

# RingCentral for Salesforce Classic

## Administrator 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.

### 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.

**\$34.99 USD per user per month** Get It Now

**RATING** ★★★★★ (20) **LISTED ON** 8/22/2017 **LATEST RELEASE** 7/10/2018

**CATEGORIES** Telephony Watch Demo

**Gain insights with every call, integrated cloud business communications**  
 RingCentral for Salesforce enhances your CRM experience by integrating cloud business communications to improve workforce productivity, increasing call efficiency, and enhancing customer interaction.

Click “GET IT NOW” to try today!

**1 of 4 : Place calls from within Salesforce by simply clicking on leads, contacts or account records.**

Figure 1

**Log In to AppExchange**

To continue, log in with your Salesforce credentials.

**Log In**

By submitting this request, you agree to share your information with Salesforce and the provider of this listing, RingCentral, Inc...

Listing: RingCentral for Salesforce

Don't have a Salesforce account?

**Continue as Guest**

Cancel

Figure 2

**Where do you want to install this package?**

Before you install in a production org, we suggest testing in a sandbox.

**Install in a Production Environment**  
Install where you or your users work, including developer orgs.

**Install in Production**

**Install in a Sandbox**  
Test in a copy of a production org.

**Install in Sandbox**

Cancel

Figure 3

### Confirm Installation Details

Duration	Number of Subscribers
Does Not Expire	Site-wide

Username

ghulamk2@gmail.com

**Here are the details we'll share from your profile**

\* First Name

Mustafa

\* Last Name

Khan

\* Job Title

Product Management Integrations

\* Email

ghulamk2@gmail.com

Phone

\* Company

RingCentral

\* Country

United States

\* State/Province

California

Edit Profile

☒ 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

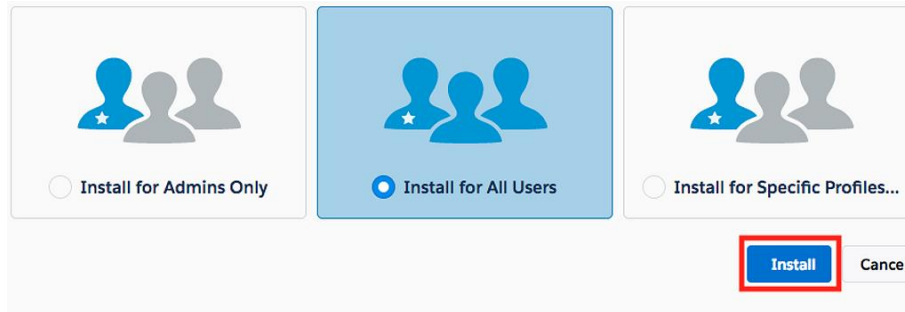


Figure 5

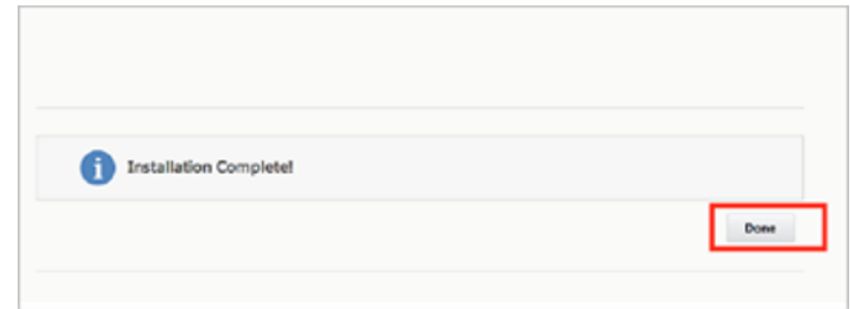


Figure 6

## Installed Packages

[Help for this Page ?](#)

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.



### Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	<a href="#">rc_sf_package</a>	RingCentral	5.11.4	rcsfl	Active	Unlimited	0	Does not Expire	7/31/2018 10:34 AM		1	0	1	Passed

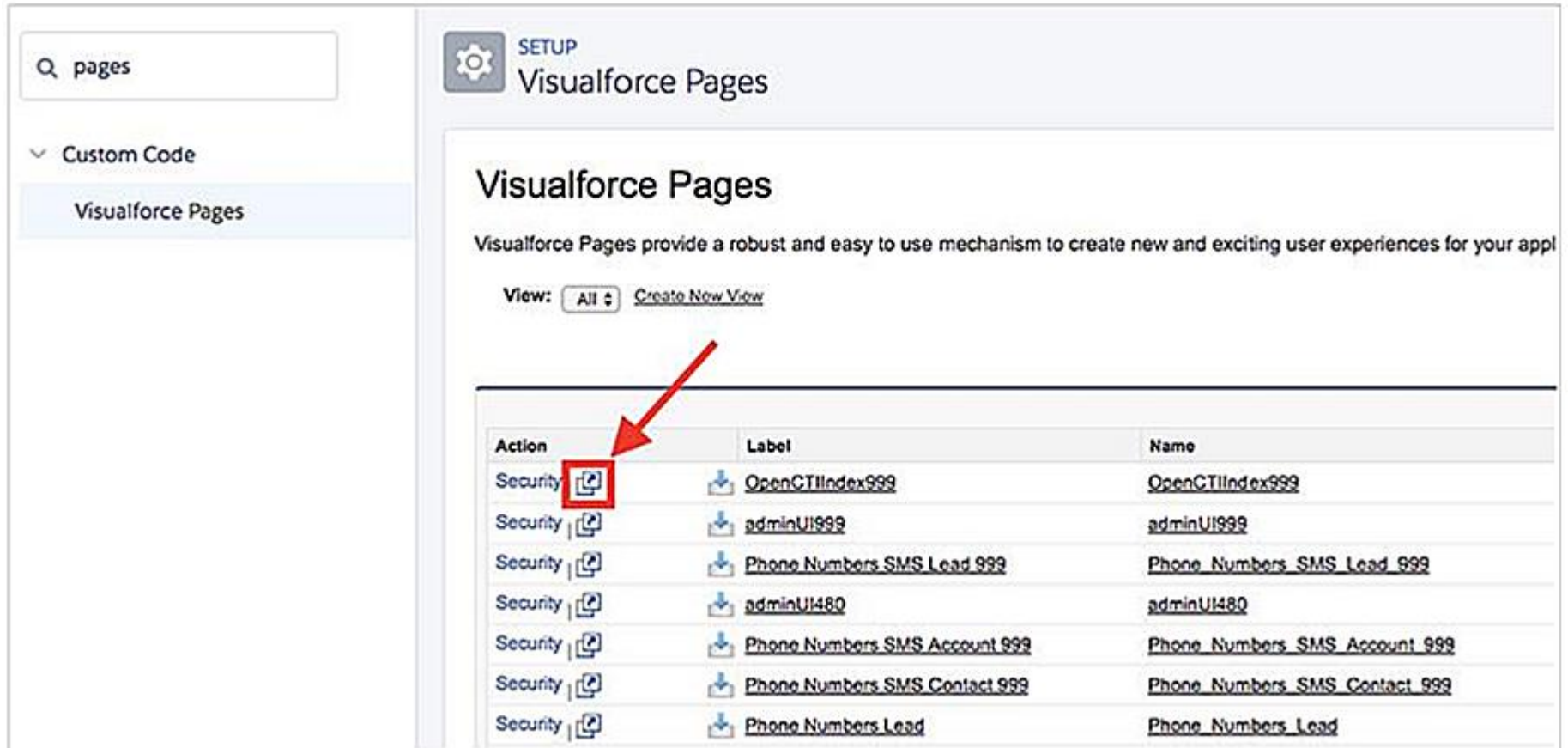
### Uninstalled Packages

No uninstalled package data archives

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)



**Visualforce Pages**

Visualforce Pages provide a robust and easy to use mechanism to create new and exciting user experiences for your appl

View: **All** [Create New View](#)















Action	Label	Name
Security 	 <a href="#">OpenCTIIndex999</a>	<a href="#">OpenCTIIndex999</a>
Security 	 <a href="#">adminUI999</a>	<a href="#">adminUI999</a>
Security 	 <a href="#">Phone Numbers SMS Lead 999</a>	<a href="#">Phone Numbers SMS Lead 999</a>
Security 	 <a href="#">adminUI480</a>	<a href="#">adminUI480</a>
Security 	 <a href="#">Phone Numbers SMS Account 999</a>	<a href="#">Phone Numbers SMS Account 999</a>
Security 	 <a href="#">Phone Numbers SMS Contact 999</a>	<a href="#">Phone Numbers SMS Contact 999</a>
Security 	 <a href="#">Phone Numbers Lead</a>	<a href="#">Phone Numbers Lead</a>

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)

Goto **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)

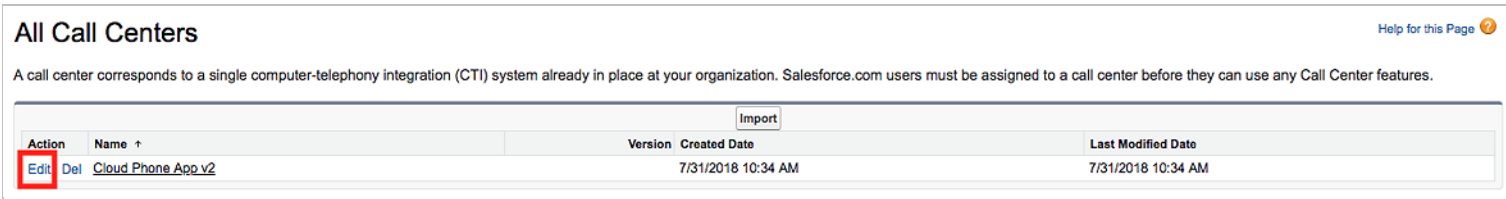
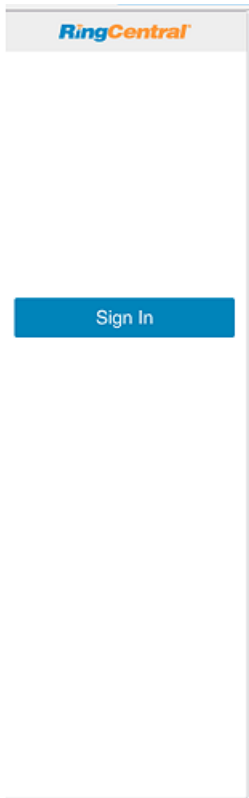


Figure 8B

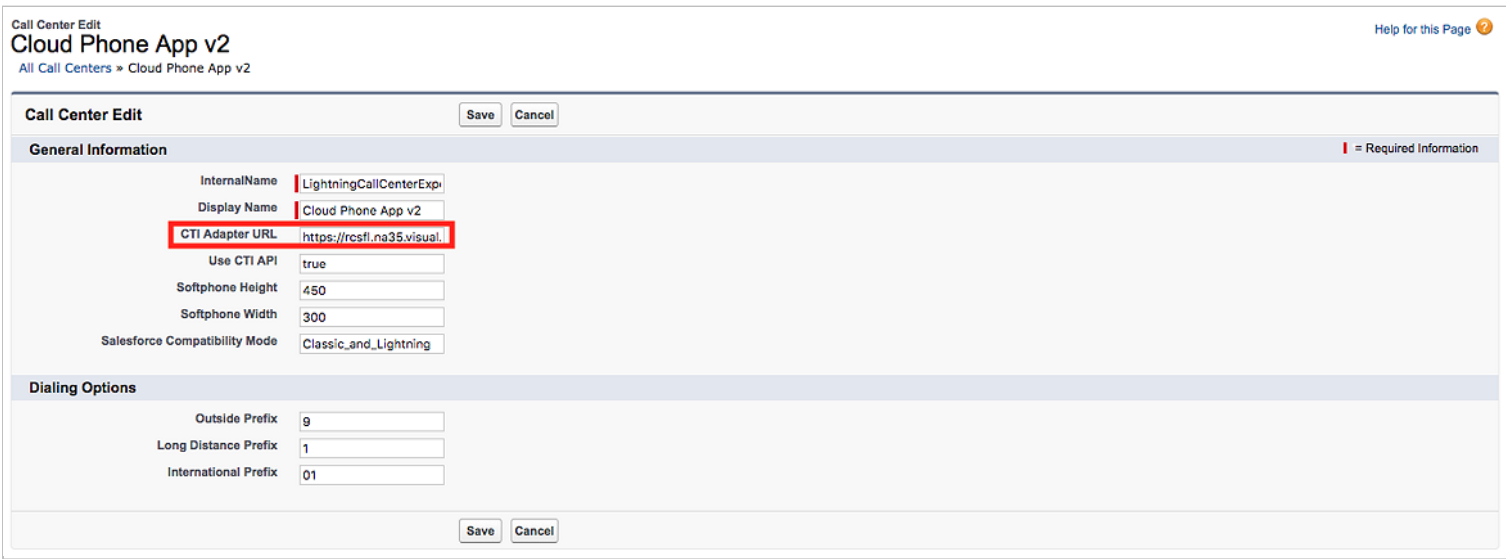


Figure 8C

### 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)

Call Center

## Cloud Phone App v2

[All Call Centers](#) » Cloud Phone App v2

Call Center Detail

Edit

Delete

Clone

General Information

InternalName	LightningCallCenterExport
Display Name	Cloud Phone App v2
CTI Adapter URL	https://rcsfl.na35.visual.force.com/apex/OpenCTIIndex999
Use CTI API	true
Softphone Height	450
Softphone Width	300
Salesforce Compatibility Mode	Classic_and_Lightning

Dialing Options

Outside Prefix	9
Long Distance Prefix	1
International Prefix	01

Call Center Users

Manage Call Center Users

Call Center Users by Profile

Total	0
-------	---

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 UsersRemove Users

Full Name ↑	Alias	Username	Role
No records to display.			

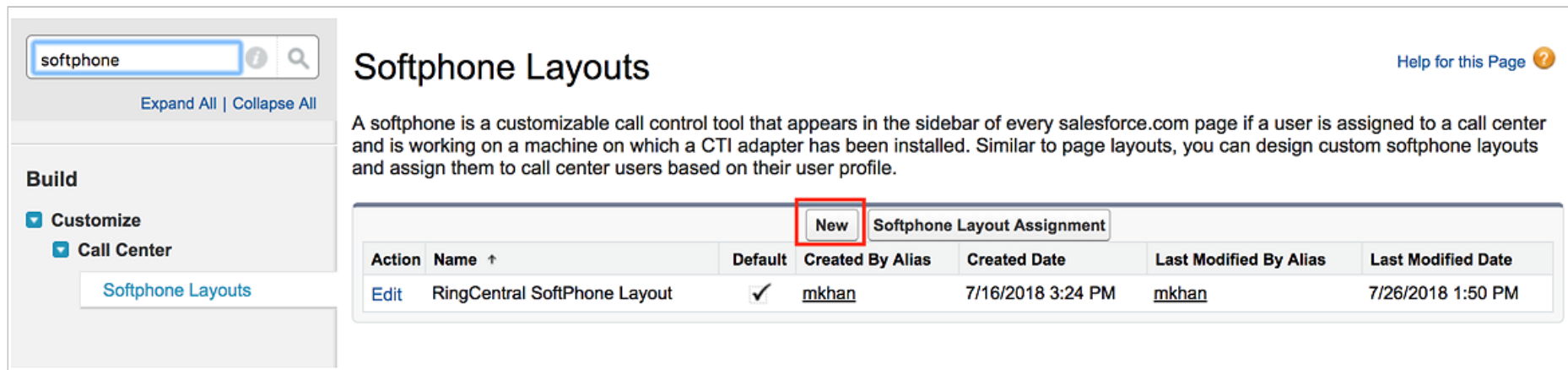
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P |

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).



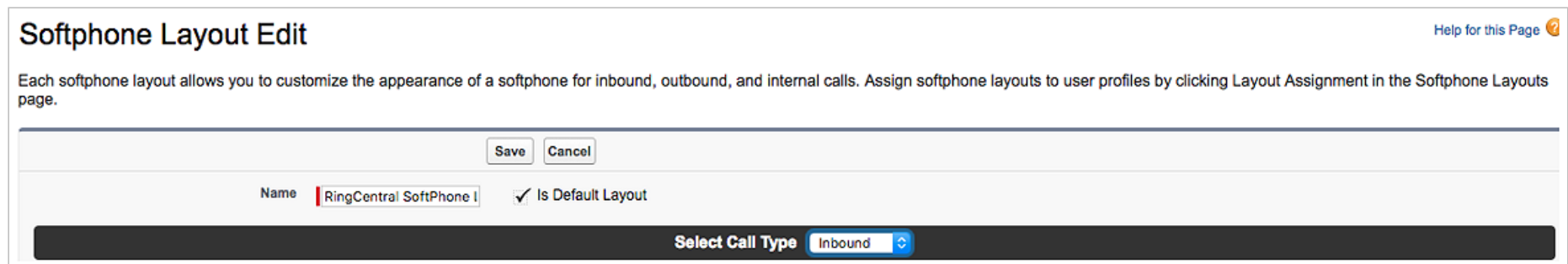
**Softphone Layouts** [Help for this Page](#)

A softphone is a customizable call control tool that appears in the sidebar of every salesforce.com page if a user is assigned to a call center and is working on a machine on which a CTI adapter has been installed. Similar to page layouts, you can design custom softphone layouts and assign them to call center users based on their user profile.

Action	Name ↑	Default	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
<a href="#">Edit</a>	RingCentral SoftPhone Layout	<input checked="" type="checkbox"/>	<a href="#">mkhan</a>	7/16/2018 3:24 PM	<a href="#">mkhan</a>	7/26/2018 1:50 PM

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).



**Softphone Layout Edit** [Help for this Page](#)

Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layouts to user profiles by clicking Layout Assignment in the Softphone Layouts page.

[Save](#) [Cancel](#)

Name  ☒ Is Default Layout

Select Call Type

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**.

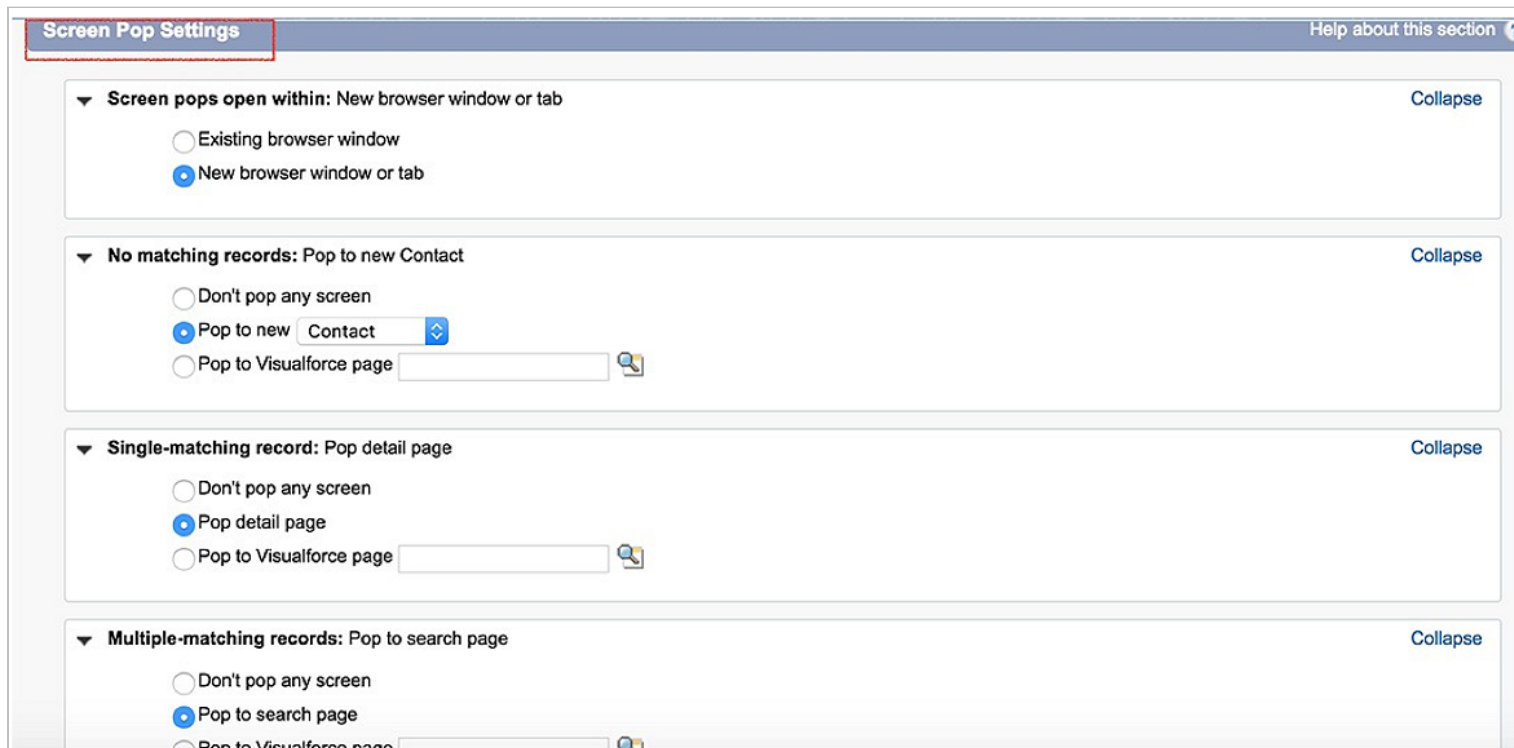


Figure 13

## 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)

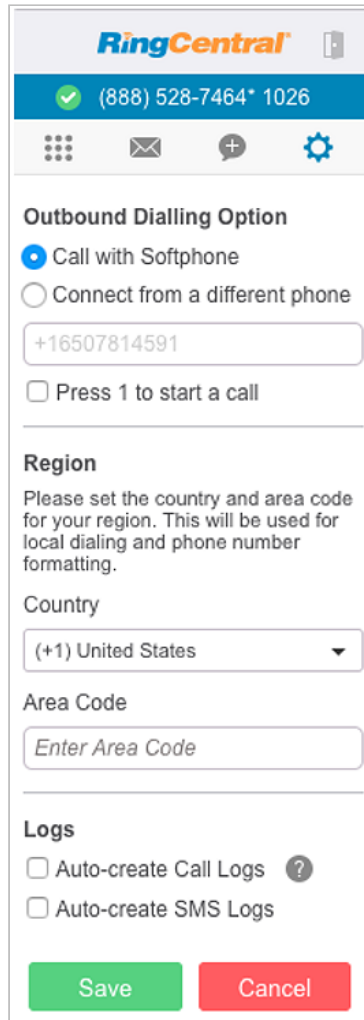
The screenshot shows the 'Softphone Layout Assignment' page in Salesforce. At the top, there is a 'SETUP' header with a gear icon and the title 'Softphone Layouts'. Below this is a sub-header 'Softphone Layout Assignment'. A instruction text reads: 'Assign a softphone layout to each profile in the list below. Only profiles that include call center'. There are 'Save' and 'Cancel' buttons at the top right of the table area. The table has a header row labeled 'Profile'. The first row of data is 'System Administrator (1)'. A dropdown menu is open for this row, showing a checkmark next to '-- Default --' and 'RingCentral SoftPhone Layout' as the selected option.

Profile
System Administrator (1)

Figure 14

## Setting up Preset Call Dispositions

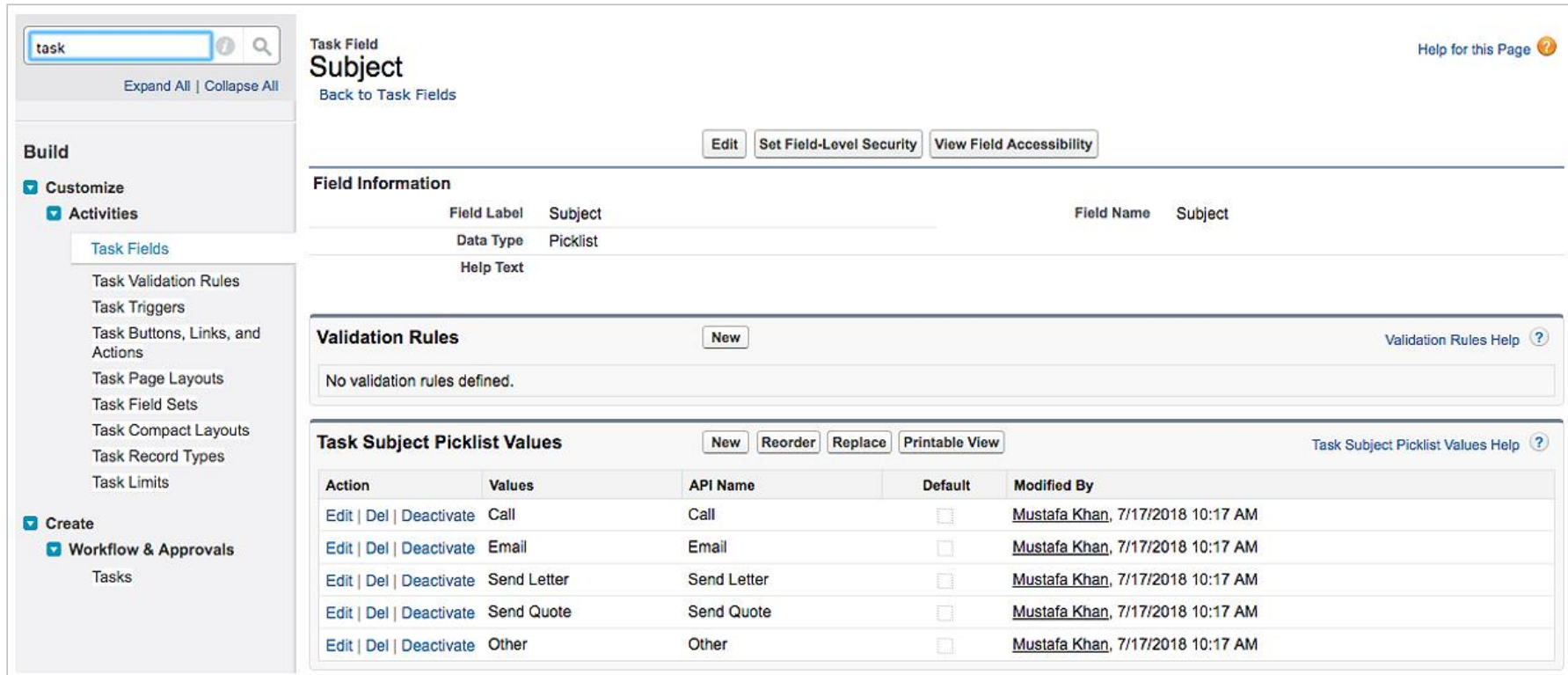
RingCentral for Salesforce includes the capability to provide a list of preset call dispositions to your end users to make logging calls quick and easy. These dispositions appear in a dropdown list under the Subject area of the call log (Figure 15):



The image shows a mobile app interface for RingCentral. At the top, there's a header with the RingCentral logo and a status bar. Below the header, there's a blue bar with a green checkmark and the phone number (888) 528-7464\* 1026. Underneath, there's a row of icons: a grid of dots, an envelope, a speech bubble with a plus sign, and a gear. The main content area is divided into sections. The first section is titled "Outbound Dialling Option" and contains two radio buttons: "Call with Softphone" (selected) and "Connect from a different phone". Below these is a text input field containing "+16507814591". There's also a checkbox labeled "Press 1 to start a call". The second section is titled "Region" and contains a paragraph of text: "Please set the country and area code for your region. This will be used for local dialling and phone number formatting." Below this is a "Country" dropdown menu showing "(+1) United States". There's also an "Area Code" text input field with the placeholder text "Enter Area Code". The third section is titled "Logs" and contains two checkboxes: "Auto-create Call Logs" (with a question mark icon) and "Auto-create SMS Logs". At the bottom, there are two buttons: a green "Save" button and a red "Cancel" button.

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):



The screenshot displays the 'Task Field Subject' configuration page in Salesforce. The left sidebar shows the navigation menu with 'Customize' and 'Activities' expanded, leading to 'Task Fields'. The main content area includes a search bar, a 'Back to Task Fields' link, and buttons for 'Edit', 'Set Field-Level Security', and 'View Field Accessibility'.

**Field Information**

Field Label	Subject	Field Name	Subject
Data Type	Picklist		
Help Text			

**Validation Rules**

No validation rules defined.

**Task Subject Picklist Values**

Action	Values	API Name	Default	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Call	Call	<input type="checkbox"/>	<a href="#">Mustafa Khan</a> , 7/17/2018 10:17 AM
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Email	Email	<input type="checkbox"/>	<a href="#">Mustafa Khan</a> , 7/17/2018 10:17 AM
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Send Letter	Send Letter	<input type="checkbox"/>	<a href="#">Mustafa Khan</a> , 7/17/2018 10:17 AM
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Send Quote	Send Quote	<input type="checkbox"/>	<a href="#">Mustafa Khan</a> , 7/17/2018 10:17 AM
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Other	Other	<input type="checkbox"/>	<a href="#">Mustafa Khan</a> , 7/17/2018 10:17 AM

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)

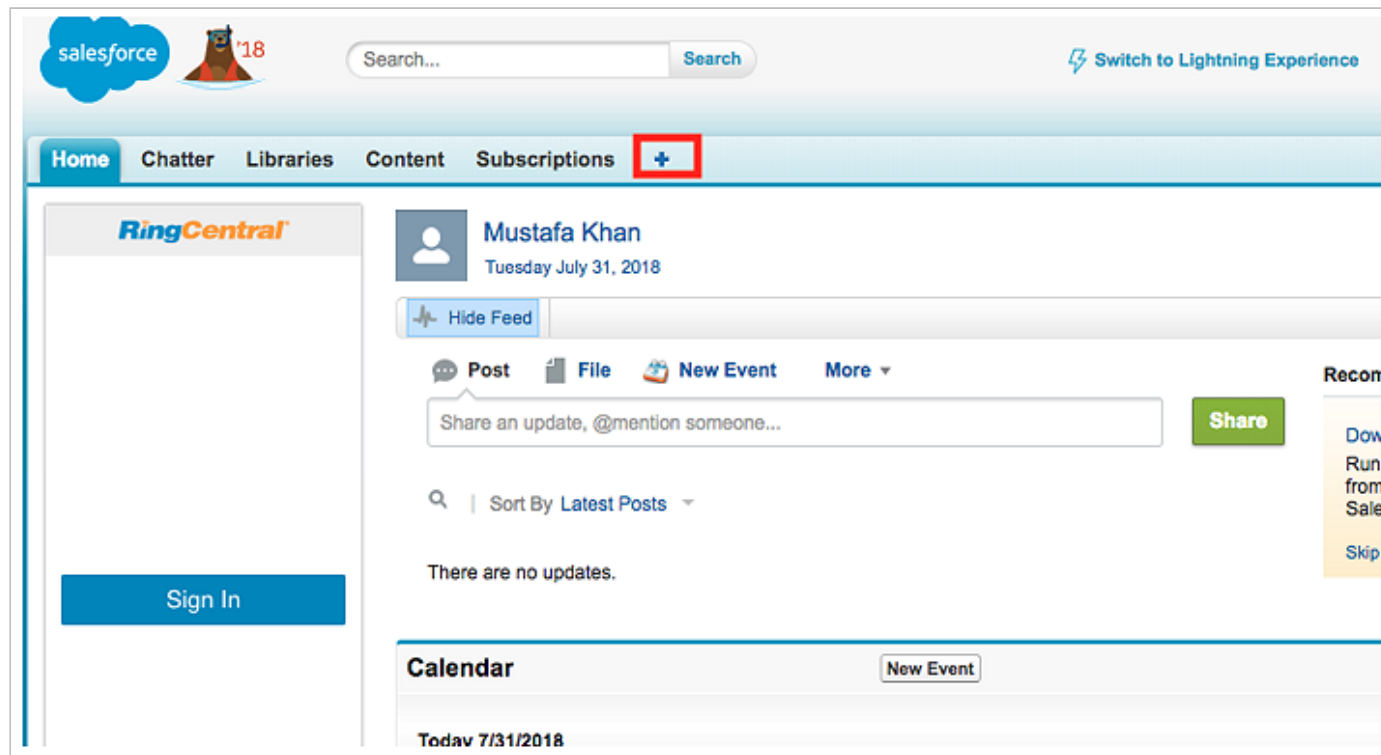


Figure 17

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](#)































 <a href="#">Accounts</a>	 <a href="#">Ideas</a>
 <a href="#">Analytics</a>	 <a href="#">Leads</a>
 <a href="#">App Launcher</a>	 <a href="#">Libraries</a>
 <a href="#">Assets</a>	 <a href="#">List Emails</a>
 <a href="#">Campaigns</a> Tell me more!	 <a href="#">Macros</a>
 <a href="#">Cases</a>	 <a href="#">Opportunities</a>
 <a href="#">Chatter</a>	 <a href="#">Orders</a>
 <a href="#">Console</a>	 <a href="#">People</a>
 <a href="#">Contacts</a>	 <a href="#">Price Books</a>
 <a href="#">Content</a>	 <a href="#">Products</a>
 <a href="#">Contracts</a>	 <a href="#">Profile</a>
 <a href="#">Contribute</a>	 <a href="#">Profile Feed</a>
 <a href="#">D&amp;B Companies</a>	 <a href="#">Profile Overview</a>
 <a href="#">Dashboards</a>	 <a href="#">Reports</a>
 <a href="#">Data.com</a>	 <a href="#">Scorecards</a>

Figure 18

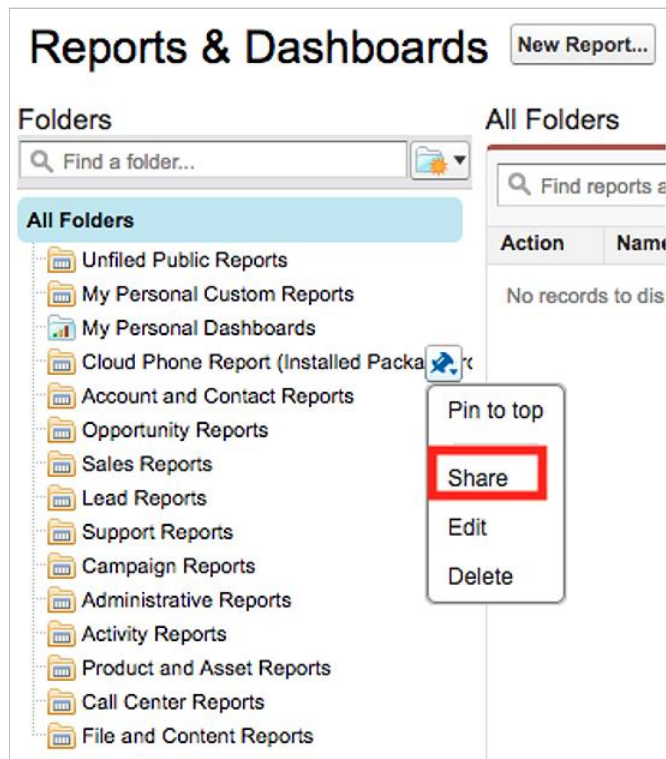


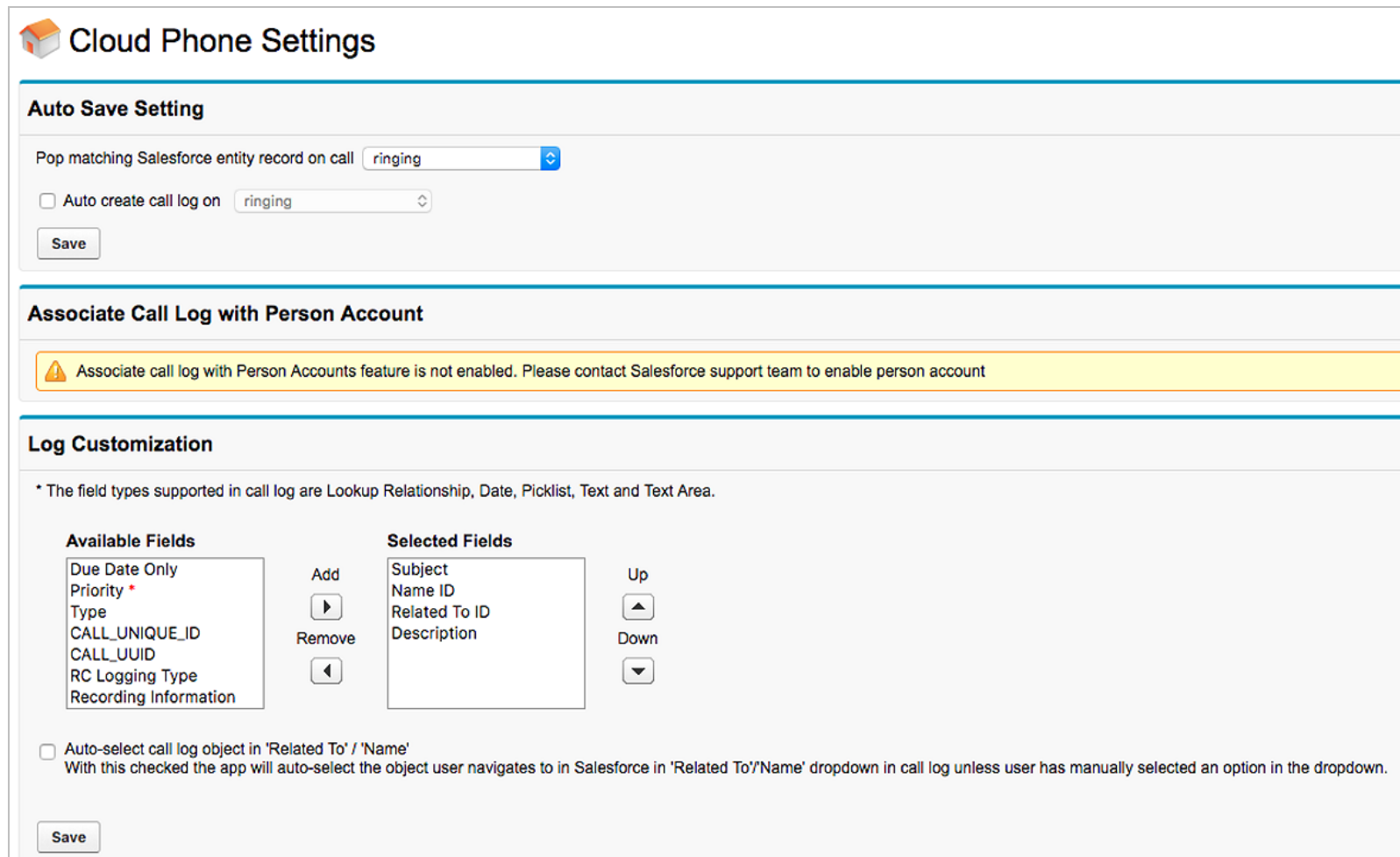
Figure 19

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](https://ap2.salesforce.com/apex/rcsfl_adminUI999). You might be prompted after you enter the URL to: Please press 'Initialize' to go the AdminUI.



**Cloud Phone Settings**


**Auto Save Setting**

Pop matching Salesforce entity record on call ringing

☐ Auto create call log on ringing





**Save**

**Associate Call Log with Person Account**

 Associate call log with Person Accounts feature is not enabled. Please contact Salesforce support team to enable person account

**Log Customization**

\* The field types supported in call log are Lookup Relationship, Date, Picklist, Text and Text Area.

Available Fields		Selected Fields	
Due Date Only	Add 	Subject	Up 
Priority *		Name ID	
Type	Remove 	Related To ID	Down 
CALL_UNIQUE_ID		Description	
CALL_UUID			
RC Logging Type			
Recording Information			

☐ Auto-select call log object in 'Related To' / 'Name'  
With this checked the app will auto-select the object user navigates to in Salesforce in 'Related To'/'Name' dropdown in call log unless user has manually selected an option in the dropdown.

**Save**

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)

?
Q

[Expand All](#) | [Collapse All](#)

[Help for this Page](#)

**Administer**  

Company Profile

Company Information

[Fiscal Year](#)  
[Business Hours](#)  
[Holidays](#)  
[Language Settings](#)  
[Data Protection and Privacy](#)

**Company Information**  
**RingCentral**

[User Licenses \(10+\)](#) | 
 [Permission Set Licenses \(10+\)](#) | 
 [Feature Licenses \(11\)](#) | 
 [Usage-based Entitlements \(0\)](#)

The organization's profile is below.

**Organization Detail**  

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	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Newsletter	<input checked="" type="checkbox"/>	Used Data Space	282 KB (6%) <a href="#">[View]</a>
Admin Newsletter	<input checked="" type="checkbox"/>	Used File Space	13 KB (0%) <a href="#">[View]</a>
Hide Notices About System Maintenance	<input type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
		Restricted Logins, Current Month	0 (0 max)
		<b>Salesforce.com Organization ID</b>	<b>00Df2000001KZIN</b>
		Organization Edition	Developer Edition
		Instance	NA53
		Modified By	<a href="#">Mustafa Khan</a> , 7/17/2018 10:17 AM

Edit

Deactivate Org

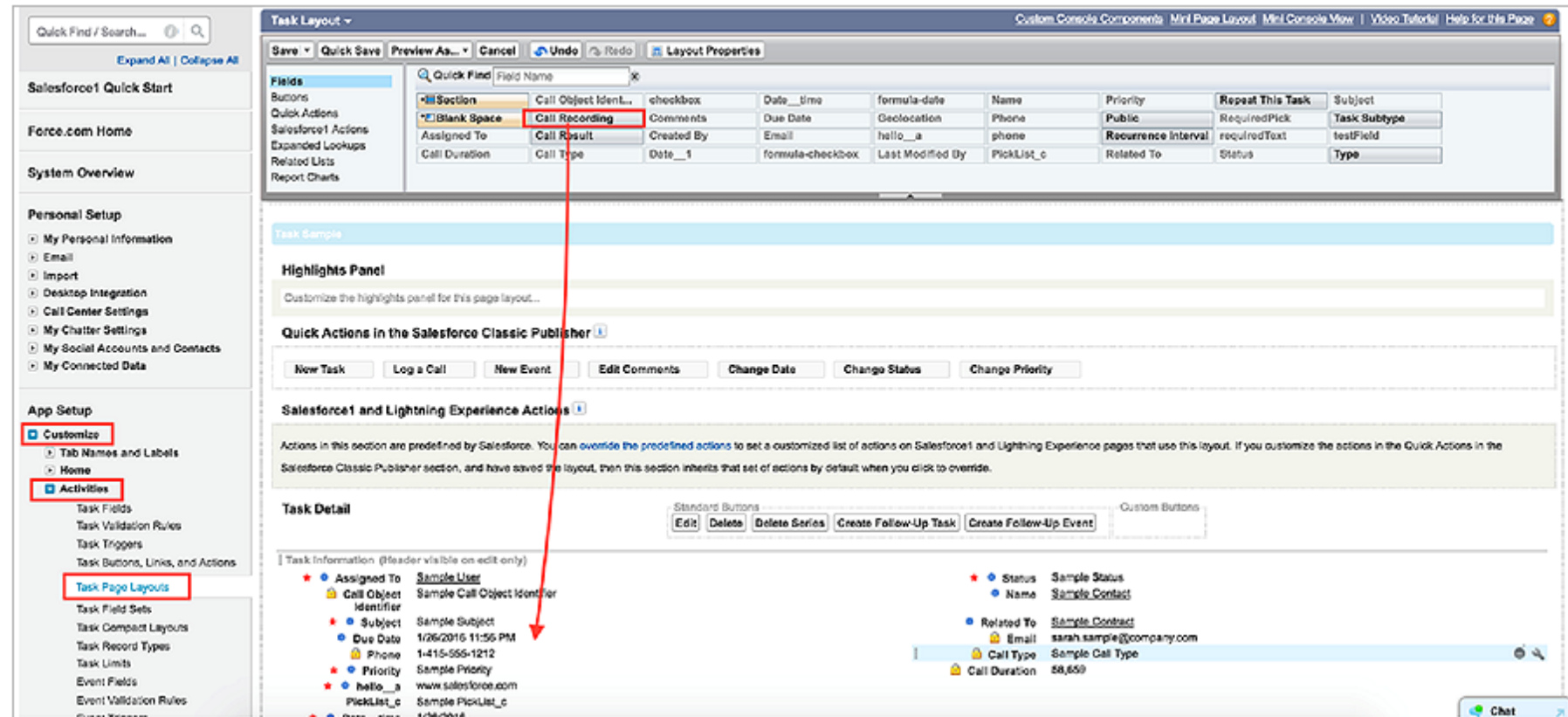
Created By

[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.



The screenshot shows the Salesforce Classic Task Page Layout editor. The left sidebar contains the navigation menu with the following items:

- Salesforce1 Quick Start
- Force.com Home
- System Overview
- Personal Setup
  - My Personal Information
  - Email
  - Import
  - Desktop Integration
  - Call Center Settings
  - My Chatter Settings
  - My Social Accounts and Contacts
  - My Connected Data
- App Setup
  - Customize**
    - Tab Names and Labels
    - Home
    - Activities**
      - Task Fields
      - Task Validation Rules
      - Task Triggers
      - Task Buttons, Unks, and Actions
      - Task Page Layouts**
      - Task Field Sets
      - Task Compact Layouts
      - Task Record Types
      - Task Limits
      - Event Fields
      - Event Validation Rules

The main area shows the 'Task Layout' editor. The 'Fields' list on the left contains the following fields:

Field Name	Field Type
Call Object Ident...	checkbox
Call Recording	checkbox
Comments	Text
Created By	Text
Date__1	Text
Date__time	Text
Due Date	Text
Email	Text
Formula-checkbox	Text
Formula-date	Text
Formula-geolocation	Text
Formula-hello__a	Text
Formula-last modified by	Text
Formula-picklist_c	Text
Name	Text
Phone	Text
Priority	Text
Public	Text
Recurrence Interval	Text
Related To	Text
Repeat This Task	Text
RequiredPick	Text
RequiredText	Text
Status	Text
Subject	Text
Task Subtype	Text
testField	Text
Type	Text

The 'Task Detail' section on the right shows the following information:

- Task Information (Header visible on edit only)**
- Assigned To:** Sample User
- Call Object Identifier:** Sample Call Object Identifier
- Subject:** Sample Subject
- Due Date:** 1/26/2016 11:56 PM
- Phone:** 1-415-555-1212
- Priority:** Sample Priority
- hello\_\_a:** www.salesforce.com
- PickList\_c:** Sample PickList\_c
- Status:** Sample Status
- Name:** Sample Contact
- Related To:** Sample Contact
- Email:** sarah.sample@company.com
- Call Type:** Sample Call Type
- Call Duration:** 58,650

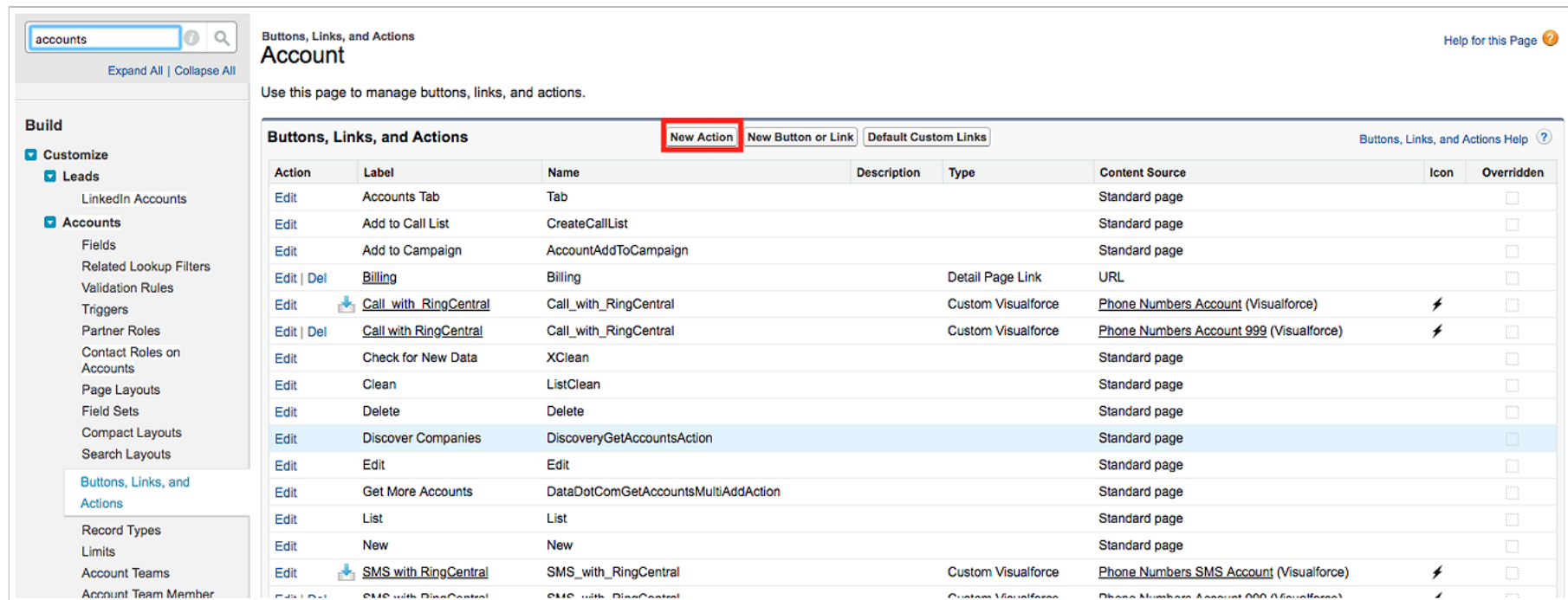
Figure 22

## 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)



Buttons, Links, and Actions

Account

Use this page to manage buttons, links, and actions.

Buttons, Links, and Actions Help ?

Buttons, Links, and Actions

New Action New Button or Link Default Custom Links









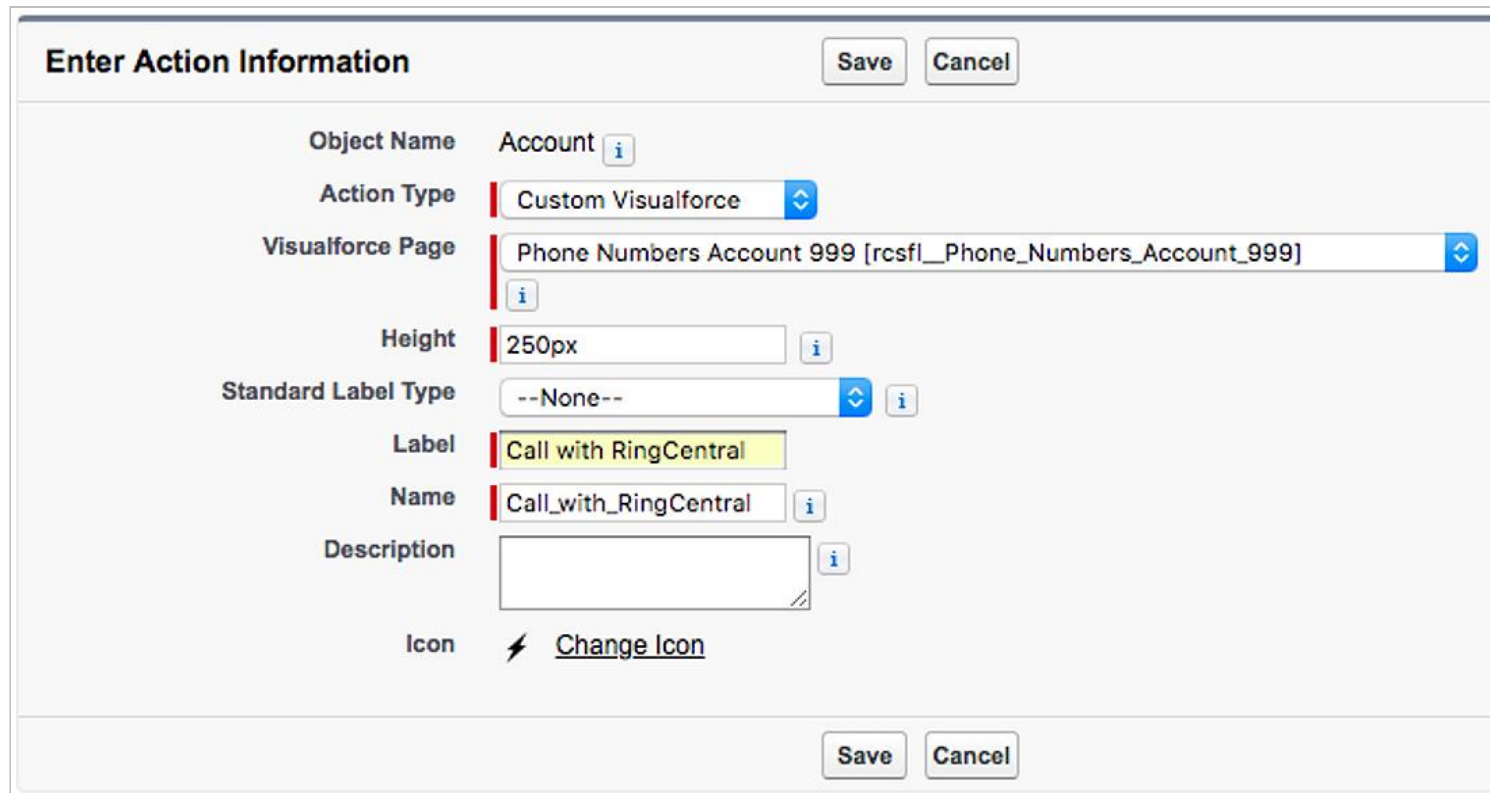
Action	Label	Name	Description	Type	Content Source	Icon	Overridden
Edit	Accounts Tab	Tab			Standard page		<input type="checkbox"/>
Edit	Add to Call List	CreateCallList			Standard page		<input type="checkbox"/>
Edit	Add to Campaign	AccountAddToCampaign			Standard page		<input type="checkbox"/>
Edit   Del	Billing	Billing		Detail Page Link	URL		<input type="checkbox"/>
Edit	 Call with RingCentral	Call_with_RingCentral		Custom Visualforce	Phone Numbers Account (Visualforce)		<input type="checkbox"/>
Edit   Del	 Call with RingCentral	Call_with_RingCentral		Custom Visualforce	Phone Numbers Account 999 (Visualforce)		<input type="checkbox"/>
Edit	Check for New Data	XClean			Standard page		<input type="checkbox"/>
Edit	Clean	ListClean			Standard page		<input type="checkbox"/>
Edit	Delete	Delete			Standard page		<input type="checkbox"/>
Edit	Discover Companies	DiscoveryGetAccountsAction			Standard page		<input type="checkbox"/>
Edit	Edit	Edit			Standard page		<input type="checkbox"/>
Edit	Get More Accounts	DataDotComGetAccountsMultiAddAction			Standard page		<input type="checkbox"/>
Edit	List	List			Standard page		<input type="checkbox"/>
Edit	New	New			Standard page		<input type="checkbox"/>
Edit	 SMS with RingCentral	SMS_with_RingCentral		Custom Visualforce	Phone Numbers SMS Account (Visualforce)		<input type="checkbox"/>
Edit   Del	 SMS with RingCentral	SMS_with_RingCentral		Custom Visualforce	Phone Numbers Account 999 (Visualforce)		<input type="checkbox"/>

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)




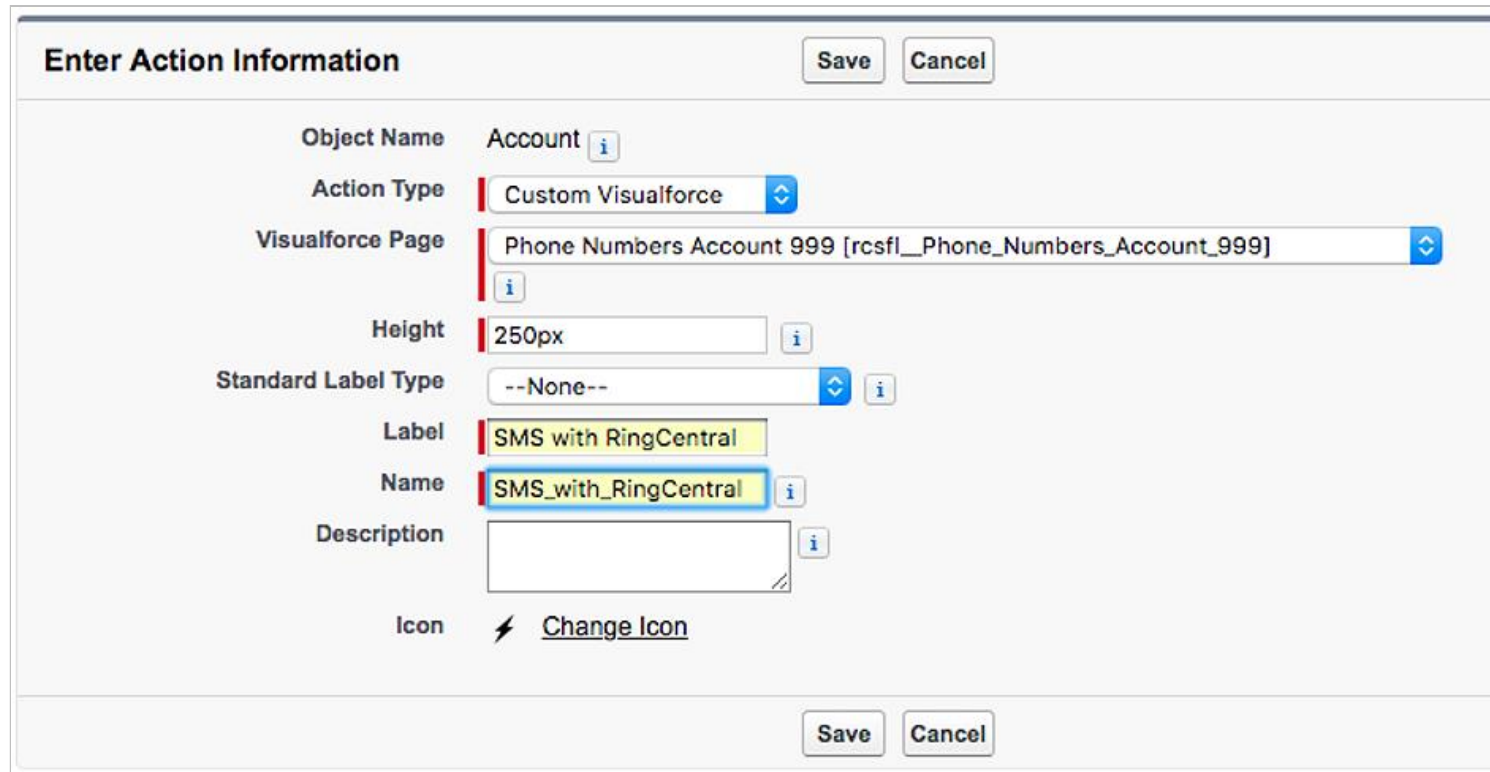
Enter Action Information		Save	Cancel
Object Name	Account <i>i</i>		
Action Type	Custom Visualforce		
Visualforce Page	Phone Numbers Account 999 [rcsfl_Phone_Numbers_Account_999] <i>i</i>		
Height	250px <i>i</i>		
Standard Label Type	--None-- <i>i</i>		
Label	Call with RingCentral		
Name	Call_with_RingCentral <i>i</i>		
Description	<div></div> <i>i</i>		
Icon	 <a href="#">Change Icon</a>		
		Save	Cancel

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)




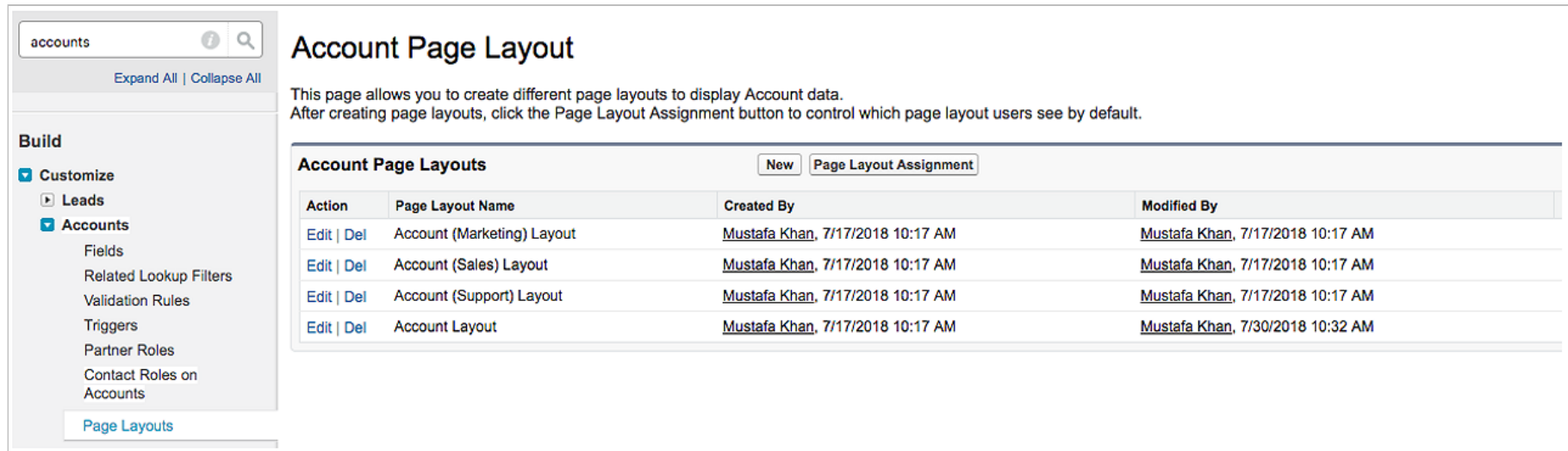
Enter Action Information		Save	Cancel
Object Name	Account <i>i</i>		
Action Type	Custom Visualforce <i>⌵</i>		
Visualforce Page	Phone Numbers Account 999 [rcsfl_Phone_Numbers_Account_999] <i>i</i> <i>⌵</i>		
Height	250px <i>i</i>		
Standard Label Type	--None-- <i>⌵</i> <i>i</i>		
Label	SMS with RingCentral		
Name	SMS_with_RingCentral <i>i</i>		
Description	<div></div> <i>i</i>		
Icon	 <a href="#">Change Icon</a>		
		Save	Cancel

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)



**Account Page Layout**

This page allows you to create different page layouts to display Account data.  
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Account Page Layouts			
<a href="#">New</a> <a href="#">Page Layout Assignment</a>			
Action	Page Layout Name	Created By	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	Account (Marketing) Layout	<a href="#">Mustafa Khan</a> , 7/17/2018 10:17 AM	<a href="#">Mustafa Khan</a> , 7/17/2018 10:17 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Account (Sales) Layout	<a href="#">Mustafa Khan</a> , 7/17/2018 10:17 AM	<a href="#">Mustafa Khan</a> , 7/17/2018 10:17 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Account (Support) Layout	<a href="#">Mustafa Khan</a> , 7/17/2018 10:17 AM	<a href="#">Mustafa Khan</a> , 7/17/2018 10:17 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Account Layout	<a href="#">Mustafa Khan</a> , 7/17/2018 10:17 AM	<a href="#">Mustafa Khan</a> , 7/30/2018 10:32 AM

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)

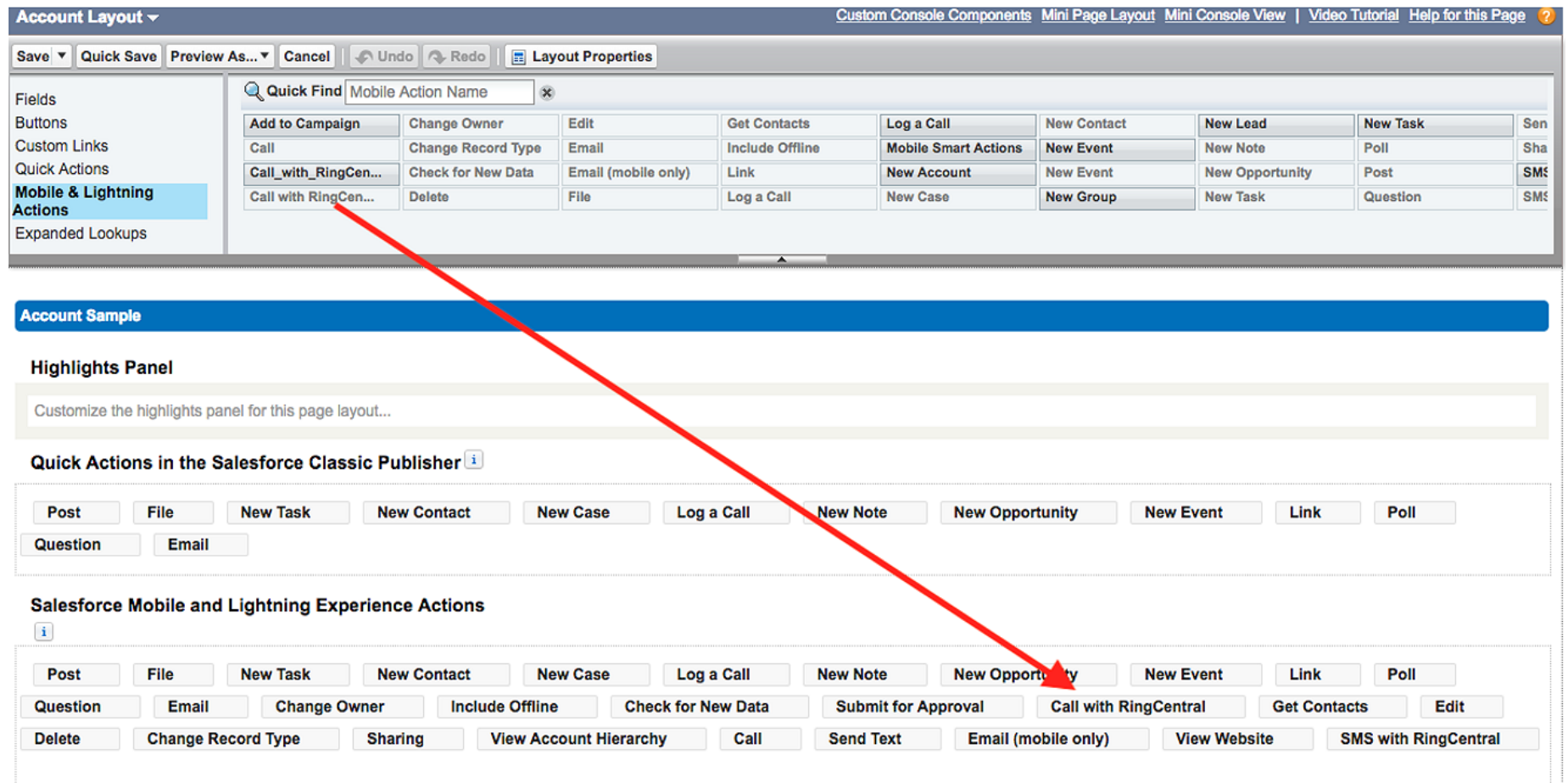


Figure 27

**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.