

RingCentral Video Pro+ For Salesforce

[For version 6.11.1 and above]

Administrator & User Guide

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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.

Requirements

Salesforce Edition:

- Professional, Enterprise, Unlimited

Other System Requirements:

- RingCentral Video Pro+
- 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)
- .Net Framework 3.5

About this Guide

This Guide provides details of the features available for Video Pro+ users within Salesforce.

For **Administrators**, follow the details in the [Lightning](#) or [Classic](#) admin guide for step-by-step instructions for installing and configuring the RingCentral for Salesforce Application

Important Note for Salesforce Administrators: If you wish to only enable managing meeting using Salesforce Global actions, ensure the steps listed under the section “Enabling RingCentral Video Meetings through Global Action” in the admin guide is completed.

If you do not wish to use a CTI adapter for managing meetings enabling Salesforce Global actions is sufficient. You DO NOT need to assign the CTI applications to all users.

Key Features

RingCentral Video Pro+ Salesforce App enables empowers users to effectively manage their meetings within Salesforce. Users can

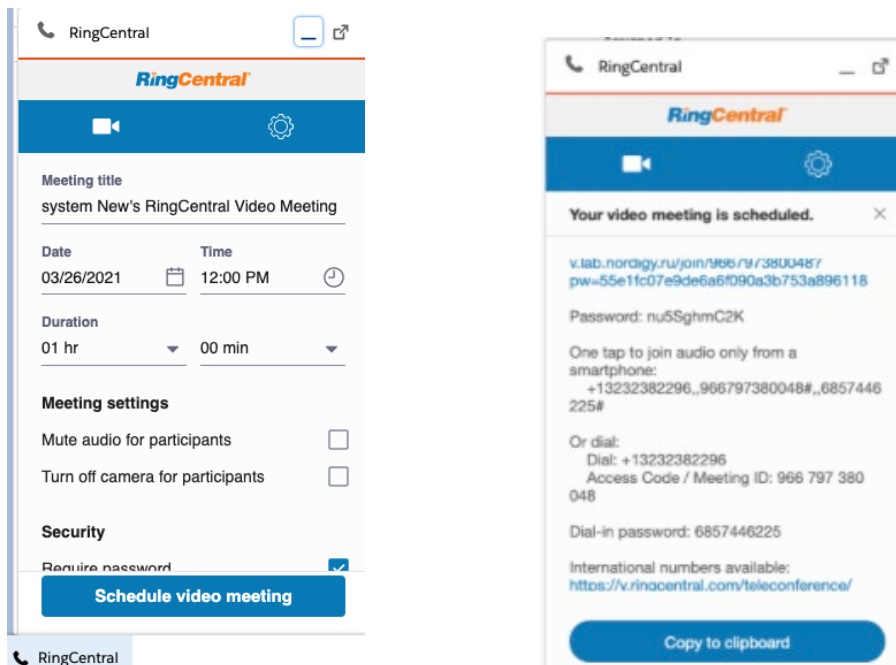
- Schedule a meeting from the RingCentral Application in Salesforce
- Schedule meeting from Salesforce Global Actions

- Start Instant Meeting from Salesforce Global Actions
- Access the Meetings details logged as Salesforce Event

Scheduling a RingCentral Video Meeting

RingCentral Video meetings can be scheduled in 2 convenient ways based on the preference of the users

Schedule meetings from RingCentral Adapter in Salesforce



Users can schedule meeting from the RingCentral App in Salesforce from the Meetings menu. Enter the details of the meeting including the title, date, duration and other meeting settings from right within Salesforce.

On clicking the “Schedule video meeting” button an Event in Salesforce will be created with the details of the meeting including the meeting link.

User can also copy the meeting details into clipboard to send out an email invite from various email applications.

Schedule meetings from Salesforce Global Actions

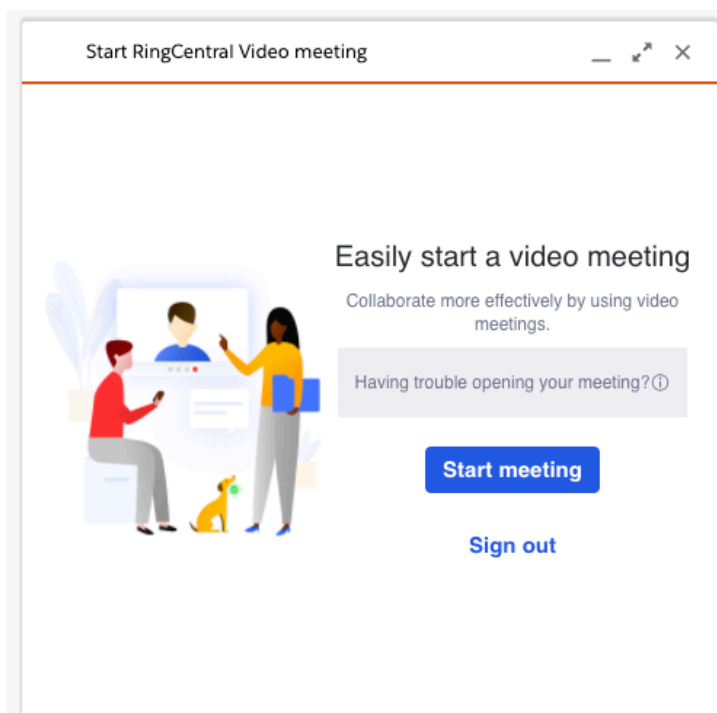
Meetings can be scheduled from Salesforce Global actions by clicking on the schedule meeting icon from the Salesforce Global actions.

The image shows a Salesforce interface with a 'GLOBAL ACTIONS' dropdown menu open. The menu items are: Start RingCentral..., Schedule RingCentral..., New Event, New Contact, New Opportunity, New Case, New Lead, and Email. Below the menu, two windows are shown side-by-side. The left window is titled 'Schedule RingCentral Video meeting' and contains a form with the following fields: Meeting title (system New's RingCentral Video Meeting), Date (03/30/2021), Time (11:00 AM), Duration (01 hr), and 00 min. There are also fields for Name, Related to, and Description, and a 'Schedule' button at the bottom right. The right window is also titled 'Schedule RingCentral Video meeting' and displays the meeting details: system New's RingCentral Video Meeting, a join link (https://xmnup-rxe-1-v.lab.nordigy.ru/join/500879231...), Date/Time (03/30/2021, 11:00 AM, 1 hr), Meeting ID (500879231156), and Meeting password (ENf9HUDUtr). It includes buttons for 'Copy meeting info', 'View meeting details', and 'Sign out'.

Starting an instant RingCentral Video Meeting

Users can start an instant RingCentral Video meeting from Salesforce Global actions. From the global actions menu in Salesforce click on “Start RingCentral Video meeting”.

This will enable users to start an RingCentral video meeting instantly from Salesforce.



Clicking on the “Start meeting” button will open up a new tab and let the user manage the meeting either through the RingCentral desktop App or through browser.