

RingCentral for ServiceNow

User Guide

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Introduction

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

About this Guide

This guide is designed for ServiceNow users after RingCentral for ServiceNow has been 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 ServiceNow instance to be able to use this application. This user guide will show you how to use this application.

About ServiceNow

ServiceNow connects people, workflow, and processes to engage across departments in case management and resolution. It improves efficiency with automation that gives agents visibility into the health of customer systems, and provides tools for performing root cause analyses in order to deliver preemptive service. The result is customer service that is effortless, connected, and proactive.

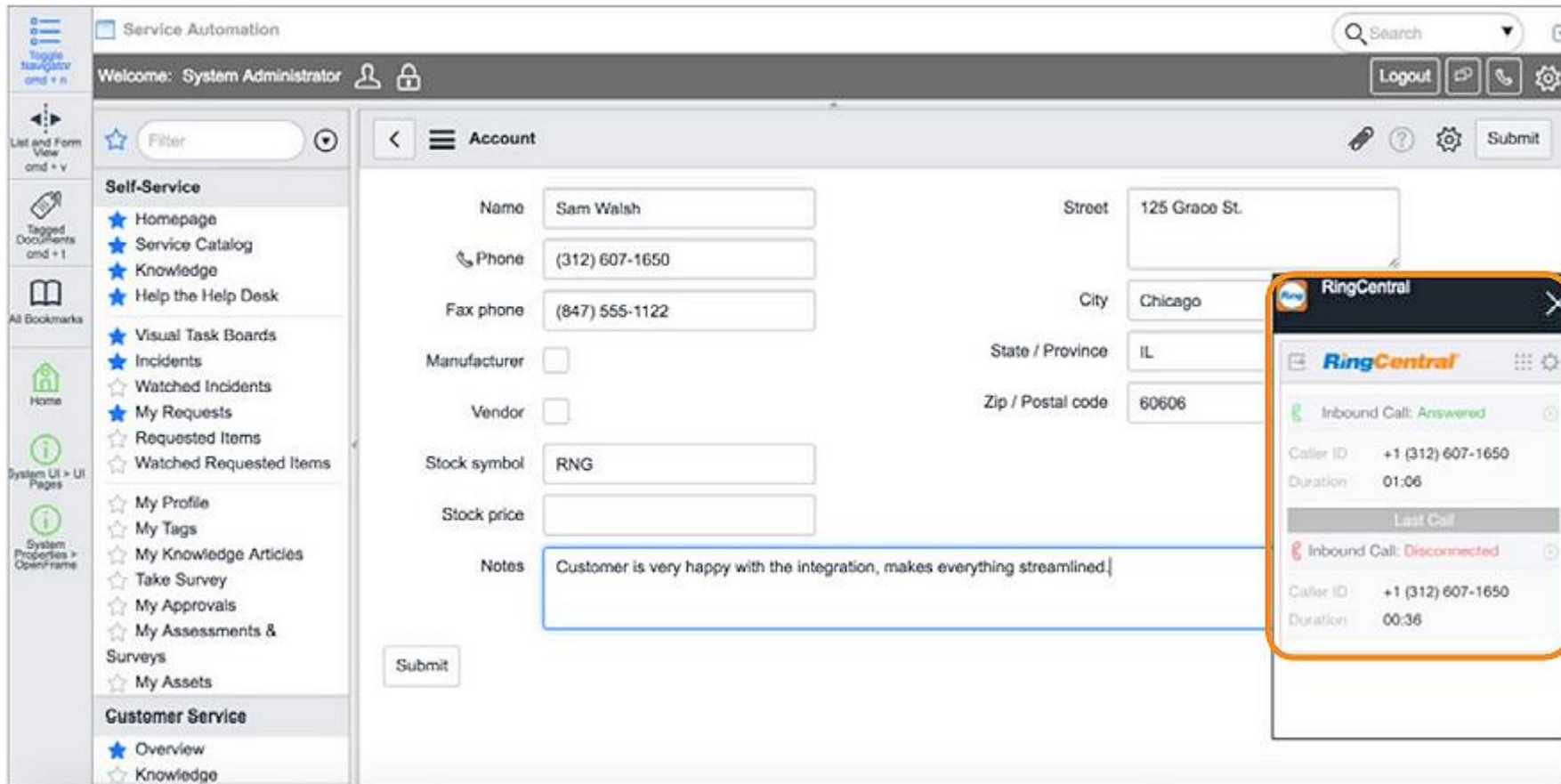
About RingCentral for ServiceNow

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

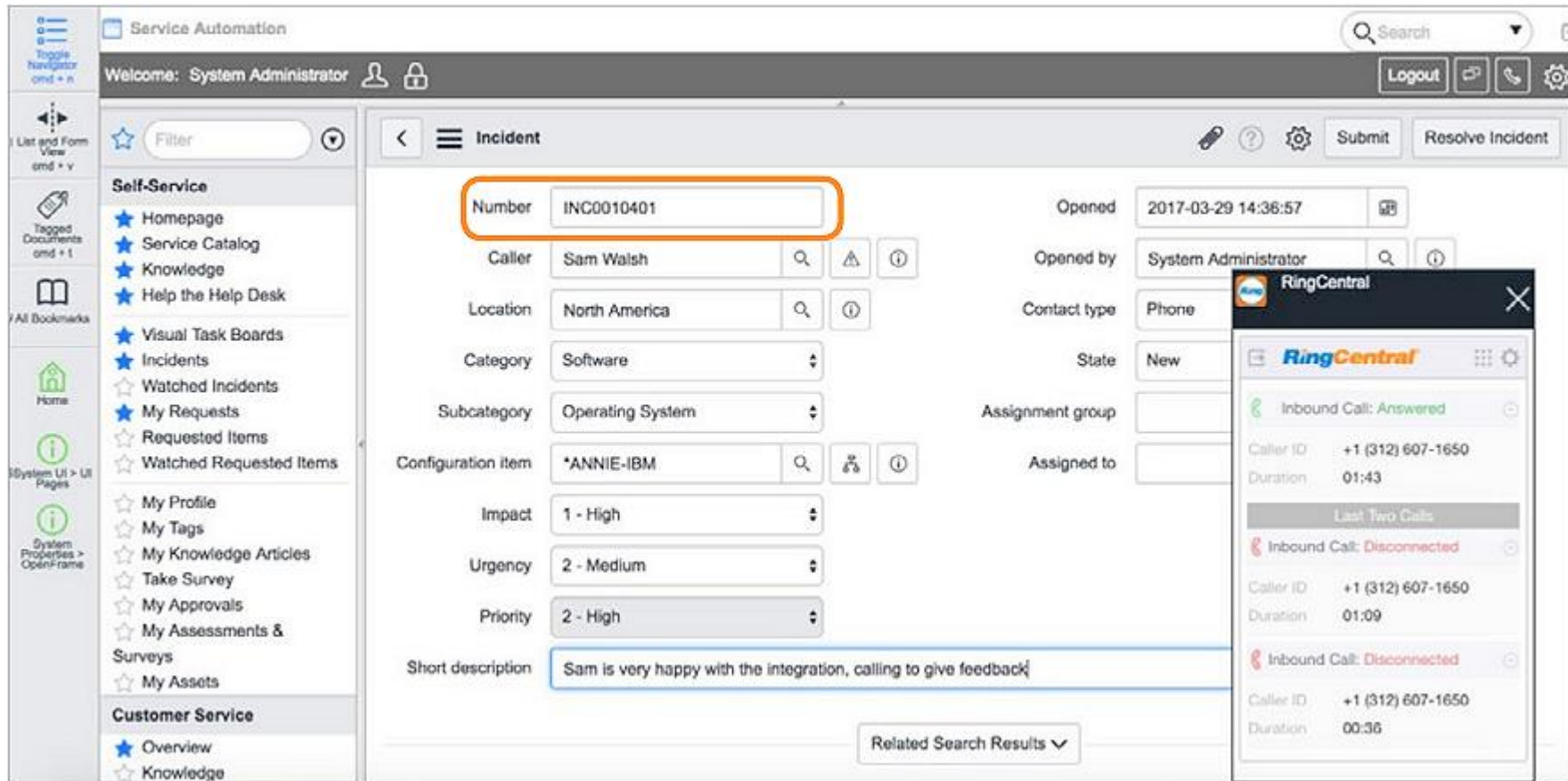
Features and Benefits

- Receive calls without leaving the ServiceNow application.
- Instantly display an incoming caller's record or search result when a matched caller ID is found.
- See a matched record and quickly log calls within one interface.
- Flexible options to meet users' needs when handling a new incoming number—create a new customer record, new incident, or no action.
- Click to dial phone numbers from any ServiceNow account or customer to enhance productivity.
- Easy report generation for historical call logs.
- Seamless integration lets you make calls with any preferred device: Desk phone, softphone, or mobile.

How it Works



With an inbound call, if there is no caller ID match, RingCentral for ServiceNow will automatically create a new user and incident.



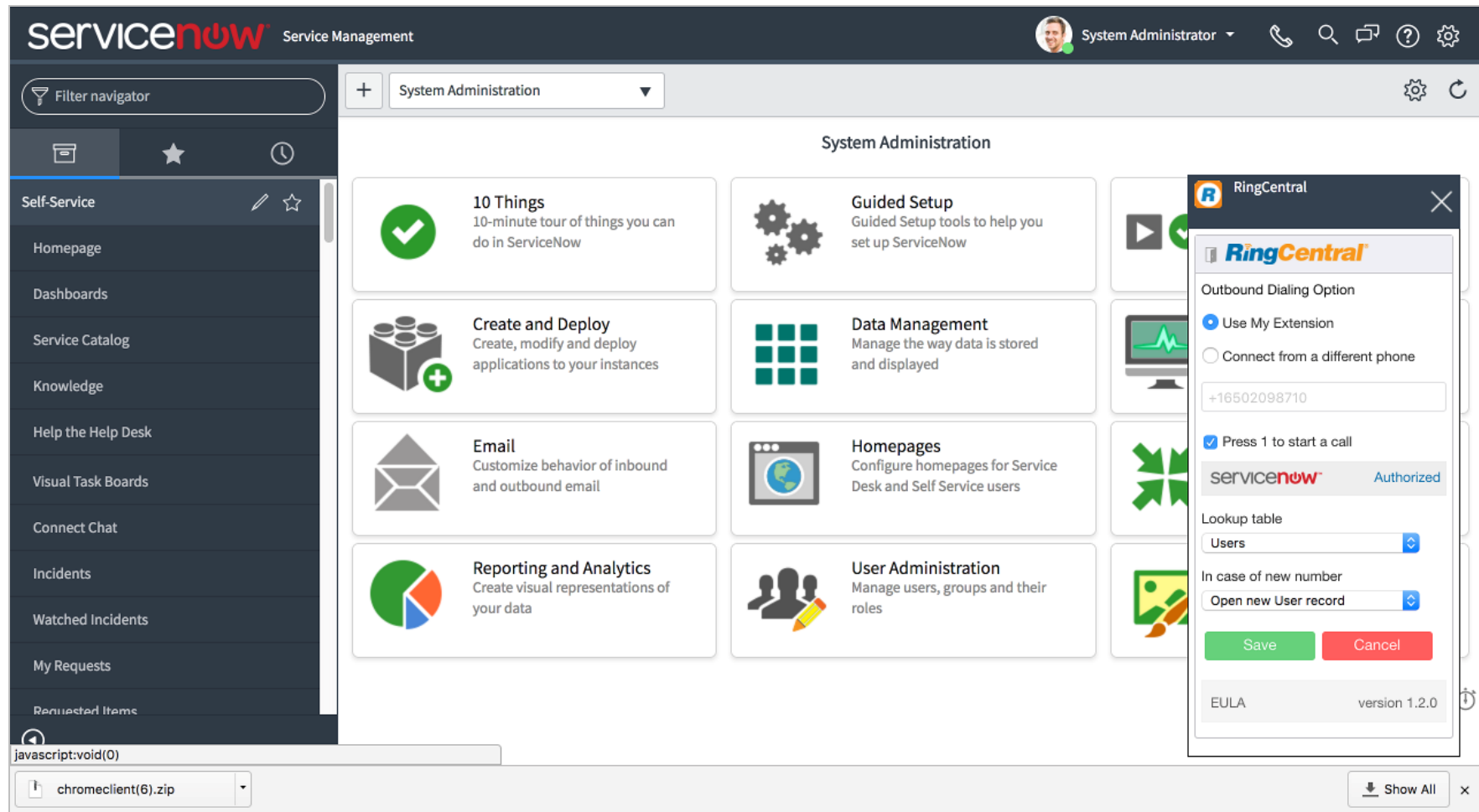
With a new or existing phone number, RingCentral for ServiceNow will automatically create a new incident based on caller ID match.

The screenshot displays the ServiceNow user interface. The main content area features a pie chart titled "Users by Location" with a legend below it. The legend data is as follows:

Location	Count	Percentage
(empty)	64	10.34%
27, Boulevard Vitton, Paris	63	10.18%
3 Whitehall Court, London	48	7.75%
Paradise Road, Richmond, London	39	6.3%
22 M... ..	22	3.55%

Below the pie chart, there is a navigation menu on the left with categories like "Self-Service" and "Customer Service". On the right side, a RingCentral integration window is open, showing settings for "Outbound Dialing Option". The "Press 1 to start a call" option is checked. A "Lookup Table" dropdown menu is open, showing options: "Customer", "Open new Incident record", "Open new Customer record", and "Do nothing". The "Do nothing" option is selected and highlighted with an orange border.

Edit your ServiceNow phone settings utilizing the RingCentral for ServiceNow integration.



Click authorize to allow RingCentral for ServiceNow to fetch your ServiceNow data by making API calls.