

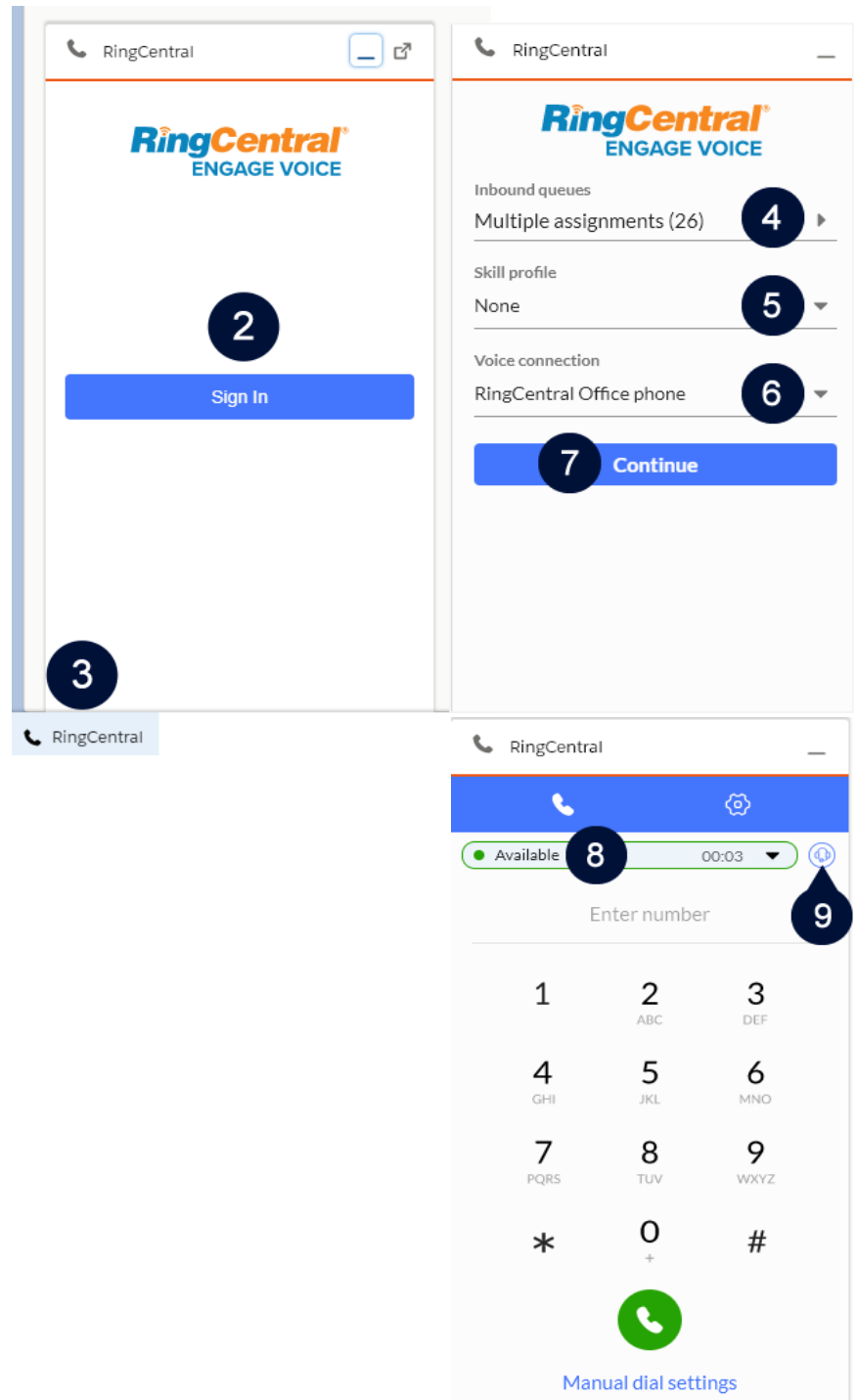
USING SALESFORCE FOR AGENTS

This job aid provides the basics for how to leverage the RingCentral Engage Voice Integration with Salesforce, which allows you to quickly update Salesforce without having to copy/paste information from one screen to another.

ACCESSING SALESFORCE FOR RINGCENTRAL ENGAGE

1. Access Salesforce through your browser as normal.
2. Click **Sign in** and enter your login credentials.
3. If you do not see the option to sign in, click the **RingCentral CTI** widget in the lower-left corner to display.
4. Select the desired **Inbound Queues** as needed.
5. Select your **Skill profile**, if applicable.
6. Select the desired **Voice connection** option:
 - **RingCentral Office phone.** Connects to your RingCentral extension automatically.
 - **Use external phone.** If selected, you must also enter the phone number. Typically, this is your telephone number or Contact Center Routing Number. Refer to your admin team for direction.
7. Click **Continue**.
8. Confirm that the agent state is **Available**.
9. If you are ready to take calls, confirm that the **Persistent Voice Connection** is turned on.

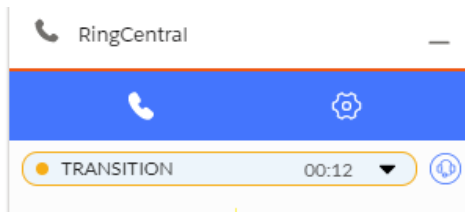
This maintains a connection with the Engage Voice system. For most agents, this is the ideal state. If you need to make calls outside of the Engage Voice contact center environment, check with your admin.



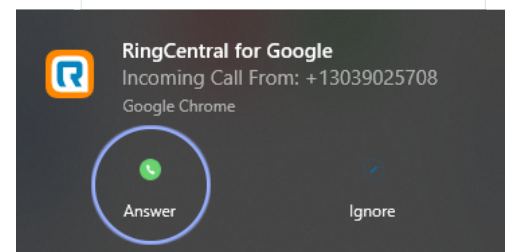
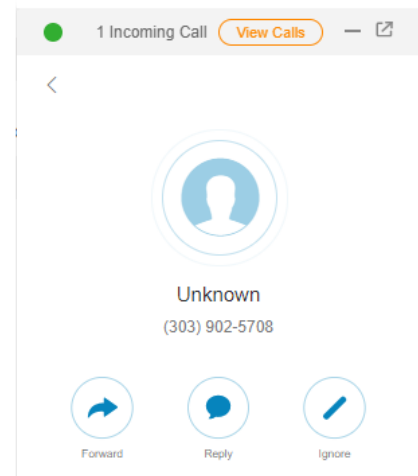
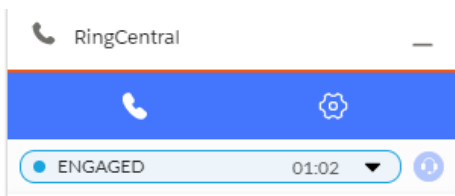
ANSWERING CALLS

Calls will ring on the [RingCentral softphone](#), deskphone, or the telephone number/Contact Center Routing Number entered.

When a call comes in, the agent state changes to **TRANSITION**.



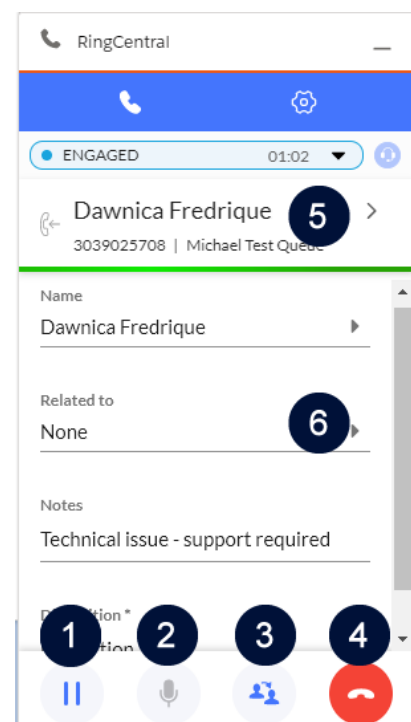
Once the call is answered, the agent state changes to **ENGAGED**.



USING SALESFORCE

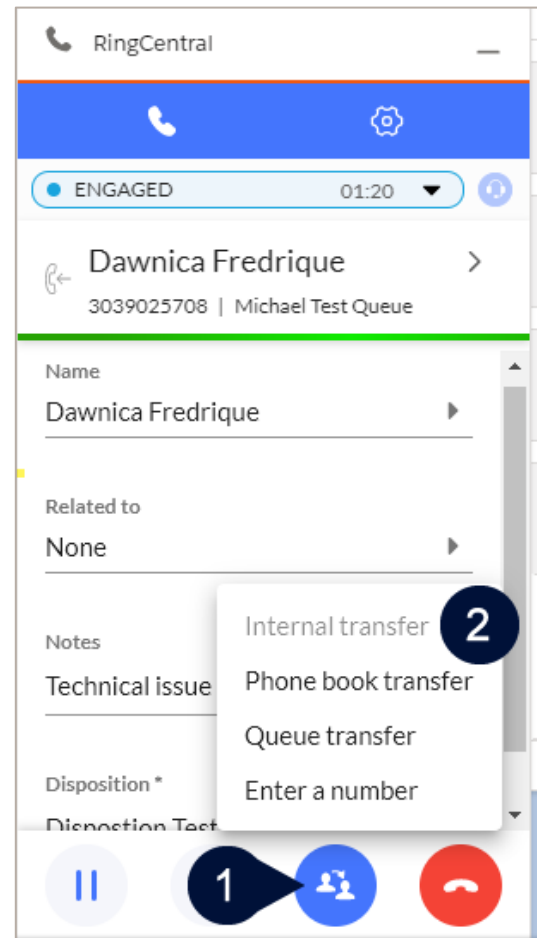
Use the following call controls within Salesforce for a better experience and improved call handling. In addition, update Salesforce directly in the integration window. Note that the options will vary depending on your Salesforce configuration. The options for Classic and Lightning are similar (Lightning version is shown).

1. Hold/Resume
 2. Mute/Unmute
 3. Transfer
 4. Disconnect
 5. Associated record match
 6. **Related to** Salesforce fields
- Note: These options may vary depending on the configuration of your Salesforce instance.



TRANSFERRING CALLS

1. Within an active call, click **Transfer**.
2. Select the type of Internal transfer:
 - **Phone book transfer** – Select a name from the phone book.
 - **Queue transfer** – Select the queue information.
 - **Enter a number**
3. Complete the transfer.



DISPOSITIONING CALLS

Agents can disposition calls during the call or immediately after the call disconnects (depending on the queue configuration).

1. Enter **Notes**, if needed.
2. Click the **Disposition** drop-down menu and select the appropriate disposition.
3. Post-call action (Pending Disposition): Confirm the disposition and click **Submit**.
4. A confirmation displays.

The image displays two side-by-side screenshots of the RingCentral interface, illustrating the call disposition process.

Left Screenshot (Pending Disposition):

- At the top, the status is "Pending Disposition" with a timer at 00:03.
- The contact information for "Dawnica Fredrique" is shown, along with the phone number "3039025708" and the queue "Michael Test Queue".
- Below the contact info, there is a "Notes" field (labeled 1) containing the text "Technical issue - Support required".
- Below the notes, there is a "Disposition" dropdown menu (labeled 2) currently set to "Complaint".
- At the bottom, there is a blue "Submit" button (labeled 3).

Right Screenshot (Available):

- A green banner at the top indicates "Log is saved successfully." (labeled 4).
- The status is now "Available" with a timer at 00:19.
- Below the status, there is a numeric keypad for entering a number.
- At the bottom, there is a green "Manual dial settings" button.