

RingCentral for Oracle Sales

User Guide

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Introduction

About RingCentral for Oracle Sales

RingCentral for Oracle Sales provides seamless integration between Oracle Sales.com and your RingCentral services to enable improved customer retention, greater agent productivity, and advanced business processes.

It offers these features:

- **No software to install** - works entirely in the cloud with any RingCentral device
- **Works on any computer, any browser** – Access anytime on any PC or Mac
- **Easy click-to-dial** by clicking on any phone number in Oracle Sales
- **Instant screen pop** displaying the caller's information as soon as a call arrives
- **Call dispositions** for quick call logging
- **Accurate call logs** saved to the corresponding record
- **New records** – Accounts, Contacts, Leads can be easily created while on call

About this Guide

This guide is specifically designed for end users of RingCentral for Oracle Sales. 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 Oracle Sales.com 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.

Basics

For optimal user experience, ensure that:

1. The browser you are using is updated to the latest version.
2. You have set the correct number as your RingCentral Direct Number – you will be making and receiving calls from this number through the Oracle Sales.com interface.

You can find your RingCentral Direct Number in the RingCentral Service Portal at **My Settings > Phones and Numbers > Direct Numbers**.

3. Login to Oracle Sales.com through the browser; the App will work only while the user is logged in to Oracle Sales.com.
4. Login to RingCentral for Oracle Sales through Oracle Sales.com. Use your RingCentral Direct Number for the user name and your RingCentral password.
5. Click the **Save** button to save your settings. These settings are cleared when the user logs out from RingCentral for Oracle Sales, but will persist if the user logs out from Oracle Sales instance without logging out from the application and had also selected the option **Remember Me** on the login screen while logging in.

Login

Open your browser and login to your RingCentral for Oracle Sales account with your user name and your password. (Figure 1)

Once logged in, you will see the **Welcome** screen, as shown in Figure 2.



Figure 1

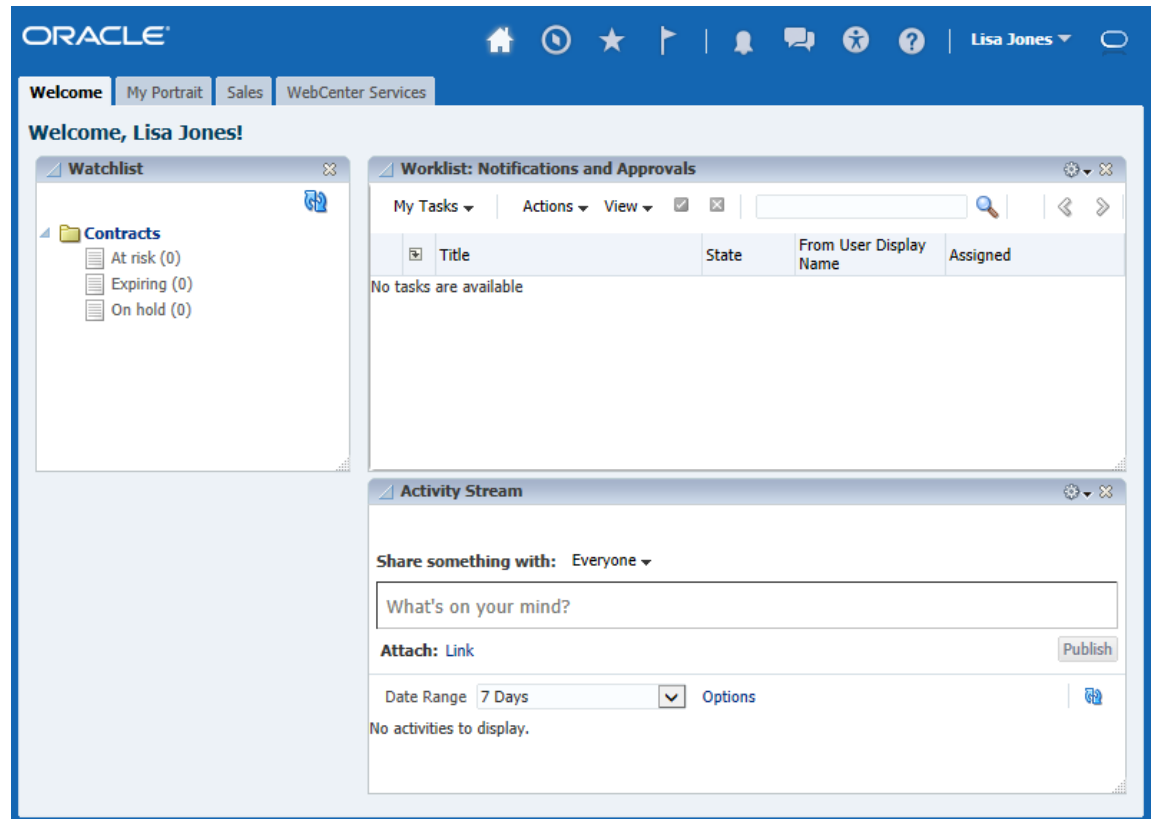


Figure 2

Navigator

On the **Welcome** screen, click the Navigator icon 

On the **Navigator** pop-up panel, click **Customers**.
(Figure 3)

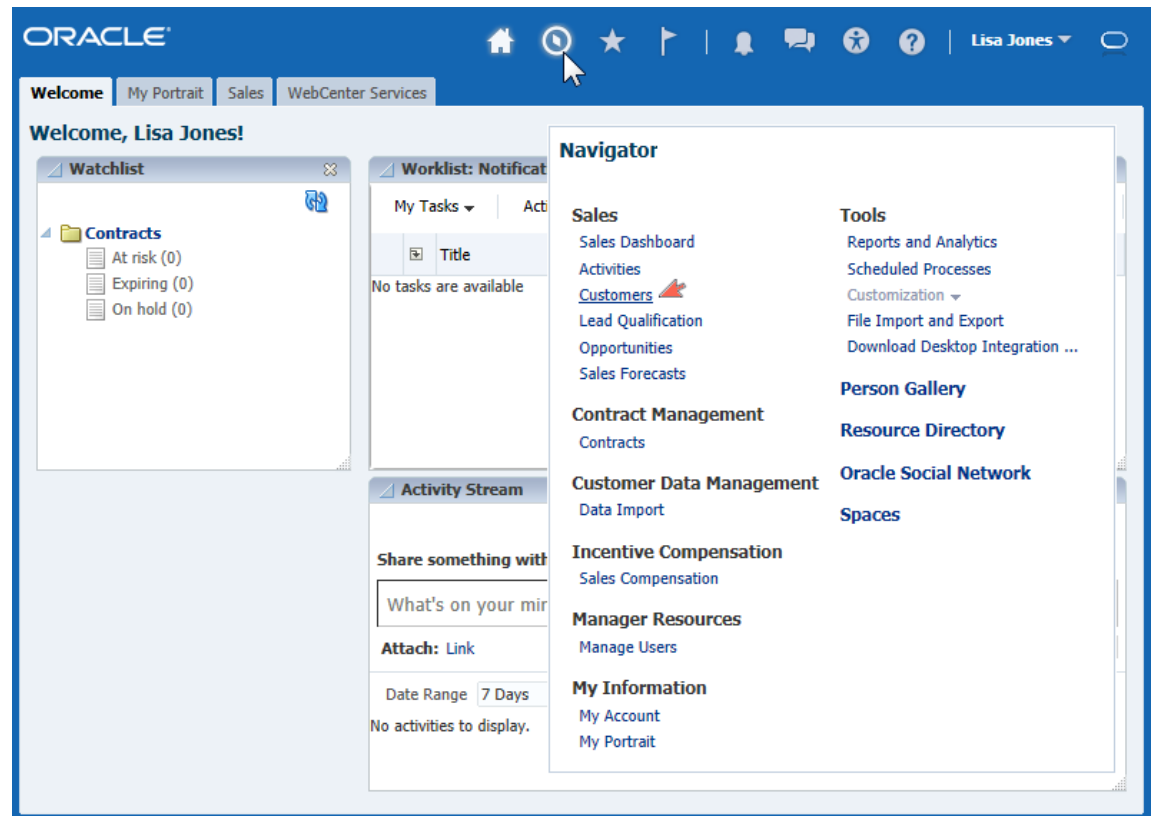



Figure 3

Customer Screen

Once you are on **Customers** screen, you will see the connector icon  with a status of “Not Connected”.
(Figure 4)

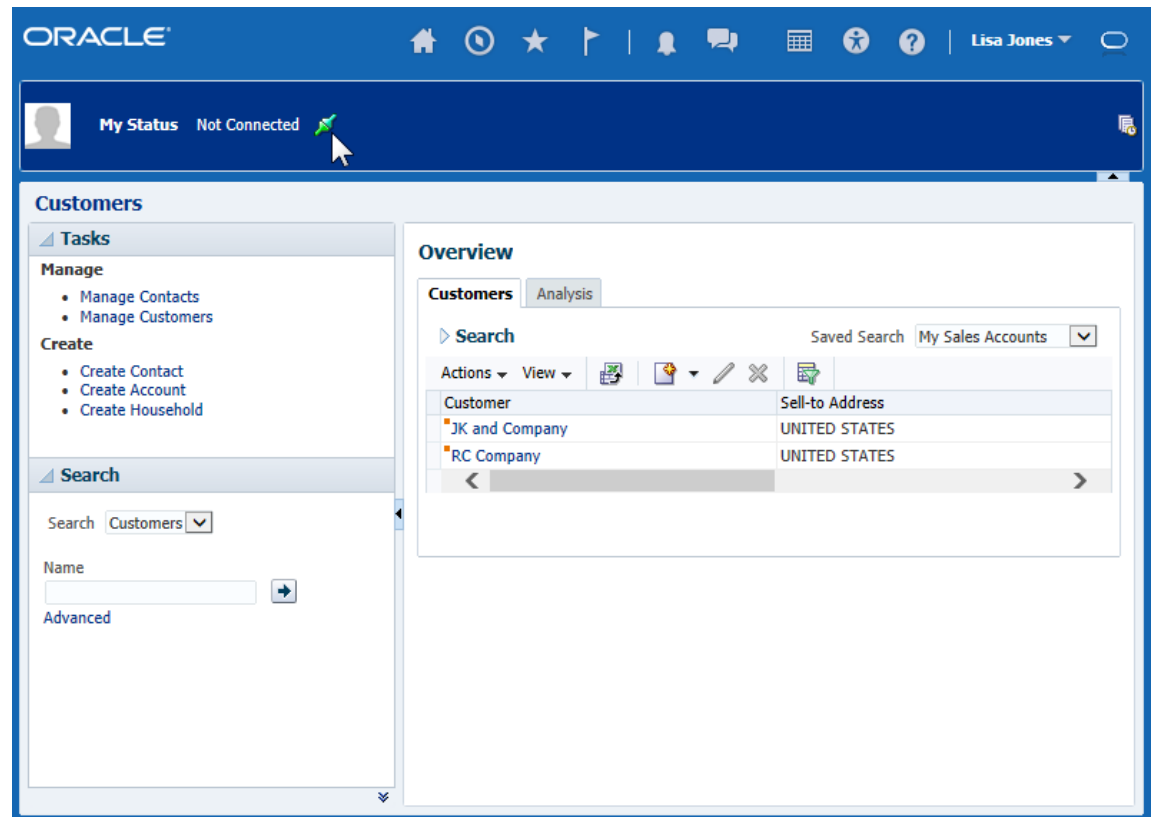


Figure 4

Connect

After you click on the connector icon it will prompt for credentials. Enter your RingCentral user ID and password. Leave the Agent Group blank. Click **OK**. (Figure 5)

After you are successfully logged in, the application status will display as **Available**. (Figure 6)

When you receive a call from a customer, the connector icon changes to indicate the call is ringing. (Figure 7)

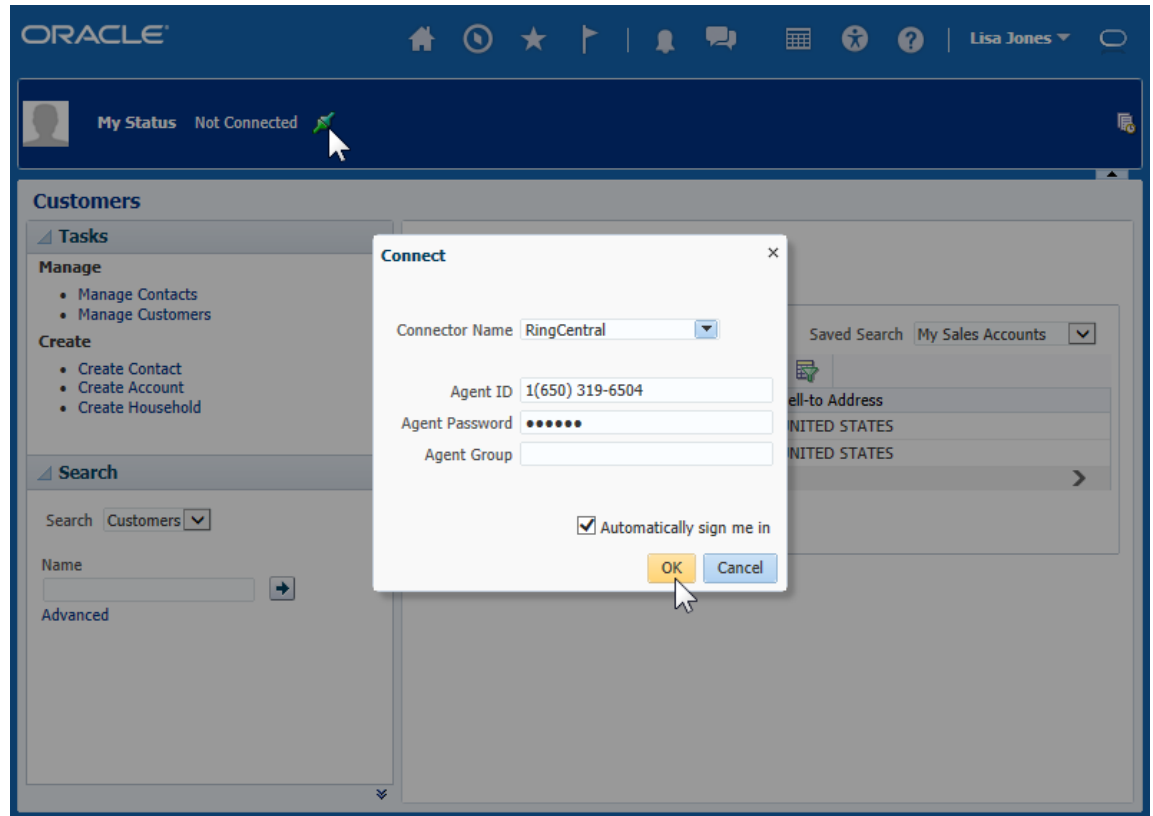


Figure 5

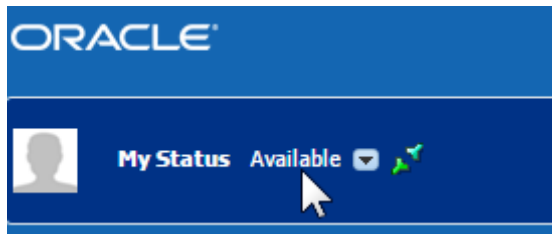


Figure 6



Figure 7

Answering the Customer Call

You can use either the RingCentral Deskphone or the RingCentral Softphone App for Windows[®] or Softphone App for Mac[®] to answer the call.

(Figure 8 and Figure 9)



Figure 8

Once you end the call, Oracle Sales will provide a **Wrap Up Task** opportunity for the call.

(Figure 10)

Wrap Up Task [Close]

Description [Text Input]

Outcome [Dropdown]

[Submit and End Wrap Up] [Save and Close] [Cancel]

Figure 10

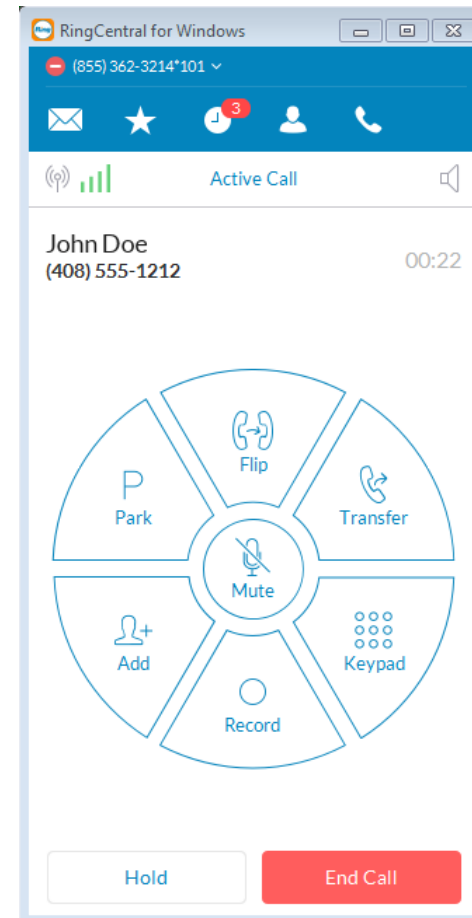


Figure 9

Troubleshooting

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

A: No, RingCentral for Oracle Sales does not require any special permissions and it should work for all user profiles. Please ask your Oracle Sales 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 Oracle Sales.

Q: Can I use RingCentral for Oracle Sales across multiple Oracle Sales.com instances (or "orgs")?

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

Q: Can I use RingCentral for Oracle Sales across multiple browsers (Internet Explorer and Firefox, for example)?

A: RingCentral for Oracle Sales 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 Oracle Sales.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 Oracle Sales, but the click-to-call icon is not displayed.

A: It may be due to some customizations made for your Oracle Sales account. Please contact your Oracle Sales Administrator.

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

A: You will have to request that your Oracle Sales Administrator remove you from the Call Center profile list.

Q: Search results are not displaying records that match the caller ID.

A: Check the format of the phone number in Oracle Sales. Ensure the format is standardized per Oracle Sales features.

Q: Which Operating Systems are supported?

A: The following Operating Systems are supported:

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

Q: Which browsers are supported?

A: RingCentral for Oracle Sales supports the following browsers:

- Internet Explorer 10, 11 + (Windows)
- Firefox 25 + (Windows, Mac)
- Chrome 30 + (Windows, Mac)
- Safari 6.0.5+ (Mac)

