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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

Log In to AppExchange

To continue, log in with your Salesforce credentials.

Log In

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

Listing: RingCentral for Salesforce

Don’t have a Salesforce account?

Continue as Guest

Figure 3

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

Figure 3
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.
Wait for the installation to complete.

Figure 5

Installing and granting access to all Users...

<table>
<thead>
<tr>
<th>App Name</th>
<th>Publisher</th>
<th>Version Name</th>
<th>Version Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>RingCentral for Salesforce</td>
<td>RingCentral, Inc.</td>
<td>5.10.2</td>
<td>5.11</td>
</tr>
</tbody>
</table>

Figure 6
Click “Done” when the installation is complete.

![Installation Complete!](image)

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)
### 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 evaluate the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page. To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

<table>
<thead>
<tr>
<th>Action</th>
<th>Package Name</th>
<th>Publisher</th>
<th>Version Number</th>
<th>Namespace Prefix</th>
<th>Status</th>
<th>Allowed Licenses</th>
<th>Used Licenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uninstall</td>
<td>rc_sf_package</td>
<td>RingCentral</td>
<td>5.11</td>
<td>rc_sf</td>
<td>Active</td>
<td>Unlimited</td>
<td>0</td>
</tr>
</tbody>
</table>

No uninstall package data archives

---

**Figure 8**
Step 2: Configure the Call Center

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

Close the tab and return to Setup Home > Call Centers and click "Continue".
Select the call center Cloud Phone App and click Edit.
Paste the URL from OpenCTI Index page to CTI Adapter URL; then click Save.
Note: The above is an example of a Salesforce Org where a custom URL redabac-us-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.)
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.

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.
Figure 17

---

### Call Center

**Cloud Phone App v2**

All Call Centers > Cloud Phone App v2

<table>
<thead>
<tr>
<th>Call Center Detail</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Internal Name</strong></td>
<td>LightningCallCenterExport</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Display Name</strong></td>
<td>Cloud Phone App v2</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>CTI Adapter URL</strong></td>
<td><a href="https://na55.visual.force.com/apex/OpenCTIIndex999">https://na55.visual.force.com/apex/OpenCTIIndex999</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Use CTI API</strong></td>
<td>true</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Softphone Height</strong></td>
<td>450</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Softphone Width</strong></td>
<td>300</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Salesforce Compatibility Mode</strong></td>
<td>Classic_and_Lightning</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Dialing Options

<table>
<thead>
<tr>
<th>Prefix Type</th>
<th>Prefix</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outside Prefix</td>
<td>9</td>
</tr>
<tr>
<td>Long Distance Prefix</td>
<td>1</td>
</tr>
<tr>
<td>International Prefix</td>
<td>01</td>
</tr>
</tbody>
</table>

#### Call Center Users

**Manage Call Center Users**

**Call Center Users by Profile**

<table>
<thead>
<tr>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
</tr>
</tbody>
</table>
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)

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)
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 profiles by clicking Layout Assignment in the Softphone Layouts page.

![Softphone Layout Edit](image)

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.

Click Save to save the Softphone layout
Softphone Layout Edit

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

**Name**: RingCentral Softphone

**Select Call Type**: Inbound

**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 single Lead found, display**: Name

---

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.

![Softphone Layouts](image)

**Softphone Layouts**

A softphone is a customizable call control tool that appears in the sidebar of every salesforce.com page if a user is assigned to a call center and can design custom softphone layouts and assign them to call center users based on their user profile.

<table>
<thead>
<tr>
<th>Action</th>
<th>Name</th>
<th>Default</th>
<th>Created By Alias</th>
<th>Created Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>RingCentral SoftPhone Layout</td>
<td>✔️</td>
<td>✔️</td>
<td>5/14/2018 5:32 PM</td>
</tr>
</tbody>
</table>

![Figure 26](image)

Assign the Softphone Layout to the relevant profiles.

![Softphone Layout Assignment](image)

**Softphone Layout Assignment**

Assign a softphone layout to each profile in the list below. Only profiles that include call center

![Figure 27](image)

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.

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

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**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.

Figure 34
Select the Lightning app you wish to add the RingCentral app, and click Edit.

![Lightning Experience App Manager](image)

Figure 35
Open the **Utility Bar** tab and click **Add**.

![RingCentral Lightning App Builder Utility Bar](image)

**Utility Bar**

Give your users quick access to common productivity tools.

**Utility Bar Items**

- **Phone**
  - **Open CTI Softphone**
  - **Utility Item Properties**
    - **Label**
      - *Phone*
    - **Icon**
      - 📞
    - **Panel Width**
      - 360
    - **Panel Height**
      - 480
    - **Load in background when app opens**

*Figure 36*
Select **Open CTI Softphone** from the available list and click it.

![Diagram of utility bar with Open CTI option selected](image-url)

**Figure 37**
Click **Save** then click **Done**.

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

![Utility Bar](image)

**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)

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)
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.

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

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)

In new modal window, select the Users or Roles you want to share the reports with; then click Done and Close. (Figure 47)
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.

![Cloud Phone Settings](image)

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. (Figure 49)

### 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)
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)

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Associated Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Product</td>
<td>OrderItem</td>
</tr>
<tr>
<td>Price Book</td>
<td>Pricebook2</td>
</tr>
<tr>
<td>Price Book Entry</td>
<td>PricebookEntry</td>
</tr>
<tr>
<td>Product</td>
<td>Product2</td>
</tr>
<tr>
<td>Quick Text</td>
<td>QuickText</td>
</tr>
<tr>
<td>Scorecard</td>
<td>Scorecard</td>
</tr>
<tr>
<td>Scorecard Association</td>
<td>ScorecardAssociation</td>
</tr>
<tr>
<td>Scorecard Metric</td>
<td>ScorecardMetric</td>
</tr>
<tr>
<td>Social Persona</td>
<td>SocialPersona</td>
</tr>
<tr>
<td>Task</td>
<td>Task</td>
</tr>
<tr>
<td>User</td>
<td>User</td>
</tr>
</tbody>
</table>

Figure 50
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.
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)
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)
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.

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
### 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)
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.