RingCentral for Salesforce Classic

Administrator Guide

Contents

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.

About this Guide

This guide is specifically designed for System Administrators of the Salesforce.com application. This guide is not intended for end users and does not provide any information on how to use the application or any related information. This Administrator guide will show you how to set up your Salesforce.com instance to enable your users to use RingCentral for Salesforce within their Salesforce.com interface.

Installation and Setting up the Call Center

Step 1: Install RingCentral for Salesforce

Install the RingCentral for Salesforce package from the AppExchange here. Click “Get It Now” to start the installation. Installation of this application requires an administrator login to Salesforce.com. See Figures 1 – 7.

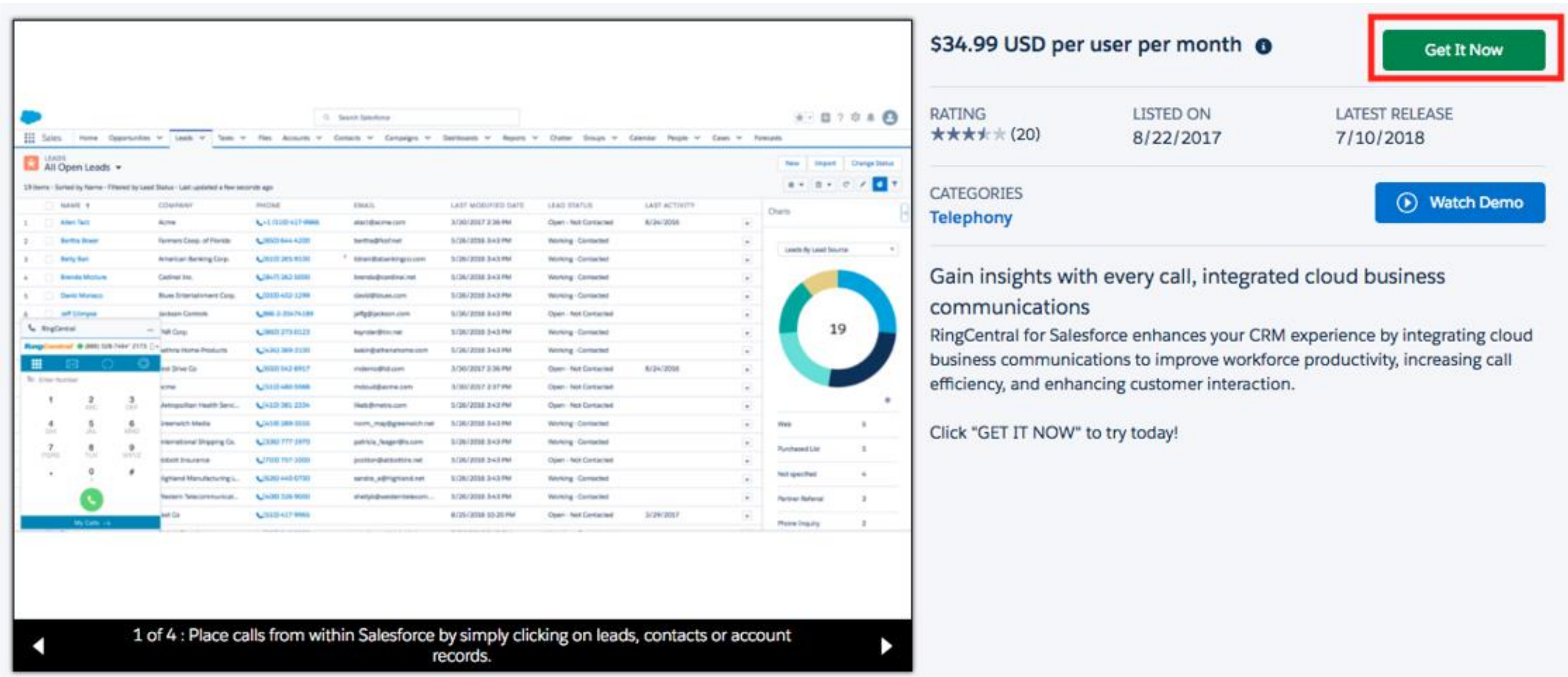

Figure 1

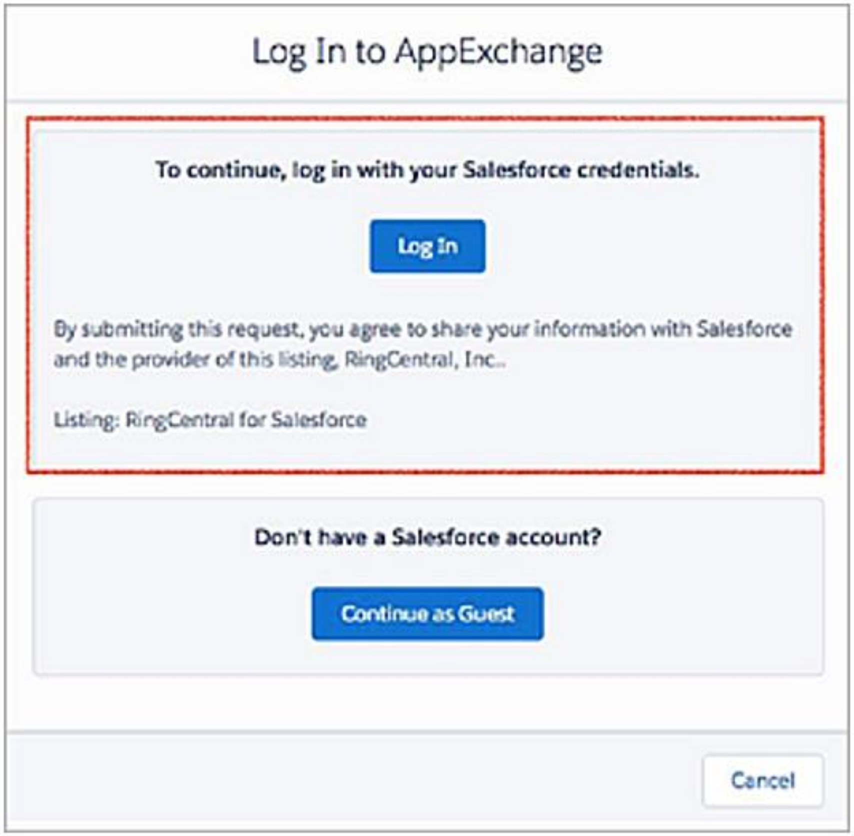

Figure 2

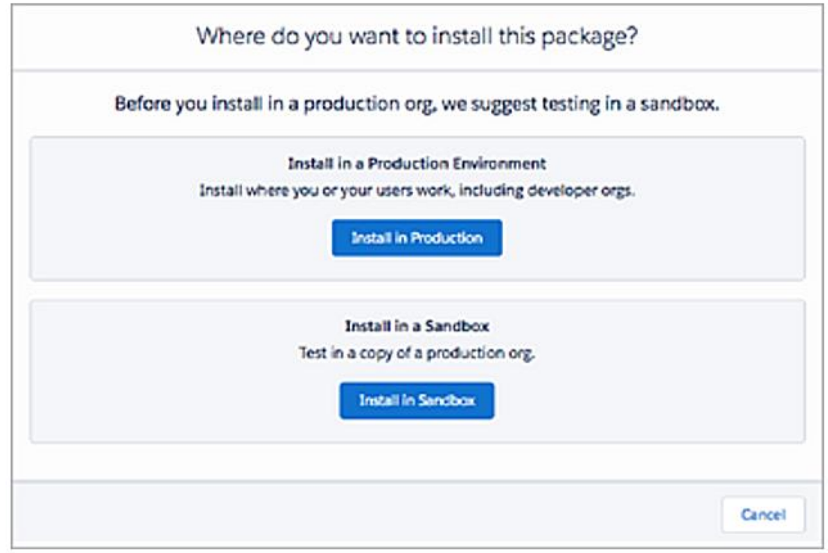

Figure 3

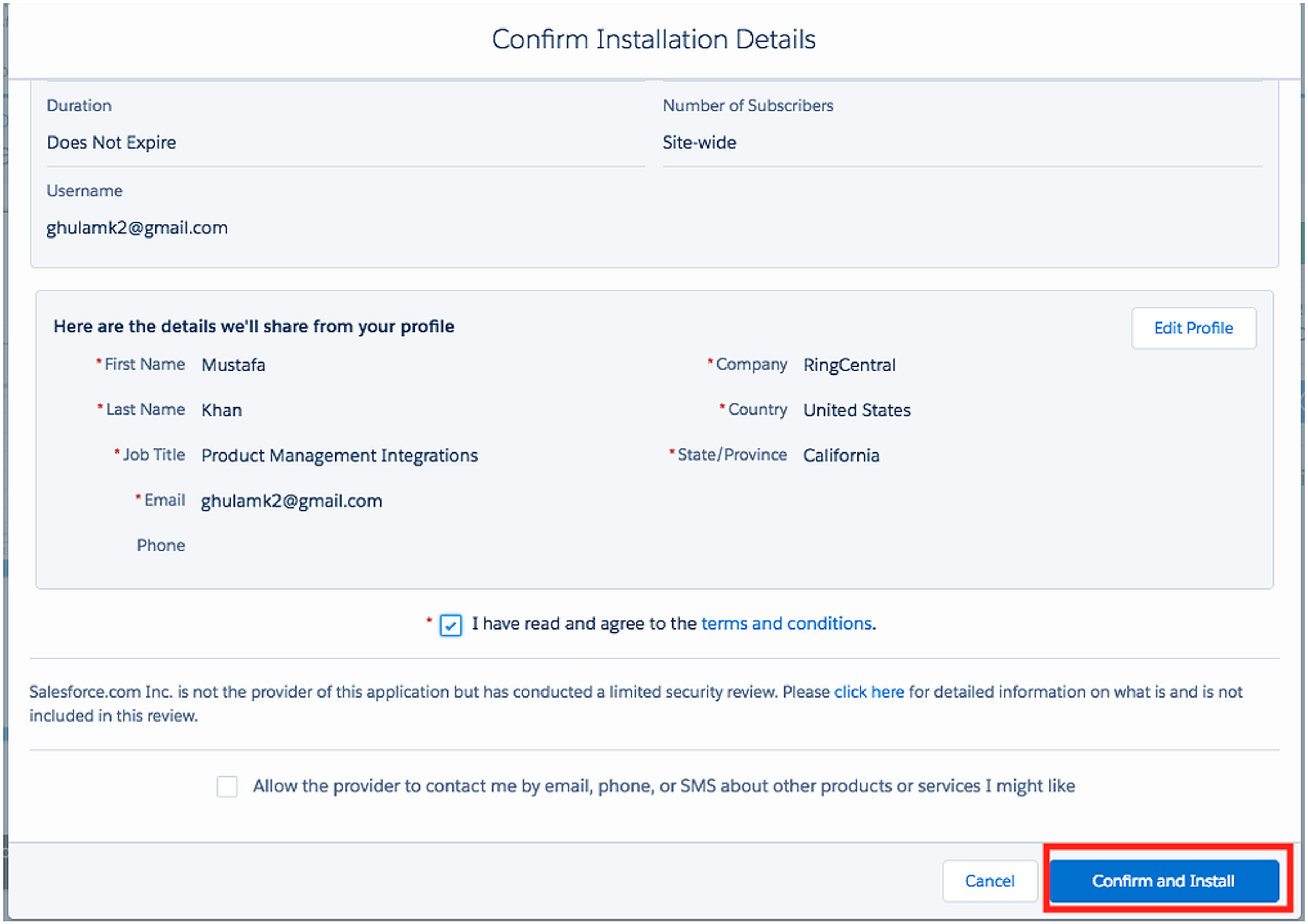
Confirm Installation Details
Duration
Does Not Expire
Number of Subscribers
Site-wide
Username
ghulamk2@gmail.com
Here are the details we'll share from your profile
Edit Profile
* First Name Mustafa
* Company RingCentral
* Last Name Khan
* Country United States
* Job Title Product Management Integrations
* State/Province California
* Email ghulamk2@gmail.com
Phone
* I have read and agree to the terms and conditions.
Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please click here for detailed information on what is and is not included in this review.
Allow the provider to contact me by email, phone, or SMS about other products or services I might like
Cancel
Confirm and Install

Figure 4

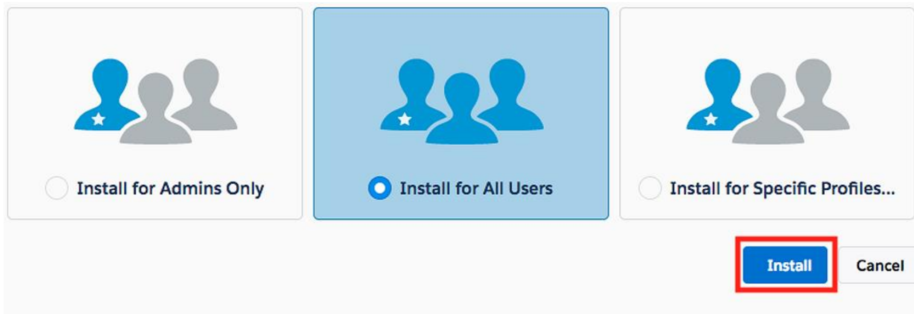

Figure 5

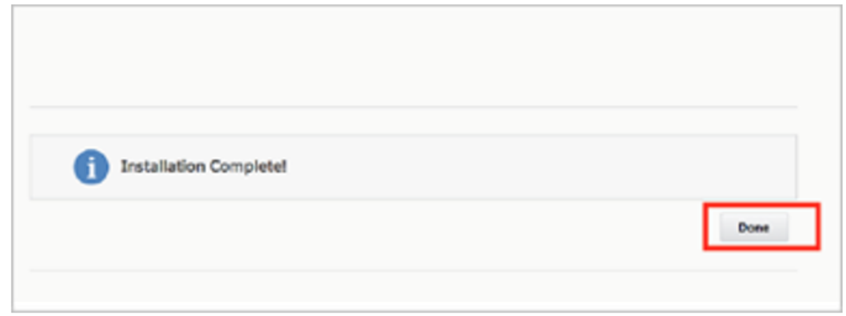

Figure 6

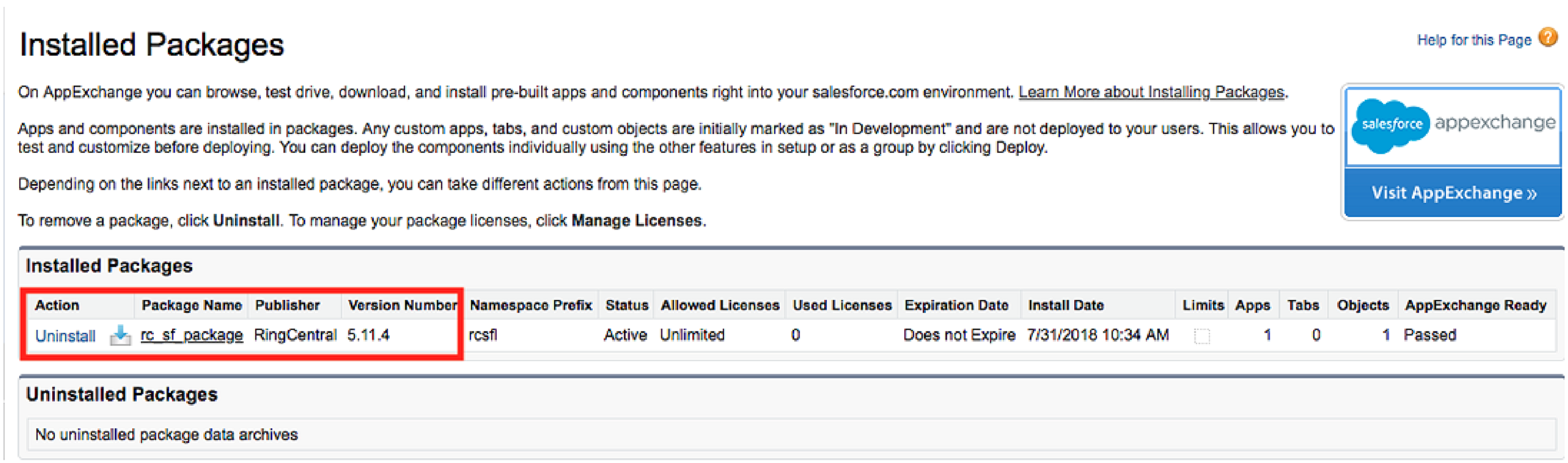

Figure 7

Step 2: Configure the Call Center

Go to **Setup > Visualforce Pages** and click the **Preview** icon next to the OpenCTIIndex999 page. (Figure 8)

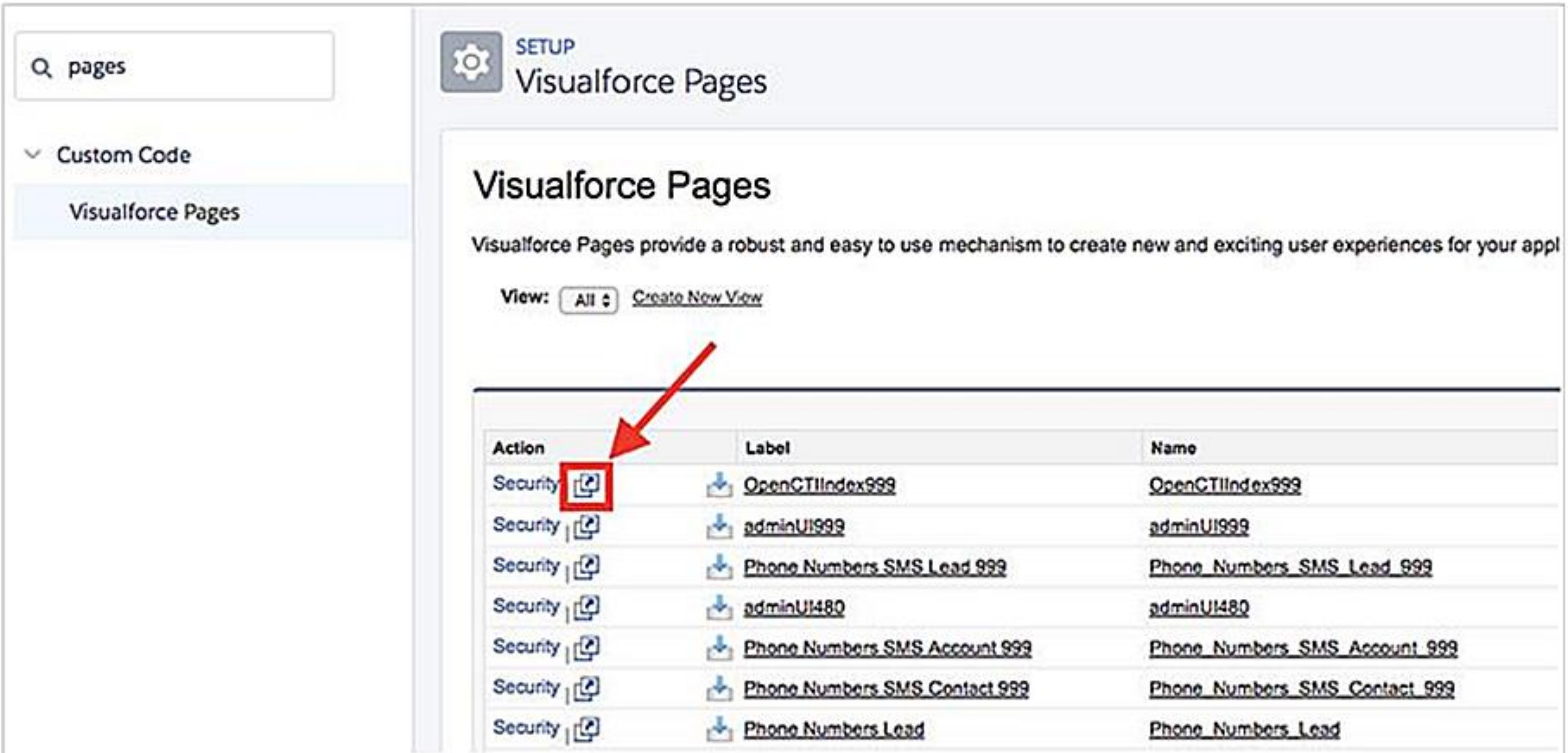

Figure 8

After the page opens in a new tab or window, copy its URL (until # symbol). For example, if the full URL is https://redabacus-dev-ed--rcsfl.na30.visual.force.com/apex/OpenCTIIndex999#/dialer, you should take https://redabacus-dev-ed--rcsfl.na30.visual.force.com/apex/OpenCTIIndex999 from here. (Figure 8A)

Go to **Setup Home > Call Centers**, select the call center **Cloud Phone App** and click **Edit**. (Figure 8B) Paste the URL from OpenCTIIndex999 page to CTI Adapter URL; then click **Save**. (Figure 8C)

The above is an example of a Salesforce Org where a custom URL redabacus-dev-ed is set. In case you are not using a custom URL, follow the same steps and make sure the Salesforce POD# in the Call Center URL, na30 in this example, matches with Call Center where Salesforce Org resides. Your Salesforce POD# is specified in the browser address bar after you login to Salesforce. (Figure 2A)

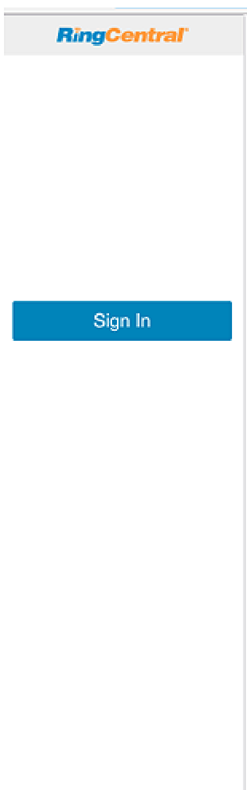

Figure 8A

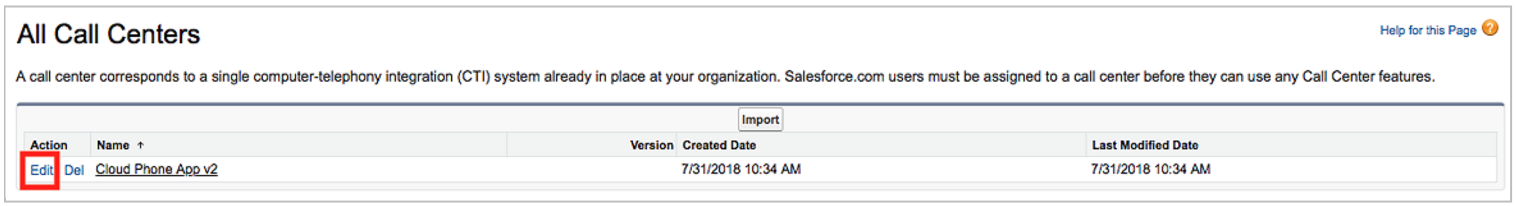

Figure 8B

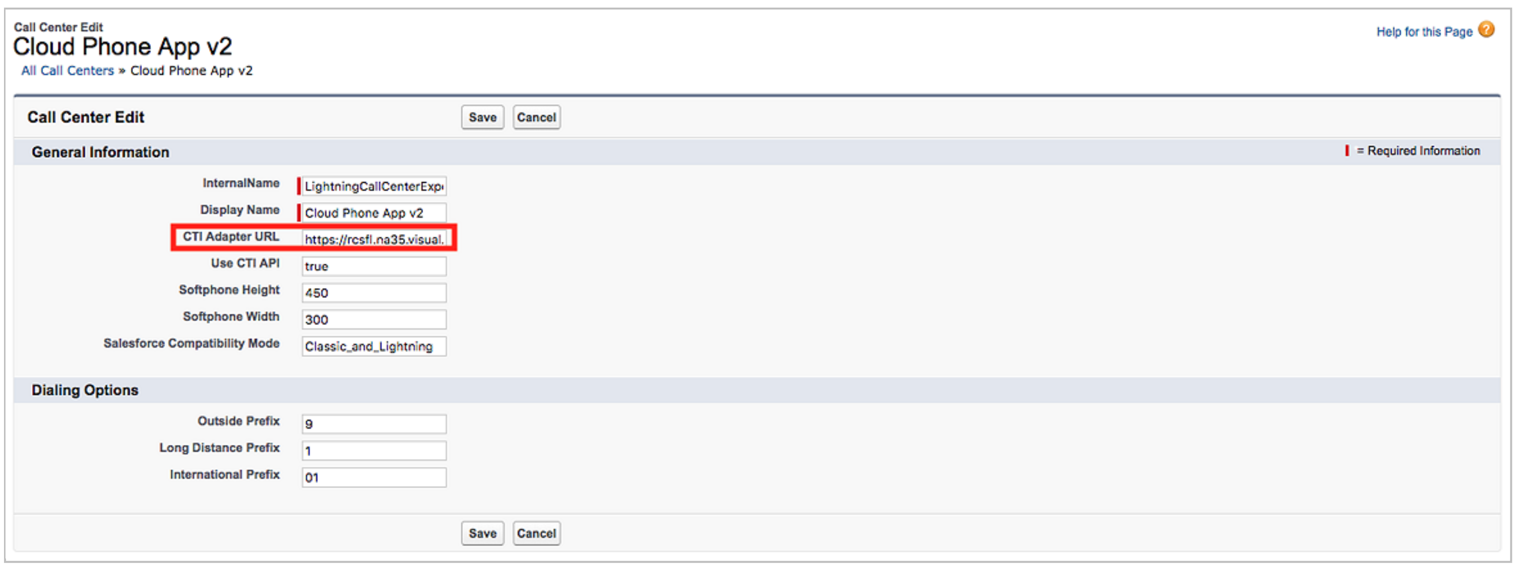

Figure 8C

Step 3: Add Users to the Call Center

From here, you can add users to this Call Center using the Manage Call Center Users button, which opens the Manage Users screen (Figure 9). Note: If your users are added to another call center already, please first remove them from that call center before you try to add them in the Cloud Phone App. (Figure 10)

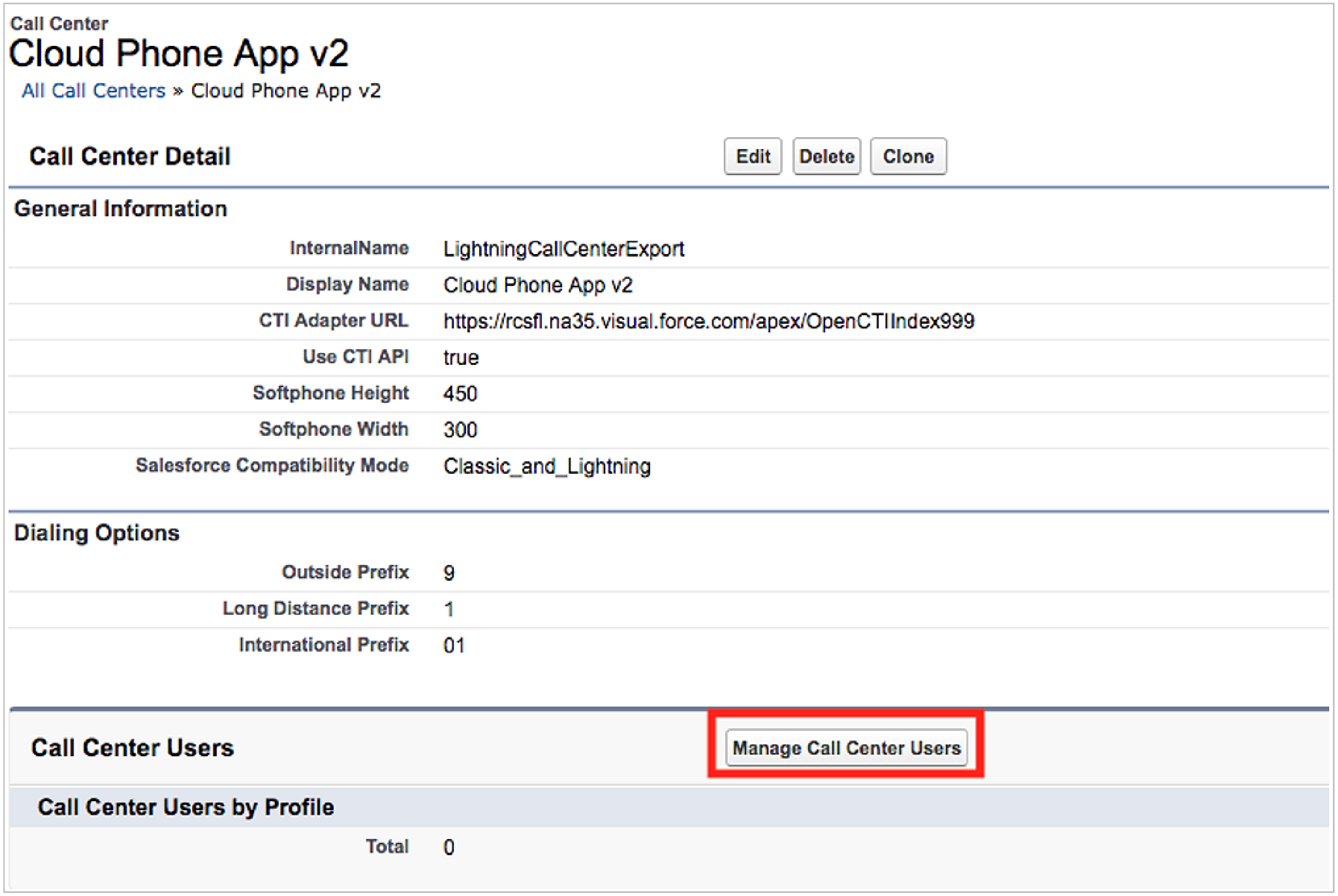

Figure 9

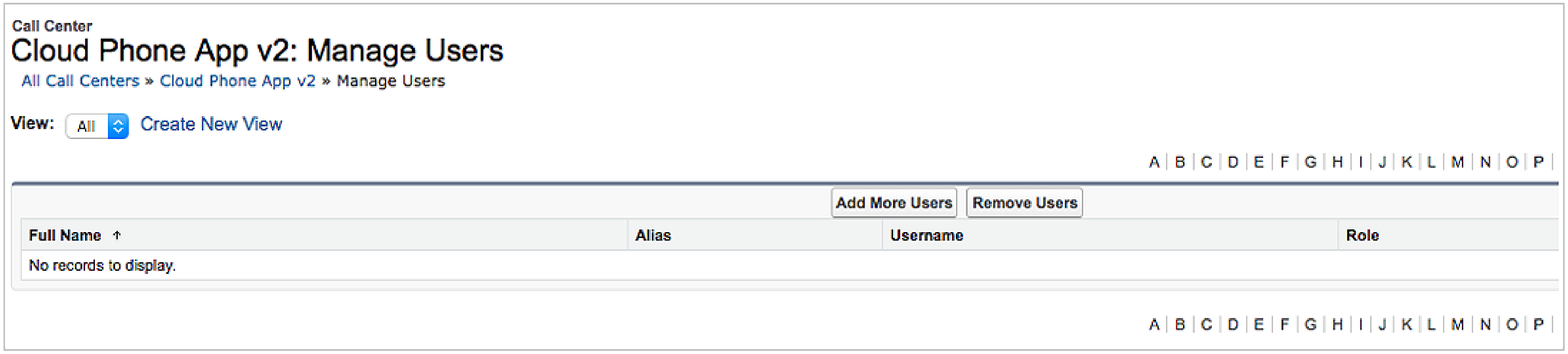
Call Center
Cloud Phone App v2: Manage Users
All Call Centers » Cloud Phone App v2 » Manage Users
View: All
Create New View
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P |
Add More Users
Remove Users
Full Name
Alias
Username
Role
No records to display.
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P |

Figure 10

Setting up Softphone Layouts in Salesforce

Step 1: Set up a Softphone Layout

From the left-hand side menu, go to **Setup > Customize > Call Center > SoftPhone Layouts** and click the **New** button (Figure 11).

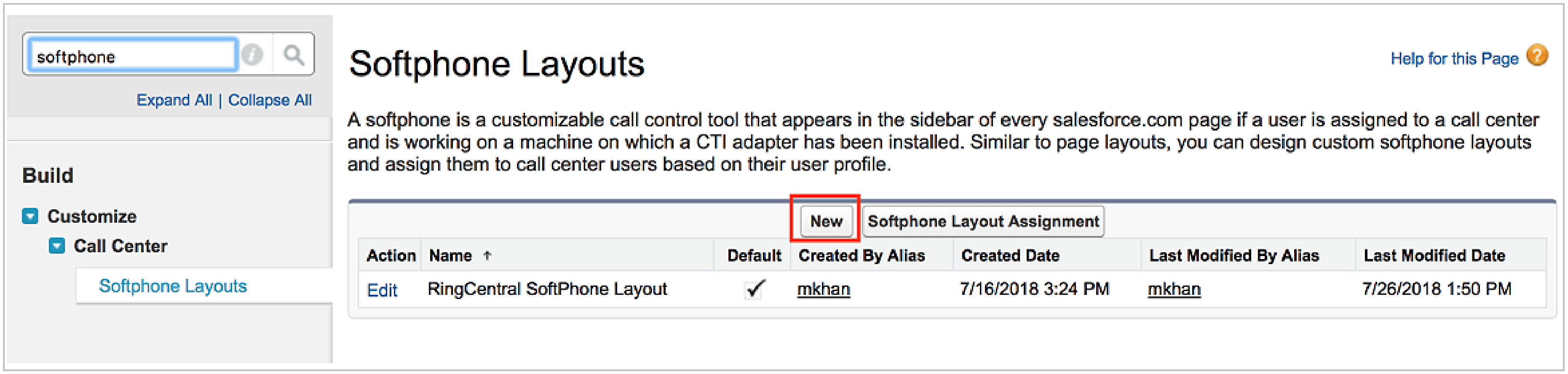

Figure 11

In the **Name** field, fill in “RingCentral SoftPhone Layout” and select the **Is Default Layout** checkbox if you want this layout to be the default for all users (Figure 12).

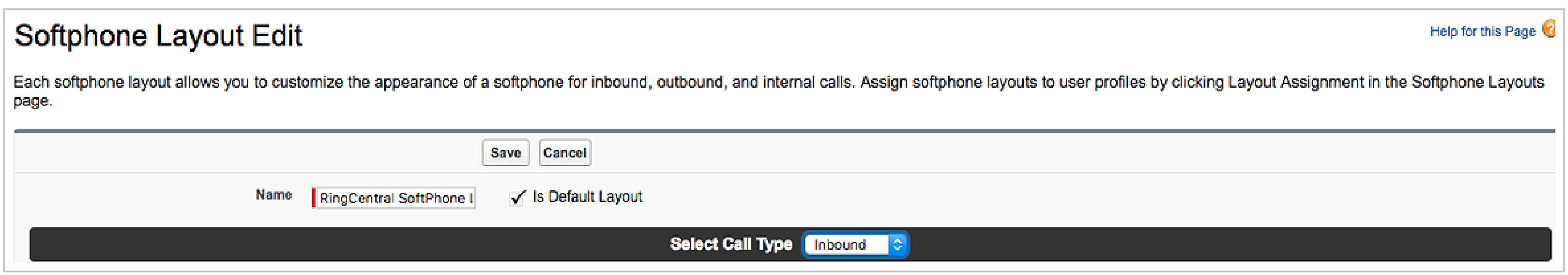

Figure 12

In **Screen Pop Settings** (Figure 13):

- In the first set, **Screen pops open within**, choose whether you'd like screen pops to appear in a new window or to overwrite the existing Salesforce.com window when a new call arrives.
- For the second set, **No matching records**, if you'd like a new record to be created if there's no match on an inbound call, select the **Pop to New** option and from the dropdown select the appropriate object you would like to be created when there is an incoming call from a number which does not match any existing record.
- In the third set, **Single-matching record**, select the **Pop detail page** option.
- In the fourth set, **Multiple-matching records**, select the **Pop to search page**. Now click the **Save** button on the top.

Step 2: Assign the SoftPhone Layout to Users

Go back to the Softphone Layouts page (Figure 11) and click the **Softphone Layout Assignment**.

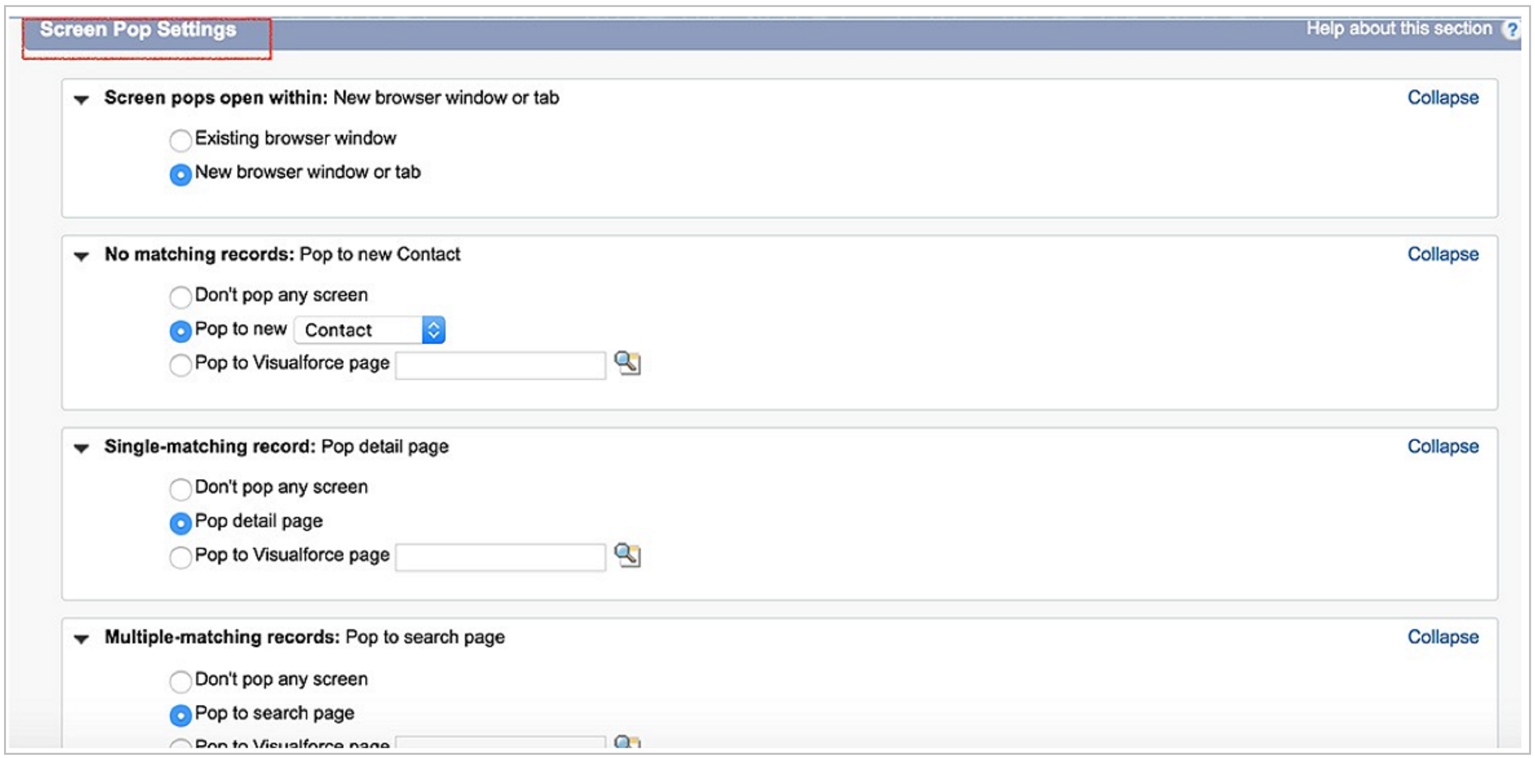

Figure 13

Step 2: Assign the Softphone Layout to Users

Go back to the Softphone Layouts page (Figure 11) and click the **Softphone Layout Assignment**. (Figure 14)

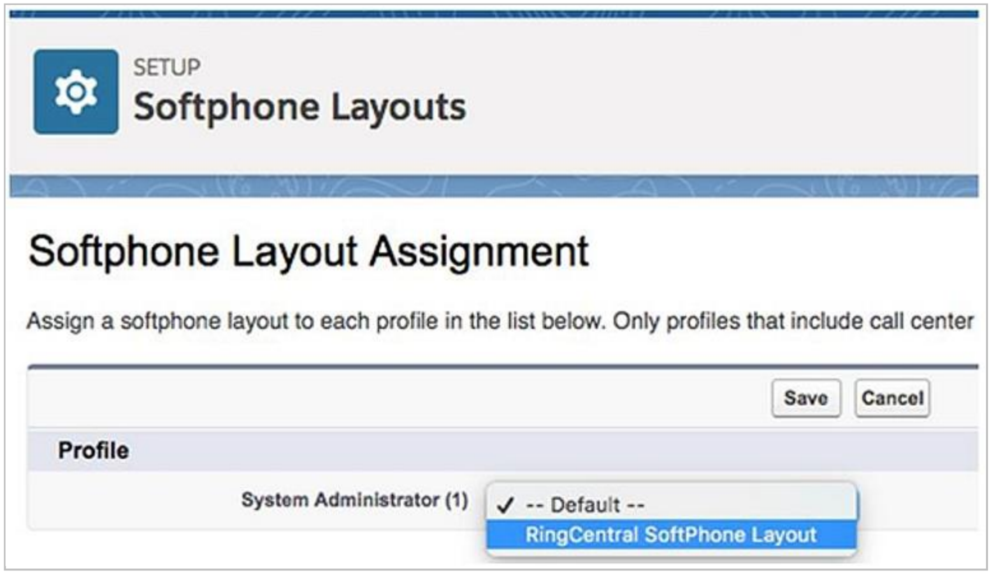

Figure 14

Setting up Preset Call Dispositions

RingCentral for Salesforce includes the capability to provide a list of preset call dispositions to your end users to make logging calls quick and easy. These dispositions appear in a dropdown list under the Subject area of the call log (Figure 15):

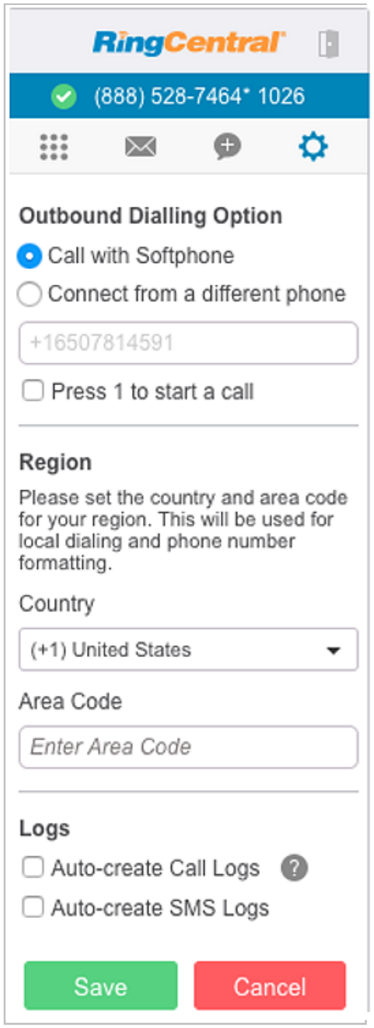

Figure 15

These preset dispositions are gathered from the Subject picklist on the Salesforce.com Task object. To edit these dispositions, navigate to **App Setup > Activities > Task Fields**. On the Task Fields page, click the label of the Subject field, and you'll see a page like this (Figure 16):

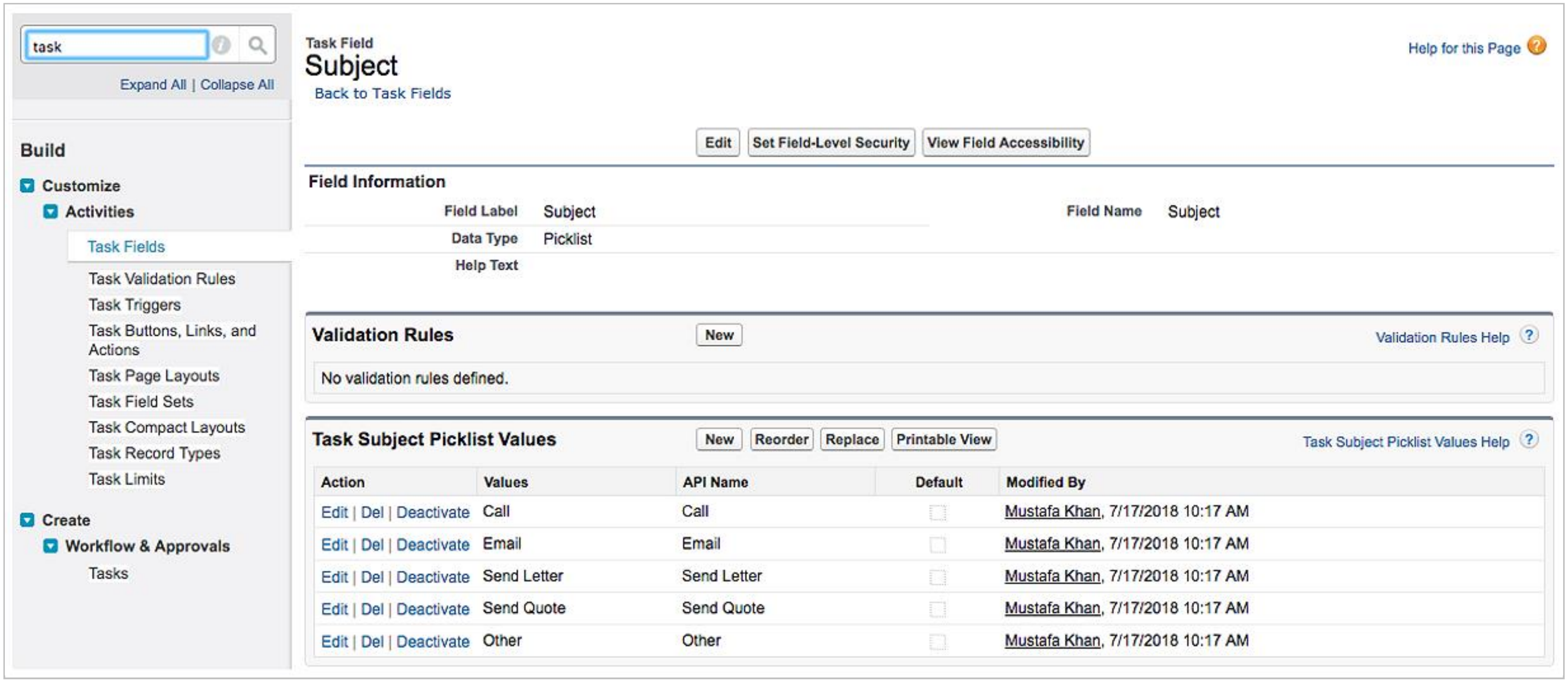

Figure 16

Note: Adding or editing picklist values here will instantly modify the dispositions available to users.

Share Report Folder with Users

To share a report with users, go to All Tabs and click on **Reports** (Figure 17 & 18)

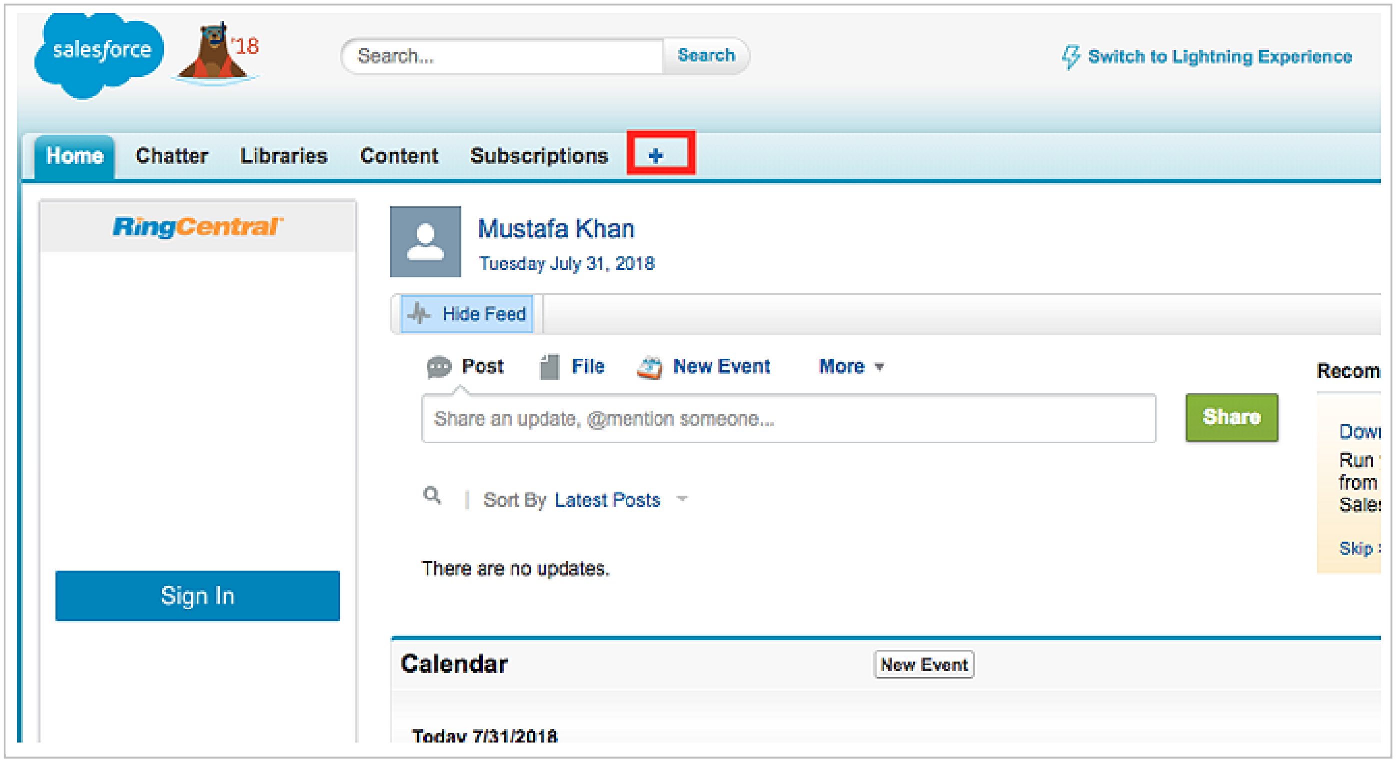

Figure 17

Find the "Cloud Phone Report" folder in the report folders list and click the "pin" icon next to its name. Then select "Share" item. (Figure 19)

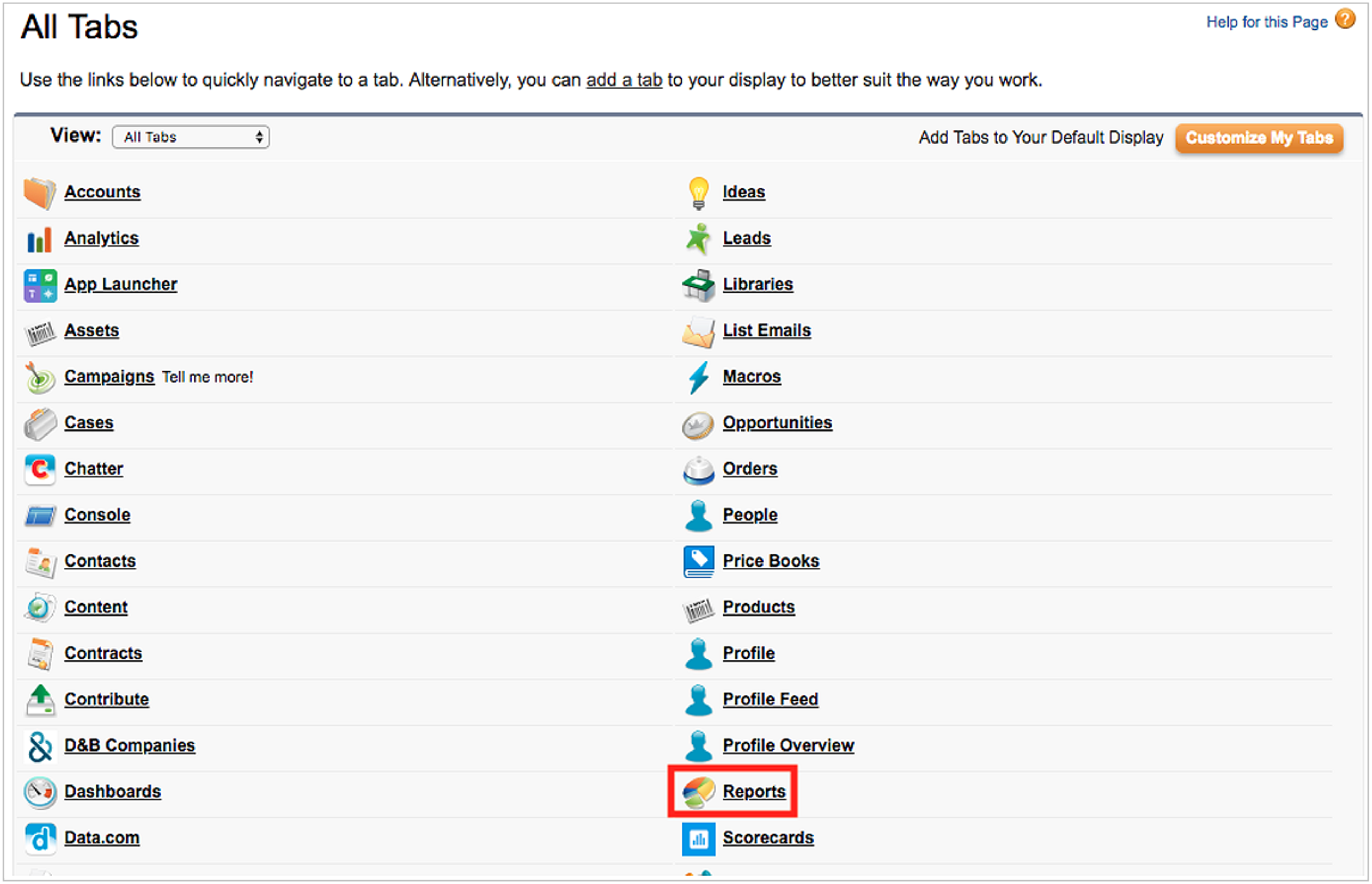
All Tabs
Help for this Page
Use the links below to quickly navigate to a tab. Alternatively, you can add a tab to your display to better suit the way you work.
View: All Tabs
Add Tabs to Your Default Display
Customize My Tabs
Accounts
Analytics
App Launcher
Assets
Campaigns Tell me more!
Cases
Chatter
Console
Contacts
Content
Contracts
Contribute
D&B Companies
Dashboards
Data.com
Ideas
Leads
Libraries
List Emails
Macros
Opportunities
Orders
People
Price Books
Products
Profile
Profile Feed
Profile Overview
Reports
Scorecards

Figure 18

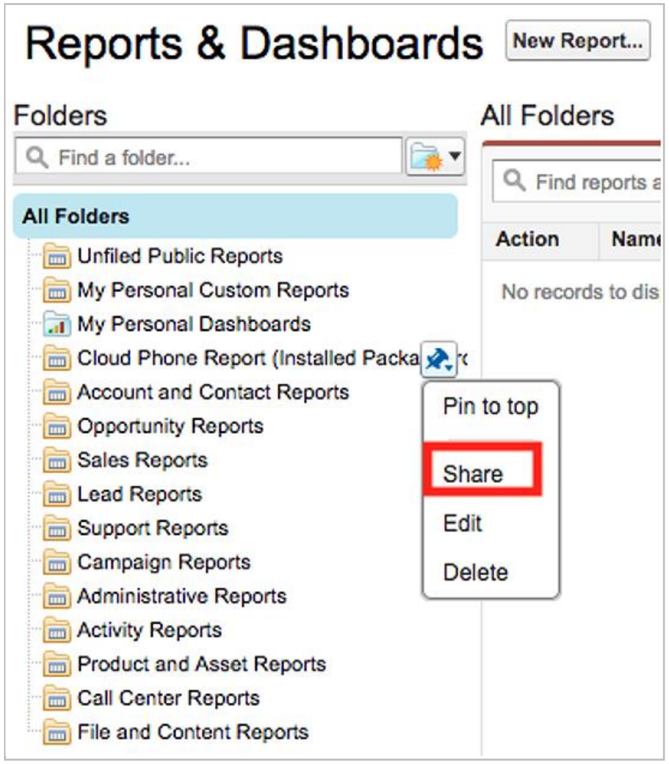

Figure 19

In the new modal window select Users or Roles you want to share reports; then click **Done** and **Close**.

Admin UI

AdminUI is a VisualForce page created for you to do organization-wide settings for your RingCentral for Salesforce app as account administrator. The page URL is: /apex/rcsfl adminUI999. (Figure 20)

For example, if your Salesforce instance home page is https://ap2.salesforce.com/home/home.jsp your adminUI URL would be https://ap2.salesforce.com/apex/rcsfl_adminUI999 You might be prompted after you enter the URL to: Please press 'Initialize' to go the AdminUI.

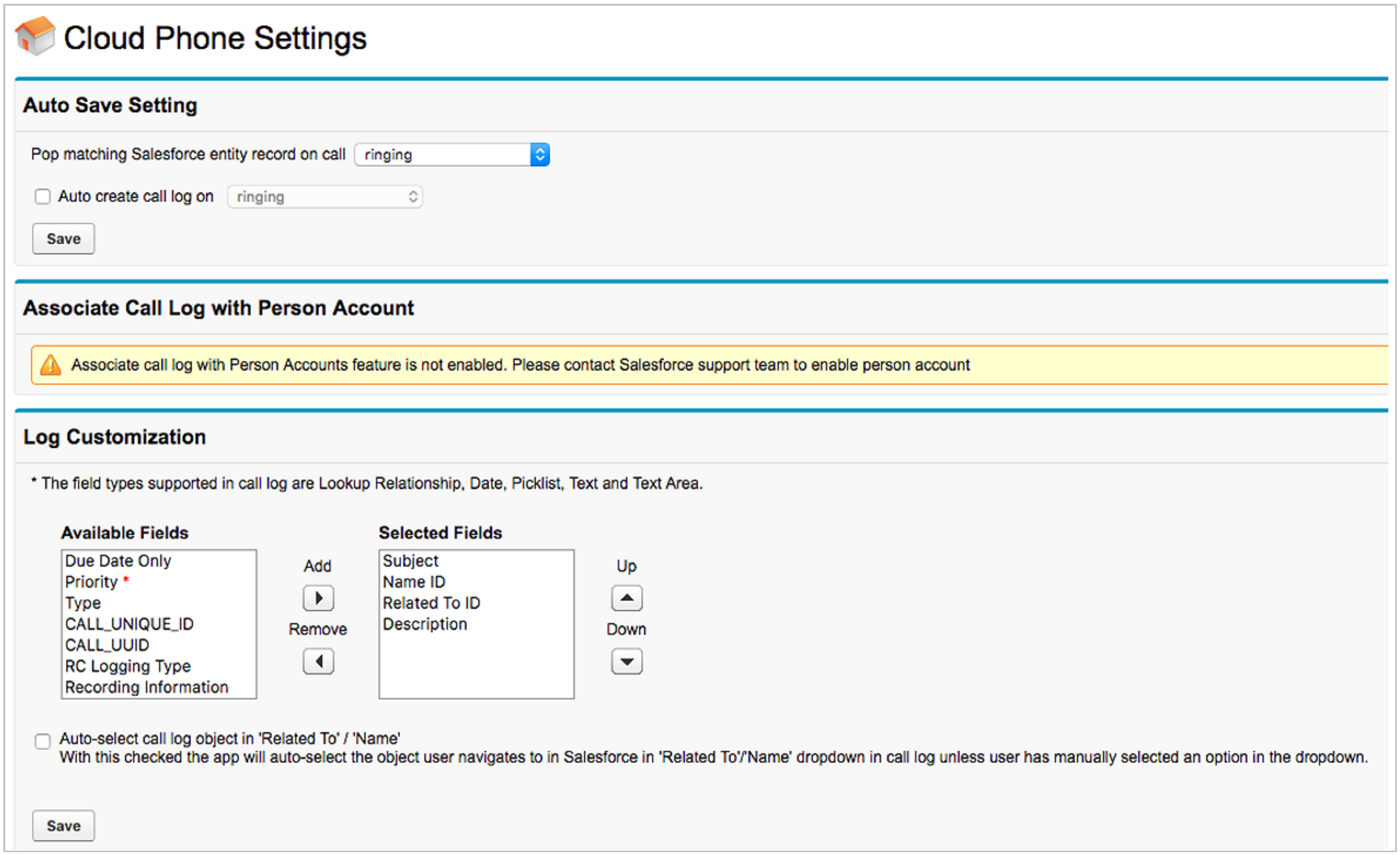

Figure 20

On the **Cloud Phone Settings** page you can access the following:

Auto Save Call Log Setting

Besides the Screen Pop Settings you made in **Setup Home > Softphone Layout**, in this section you can further define when to do the screen pop: whether to pop when an inbound call is ringing or when it's answered.

Also you can define whether to auto-create call logs and when to log them. This setting will override the settings the user does on the app > **Settings** page.

Log Customization

Add/remove call log fields by using the left/right arrows and order the selected call log fields by using the up/down arrows. Click **Save** button when call log settings are as expected and refresh the page. The call log UI of the RingCentral for Salesforce app should render these fields in the exact order they are listed in the **Selected Fields** box.

Note: the field types supported in Call Log are **Lookup Relationship**, **Date**, **Date/Time**, **Picklist**, **Text** and **Text Area**.

With Auto-select call log object in 'Related To' / 'Name' checked, the app will auto-select a matching record in 'Related To' /'Name'; if the user navigates away to view some other record, the record user views will override the previous auto-selected value in 'Related To' /'Name'.

The user could manually select a record in 'Related To' /'Name' dropdown, app will not change what user manually selects even if he/she navigates to some other record details page. The section "Associate calls with person account" is hidden by default. If you want to show it you are required to be partners of Salesforce and just open a case asking Salesforce Support to enable person account by providing Organization ID. Go to **Settings > Company Information** and use "Salesforce.com Organization ID" field.

Person Account Settings

You are able to configure person account settings in "Associate calls with person account" section on the **adminUI** page.

The section "Associate calls with person account" is hidden by default. If you want to show it you are required to be partners of Salesforce and just open a case asking Salesforce Support to enable person account by providing Organization ID. Go to **Settings > Company Information** and use the "Salesforce.com Organization ID" field. (Figure 21)

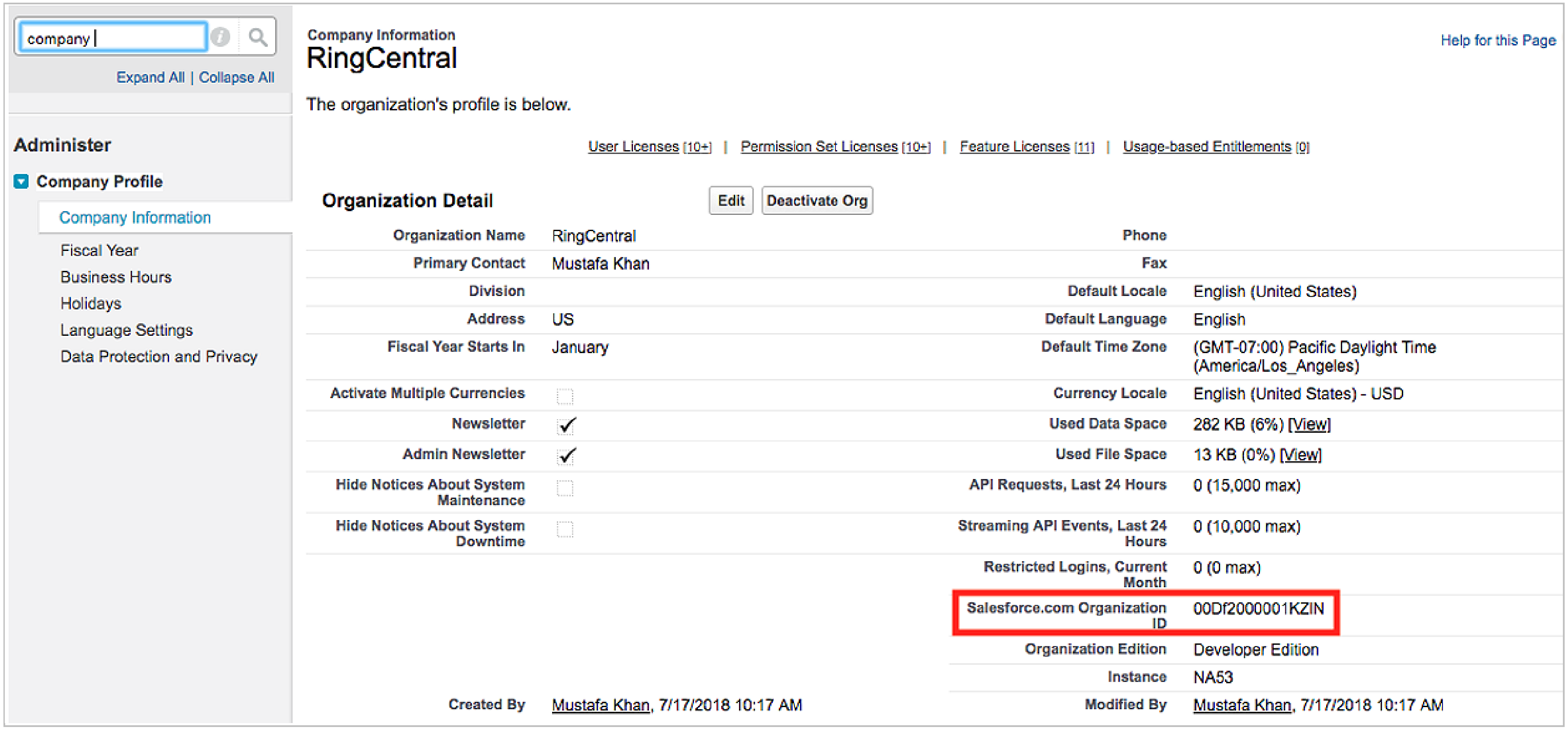
company
Expand All | Collapse All
Administer
Company Profile
Company Information
Fiscal Year
Business Hours
Holidays
Language Settings
Data Protection and Privacy
Company Information
RingCentral
Help for this Page
The organization's profile is below.
User Licenses [10+] | Permission Set Licenses [10+] | Feature Licenses [11] | Usage-based Entitlements [0]
Organization Detail
Edit
Deactivate Org
Organization Name RingCentral
Phone
Primary Contact Mustafa Khan
Fax
Division
Default Locale English (United States)
Address US
Default Language English
Fiscal Year Starts In January
Default Time Zone (GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Activate Multiple Currencies
Currency Locale English (United States) - USD
Newsletter
Used Data Space 282 KB (6%) [View]
Admin Newsletter
Used File Space 13 KB (0%) [View]
Hide Notices About System Maintenance
API Requests, Last 24 Hours 0 (15,000 max)
Hide Notices About System Downtime
Streaming API Events, Last 24 Hours 0 (10,000 max)
Restricted Logins, Current Month 0 (0 max)
Salesforce.com Organization ID 00Df2000001KZIN
Organization Edition Developer Edition
Instance NA53
Created By Mustafa Khan, 7/17/2018 10:17 AM
Modified By Mustafa Khan, 7/17/2018 10:17 AM

Figure 21

Call Recording

To allow users in your organization to access their RingCentral call recordings from within Salesforce, please go to **Setup > Customize > Activities > Task Page Layout** and click 'Edit' for the page layout you want to configure. Move the '*Call Recording*' field to the Task Detail section, as shown in Figure 22.

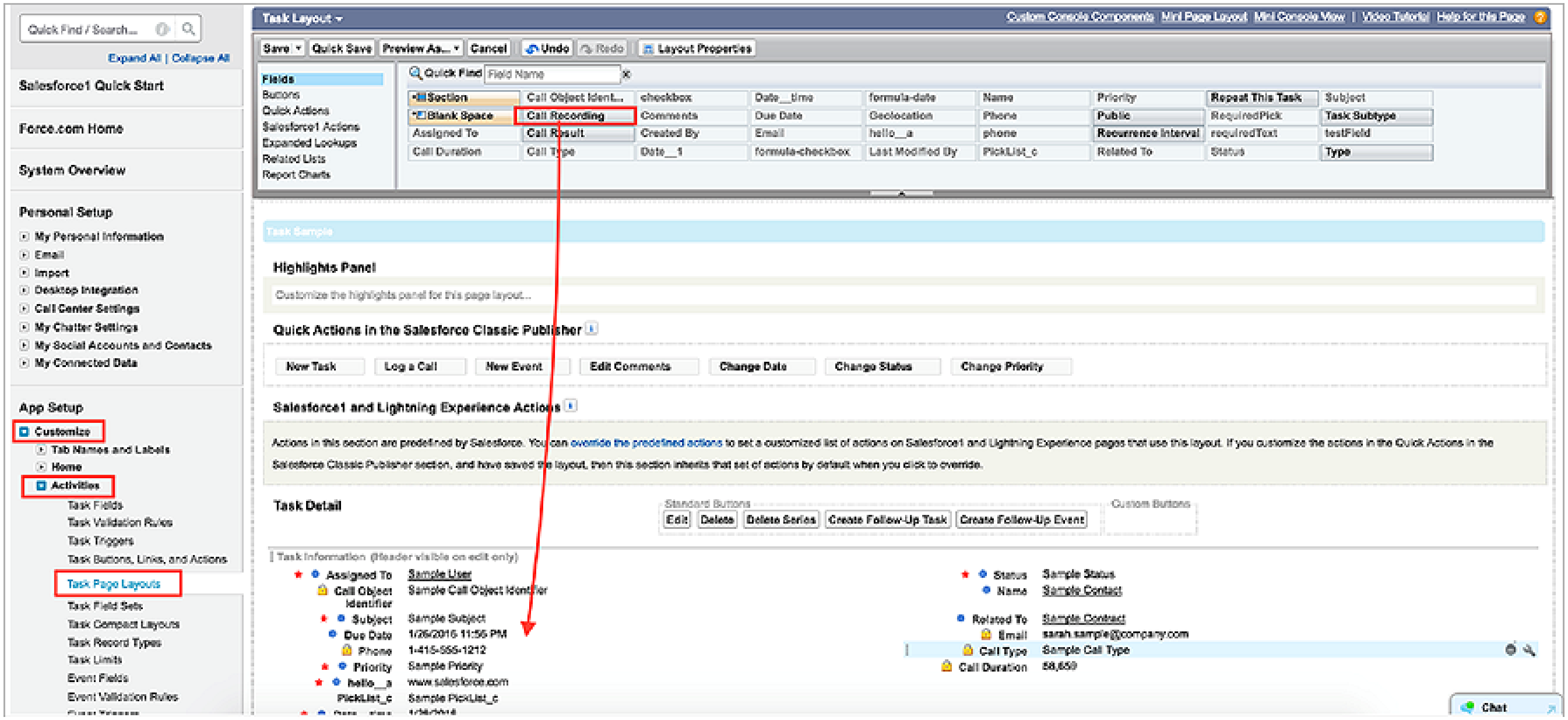

Figure 22

Add RingCentral Call and SMS Options to Salesforce

Follow the steps below you could add **Call with RingCentral** and **SMS with RingCentral** options to Account/Contact/Lead details tab in the Salesforce app. As an example, below are steps to add the options to the Accounts Page Layout.

Create New Actions

Go to **App Setup** > **Customize** > **Accounts** > **Buttons, Links, and Actions** > **New Action.** (Figure 23)

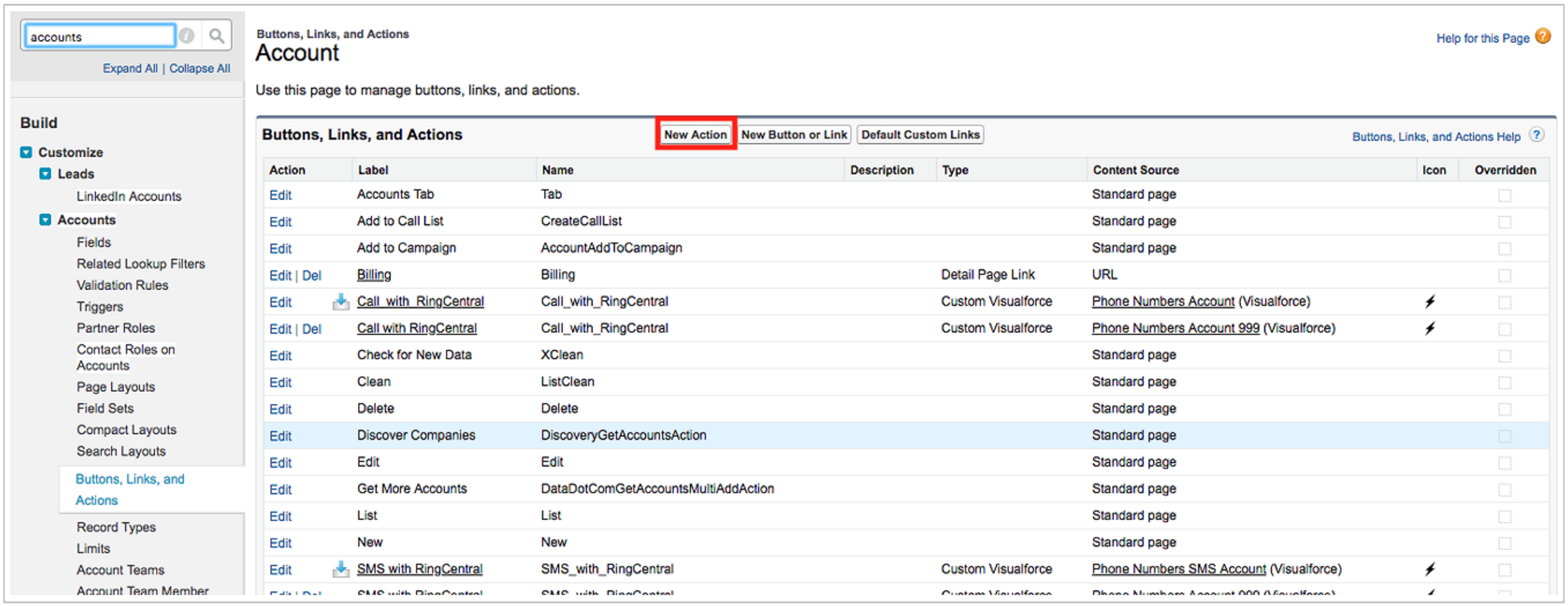

Figure 23

Select '**Custom Visualforce**' as **Action type** and select '**Phone Numbers Account999 [Phone_Numbers_Account999]**' in the **Visualforce Page** dropdown list, enter '**Call with RingCentral**' as the **Label**, and click **Save**. (Figure 24)

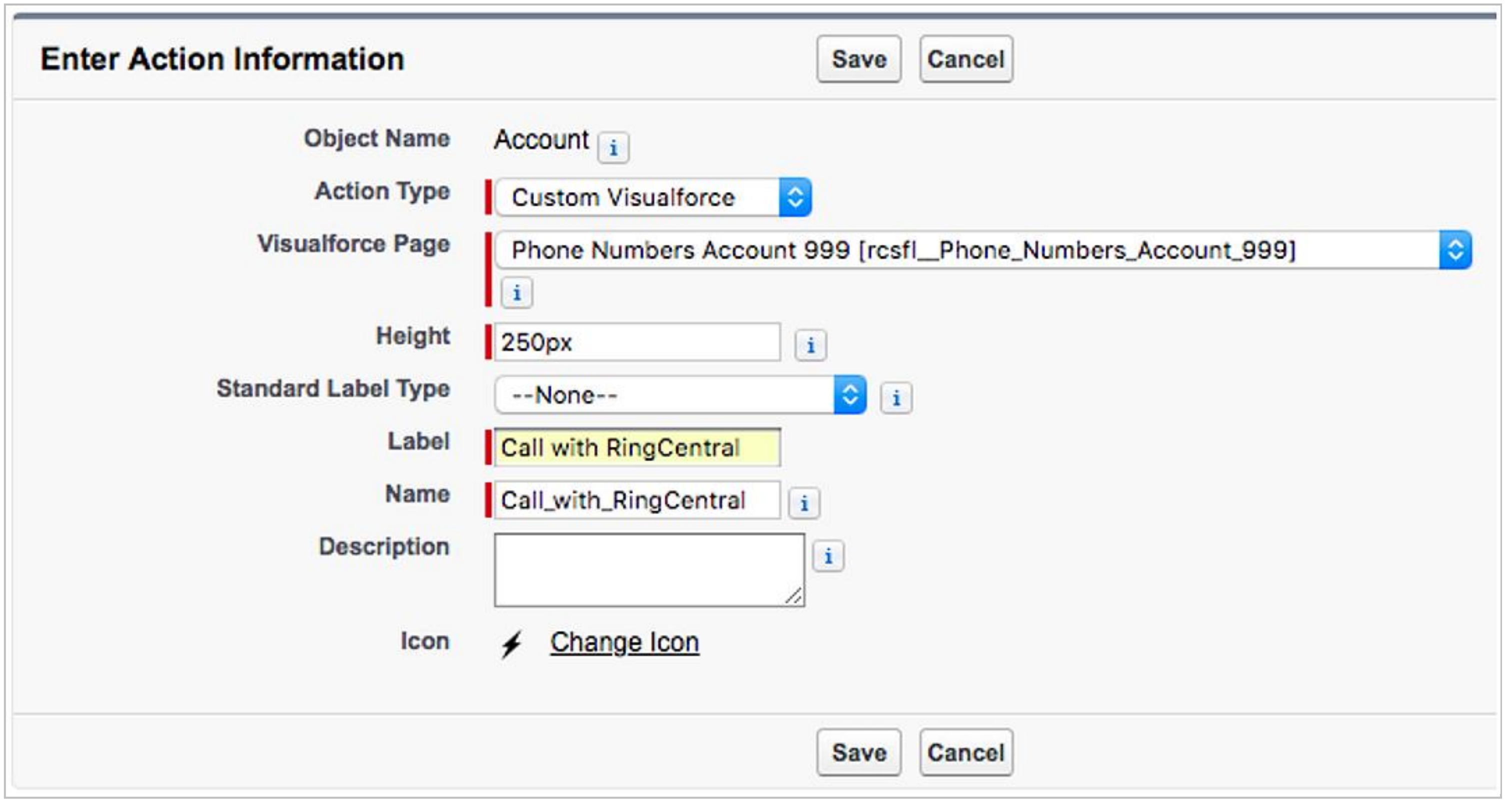

Figure 24

Repeat the above step and select '**Phone Numbers SMS Account999 [Phone_Numbers_SMS_Account999]**' in the **Visualforce Page** dropdown list, enter '**SMS with RingCentral'** as **Label**, and click **Save**. (Figure 25)

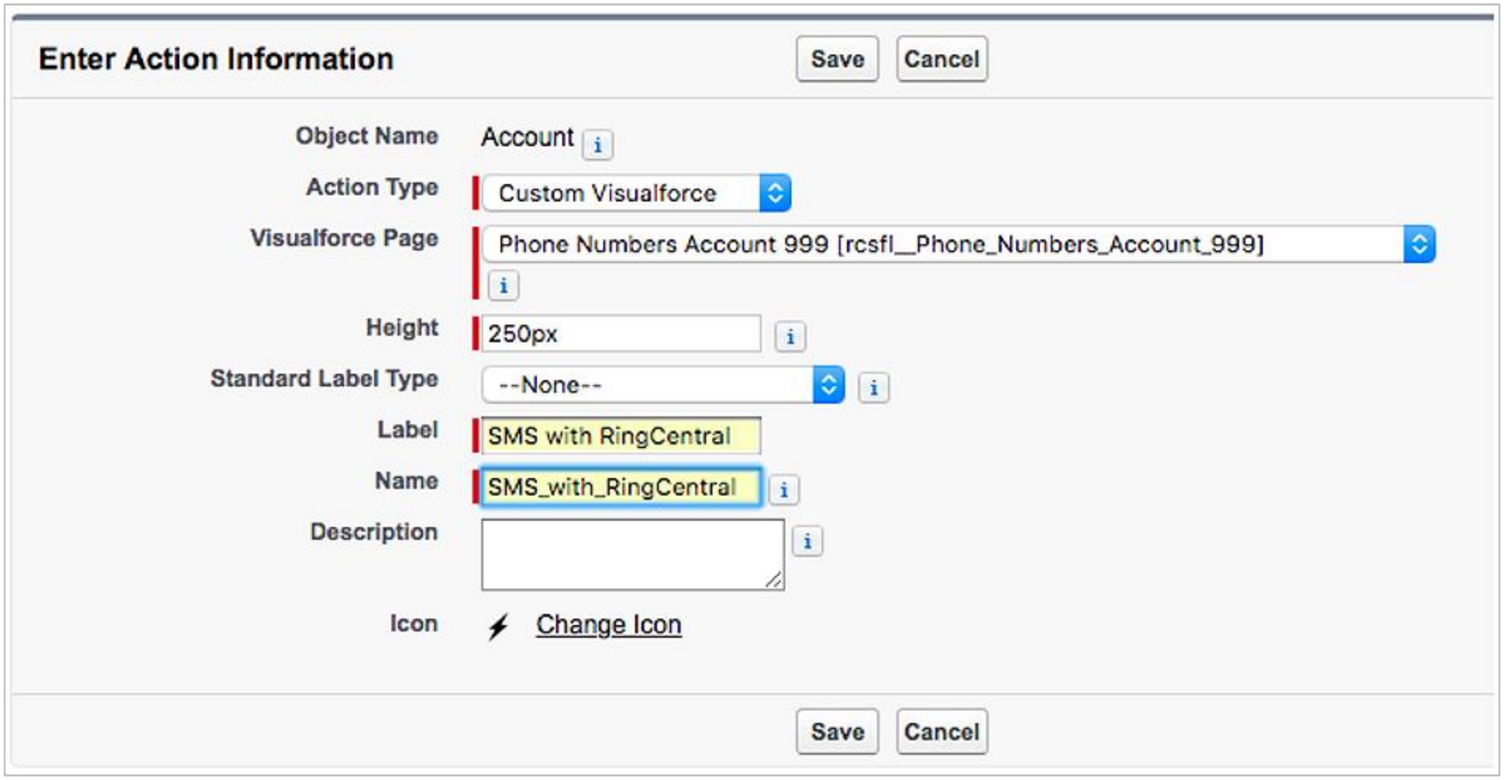

Figure 25

Add Actions to Salesforce

Go to **Setup > Customize > Accounts > Page Layouts > Page Layout Assignment**. Select the Page Layout you want to change and click Edit. (Figure 26)

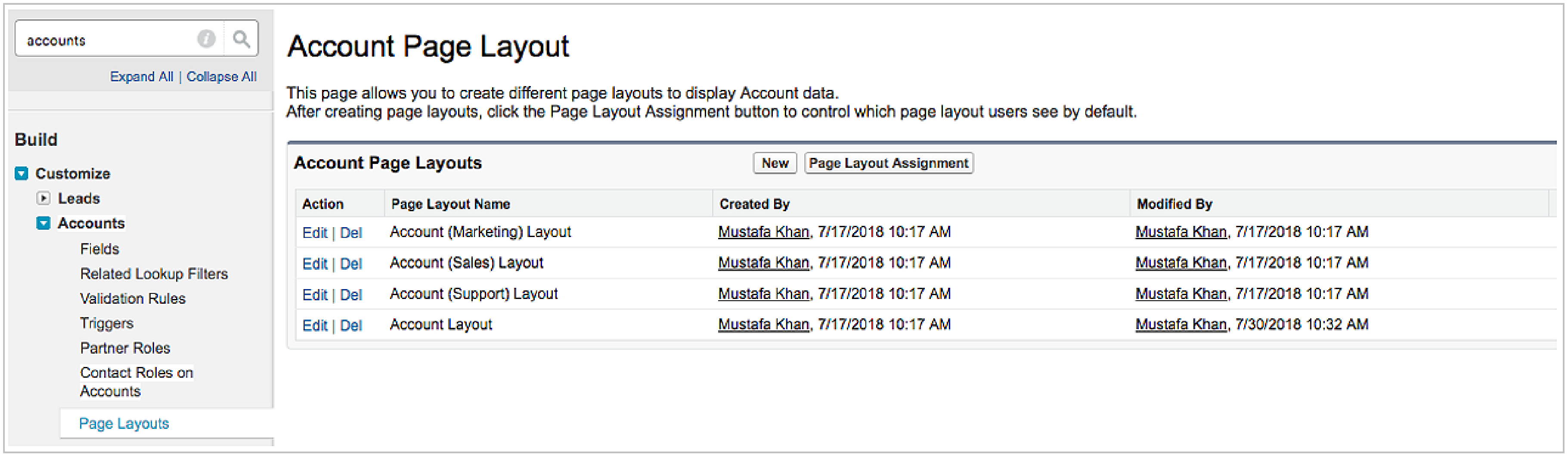

Figure 26

From Mobile & Lightning Actions list drag the actions **Call with RingCentral** and **SMS with RingCentral** to the Salesforce Mobile and Lightning Experience section. Click **Save**. (Figure 27 & 28)

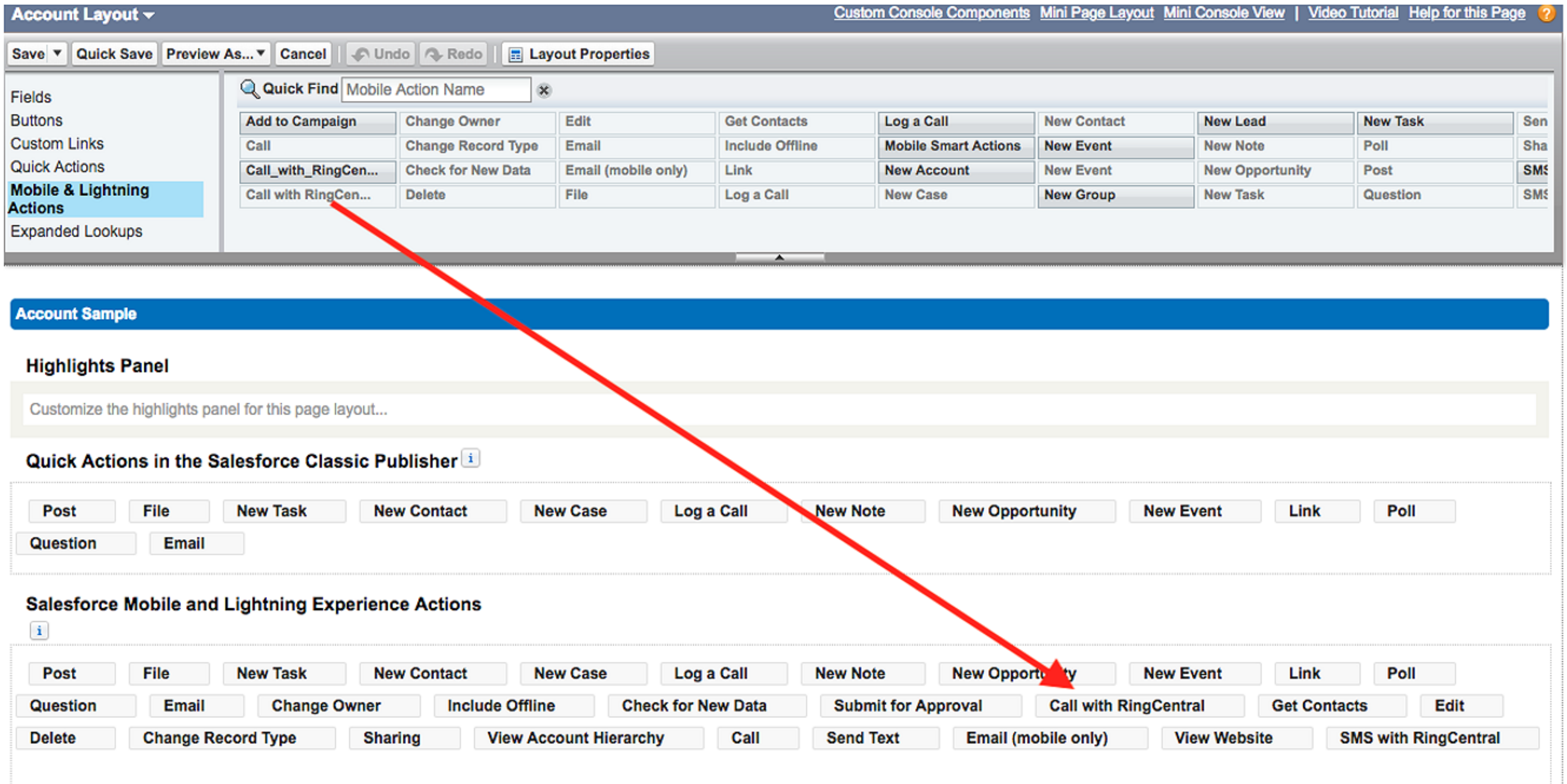

Figure 27

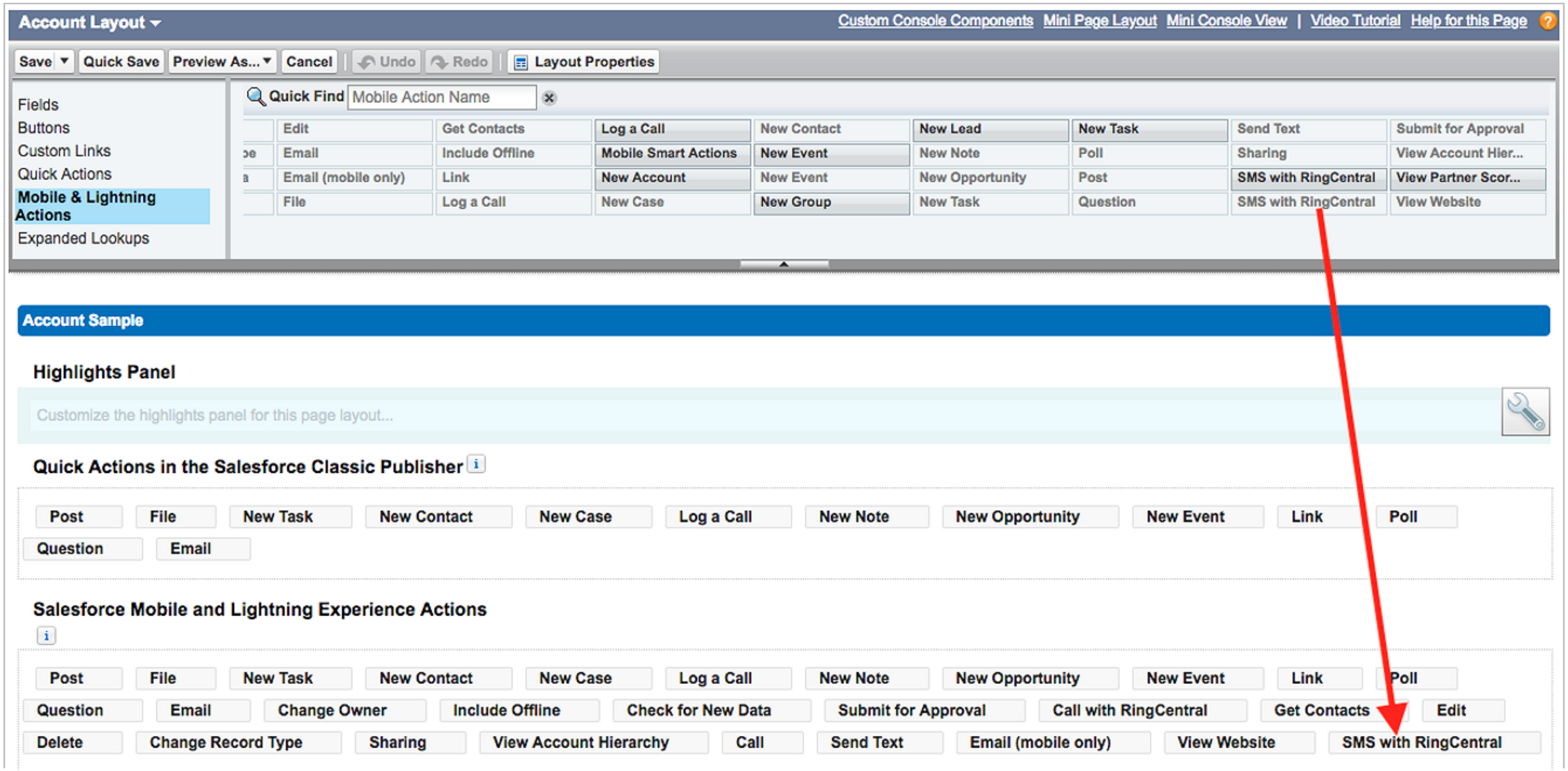
Account Layout
Custom Console Components Mini Page Layout Mini Console View | Video Tutorial Help for this Page
Save Quick Save Preview As... Cancel Undo Redo Layout Properties
Fields
Buttons
Custom Links
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Quick Find Mobile Action Name
Edit Get Contacts Log a Call New Contact New Lead New Task Send Text Submit for Approval
Email Include Offline Mobile Smart Actions New Event New Note Poll Sharing View Account Hier...
Email (mobile only) Link New Account New Event New Opportunity Post SMS with RingCentral View Partner Scor...
File Log a Call New Case New Group New Task Question SMS with RingCentral View Website
Account Sample
Highlights Panel
Customize the highlights panel for this page layout...
Quick Actions in the Salesforce Classic Publisher
Post File New Task New Contact New Case Log a Call New Note New Opportunity New Event Link Poll
Question Email
Salesforce Mobile and Lightning Experience Actions
Post File New Task New Contact New Case Log a Call New Note New Opportunity New Event Link Poll
Question Email Change Owner Include Offline Check for New Data Submit for Approval Call with RingCentral Get Contacts Edit
Delete Change Record Type Sharing View Account Hierarchy Call Send Text Email (mobile only) View Website SMS with RingCentral

Figure 28

Troubleshooting

Q: RingCentral for Salesforce is not visible for some profiles. What is the problem? Does RingCentral for Salesforce require any special permissions?

A: RingCentral for Salesforce does not require any special permissions and it should work for all out-of-the-box profiles. First, ensure that the relevant users have been added to the Call Center as given here in Step 3 of the Call Center setup above.

It is also possible that there is a custom component in the sidebar layout and the JavaScript in those components is interfering with RingCentral for Salesforce.

To resolve this issue, temporarily remove all customizations that have been applied to the sidebar component. Once you see RingCentral for Salesforce rendered properly, add your custom components back one by one so you can pinpoint which bit is creating the issue. Once you find the component causing the problem, contact the developer of that component to fix the issue.

Q: Users don't see a new tab or window opening on incoming calls. What's wrong?

A: Please ensure that the pop-up is not blocked by browser settings or by some other pop-up blocker software installed on your desktop.

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

A: You can do this by removing the users from RingCentral for Salesforce Call Center profile.

Q: What browsers does the app support?

A: The following browsers are supported by the App:

- Internet Explorer 11 + (Windows 7, 8 or higher)
- IE Edge 38+ (Windows 7, 8 or higher)
- Firefox 52+ (Windows, Mac)
- Chrome 56+ (Windows, Mac)

Q: On logging into RingCentral for Salesforce, users are getting this error message: "Your RingCentral edition does not support Salesforce Integration - please call your RingCentral account representative to upgrade your RingCentral edition." What does that mean?

A: Not all RingCentral editions have the ability to use this feature of Salesforce integration. You may have to upgrade your account to be able to use this feature. Please contact your RingCentral representative to get more information.

Q: Some of my users are getting a message saying "Insufficient Privileges" where the RingCentral integration should be.

A: These users require access to the RingCentral Visualforce page in their profile. To enable this access, go to the user's profile. You'll find a section called Visualforce Page Access. Ensure that the page RingCentral_OpenCTIIndex is included for this profile.

Q: Click To Dial is not working for some or all of my users. How do I fix it?

A: First, go to **App Setup > Call Center > Customize Call Centers** and verify that the CTI Adapter URL is pointing at:

/apex/RingCentral_OpenCTIIndex#/

If it is not pointing at the URL above, then change it to that URL and see if that fixes the issue.

If the issue is still not fixed, ensure your users don't have other apps that are handling click-to-dial calls, like InsideSales_PowerDialer.