

RingCentral for Salesforce

User Guide

For In-app Calling (WebRTC) & RingCentral Video

[For version 6.10.0 and above]



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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
- In app calling using browser and call controls for incoming and outgoing calls.
- New Language supports: IT, PR, JP, CN
- Call log notification
- Schedule a RingCentral meeting/Video 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

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.

Note: This user guide will show you how to use certain features of the RingCentral for Salesforce integration, such as scheduling RingCentral meetings/video meetings and calling using the browser (WebRTC), 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](#).

Requirements:

Before using RingCentral for Salesforce, you might need to install RingCentral desktop app, to make all functions work **if you have chosen “Call with Softphone”** as the outbound calling option in Settings. You can download

the desired app by clicking on [RingCentral Phone](#) or [RingCentral App](#). If you choose “Browser” as the outbound calling option, no additional RingCentral endpoints need to be installed.

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)
- **Windows:** Chrome v87, Firefox v84 & Edge(Chromium) v87; **Mac:** Chrome v87, Firefox v84 & Safari v14
- RingCentral Softphone or RingCentral App (Ignore if you chose “Browser” as calling option)
- .Net Framework 3.5
- 10-digit phone system

Basics

For optimal user experience, please 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*
3. 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*.
4. Login to Salesforce.com through the browser; the App will work only while the user is logged in to Salesforce.com.
5. Login to RingCentral for Salesforce through Salesforce.com. Use your RingCentral Direct Number for the user name and your RingCentral password.
6. Your browser has its pop-up blocker disabled for the Salesforce.com site.

Settings and Options

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

1. **Calling**
 - **Call with Softphone/Browser:** 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 RingCentral Softphone, RingCentral App and using the browser. 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
 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.
 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.

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 Salesforce for the scheduled meeting.

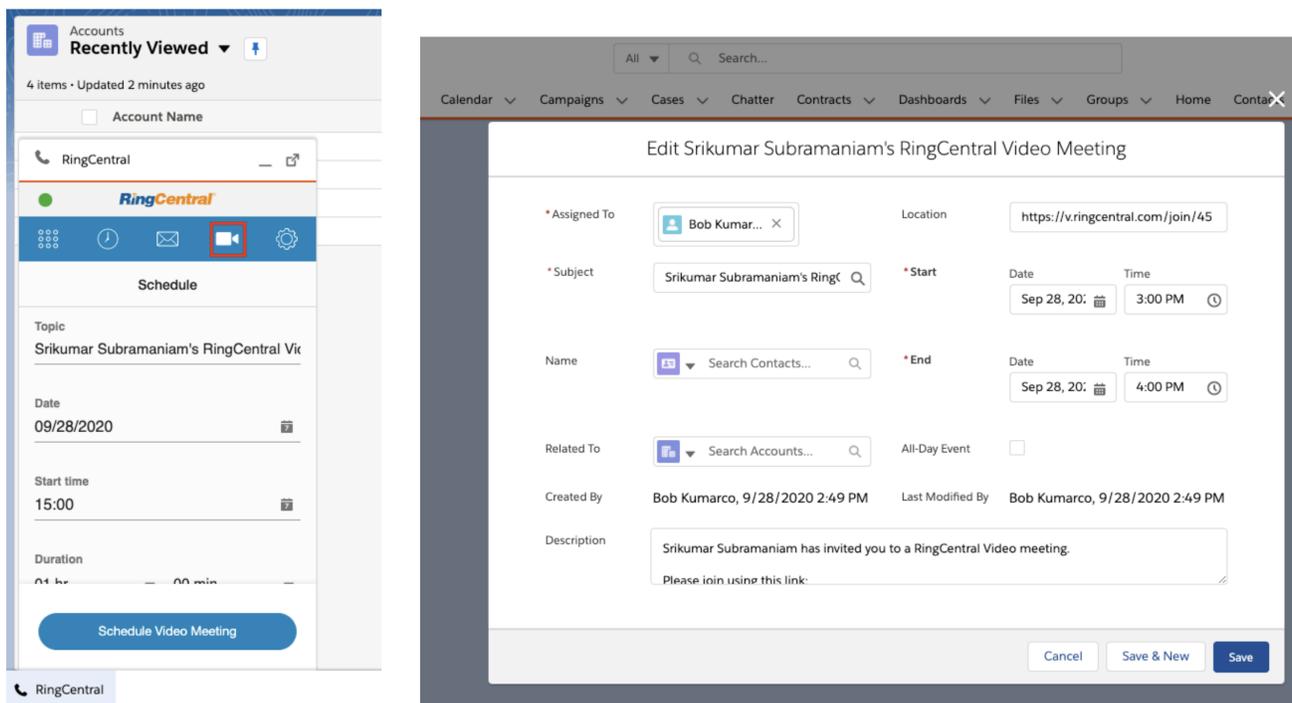


Figure 1

2. From Global Actions in Salesforce

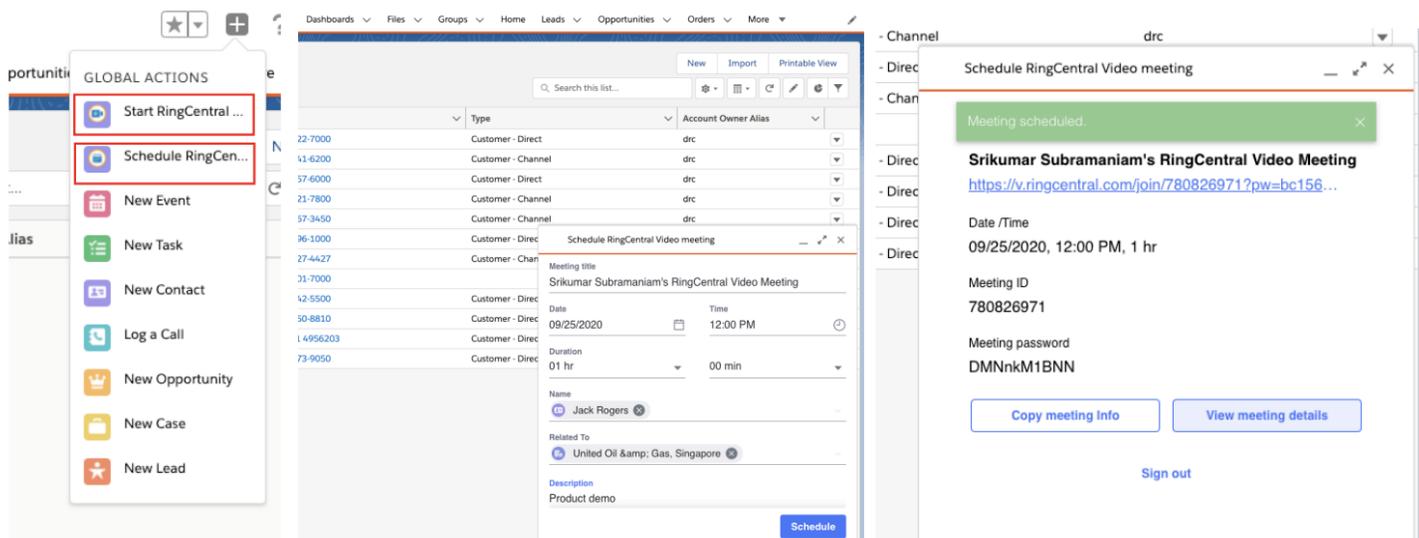


Figure 2

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.

In-app calling using Browser (WebRTC)

WebRTC functionality within the RingCentral for Salesforce integration allows users to leverage RingCentral calling capabilities (call controls & inbound and outbound calls) from within the CTI app without navigating away from the Salesforce interface and without any extra installation steps.

Users can enable this functionality by selecting **Browser** as the calling option from the Settings tab of the CTI app as shown in the image below.

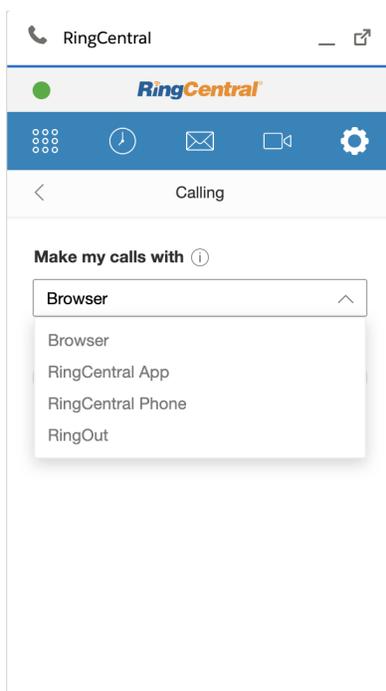


Figure 3

1. Outbound Calling:

Users can initiate an outbound call from the dialer in the RingCentral CTI, or Click to Dial from Salesforce interface or from the call history page in the CTI app.

When users make the outbound call, the call log screen is displayed with a matching record where the user can take notes and will be able to access the call controls displayed at the bottom of the CTI app.

Call controls are

- a. Mute
- b. Keypad
- c. More - Record, Hold and Transfer
- d. Hangup

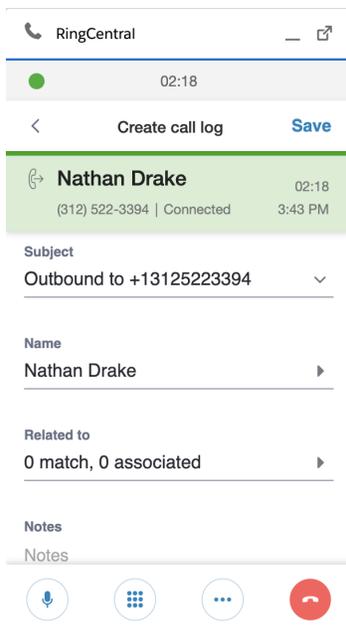


Figure 4

By clicking the More icon (3 dots), they can perform additional call controls like hold, record and transfer.

1. Transfer - When selected, the keypad pops open where users can enter a number they would like to forward the call and click the forward icon as shown in the image below.

Note: Only Blind/Cold transfers are supported, not warm transfer

2. Record - When selected, call recording will start and the user will be notified with the recording icon blinking both in the current call and from the global status bar of the CTI widget. Users can click stop recording from the more menu whenever done as shown in the image below
3. Hold - When selected, the current call is placed on hold and the call log displays the hold status with an orange bar. Users can select Unhold from the more menu as shown in the image below.

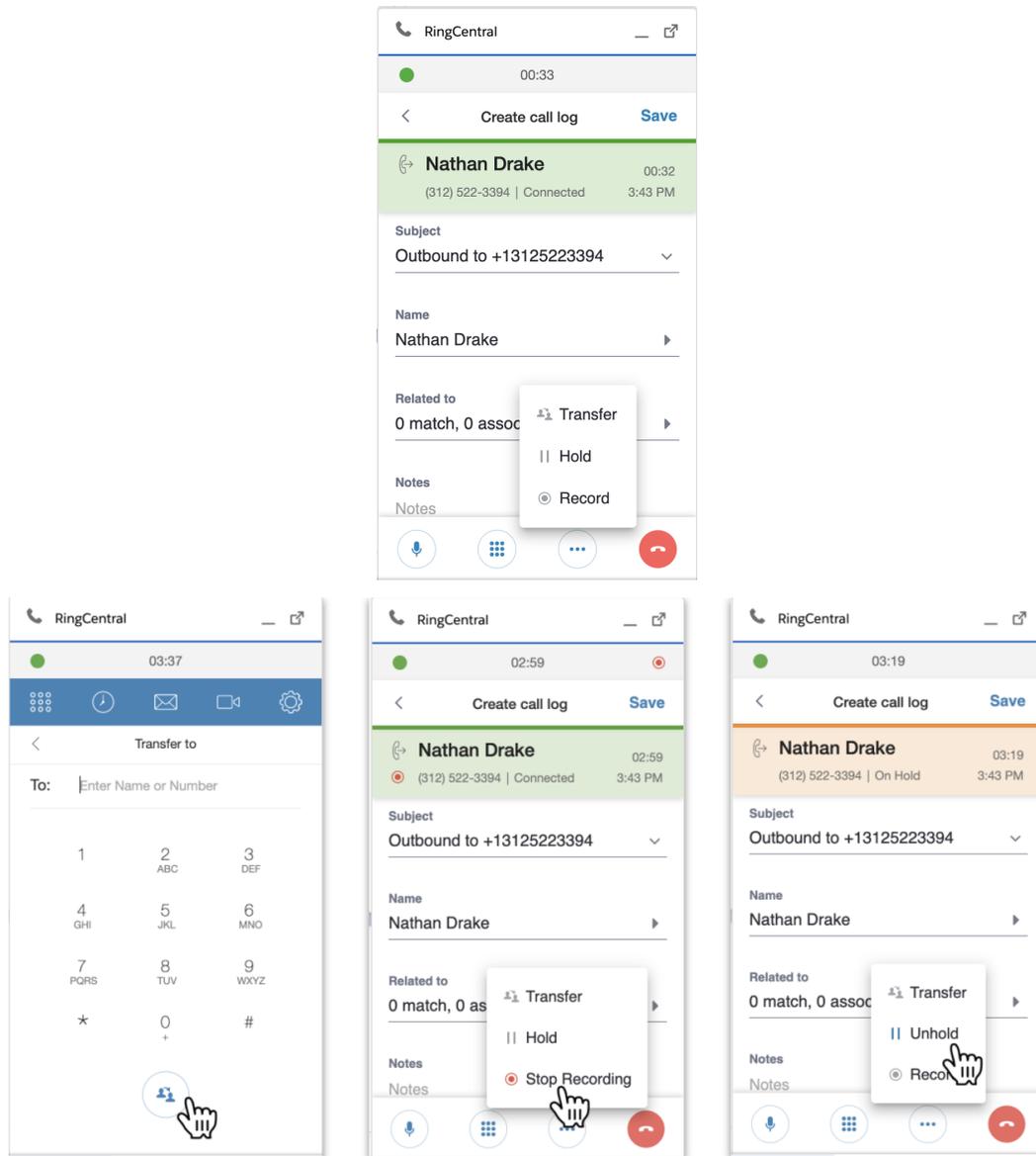


Figure 5

2. Inbound Calling:

During an incoming call, the CTI app responds by showing the call controls so users can pick up the call. The interface of the call controls differ depending on the users current interaction with the CTI app.

Scenario 1: User is on another tab within the CTI widget or is away from the CTI app entirely. The call log screen appears with a record match and screen pop. At the bottom of the call log screen, the user will have access to call controls below

1. Forward
2. Ignore
3. Hang Up and send to voicemail
4. Answer call

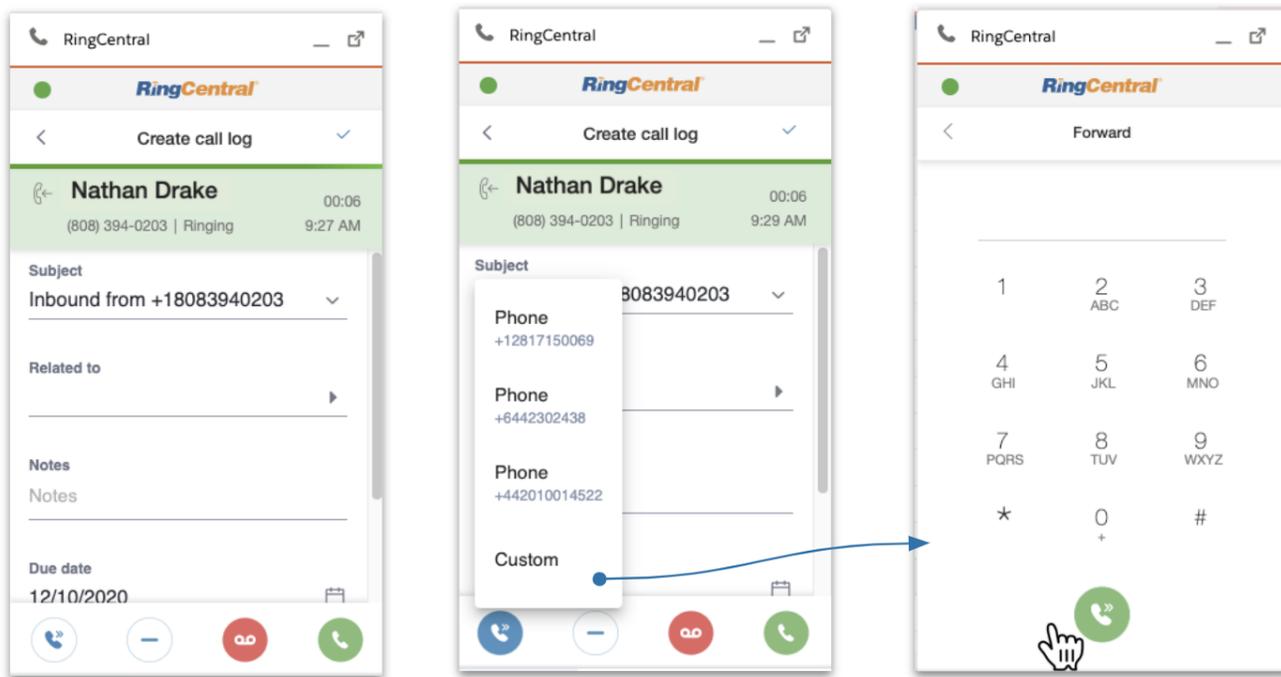


Figure 6

Scenario 2: User is actively logging a previous call in a call log screen. A pop up notification shows to the user where they will have access to the following call controls

1. Ignore - shows previous call log. Keeps ringing on any other devices
2. Forward - shows forward options
3. Answer - Shows the new call log screen
4. To Voicemail - shows the previous call log and hangs up the call for both parties

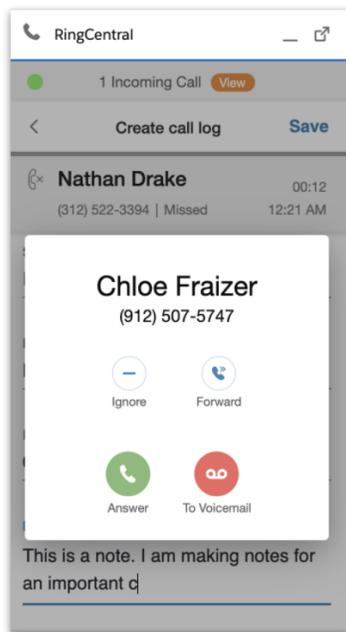


Figure 7

3. Multiple calls handling:

1. **Call Controls:** When a user is on an active call in the CTI app and a new inbound call comes in, a pop up notification shows to the user where they will have access to the following call controls
 - a. Ignore - shows previous call log. Call keeps ringing on any other devices
 - b. Forward - shows forward options
 - c. End & Answer - Ends the previous call, answer the new call and shows the new call & call log
 - d. To Voicemail - Stays on the previous call log, direct the new call to voicemail and closes the notification
 - e. Hold & Answer - Puts the current call on hold, answers the new call and shows the new call log. Previous call can be accessible from All calls page

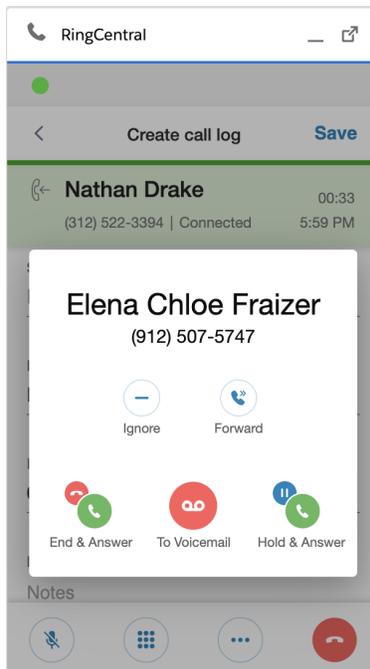


Figure 8

2. **All Calls page:** Users can access the All Calls page in the CTI app to view all the calls running in the background. Users can hold/unhold any calls or disconnect them or perform other displayed actions using the relevant icons. Some of the examples of different sections in the All Calls page
 - a. Ringing call - Shows new inbound calls that are still ringing. Once the call is answered, it will go to the current call section.
 - b. Current call - Shows the call that is ongoing on the call log screen
 - c. Ongoing calls on my other devices - Shows the calls that are ongoing on the other devices under the same RingCentral account. Users can click on switch icon to switch the call to the CTI

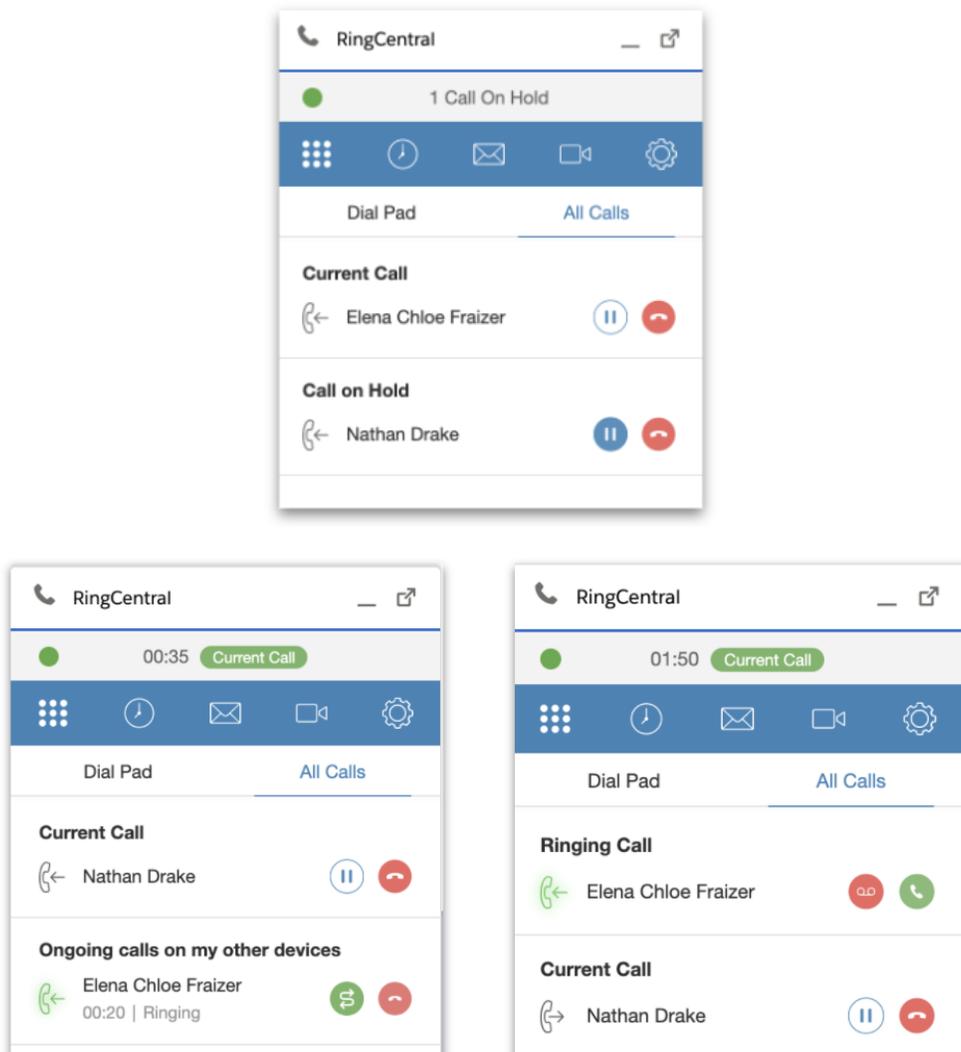


Figure 9

- 3. **Call Switch:** If the user is logged in with their RingCentral account on multiple devices/clients, they can always switch to take the call from the RingCentral for Salesforce CTI by clicking the green **Switch** button in the All Calls page

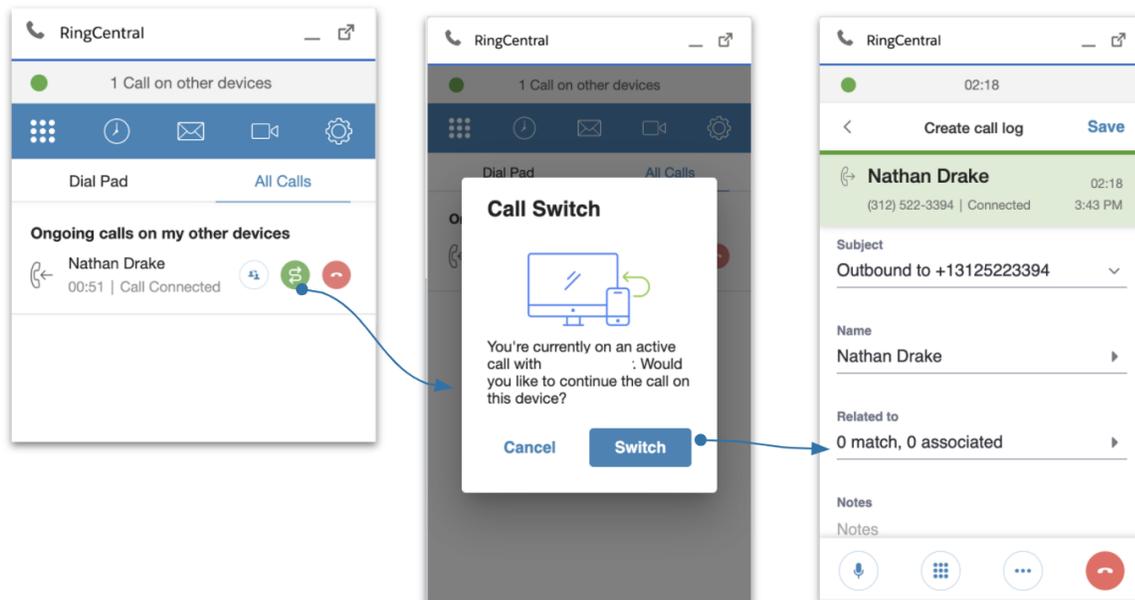


Figure 10

Example user scenario:

- Nathan is a user and is away from the Salesforce interface when he receives a call.
- He picks the call from his mobile phone, walks to his laptop to open Salesforce.
- Next, Nathan is taken to the All Calls page where he can switch his audio/call by clicking the green switch icon to route through RingCentral CTI widget as shown in the image.

Call Switch in browser tabs: If a user is logged in to Salesforce in multiple tabs and has an active call running in the CTI app, the CTI considers each of the different tabs as different devices/clients and shows the Switch option in All Calls page.

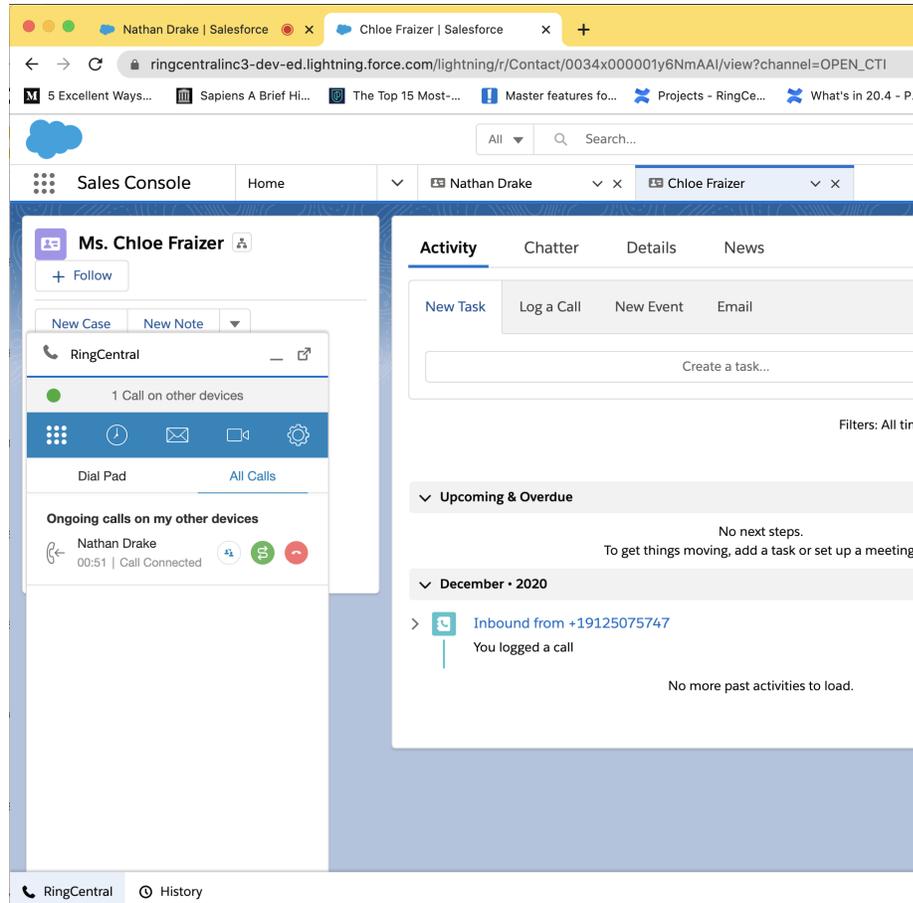


Figure 11

Note: For Google Chrome, users can always know in which tab the call is being routed through by following the blinking red dot on the browser tab as shown in the image.

4. Rotating call header:

When multiple calls are running on the CTI app, the header rotates to show the current call duration alternating with a **View button** to go to the All Calls page.

Once the user is in All calls page, users can click on the **Current call button** to go to the call log screen of the ongoing call

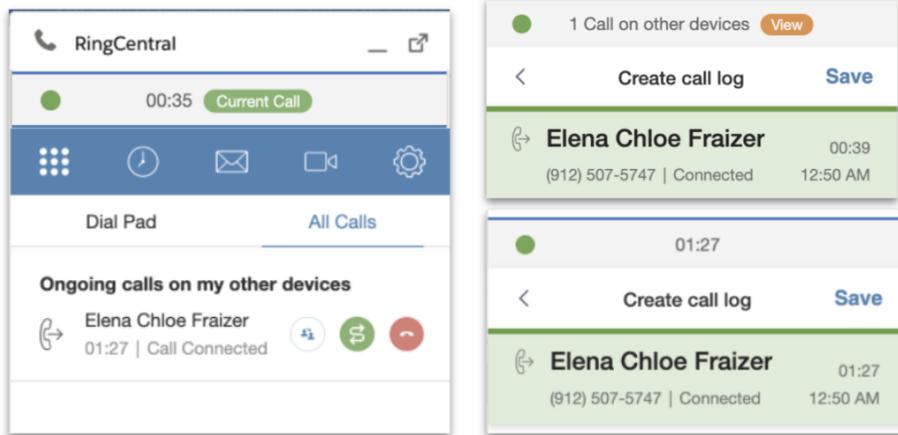


Figure 12

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 set up 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

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