

Are you migrating from Desk.com to Service Cloud?

Here are a few tips to help you customize Service Cloud to mimic your Desk.com experience.

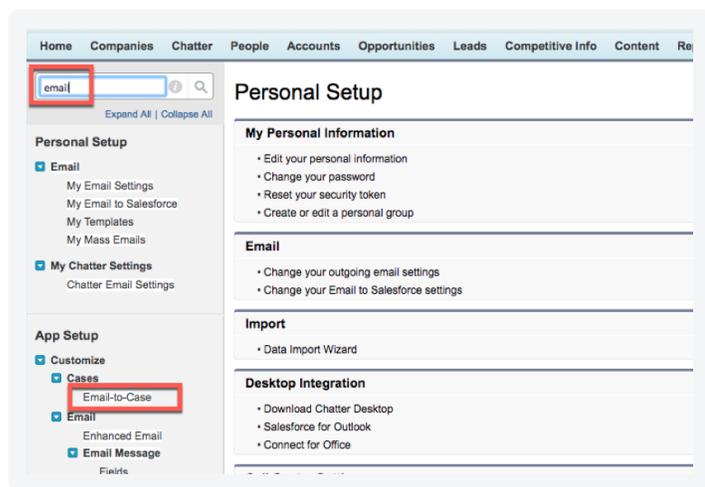
1. Set up Salesforce Email-to-Case
2. How to enable case pop-up in Salesforce for incoming calls

Any questions? Please reach out to partnerteam@ringcentral.com.

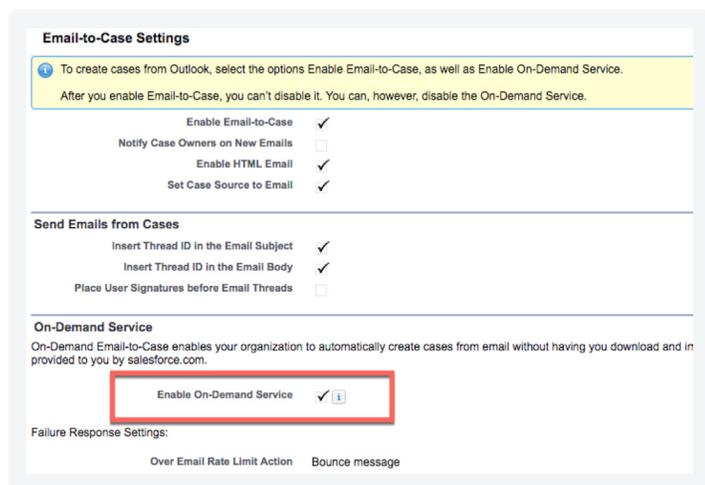
Section 1: Set up Email-to-Case

Salesforce will provide you with an email address that is used to route emails to create a case.

Go to “setup” and type “email” in the quick find bar and select “Email-to-Case” settings.



Once you are in the “Email-to-Case” setting, click the “Enable On-Demand Service.”



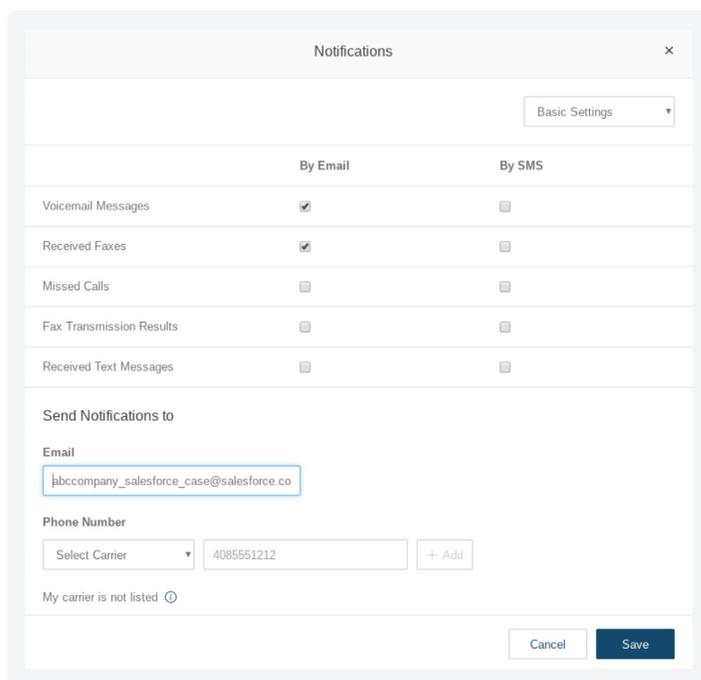
TIP: It is recommended you test Salesforce Email-to-Case routing outside of RingCentral notifications by sending an email directly to this email and verify the test case was created to make sure the case routing is working correctly.

Once you have the email address working and tested, save that email address in your message notifications in **RingCentral Service Website**.

RingCentral Service Website:

Log in to <http://service.ringcentral.com>

Click on Settings → Notifications → Edit



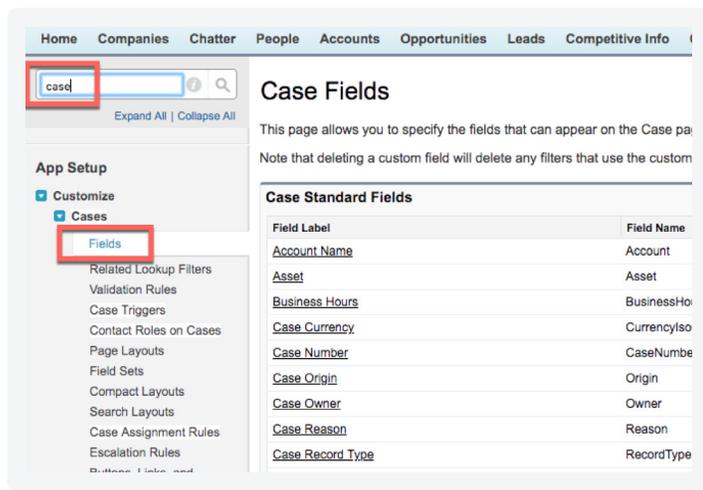
Select the voicemail by “email” option and enter your Salesforce routing email and click save.

Section 2: Enable case pop-up in Salesforce for incoming calls

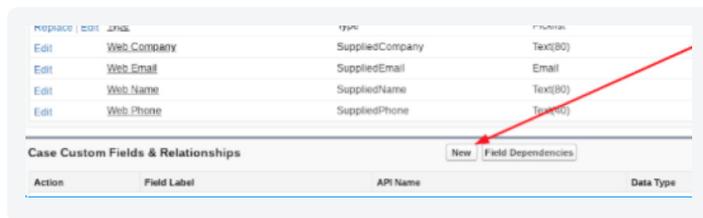
By default, Salesforce does not have a phone number field on cases. A phone number is required to look up cases or any other Salesforce object. You will need to add a phone field to cases so the phone number can be matched against an incoming caller's phone number.

Step 1:

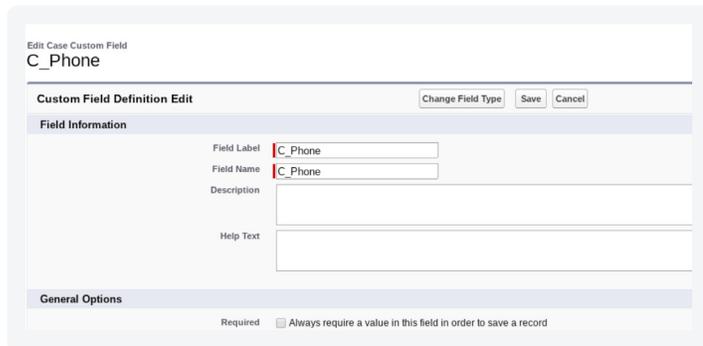
- Add a phone field in case object in Salesforce. If your admin has already added one, please skip this step.
- Log in to Salesforce as an administrator, go to Setup → Case (you can search “case” in the quick find box).
- Click on “Fields.”



Scroll to the bottom of the “Fields” screen and click “New” to add a new custom field.

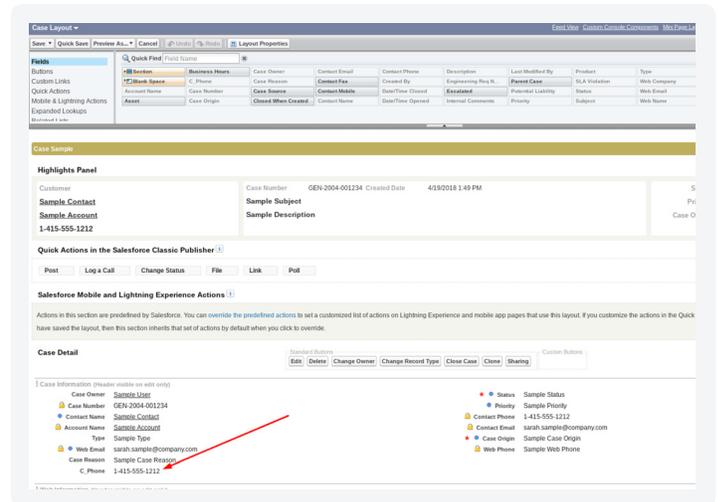


Add the field name.



Once completed, hit “Save.”

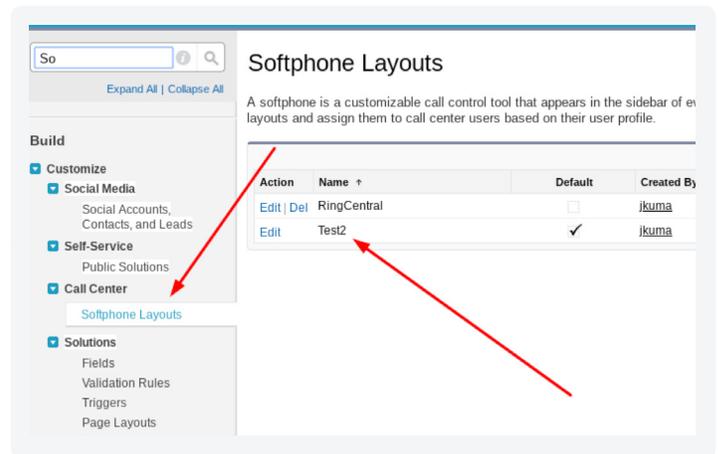
Then add it to your “case” page layout.



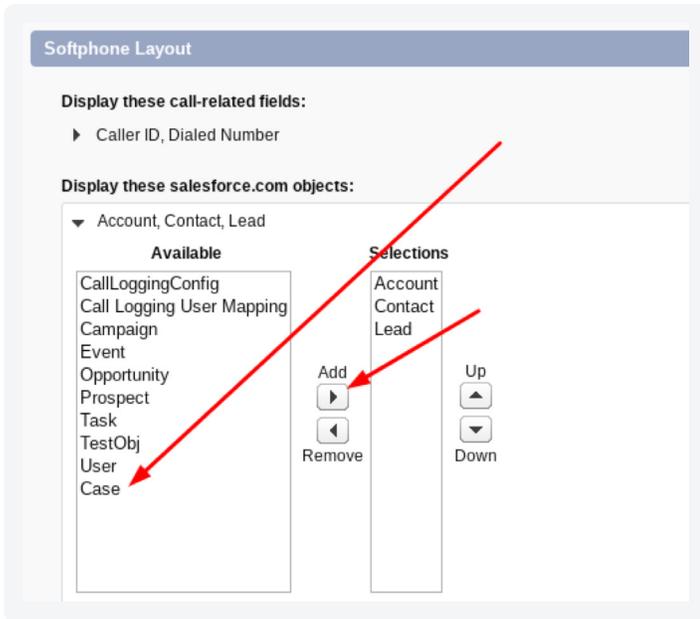
Step 2:

Enable cases to show up in incoming caller lookup.

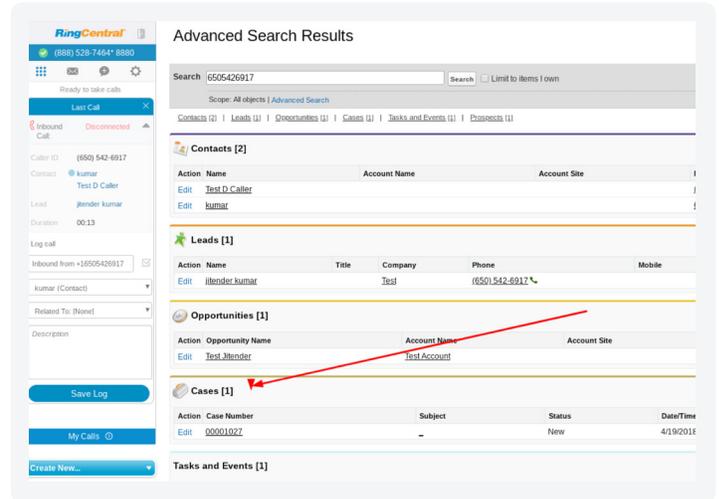
Log in to Salesforce as an administrator, go to Setup → Soft (in quick find box).



In the “Edit” screen, move the “case” object from the “Available” list to “Selections.” Depending on your needs, you can also move “Account, Contact, and Lead” out of your selection if your team will only focus on cases.



The following is an example of an incoming caller that matches multiple Salesforce entities. A matching case with the same phone number as the caller also pops up in search.



Edit the bottom section however you prefer. In this example, a “new case” is created when the caller’s phone number does not match any case.



Finally, click “Save” to complete the configuration for cases to pop up an incoming call.

For more information, please contact a sales representative. Visit ringcentral.com or call 800-378-8110.

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