

# RingCentral for Salesforce

## User 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.

It offers these features:

- Available in both Classic and Lightning view of Salesforce.com
- Easy click-to-dial by clicking on any phone number in Salesforce
- Instant screen pop displaying the caller's information as soon as a call arrives
- Automatic call dispositions for quick call logging
- SMS capabilities make texting easy and reliable
- Accurate call logs and SMS logs saved to the corresponding record
- New records—Accounts, Contacts, Leads can be easily created while on call or having SMS conversations

### About this Guide

This guide is specifically designed for end users of RingCentral for Salesforce. This guide is not intended for system/network administrators and does not provide any information on how to set up the application on user desktops or how to configure the Salesforce.com instance to be able to use this application. This user guide will show you how to use this application, and provide known issues/limitations of the application as well as some basic troubleshooting questions and answers.

**Note:** RingCentral for Salesforce version 3.40 and later includes Salesforce1. This enables you to make calls via the Salesforce1 app with RingCentral's quality phone services.

If your Salesforce is already configured for Salesforce1 (mobile access) then no additional steps are required.

## Basics

For optimal user experience, ensure that:

1. The browser you are using is updated to the latest version.
2. You have set the correct number as your RingCentral Direct Number—you will be making and receiving calls from this number through the Salesforce.com interface. You can find your RingCentral Direct Number in the RingCentral Service web at **My Settings > Phones and Numbers > Direct Numbers**.
3. Login to Salesforce.com through the browser; the App will work only while the user is logged in to Salesforce.com.
4. Login to RingCentral for Salesforce through Salesforce.com. Use your RingCentral Direct Number for the user name and your RingCentral password.
5. Your browser has its pop-up blocker disabled for the Salesforce.com site.

## 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.
2. **Region:** Select the country you are physically located in. This country code will be used for local dialing. If you select US/CA as your country, you will need to further specify an area code before you could dial a 7-digit local phone number. (Figure 2, next page)
3. **Auto-create Call Logs:** When this option is selected, RingCentral will automatically create a call log in the Activity History for any inbound or outbound call. If this option is not selected, a call log will be created only if you press the **Save** button in the logging area during or after the call. (Figure 3)
4. **Auto-create SMS Logs:** When this option is selected, RingCentral will automatically create a call log in the Activity History for SMS conversations. The SMS exchanged with the same contact/lead/opportunity within the same day will be saved within one log. If this option is not selected, an SMS log will be created only if you press **Save** when viewing the SMS conversation.
5. Click **Save** to save your settings. These settings are cleared when the user logs out of RingCentral for Salesforce, but will persist if the user logs out from the Salesforce instance without logging out from the application.

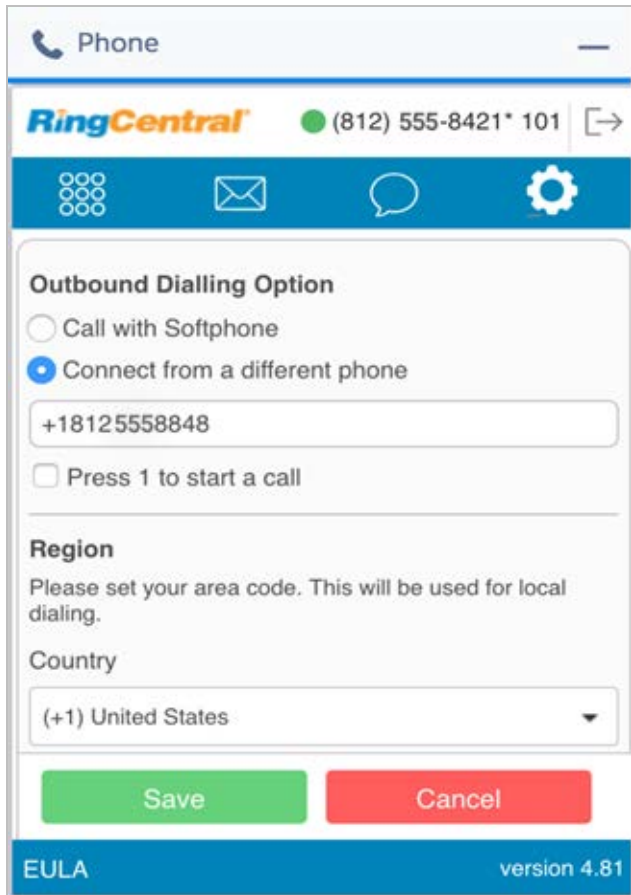


Figure 1—Settings (Lightning)

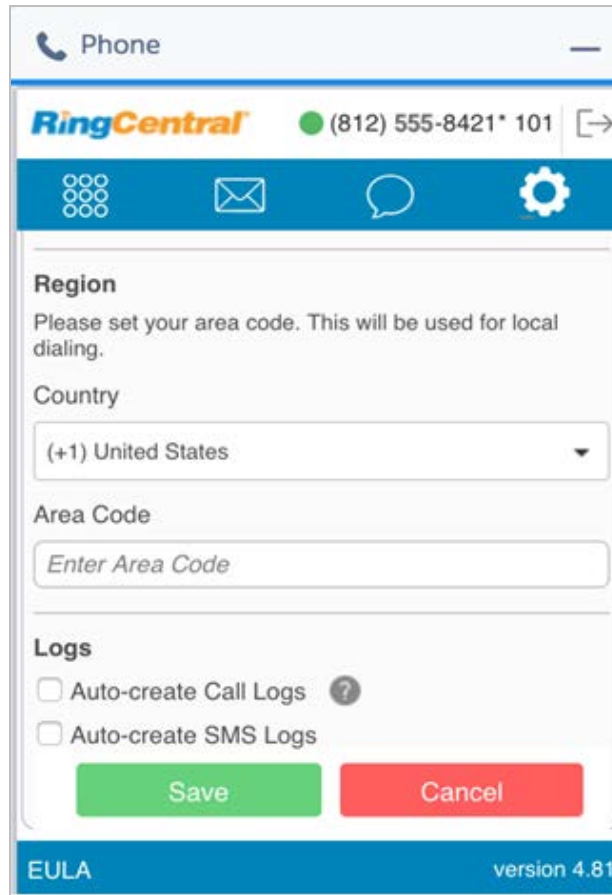


Figure 2—Settings2 (Lightning)

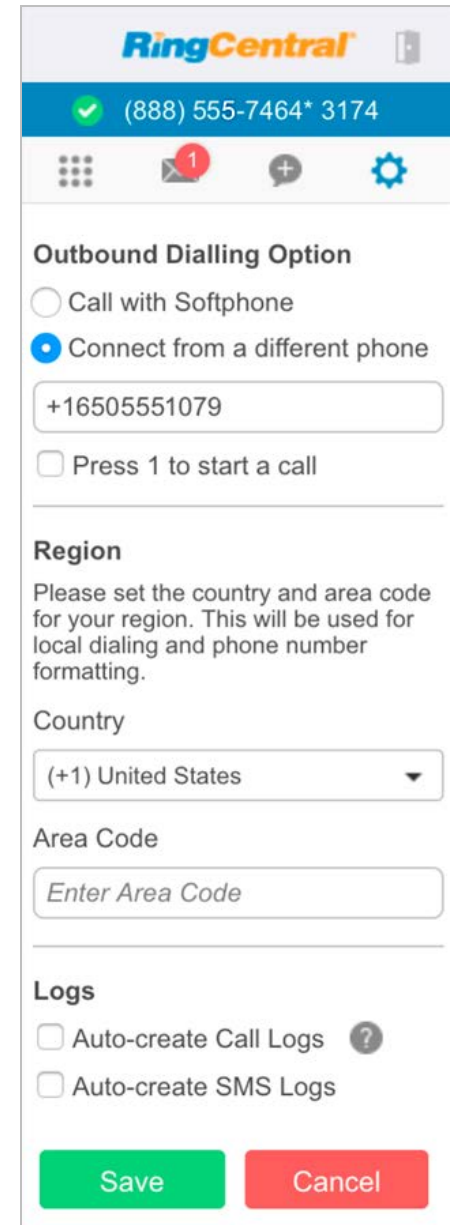


Figure 3—Settings (Classic)

## Login

Open your browser and login to your Salesforce account. If you haven't logged in RingCentral for Salesforce app, you'll see the **Sign In** button. Click the button to go to the login page. Type in your RingCentral Direct Number or your main company number with Ext, and your RingCentral account password. (Figure 4, 5, 6)



Figure 4—Welcome Page (Lightning)

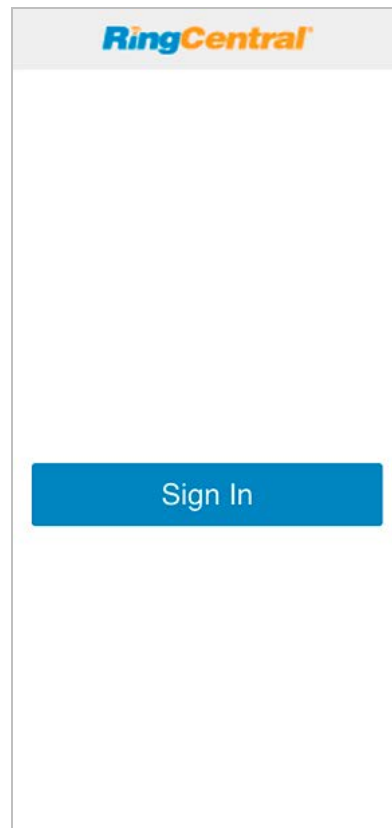


Figure 5—Welcome Page (Classic)

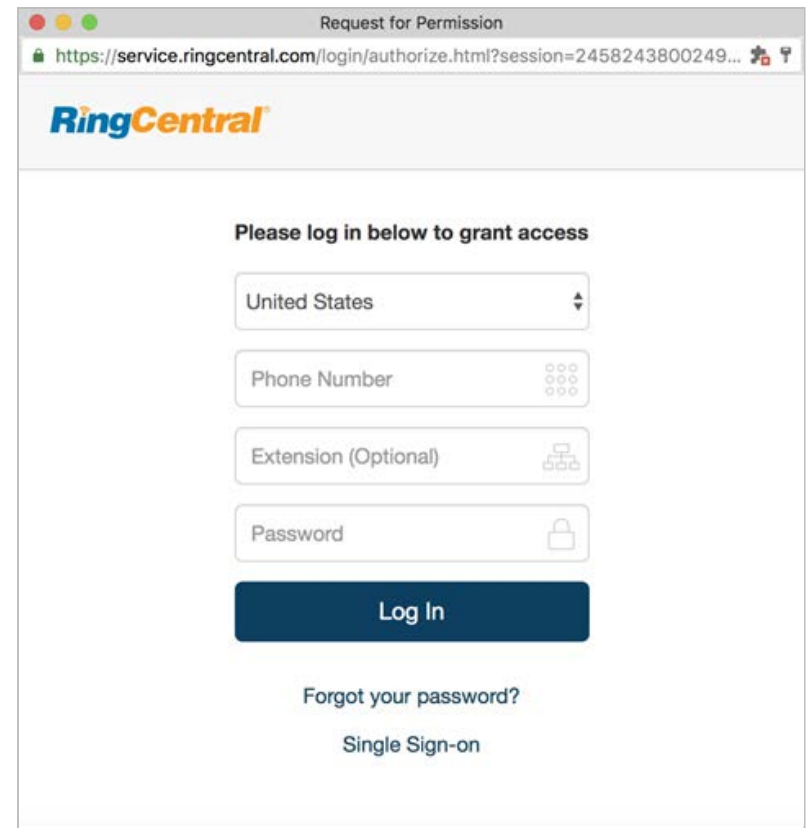


Figure 6—Login Popup

Once the login is successful, the app layout will change to as shown in Figures 7 and 8 below.

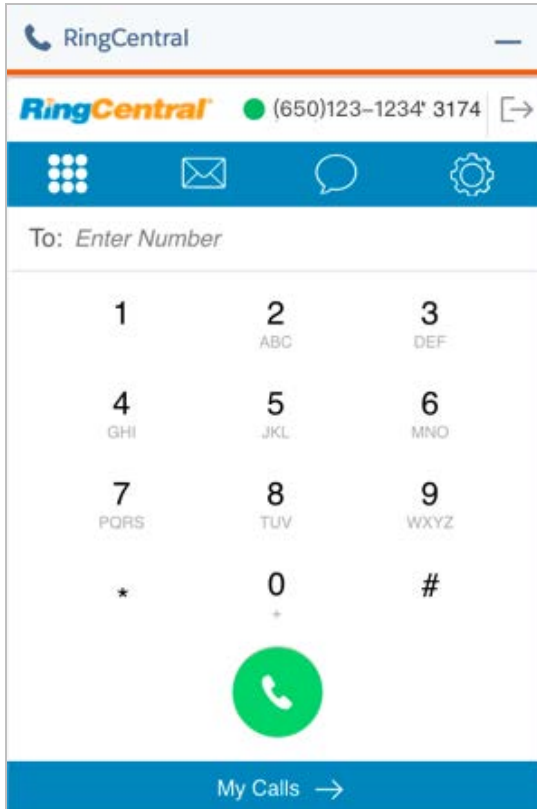


Figure 7—Lightning



Figure 8—Classic

## Placing Calls

There are two ways you can make an outgoing call:

1. Type in the number you want to dial in the dial pad (Figure 9)
2. Use the click-to-dial feature (Figure 10)

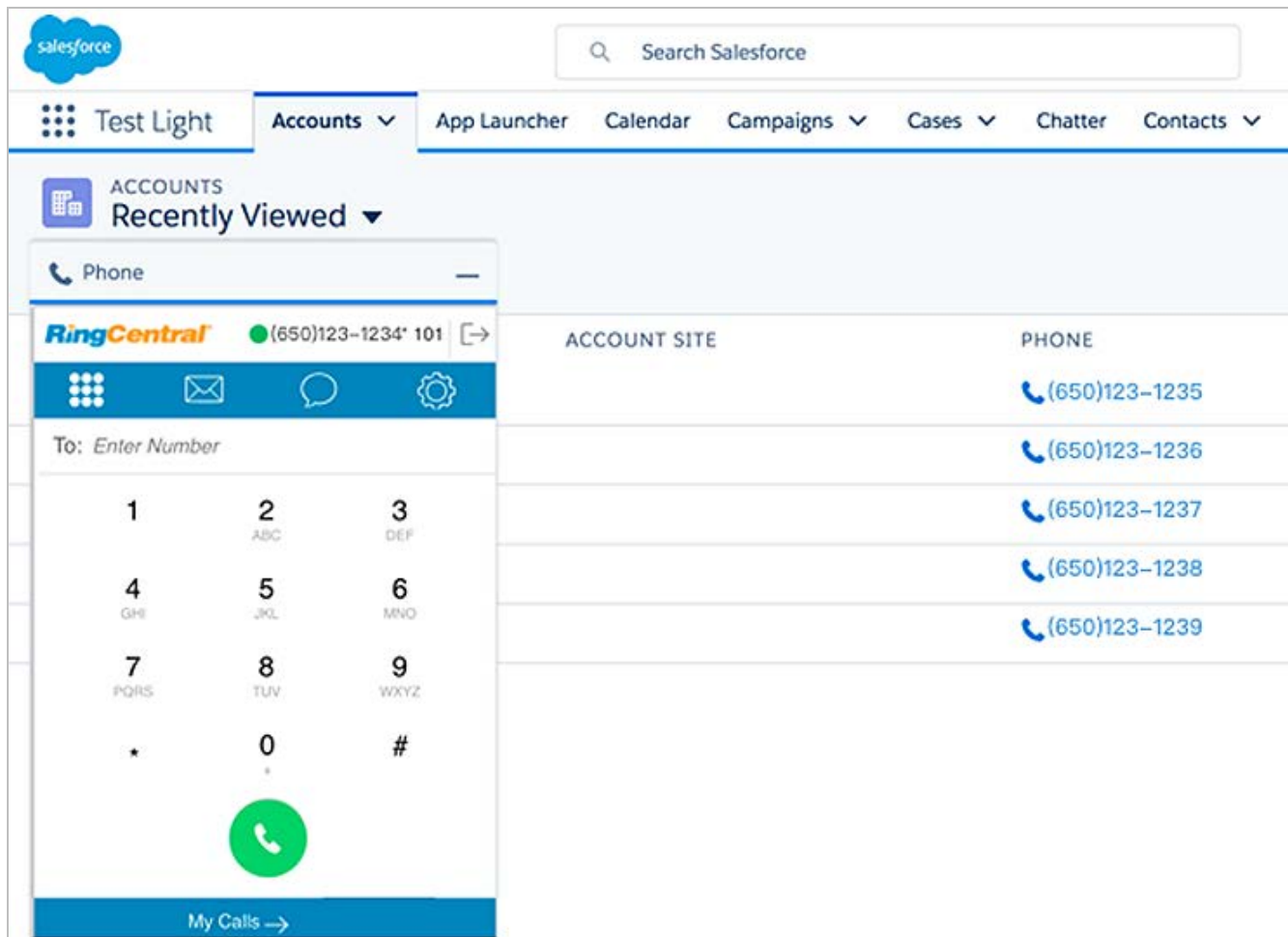


Figure 9—Lightning



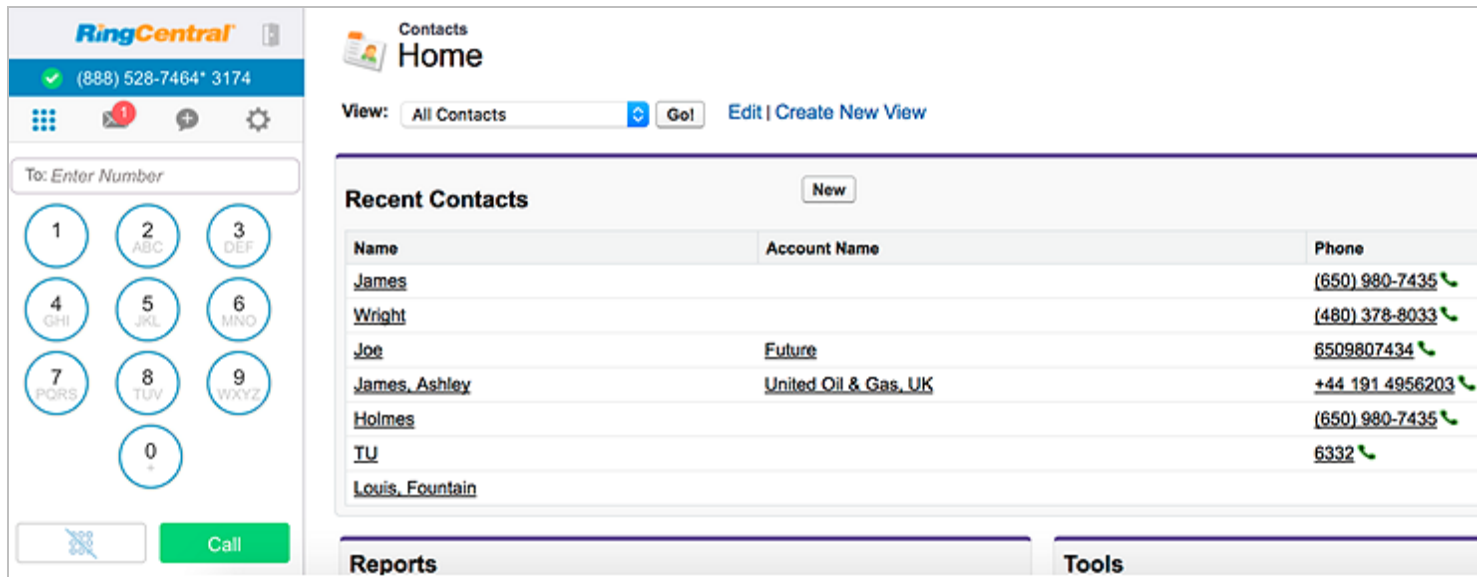


Figure 10—Classic

If you choose to **Call with Softphone**, your RingCentral for Desktop will be initiated to place the call. If you select to **Connect from a different phone**, RingCentral will first call you at your specified number and the app dialer will change to the screen shown below during the time the call is being connected.

Once you answer the call, depending on your settings, you may be prompted to press **1** before the call is connected to the other party. If the call cannot be completed, the **Call could not be completed** message will be displayed.

Once you have picked up the call and it starts ringing the other party, the screen will get updated to following display. If the call is connected successfully, the RingCentral for Salesforce display will start showing a call timer and an area in which to take call notes. (Figure 11 and 12, below)

If you have set RingCentral for Salesforce to auto-create call logs, a call log will automatically be saved to Salesforce.com, and it will be updated whenever you type notes or change the related objects. If you have not set it to auto-create call logs then the log will be created or updated only when you press the **Save Log** button.

You are free to hang up the phone through which you are speaking to the called party with, and continue to edit the Comments and the Subject for the call log entry. Once the call has ended the timer will stop and the call log will move to the Last Call area where you can continue editing it.

For call actions such as transfer, holds, and mute, use the controls available on the device on which you answered the call.

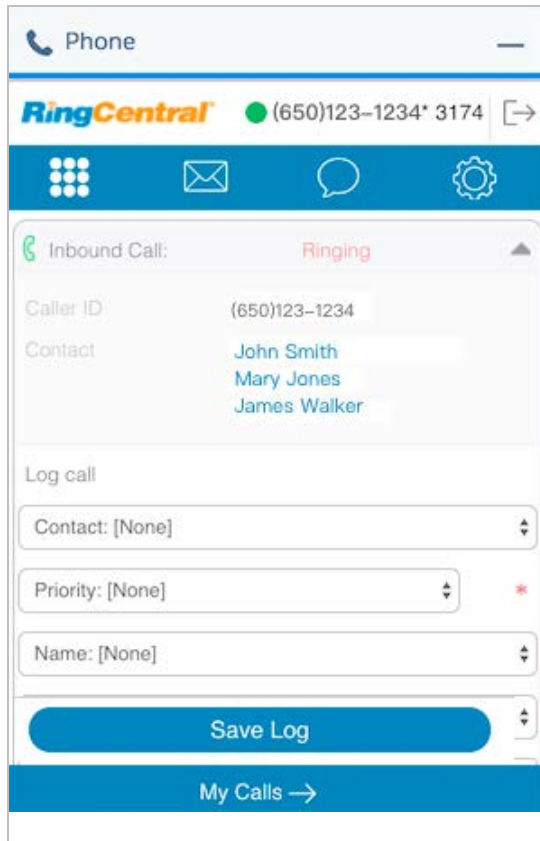


Figure 11—Lightning

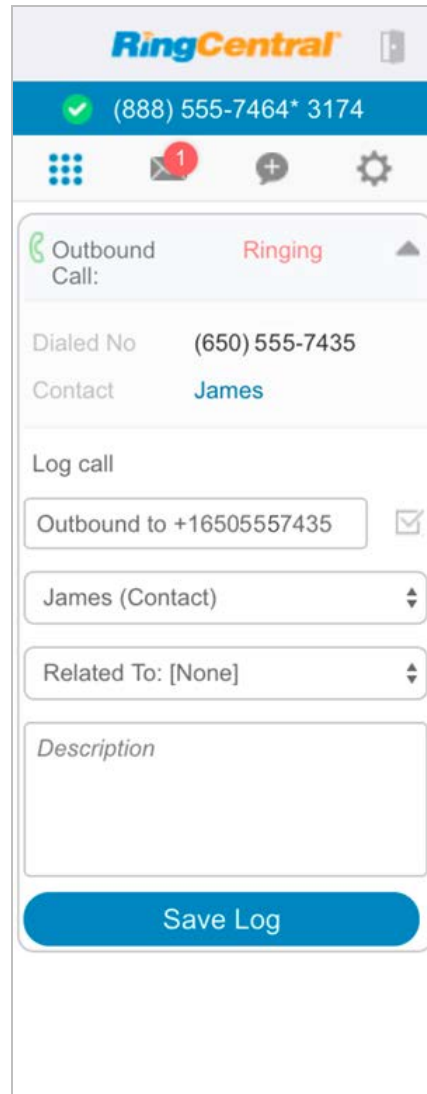


Figure 12—Classic

### Placing an International Call vs. a Local Call

In the event that you wish to place an international call (i.e. to a destination outside of your home country), you must ensure that the number is properly formatted.

If you wish to click-to-dial an international number, first ensure that the country code is part of the phone number, like this [📞 +33 34267 28523](#)

Please check the locale set in your Salesforce user profile, and save local phone numbers with your records in the format without the +country code. For example, if your locale is US in Salesforce, please don't save US phone numbers with +1. The RingCentral for Salesforce app will append country code following your locale when you click to dial a local phone number; for inbound calls the app will remove the country code before searching the matching records in Salesforce for your call.

You can set your region in the app, and when you enter a local number on the dialer in the app, the app will append the country code to the local number you dialed, following your region setting in the app.

## Incoming Calls

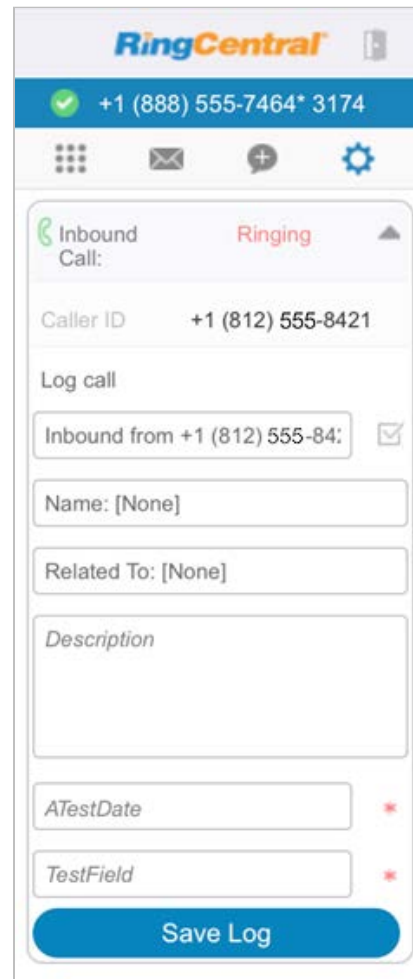
When an incoming call is received, you are notified about the incoming call on your RingCentral for Salesforce (Figure 13).

In addition to the app notification, other phones will ring, depending on the configuration of your RingCentral phone system.

Once you pick up the call on your device/desk phone, the call timer will start and the layout will change to give you the option to log the call. If the call goes directly to voicemail without ringing any of your RingCentral phones, then there will not be any notification to your RingCentral for Salesforce.

You have the choice of logging incoming calls, independent of the actions you take on your phone (e.g., accept the call, reject the call, put the caller on hold; hang up the call). Such actions you take will not impact the call logging experience in Salesforce.

To save the log as related activity, select the appropriate Salesforce entity and after fulfilling the required call log information, click the **Save Log** button.



The screenshot shows the RingCentral app interface. At the top, there is a status bar with the RingCentral logo and a signal strength indicator. Below that, a blue header bar displays a green checkmark, a phone icon, and the number +1 (888) 555-7464\* 3174. A navigation bar contains icons for a grid, mail, a plus sign, and a gear. The main content area is titled "Inbound Call: Ringing" and shows the caller ID "+1 (812) 555-8421". Below this is a "Log call" section with a text input field containing "Inbound from +1 (812) 555-84:" and a checkmark icon. There are two dropdown menus: "Name: [None]" and "Related To: [None]". A "Description" field is also present. At the bottom, there are two input fields labeled "ATestDate" and "TestField", each with a red asterisk indicating a required field. A large blue "Save Log" button is at the very bottom.

Figure 13

## Related Search

Whenever there is an incoming call, the application searches Salesforce for matching records. Depending on the settings of your SoftPhone Layout in Salesforce.com, you will see the results in either the same window or a new window. If there is only one matching record, the detail page of that record will be displayed. If there are multiple records, usually you should see the search page listing all of the matching records. These settings can be changed or updated only by your Salesforce Administrator.

You can also find the matching record(s) in the **Related To/Name** dropdown in the app window.

If your administrator checks the **Auto-select call object** in the **Related To/Name** dropdown on the AdminUI, when there is only a single matching record found for your call, the app will auto-select it in **Related To/Name**; if you navigate away to view some other record details in Salesforce, the record you view will become the new auto-selected record in **Related To/Name**. You can manually select a record in **Related To/Name**, and the app will not override your selection when you navigate to another record details page.

## Call Recording

If you record your call and logged that call in Salesforce.com, you can find the call recording in the **Task Detail** page within a field **Call Recording**.

Click the link and you will be prompted to login with your RingCentral credentials. (Figure 14)



Figure 14

You can select to play or download the call recording. (Figure 15)

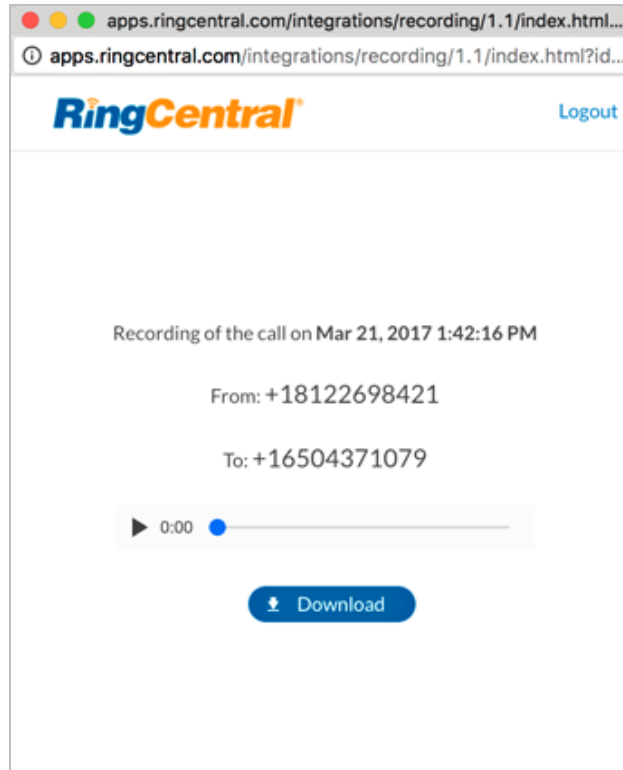


Figure 15

Note that you can access only the call recordings that you record. Only the system administrator of your RingCentral account can access all the call recordings in the organization.

## Compose Text

Click **Compose Text** icon in the navigation bar. Select which of your numbers you wish to send the text to. Enter the **To** phone number and compose the text message. Then click **Send** button. The sent message will be displayed in the conversation area. (Figure 16, 17)

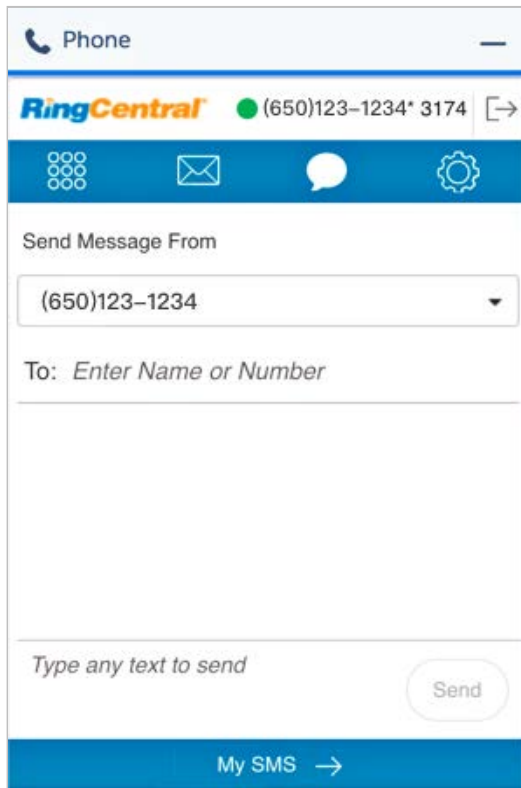


Figure 16—Lightning

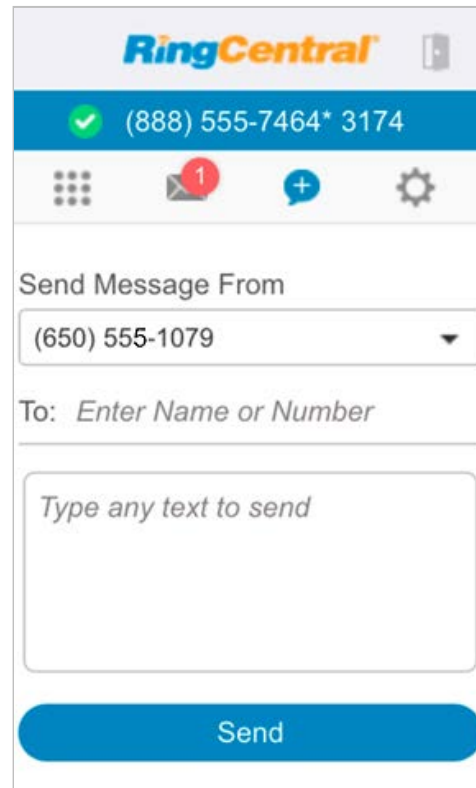


Figure 17—Classic

## Messages

Message history of past 7 days can be found in the **Messages** tab. Click a message to view the conversation details; click the button to view the contact details. (Figures 18, 19, 20)

If it's an unknown number, you could create a Salesforce object for it, or link it to any existing account/contact/lead/opportunity.

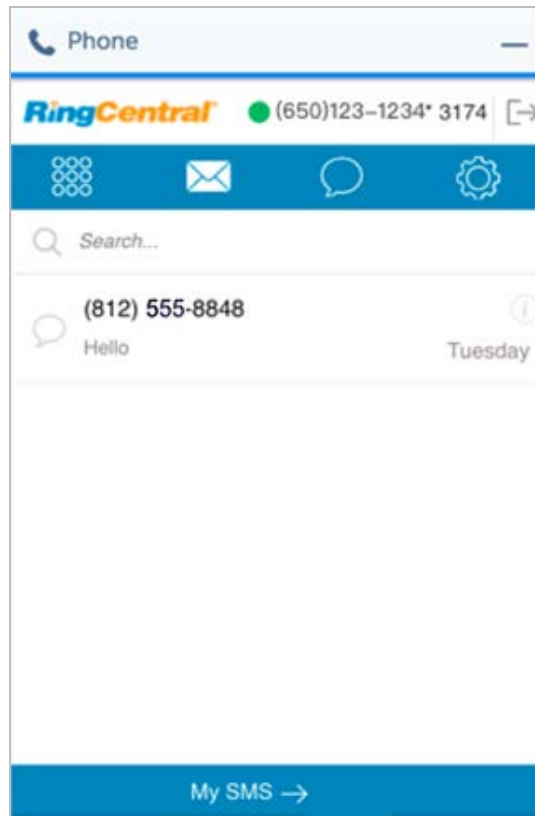


Figure 18—Lightning

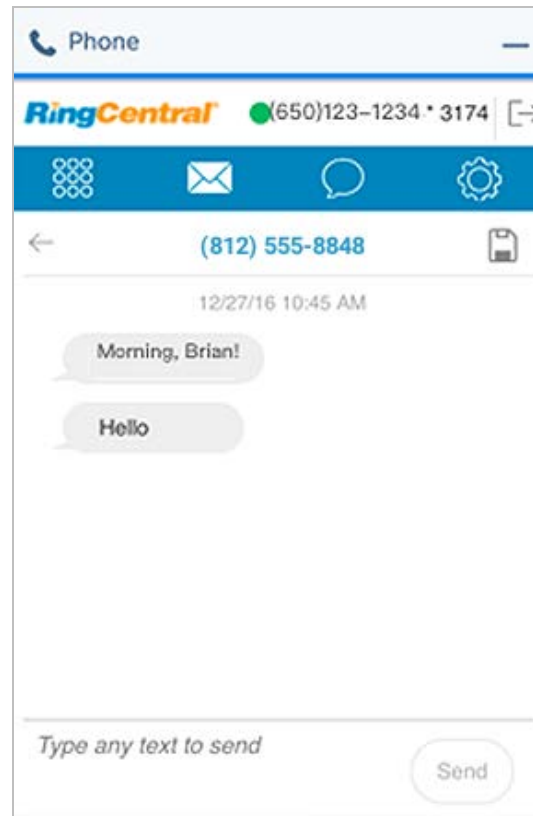


Figure 19—Lightning

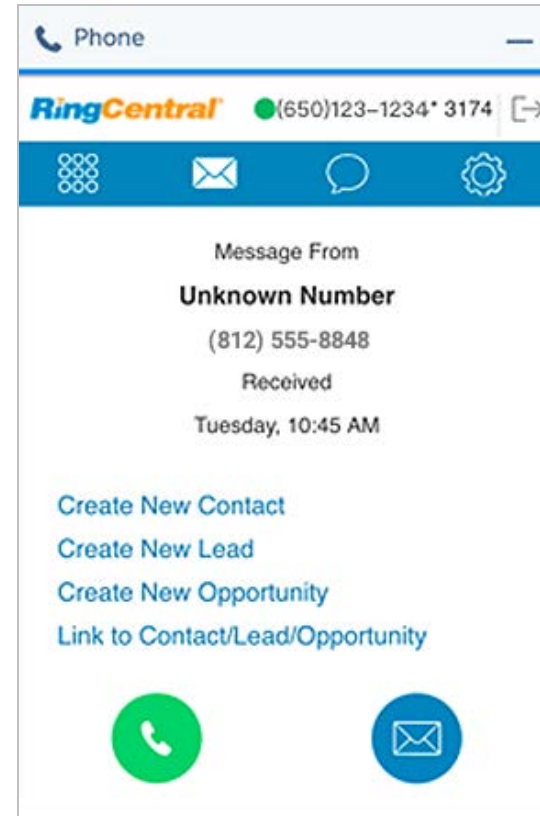


Figure 20—Lightning

To save messages as related activities, if you have **Auto-create SMS Log** turned on, the messages will be logged the moment it's successfully sent/received. Once you log in the RingCentral for Salesforce app, all the history messages will be logged as well. In case you have the **Auto-create SMS Log** turned off, if you wish to create log for a message conversation, go the message conversation details page and click the save icon.

## Activity Report

As you log calls and messages, you will see a link **My Calls** at the bottom of the **Dialer** tab, and a link **My SMS** at the bottom of the **Compose Text** and **Messages** tabs. Clicking the links will take you to the Lightning **REPORT** page. (Figure 21, 22)

| ASSIGNED        | SUBJECT   | DATE ↑   | CALL OBJECT IDENTIFIER                                   | PRIORITY | STATUS    | COMPANY / ACCOUNT | CONTACT        |
|-----------------|---|----------|--|----------|-----------|-------------------|----------------|
| GridD Lightning | 2017/02/03<br>09:46:35 SMS<br>between<br>+12092668176<br>to<br>+16504371079 | 2/3/2017 | 5295809515417483680-<br>1486051200000-0034100000NsSQ4AAN | Normal   | Completed | -                 | Joe T          |
| GridD Lightning | 2017/02/03<br>09:44:53 SMS<br>between<br>+12098376695<br>to<br>+16504371079 | 2/3/2017 | 5831467018485825672-<br>1486051200000-0034100000NsQbfAAF | Normal   | Completed | -                 | Lawrance Stone |

Filters →

- Role Hierarchy  
All Tasks and Events
- Show Me  
All activities
- Date  
All time
- RC Logging Type equals sms ×
- Date greater or equal YESTERDAY ×

Figure 21—Lightning

Developing Cloud Phone App for Salesforce, latest version

rose gan Help Sales

Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Orders Cases Solutions Products Reports Dashboards +

### My Calls Today Help for this Page

Report Generation Status: The report returned no results.

Report Options:

Summarize information by: --None-- Show My activities Show Completed Activities Show Tasks and Events

Time Frame  
Date Field: Date Range: Custom  
From: To:

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: Edit  
Date equals 3/20/2017 Clear  
AND RC Logging Type equals call Clear

| Call Object Identifier   | Activity Type | Case | Opportunity | Contact | Lead | Company / Account | Call Duration (minutes) | Call Result | Call Type | Assigned | Subject | Created Date |
|--------------------------|---------------|------|-------------|---------|------|-------------------|-------------------------|-------------|-----------|----------|---------|--------------|
| Grand Totals (0 records) |               |      |             |         |      |                   |                         |             |           |          |         |              |

Figure 22—Lightning



## Call and SMS with RingCentral from Salesforce1

Please make sure you have installed the RingCentral mobile app to use these functions.

Log in to Salesforce1. Go to check the details of an account, a contact or a lead with phone numbers(s). On the bottom menu you can find the **Call with RingCentral** and **SMS with RingCentral** options. (Figure 23, 24, 25)



Figure 23

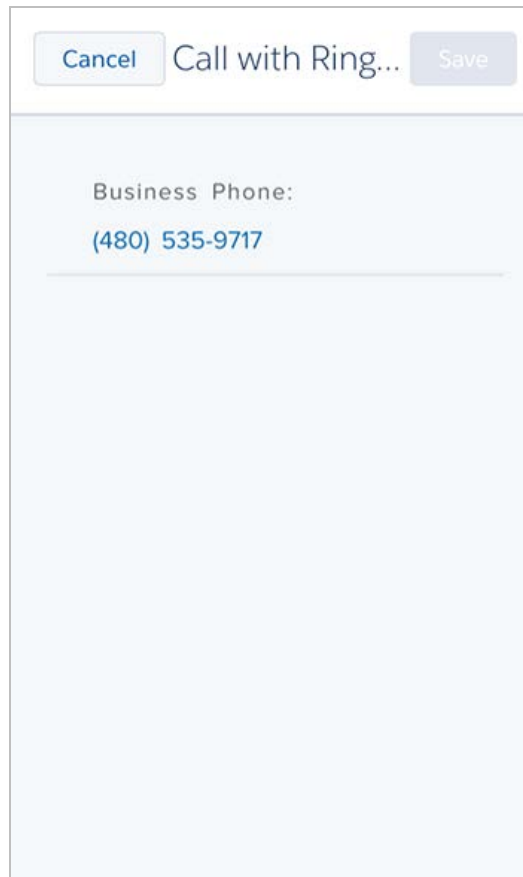


Figure 24

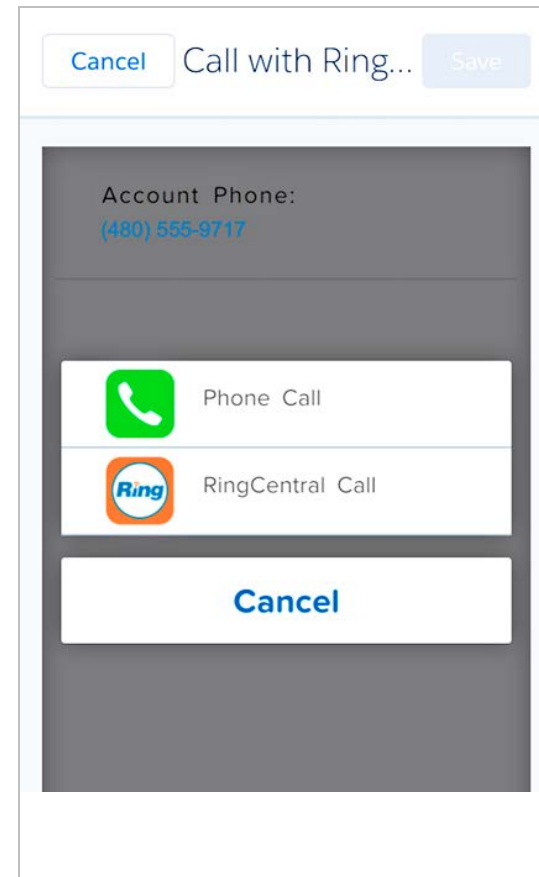


Figure 24

Clicking on the **Call with RingCentral** button will be re-direct you to a page with all the phone numbers of that account/contact/lead listed. Select and click on a phone number. Select **Call with RingCentral** and the phone number will be dialed in your RingCentral mobile app.

## Troubleshooting

**Q: I can't see RingCentral for Salesforce when I login to Salesforce. What is the problem? Does it require some special permission?**

**A:** No, RingCentral for Salesforce does not require any special permissions and it should work for all user profiles. Please ask your Salesforce Administrator to ensure that you are a member of the Call Center and to ensure that no other components on the page are interfering with the operation of RingCentral for Salesforce.

**Q: I don't see any new tab or window opening on incoming calls.**

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

**Q: Can I use RingCentral for Salesforce across multiple Salesforce.com instances (or "orgs")?**

**A:** Yes you can. You will need to contact your Salesforce Administrator to setup and enable RingCentral for Salesforce for each of your orgs.

**Q: Can I use RingCentral for Salesforce across multiple browsers (Internet Explorer and Firefox, for example)?**

**A:** RingCentral for Salesforce can be used across as many browsers as you want so long as the user is not logged into two or more browsers simultaneously. This means that the user cannot be logged into Salesforce.com on Internet Explorer and Firefox at the same time. Simultaneous logins are not supported.

**Q: I make a call to myself, and the incoming call features are not working.**

**A:** This behavior is expected—calls from your own extension to your own extension will not appear in this app.

**Q: I can see some phone numbers in Salesforce, but the click-to-call icon is not displayed.**

**A:** It may be due to some customizations made for your Salesforce account. Please contact your Salesforce Administrator.

**Q: I cannot find the RingCentral call and SMS options in Salesforce1.**

**A:** Please contact your Salesforce Administrator if the actions are added to the Page Layouts.

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

**A:** You will have to request that your Salesforce Administrator remove you from the Call Center profile list.

**Q: What Operating Systems and browsers are supported?**

**A:** The following Operating Systems are supported:

- Windows 7+
- Mac OS

**A:** The following browsers are supported:

- Google Chrome 56+
- Mozilla Firefox 52+
- Microsoft Edge
- IE 11