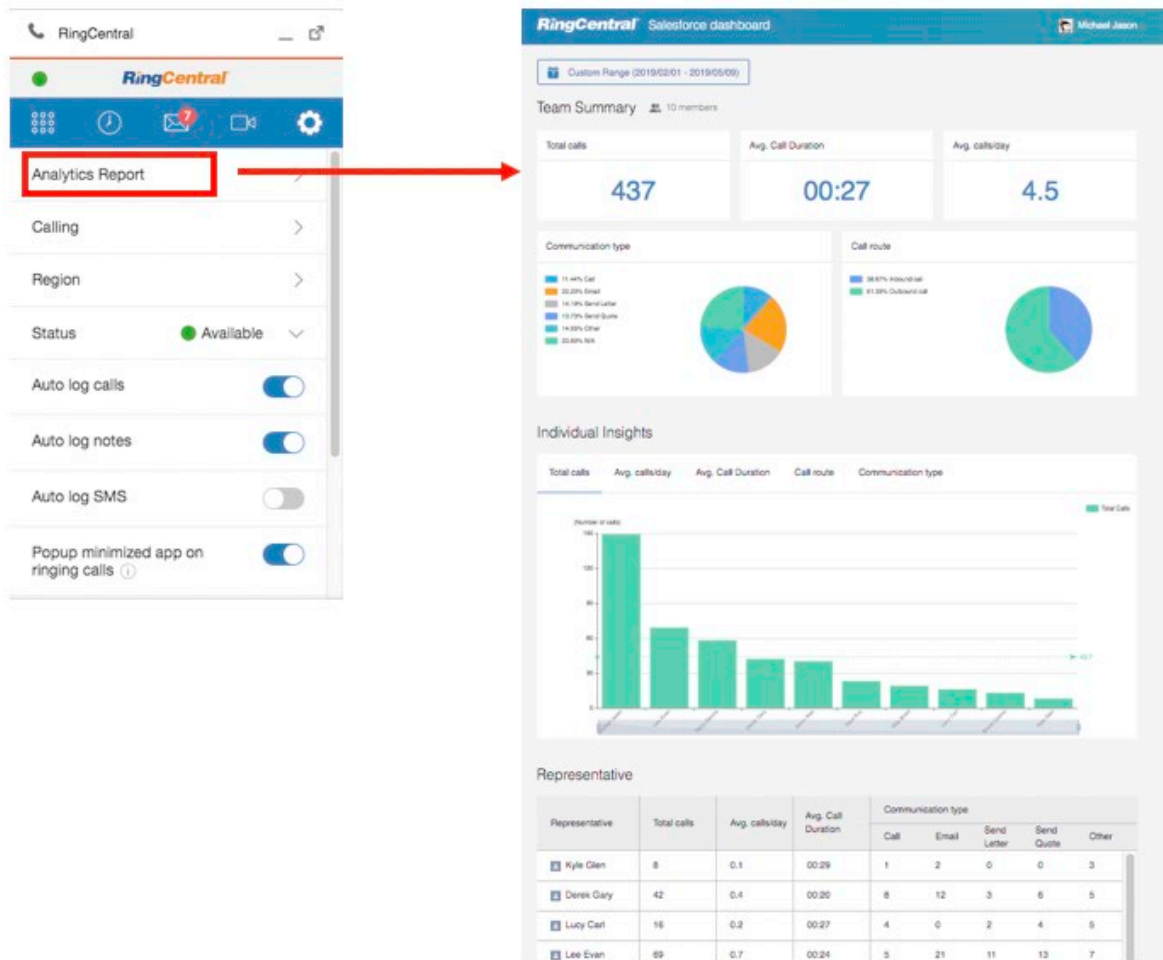
The Overview of the Analytics Report

There are four parts to compose the Analytics Report. From the top to bottom they are: Time selection, Overall KPIs, Bar-chart, and Table. In overall, there are two types of view in report: **Team view** and **Individual view**. You can see all your members under your role in Salesforce roles hierarchy. When you click one name from User name field at the bottom table, it redirects to an individual page view.

There is no difference between **Team view** page and **Individual view** page, except number of members shown on the page. If you don't setup the roles hierarchy, therefore, it only shows individual view by default.

1) Time selection

2) Overall KPIs: multiple data metrics to represent whole the team

3) Bar-chart: comparison across different members by selected data category

4) Table: overall raw data table for whole the team.

Figure 30

31
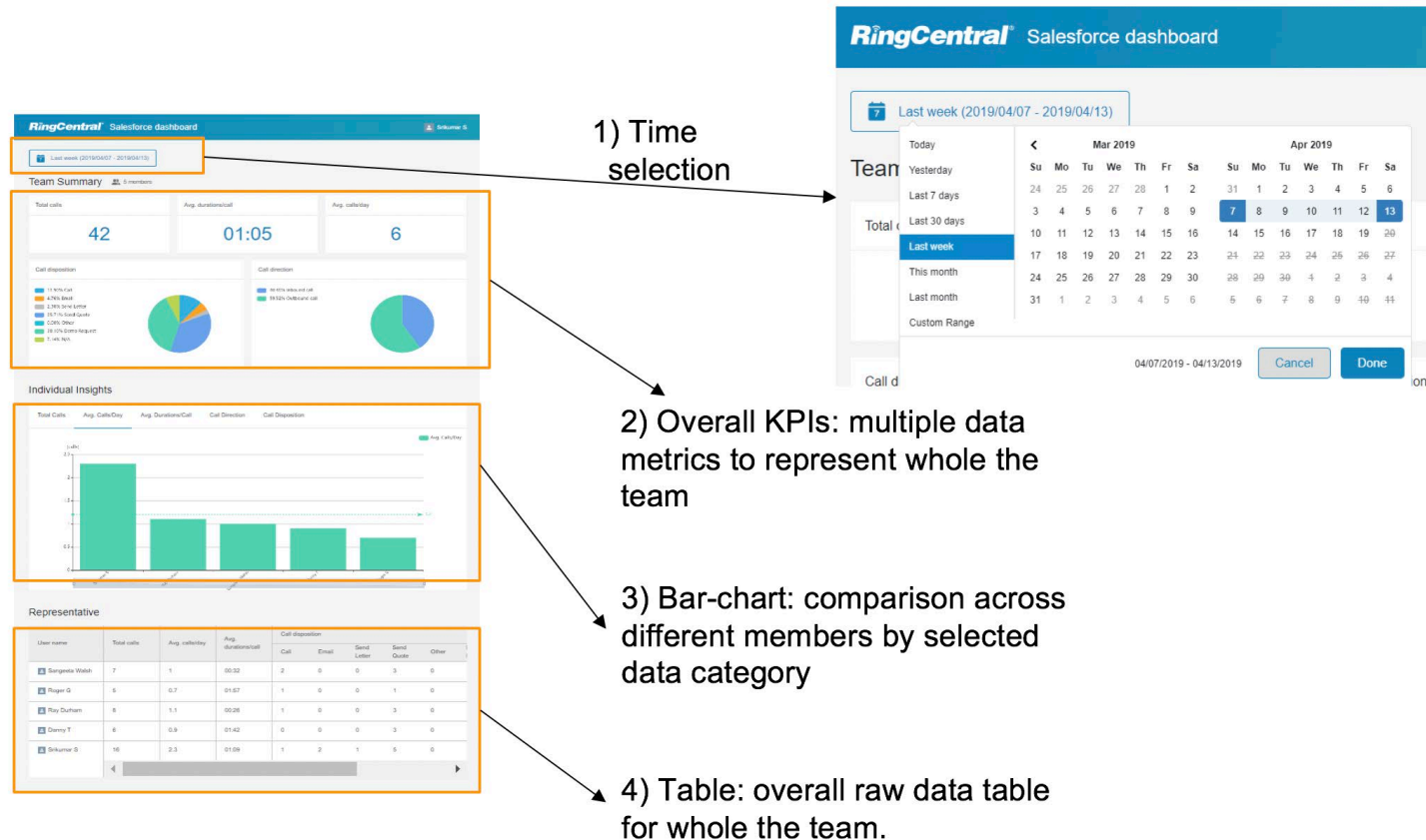
Time Selection

At the top is a Time selection for user to quickly pickup time template, such as "Last 30 days" and "Last month" and so on. The user is also able to define their own time period by choosing the start date and end date from calendar directly.
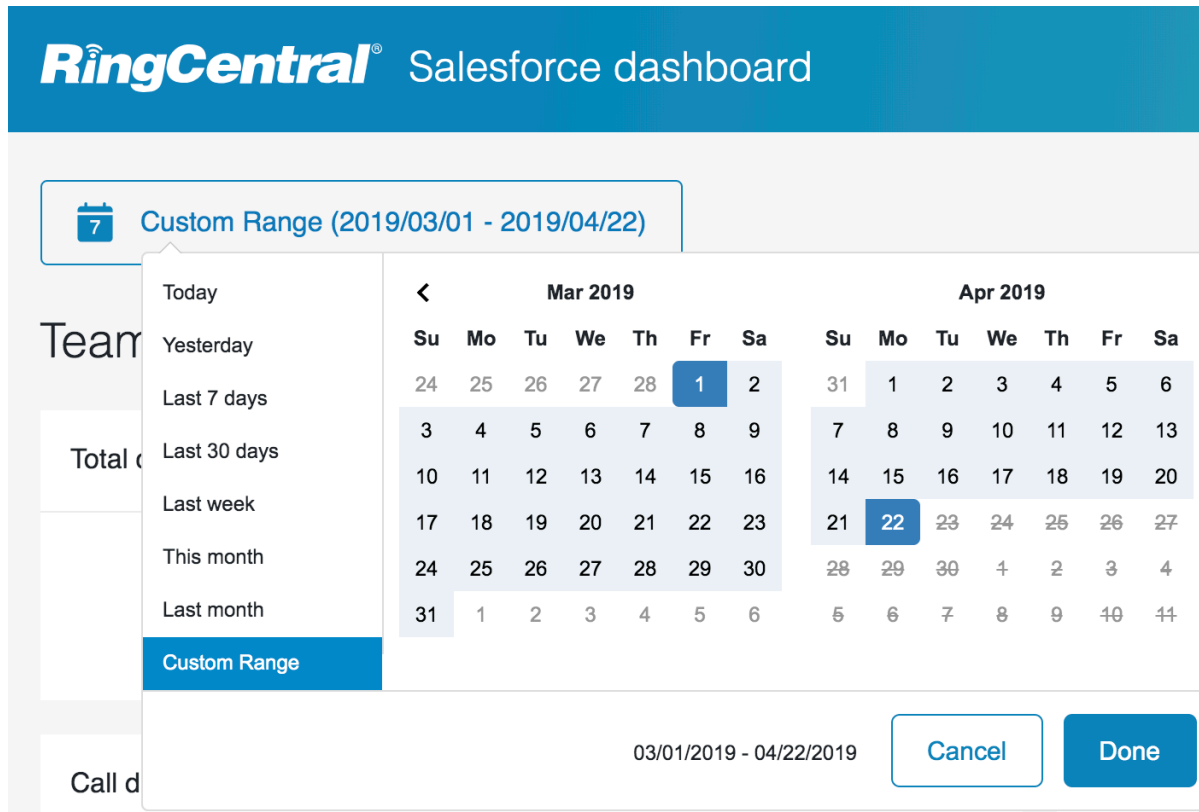
Figure 31

The Overall KPIs

The first session of the report is the team overall KPIs. From here, the user can easily manage how the team behave from call perspective. The number here can be also the reference when comparing to individual rep's number.

Team lead + all reps

This release covers 5 metrics:
- Total calls
- Average duration/call
- Average calls/day
- Call disposition
- Call direction
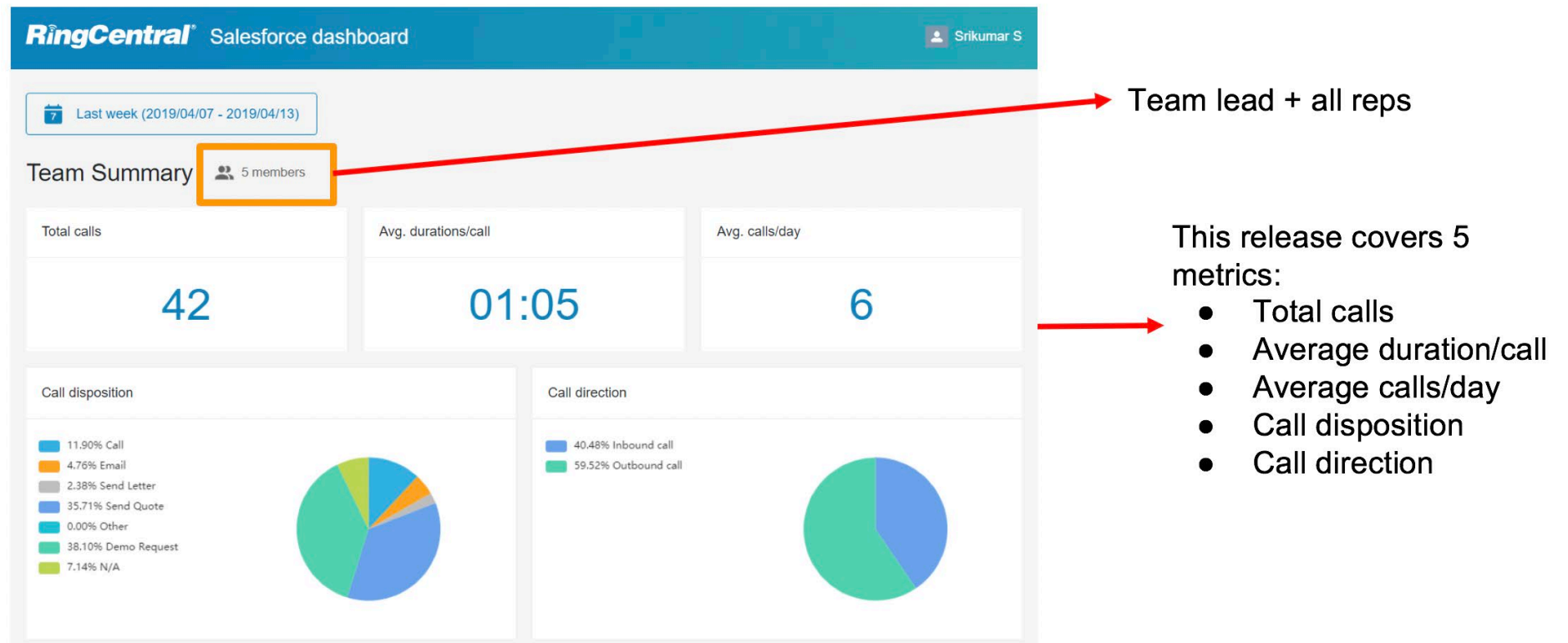
Figure 32

When mouse hovers over the pie chart, it will show the number of calls logged for that specific call disposition.
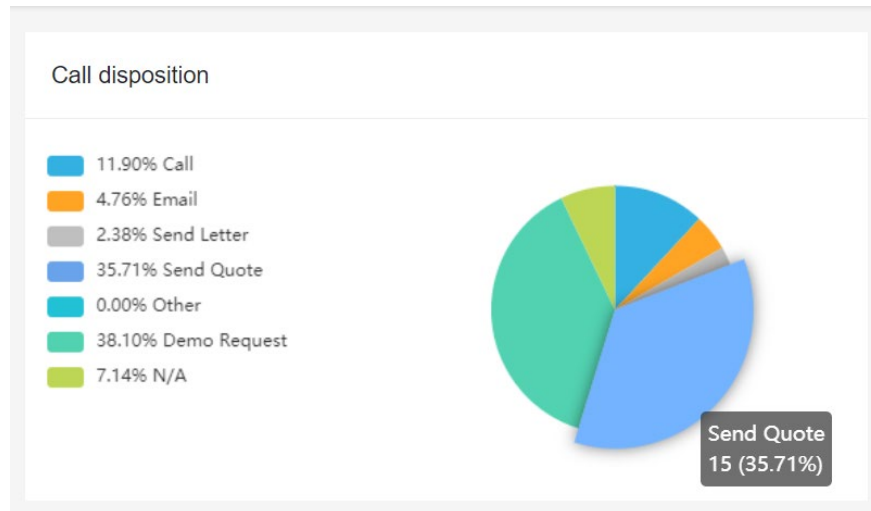
Figure 33

The Bar Chart

At the middle of report is the Bar-chart to show the comparison among sales rep team reps. You can click what data metrics you want to see at top. Each individual rep data will show as a bar and there is also a team average line in bar chart.

Bar chart comparison for all team members
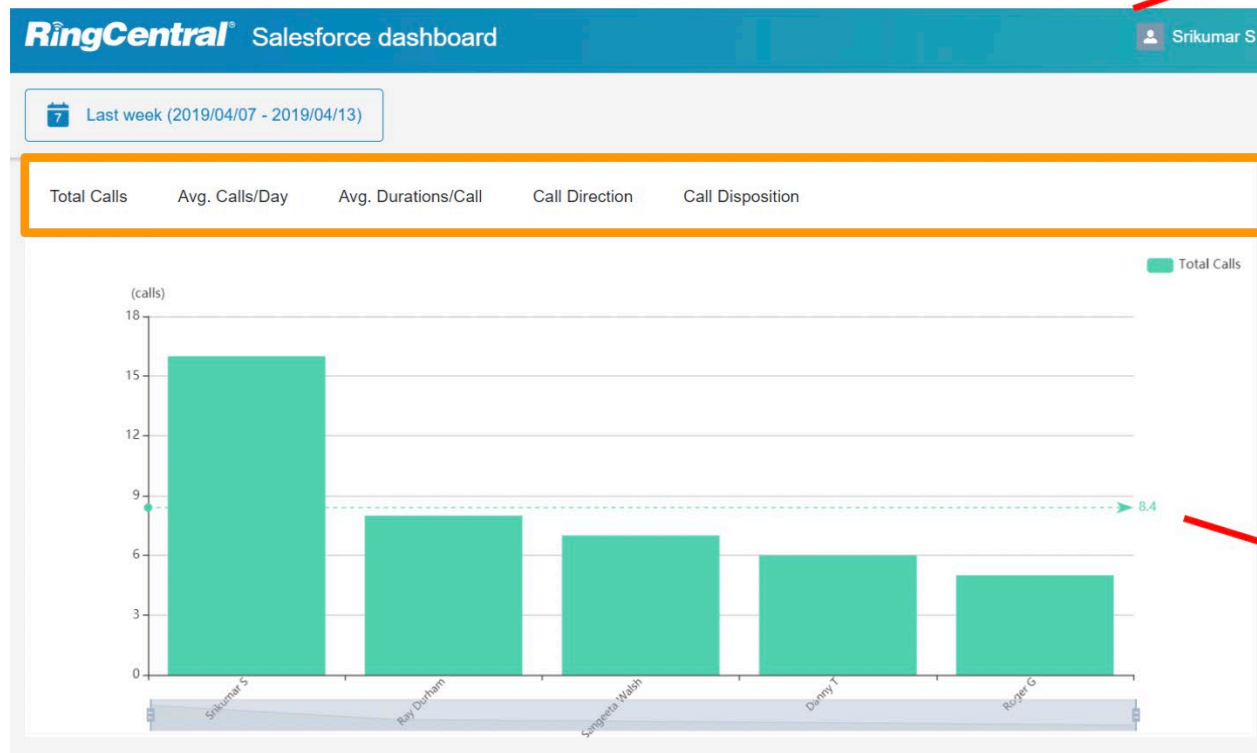
Choose metrics

Average number of calls

Figure 34

If there are multiple subtypes within the data metric, it will show in different colors within a bar

Figure 35

Zoom in or out to view individual or all team performance.
Move the slider to view an individual rep's data, multiple reps or the entire team's performance.

Figure 36

RingCentral®
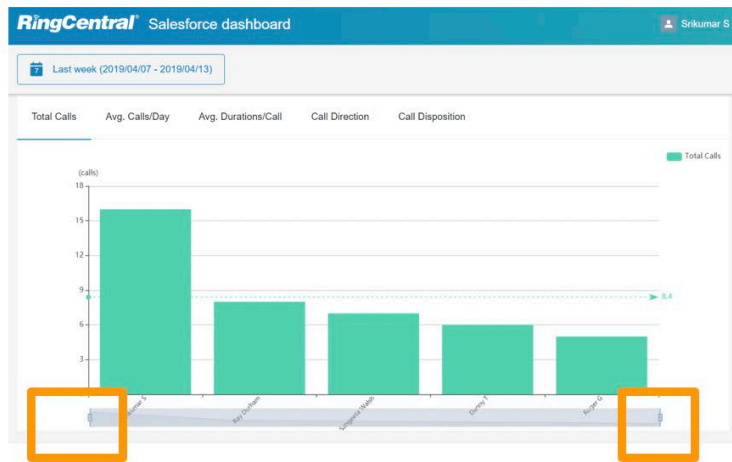
The Table

At the bottom of report, it shows a table to display all metrics by all sales reps. Each individual name is clickable to link to individual view page which can see specific one-person data metrics only.
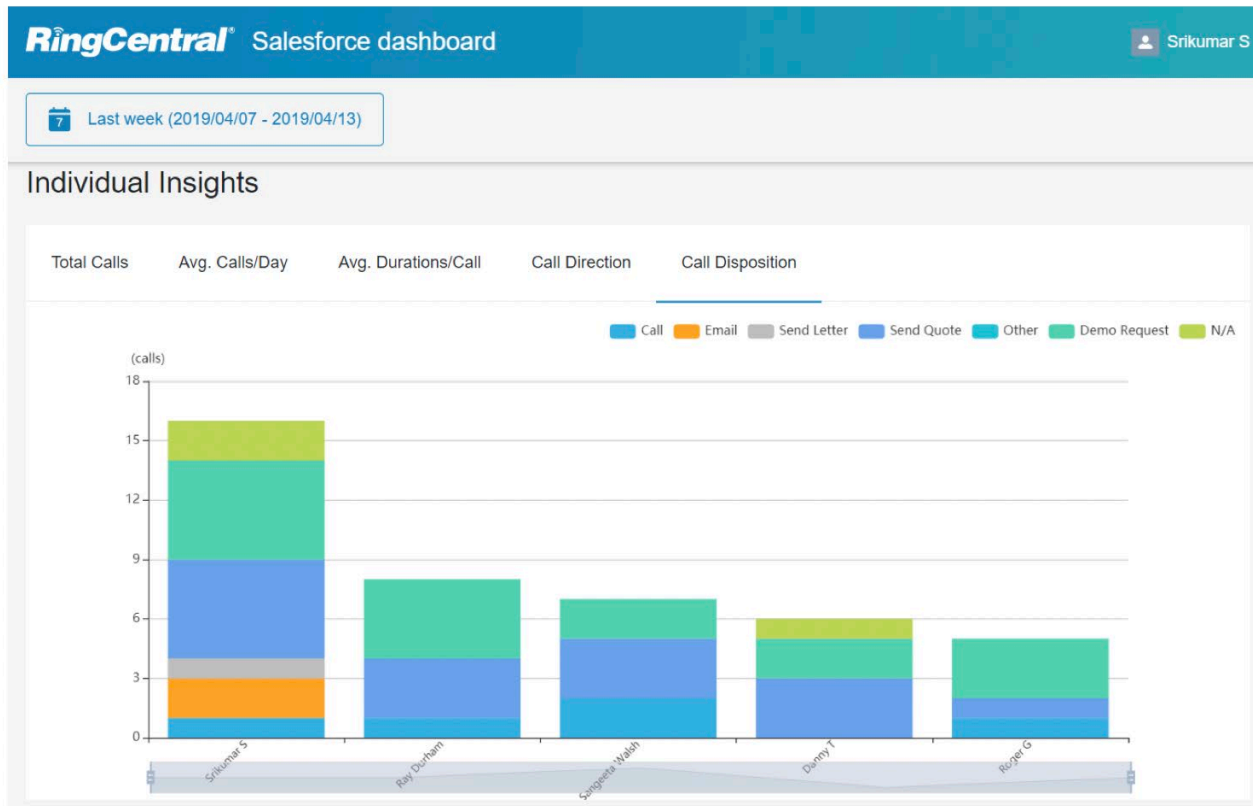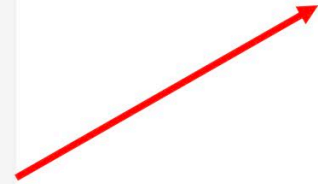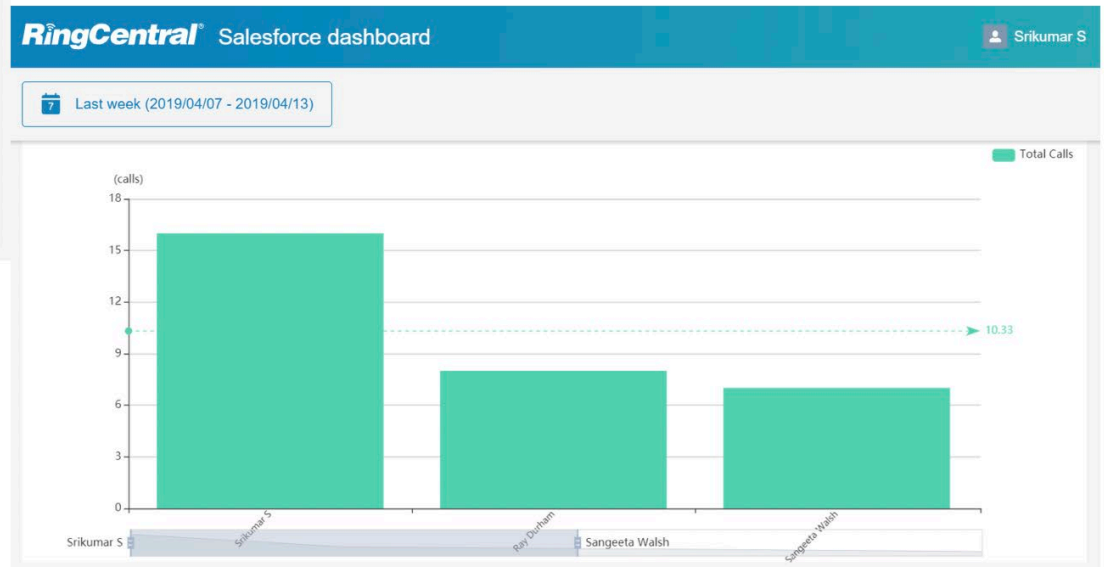
📅 7 Last week (2019/04/07 - 2019/04/13)

Representative

User name	Total calls	Avg. calls/day	Avg. durations/call	Call disposition							Call direction	
				Call	Email	Send Letter	Send Quote	Other	Demo Request	N/A	Inbound	Outbound
👤 Sangeeta Walsh	7	1	00:32	2	0	0	3	0	2	0	3	4
👤 Roger G	5	0.7	01:57	1	0	0	1	0	3	0	3	2
👤 Ray Durham	8	1.1	00:26	1	0	0	3	0	4	0	4	4
👤 Danny T	6	0.9	01:42	0	0	0	3	0	2	1	1	5
👤 Srikumar S	16	2.3	01:09	1	2	1	5	0	5	2	6	10

Team lead can click on the rep name to go into view the details of that rep.

Figure 37

Cloud Phone Reports (*beta*)

With Cloud Phone Reports, you will be able to leverage RingCentral Analytics data such as overall team performance and view it as a native Salesforce report. These reports provide you with the flexibility to edit and customize the report within the Salesforce interface, which the current visualforce based report does not support.

Prerequisite: Users who have Reports/Dashboard features permission would be able to access and edit the reports and also make copies for the future.

To access the Cloud Phone Reports, navigate to the **App Launcher** and click on **RingCentral for Lightning App**. Next, click the downward arrow next to the **Dashboards** menu and click **Cloud Phone Dashboard for Lightning or Classic.** If you do not find a Dashboards menu, then click on the downward arrow on
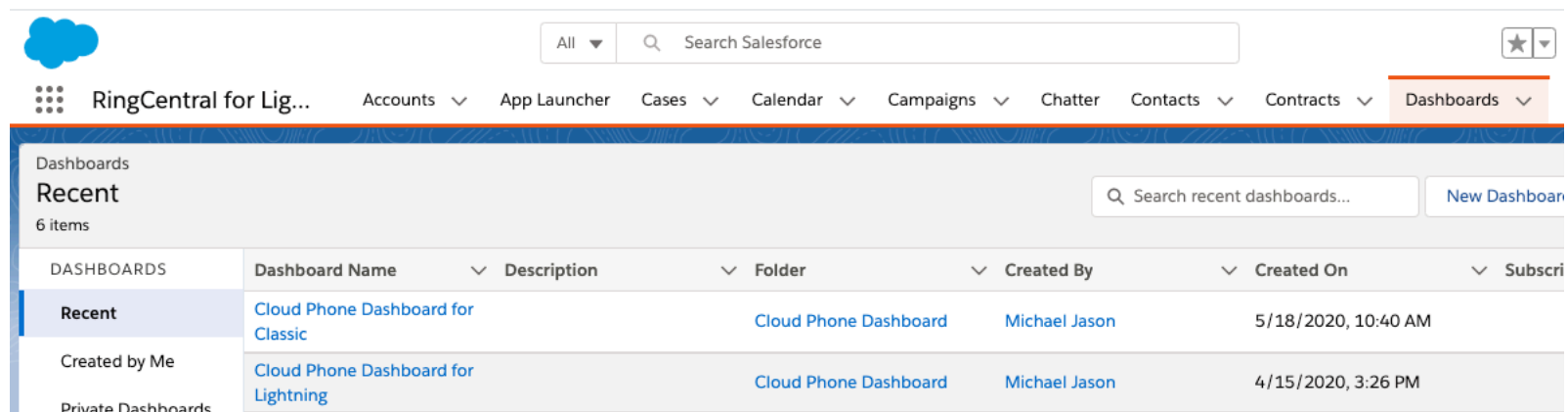

Figure 38

The reports in the Dashboard can be accessed from the Reports menu within Salesforce and by clicking on the "Cloud Phone Report" to create customized reports which can be then included in the Dashboard.
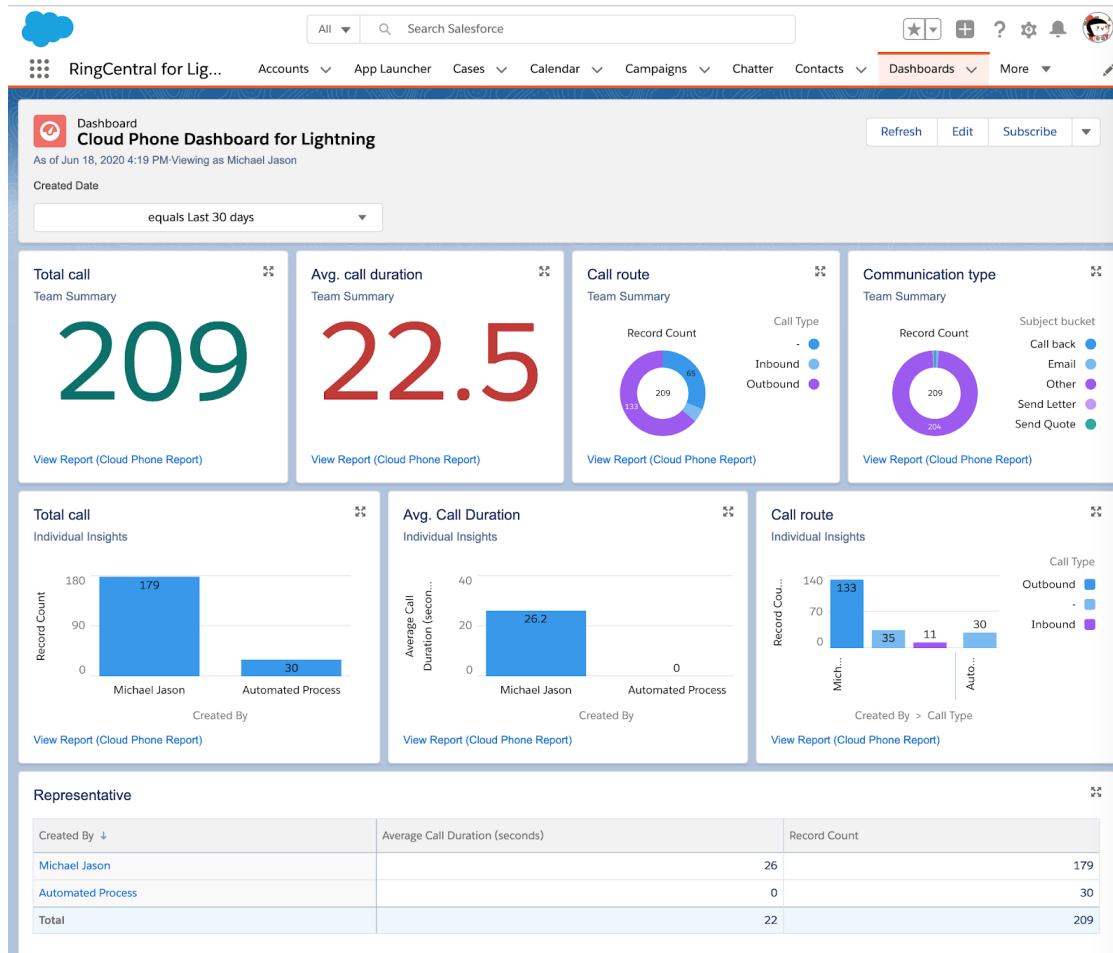
Figure 39

Figure 40

Limitations

Compared to the existing Visualforce based RingCentral for Salesforce Analytics Reports, the Cloud Phone Reports has certain limitations and features yet to be supported, such as

- Average calls details are unavailable
- Access to report page for a specific user on clicking on the reps name is unavailable

Call and SMS with RingCentral from Salesforce Mobile App

Please make sure you have installed the RingCentral mobile app to use these functions.

Log in to Salesforce Mobile App. Go to check the details of an account, a contact or a lead with phone numbers(s). On the bottom menu you can find the **Call with RingCentral** and **SMS with RingCentral** options.
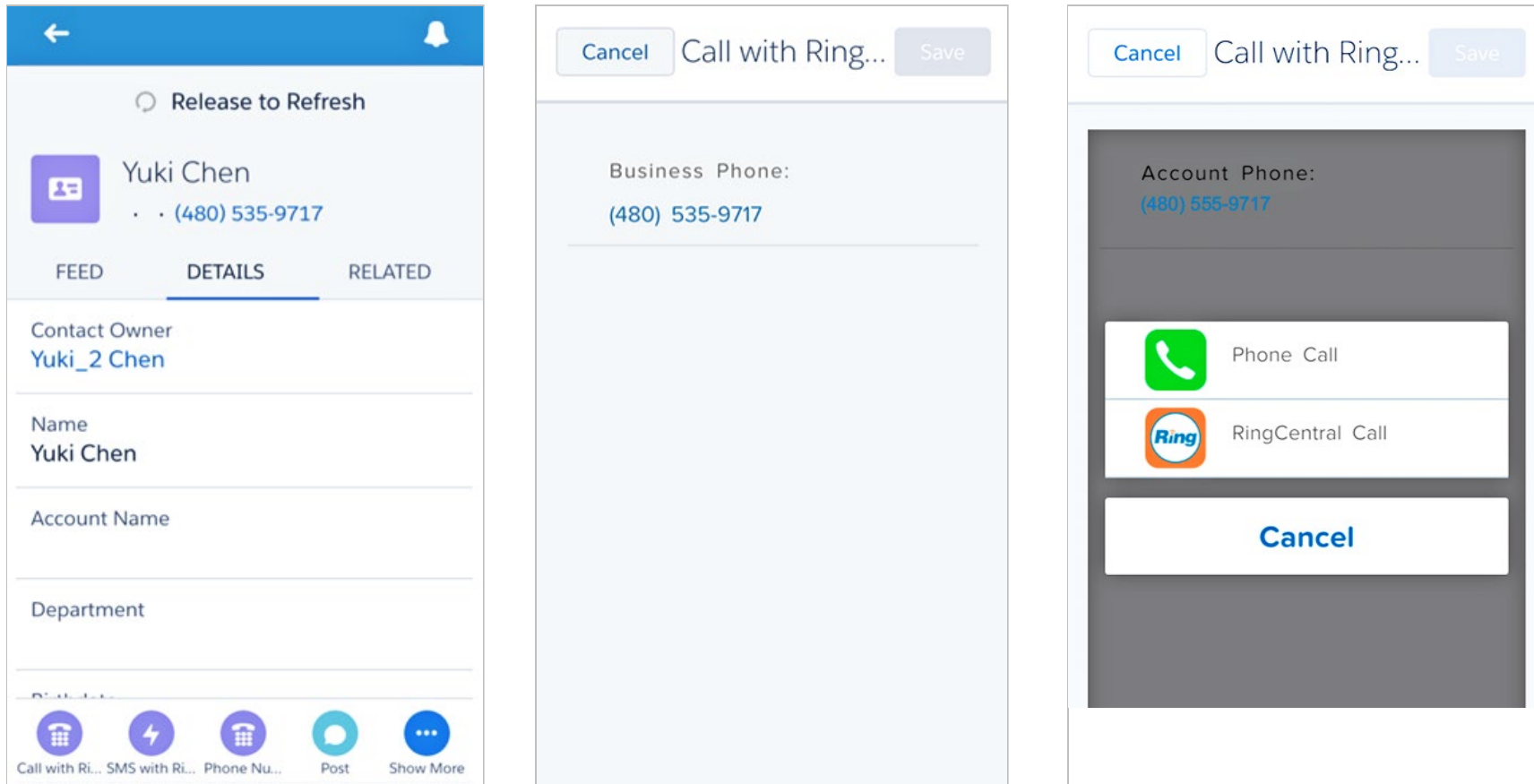
Figure 41

Clicking on the **Call with RingCentral** button will be re-direct you to a page with all the phone numbers of that account/contact/lead/case listed. Select   )
and click on a phone number. Select **Call with RingCentral** and the phone number will be dialed in your RingCentral mobile app.

Clicking High Velocity Sales is a Salesforce App that targets in
convert, and create new opportunities in one seamless works

Prerequisite: Please make sure High Velocity Sales app is ena

You can expand each Sales Cadence to view the list of Leads or Contacts listed within and click on the Lead/Contact to view more details
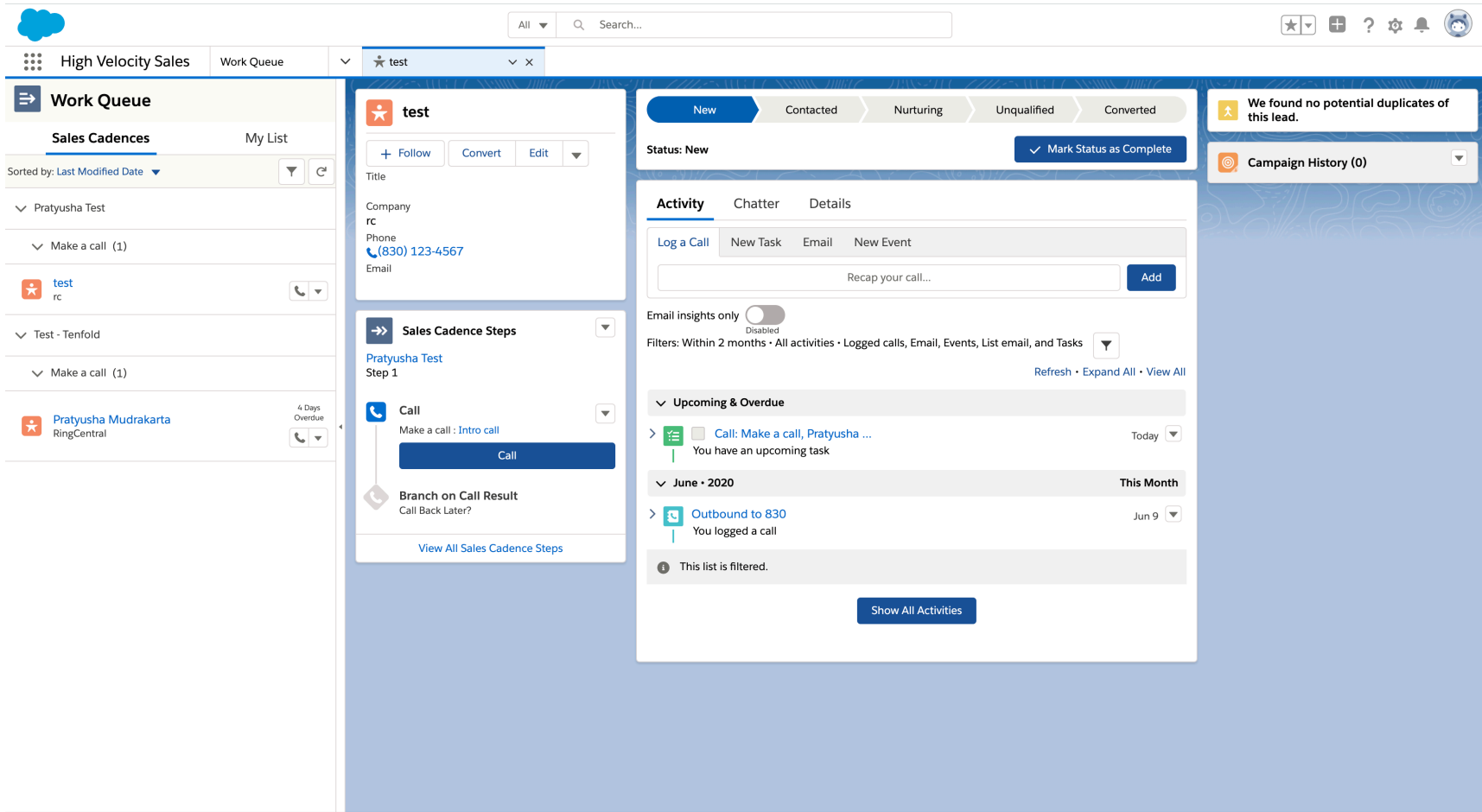
Figure 43

Place a call

Click on the call icon beside a Lead or Contact in the Work Queue to initiate a call. You will also notice that the Cadence moves forward under Activity Tab after you place the call.
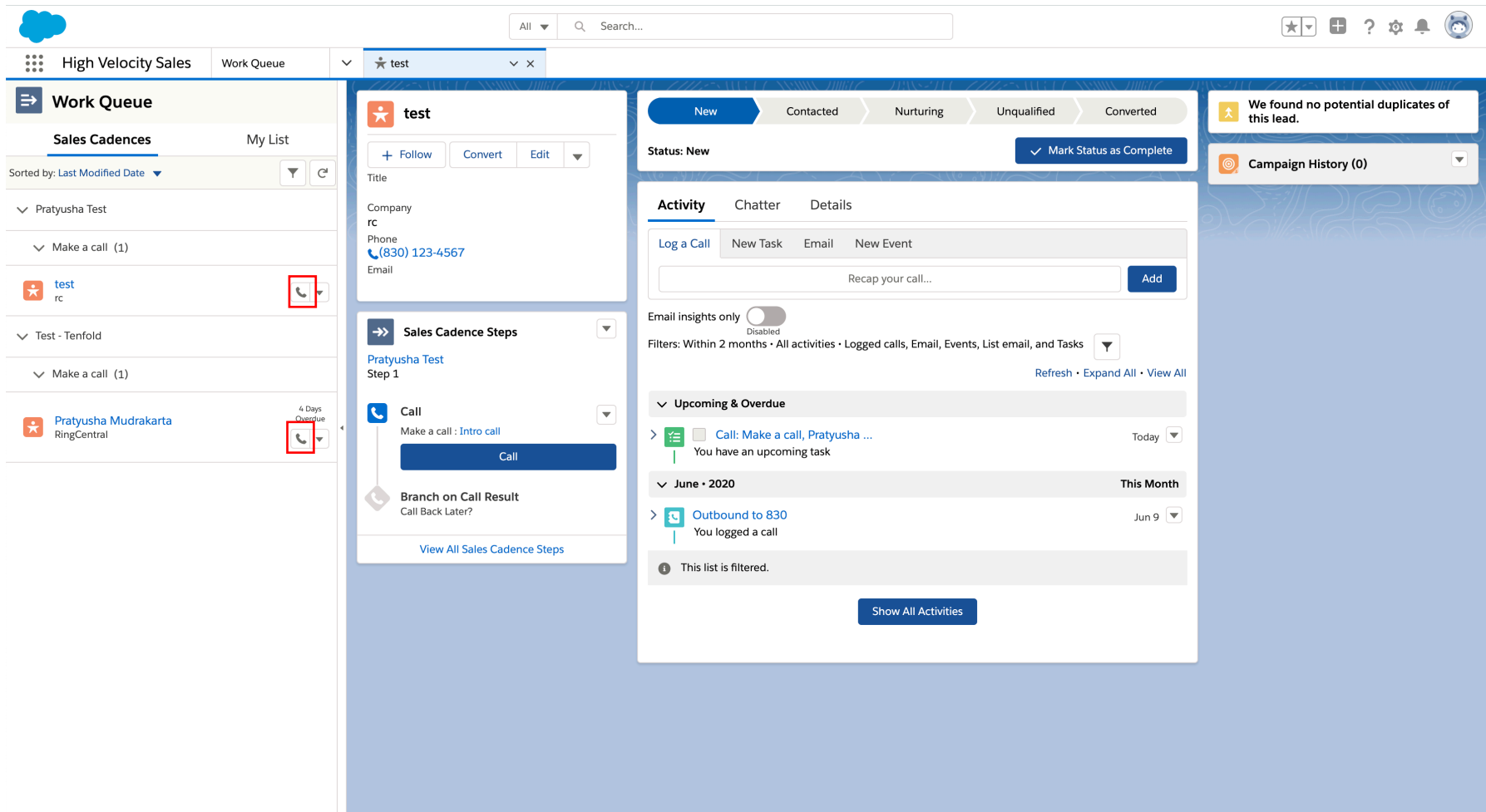
Figure 44

Depending on your calling settings, an outbound call will be initiated once the phone icon next to the Lead or Contact is clicked. If you choose to Call with Softphone, your RingCentral for Desktop will be initiated to place the call.

Once you have picked up the call on your RingCentral phone and it starts ringing the other party, the screen will get updated to following display. If the call is connected successfully, the RingCentral for Salesforce display will start showing a call timer and an area in which to take call notes and dispositions. You will also notice that the Sales Cadence moved forward under the Activity Tab showing the Outbound call activity.
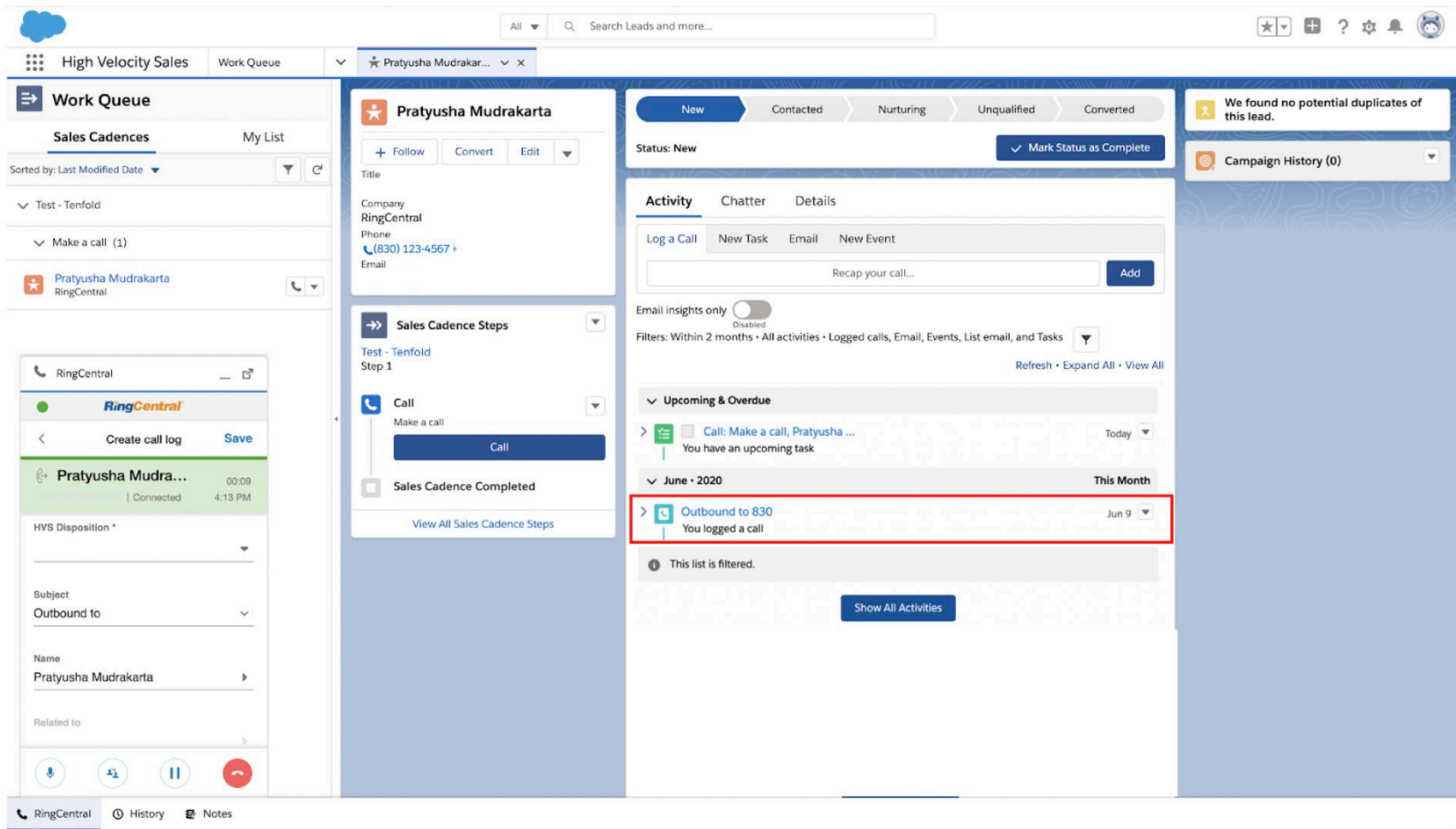
Figure 45

The Call log in RingCentral for Salesforce displays a field called **HVS Disposition**. You can select a value based on the call outcome from the drop-down list, which when selected, moves the Sales Cadence forward to the next action for this Lead/Contact.

Users with administrator access to your Salesforce account have the permission to mark the HVS Disposition a required field or not in the call log.

Figure 46

Call Logging

When Auto Log Calls setting is **enabled**:
In this scenario, once a value is selected for the **HVS Disposition** field, the call log gets auto saved and this causes the Sales Cadence to move forward to the next action.

If the HVS Disposition is marked a required field, the call log will not be saved and will show an alert if you navigate away from the call log without selecting a value
from the drop down. You can, however, find the call later in the call history marked with a red dot and select the HVS Disposition to move the Sales Cadence forward.

RingCentral®

Figure 47

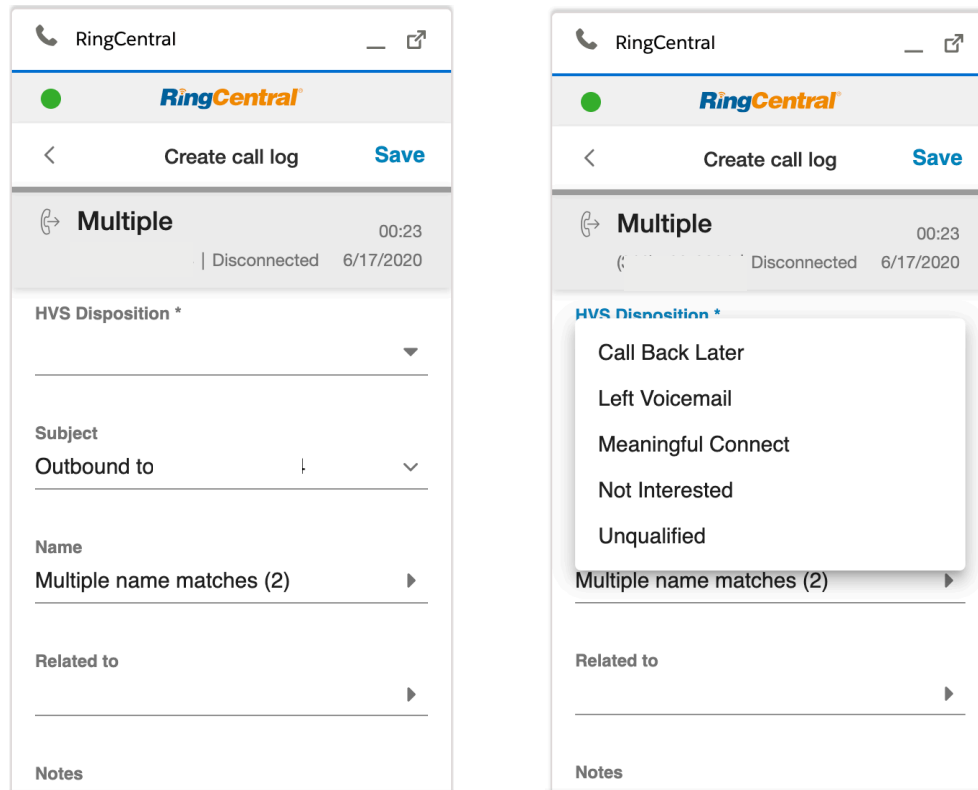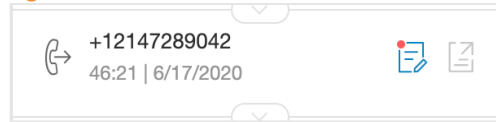When Auto Log Calls setting is **disabled**:
In this scenario, once a value is selected for the **HVS Disposition**, you would need to click on the **Save** button to log the call and move the Sales Cadence forward to the next action.

If the HVS Disposition is marked a required field, the call log will show an alert if you navigate away or try to click the **Save** button without selecting a value from the drop down. You can, however, find the call later in the call history marked with a red dot and select the HVS Disposition to move the Sales Cadence forward.

Note: Please note that once HVS Disposition field is filled with a value, it cannot be changed from the RingCentral for Salesforce widget. However, any changes made from the Salesforce interface for this field will be reflected in the widget

Custom Field

The field, HVS Disposition can also be a custom field instead, such as a Picklist (Plist) shown below. Users with administrator access have the permission to mark the field as required or not.
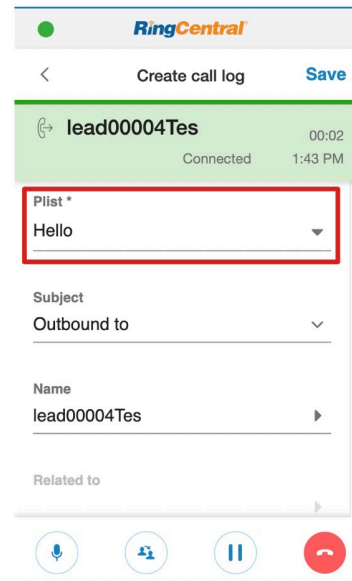

Figure 48

Troubleshooting

Q: I can't see RingCentral for Salesforce when I login to Salesforce. What is the problem? Does it require some special permission?

A: No, RingCentral for Salesforce does not require any special permissions and it should work for all user profiles. Please ask your Salesforce Administrator to ensure that you are a member of the Call Center and to ensure that no other components on the page are interfering with the operation of RingCentral for Salesforce.

Q: I don't see any new tab or window opening on incoming calls.

A: Please ensure that pop-ups are not blocked by your browser settings or by some other pop-up blocker software installed on your desktop.

Q: Can I use RingCentral for Salesforce across multiple Salesforce.com instances (or "orgs")?

A: Yes you can. You will need to contact your Salesforce Administrator to setup and enable RingCentral for Salesforce for each of your orgs.

Q: Can I use RingCentral for Salesforce across multiple browsers (Internet Explorer and Firefox, for example)?

A: RingCentral for Salesforce can be used across as many browsers as you want so long as the user is not logged into two or more browsers simultaneously. This means that the user cannot be logged into Salesforce.com on Internet Explorer and Firefox at the same time. Simultaneous logins are not supported.

Q: I make a call to myself, and the incoming call features are not working.

A: This behavior is expected—calls from your own extension to your own extension will not appear in this app.

Q: I can see some phone numbers in Salesforce, but the click-to-call icon is not displayed.

A: It may be due to some customizations made for your Salesforce account. Please contact your Salesforce Administrator.

Q: I cannot find the RingCentral call and SMS options in Salesforce1.

A: Please contact your Salesforce Administrator if the actions are added to the Page Layouts.

Q: I would like to disable this feature for now.

A: You will have to request that your Salesforce Administrator remove you from the Call Center profile list.

Q: What Operating Systems and browsers are supported?

A: The following Operating Systems are supported:
- Windows 7+
- Mac OS

A: The following browsers are supported:
- Google Chrome 56+
- Mozilla Firefox 52+
- Microsoft Edge
- IE 11
- Safari 11+ (Mac)