

# 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.

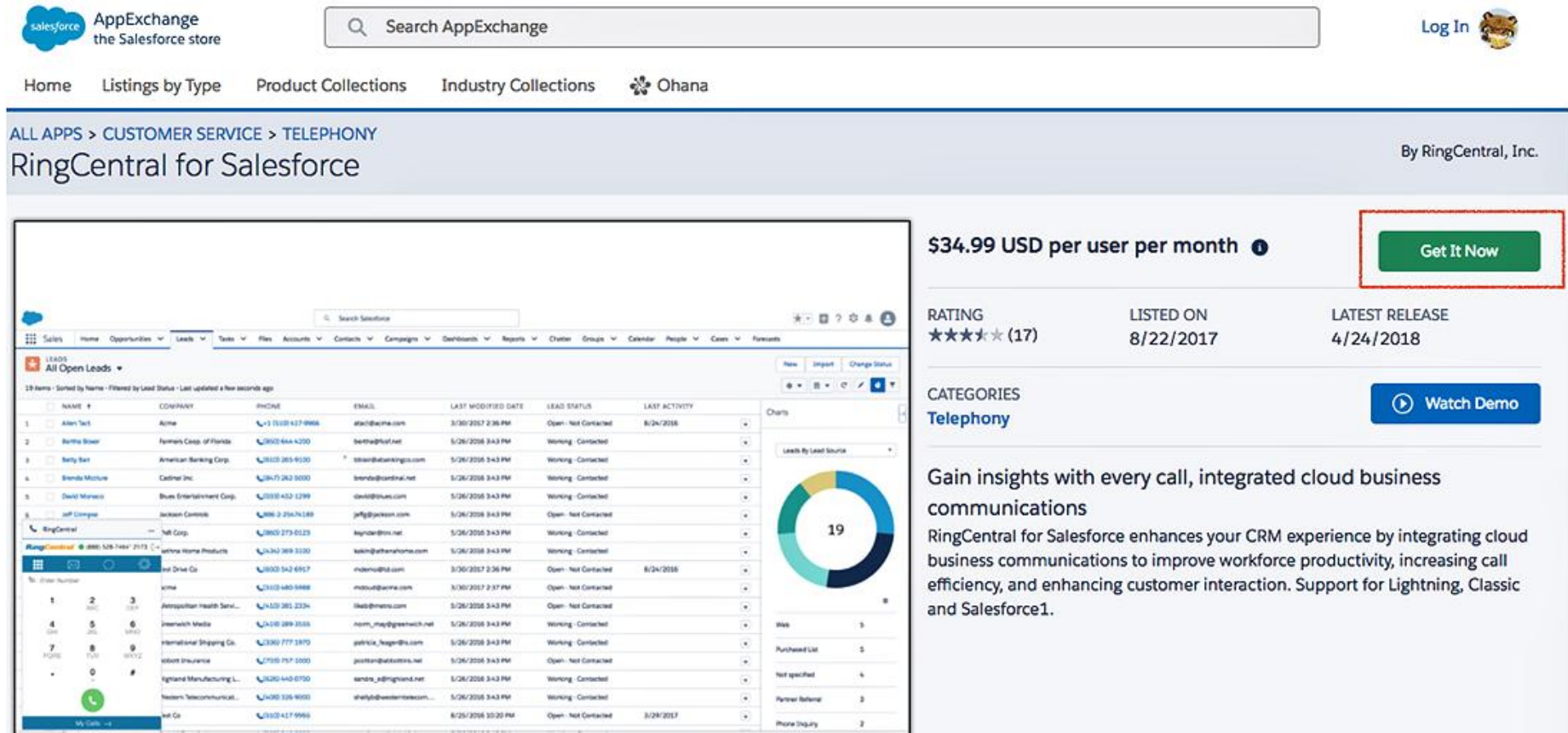
### About this Guide

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.



**AppExchange the Salesforce store**

Search AppExchange

Home Listings by Type Product Collections Industry Collections Ohana

ALL APPS > CUSTOMER SERVICE > TELEPHONY

**RingCentral for Salesforce** By RingCentral, Inc.

**\$34.99 USD per user per month**

**Get It Now**

**RATING** ★★★★★ (17)

**LISTED ON** 8/22/2017

**LATEST RELEASE** 4/24/2018

**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. Support for Lightning, Classic and Salesforce1.

ID	NAME	COMPANY	PHONE	EMAIL	LAST MODIFIED DATE	LEAD STATUS	LAST ACTIVITY
1	Allen Tech	Alme	+1 750 437 9966	allen@alme.com	3/30/2017 2:36 PM	Open - Not Contacted	8/24/2018
2	Bertie Bower	Farmers Coop of Florida	+1 904 644 4200	bertie@fcof.net	5/26/2018 3:43 PM	Working - Contacted	
3	Betty Bart	American Banking Corp.	+1 202 265 9130	bbart@americanbanking.com	5/26/2018 3:43 PM	Working - Contacted	
4	Blends Moture	Cardinal Inc.	+1 204 75 263 0000	blends@cardinal.net	5/26/2018 3:43 PM	Working - Contacted	
5	David Merviss	Blues Entertainment Corp.	+1 303 432 1299	david@blues.com	5/26/2018 3:43 PM	Working - Contacted	
6	Jeff Conger	Jackson Controls	+1 888 2 254 74 188	jeff@jackson.com	5/26/2018 3:43 PM	Open - Not Contacted	
7	RingCentral	Nat Corp.	+1 800 275 0123	keynote@nat.com	5/26/2018 3:43 PM	Working - Contacted	
8	Latina Home Products	Latina Home Products	+1 343 369 3130	latina@latinahome.com	5/26/2018 3:43 PM	Working - Contacted	
9	Indrive Co	Indrive Co	+1 800 342 6957	indrive@ind.com	3/30/2017 2:36 PM	Open - Not Contacted	8/24/2018
10	Indrive Co	Indrive Co	+1 800 342 6957	indrive@ind.com	3/30/2017 2:36 PM	Open - Not Contacted	8/24/2018
11	Antepack Health Serv...	Antepack Health Serv...	+1 415 381 2324	antepack@antepack.com	5/26/2018 3:43 PM	Open - Not Contacted	
12	Interact Media	Interact Media	+1 202 289 2034	interact@interact.net	5/26/2018 3:43 PM	Working - Contacted	
13	International Shipping Co.	International Shipping Co.	+1 330 777 3370	patrick@international.com	5/26/2018 3:43 PM	Working - Contacted	
14	Robert Insurance	Robert Insurance	+1 703 757 1000	robert@robert.com	5/26/2018 3:43 PM	Open - Not Contacted	
15	Highland Manufacturing L...	Highland Manufacturing L...	+1 202 440 0700	hml@highland.net	5/26/2018 3:43 PM	Working - Contacted	
16	Western Telecommunications	Western Telecommunications	+1 408 326 9000	westtel@westerntelecom.com	5/26/2018 3:43 PM	Working - Contacted	
17	Nat Co	Nat Co	+1 800 417 9966		8/25/2018 10:20 PM	Open - Not Contacted	3/28/2017

Charts

Leads By Lead Source

19

Web 5

Purchased List 5

Not specified 4

Partner Referral 3

Phone Inquiry 2

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

**Continue as Guest**

**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

 Review the [customization guide](#) for installation and configuration steps.

Package	Version
rc_sf_package (5.10.2 / 5.11.0)	5.10.2 / 5.11.0
Subscription	Organization
Free	SKumar & Co
Duration	Number of Subscribers
Does Not Expire	Site-wide
Username	
skumarco777@gmail.com	

\* ☒ 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.

CancelConfirm and Install

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.

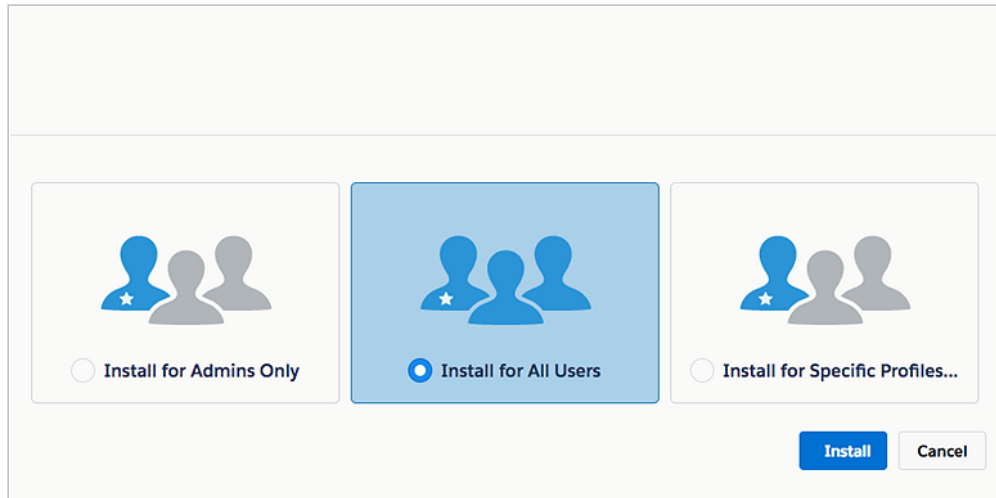


Figure 5

Wait for the installation to complete.

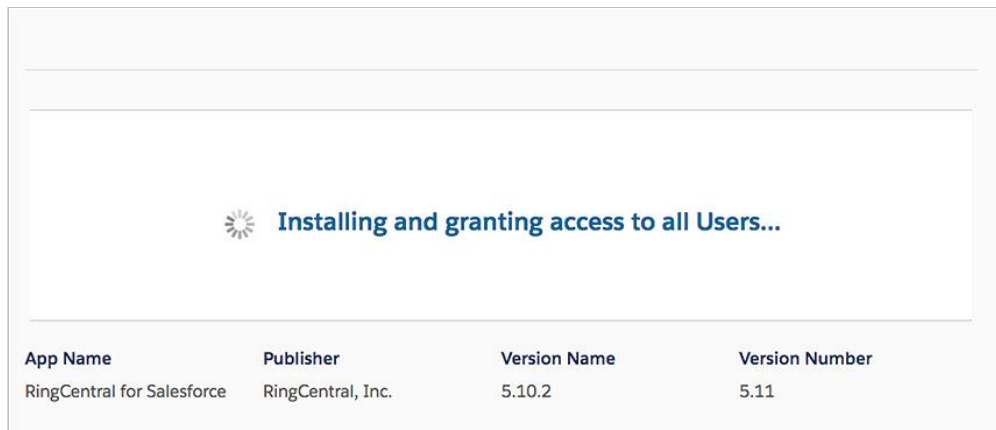


Figure 6

Click “Done” when the installation is complete.

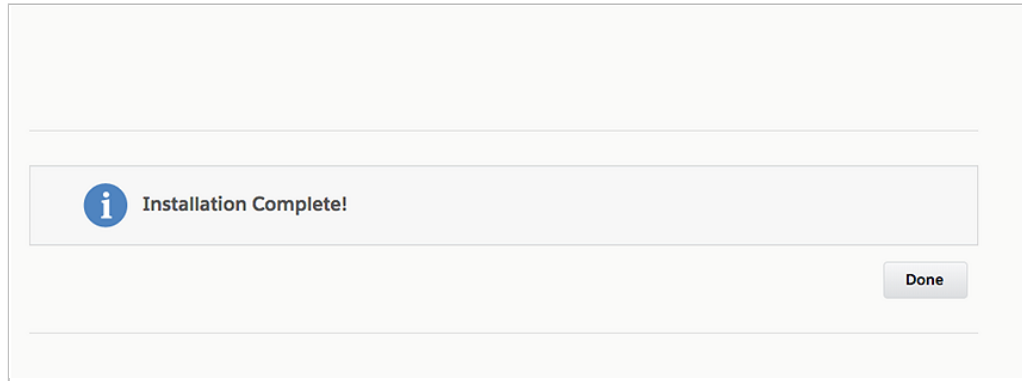
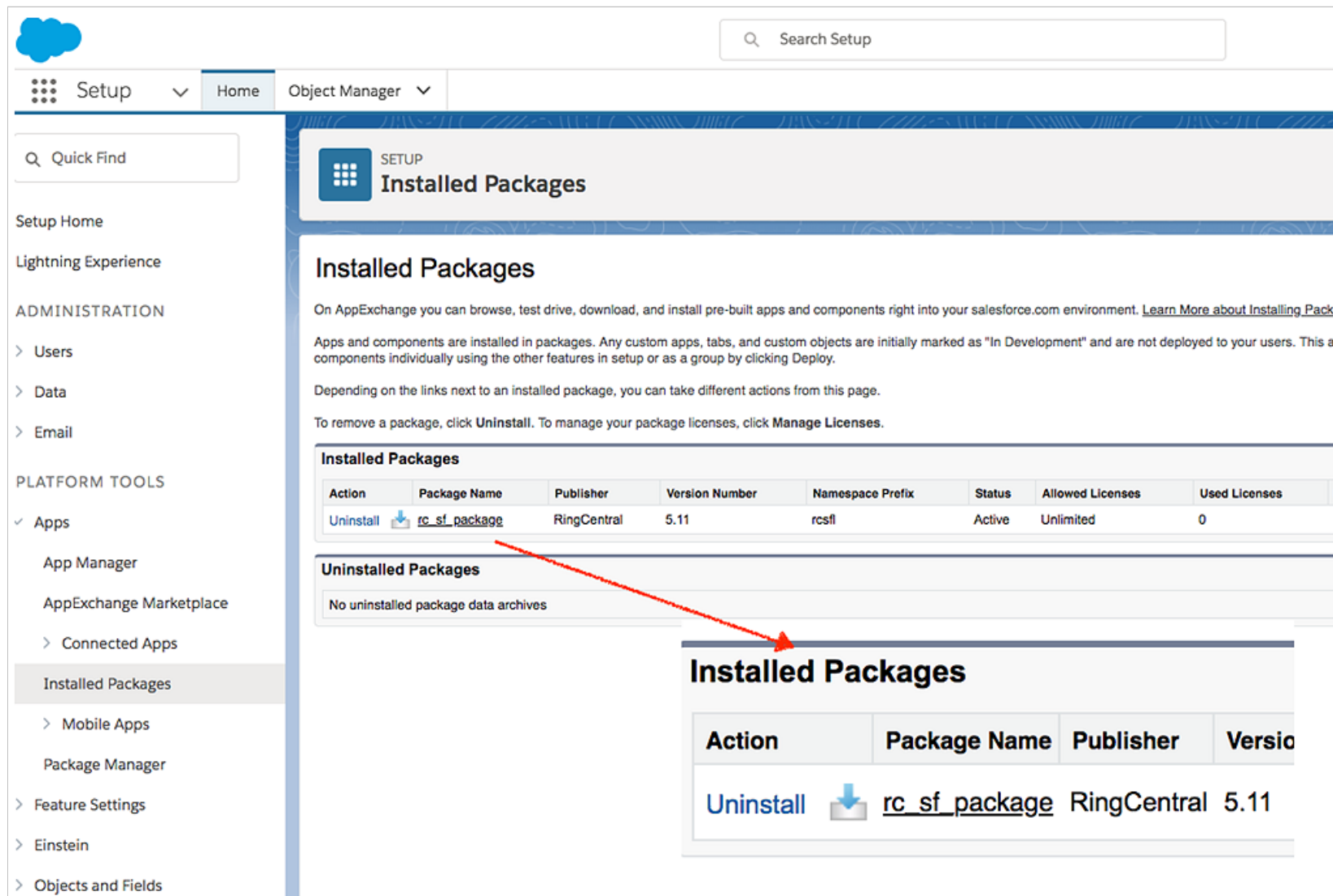


Figure 7

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)





The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Lightning Experience, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Apps, App Manager, AppExchange Marketplace, Connected Apps, Installed Packages, Mobile Apps, Package Manager, Feature Settings, Einstein, Objects and Fields). The main content area is titled 'Installed Packages' and includes a search bar. Below the title, there is explanatory text about AppExchange and instructions on how to manage packages. A table lists installed packages, with one package 'rc\_sf\_package' by RingCentral. A red arrow points from the 'Uninstall' link in this table to a callout box. The callout box, titled 'Installed Packages', shows a detailed view of the package with columns for Action, Package Name, Publisher, and Version.

Search Setup

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

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 manage 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	End Date
<a href="#">Uninstall</a>	<a href="#">rc_sf_package</a>	RingCentral	5.11	rcsfll	Active	Unlimited	0	

### Uninstalled Packages

No uninstalled package data archives

### Installed Packages

Action	Package Name	Publisher	Version
<a href="#">Uninstall</a>	<a href="#">rc_sf_package</a>	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)

Visualforce Pages

Visualforce Pages provide a robust and easy to use mechanism to create new and exciting user experiences.

View: All [Create New View](#)

Action	Label	Name	Namespace
Security	<a href="#">adminUI480</a>	<a href="#">adminUI480</a>	rscfl
Security	<a href="#">adminUI999</a>	<a href="#">adminUI999</a>	rscfl
Security	<a href="#">Phone Numbers Account 999</a>	<a href="#">Phone Numbers Account 999</a>	rscfl
Security	<a href="#">Phone Numbers Contact</a>	<a href="#">Phone Numbers Contact</a>	rscfl
Security	<a href="#">Phone Numbers Contact 999</a>	<a href="#">Phone Numbers Contact 999</a>	rscfl
Security	<a href="#">Phone Numbers Lead</a>	<a href="#">Phone Numbers Lead</a>	rscfl
Security	<a href="#">Phone Numbers Lead 999</a>	<a href="#">Phone Numbers Lead 999</a>	rscfl
Security	<a href="#">Phone Numbers SMS Account</a>	<a href="#">Phone Numbers SMS Account</a>	rscfl
Security	<a href="#">Phone Numbers SMS Account 999</a>	<a href="#">Phone Numbers SMS Account 999</a>	rscfl
Security	<a href="#">Phone Numbers SMS Contact</a>	<a href="#">Phone Numbers SMS Contact</a>	rscfl
Security	<a href="#">Phone Numbers SMS Contact 999</a>	<a href="#">Phone Numbers SMS Contact 999</a>	rscfl
Security	<a href="#">Phone Numbers SMS Lead</a>	<a href="#">Phone Numbers SMS Lead</a>	rscfl
Security	<a href="#">OpenCTIIndex999</a>	<a href="#">OpenCTIIndex999</a>	rscfl
Security	<a href="#">Initialize</a>	<a href="#">Initialize</a>	rscfl
Security	<a href="#">Initialize999</a>	<a href="#">Initialize999</a>	rscfl
Security	<a href="#">OpenCTIIndex999</a>	<a href="#">OpenCTIIndex999</a>	rscfl
Security	<a href="#">Phone Numbers Account</a>	<a href="#">Phone Numbers Account</a>	rscfl

Click here

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)

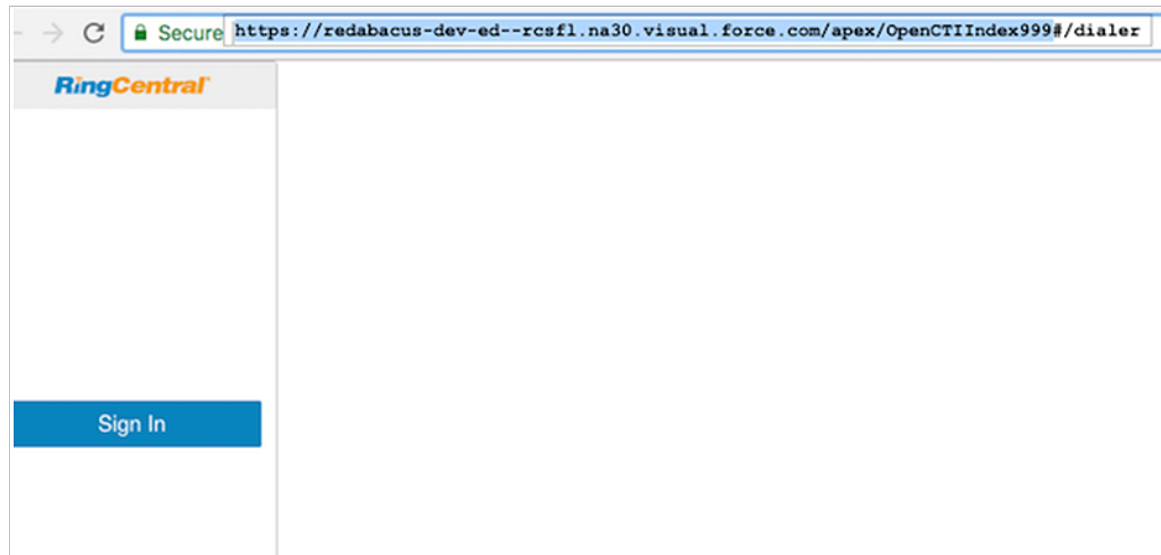


Figure 10

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

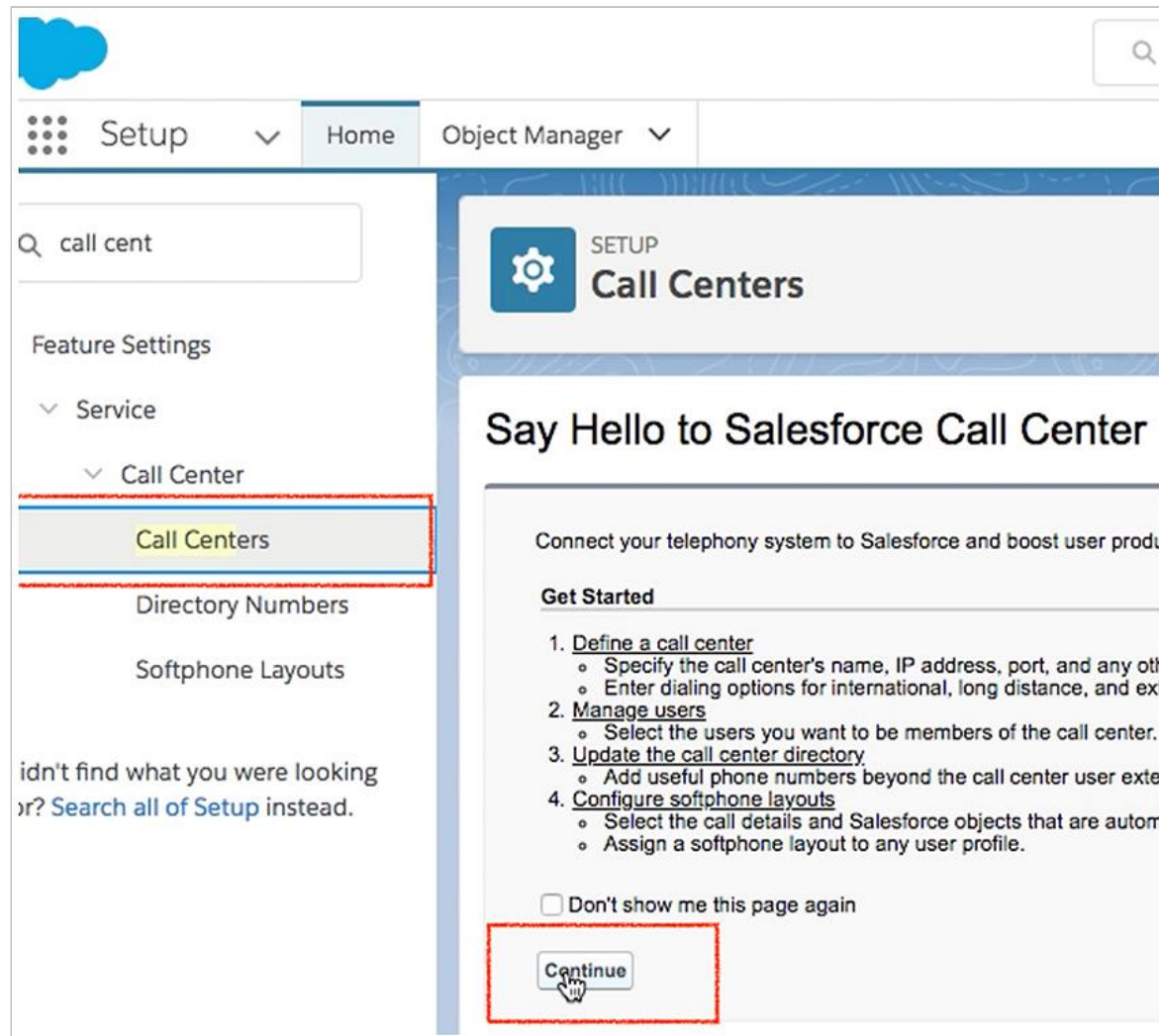


Figure 11

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

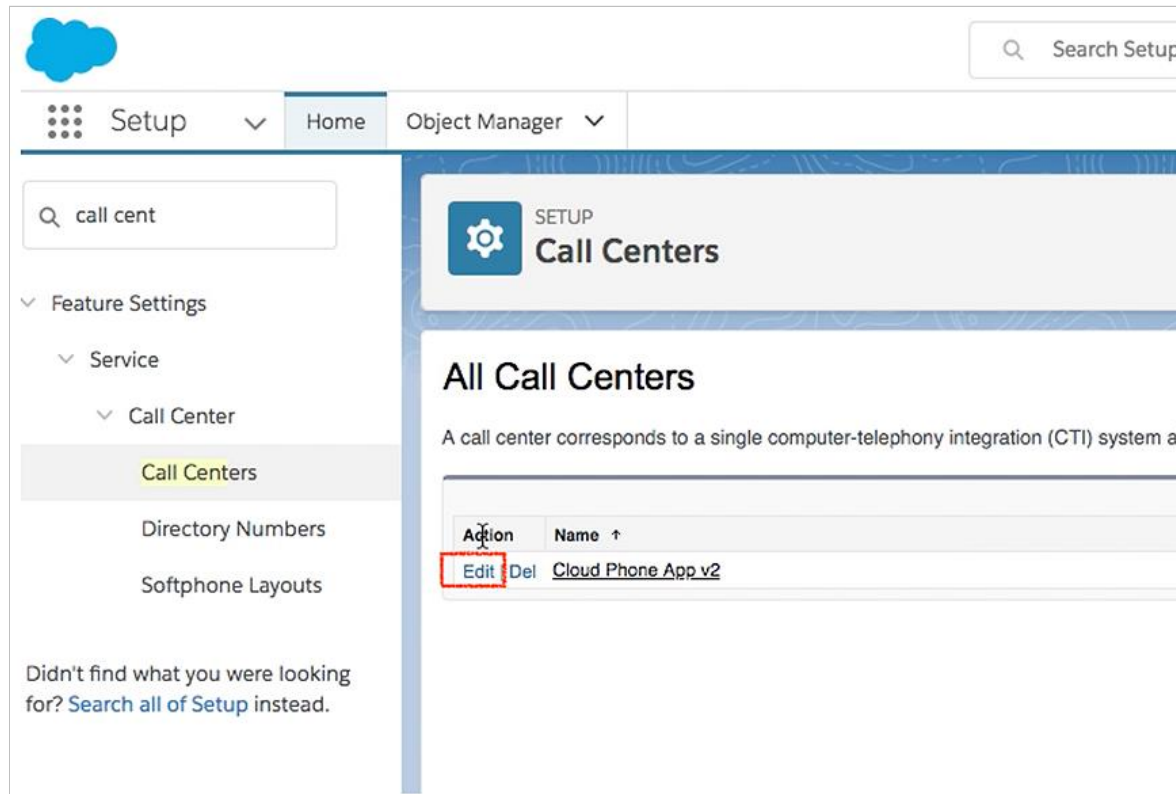
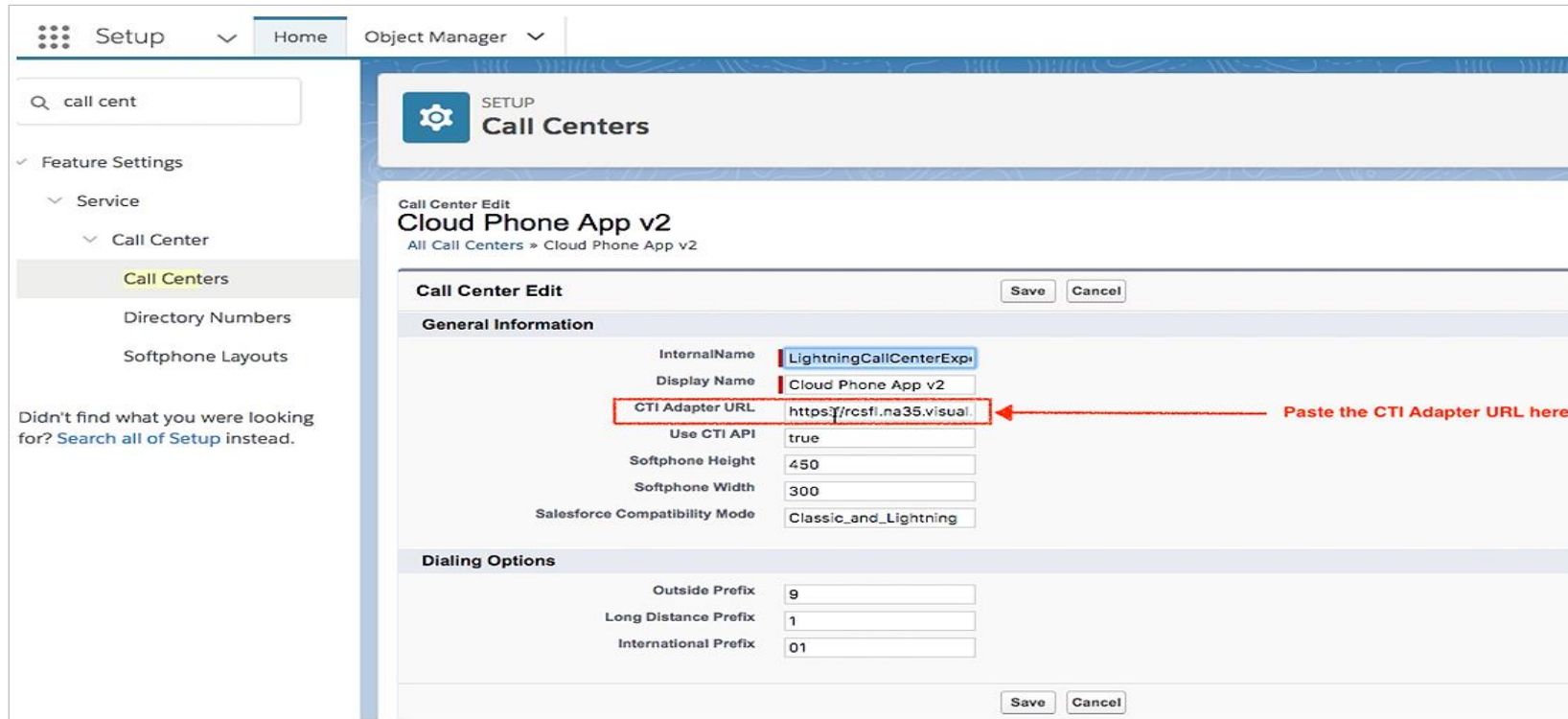


Figure 12

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



Setup Home Object Manager

Q call cent

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 Edit  
Cloud Phone App v2  
All Call Centers » Cloud Phone App v2

Call Center Edit Save Cancel

General Information

InternalName LightningCallCenterExp

Display Name Cloud Phone App v2

CTI Adapter URL https://rcsfl.na35.visual Paste the CTI Adapter URL here

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

Save Cancel

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.)

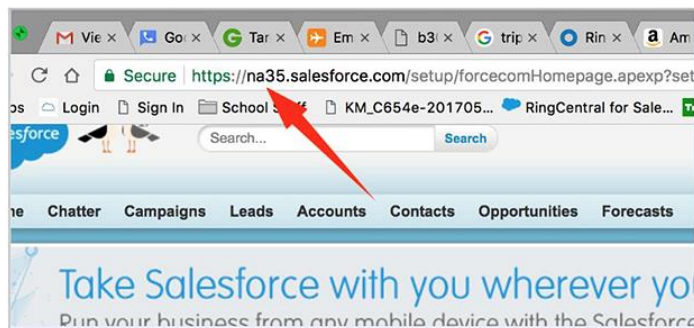


Figure 14

### Step 3: Add Users to the Call Center

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

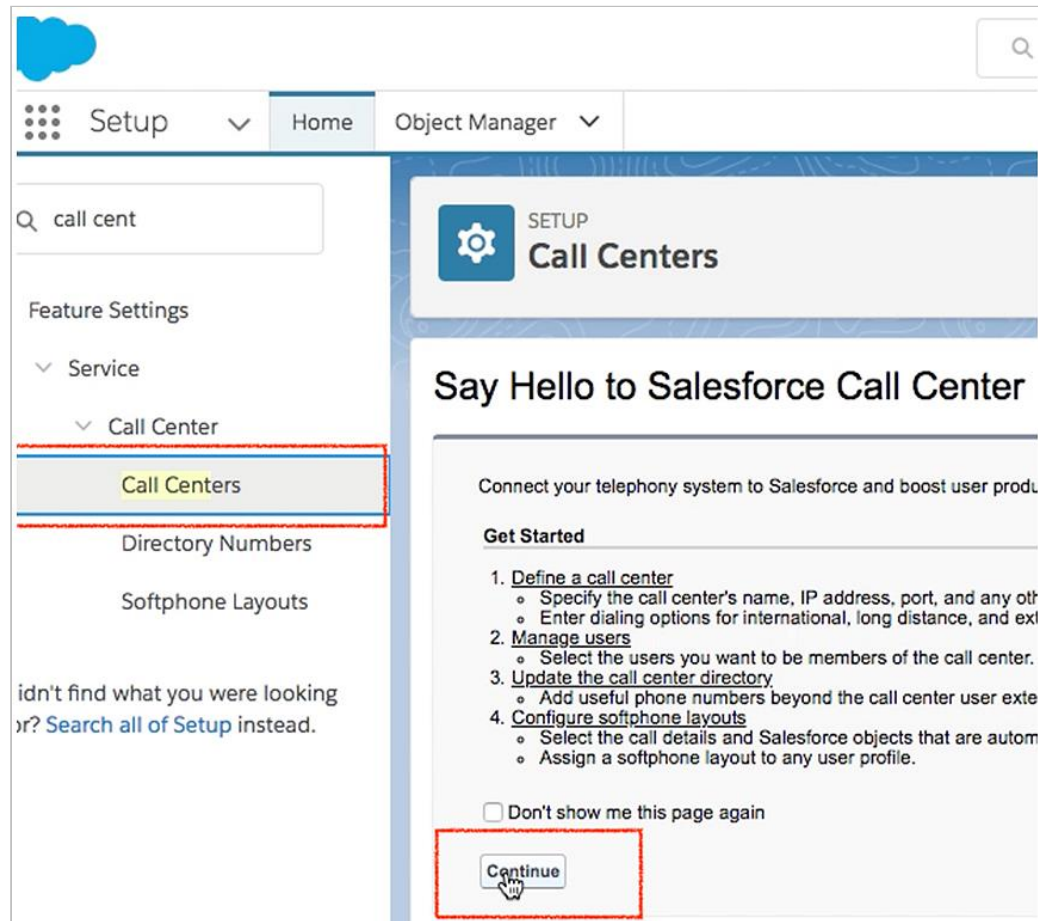


Figure 15



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.

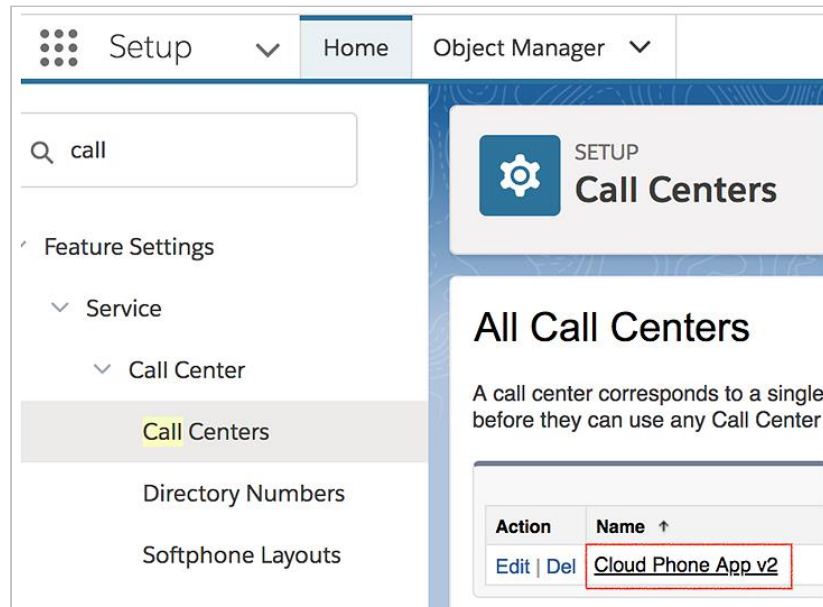
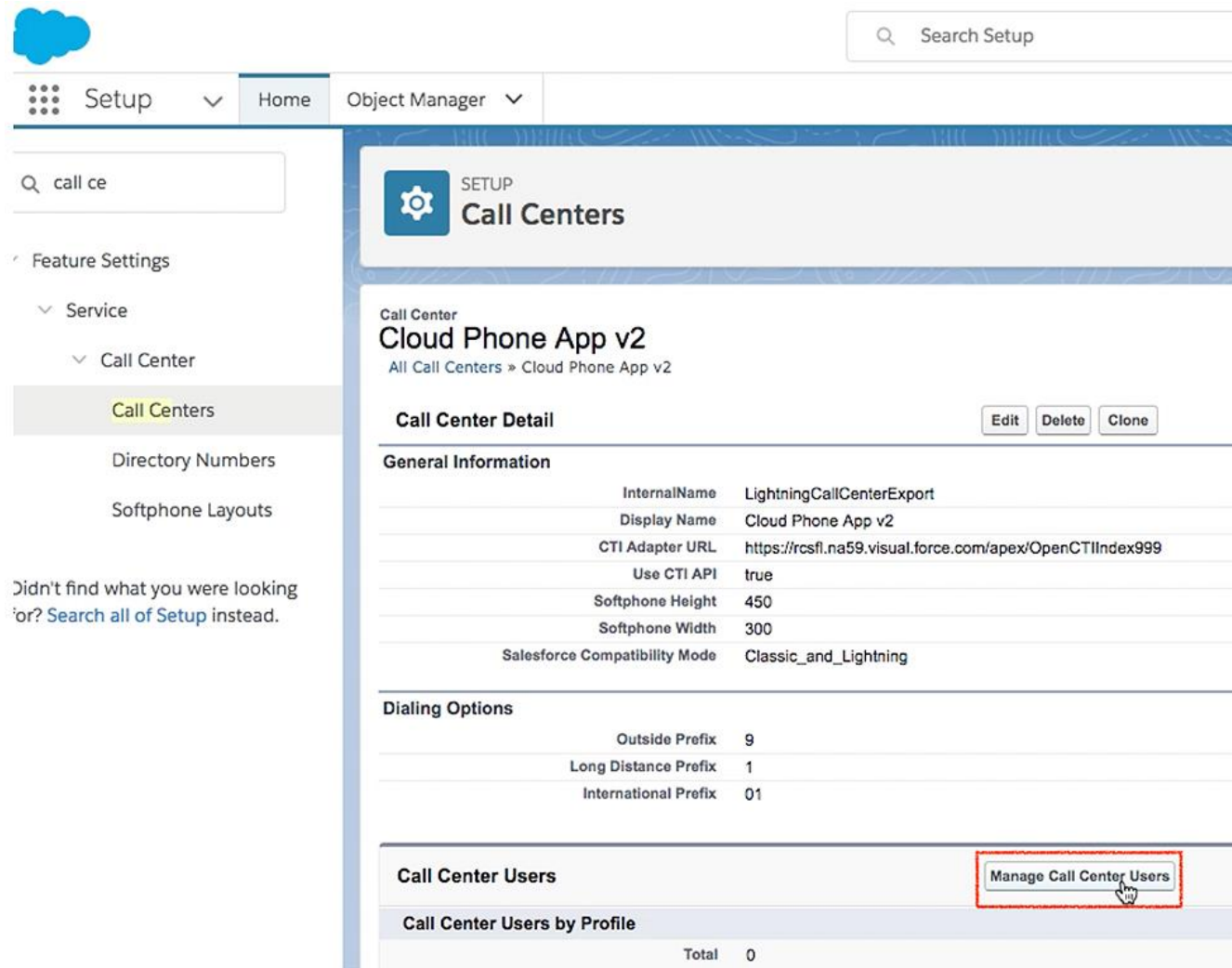


Figure 16

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.





Setup

Home Object Manager

Search Setup

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://rcsf1.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

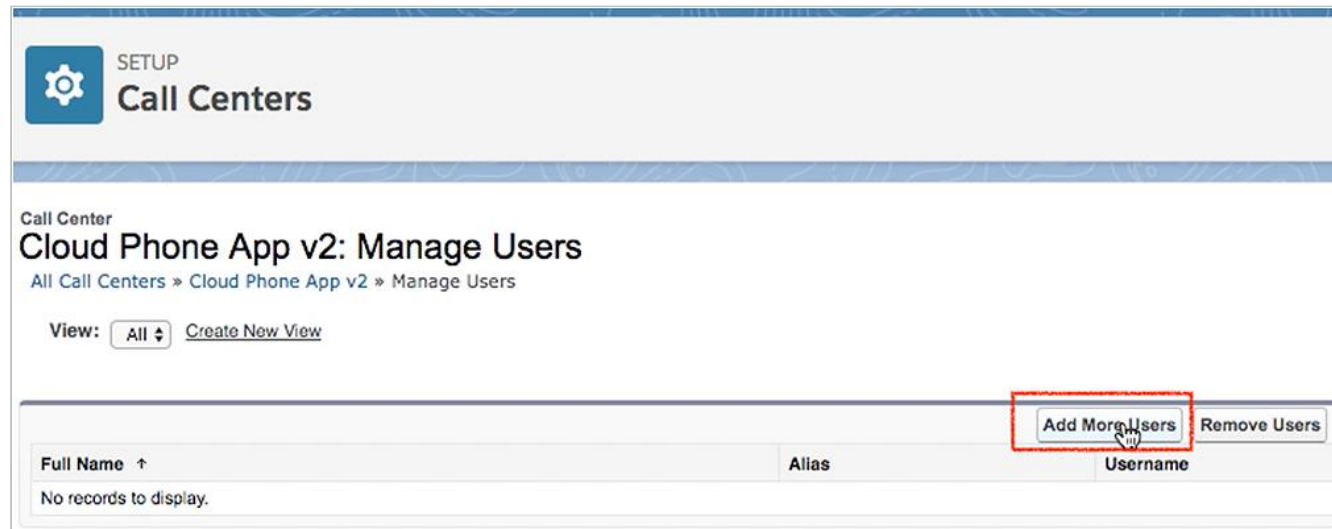


Figure 18

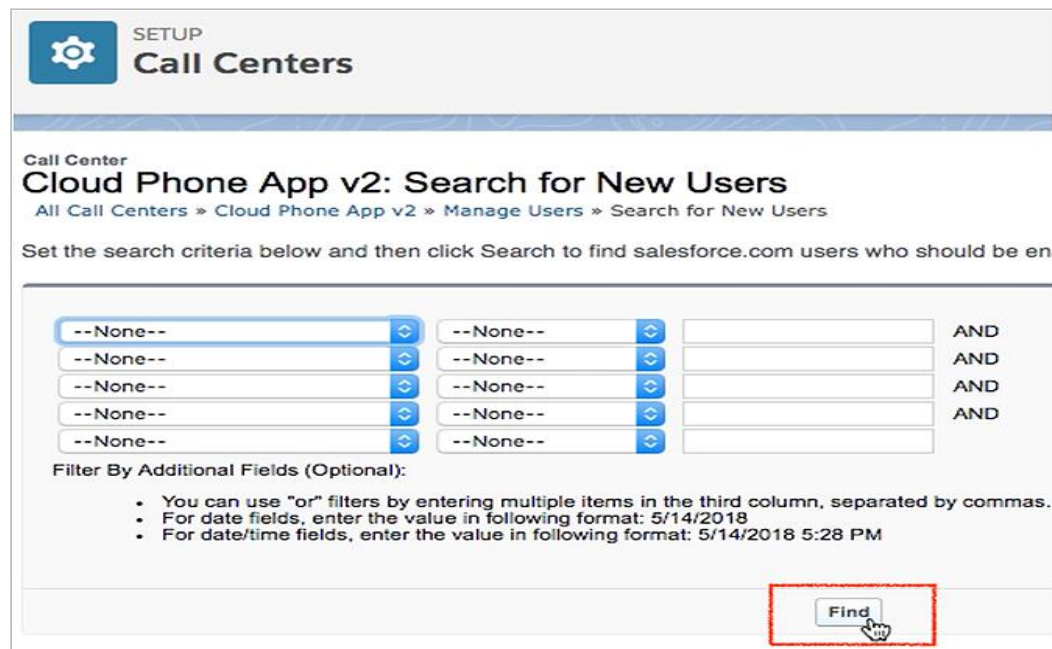
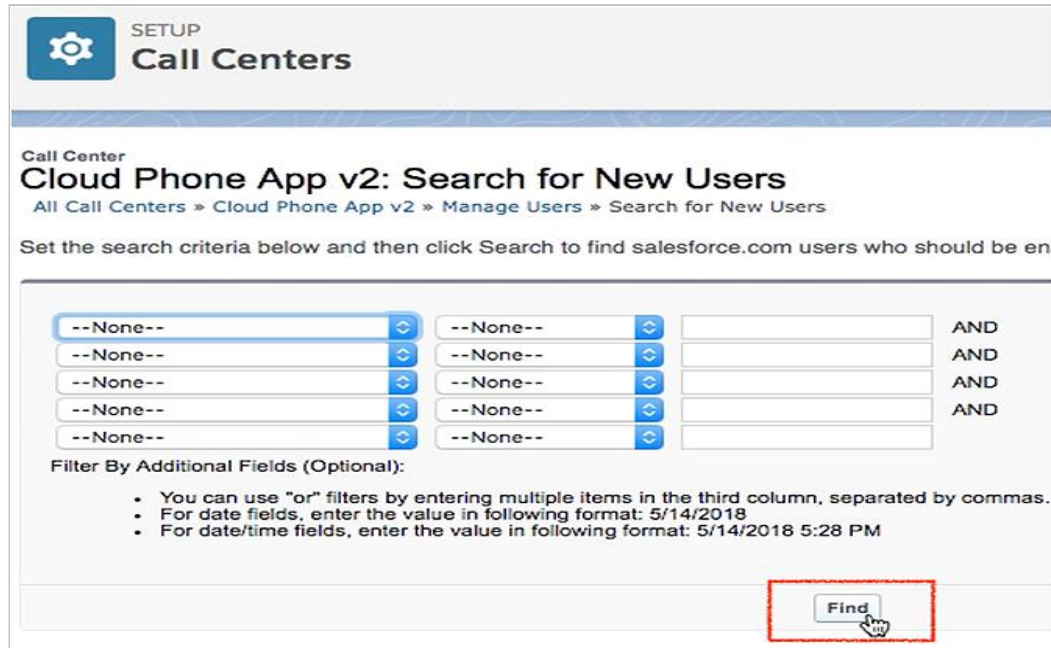


Figure 19

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



**SETUP**  
**Call Centers**

Call Center  
**Cloud Phone App v2: Search for New Users**  
All Call Centers » Cloud Phone App v2 » Manage Users » Search for New Users

Set the search criteria below and then click Search to find salesforce.com users who should be en.

--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 5/14/2018
- For date/time fields, enter the value in following format: 5/14/2018 5:28 PM

Find

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)

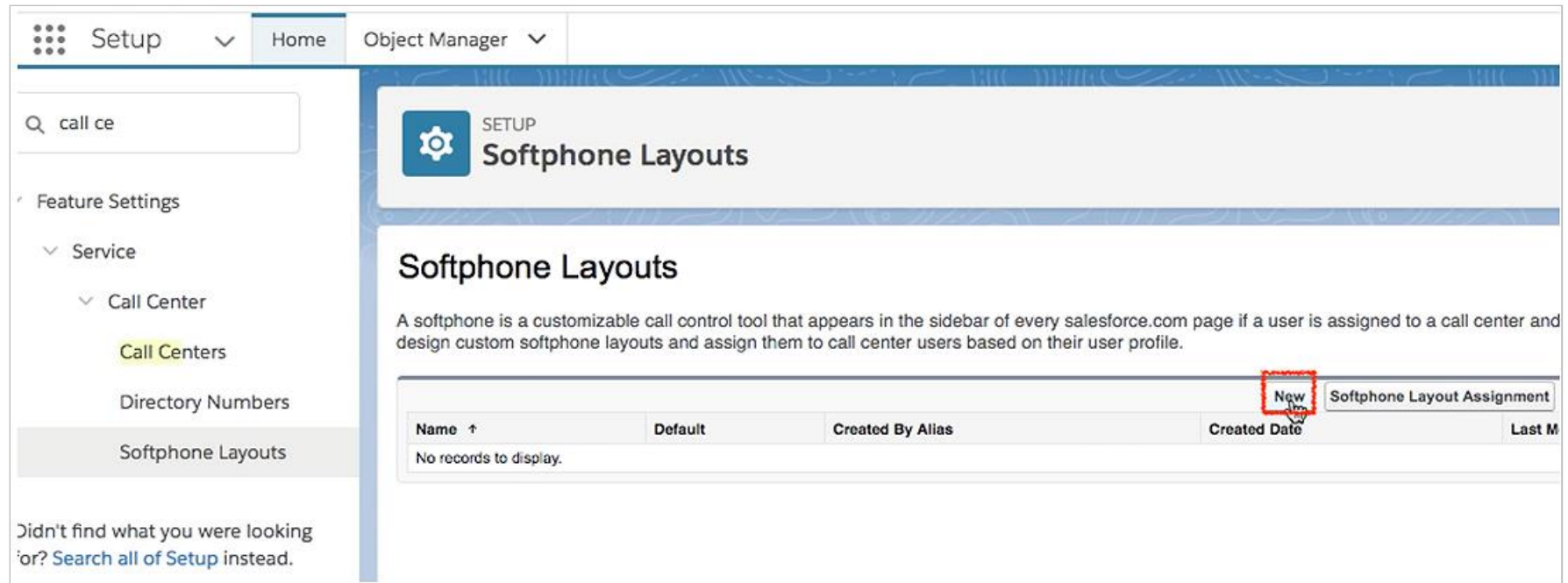



Figure 21

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.

SaveCancel

NameRingCentral SoftPhone I

☒ Is Default Layout

Select Call TypeInbound

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.

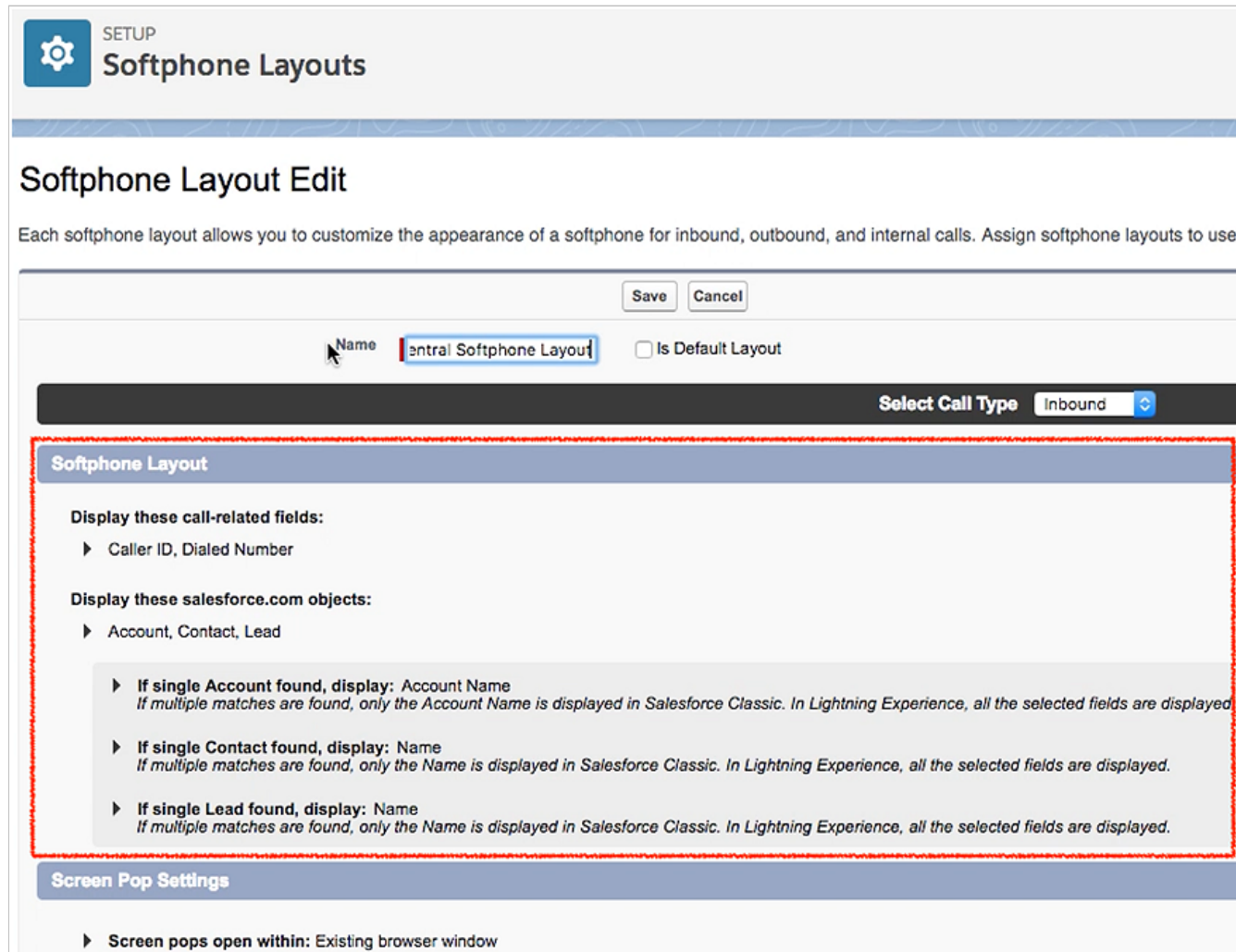
Edit

▶ 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.



**SETUP**  
**Softphone Layouts**

## Softphone Layout Edit

Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layouts to user

Name  ☐ Is Default Layout

Select Call Type

### 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 multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.*
- ▶ 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

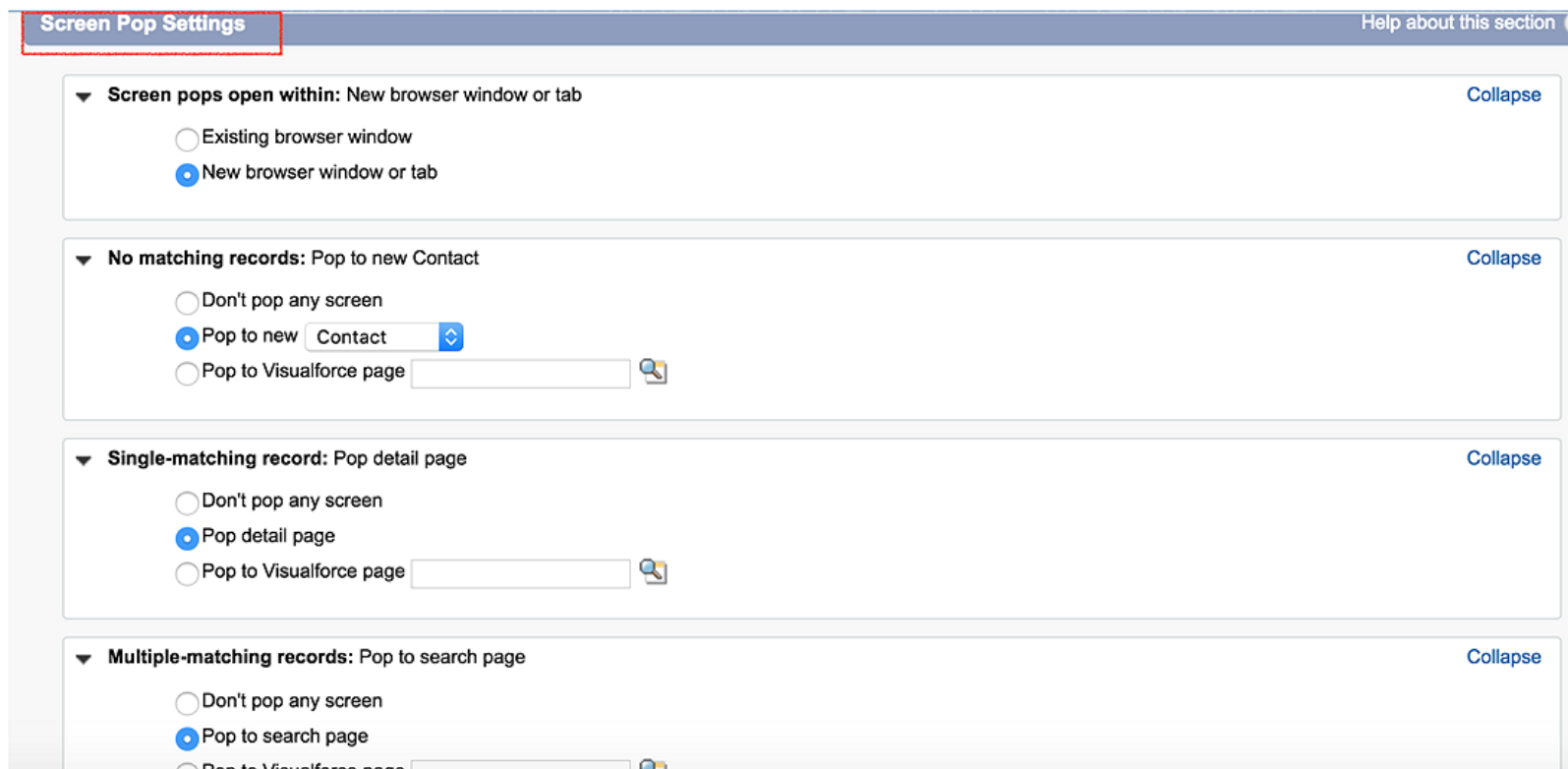
- ▶ Screen pops open within: Existing browser window

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.



**Screen Pop Settings** [Help about this section ?](#)

▼ **Screen pops open within: New browser window or tab** [Collapse](#)

☐ Existing browser window

☒ New browser window or tab

▼ **No matching records: Pop to new Contact** [Collapse](#)

☐ Don't pop any screen

☒ Pop to new Contact

☐ Pop to Visualforce page

▼ **Single-matching record: Pop detail page** [Collapse](#)

☐ Don't pop any screen

☒ Pop detail page

☐ Pop to Visualforce page

▼ **Multiple-matching records: Pop to search page** [Collapse](#)

☐ Don't pop any screen


☒ Pop to search page

☐ Pop to Visualforce page

Figure 24

Click **Save** to save the Softphone layout



 SETUP

## Softphone Layouts

### Softphone Layout Edit

Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layouts to softphones.

Save


Cancel

Name  ☒ Is Default Layout

Select Call Type

#### 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 multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.*
  - ▶ 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.

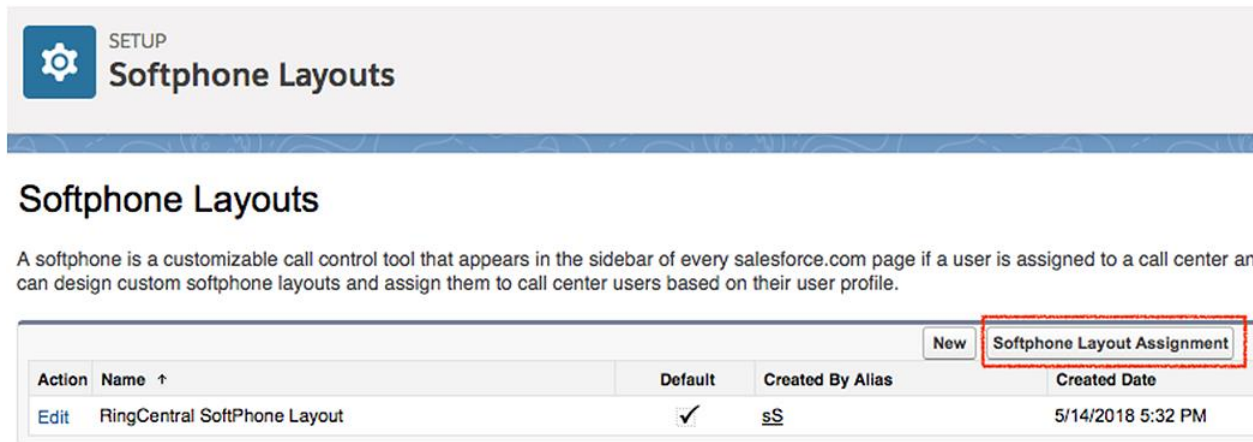


Figure 26

Assign the Softphone Layout to the relevant profiles.

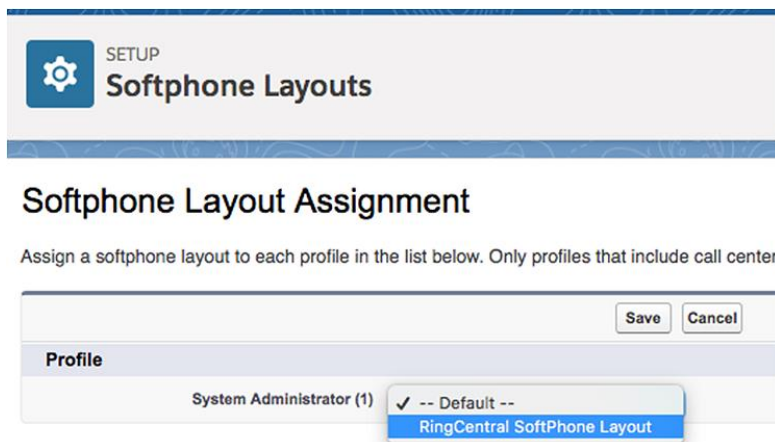


Figure 27

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](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.

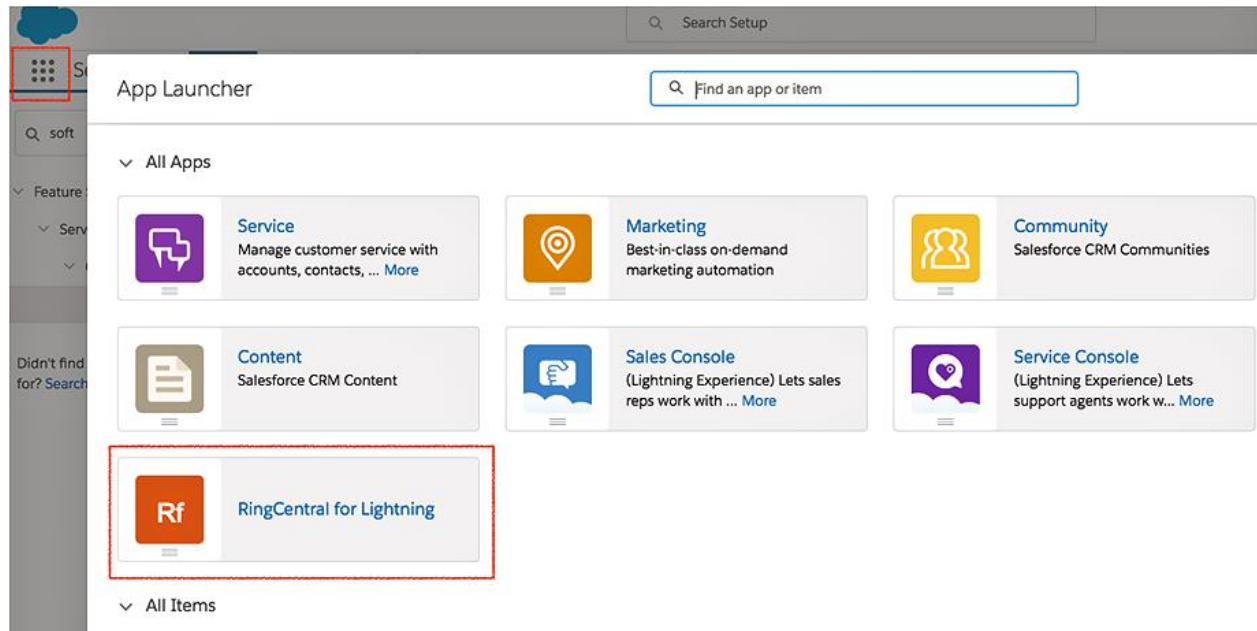


Figure 28

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

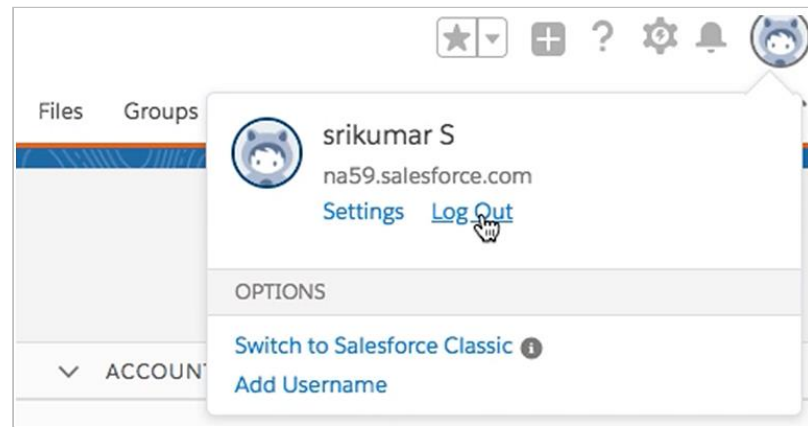


Figure 29

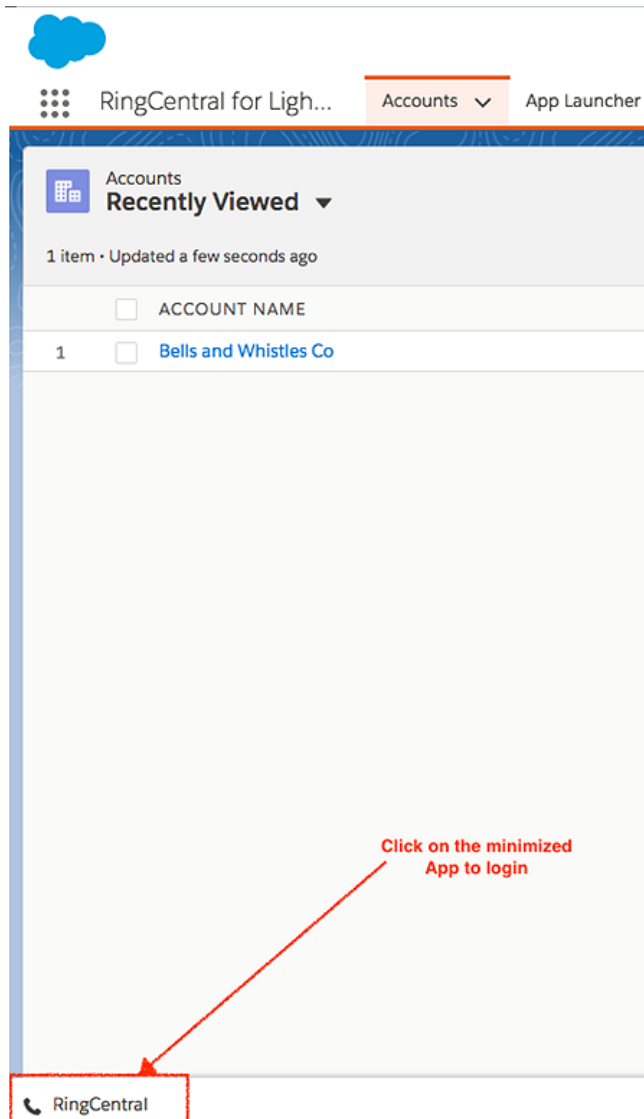


Figure 30

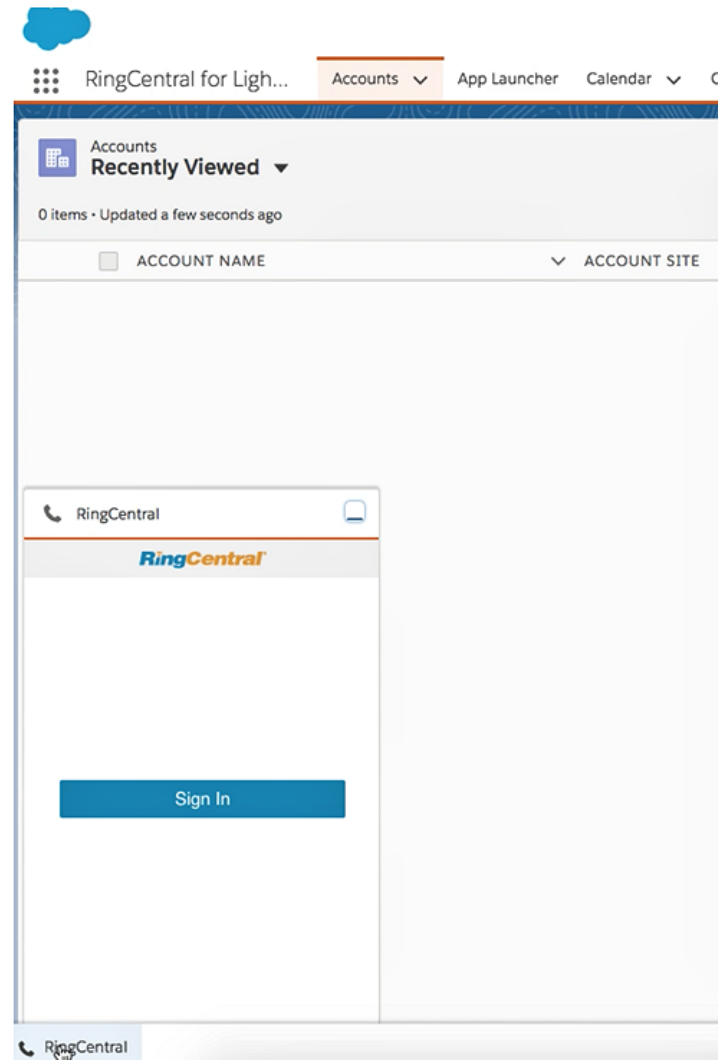


Figure 31

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.

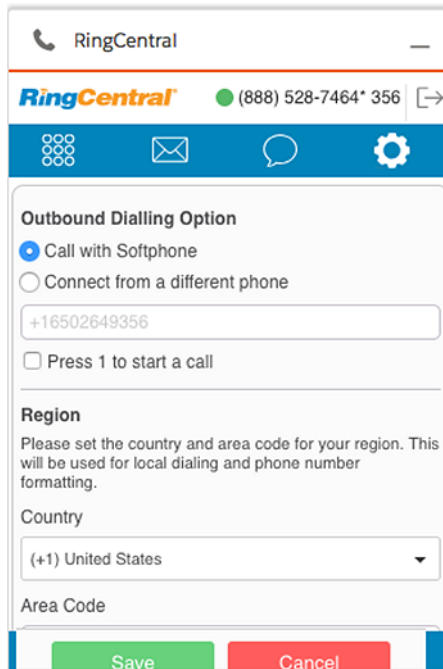



Figure 32

## 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.

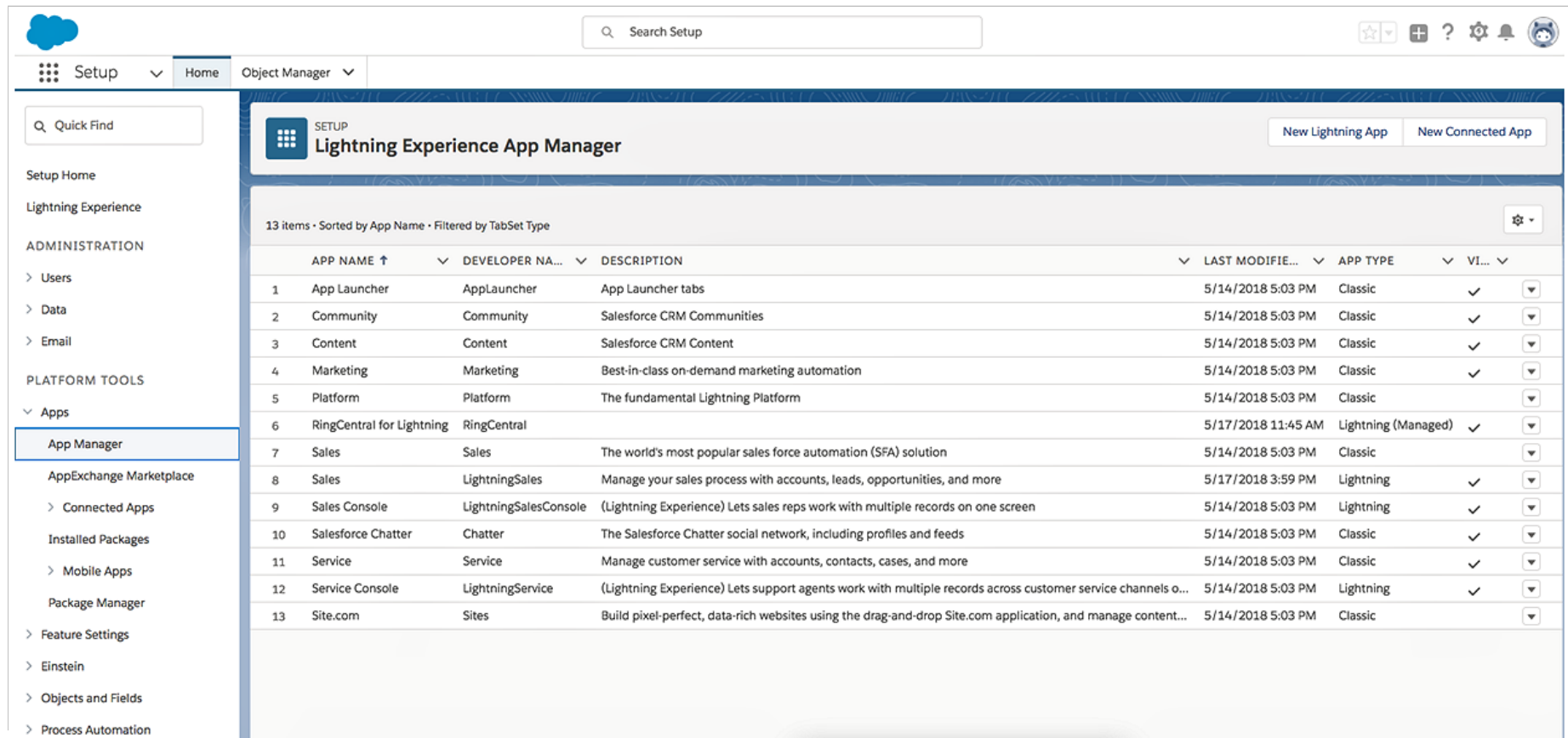
**Press 1 to start a call:** When you make an outgoing call from your specified phone number, RingCentral will first call you at your number. When you answer the call, you will have the option to press 1 before the call is connected to the other party. If this option is not enabled, RingCentral will 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 Lightning apps. Navigate to **All Setup > Apps > App Manager**.



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
- Process Automation

Search Setup

SETUP Lightning Experience App Manager


New Lightning App New Connected App

13 items - Sorted by App Name - Filtered by TabSet Type

	APP NAME ↑	DEVELOPER NA...	DESCRIPTION	LAST MODIFIE...	APP TYPE	VI...
1	App Launcher	AppLauncher	App Launcher tabs	5/14/2018 5:03 PM	Classic	✓
2	Community	Community	Salesforce CRM Communities	5/14/2018 5:03 PM	Classic	✓
3	Content	Content	Salesforce CRM Content	5/14/2018 5:03 PM	Classic	✓
4	Marketing	Marketing	Best-in-class on-demand marketing automation	5/14/2018 5:03 PM	Classic	✓
5	Platform	Platform	The fundamental Lightning Platform	5/14/2018 5:03 PM	Classic	✓
6	RingCentral for Lightning	RingCentral		5/17/2018 11:45 AM	Lightning (Managed)	✓
7	Sales	Sales	The world's most popular sales force automation (SFA) solution	5/14/2018 5:03 PM	Classic	✓
8	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	5/17/2018 3:59 PM	Lightning	✓
9	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	5/14/2018 5:03 PM	Lightning	✓
10	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	5/14/2018 5:03 PM	Classic	✓
11	Service	Service	Manage customer service with accounts, contacts, cases, and more	5/14/2018 5:03 PM	Classic	✓
12	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service channels o...	5/14/2018 5:03 PM	Lightning	✓
13	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and manage content...	5/14/2018 5:03 PM	Classic	✓

Figure 34

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


**SETUP**

[New Lightning App](#)
[New Connected App](#)

### Lightning Experience App Manager

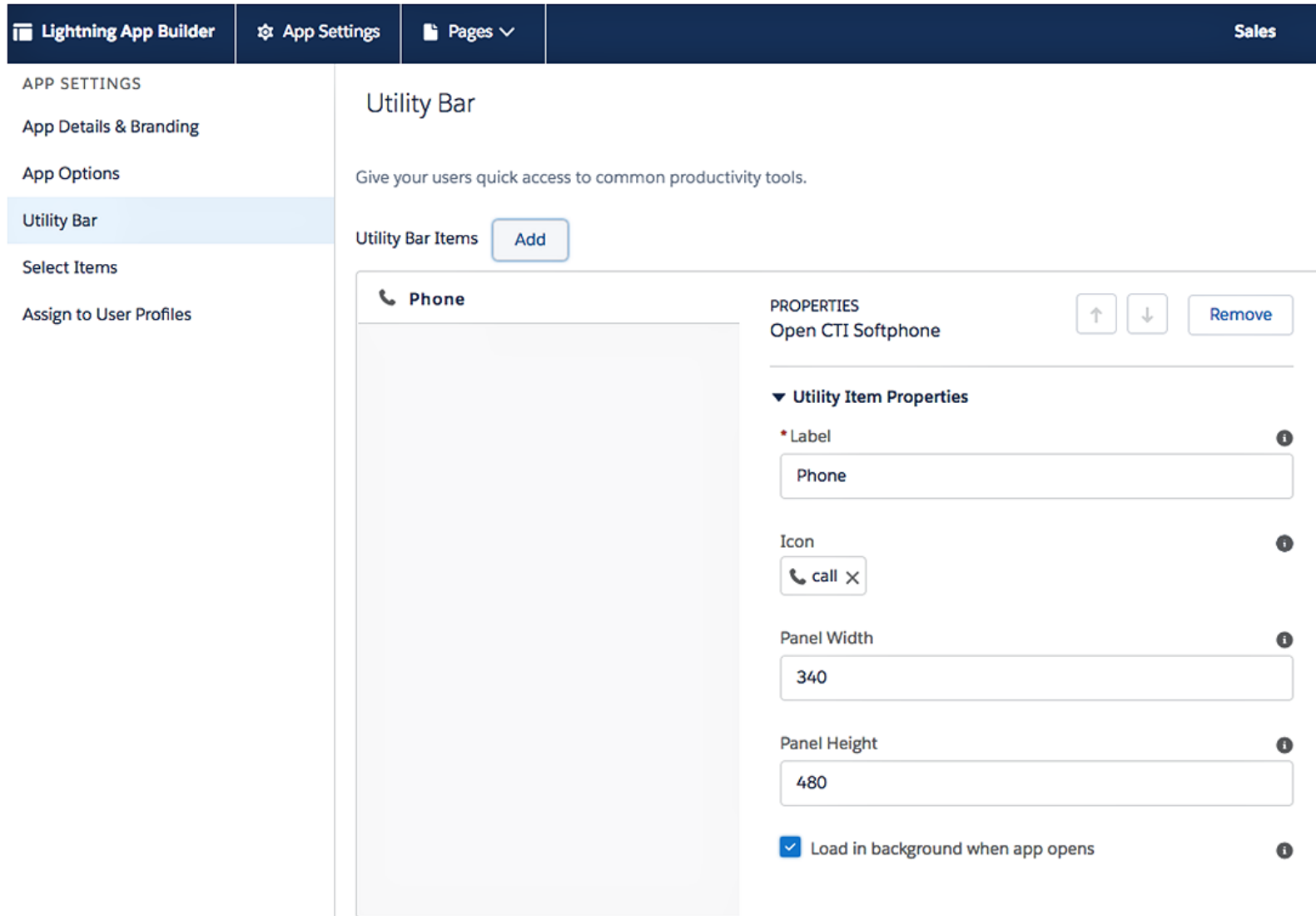
13 items • Sorted by App Name • Filtered by TabSet Type •

APP NAME ↑	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED ...	APP TYPE	VISIBLE IN LIGHT...	
Community	Community	Salesforce CRM Com...	2/2/2017 6:43 PM	Classic	✓	▼
Content	Content	Salesforce CRM Cont...	2/2/2017 6:43 PM	Classic	✓	▼
Marketing	Marketing	Best-in-class on-dem...	2/2/2017 6:43 PM	Classic	✓	▼
Platform	Platform	The fundamental For...	2/2/2017 6:43 PM	Classic		▼
RingCentral for Lightning	RingCentral		2/2/2017 6:54 PM	Lightning (Managed)	✓	▼
Sales	Sales	The world's most pop..	2/2/2017 6:43 PM	Classic		▼
Sales	LightningSales	Manage your sales pr...	2/14/2017 7:21 PM	Lightning	✓	▼
Sales Console	LightningSalesConsole	(Lightning Experienc...	2/14/2017 5:42 PM	Lightning	✓	▼
Salesforce Chatter	Chatter	The Salesforce Chatt...	2/2/2017 6:43 PM	Classic	✓	▼
Service	Service	Manage customer se...	2/2/2017 6:43 PM	Classic	✓	▼

[Edit](#)

Figure 35

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



The screenshot shows the Lightning App Builder interface. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Sales'. The left sidebar lists 'APP SETTINGS' with sub-items: 'App Details & Branding', 'App Options', 'Utility Bar' (highlighted), 'Select Items', and 'Assign to User Profiles'. The main content area is titled 'Utility Bar' and contains the instruction 'Give your users quick access to common productivity tools.' Below this is a section 'Utility Bar Items' with an 'Add' button. A single item, 'Phone', is displayed in a list on the left. To its right, the 'PROPERTIES' panel for 'Open CTI Softphone' is shown, featuring up/down arrows and a 'Remove' button. The 'Utility Item Properties' section includes fields for 'Label' (set to 'Phone'), 'Icon' (set to a call icon), 'Panel Width' (set to 340), and 'Panel Height' (set to 480). A checkbox 'Load in background when app opens' is checked.

**Lightning App Builder** | **App Settings** | **Pages** | **Sales**


**APP SETTINGS**

- App Details & Branding
- App Options
- Utility Bar**
- Select Items
- Assign to User Profiles

### Utility Bar

Give your users quick access to common productivity tools.

Utility Bar Items [Add](#)

 **Phone**

**PROPERTIES**

Open CTI Softphone

↑ ↓ [Remove](#)

---

▼ **Utility Item Properties**

\*Label ⓘ

Phone

Icon ⓘ

call ×

Panel Width ⓘ

340

Panel Height ⓘ

480

☒ Load in background when app opens ⓘ

Figure 36

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

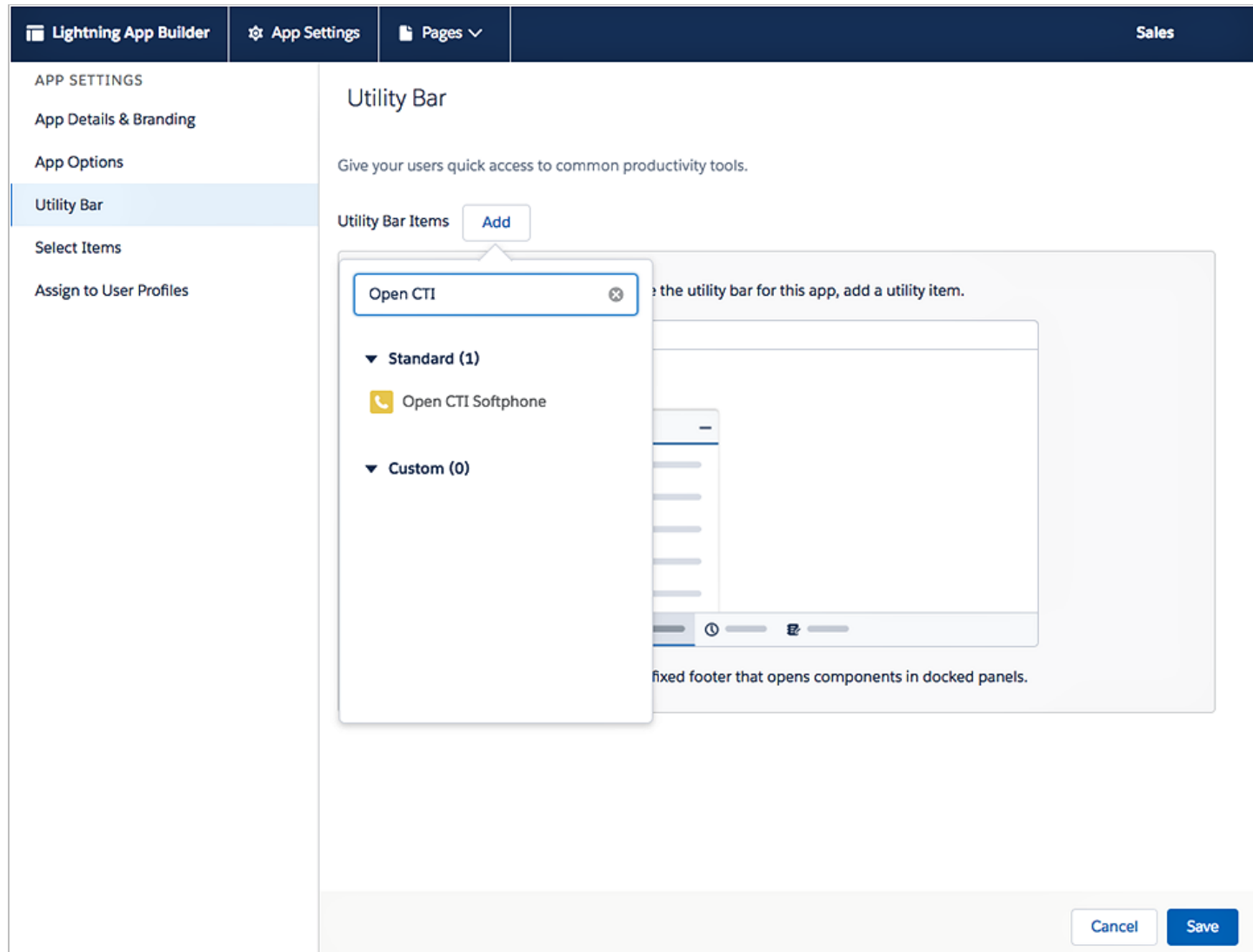
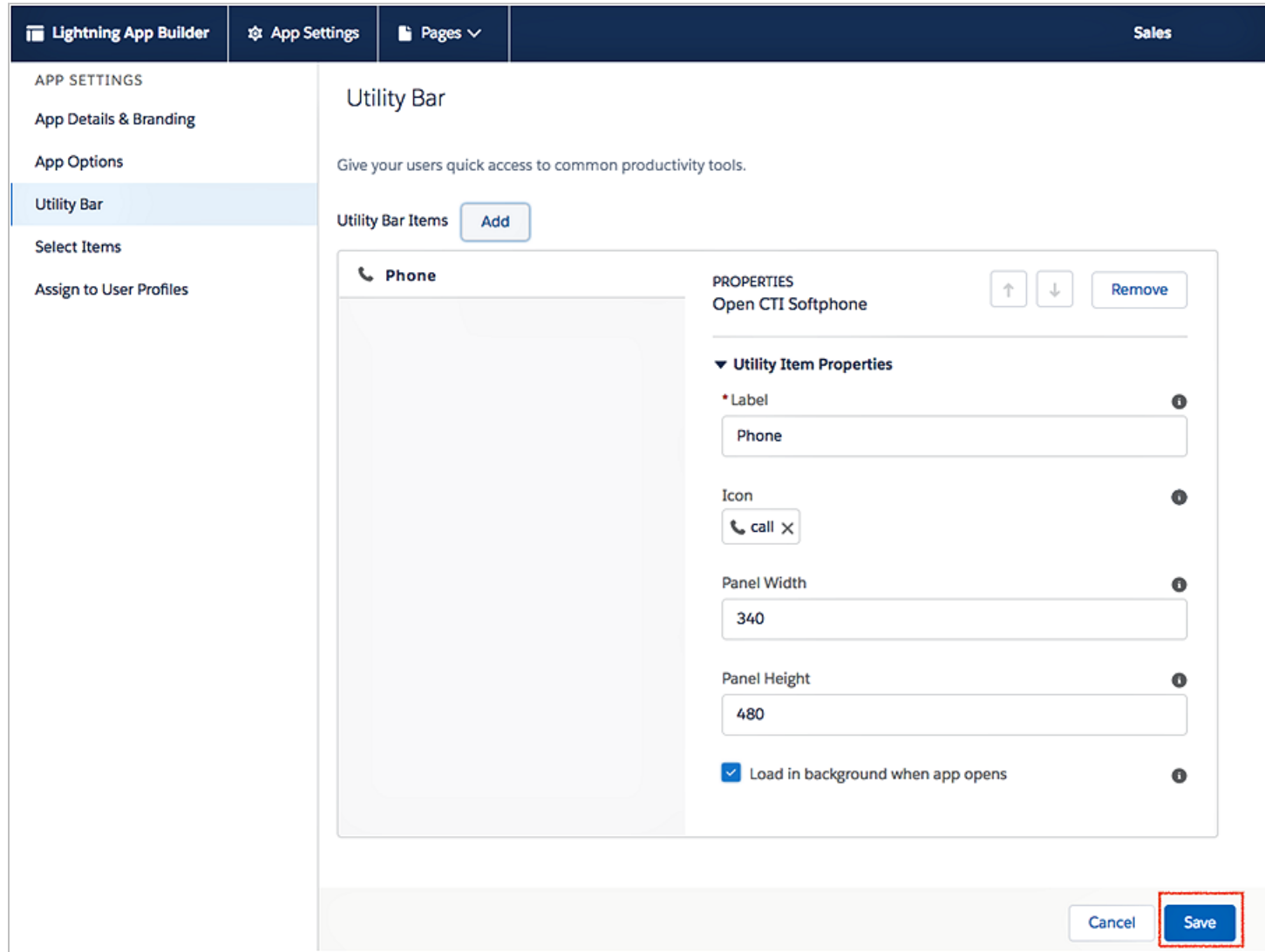


Figure 37



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

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



**Lightning App Builder** | **App Settings** | **Pages** | **Sales**


**APP SETTINGS**

- App Details & Branding
- App Options
- Utility Bar**
- Select Items
- Assign to User Profiles

### Utility Bar

Give your users quick access to common productivity tools.

Utility Bar Items **Add**

 **Phone**

**PROPERTIES** Open CTI Softphone **↑** **↓** **Remove**

▼ **Utility Item Properties**

\* **Label** ⓘ

Phone

**Icon** ⓘ

call ×

**Panel Width** ⓘ

340

**Panel Height** ⓘ

480

☒ **Load in background when app opens** ⓘ

**Cancel** **Save**

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)

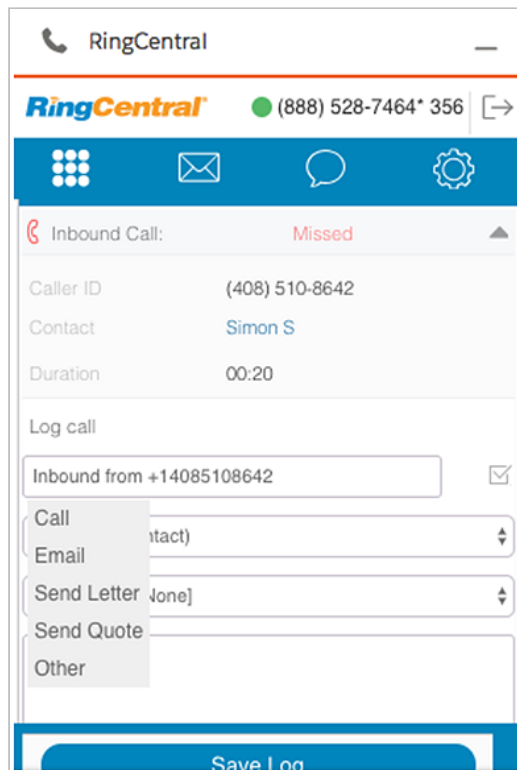


Figure 39

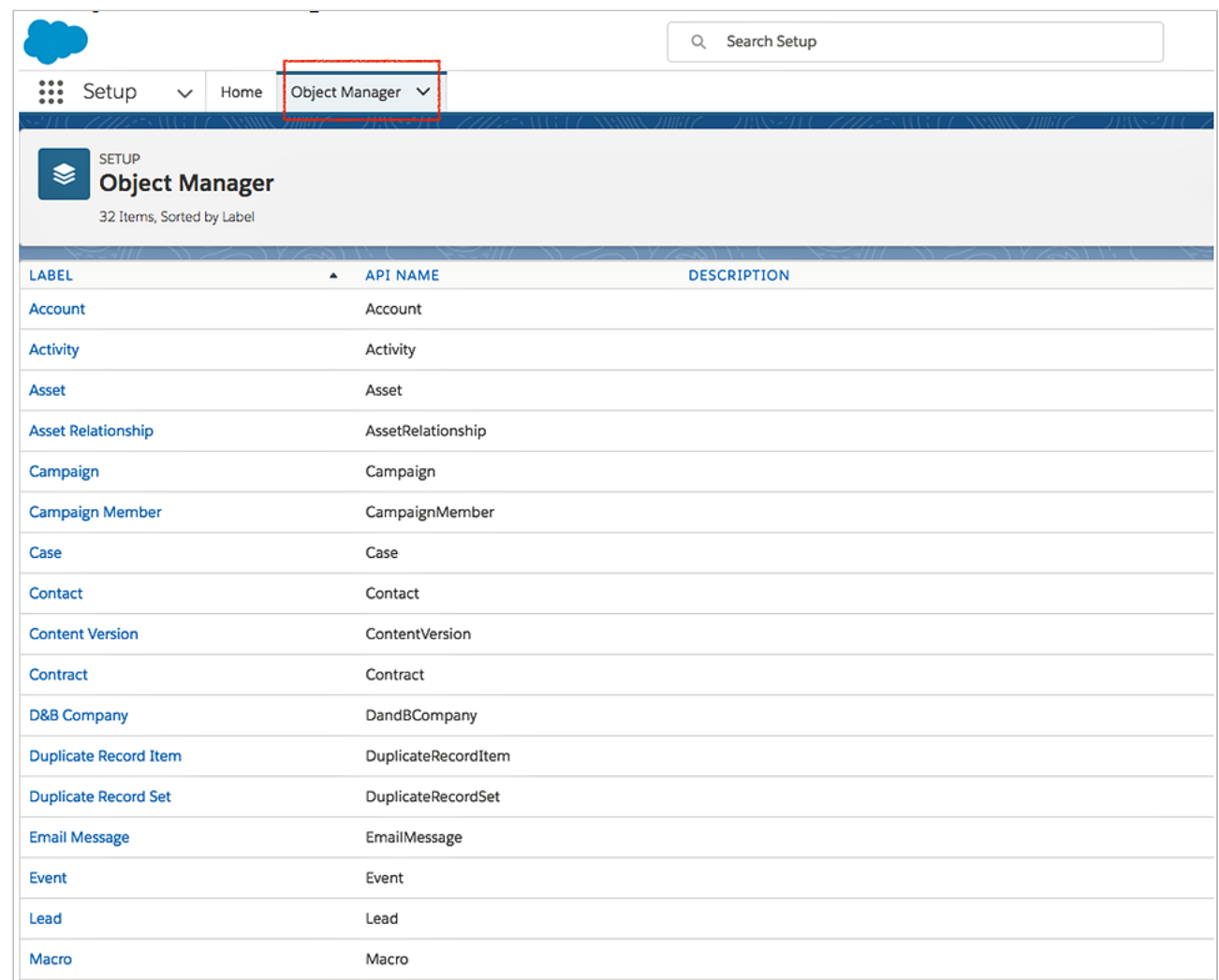
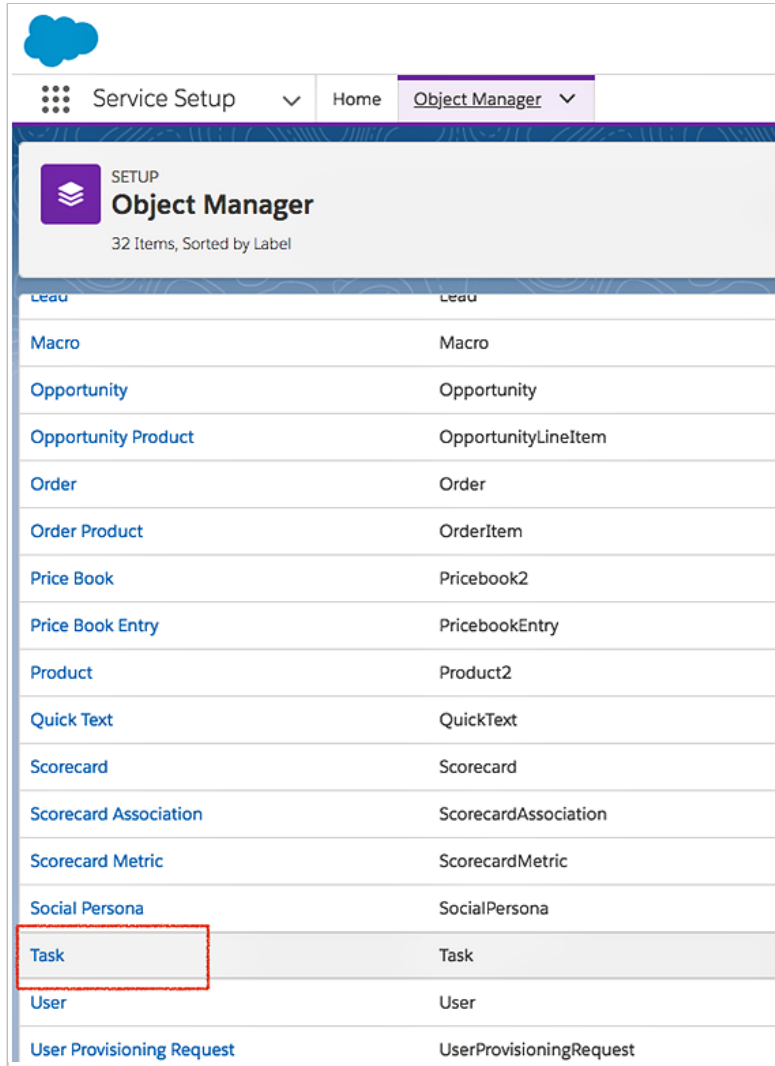


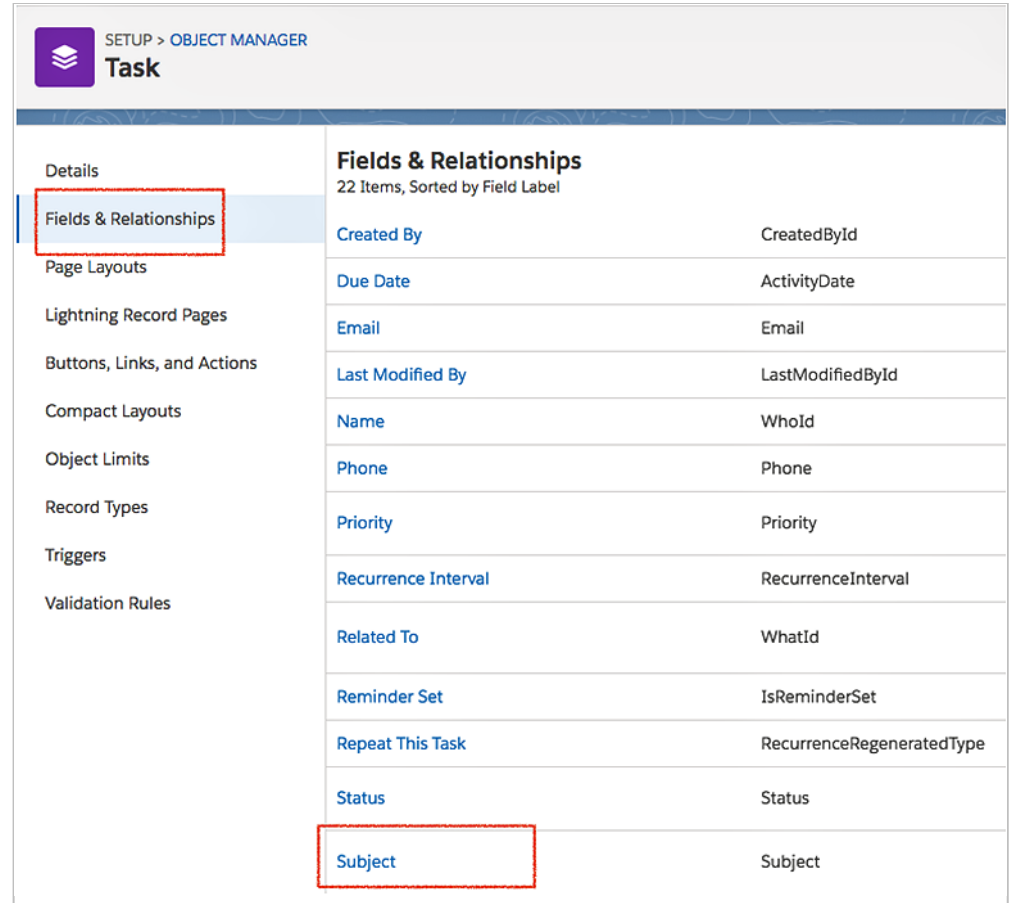
Figure 40

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)




SETUP Object Manager	
32 Items, Sorted by Label	
Lead	Lead
Macro	Macro
Opportunity	Opportunity
Opportunity Product	OpportunityLineItem
Order	Order
Order Product	OrderItem
Price Book	Pricebook2
Price Book Entry	PricebookEntry
Product	Product2
Quick Text	QuickText
Scorecard	Scorecard
Scorecard Association	ScorecardAssociation
Scorecard Metric	ScorecardMetric
Social Persona	SocialPersona
<b>Task</b>	<b>Task</b>
User	User
User Provisioning Request	UserProvisioningRequest

Figure 41



SETUP > OBJECT MANAGER Task																											
Details	<b>Fields &amp; Relationships</b> 22 Items, Sorted by Field Label																										
Page Layouts																											
Lightning Record Pages																											
Buttons, Links, and Actions																											
Compact Layouts																											
Object Limits																											
Record Types																											
Triggers																											
Validation Rules																											
	<table> <tbody> <tr><td>Created By</td><td>CreatedById</td></tr> <tr><td>Due Date</td><td>ActivityDate</td></tr> <tr><td>Email</td><td>Email</td></tr> <tr><td>Last Modified By</td><td>LastModifiedById</td></tr> <tr><td>Name</td><td>WhoId</td></tr> <tr><td>Phone</td><td>Phone</td></tr> <tr><td>Priority</td><td>Priority</td></tr> <tr><td>Recurrence Interval</td><td>RecurrenceInterval</td></tr> <tr><td>Related To</td><td>WhatId</td></tr> <tr><td>Reminder Set</td><td>IsReminderSet</td></tr> <tr><td>Repeat This Task</td><td>RecurrenceRegeneratedType</td></tr> <tr><td>Status</td><td>Status</td></tr> <tr><td><b>Subject</b></td><td>Subject</td></tr> </tbody> </table>	Created By	CreatedById	Due Date	ActivityDate	Email	Email	Last Modified By	LastModifiedById	Name	WhoId	Phone	Phone	Priority	Priority	Recurrence Interval	RecurrenceInterval	Related To	WhatId	Reminder Set	IsReminderSet	Repeat This Task	RecurrenceRegeneratedType	Status	Status	<b>Subject</b>	Subject
Created By	CreatedById																										
Due Date	ActivityDate																										
Email	Email																										
Last Modified By	LastModifiedById																										
Name	WhoId																										
Phone	Phone																										
Priority	Priority																										
Recurrence Interval	RecurrenceInterval																										
Related To	WhatId																										
Reminder Set	IsReminderSet																										
Repeat This Task	RecurrenceRegeneratedType																										
Status	Status																										
<b>Subject</b>	Subject																										

Figure 42

 **Task**

SETUP > OBJECT MANAGER

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Object Limits

Record Types

Triggers

Validation Rules

**Fields & Relationships**

22 Items, Sorted by Field Label

Created By	CreatedById
Due Date	ActivityDate
Email	Email
Last Modified By	LastModifiedById
Name	WhoId
Phone	Phone
Priority	Priority
Recurrence Interval	RecurrenceInterval
Related To	WhatId
Reminder Set	IsReminderSet
Repeat This Task	RecurrenceRegeneratedType
Status	Status
Subject	Subject

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.

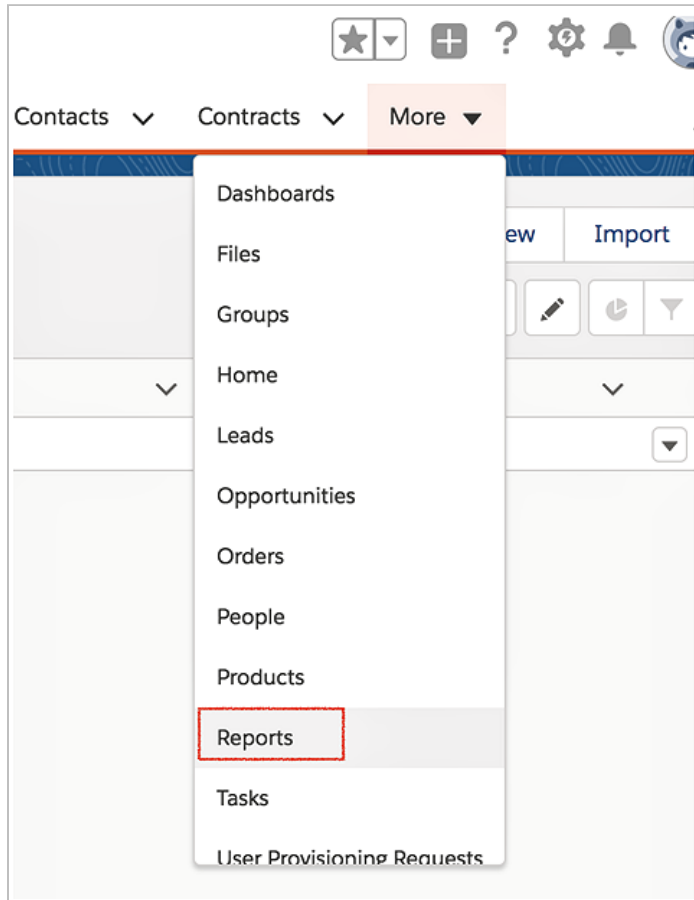


Figure 44

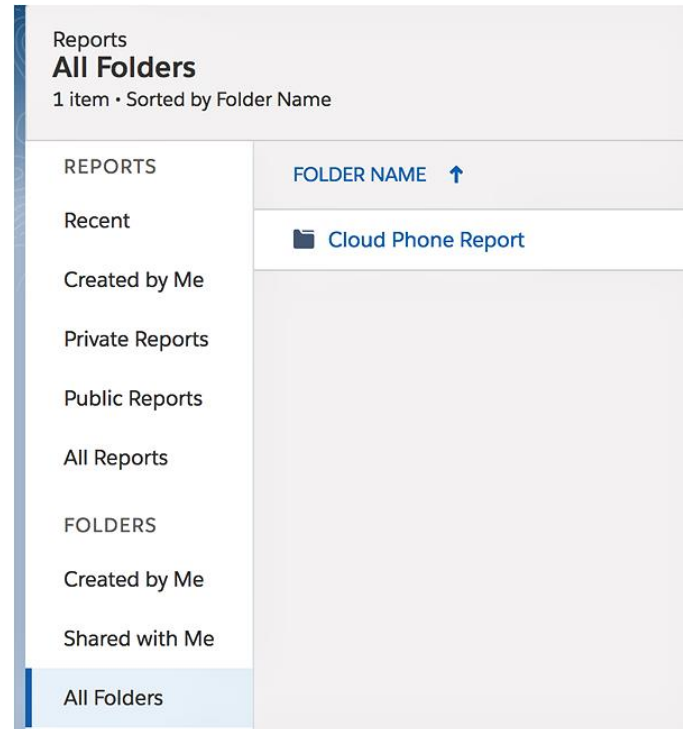


Figure 45

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)

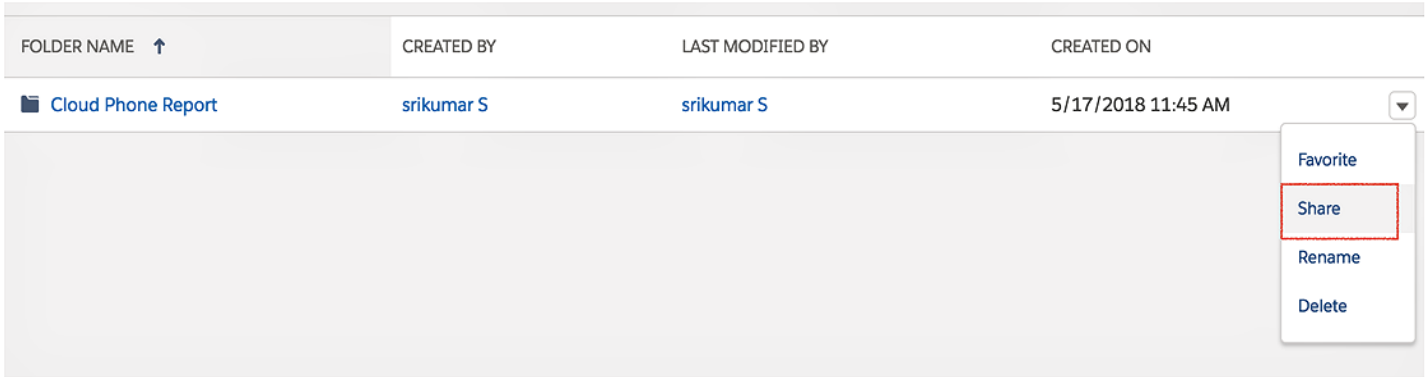


Figure 46

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

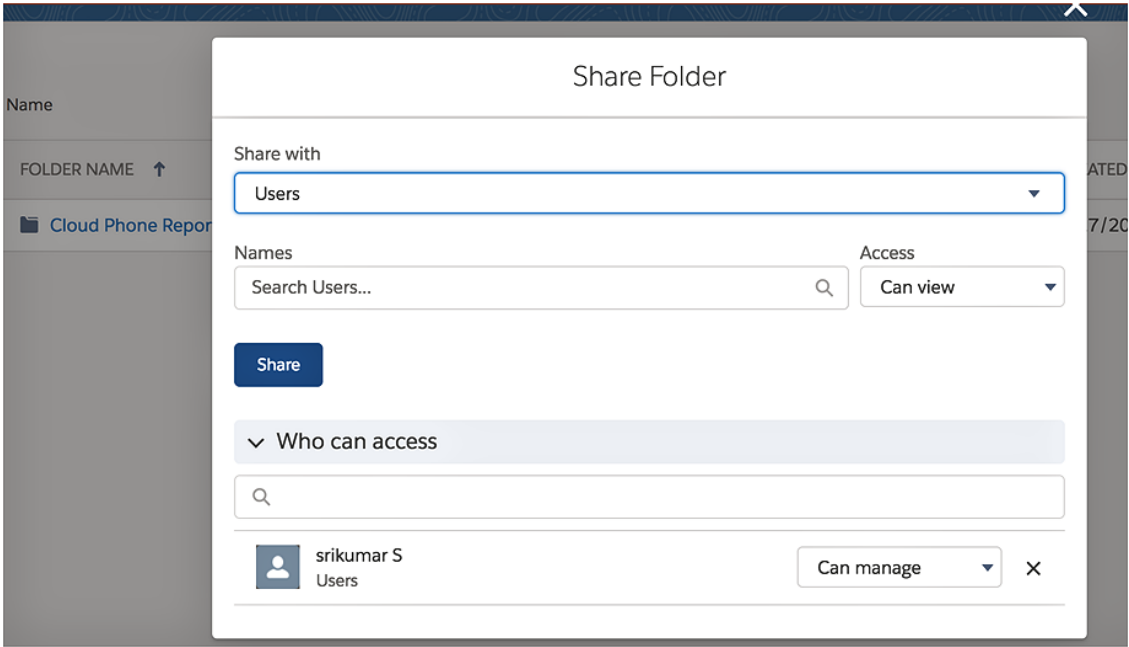
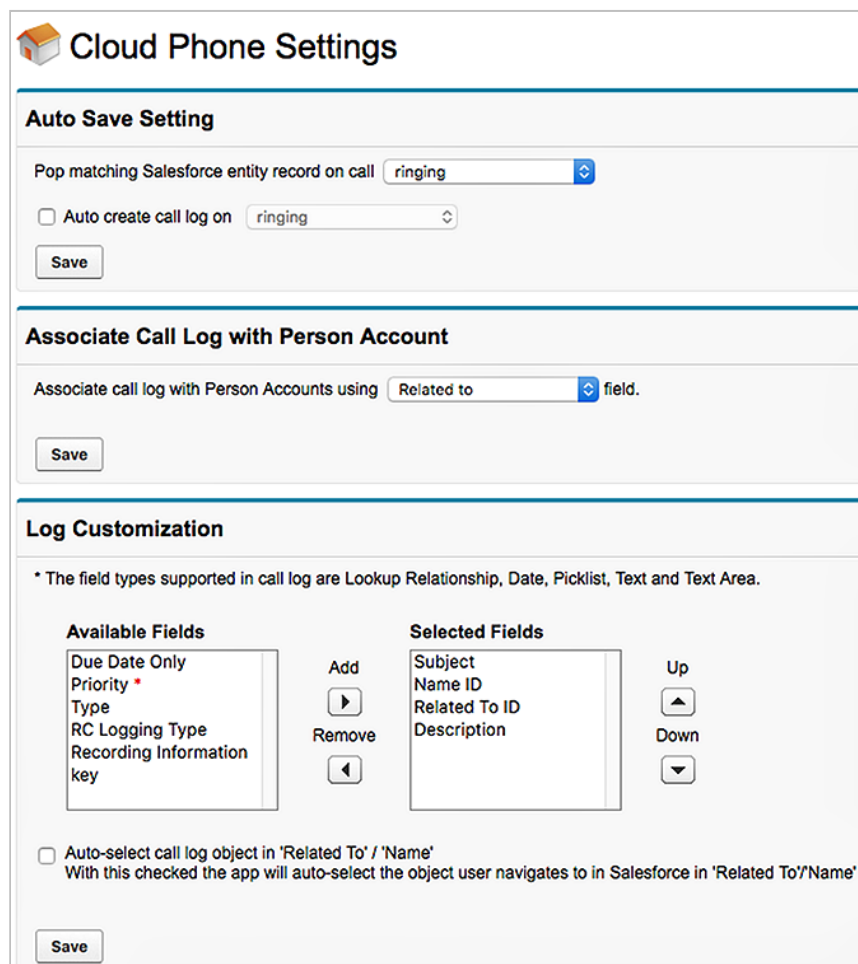


Figure 47

## 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](https://ap2.salesforce.com/apex/rcsf_adminUI999). You'll 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 using Related to field.

**Save**

**Log Customization**

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

**Available Fields**

- Due Date Only
- Priority
- Type
- RC Logging Type
- Recording Information
- key

**Selected Fields**

- Subject
- Name ID
- Related To ID
- Description

**Add** **Remove** **Up** **Down**

☐ 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'

**Save**

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'**.

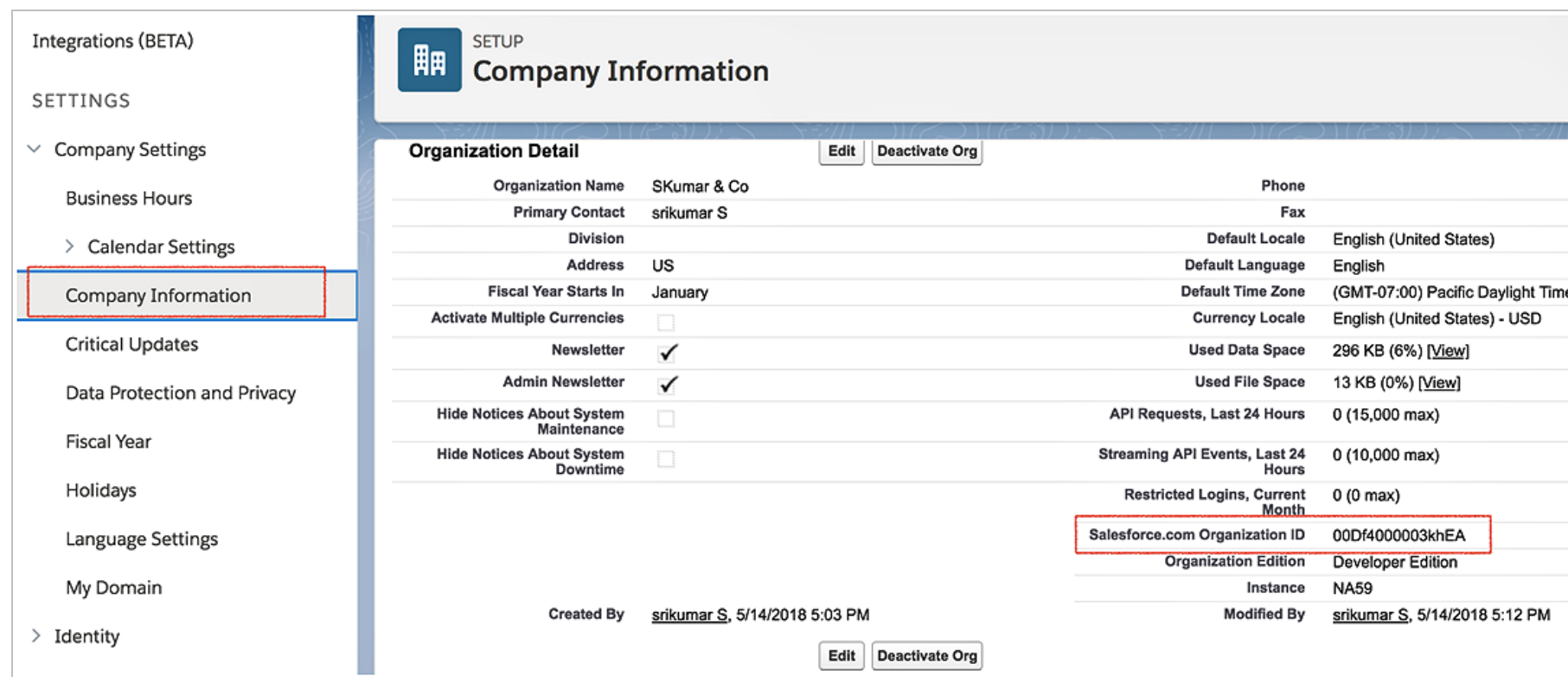
If the user navigates away to view some other record, the record the user views will override the previous auto-selected value in **'Related To' / 'Name'**. The user could manually select a record in **'Related To' / 'Name'** dropdown; the app will not change what the user manually selects even if he/she 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)



**Integrations (BETA)**

**SETTINGS**

- Company Settings
  - Business Hours
  - Calendar Settings
  - Company Information**
  - Critical Updates
  - Data Protection and Privacy
  - Fiscal Year
  - Holidays
  - Language Settings
  - My Domain
  - Identity

**SETUP Company Information**

**Organization Detail** [Edit](#) [Deactivate Org](#)

Organization Name	SKumar & Co	Phone	
Primary Contact	srikumar S	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
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Newsletter	<input checked="" type="checkbox"/>	Used Data Space	296 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>00Df4000003khEA</b>
		Organization Edition	Developer Edition
		Instance	NA59
		Modified By	srikumar S, 5/14/2018 5:12 PM

Created By srikumar S, 5/14/2018 5:03 PM

[Edit](#) [Deactivate Org](#)

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)

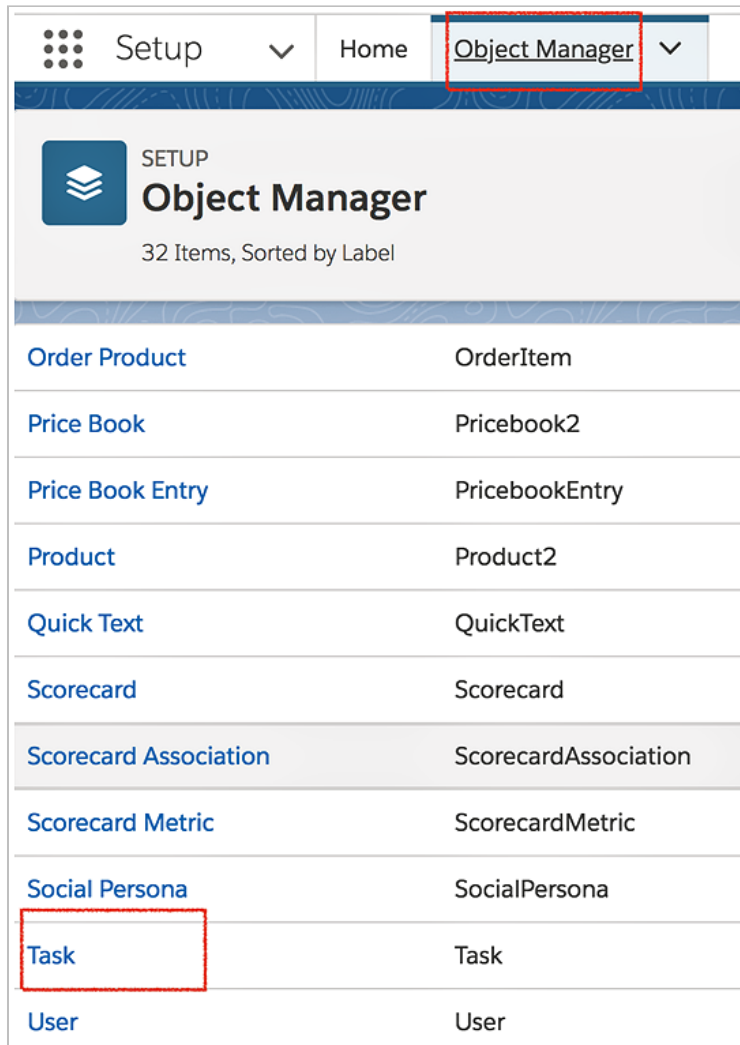
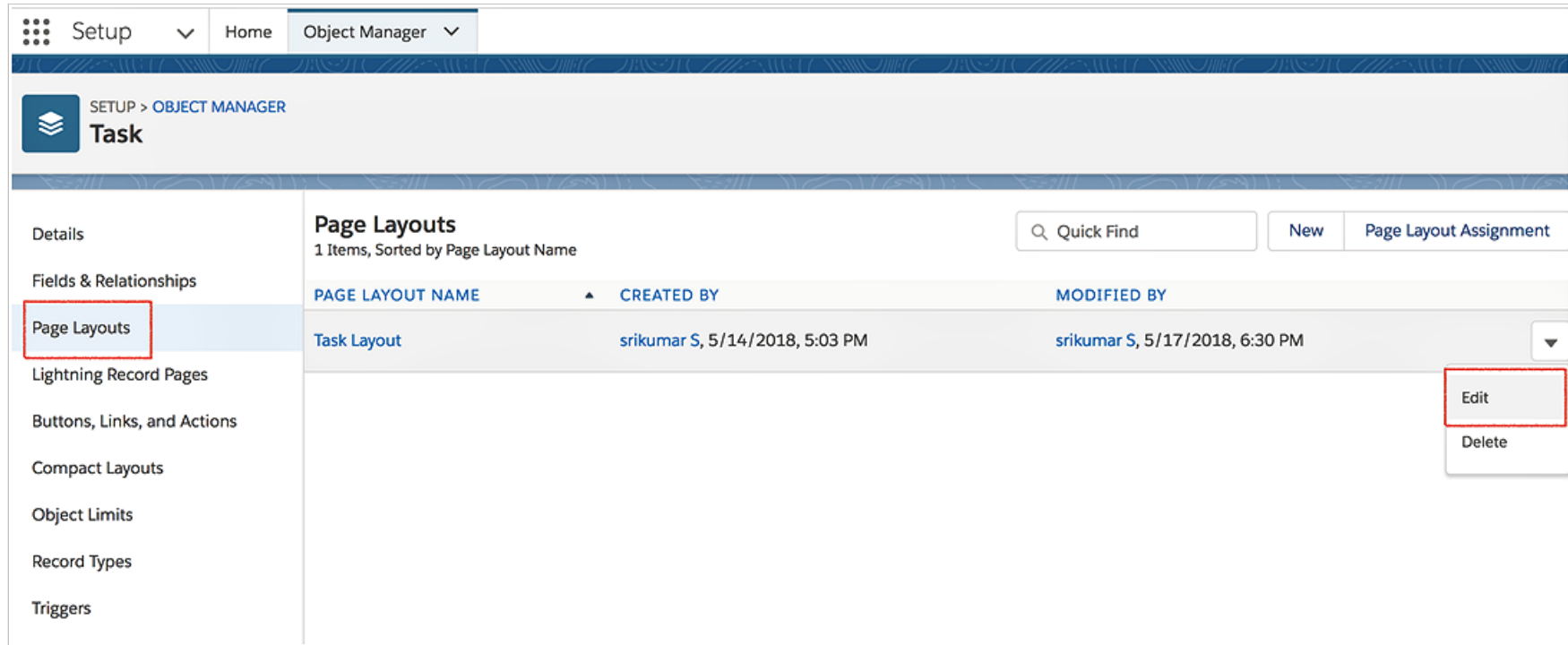


Figure 50



The screenshot shows the Salesforce Setup interface. At the top, there are tabs for Setup, Home, and Object Manager. Below the tabs, the breadcrumb path is 'SETUP > OBJECT MANAGER' followed by the 'Task' object. The left sidebar contains a list of setup options: Details, Fields & Relationships, Page Layouts (highlighted with a red box), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Object Limits, Record Types, and Triggers. The main content area is titled 'Page Layouts' and shows '1 Items, Sorted by Page Layout Name'. There is a 'Quick Find' search bar and buttons for 'New' and 'Page Layout Assignment'. A table lists the page layouts with columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The table contains one entry: 'Task Layout' created by 'srikumar S' on '5/14/2018, 5:03 PM' and modified by 'srikumar S' on '5/17/2018, 6:30 PM'. To the right of the table, there is a dropdown menu with 'Edit' (highlighted with a red box) and 'Delete' options.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Task Layout	srikumar S, 5/14/2018, 5:03 PM	srikumar S, 5/17/2018, 6:30 PM

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 Field Name \*

Section	Call Object Ident...	checkbox	Date__time	formula-date	Name	Priority	Repeat This Task	Subject
Blank Space	Call Recording	Comments	Due Date	Geolocation	Phone	Public	RequiredPick	Task Subtype
Assigned To	Call Result	Created By	Email	hello__a	phone	Recurrence Interval	requiredText	testField
Call Duration	Call Type	Date__1	formula-checkbox	Last Modified By	PickList_c	Related To	Status	Type

Task Sample

**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 Custom Buttons

Edit Delete Delete Series Create Follow-Up Task Create Follow-Up Event

Task Information (Header visible on edit only)

★ Assigned To	Sample User	★ Status	Sample Status
🔒 Call Object Identifier	Sample Call Object Identifier	★ Name	Sample Contact
★ Subject	Sample Subject	★ Related To	Sample Contract
★ Due Date	1/26/2016 11:56 PM	🔒 Email	sarah.sample@company.com
🔒 Phone	1-415-555-1212	🔒 Call Type	Sample Call Type
★ Priority	Sample Priority	🔒 Call Duration	58,659
★ hello__a	www.salesforce.com		

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)

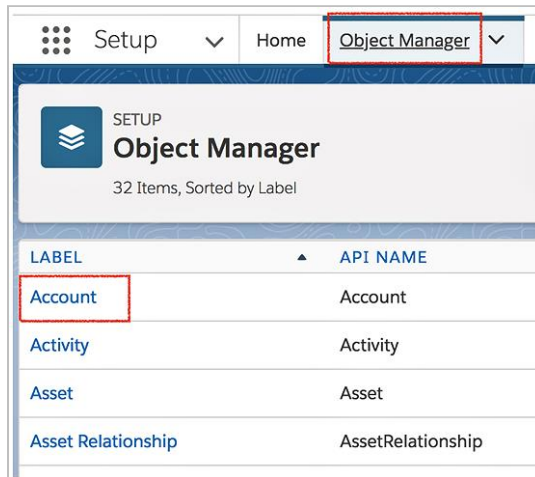


Figure 53

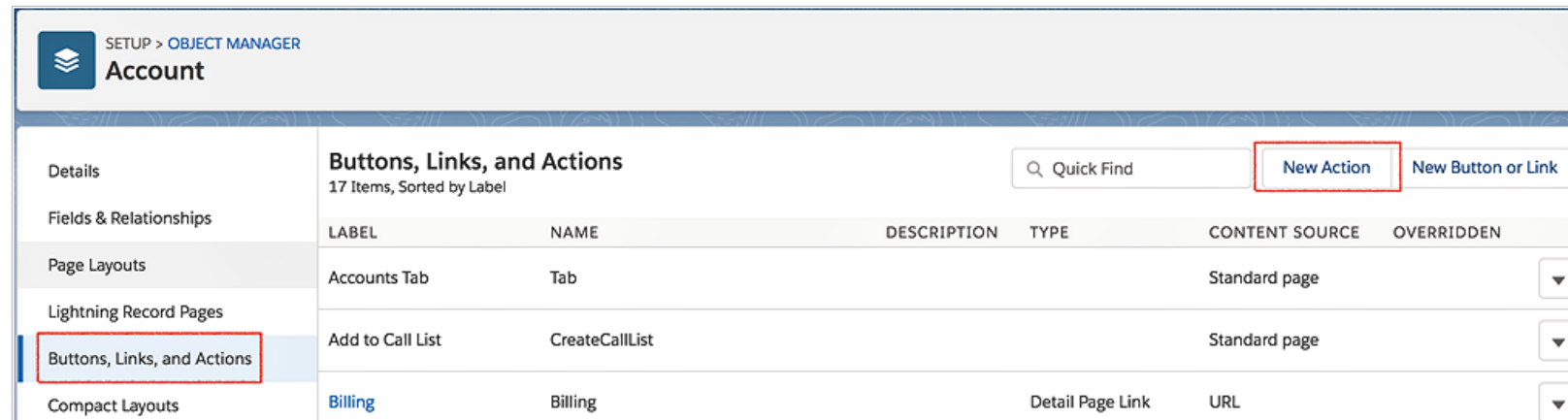
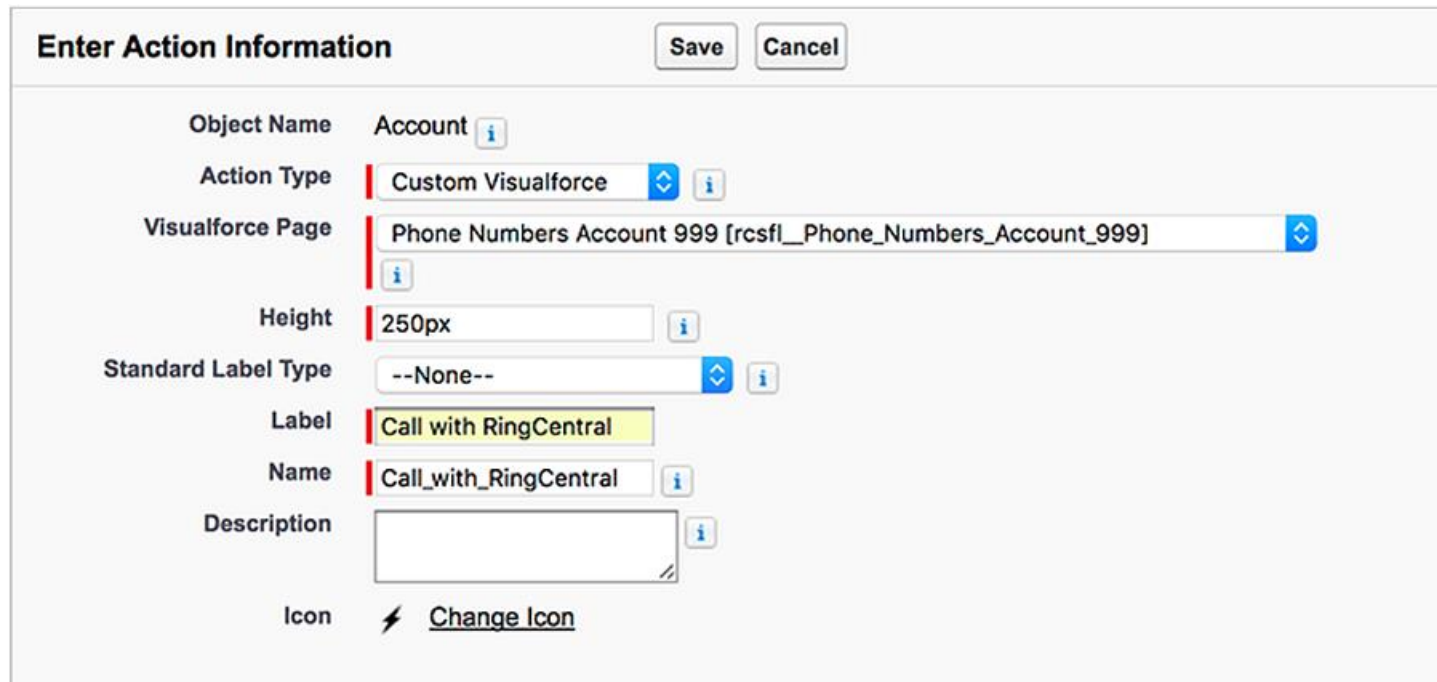


Figure 54

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)














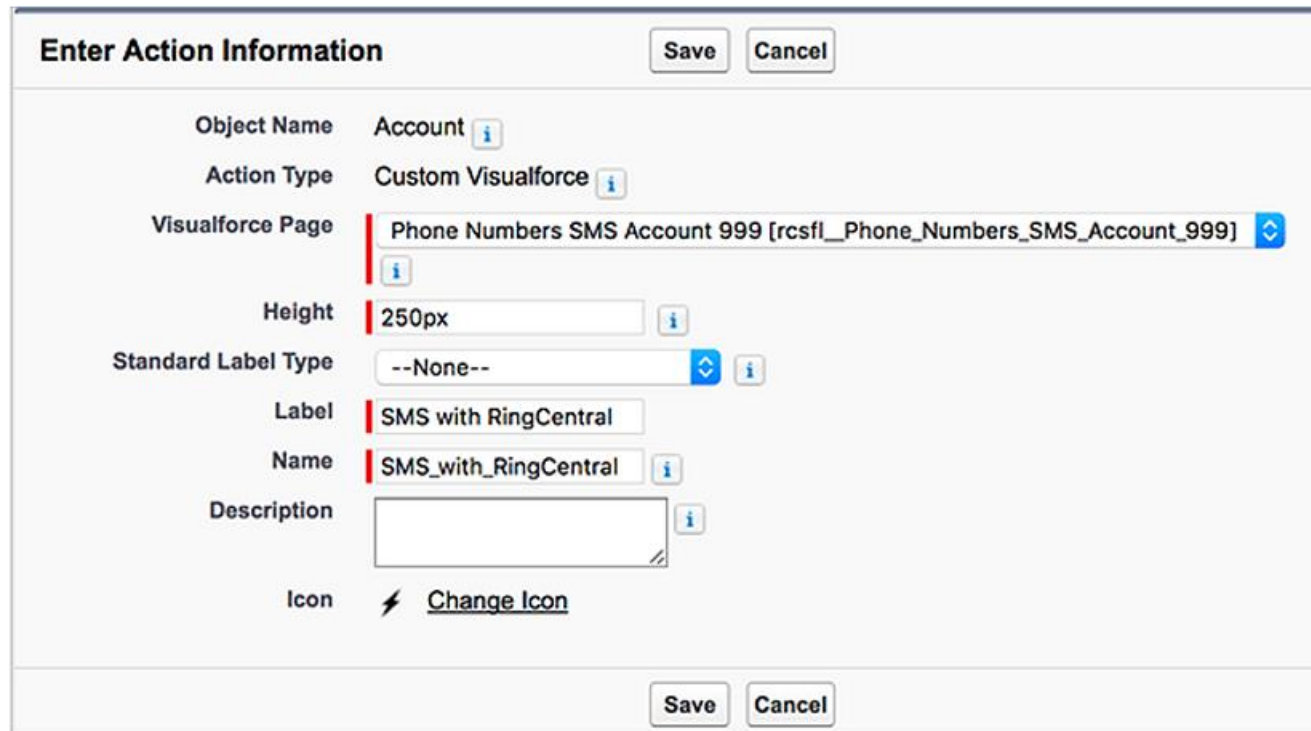
<b>Enter Action Information</b>		<b>Save</b>	<b>Cancel</b>
Object Name	Account 		
Action Type	Custom Visualforce  		
Visualforce Page	Phone Numbers Account 999 [rcsfl_Phone_Numbers_Account_999]  		
Height	250px 		
Standard Label Type	--None--  		
Label	Call with RingCentral		
Name	Call_with_RingCentral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

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)




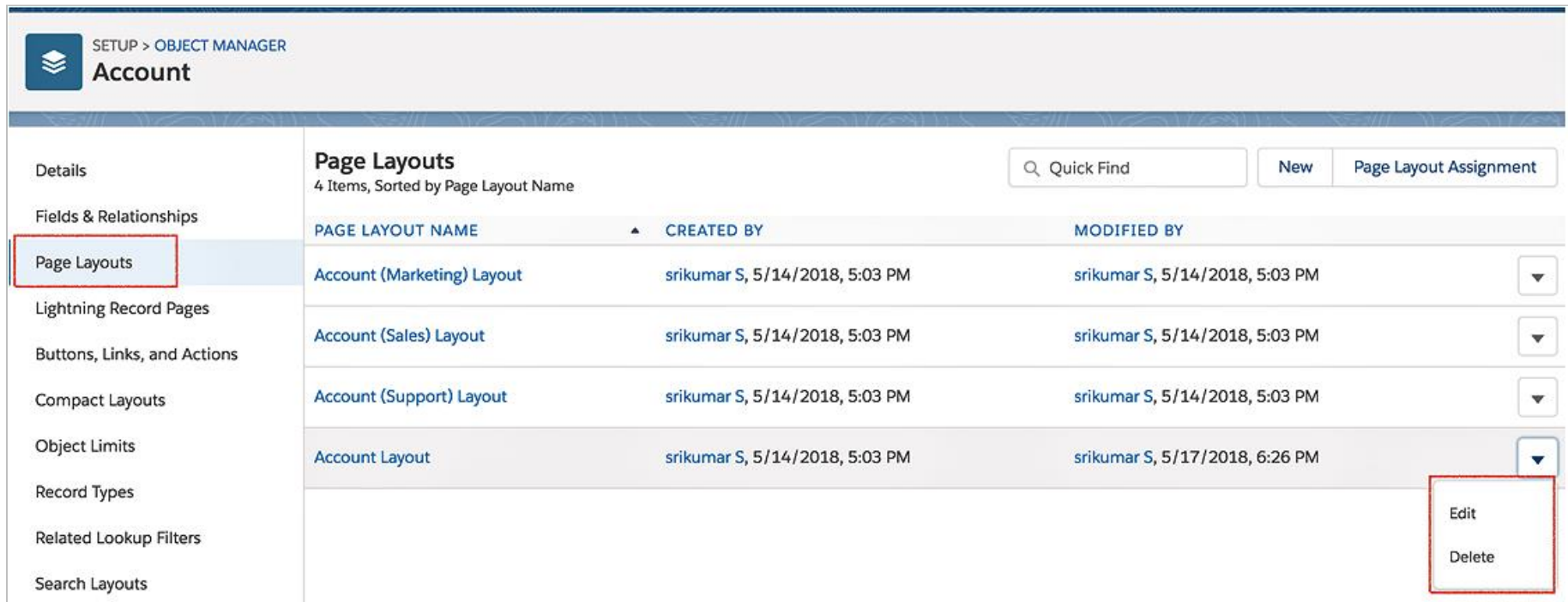
Enter Action Information		Save	Cancel
Object Name	Account		
Action Type	Custom Visualforce		
Visualforce Page	Phone Numbers SMS Account 999 [rcsfl_Phone_Numbers_SMS_Account_999]		
Height	250px		
Standard Label Type	--None--		
Label	SMS with RingCentral		
Name	SMS_with_RingCentral		
Description			
Icon	 <a href="#">Change Icon</a>		
		Save	Cancel

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.



SETUP > OBJECT MANAGER

### Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Object Limits

Record Types

Related Lookup Filters

Search Layouts

#### Page Layouts

4 Items, Sorted by Page Layout Name

Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Account (Marketing) Layout	srikumar S, 5/14/2018, 5:03 PM	srikumar S, 5/14/2018, 5:03 PM	▼
Account (Sales) Layout	srikumar S, 5/14/2018, 5:03 PM	srikumar S, 5/14/2018, 5:03 PM	▼
Account (Support) Layout	srikumar S, 5/14/2018, 5:03 PM	srikumar S, 5/14/2018, 5:03 PM	▼
Account Layout	srikumar S, 5/14/2018, 5:03 PM	srikumar S, 5/17/2018, 6:26 PM	▼

Edit

Delete

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)



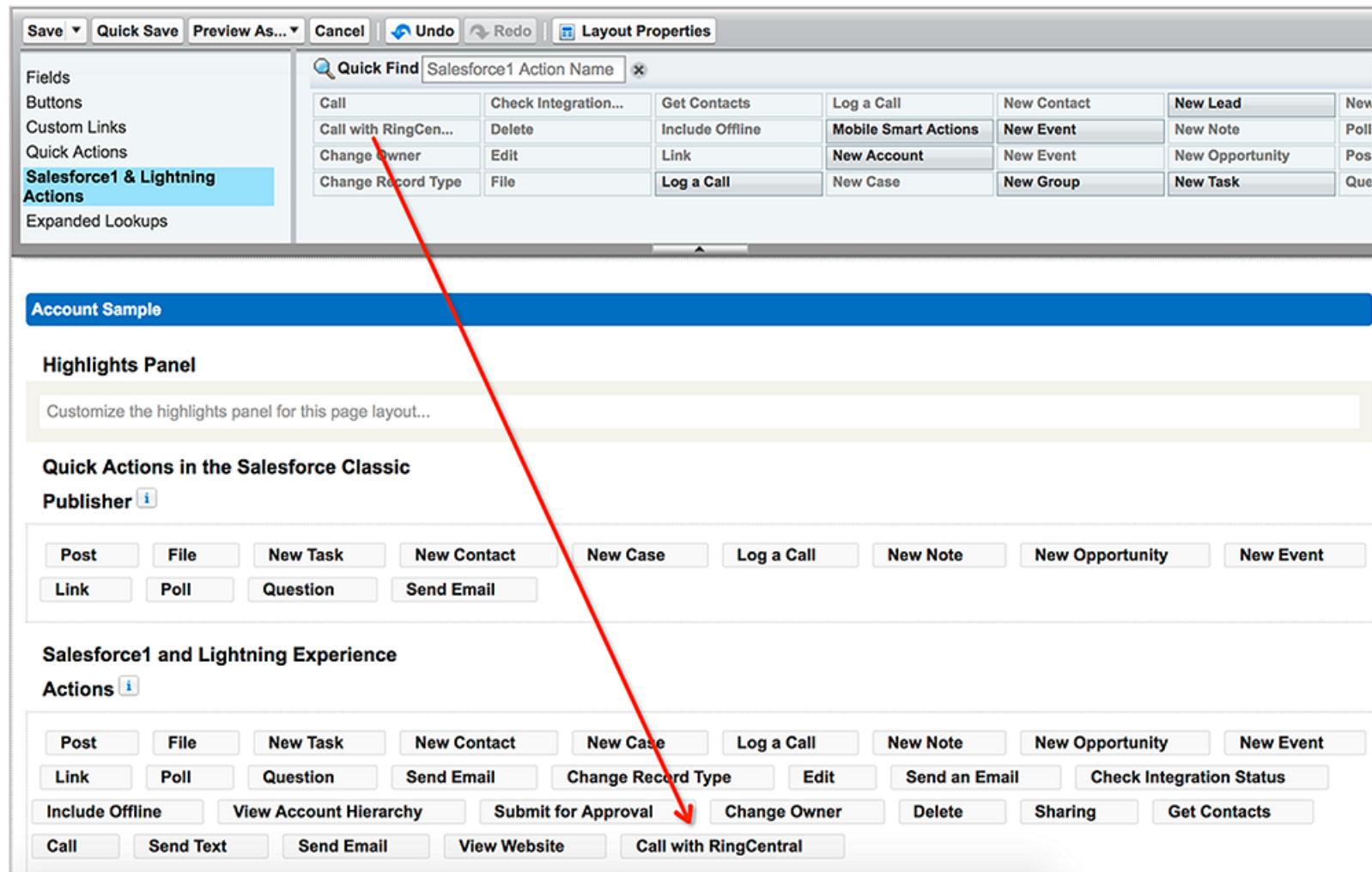


Figure 58



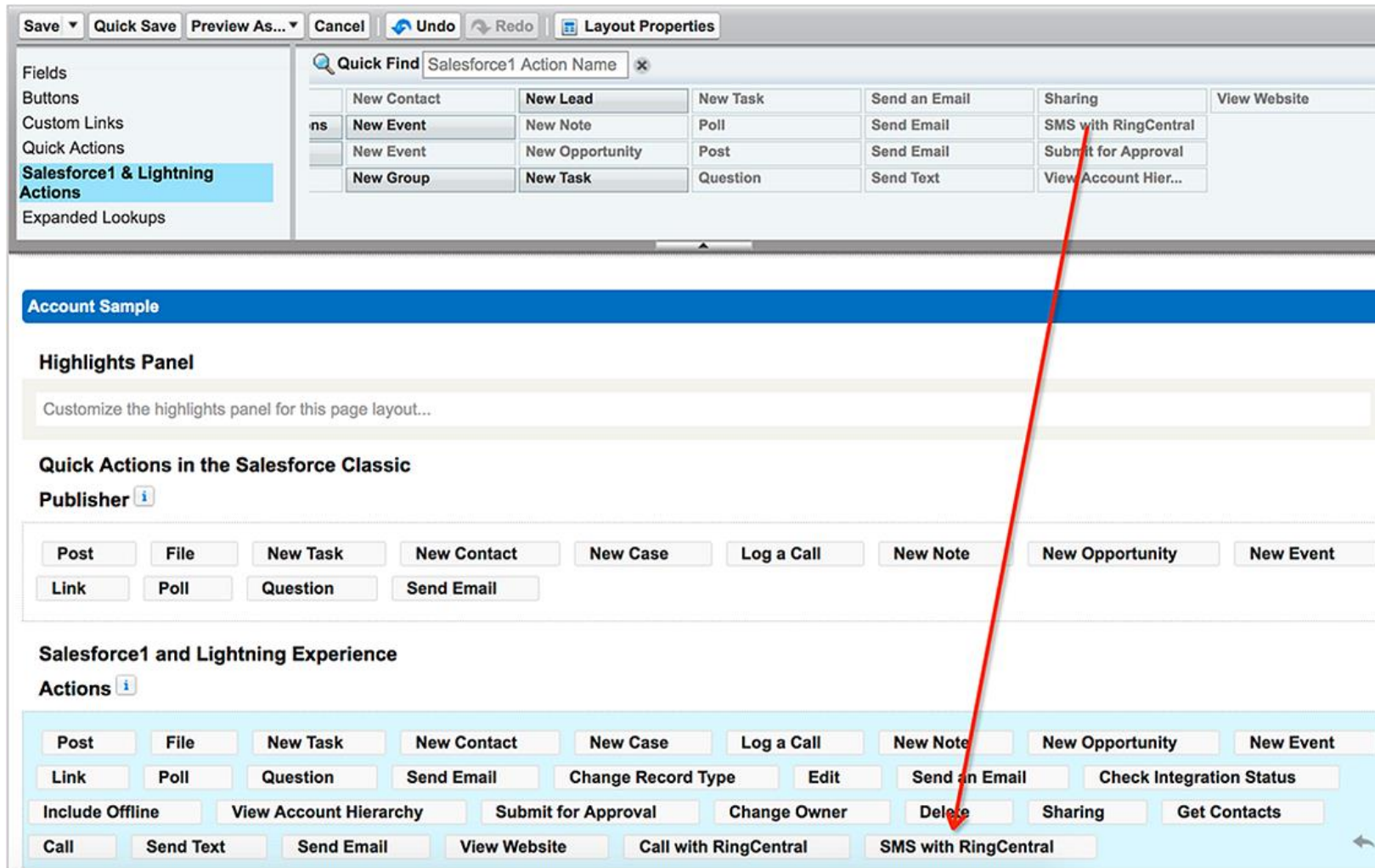


Figure 59

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)

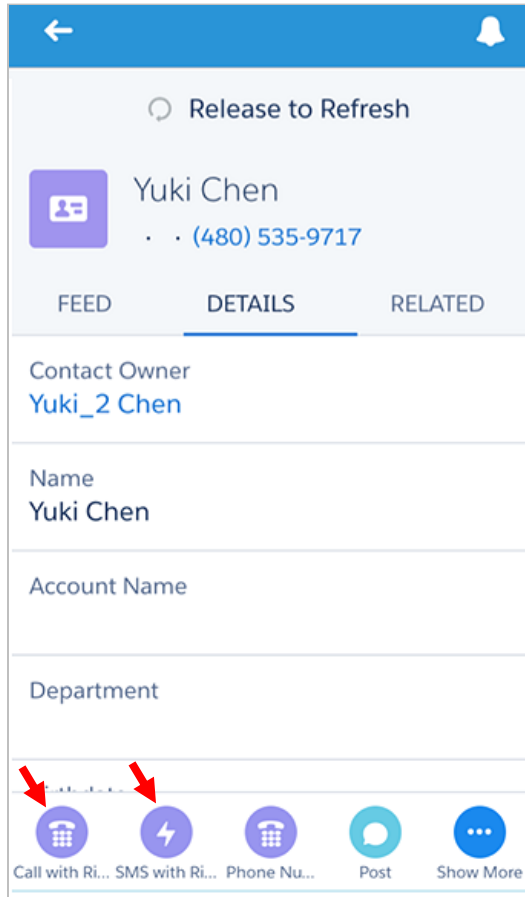


Figure 60

## 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.