RingCentral for Salesforce Lightning

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.

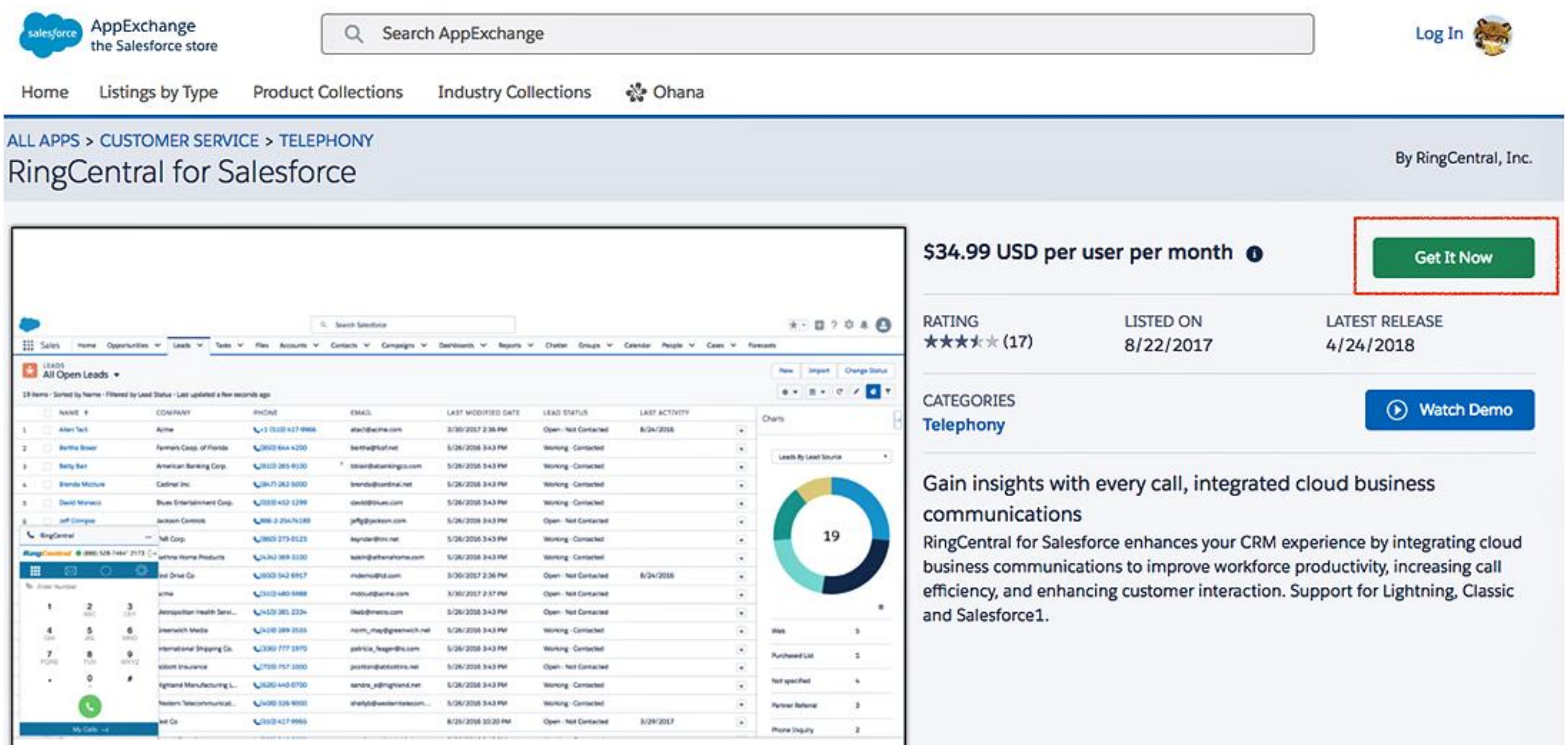


Figure 1

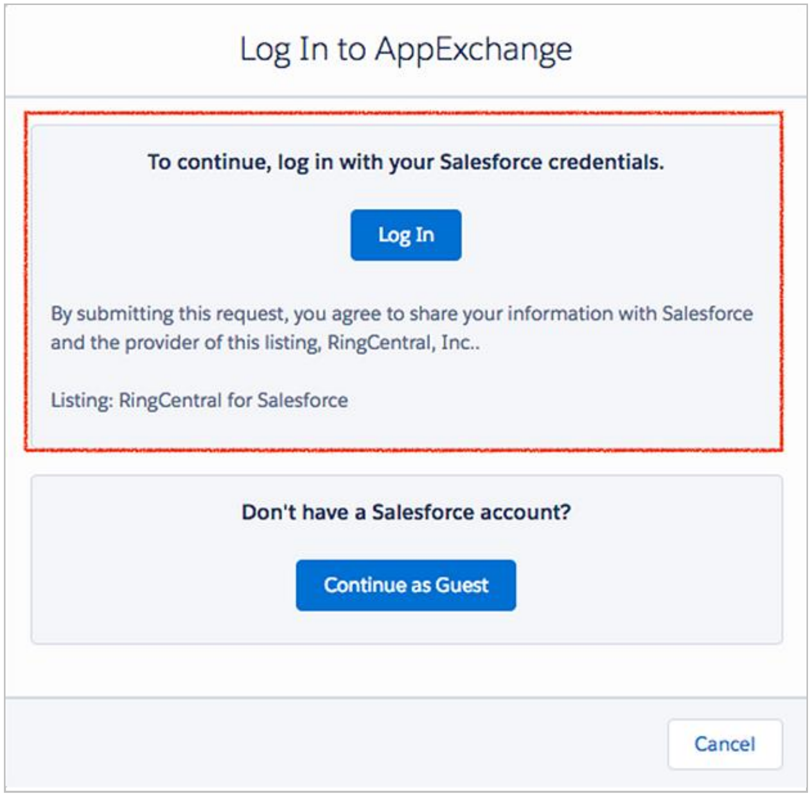


Figure 2

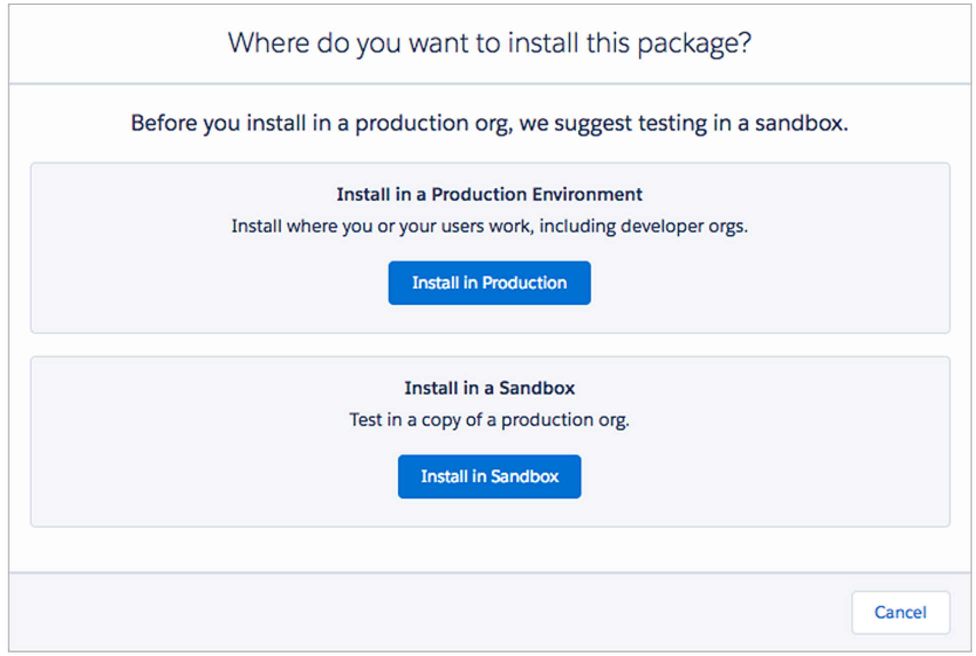


Figure 3

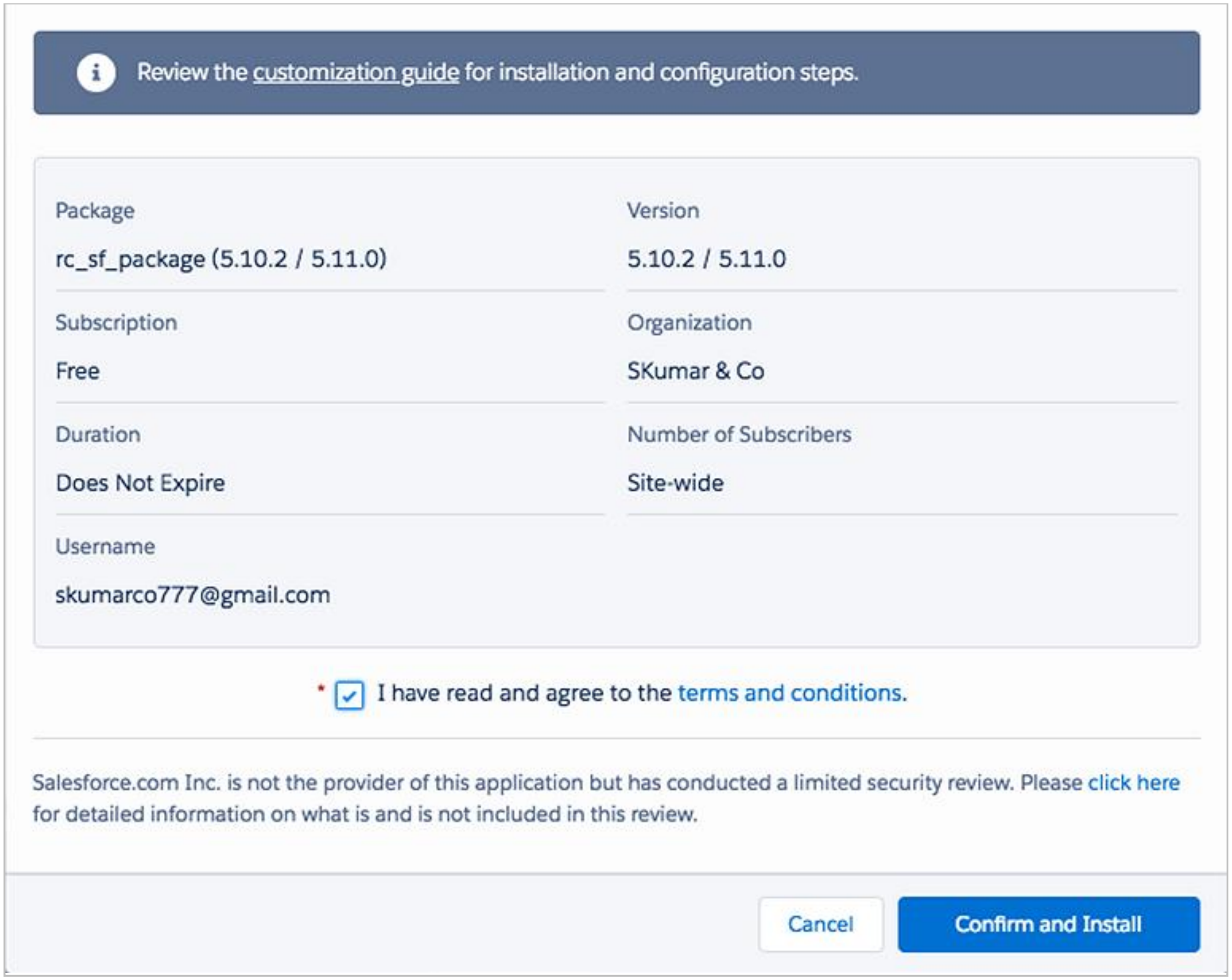


Figure 4

During installation, you will be asked what subset of users to whom you wish to grant access. It is generally recommended to select Grant Access to All Users, as this will ensure that Step 2 below will go smoothly; however, users will not actually have access to RingCentral for Salesforce until the administrator adds them to the Call Center as detailed below.

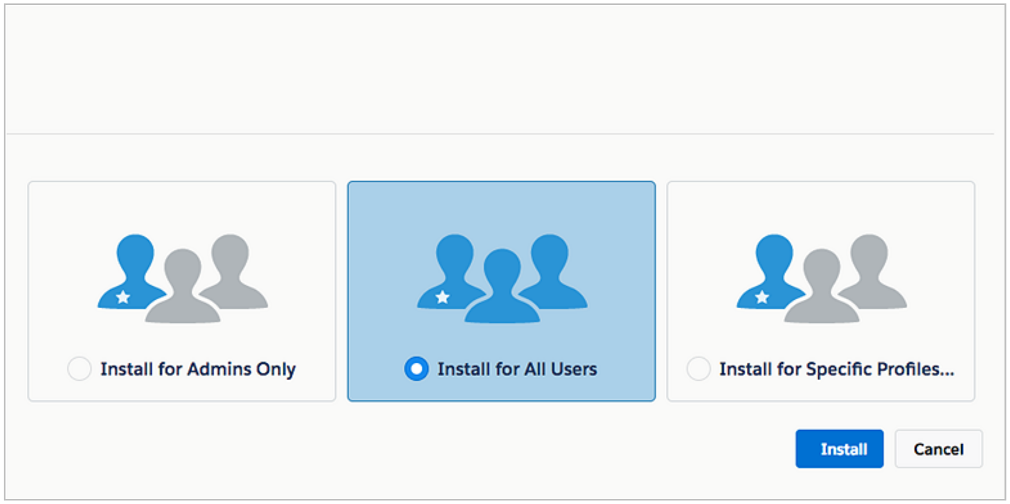


Figure 5

Wait for the installation to complete.

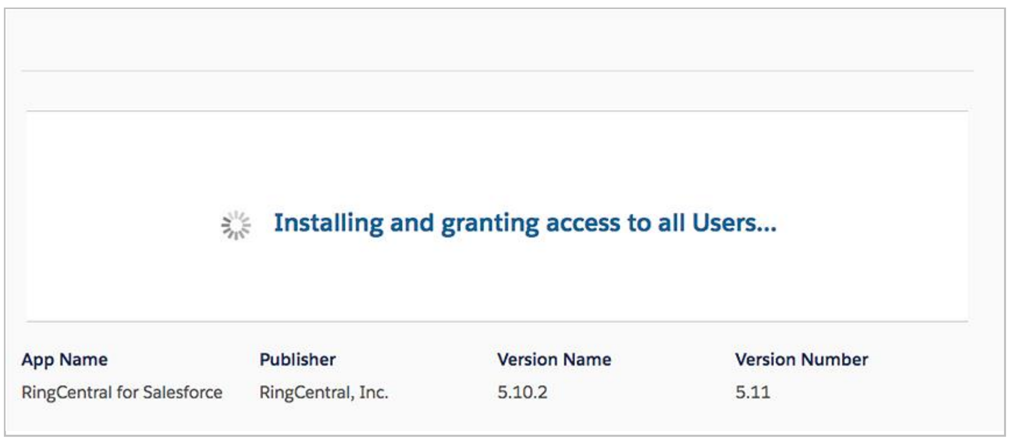


Figure 6

Click "Done" when the installation is complete.

Figure 7

After the installation the RingCentral for Salesforce application will be listed as "rc_sf_package" in the installed packages section within the Setup. (Next page)

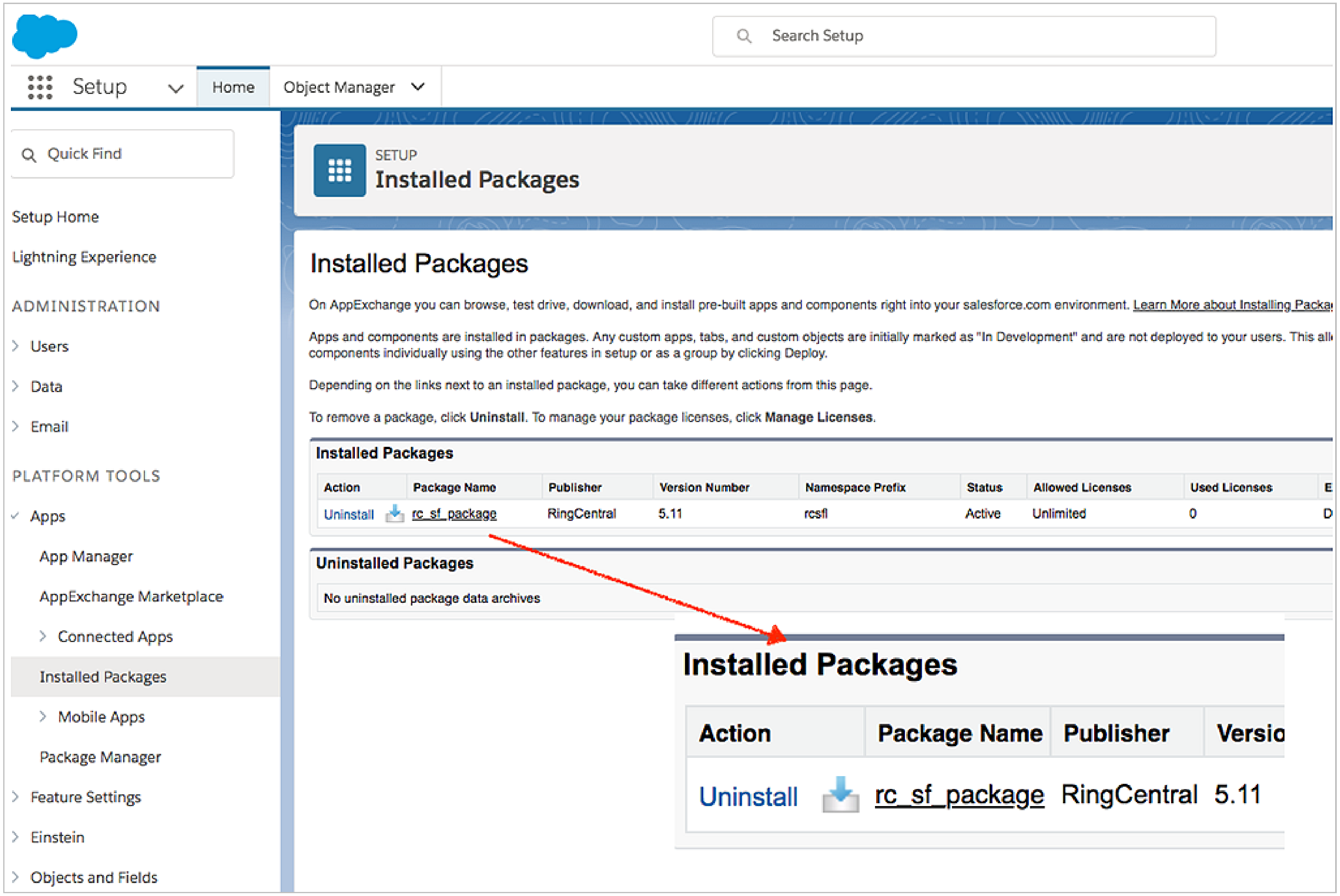

Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Lightning Experience
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Apps
App Manager
AppExchange Marketplace
Connected Apps
Installed Packages
Mobile Apps
Package Manager
Feature Settings
Einstein
Objects and Fields
SETUP
Installed Packages
Installed Packages
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 Packa
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 all
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
Uninstall
rc_sf_package
RingCentral
5.11
rcsfl
Active
Unlimited
0
Uninstalled Packages
No uninstalled package data archives
Installed Packages
Action
Package Name
Publisher
Versio
Uninstall
rc_sf_package
RingCentral
5.11

Figure 8

Step 2: Configure the Call Center

Go to **Setup > Visualforce Pages**, click preview icon next to the OpenCTIIndex999 page. (Figure 9)

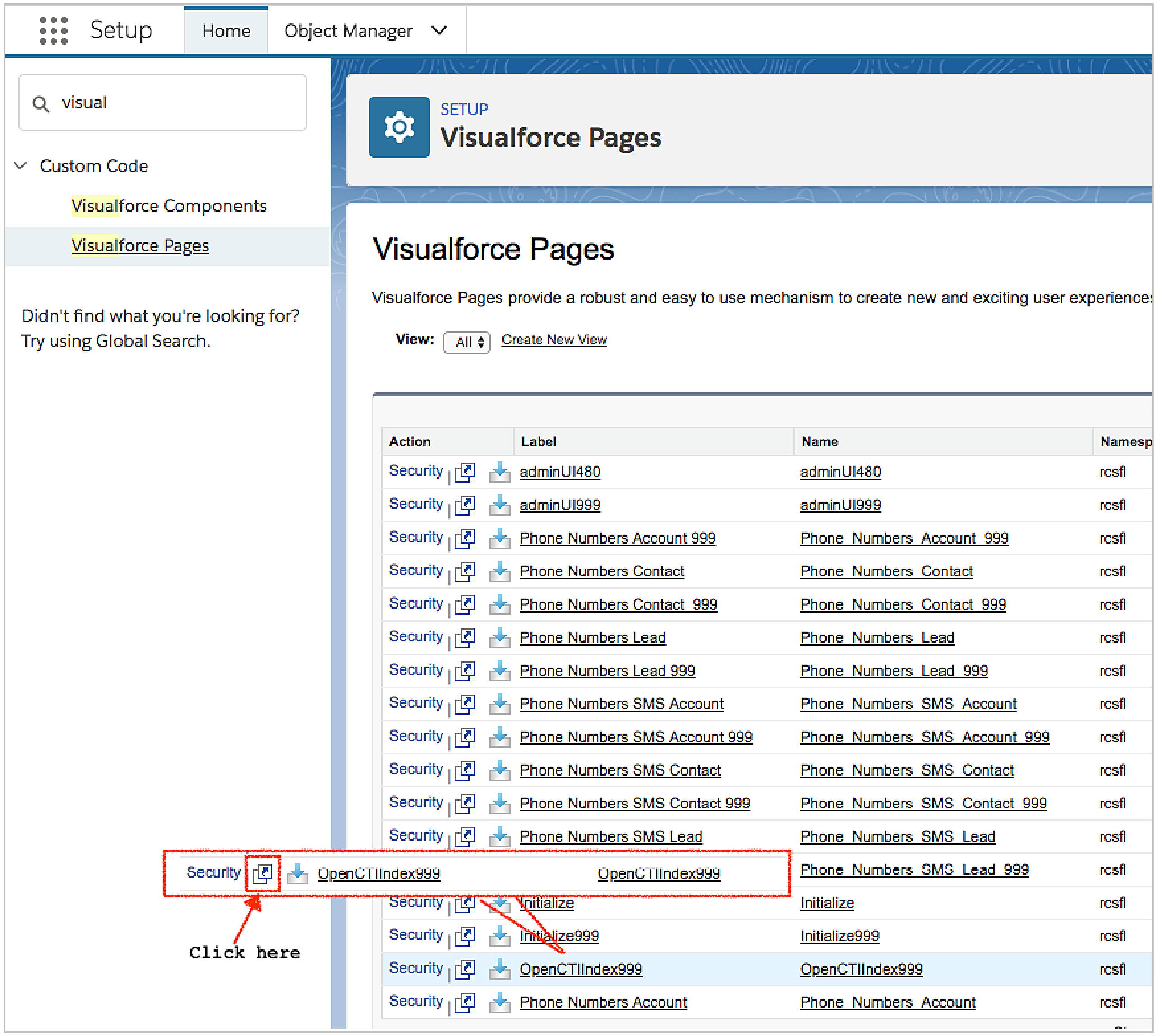


Figure 9

After the page opens in new tab or window, copy its URL (until # symbol). For example, if full URL is https://redabacus-dev-ed--rcsfl.na30.visual.force.com/apex/OpenCTIIndex999#/dialer, you should copy https://redabacus-dev-ed--rcsfl.na30.visual.force.com/apex/OpenCTIIndex999 from here. (Figure 10)

Figure 10

Close the tab and return to **Setup Home > Call Centers** and click “Continue”.

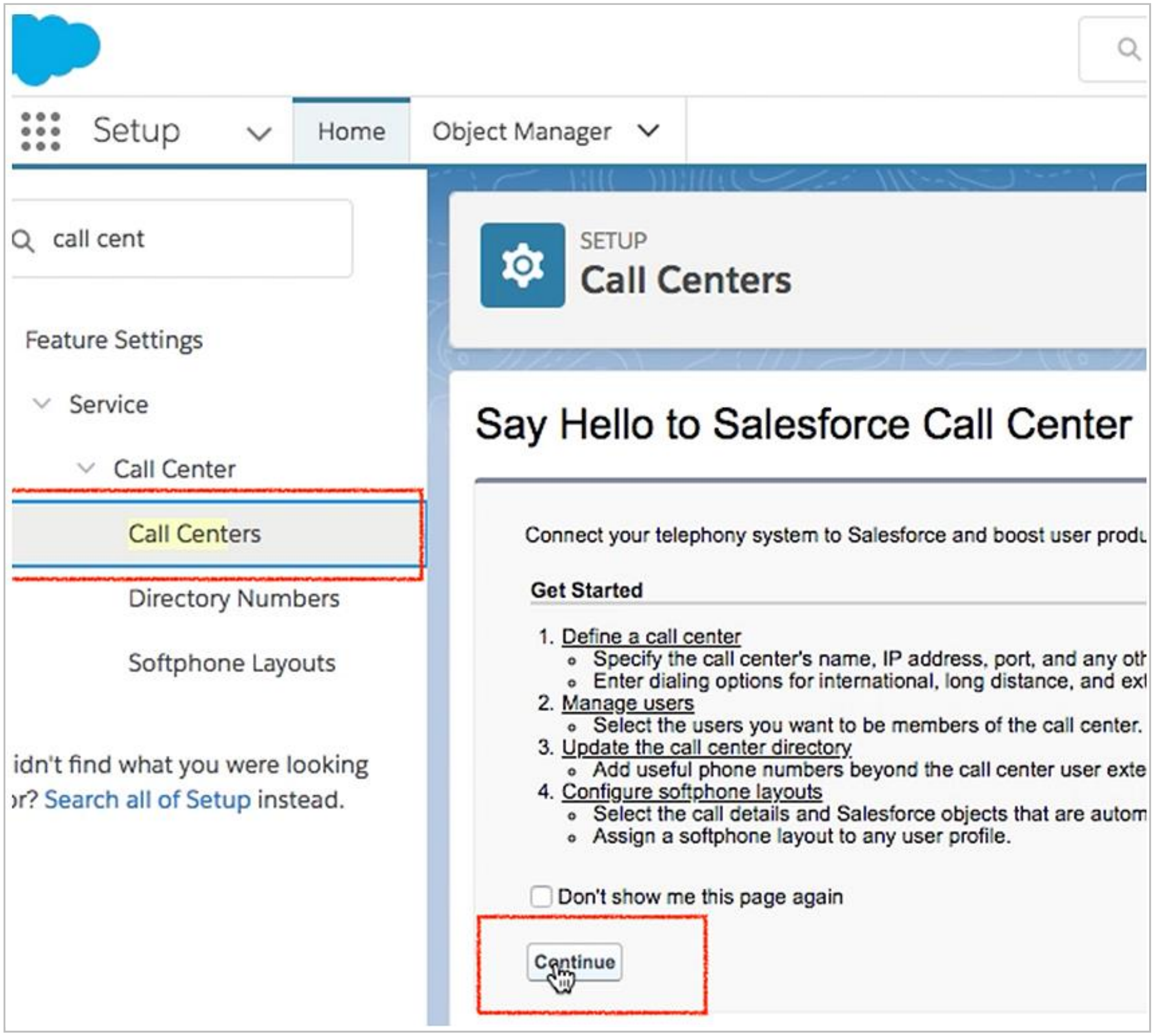


Figure 11

Select the call center Cloud Phone App and click **Edit**.

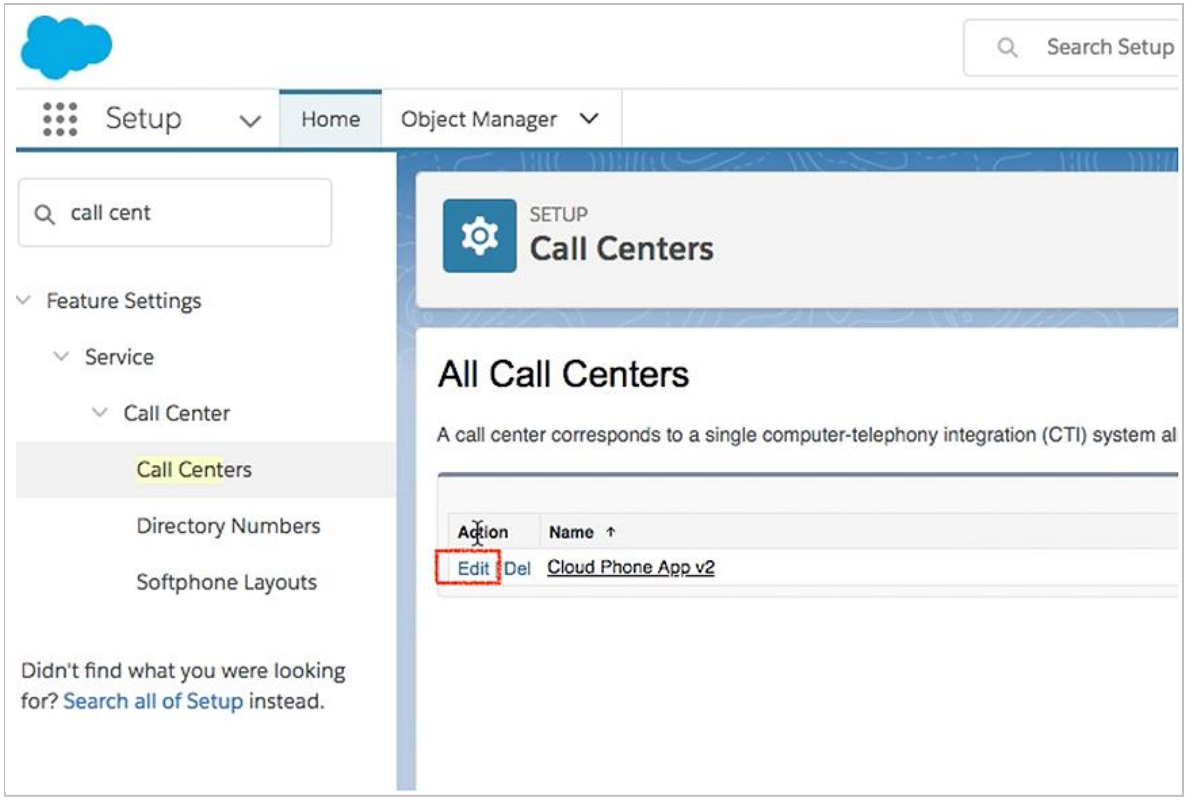


Figure 12

Paste the URL from OpenCTIIndex999 page to CTI Adapter URL; then click **Save**.

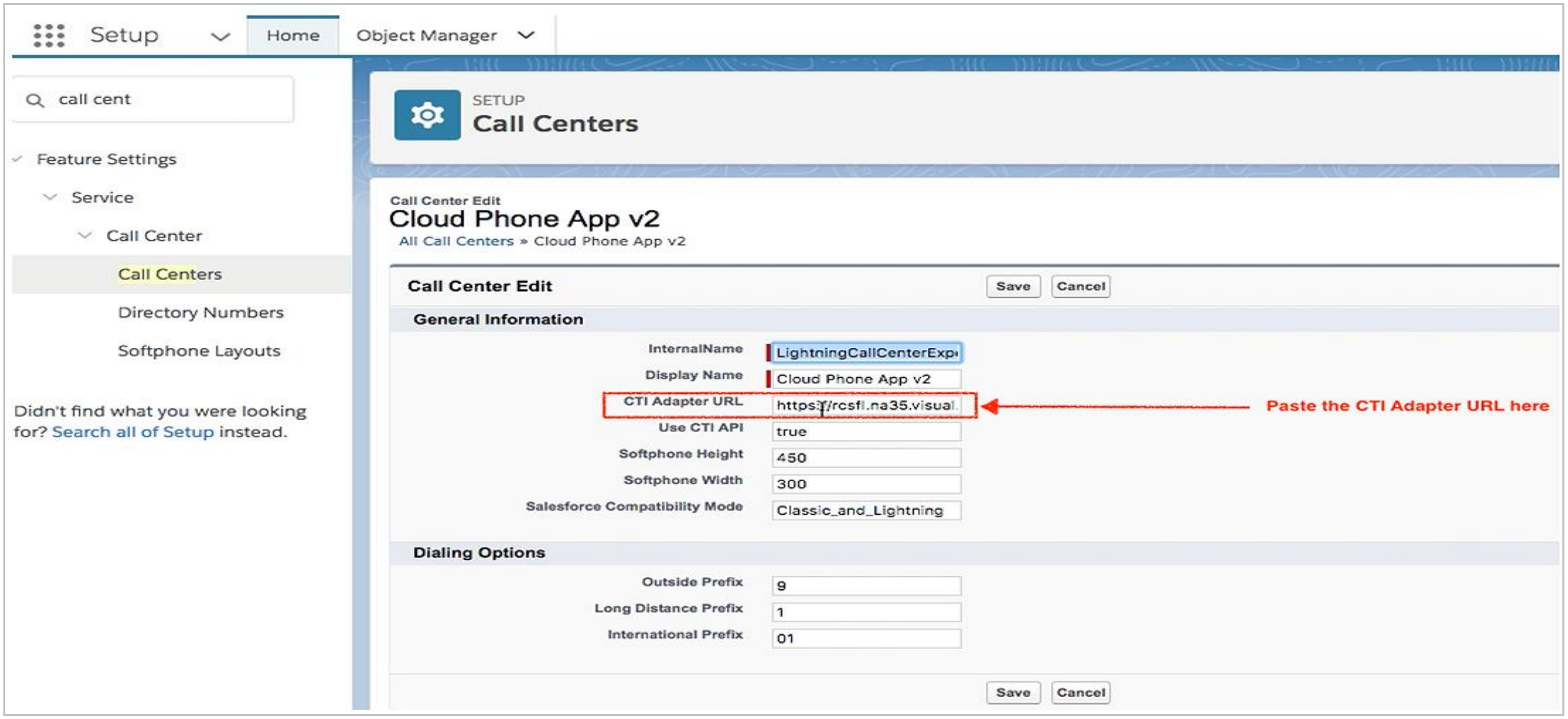


Figure 13

Note: 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 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. (Shown in Figure 14 below.)

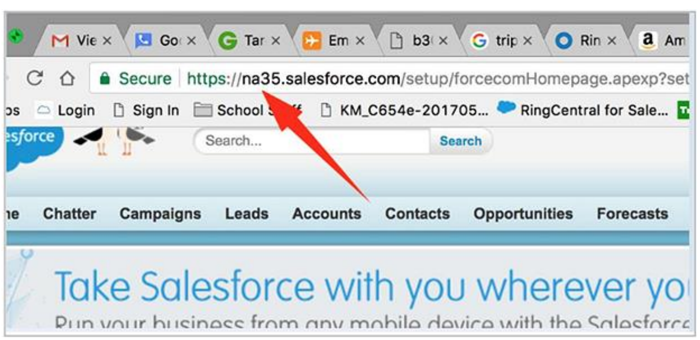


Figure 14

Step 3: Add Users to the Call Center

Go to Setup Home > Call Centers and click “Continue”.

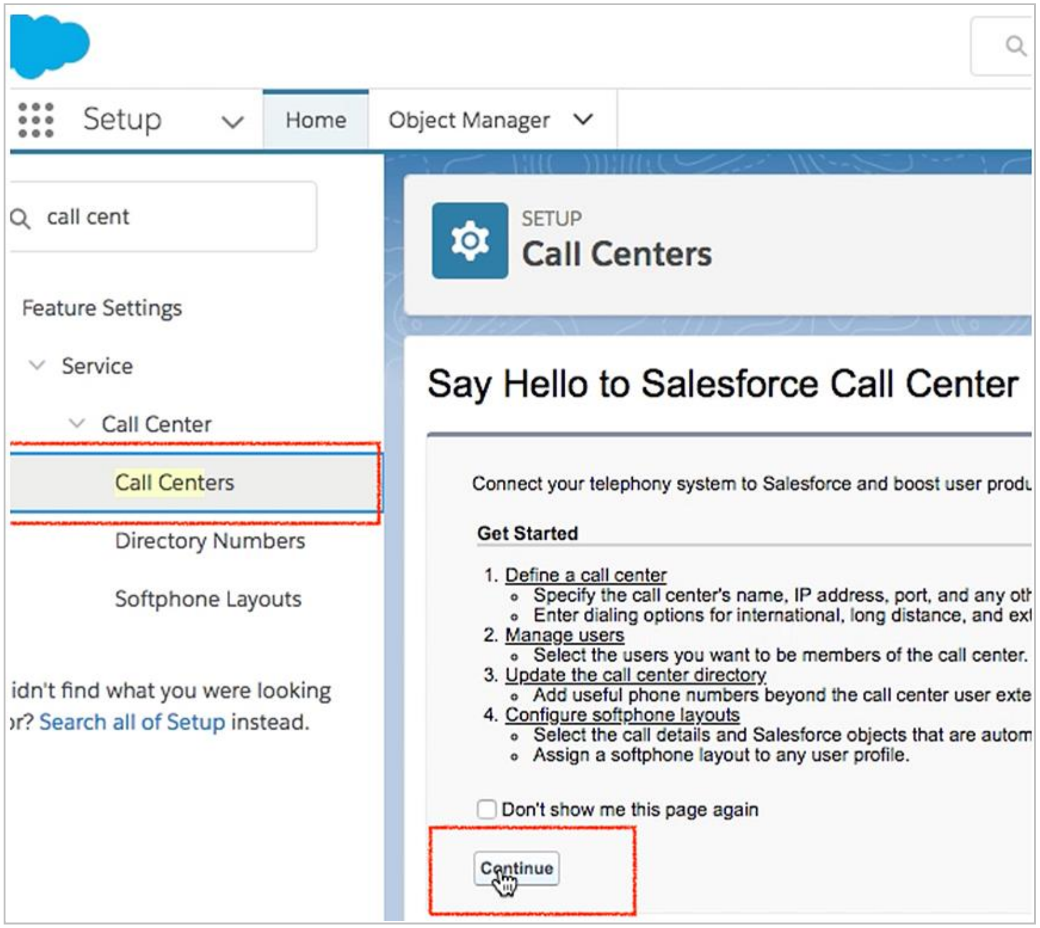


Figure 15

Select the call center and click on “Cloud Phone App v2”. Please Note the name could be different say “Cloud Phone App” depending on the Salesforce version.

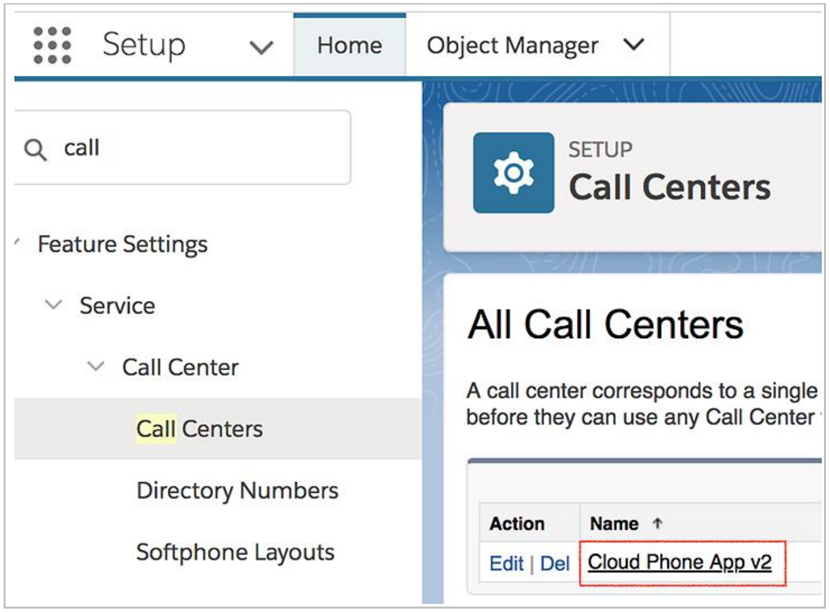


Figure 16

Upon clicking “Cloud Phone App v2” (Figure 17), you will see the Call Center details (Figure 18). It is not necessary to edit this Call Center definition. From here, you can add users to this Call Center using the “Manage Call Center Users” button, which opens the Manage Users screen (Figures 17, 18).

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 Cloud Phone App.

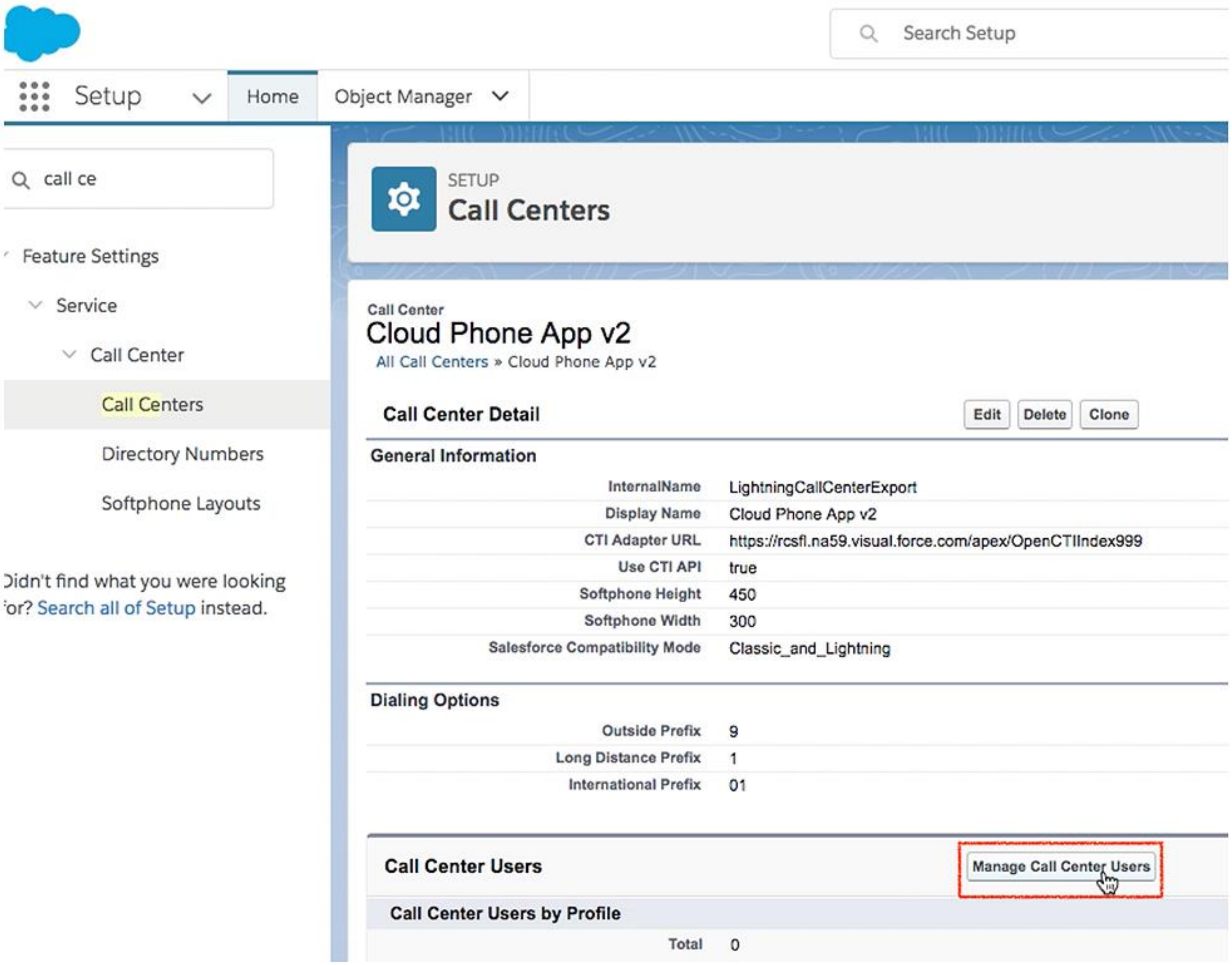

Search Setup
Setup
Home
Object Manager
call ce
Feature Settings
Service
Call Center
Call Centers
Directory Numbers
Softphone Layouts
Didn't find what you were looking for? Search all of Setup instead.
SETUP
Call Centers
Call Center
Cloud Phone App v2
All Call Centers » Cloud Phone App v2
Call Center Detail
Edit
Delete
Clone
General Information
InternalName LightningCallCenterExport
Display Name Cloud Phone App v2
CTI Adapter URL https://rcsfl.na59.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 17

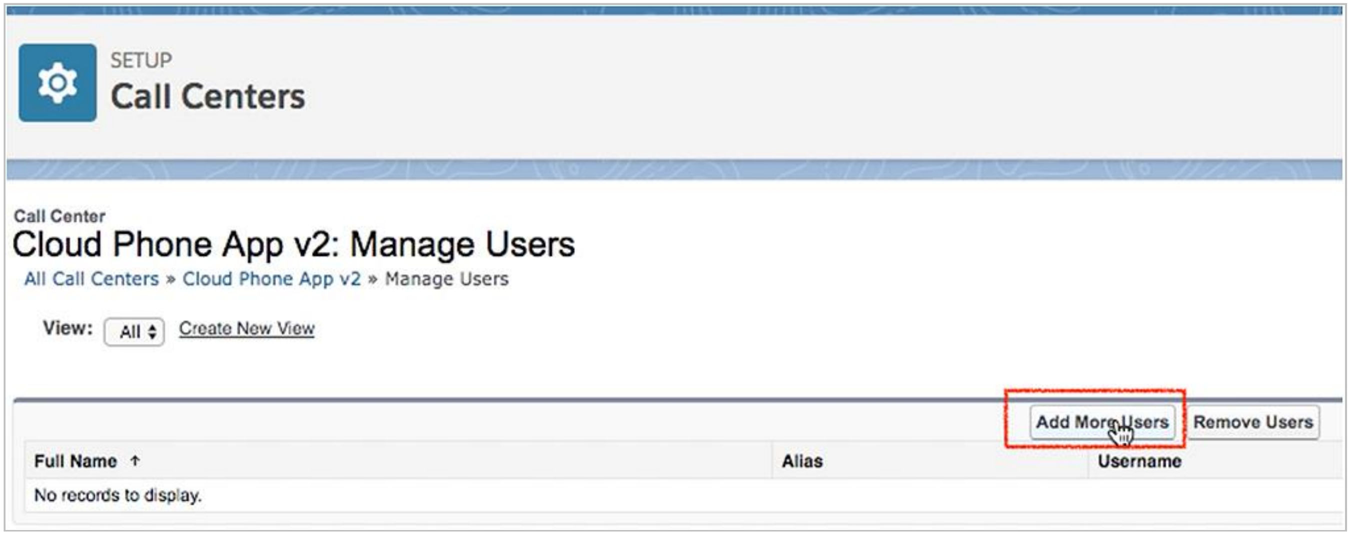


Figure 18

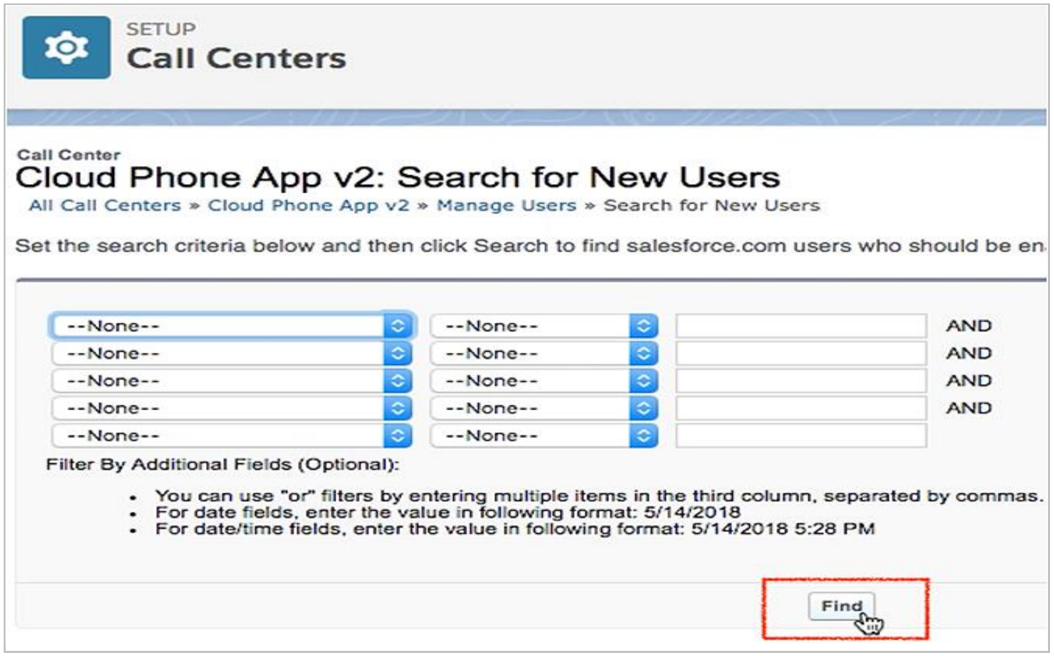


Figure 19

Select the users you wish to add to the call center.

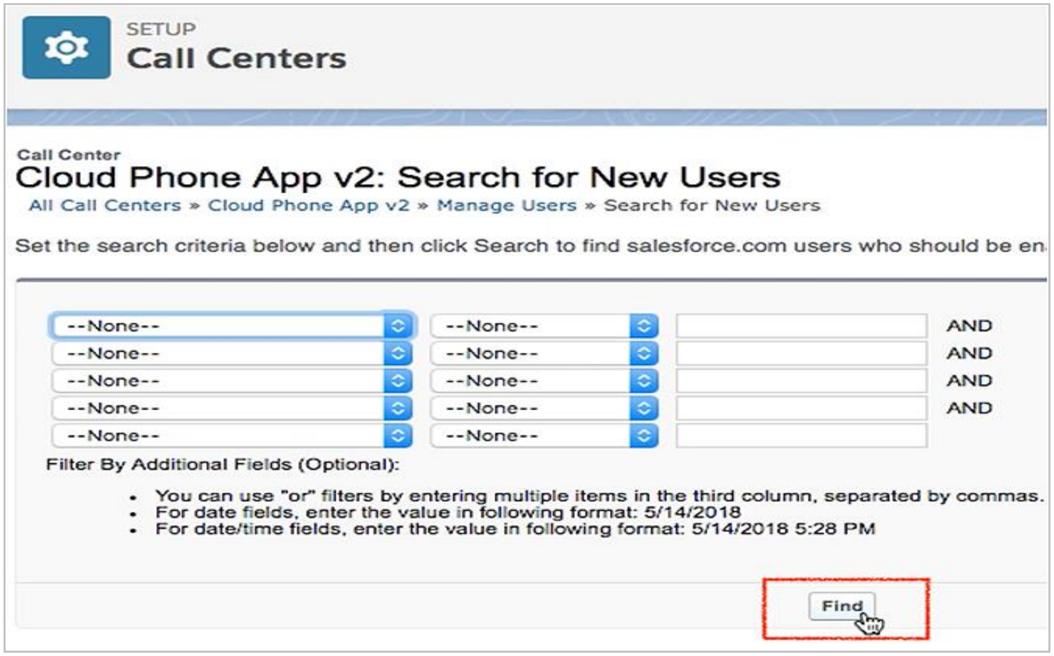


Figure 20

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 21)

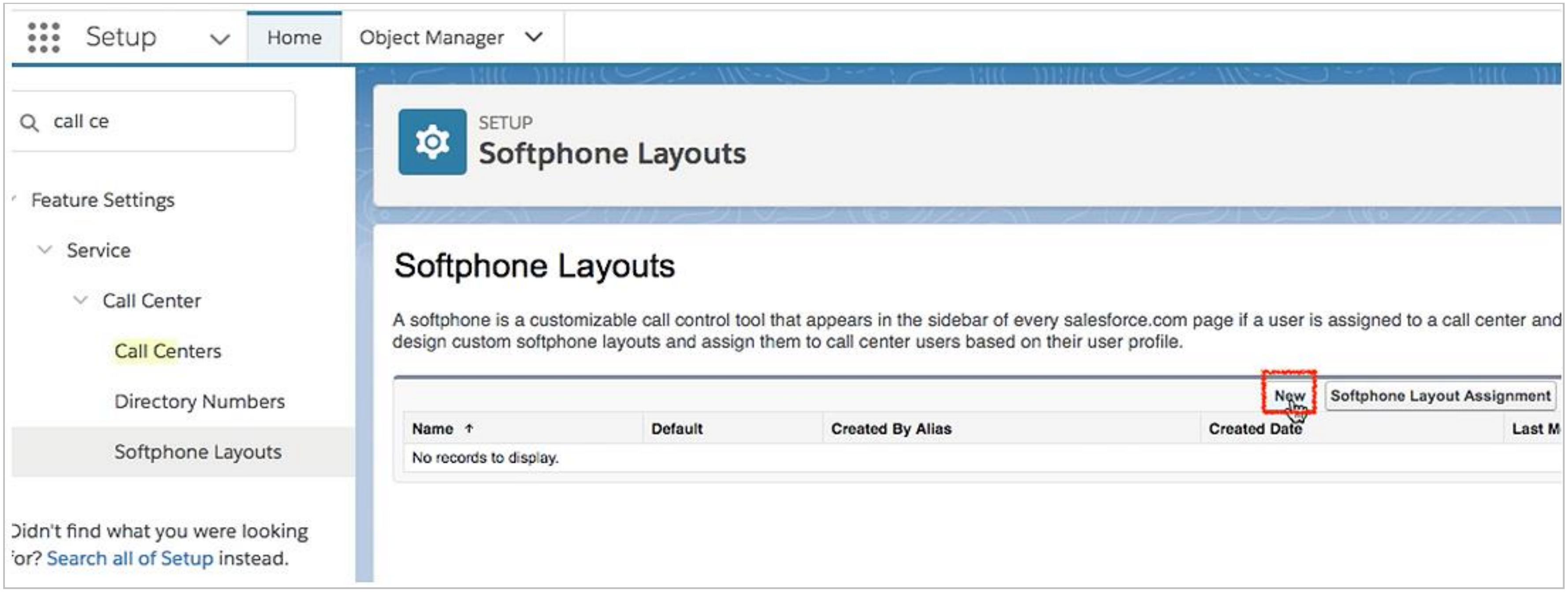


Figure 21

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 22 below)

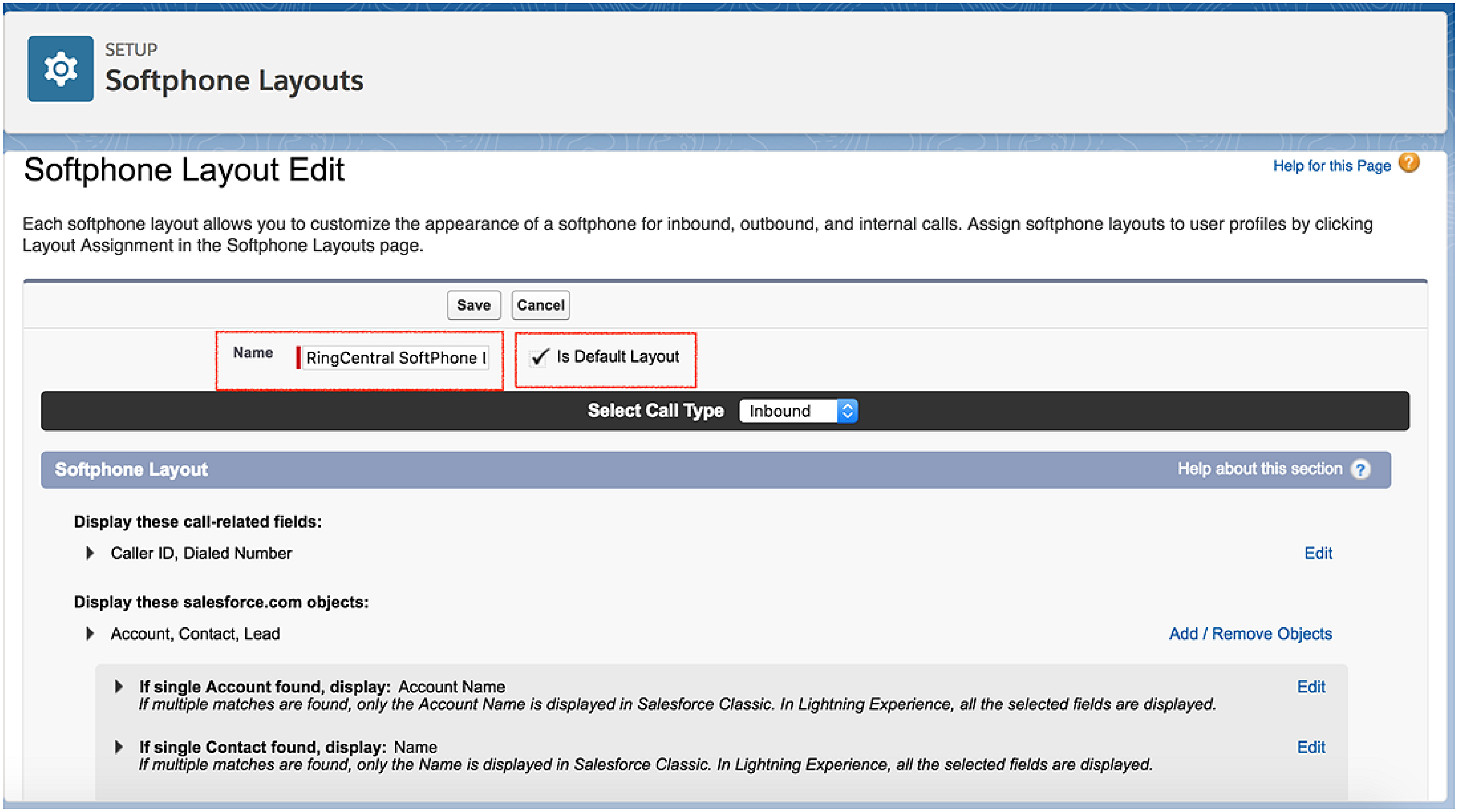

SETUP
Softphone Layouts
Softphone Layout Edit
Help for this Page
Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layouts to user profiles by clicking Layout Assignment in the Softphone Layouts page.
Save
Cancel
Name
RingCentral SoftPhone l
Is Default Layout
Select Call Type
Inbound
Softphone Layout
Help about this section
Display these call-related fields:
Caller ID, Dialed Number
Edit
Display these salesforce.com objects:
Account, Contact, Lead
Add / Remove Objects
If single Account found, display: Account Name
If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
Edit
If single Contact found, display: Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
Edit

Figure 22

Also select the other Softphone layout options.

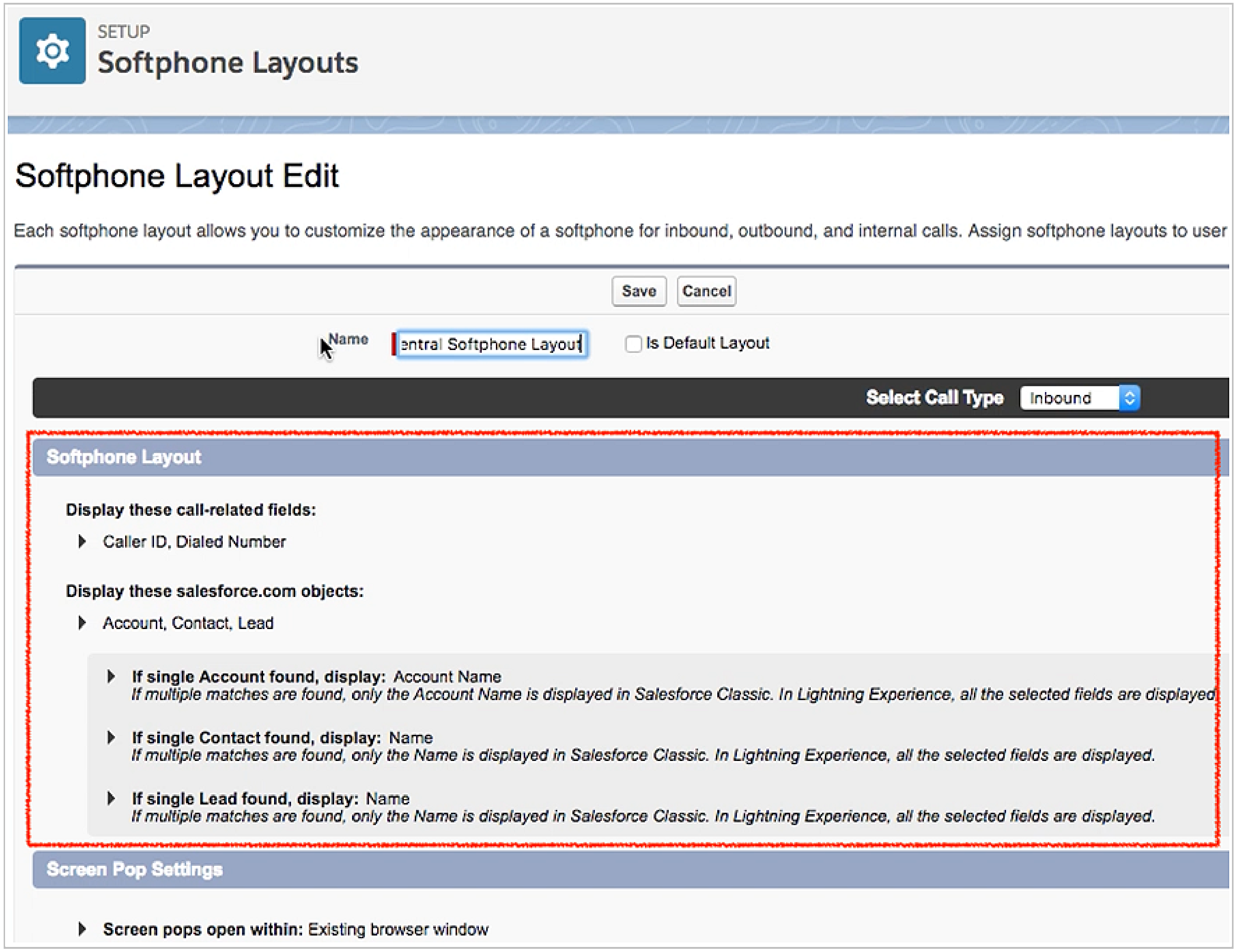


Figure 23

In Screen Pop Settings: (Figure 24)

- 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.

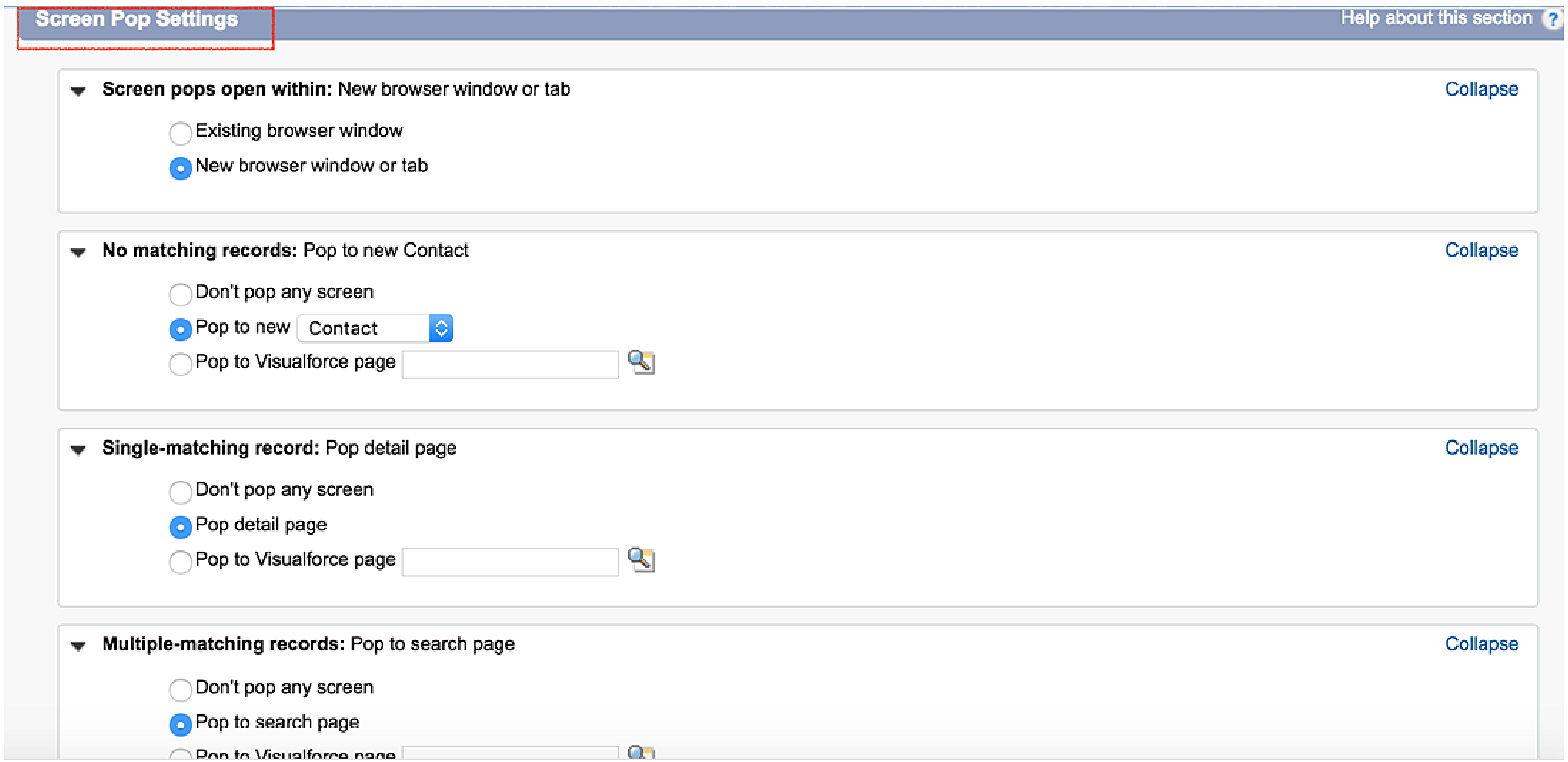


Figure 24

Click **Save** to save the Softphone layout

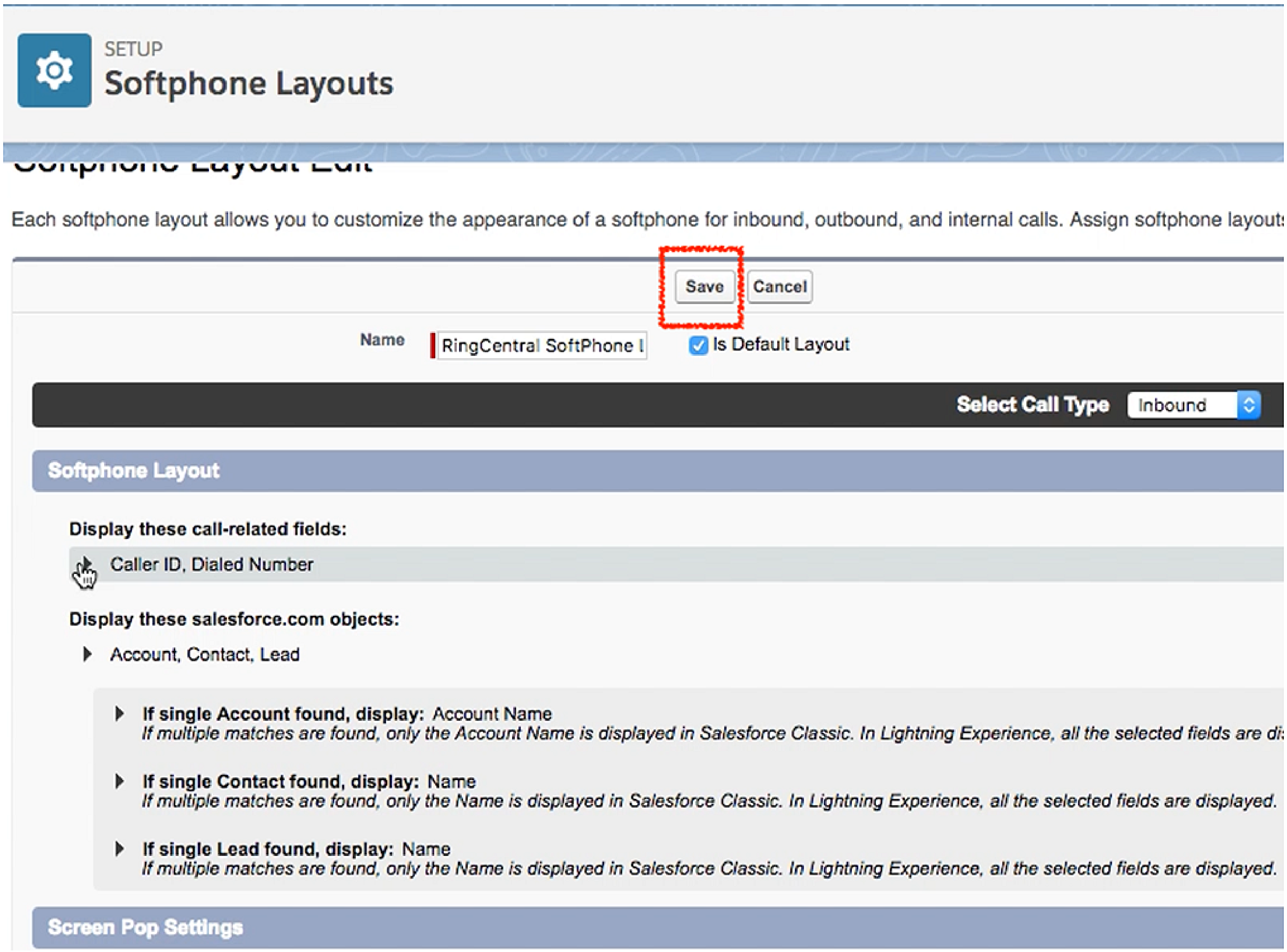

SETUP
Softphone Layouts
Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layouts
Save
Cancel
Name
RingCentral SoftPhone l
Is Default Layout
Select Call Type
Inbound
Softphone Layout
Display these call-related fields:
Caller ID, Dialed Number
Display these salesforce.com objects:
Account, Contact, Lead
If single Account found, display: Account Name
If single Contact found, display: Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
If single Lead found, display: Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
Screen Pop Settings

Figure 25

Step 2: Assign the Softphone Layout to Users

Go back to the Softphone Layouts page (Figures 26, 27) and click the Softphone Layout Assignment.

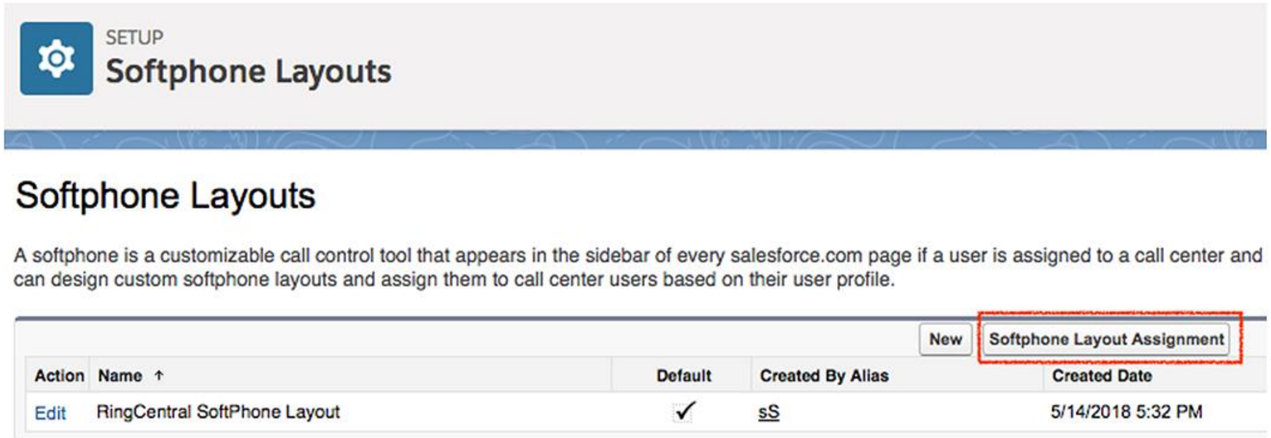


Figure 26

Assign the Softphone Layout to the relevant profiles.

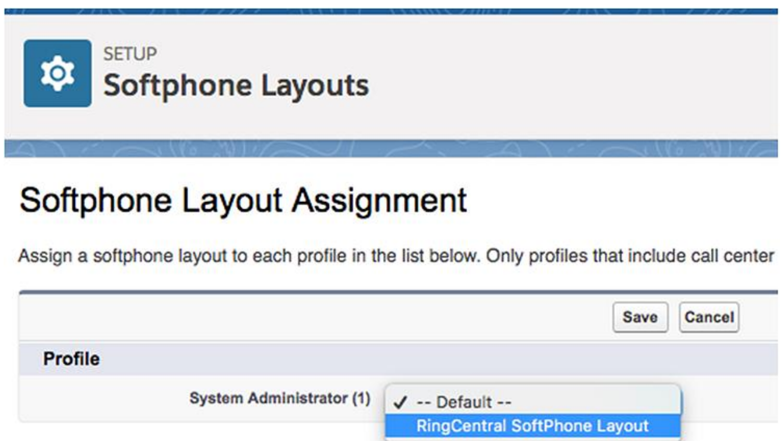


Figure 27

Note that according to the Open CTI Developer Guide https://developer.salesforce.com/docs/atlas.en-us.api_cti.meta/api_cti/sforce_api_cti_screenpop_lex.htm, “Experience doesn’t support the softphone layout field Screen pops open within when the value is New browser window or tab. In Lightning Experience, the default Open CTI for Lightning value is Existing browser window “.

Launch App in Lightning View

Now as your basic installation and configuration is complete it's time to launch the RingCentral for Lightning app. The App can be accessed from App Launcher.

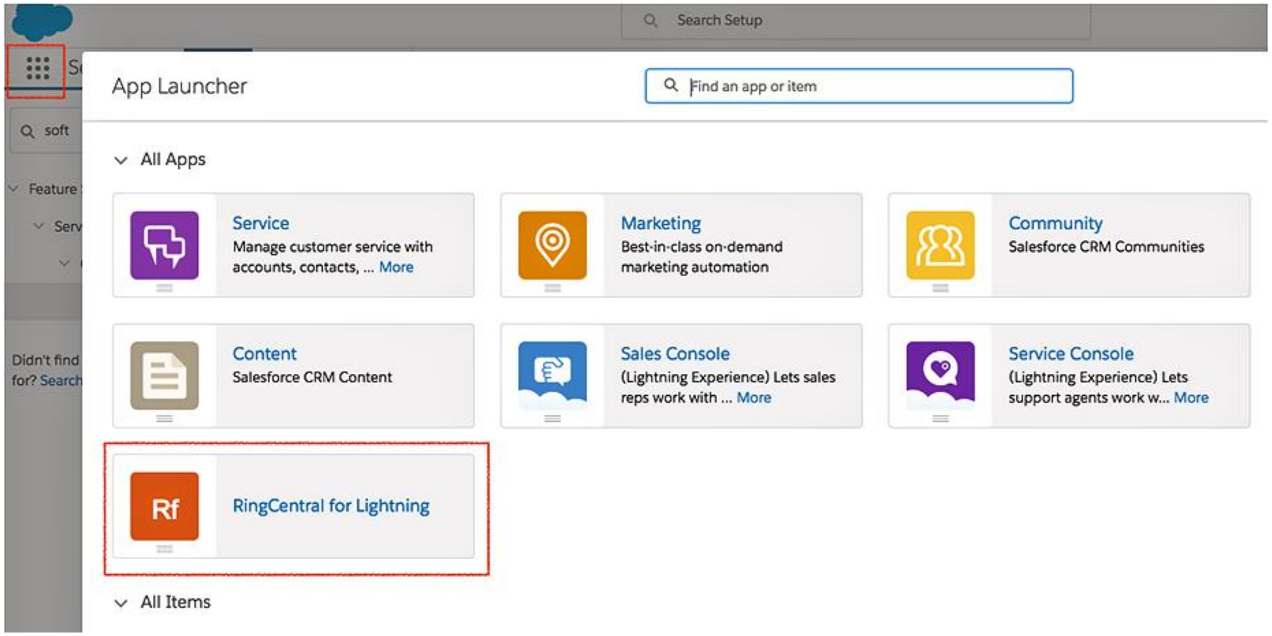


Figure 28

Before Launching the RingCentral for Lightning app Logout and re-login.

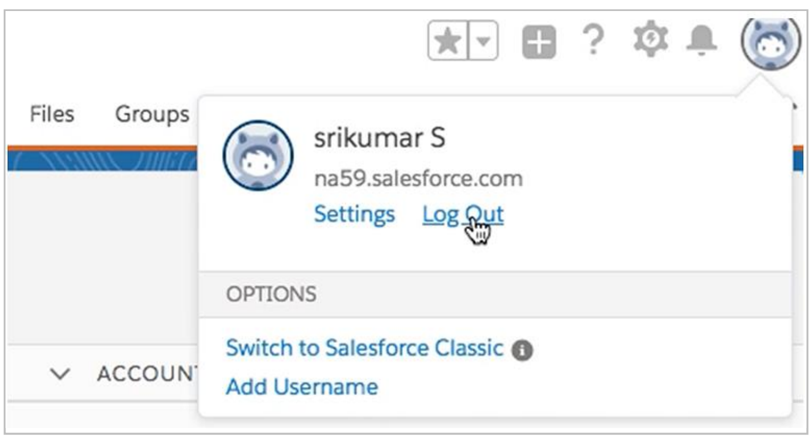


Figure 29

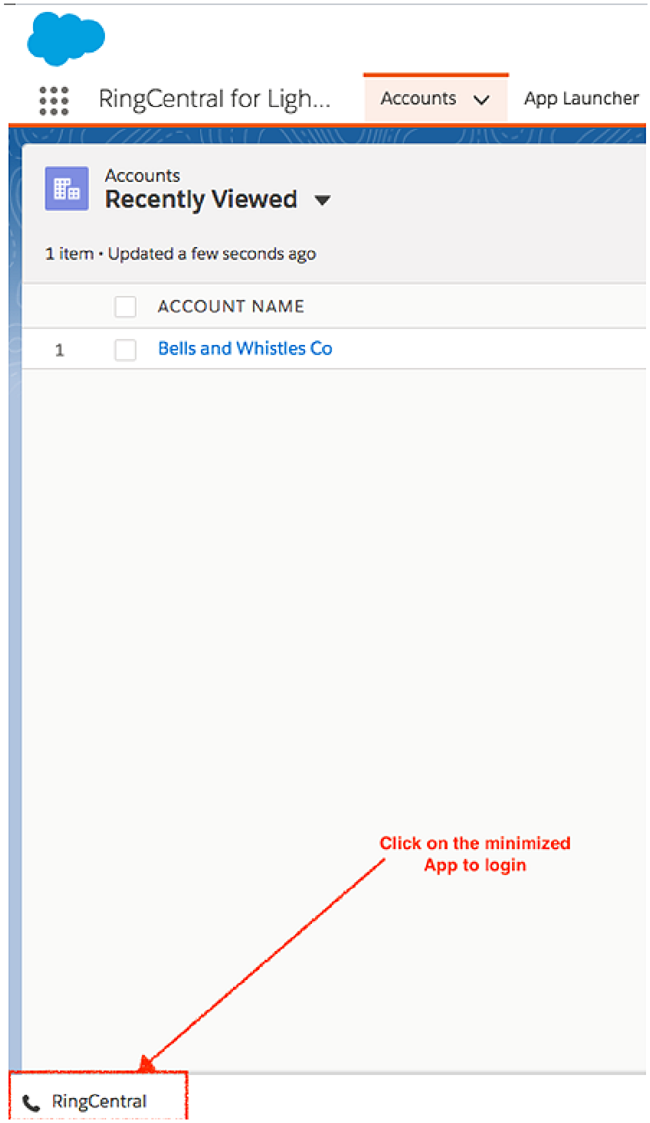


Figure 30

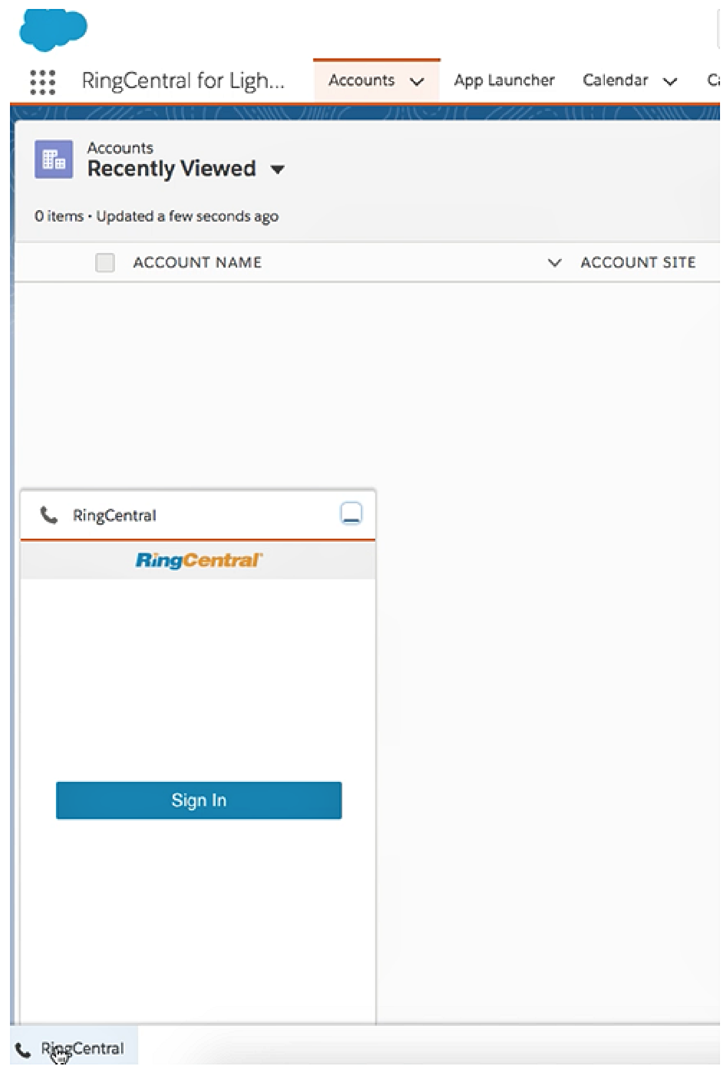


Figure 31

Click the button and you'll see the RingCentral app. After Sign In, configure the outbound dialing option in setup. Refer to Figures 32 and 33 on the next page for instructions.

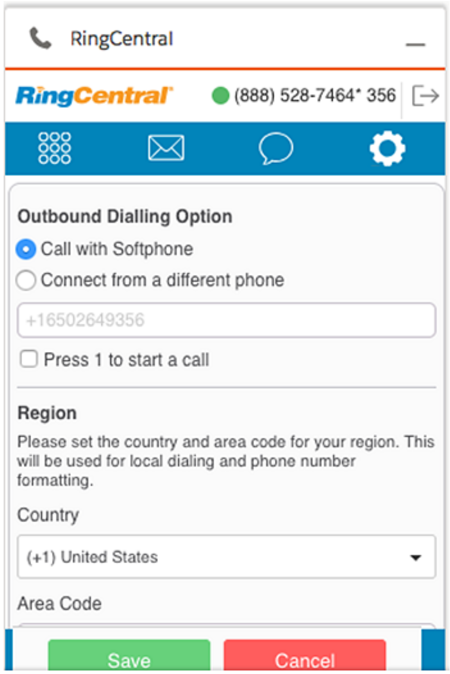
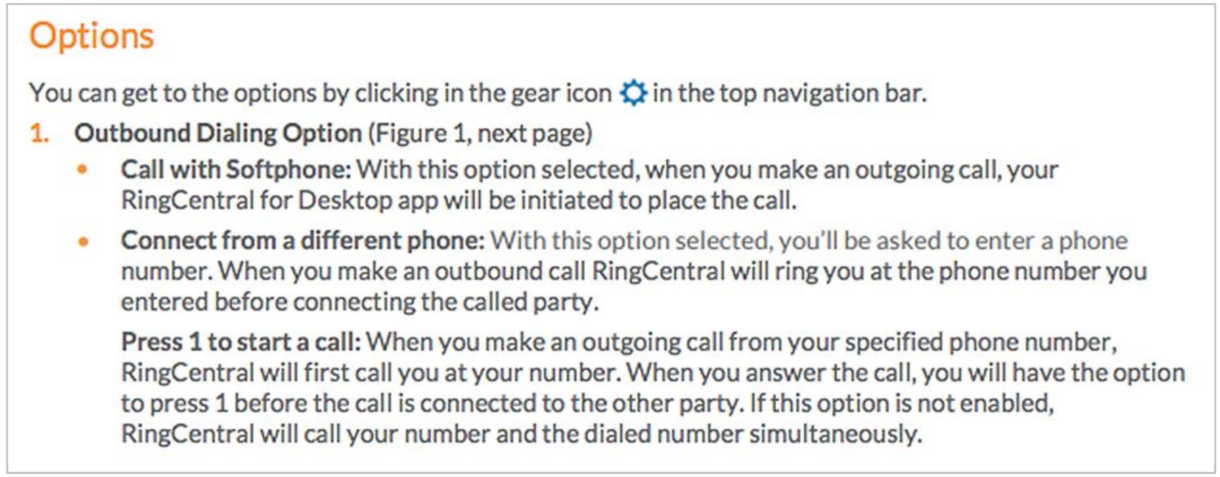


Figure 32



Options

You can get to the options by clicking in the gear icon in the top navigation bar.

1. **Outbound Dialing Option** (Figure 1, next page)
   - **Call with Softphone:** With this option selected, when you make an outgoing call, your RingCentral for Desktop app will be initiated to place the call.
   - **Connect from a different phone:** With this option selected, you'll be asked to enter a phone number. When you make an outbound call RingCentral will ring you at the phone number you entered before connecting the called party.

     Press 1 to start a call: When you make an outgoing call from your specified phone number, RingCentral will first call you at your number. When you answer the call, you will have the option to press 1 before the call is connected to the other party. If this option is not enabled, RingCentral will call your number and the dialed number simultaneously.

Figure 33

Note: Setup can be configured by each user based on their preference. Refer to the *RingCentral for Salesforce User Guide* in the AppExchange listing.

Add Open CTI Softphone to Your Lightning App

You can add CTI to any of your Lighting apps. Navigate to **All Setup** > **Apps** > **App Manager.**

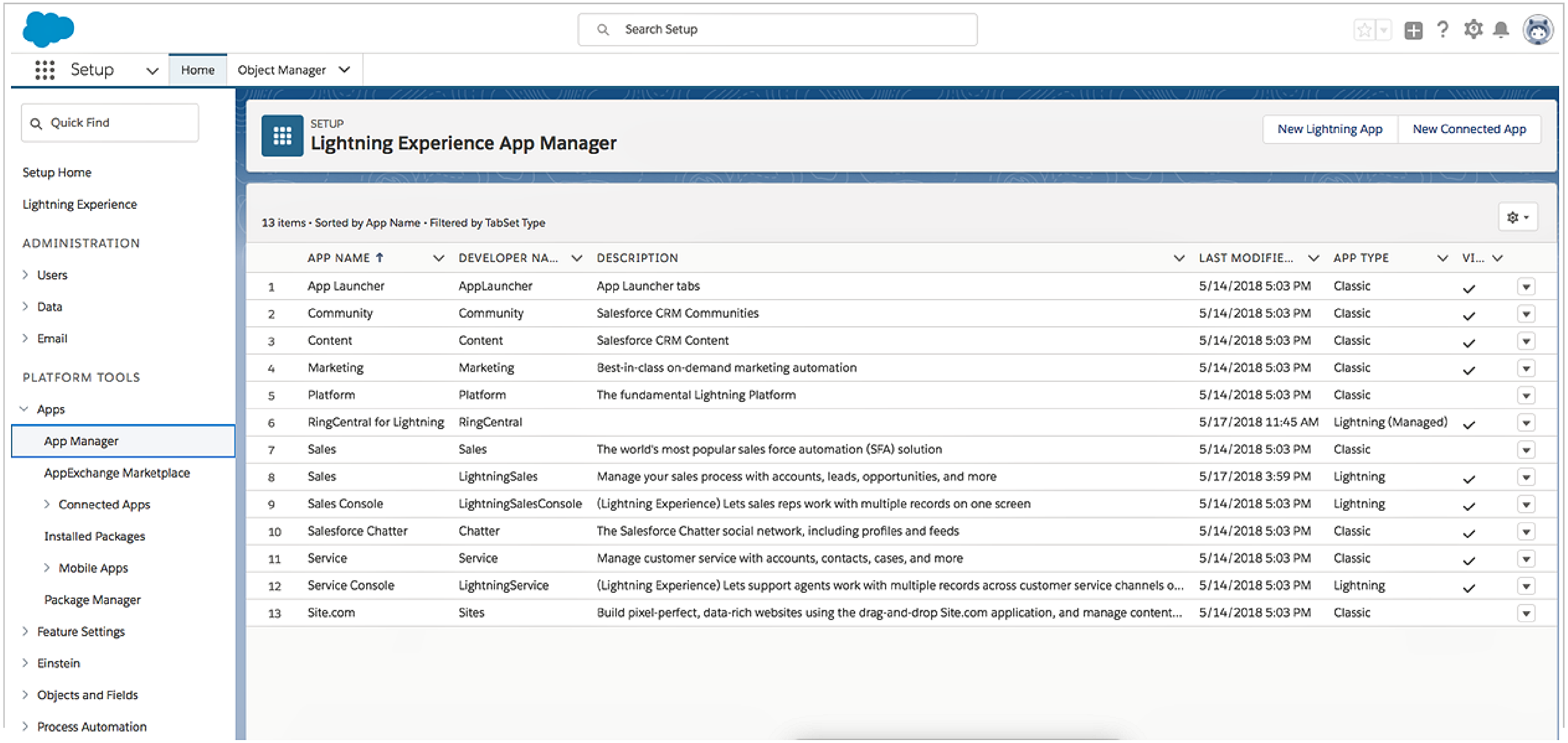


Figure 34

Select the Lightning app you wish to add the RingCentral app, and click **Edit.**

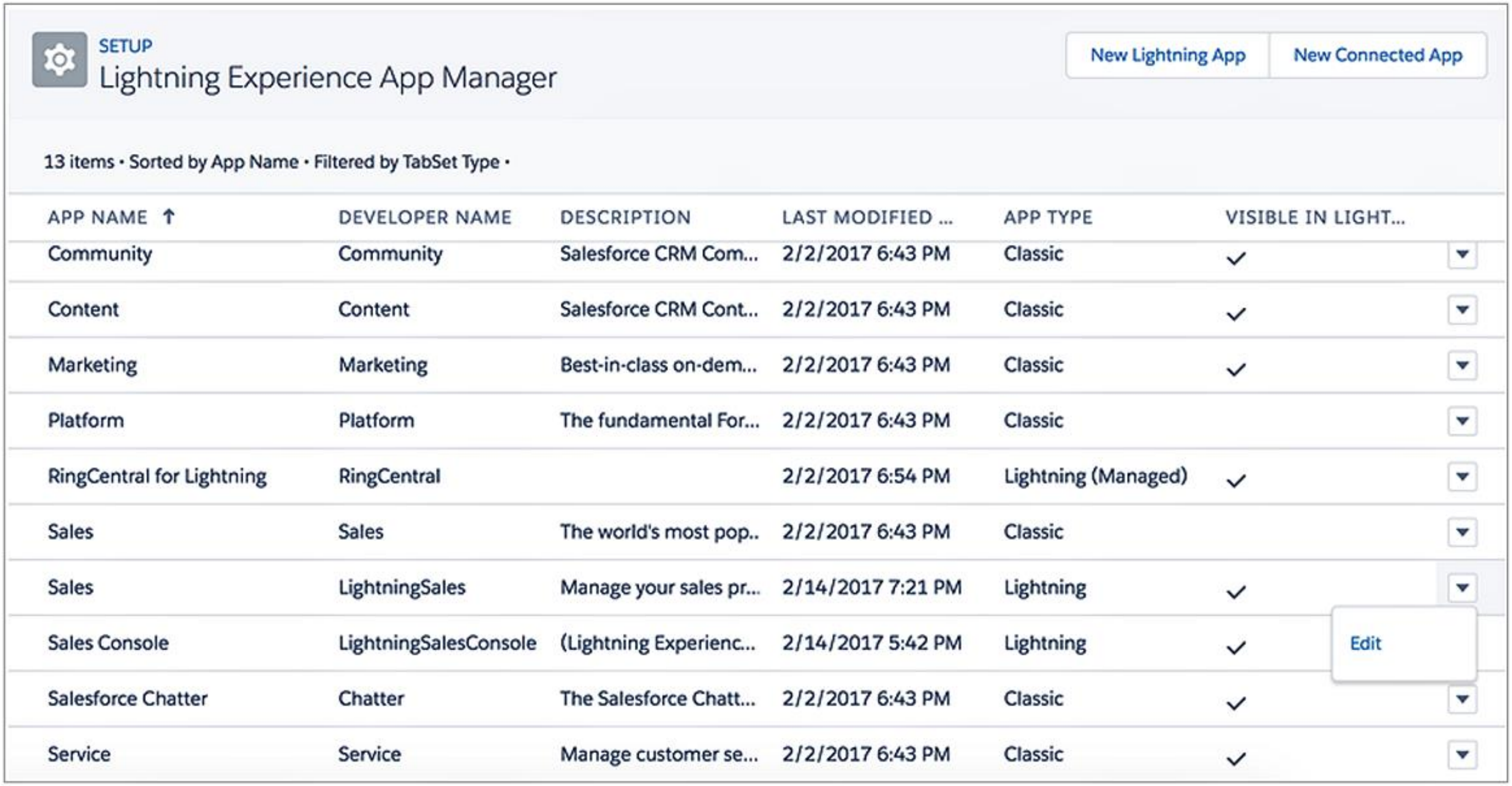


Figure 35

Open the **Utility Bar** tab and click **Add.**

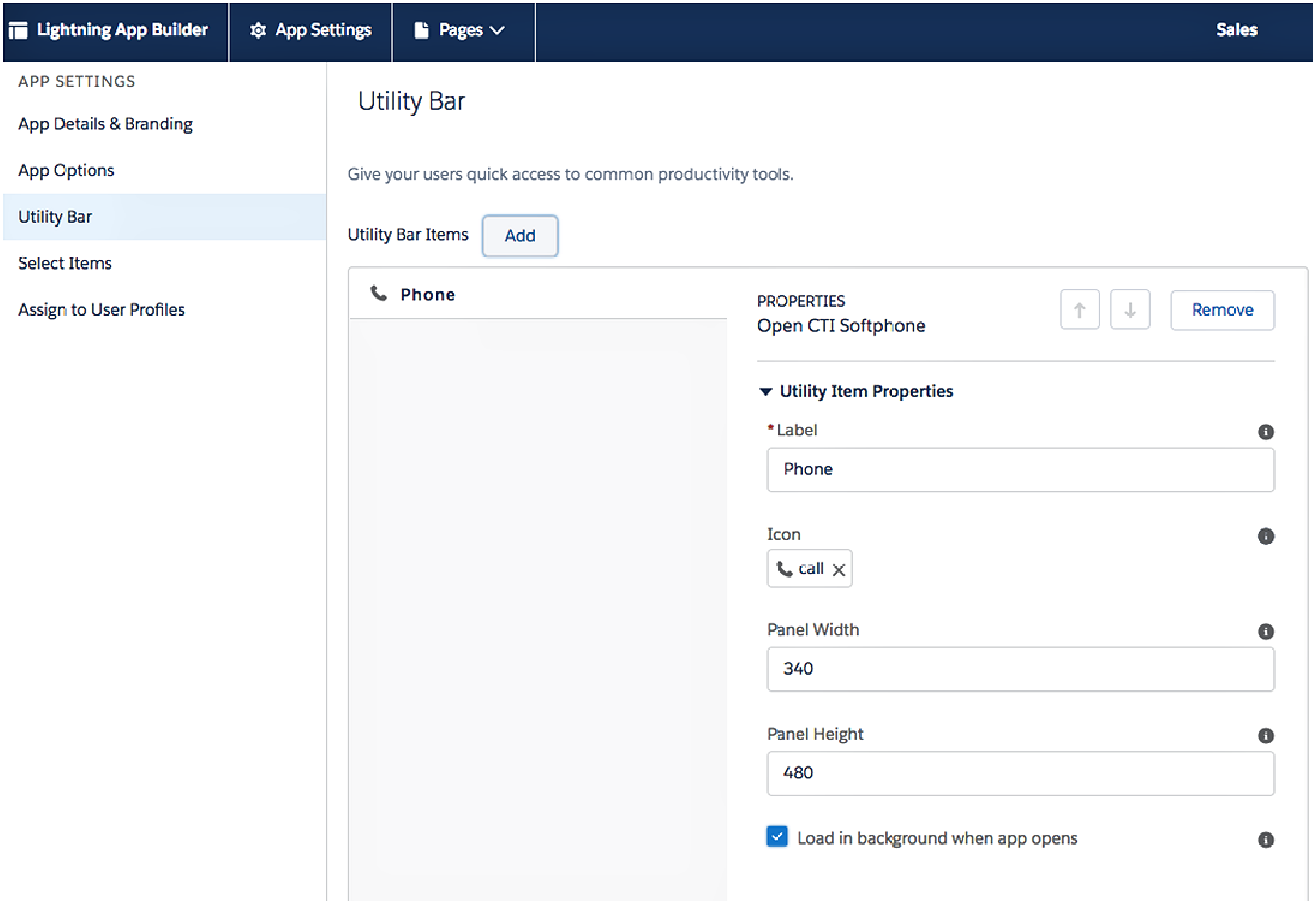


Figure 36

Select **Open CTI Softphone** from the available list and click it.

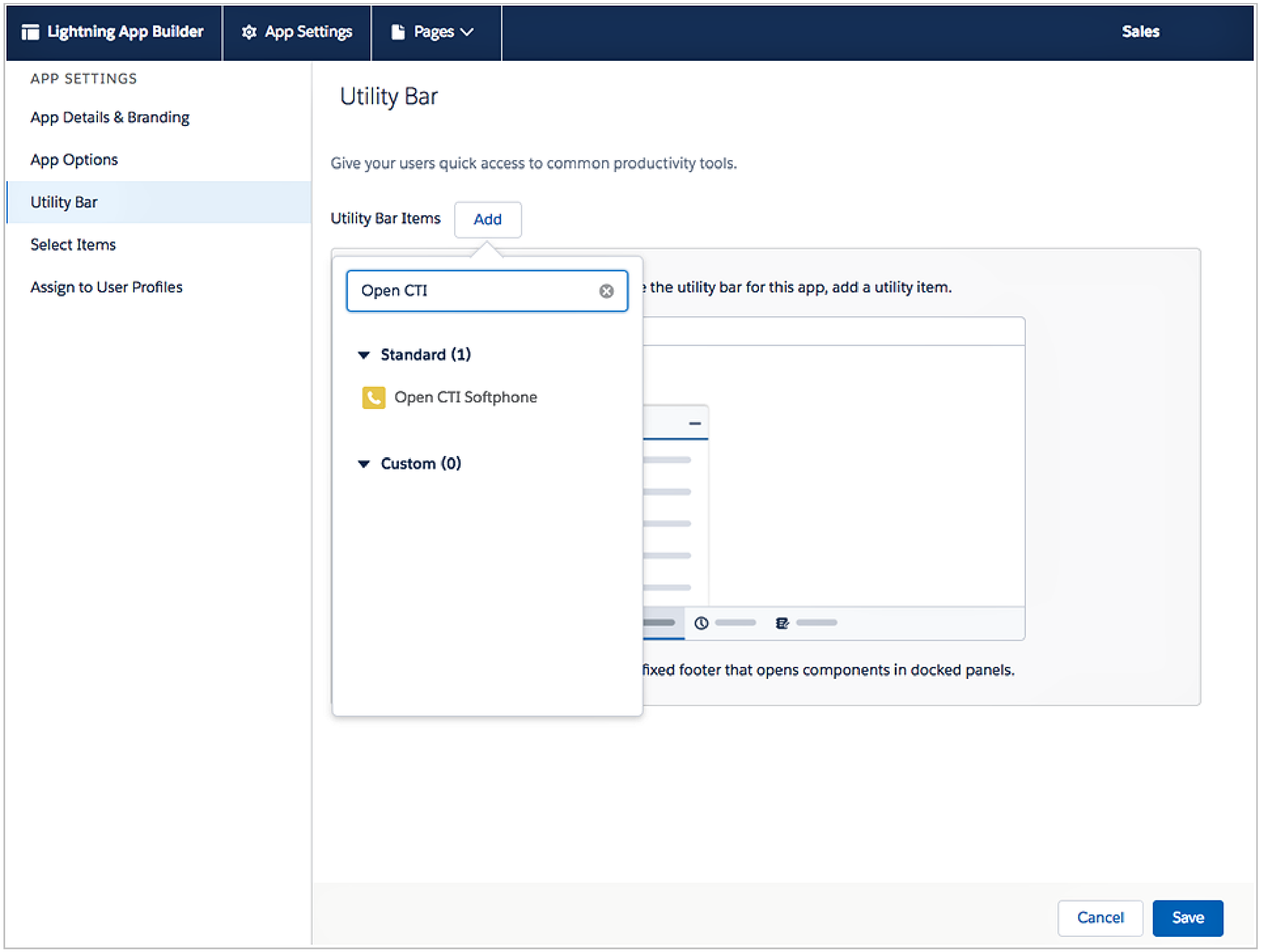


Figure 37

Click **Save** then click **Done.**

Launch the app from **App Launcher,** and you'll see the RingCentral app in the Utility Bar.

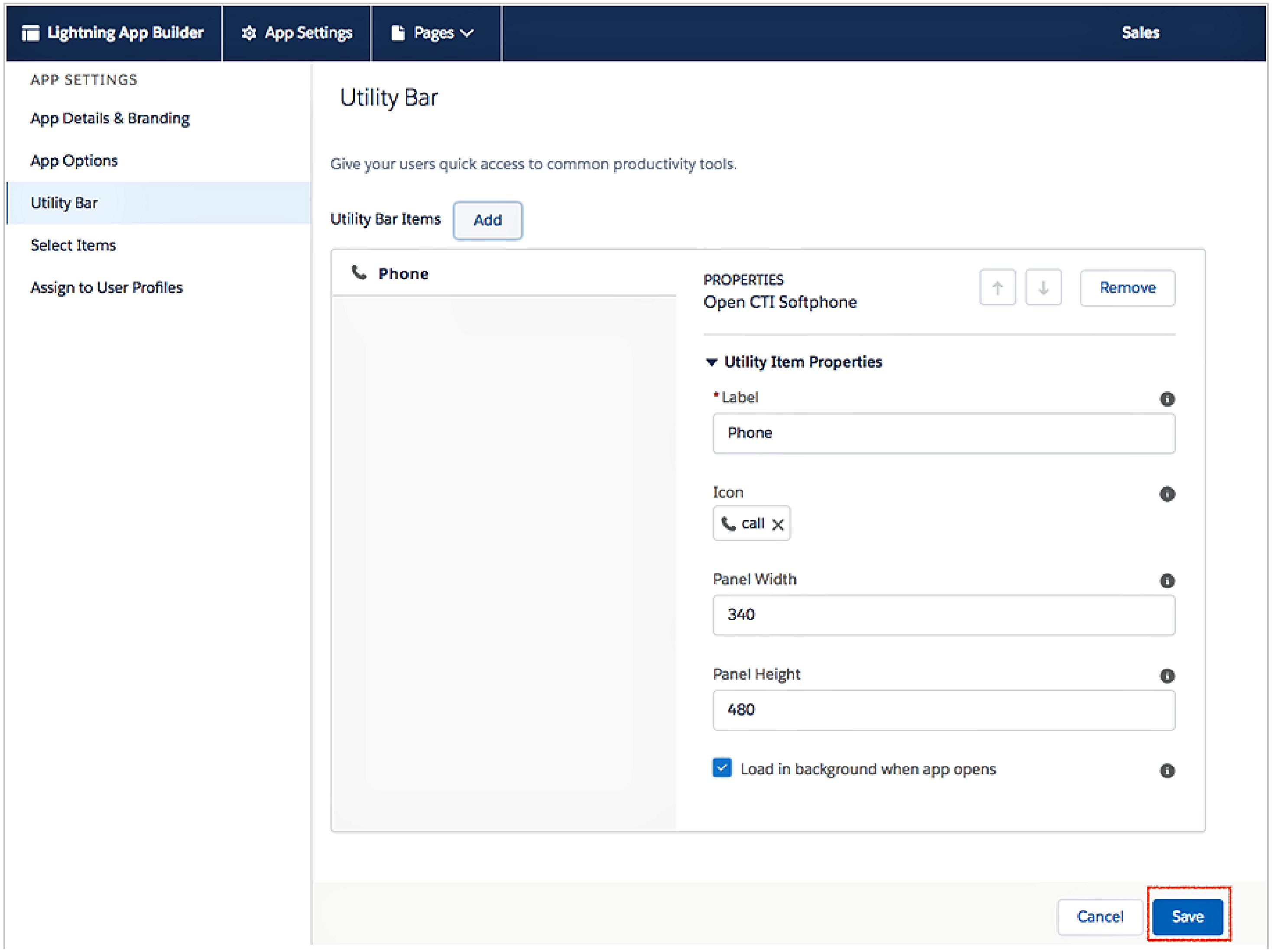


Figure 38

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. (Shown in Figure 38, above)

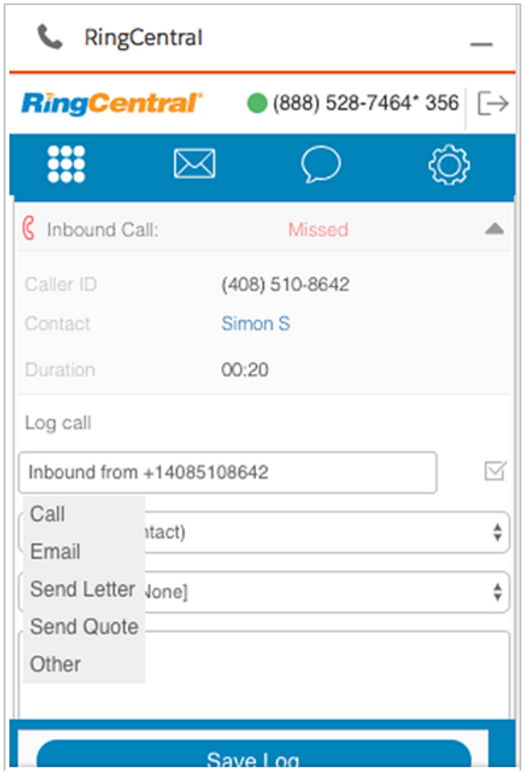


Figure 39

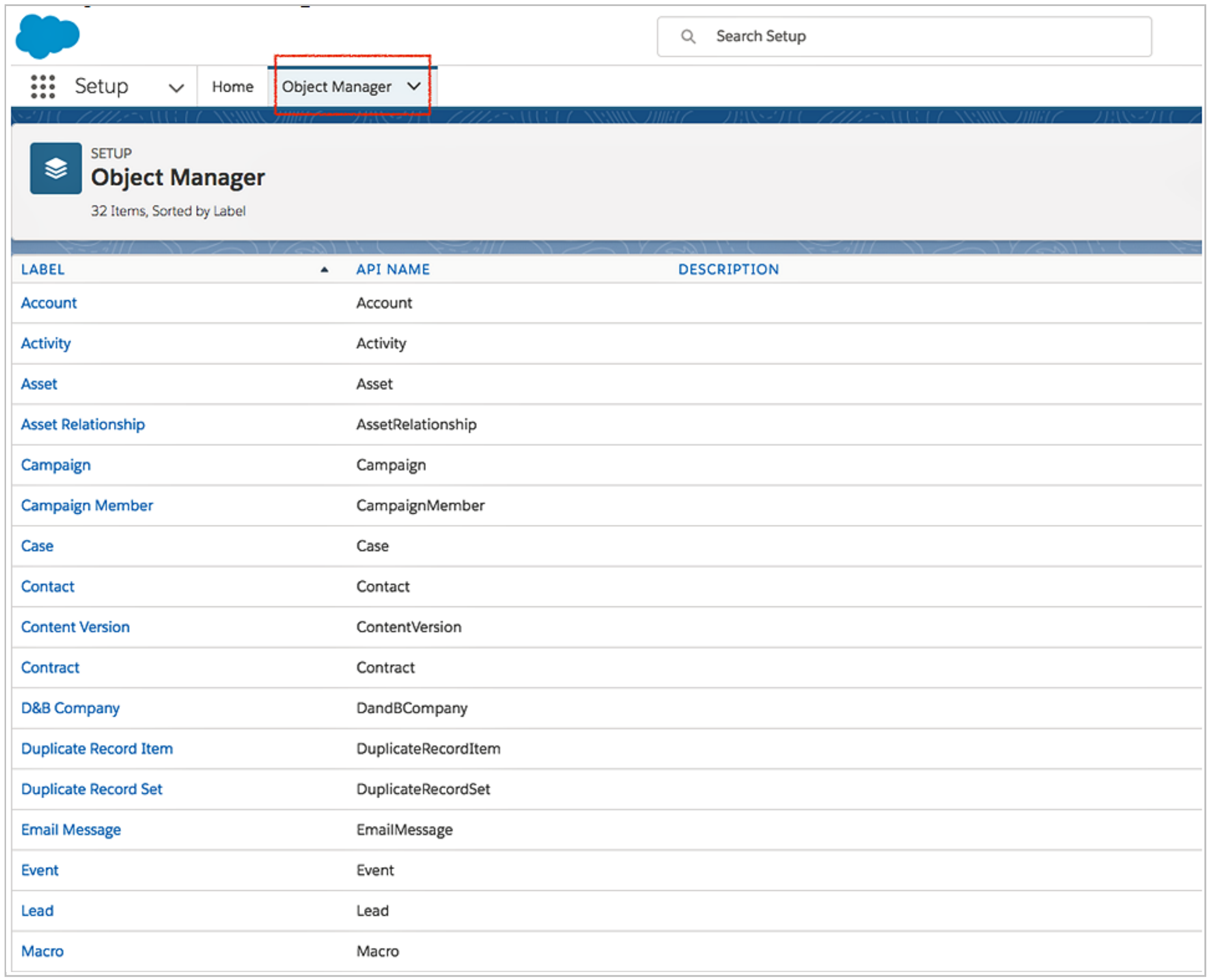


Figure 40

These preset dispositions are gathered from the Subject picklist on the Salesforce.com Task object. To edit these dispositions, navigate to **Setup > Object Manager > Activities > Tasks > Fields & Relationships > Subject**. (Refer to Figures 39 - 42)

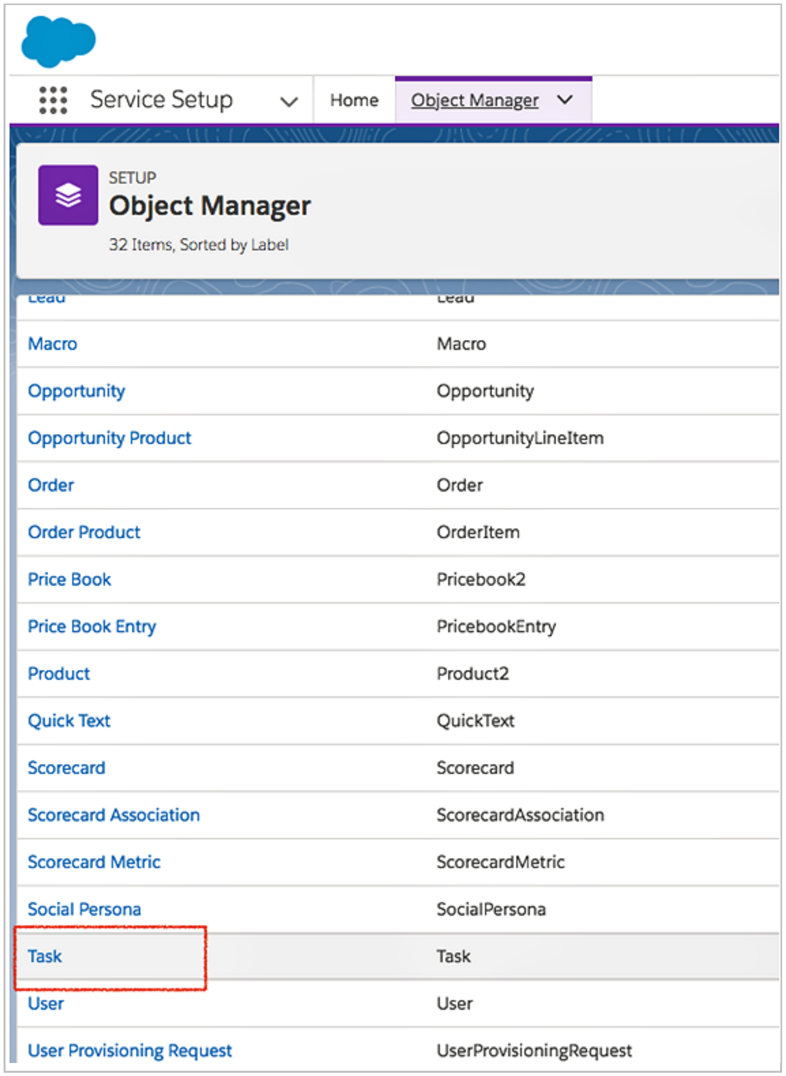


Figure 41

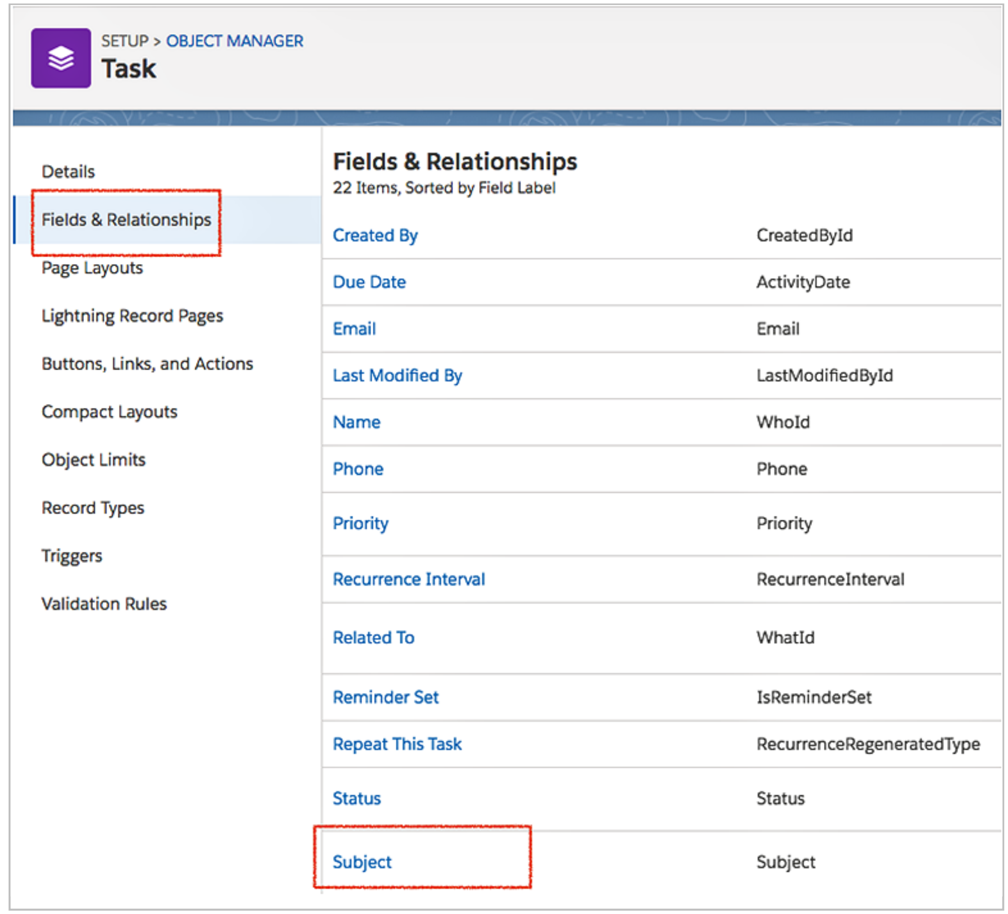


Figure 42

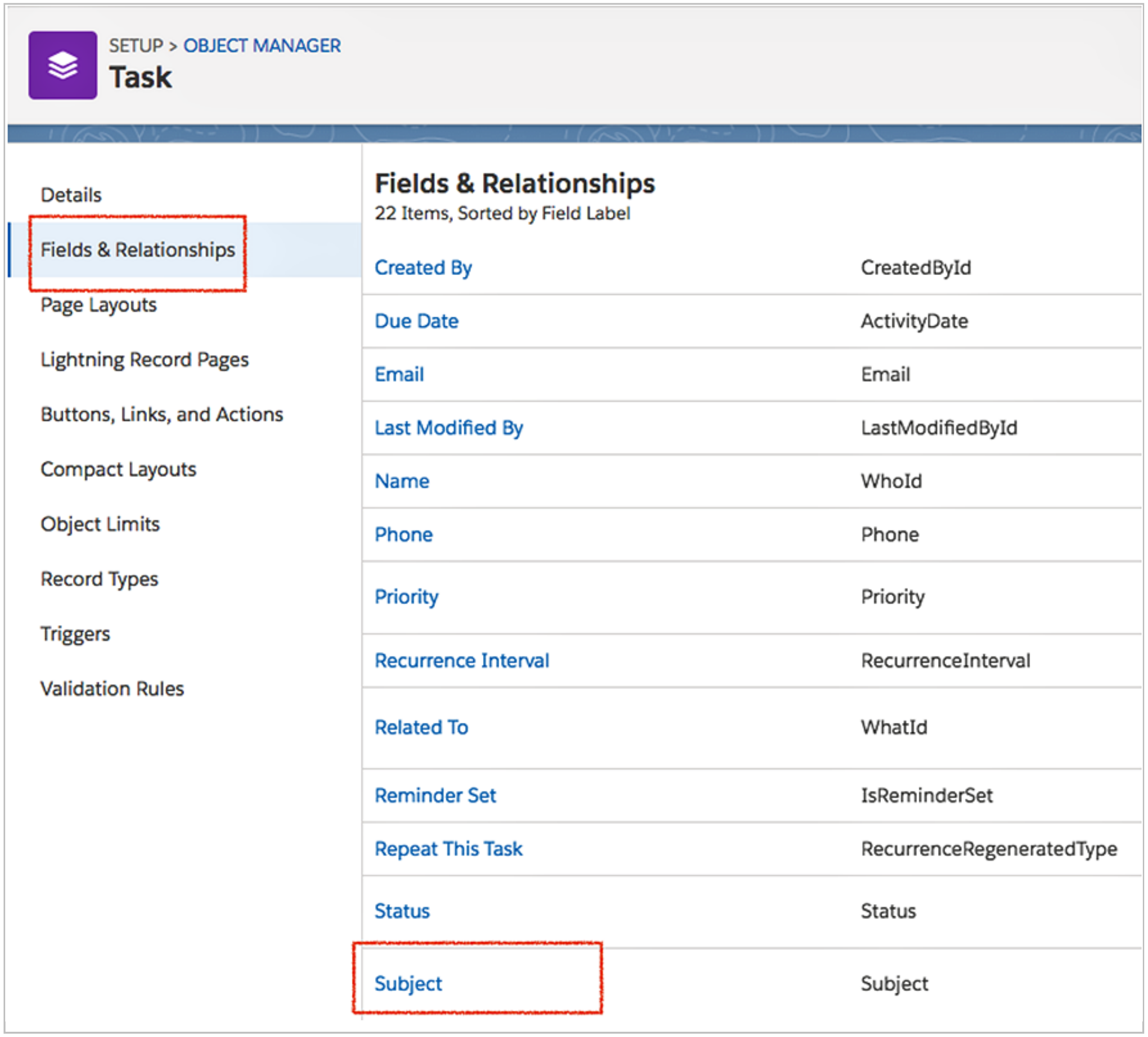


Figure 43

Adding new or editing picklist values here (Figure 43) will instantly modify the dispositions available (in Figure 39) to users.

Share Report Folder with Users

Go to the Reports tab in Salesforce.

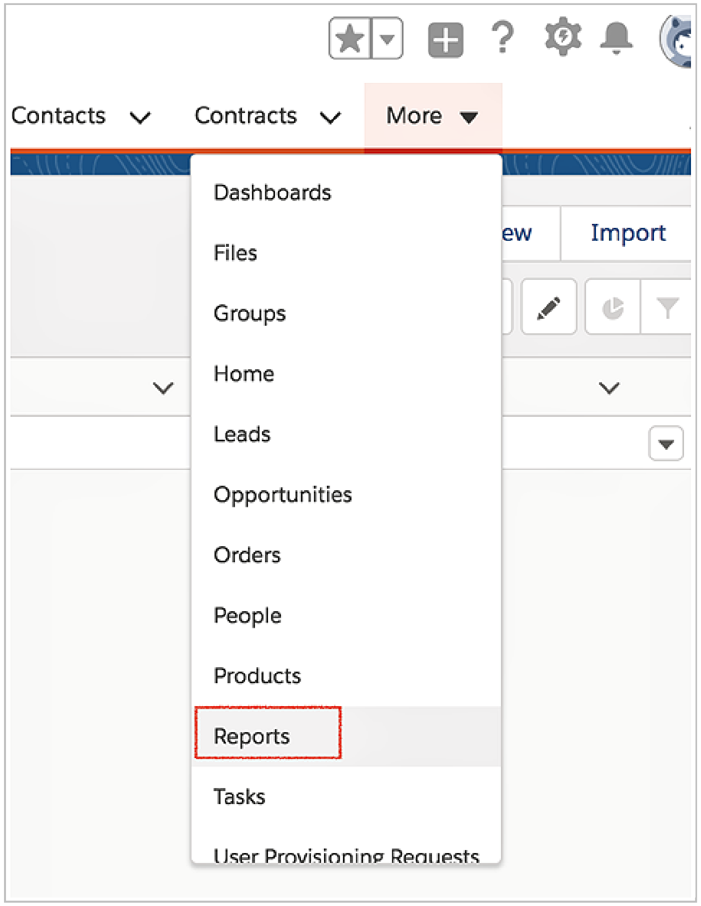


Figure 44

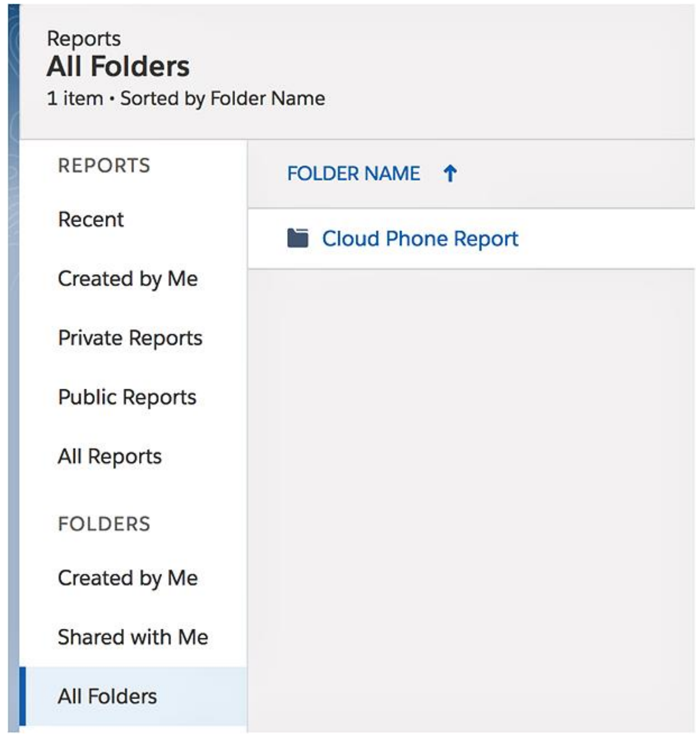


Figure 45

Find the “Cloud Phone Report” folder by clicking on “All Folders” on the left menu as shown in Figure 45.

Click on the dropdown on the right of the "Cloud Phone Report" and click **Share**. (Figure 46)

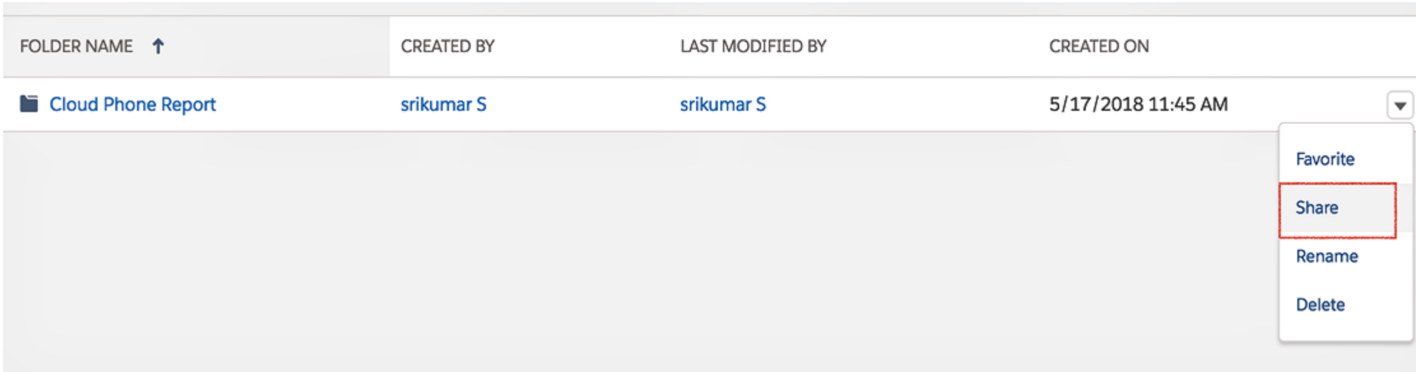


Figure 46

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

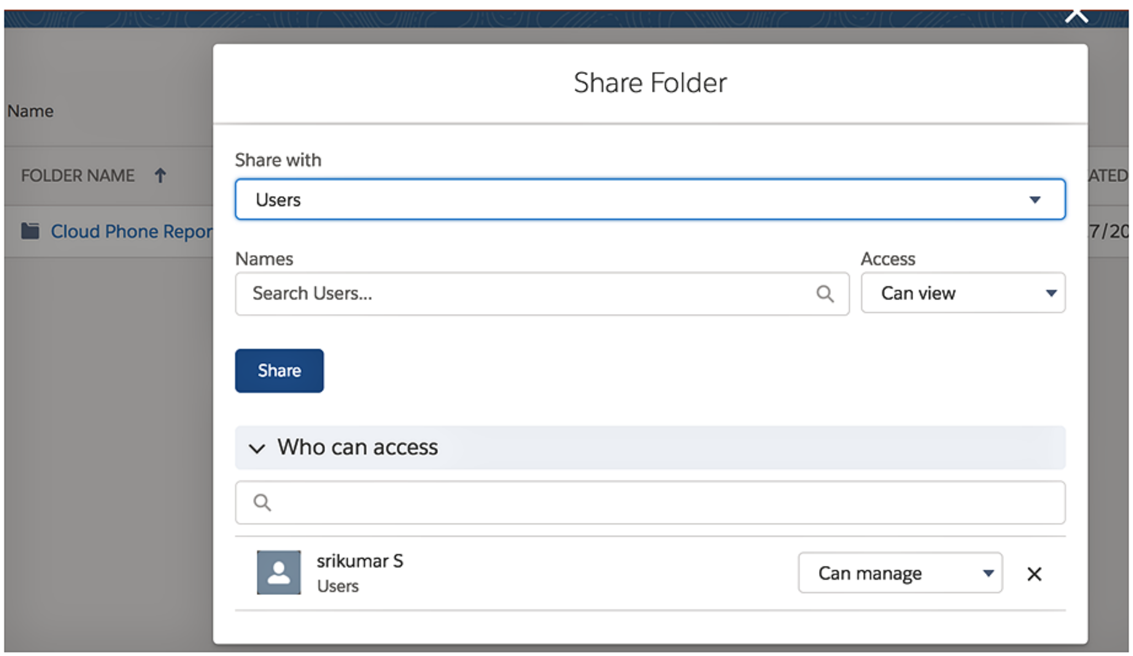


Figure 47

AdminUI

AdminUI is a VisualForce page created for administrators to make organization-wide changes to RingCentral for Lightning app settings. The page is: /apex/rcsfl__adminUI999.

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/rcsf_adminUI999. You'll be prompted after you enter the URL to: Please press 'Initialize' to go the AdminUI.

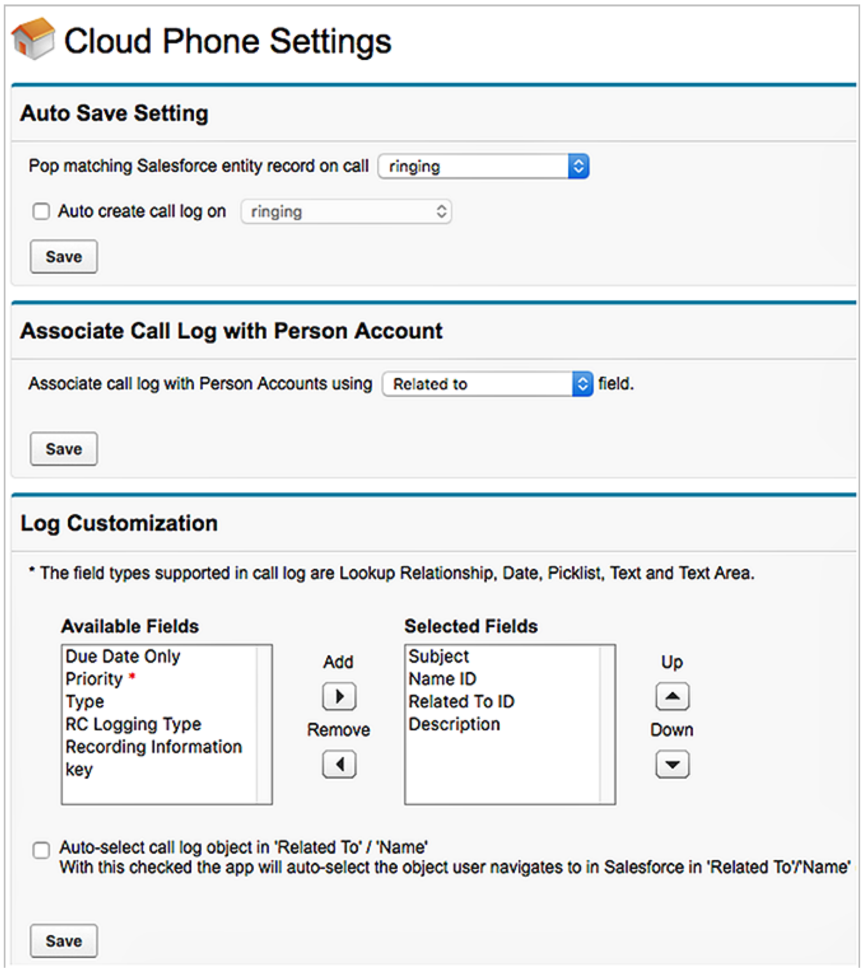


Figure 48

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.

Note: 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**.

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.

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 the 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; the app will not change what the 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 a 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 **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 49)

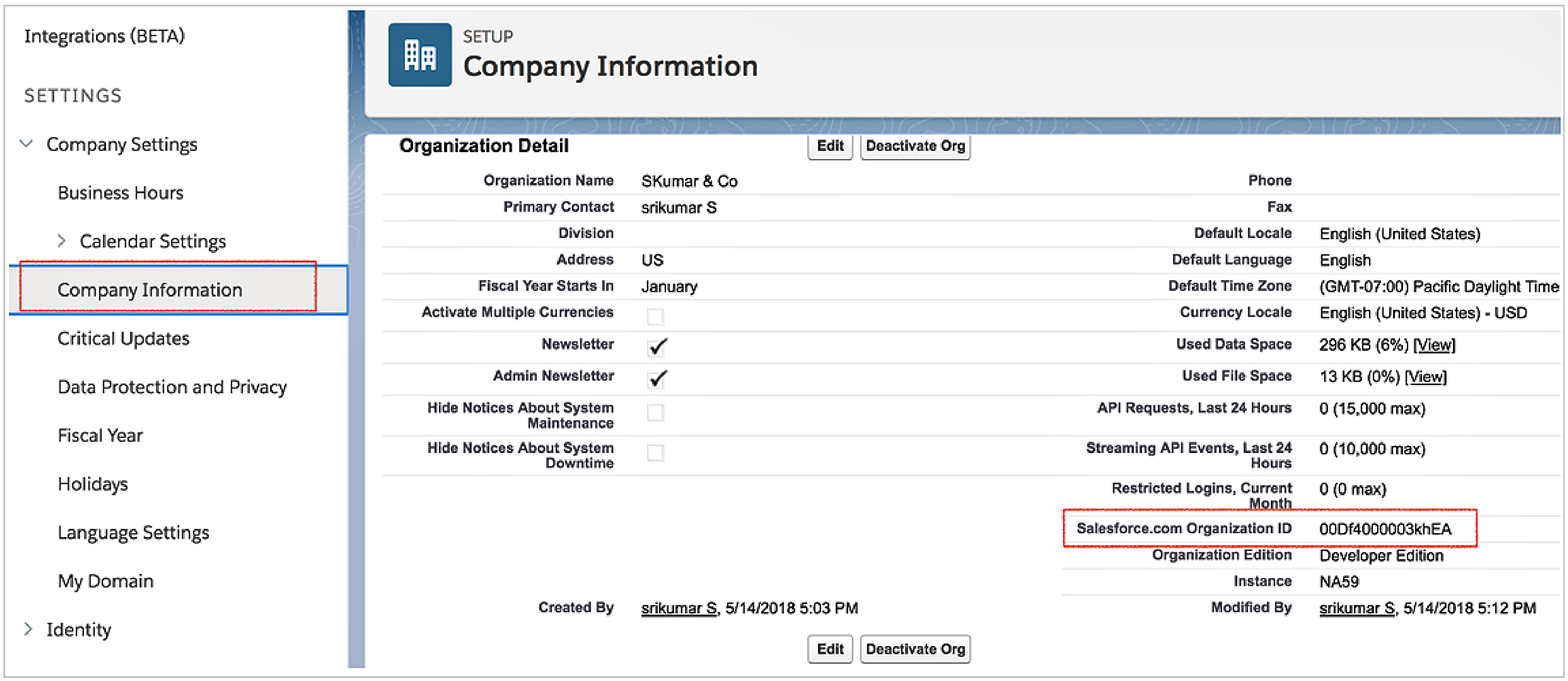


Figure 49

Call Recording

To allow users in your organization to access their RingCentral call recordings from within Salesforce, please go to Object Manager > Task > Page Layout (Figures 50, 51)

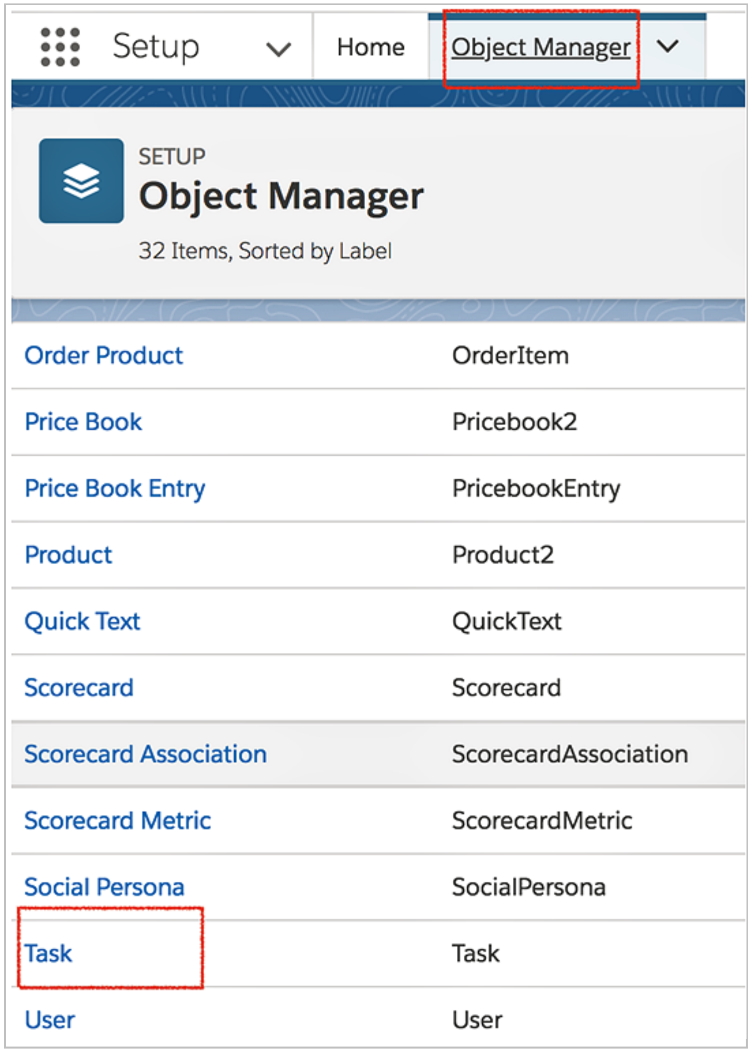


Figure 50

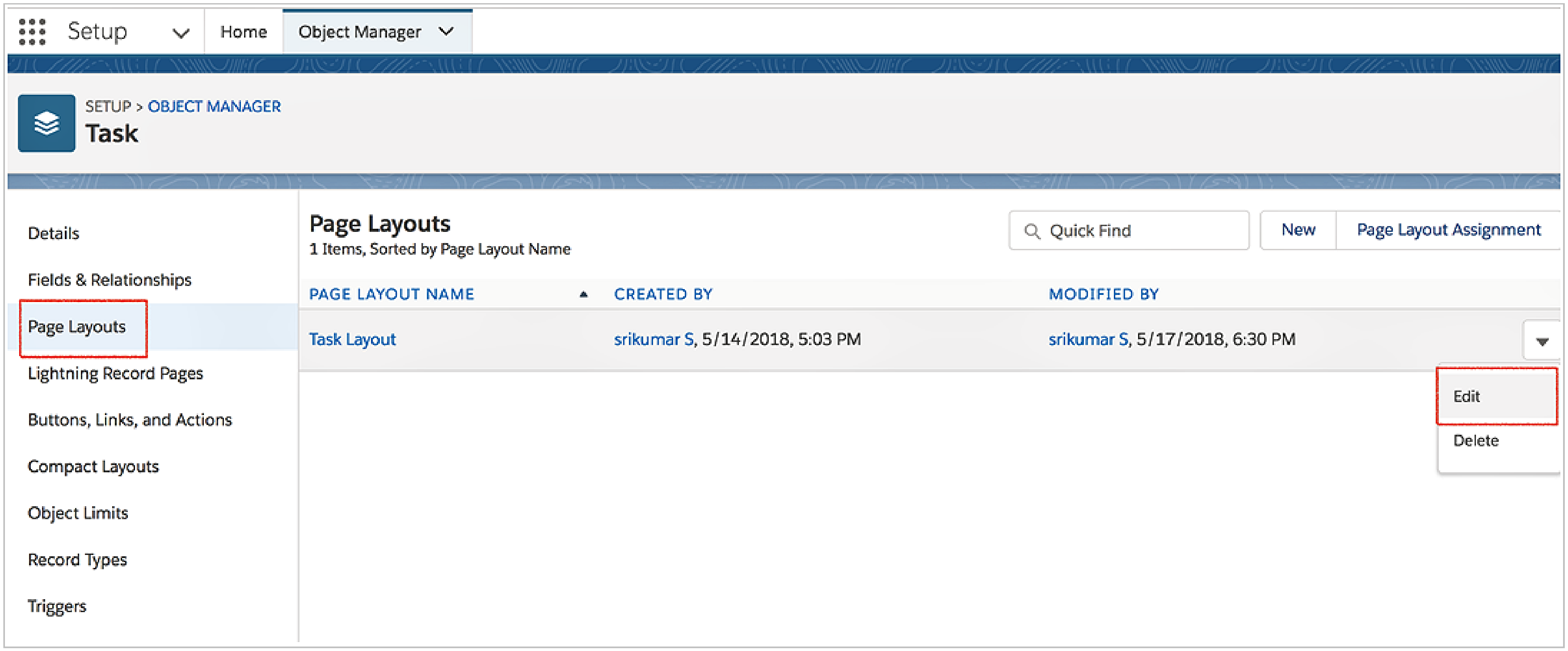


Figure 51

Click 'Edit' for the page layout you want to configure.and move the 'Call Recording' field to the Task Detail section, as shown in Figure 52, below.

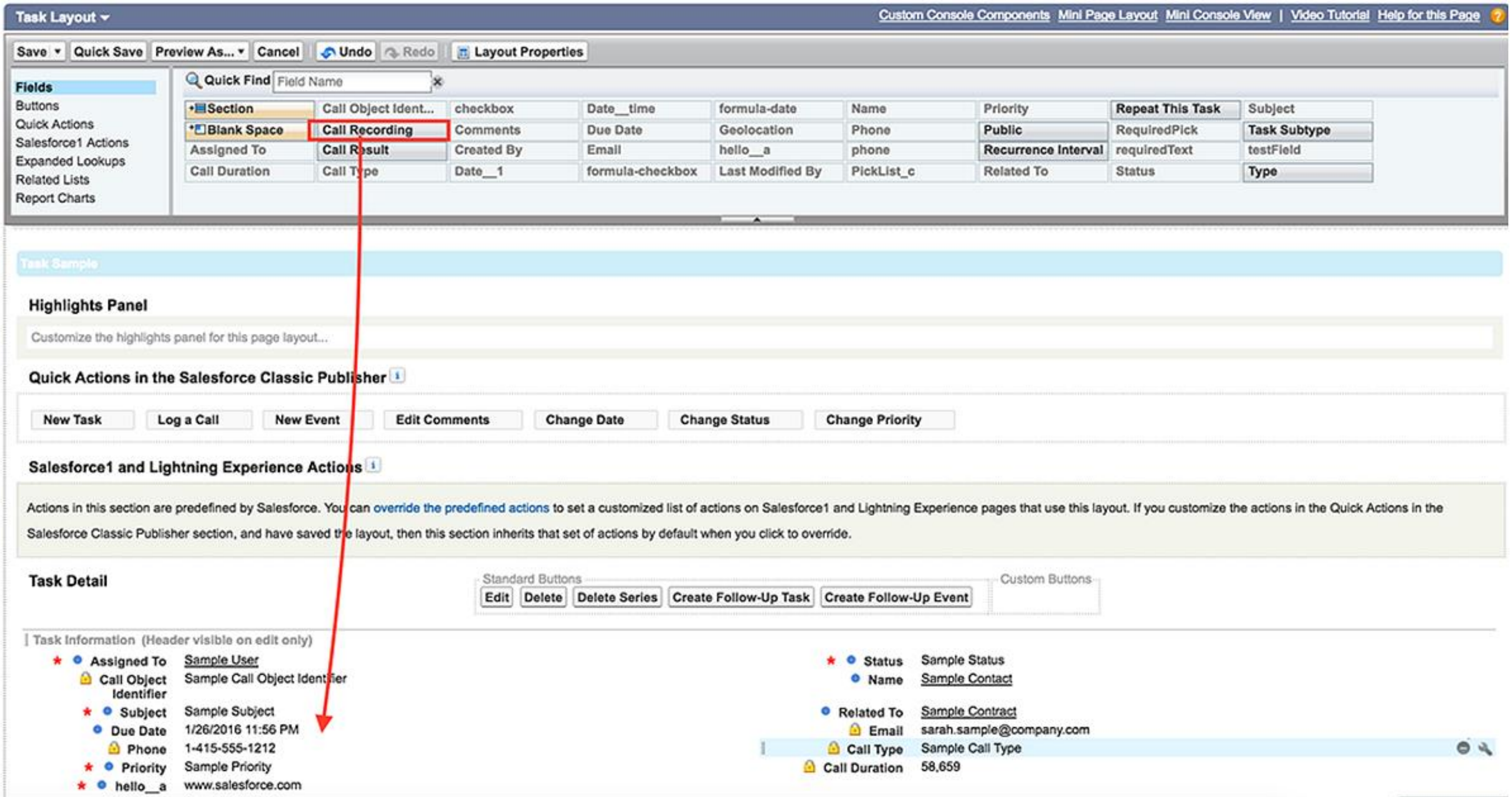

Task Layout
Custom Console Components Mini Page Layout Mini Console View | Video Tutorial Help for this Page
Save Quick Save Preview As... Cancel Undo Redo Layout Properties
Fields
Buttons
Quick Actions
Salesforce1 Actions
Expanded Lookups
Related Lists
Report Charts
Quick Find
Section
Blank Space
Assigned To
Call Duration
Call Object Ident...
Call Recording
Call Result
Call Type
checkbox
Comments
Created By
Date__1
Date__time
Due Date
Email
formula-checkbox
formula-date
Geolocation
hello__a
Last Modified By
Name
Phone
phone
PickList_c
Priority
Public
Recurrence Interval
Related To
Repeat This Task
RequiredPick
requiredText
Status
Subject
Task Subtype
testField
Type
Highlights Panel
Customize the highlights panel for this page layout...
Quick Actions in the Salesforce Classic Publisher
New Task
Log a Call
New Event
Edit Comments
Change Date
Change Status
Change Priority
Salesforce1 and Lightning Experience Actions
Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Salesforce1 and Lightning Experience pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.
Task Detail
Standard Buttons
Edit
Delete
Delete Series
Create Follow-Up Task
Create Follow-Up Event
Custom Buttons
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
Status
Sample Status
Name
Sample Contact
Related To
Sample Contract
Email
sarah.sample@company.com
Call Type
Sample Call Type
Call Duration
58,659

Figure 52

Add RingCentral Call and SMS Options to Salesforce1

Follow the steps below to add **Call with RingCentral** and **SMS with RingCentral** options to Account/Contact/Lead details tab in the Salesforce1 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**. (Figures 53, 54)

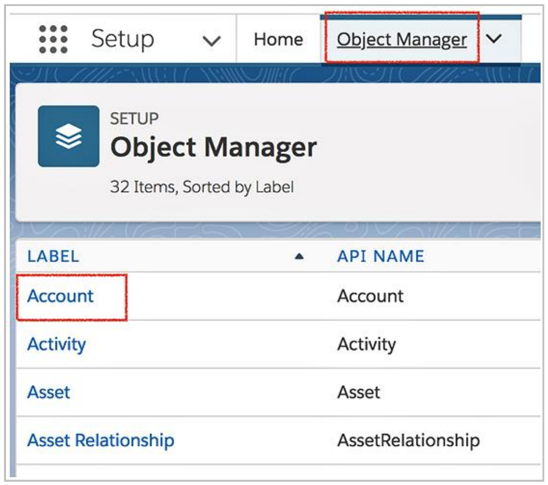


Figure 53

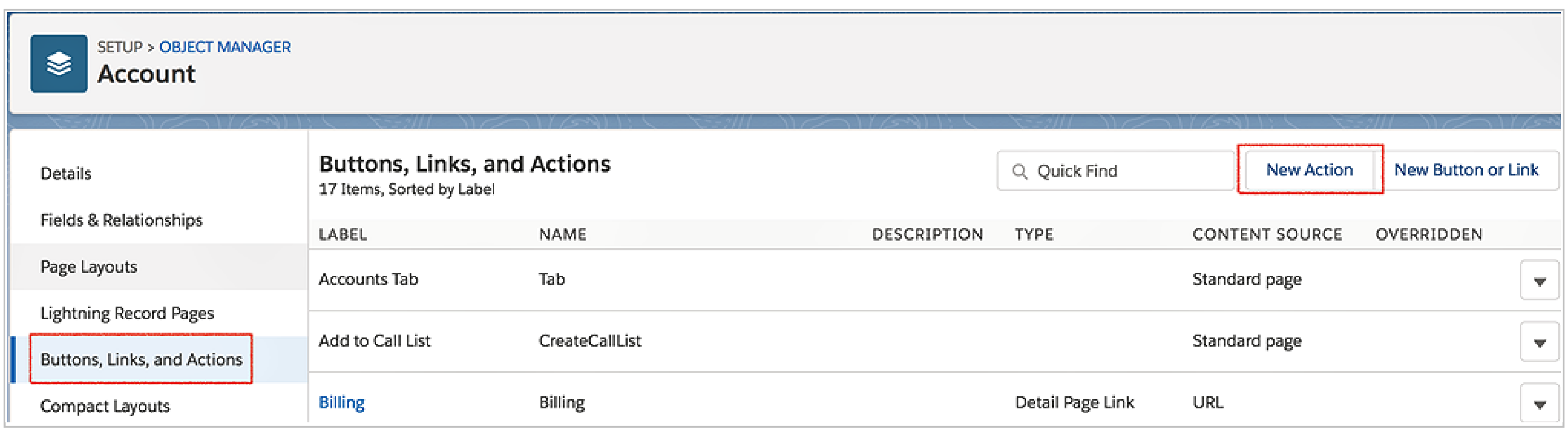


Figure 54

Select '**Custom Visualforce**' as **Action type** and select '**Phone Numbers Account999 [Phone_Numbers_Account999]**' in the **Visualforce Page** dropdown list, then enter '**Call with RingCentral**' as **Label**, and click **Save**. (Figure 55)

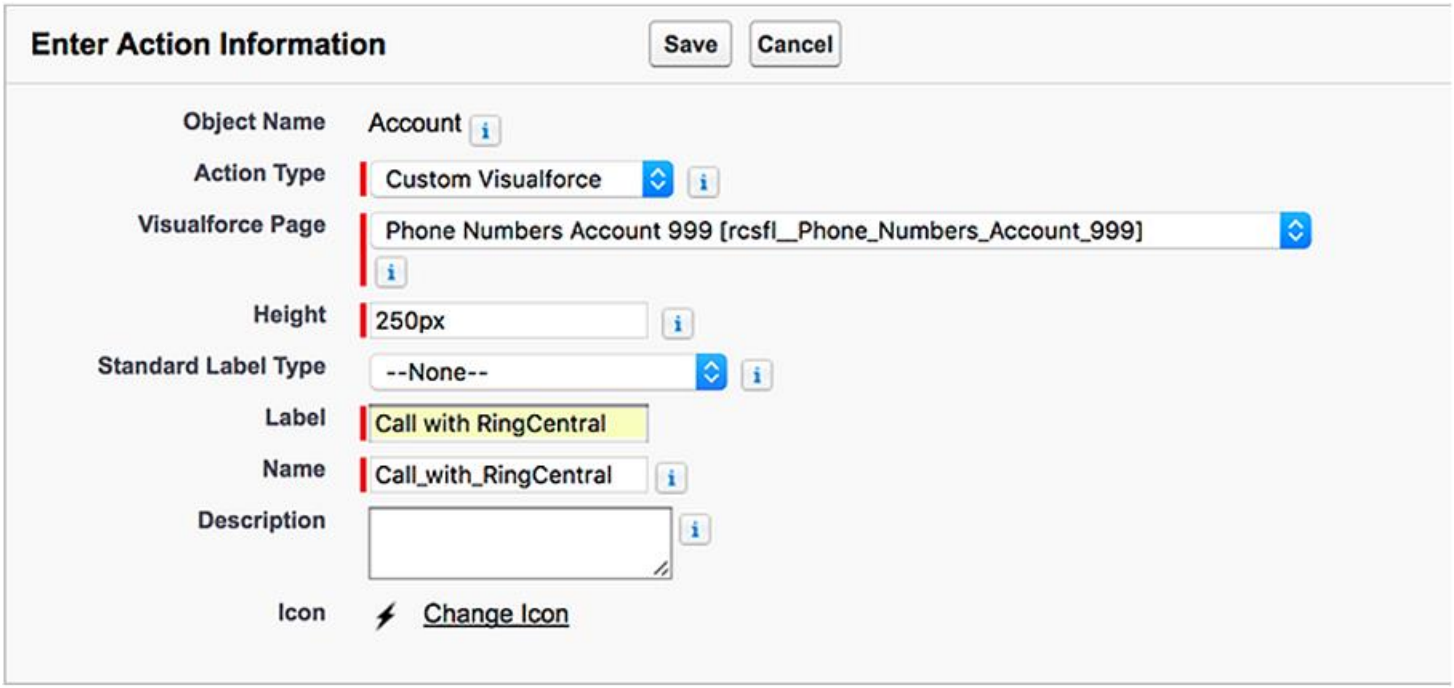


Figure 55

Repeat the above step and select '**Phone Numbers SMS Account999 [Phone_Numbers_SMS_Account999]**' in **Visualforce Page** dropdown list, enter '**SMS with RingCentral'** as **Label**, click **Save**. (Figure 56)

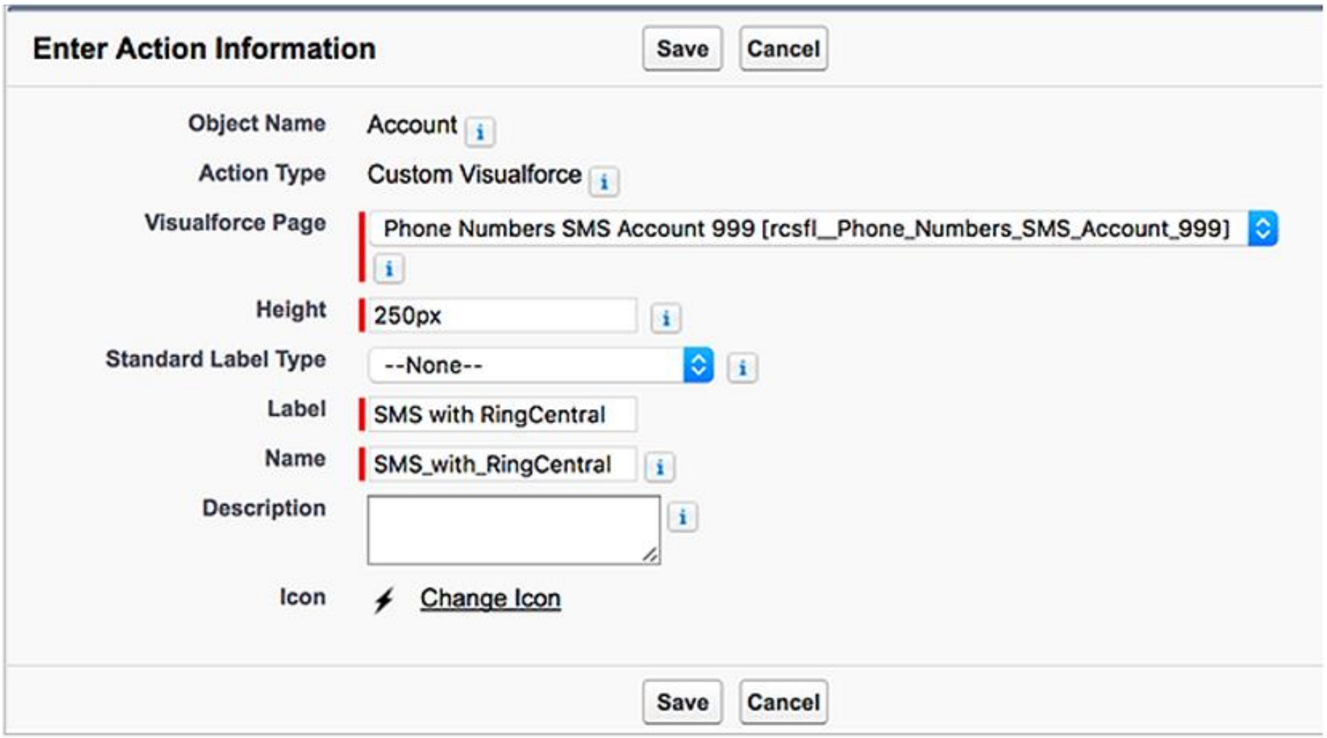


Figure 56

Add Actions to Salesforce1

Go to Setup > Object Manager > Accounts > Page Layouts > Page Layout Assignment. (Figures 53, 57). Select the Page Layout you want to change and click **Edit**.

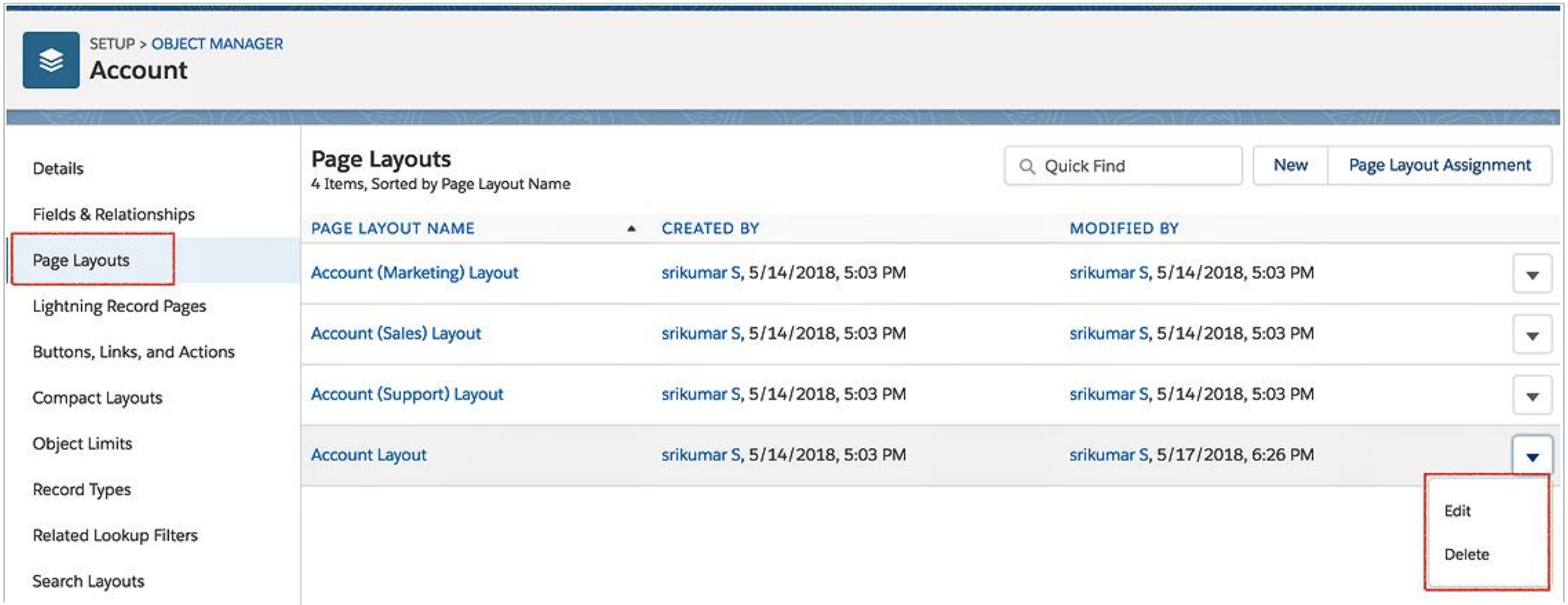
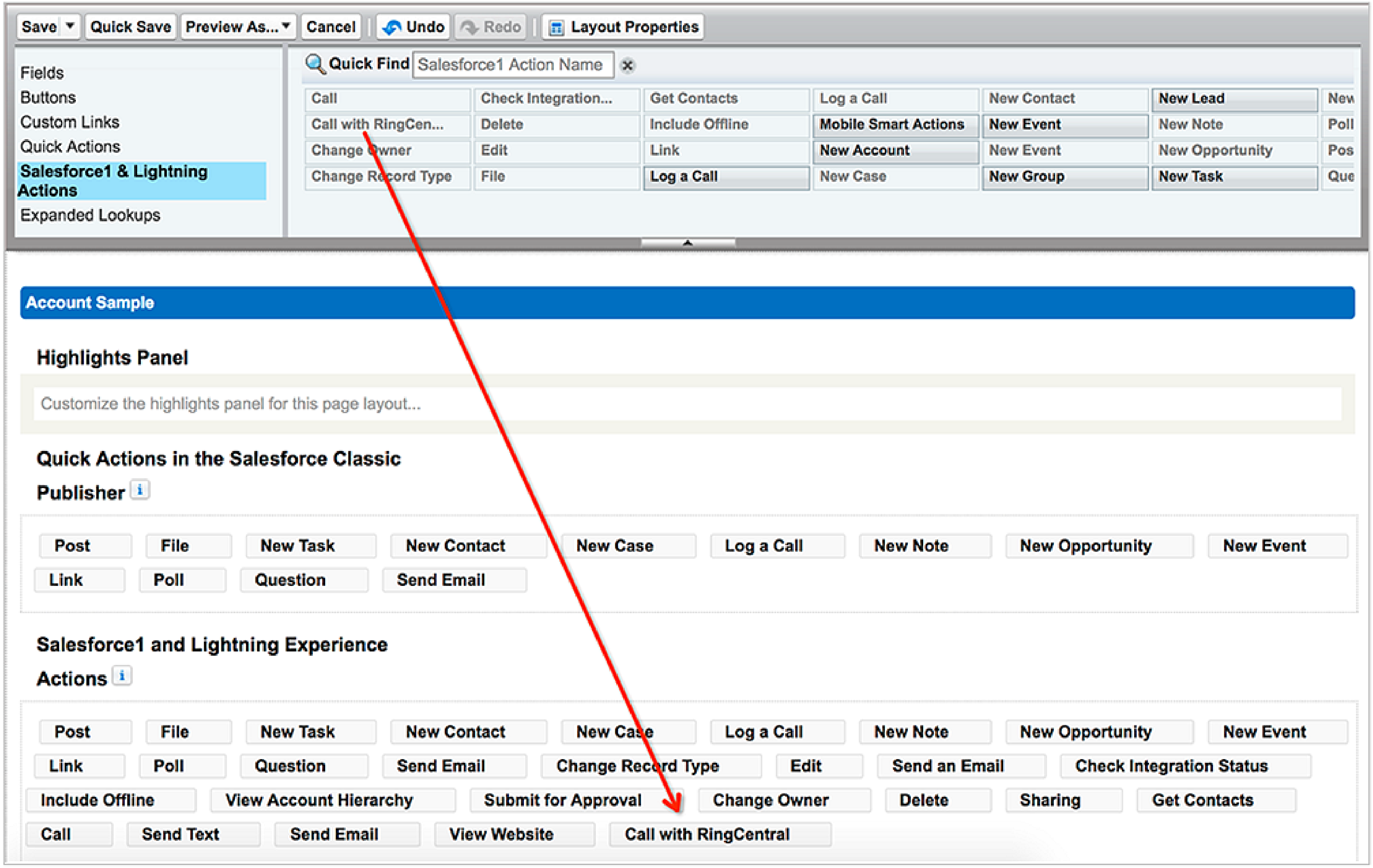


Figure 57

From Salesforce1 & Lightning Actions list drag the actions Call with RingCentral and SMS with RingCentral to the Salesforce1 and Lightning Experience section. Click **Save**. (Figures 58, 59)



Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Custom Links
Quick Actions
Salesforce1 & Lightning Actions
Expanded Lookups
Quick Find
Salesforce1 Action Name
Call
Check Integration...
Get Contacts
Log a Call
New Contact
New Lead
Call with RingCen...
Delete
Include Offline
Mobile Smart Actions
New Event
New Note
Poll
Change Owner
Edit
Link
New Account
New Event
New Opportunity
Change Record Type
File
Log a Call
New Case
New Group
New Task
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
Send Email
Salesforce1 and Lightning Experience Actions
Post
File
New Task
New Contact
New Case
Log a Call
New Note
New Opportunity
New Event
Link
Poll
Question
Send Email
Change Record Type
Edit
Send an Email
Check Integration Status
Include Offline
View Account Hierarchy
Submit for Approval
Change Owner
Delete
Sharing
Get Contacts
Call
Send Text
Send Email
View Website
Call with RingCentral

Figure 58

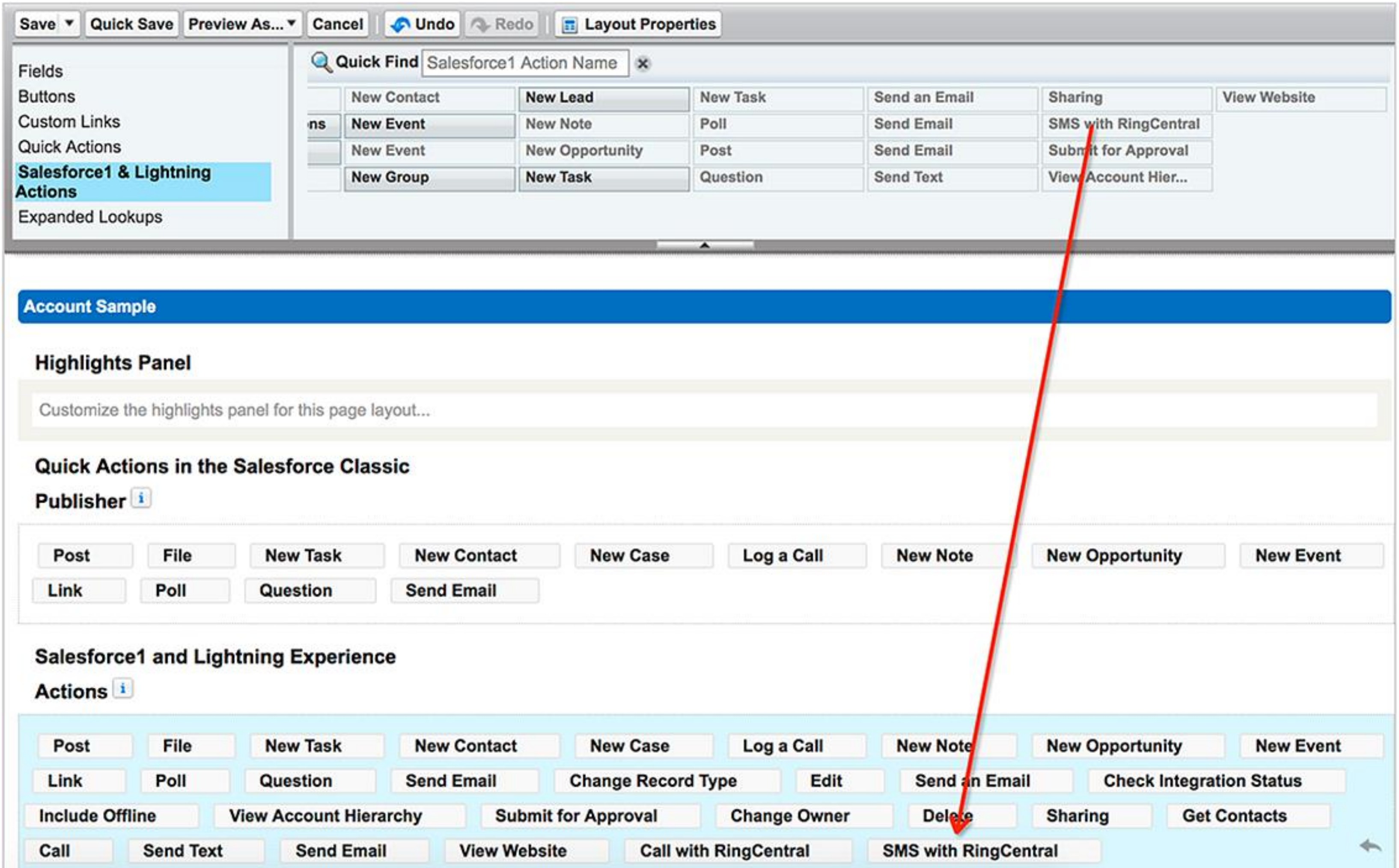

Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Custom Links
Quick Actions
Salesforce1 & Lightning Actions
Expanded Lookups
Quick Find
Salesforce1 Action Name
New Contact
New Lead
New Task
Send an Email
Sharing
View Website
New Event
New Note
Poll
Send Email
SMS with RingCentral
New Event
New Opportunity
Post
Send Email
Submit for Approval
New Group
New Task
Question
Send Text
View Account Hier...
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
Send Email
Salesforce1 and Lightning Experience Actions
Post
File
New Task
New Contact
New Case
Log a Call
New Note
New Opportunity
New Event
Link
Poll
Question
Send Email
Change Record Type
Edit
Send an Email
Check Integration Status
Include Offline
View Account Hierarchy
Submit for Approval
Change Owner
Delete
Sharing
Get Contacts
Call
Send Text
Send Email
View Website
Call with RingCentral
SMS with RingCentral

Figure 59

Buttons are added. Go to **Salesforce1** and check an account's details; there will be **Call with RingCentral** and **SMS with RingCentral** options. (Figure 60)

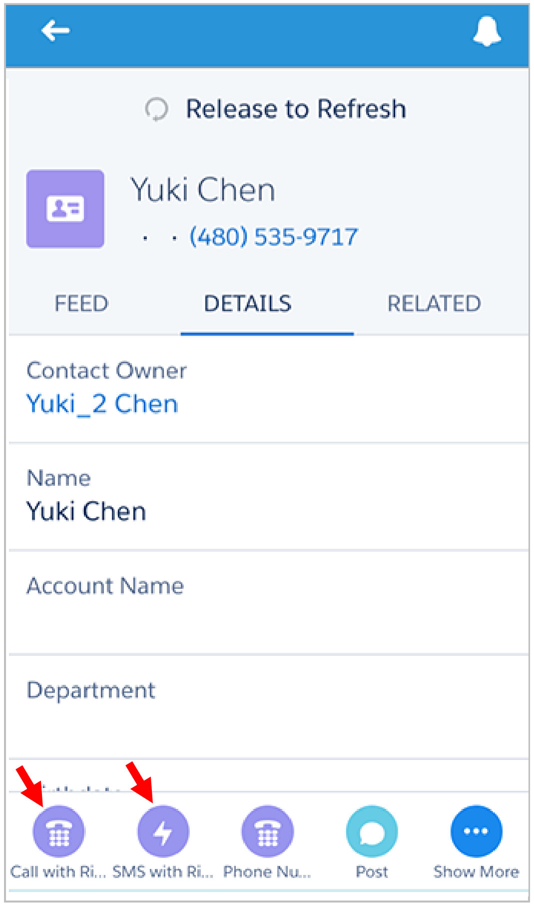


Figure 60

Troubleshooting

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

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 2 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 **OpenCTIIndex999** 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/OpenCTIIndex999**

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.