

RingCentral for Desk

Admin Guide

Contents

- Introduction 3**
- About RingCentral for Desk. 4
- About this Guide 4
- About Desk. 4
- Setting up RingCentral for Desk 5**
- Navigate to Phone Channels. 6**
- Add Integration 7**
- Enter Phone Integration 8**
- Troubleshooting 9**

Introduction

About RingCentral for Desk

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

It offers these features:

Complete cloud-based app

- Use your browser on any platform (Windows®, Mac®); no software installation is needed.
- Make or receive calls through the RingCentral phone system, directly from your account within Desk.

Increase call efficiency

- With simple click-to-dial from within Desk, you can spend more time servicing clients and less time dialing.
- Save time by eliminating misdials.

Enhance customer interaction

- Incoming callers are instantly matched to existing client records, which are automatically displayed.
- Tickets are created when a call is accepted by an agent.

About this Guide

This guide is specially designed for Administrators of Desk. This guide is not intended for Desk users and does not provide any information on how to use the application or any related information. This administrator guide will show you how to set up your Desk instance to enable users of RingCentral for Desk.

About Desk

Desk is customer service software based in the cloud. It features a simple interface that will feel familiar to users. To enhance the customer experience, Desk integrates other cloud based services such as Salesforce, JIRA, and Google Apps.

Desk includes ticketing, self-service options, and the most-needed customer support features.

Desk streamlines customer support with time-saving tools such as ticket views, triggers, and automations. This helps you get straight to what matters most – better customer service and more meaningful conversations.

Setting up RingCentral for Desk

Navigate to Phone Channels

Sign in as an administrator to Desk.com and click **Settings** in the top navigation bar. Click **Site Settings** and set **Phone Integrations** to **On**.

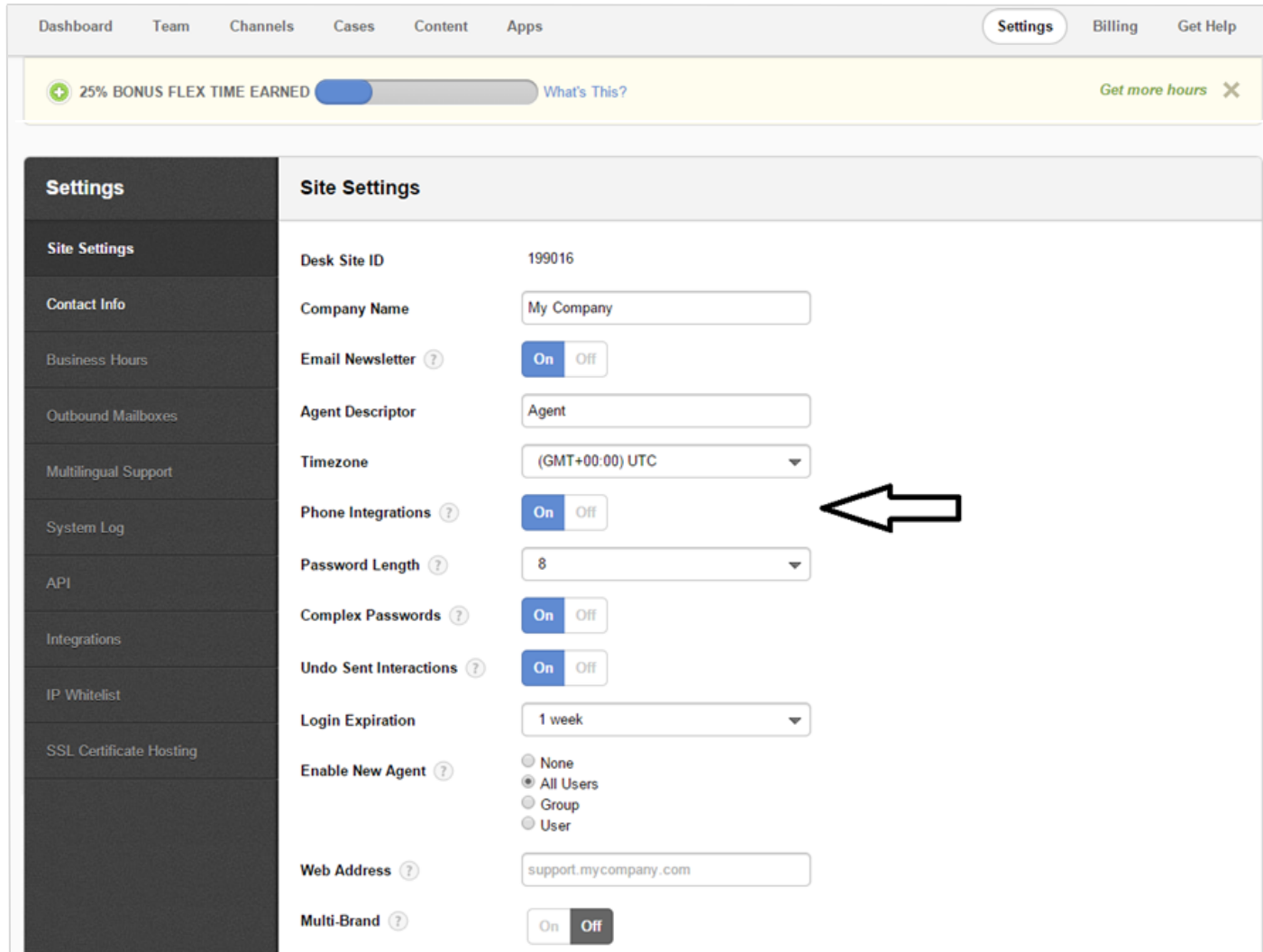


Figure 1

Add Integration

Click **Channels** in the top menu bar. Click **Integrations** in **Phone** section and click **Add Integration**.

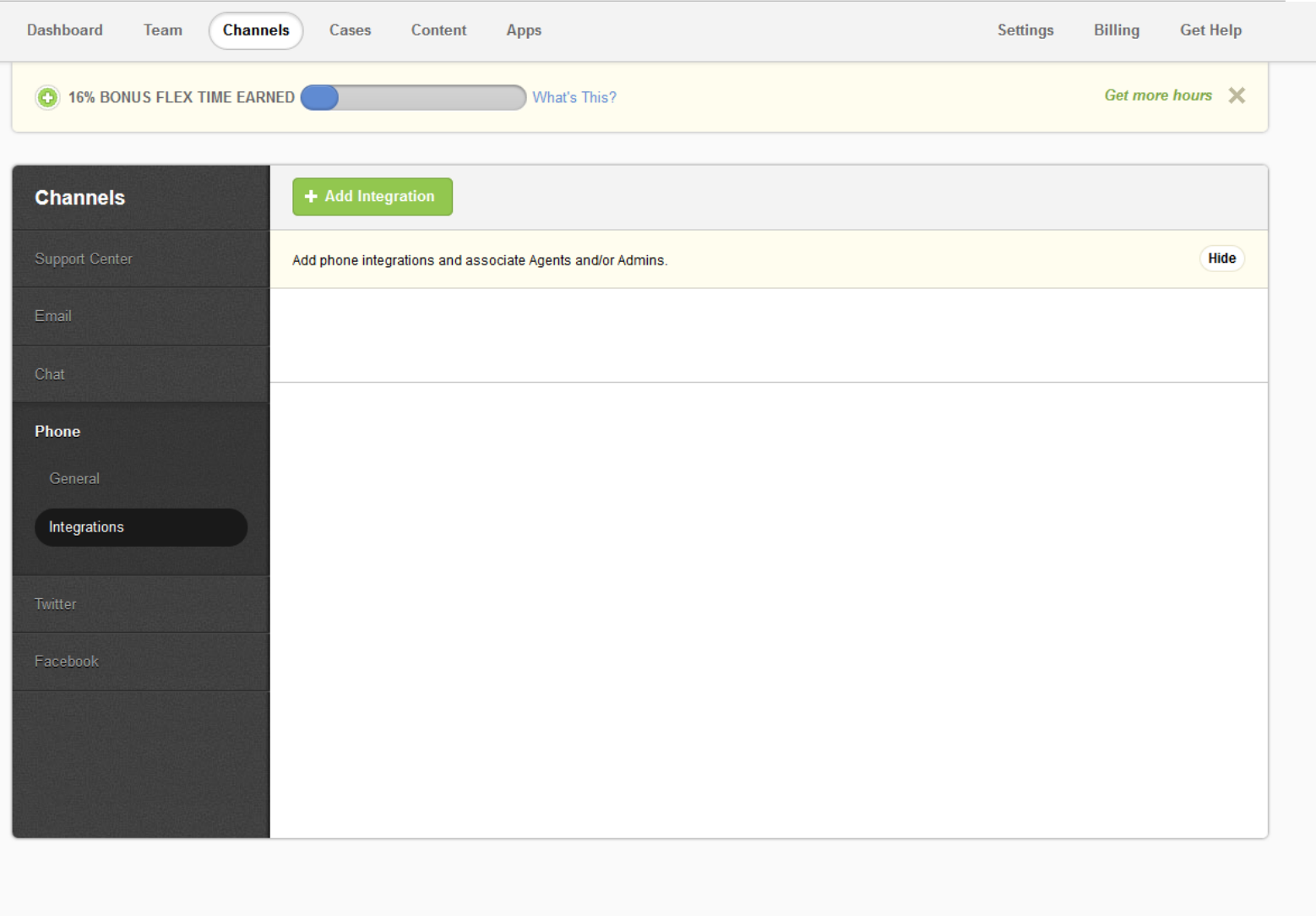


Figure 2

Enter Phone Integration

Enter the following details:

Name: RingCentral URL: <https://ringcentraldesk.s3-us-west-1.amazonaws.com/index.html>

Height: 200, Width: 200

Add users who you want to grant access to.

Phone Integration

Name

URL

Height

Width

All Members (2)

John Doe
john@mycompany

James Davis
james@mycomp

or Cancel

This Item was created by System 5 days ago at 11:37AM. It was Last updated by System 5 days ago at 11:39AM.

Figure 3

Troubleshooting

Q: Which browsers are supported?

A: The following browsers are supported by RingCentral for Desk:

- Internet Explorer 11 + (Windows XP, 7 , 8 or higher)
- Firefox 25 + (Windows, Mac)
- Chrome 30 + (Windows, Mac)
- Safari 6.0.5+ (Mac)

Q: On logging into RingCentral for Desk, users are getting this error message: “Your RingCentral edition does not support Desk Integration - please call your RingCentral account representative to upgrade your RingCentral edition.” What does that mean?

A: Desk integration is available for RingCentral Office Premium and Enterprise Editions only. Please contact your RingCentral representative for more information..