

RingCentral for Desk

User Guide

Contents

Introduction	3
About the RingCentral for Desk	4
About this Guide	4
About Desk.	4
Basics	6
Login	7
Options	8
Placing and Receiving Calls.	10
Dialer	10
Click to Dial	10
Outbound Call	11
Incoming Call	12
Troubleshooting	13

Introduction

Note: This guide assumes that RingCentral for Desk is already installed in your company's Desk instance by your company's Desk administrator.

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.

Note: RingCentral for Desk is available for Office Premium and Enterprise customers.

About this Guide

This guide is specially designed for Desk users after RingCentral for Desk is installed and enabled by their company's administrator. This guide is not intended for system/network administrators and does not provide any information on how to set up the application or how to configure the Desk 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.

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.

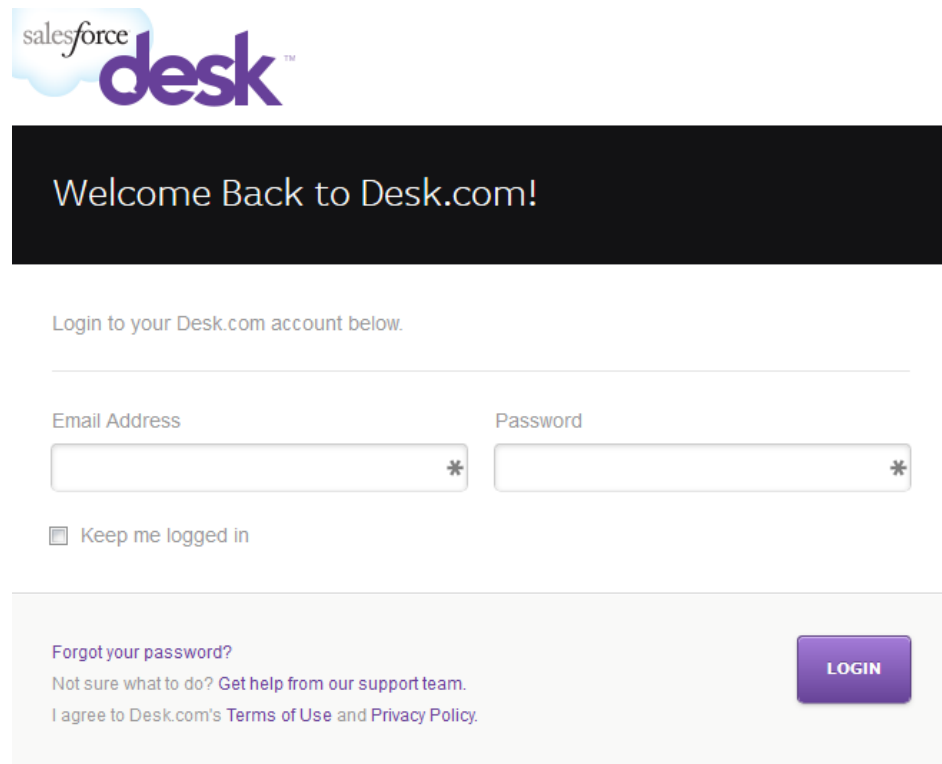
Desk streamlines customer support with time-saving tools such as ticket views, triggers, and automations. This helps you get straight to what matters most — better customer service and more meaningful conversations.

Basics/Options

Basics

For optimal user experience, ensure that:

- The browser you are using is a supported version.
- You have set the correct number as your RingCentral Direct Number – you will be making and receiving calls from this number through the Desk interface. You can find your RingCentral Direct Number by logging into your account. Click **Settings >Phones and Numbers > Direct Numbers**.
- Login to your company’s Desk instance through the browser. The URL may look like <https://yourcompanyname.desk.com/>
- The App will work only while the user is logged in to Desk.com.



salesforce desk™

Welcome Back to Desk.com!

Login to your Desk.com account below.

Email Address Password

* *

Keep me logged in

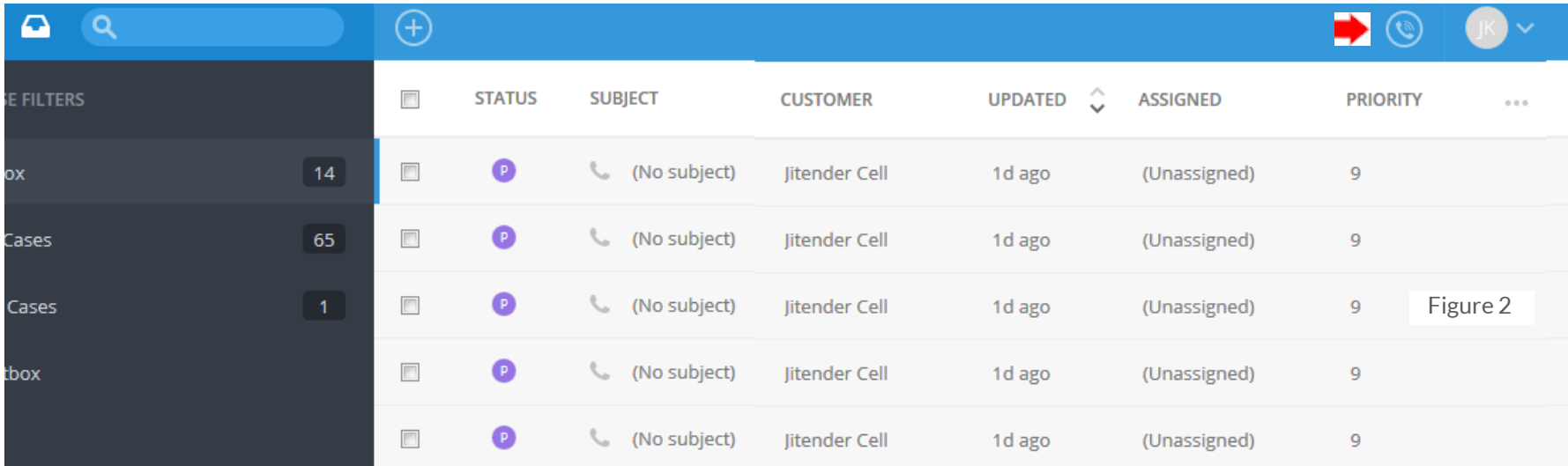
Forgot your password?
Not sure what to do? [Get help from our support team.](#)
I agree to Desk.com's [Terms of Use](#) and [Privacy Policy](#).

LOGIN

Figure 1

Login

Once you are logged into the Desk NextGen Interface, you will see a Phone Icon on the top right-hand side. (See Figure 2 below.) Make sure your Desk administrator has configured the phone integration for you.



Login to RingCentral for Desk through Desk.com. Use your RingCentral Direct Number for the user name and your RingCentral password. Select **Remember me** to stay logged in to RingCentral App for one week. (See Figure 3 below.)

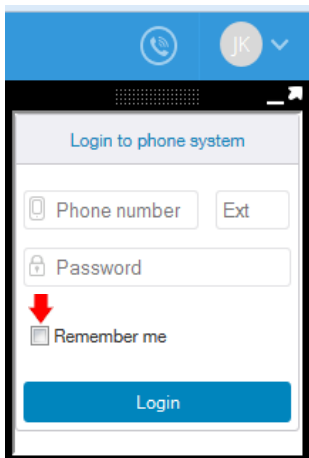


Figure 3

Options

There are only two options to set. You can get to these options by clicking on the gear icon in the top navigation bar.

1. **Direct Number:** This is the number from which outgoing calls will be made. This field cannot be left blank.
2. **Press 1 To Start A Call:** When you make an outgoing call, RingCentral will first call you at your RingCentral Direct Number. Once you answer the call, you will have an option to press “1” before the call is connected to the other party. If this option is not enabled, then RingCentral will call your number and the dialed number simultaneously.

Click the “Save” button to save your settings. These settings are cleared when the user logs out of the application, but will persist if the user logs out from the Desk instance without logging out from the application and also selected the option “Remember Me” on the login screen while logging in.

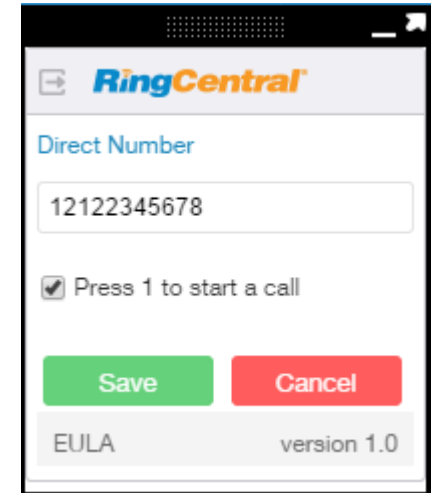


Figure 4


Placing and Receiving Calls

Placing and Receiving Calls

Dialer

Once you save the settings, you are presented with a dialer screen.

In order to make an out bound call you can use either number button on the dial pad or type a number directly in the text box.

You can hide the dialer by clicking on the  or the  button.

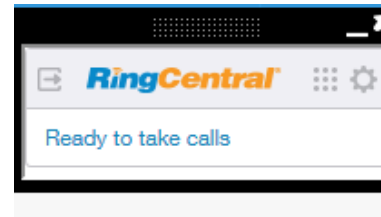


Figure 6

Click to Dial

You can also use click to dial feature to make an outbound call. Once you are logged in successfully to RingCentral for Desk. All of the phone numbers on your Desk pages become clickable links.

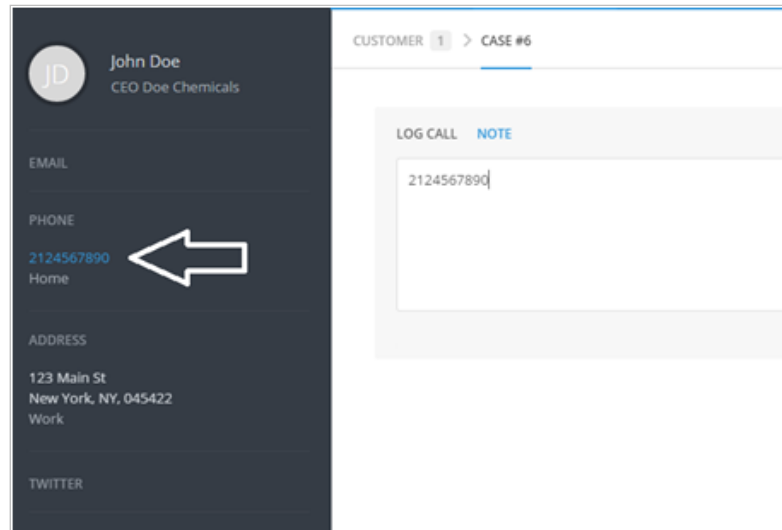


Figure 7

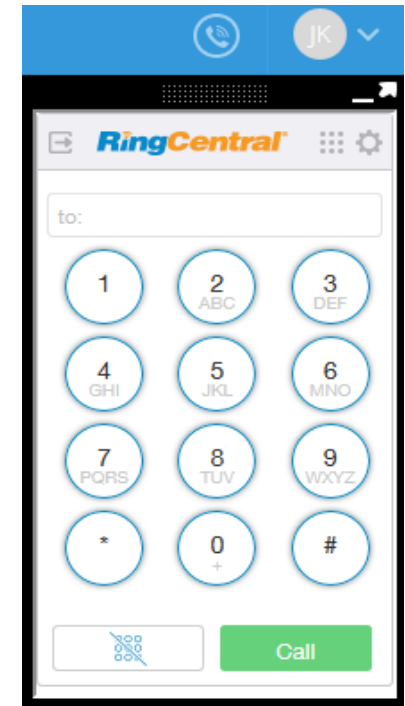


Figure 5

Outbound Call

You can also use the click to dial feature to make an outbound call. Once you are logged in successfully to RingCentral for Desk. All of the phone numbers on your Desk pages become clickable links.

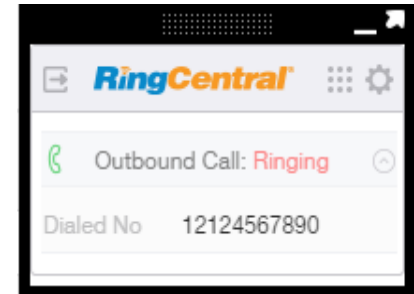


Figure 8

After you accept the call on your RingCentral device, you are prompted to press one depending on whether you have selected the check box on your setting screen. After you press 1, the destination phone will ring.

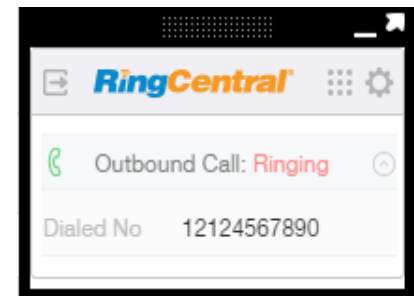


Figure 9

Once the call is disconnected, the status is shown on RingCentral for Desk.

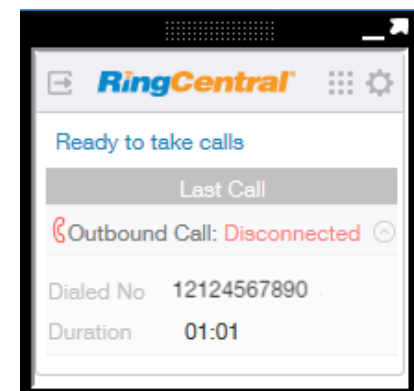


Figure 10

Incoming Call

When you have an incoming call, RingCentral for Desk will show you an indicator. A matching customer will pop up in a new tab and a new case is also created for the customer automatically.

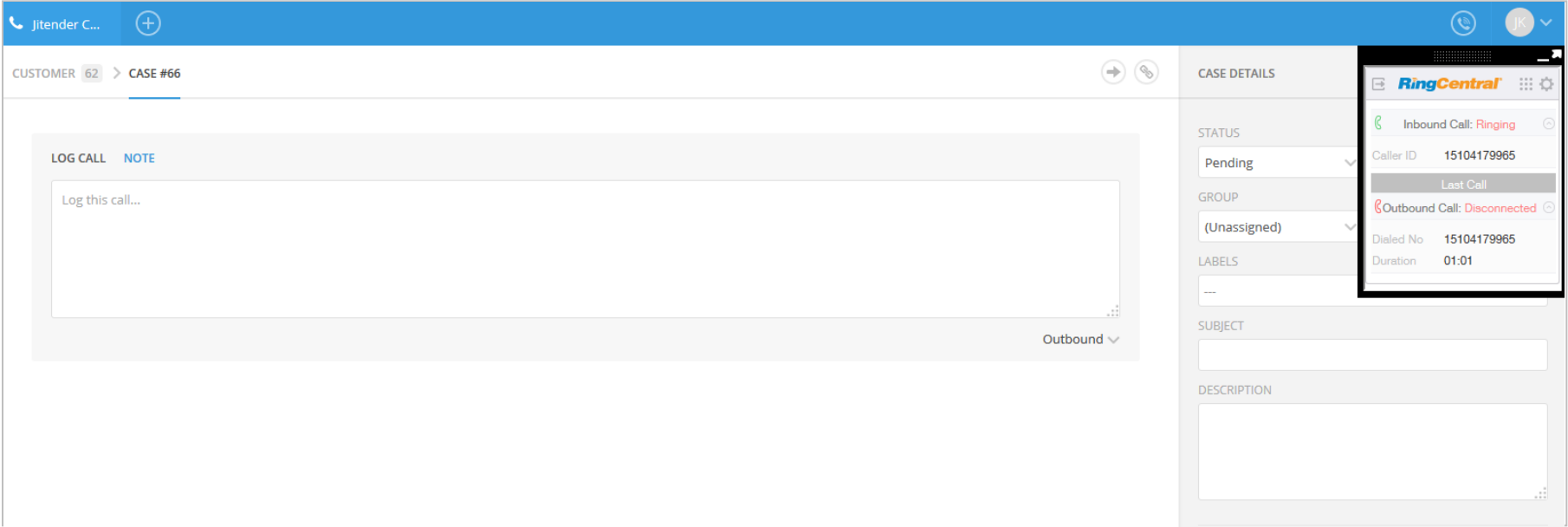


Figure 11

Troubleshooting

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

A: No, RingCentral for Desk does not require any special permissions and it should work for all user profiles. Please ask your Desk Administrator to ensure that RingCentral for Desk is enabled for the Desk role you are a member of.

Q: Can I use the same RingCentral for Desk across multiple Desk instances?

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

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

A: The same RingCentral for Desk 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 Desk 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 RingCentral for Desk.

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

A: You will have to request that your Desk Administrator remove the Desk user role that you belong to from RingCentral for Desk via settings.

Q: What Operation Systems are supported?

A: The following Operating Systems are supported:

- Windows XP, 7, 8 and above.
- Mac OS X Mountain Lion and above.

Q: What browsers are supported?

A: RingCentral for Desk supports the following browsers:

- Internet Explorer 10 or later (Windows)
- Firefox 25 or later (Windows, Mac)
- Chrome 30 or later (Windows, Mac)
- Safari 6.0.5 or later (Mac)