



RingCentral for Salesforce

User guide
v6.18.0

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.

Requirements

Salesforce Edition:

- Professional, Enterprise, Unlimited

RingCentral Subscription:

- MVP Premium and above

Hardware Requirements ([for the best Salesforce experience](#)):

- An Octane 2.0 score of 30,000 or greater
- Network latency of 150 ms or less
- Download speed of 3 Mbps or greater
- At least 8 GB of RAM, with 3 GB available for Salesforce browser tabs

Recommended Operation System and Software Requirements:

- The latest Windows or Mac OS, 32 or 64-bit
- Current (-1) version of Chrome, Firefox, Edge (Chromium) or Safari
- The latest RingCentral application (optional)
- The latest RingCentral Phone application (optional)

Minimum Operation System and Software Requirements:

- Windows XP SP2
- Mac OS X 10.8
- Chrome 56, Firefox 52, Safari 6.0.5



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.

This User Guide for Salesforce Lightning is specifically for RingCentral for Salesforce version 6.18.x. All previous and related guides for RingCentral for Salesforce can be accessed from the [Salesforce AppExchange](#).

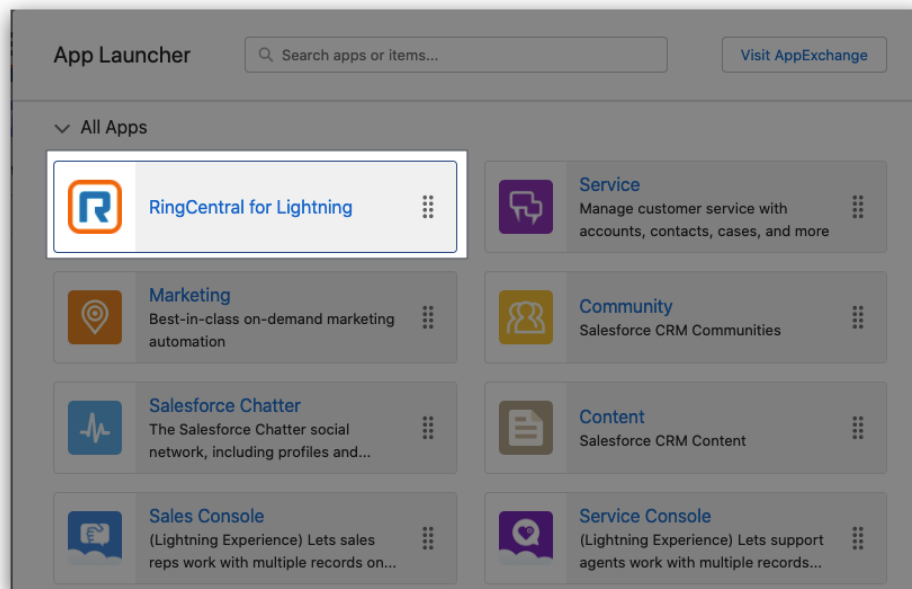
Initiating RingCentral for Salesforce

When RingCentral for Salesforce has been installed and configured by the administrator of the organization, the end-users can find the RingCentral CTI within Salesforce.

This part of the guide will show how to access the RingCentral CTI and the basic login process.

Launch the RingCentral for Salesforce

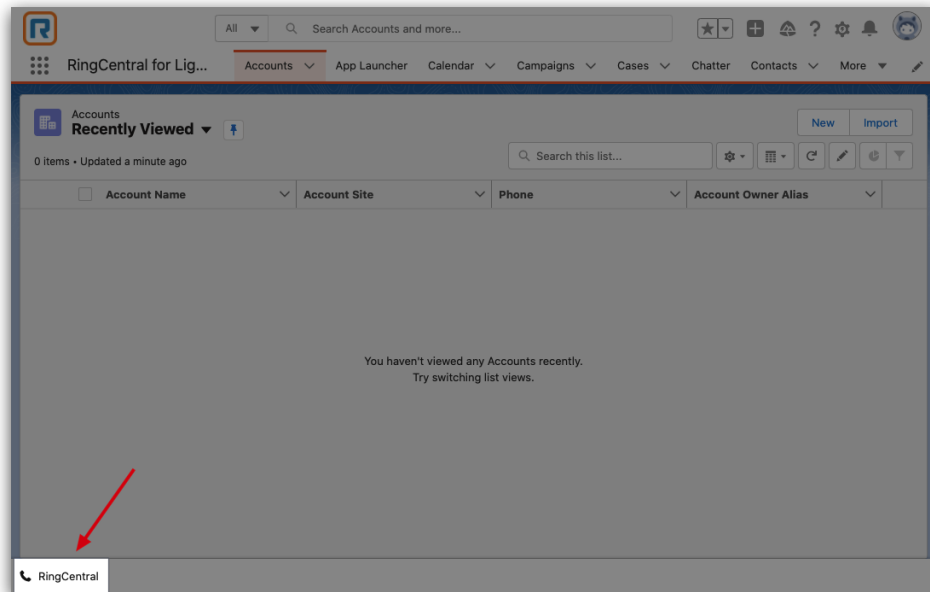
RingCentral for Salesforce will create a Salesforce App named RingCentral for Lightning. Users can find this app in the Salesforce App Launcher if the user has been granted access to this App.



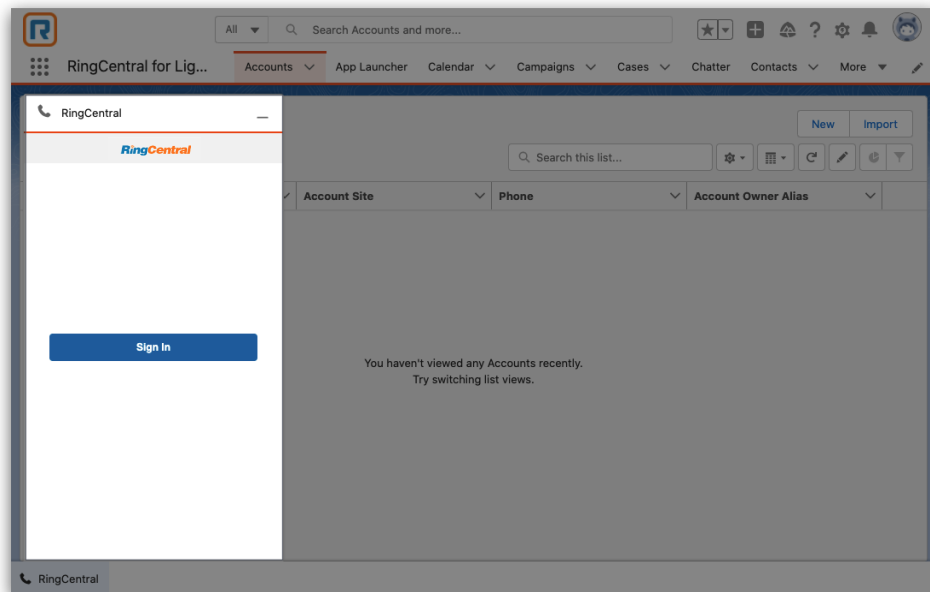
In some organizations, the Admins might decide to hide this app from end-users or add the CTI to some other apps. In this case, ask the organization's admin where the CTI app is located within Salesforce.



For any apps the CTI has been added to, the end-users can find the CTI entrance on the button of the page.



Click it and the CTI page will pop up to allow login.

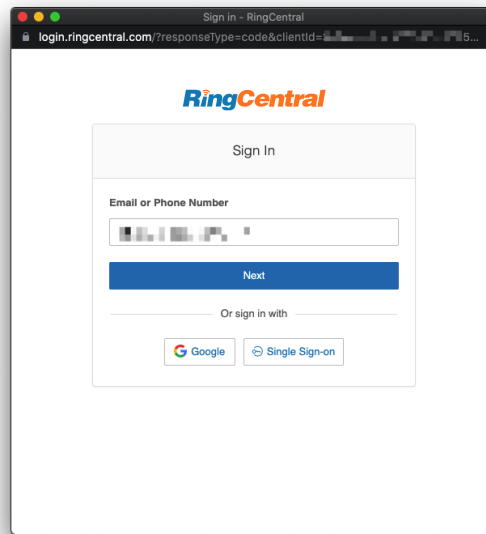




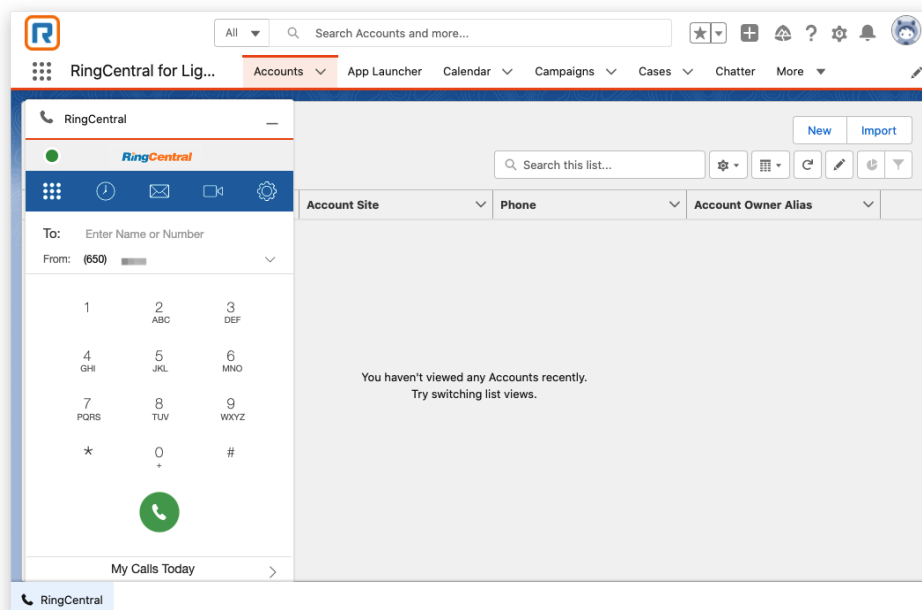
Log in to RingCentral for Salesforce

Click on the Sign-in button to initiate the login process. Use your RingCentral account to log in to RingCentral for Salesforce.

If there are any problems getting a RingCentral account, contact your organization admin.



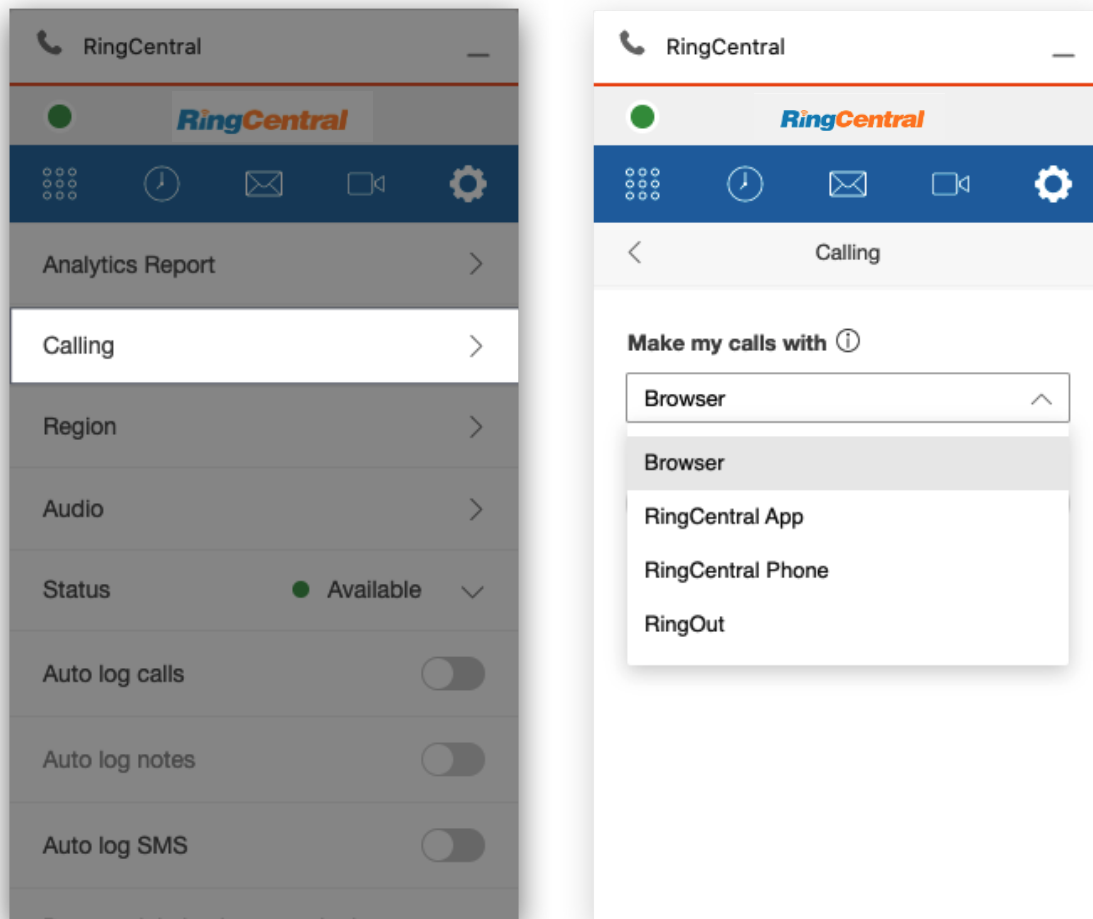
After successfully logging in, the user can see the RingCentral for Salesforce in the app.



Calls

Call mode setting

RingCentral for Salesforce provides 4 calling modes. Navigate to Settings → Calling for the list of modes.



They are:

- Call with the browser (Recommended)
- Call with the RingCentral App
- Call with the RingCentral Phone
- RingOut

For the best telephony experience, the “Call with the browser” mode is recommended.

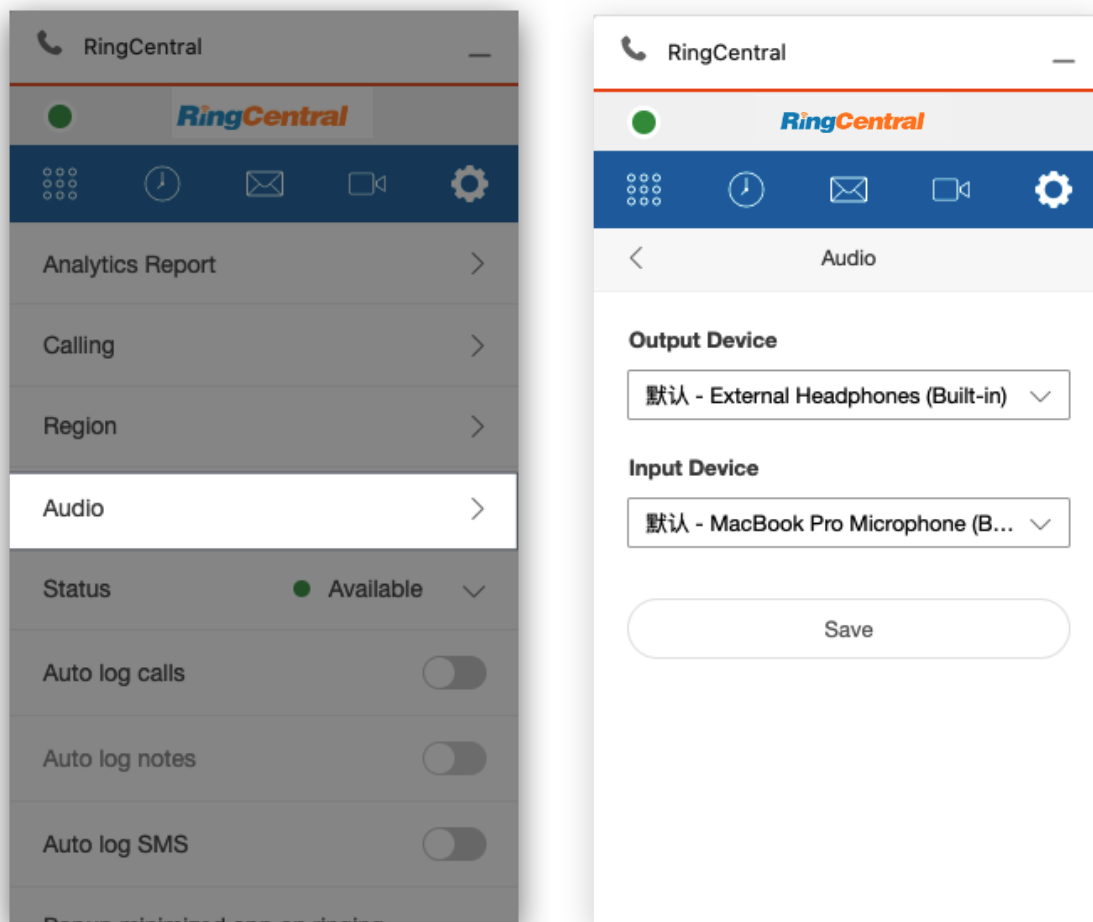


Environment requirement for each mode

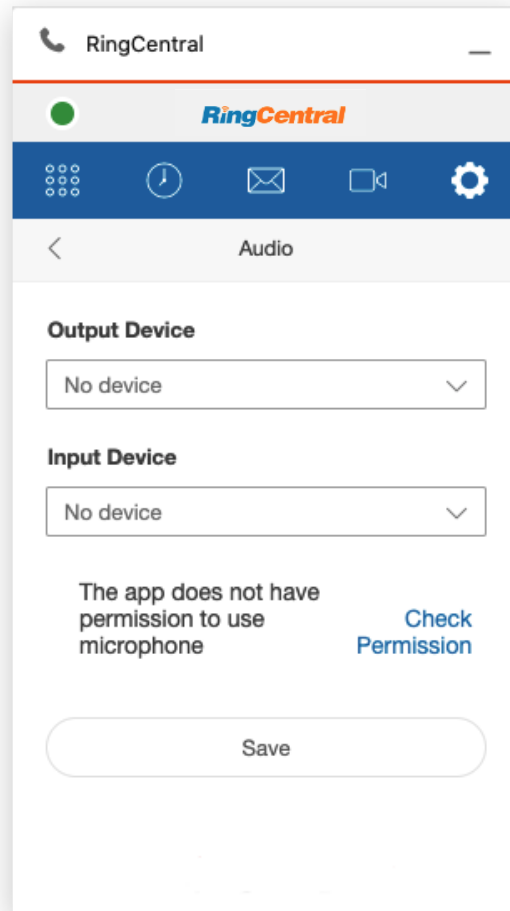
- Call with the browser
Only a browser that supports WebRTC is needed.
- Call with the RingCentral App
The RingCentral App should be installed on the same PC/Mac, and logged in with the same RingCentral account as RingCentral for Salesforce.
- Call with the RingCentral Phone
The RingCentral Phone should be installed on the same PC/Mac, and logged in with the same RingCentral account as RingCentral for Salesforce.
- RingOut
Another phone device with a valid phone number.

Audio setting

The audio settings are only available for Call with the Browser mode. Navigate to the Settings → Audio.



The Audio settings allow users to select their audio input and output devices. Additionally, when audio permissions are blocked by the browser, the user can re-initiate the access request.

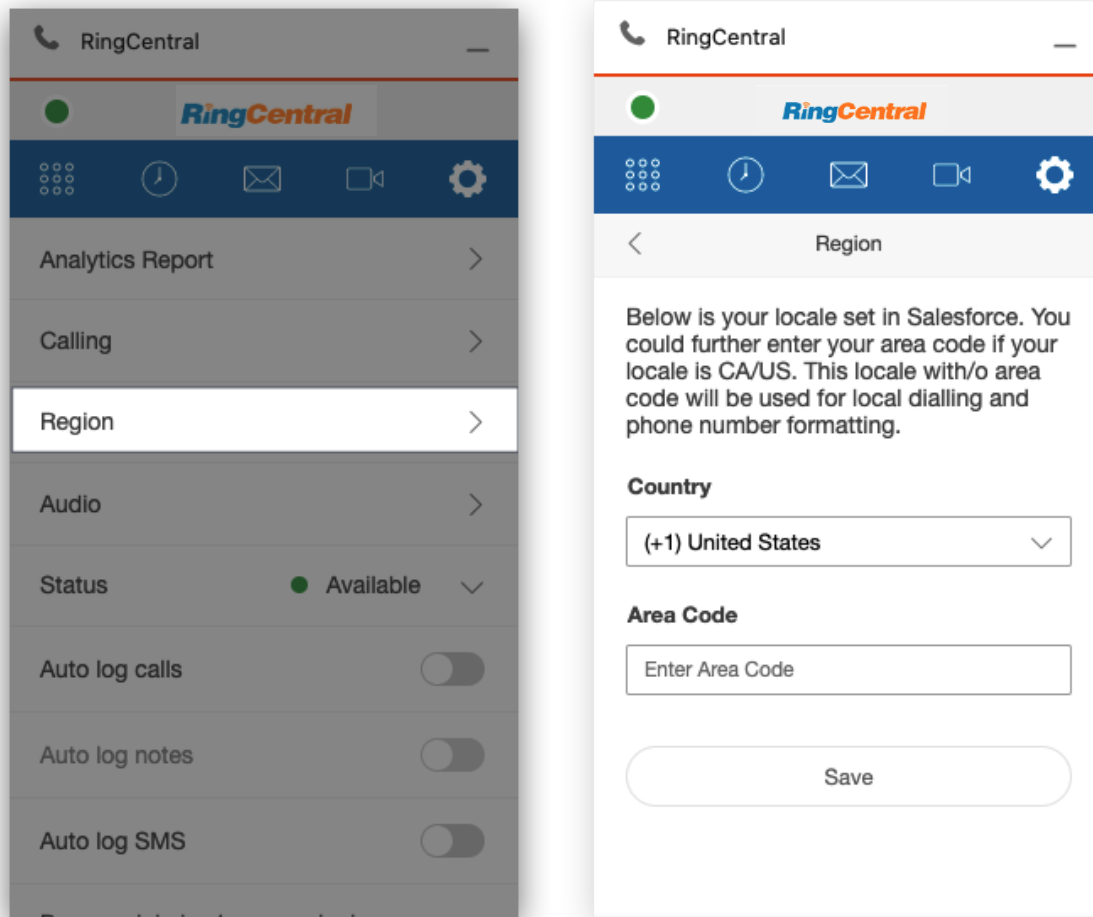


Click the Check Permission hyperlink, the App will ask to grant browser audio permissions.

Please grant RingCentral for Salesforce to access your audio. ×

Region setting

The Region setting is to set up the current location of the user. The app will format a 7 or 8 digit local phone number to an E.164 formatted phone number with the country code and the area code in the region setting.

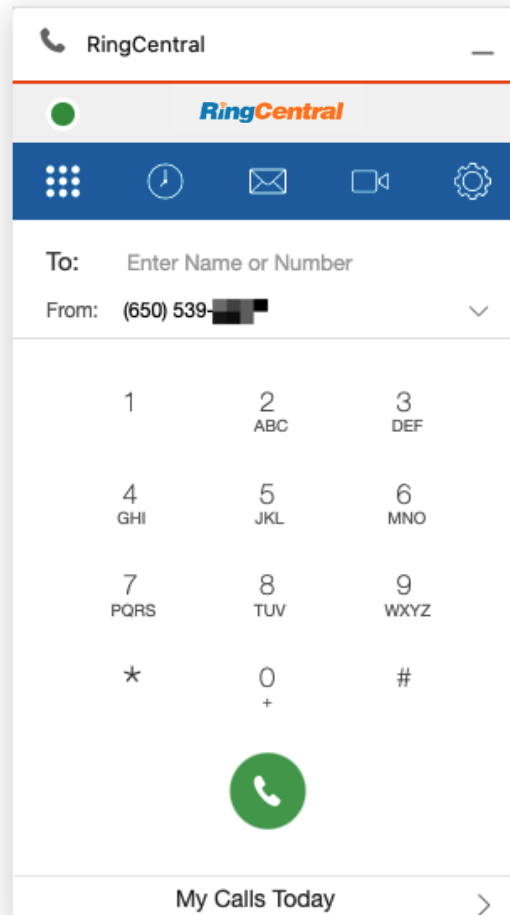


By default, the app follows the region settings in the current Salesforce organization. The end-user can still select the region as needed.

For example, select the Country (+1) United States, and enter Area Code 650. when the user dials the "local" number 539xxxx, the app is actually dialing +1650539xxxx.

Dialer page layout

The Dialer page is the app's home page. Users can make outbound calls from this page.

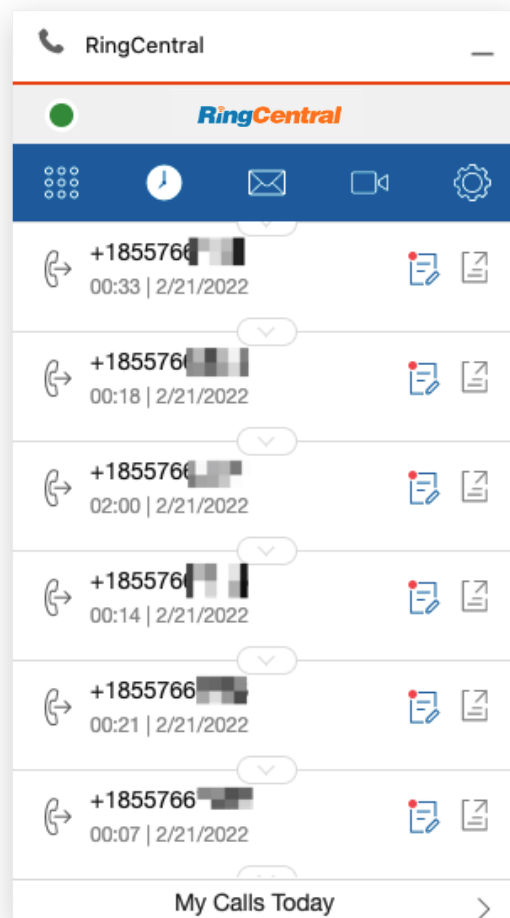


The To: field is for phone number input. You may use the keypad to dial or select alphanumerics from the keyboard to search for additional records.

The From: field is for the user to select the direct numbers to make outbound calls. This is also the phone number that the person receiving the call will see on their Caller ID screen.

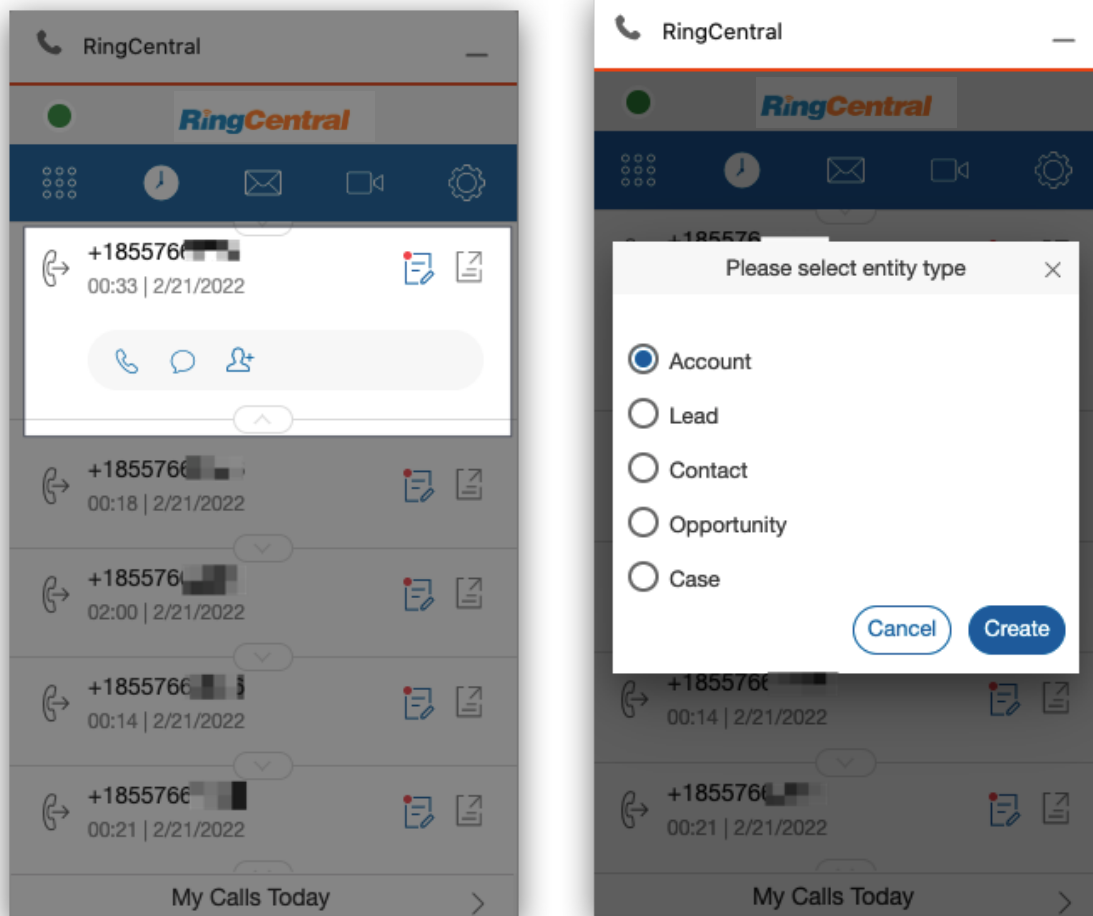
Call history page layout

The Call history page shows the call history of the current user. To ensure the best performance, only the last 7 days or the last 250 calls will be shown on the list.



The Call log status will be shown on the call history page. See more details on the Call logging session section in this guide.

The user can also find some handy tools on the expansion on the call history page. Including Call back, Send SMS, and Add/View contact details.



When the phone number of an inbound call matches a Salesforce record, this button will open the Salesforce record detail page.

When the phone number does not match a Salesforce record, this button is used to create a new record type in Salesforce.

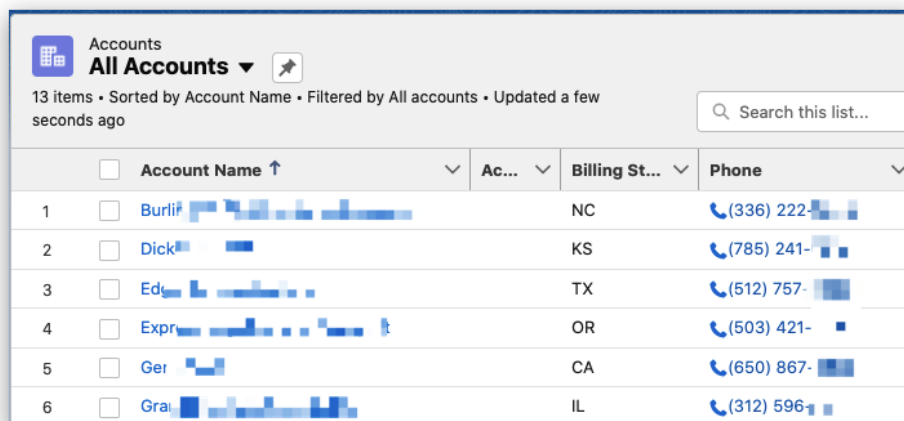
Outbound calls

RingCentral for Salesforce supports multiple ways to make outbound calls.

Click to Dial

When the user logs into the app, the Phone type fields turn to clickable hyperlinks. When the user clicks the hyperlink, a call will be made to the phone number using the RingCentral for Salesforce app.

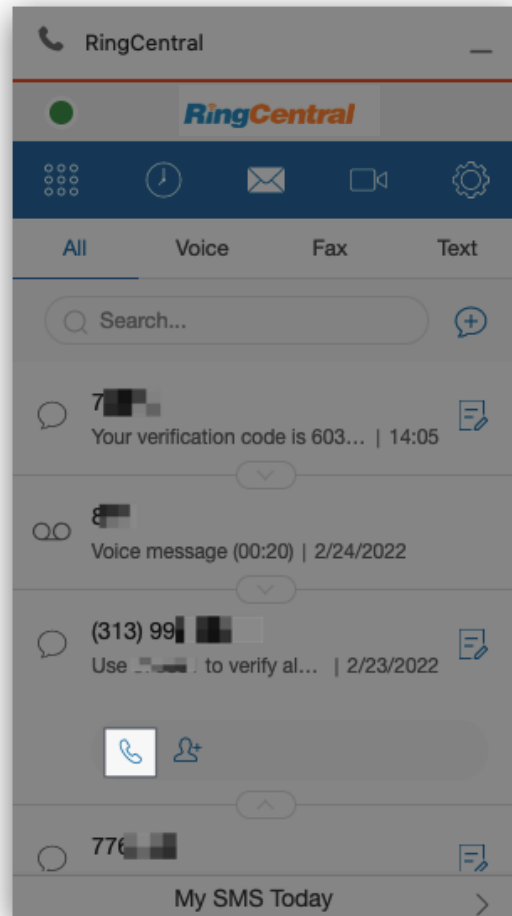
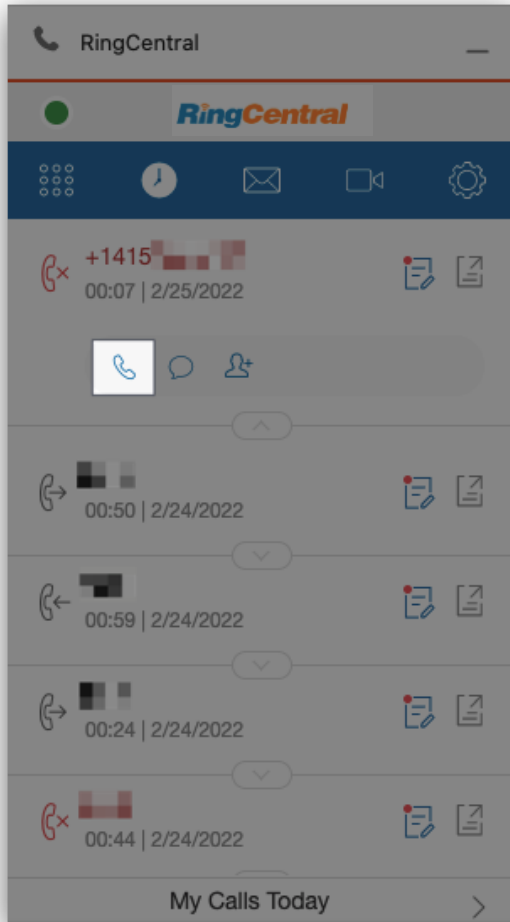
If the “Autofill Related-To in Call Log for Click To Dial” option in the Admin Setting has been switched ON, the Salesforce record that was clicked will be brought to the Call log page.



	<input type="checkbox"/> Account Name ↑	Ac...	Billing St...	Phone
1	<input type="checkbox"/> Burlif		NC	☎ (336) 222-...
2	<input type="checkbox"/> Dick		KS	☎ (785) 241-...
3	<input type="checkbox"/> Ed		TX	☎ (512) 757-...
4	<input type="checkbox"/> Expr		OR	☎ (503) 421-...
5	<input type="checkbox"/> Ger		CA	☎ (650) 867-...
6	<input type="checkbox"/> Gra		IL	☎ (312) 596-...

Call back from history

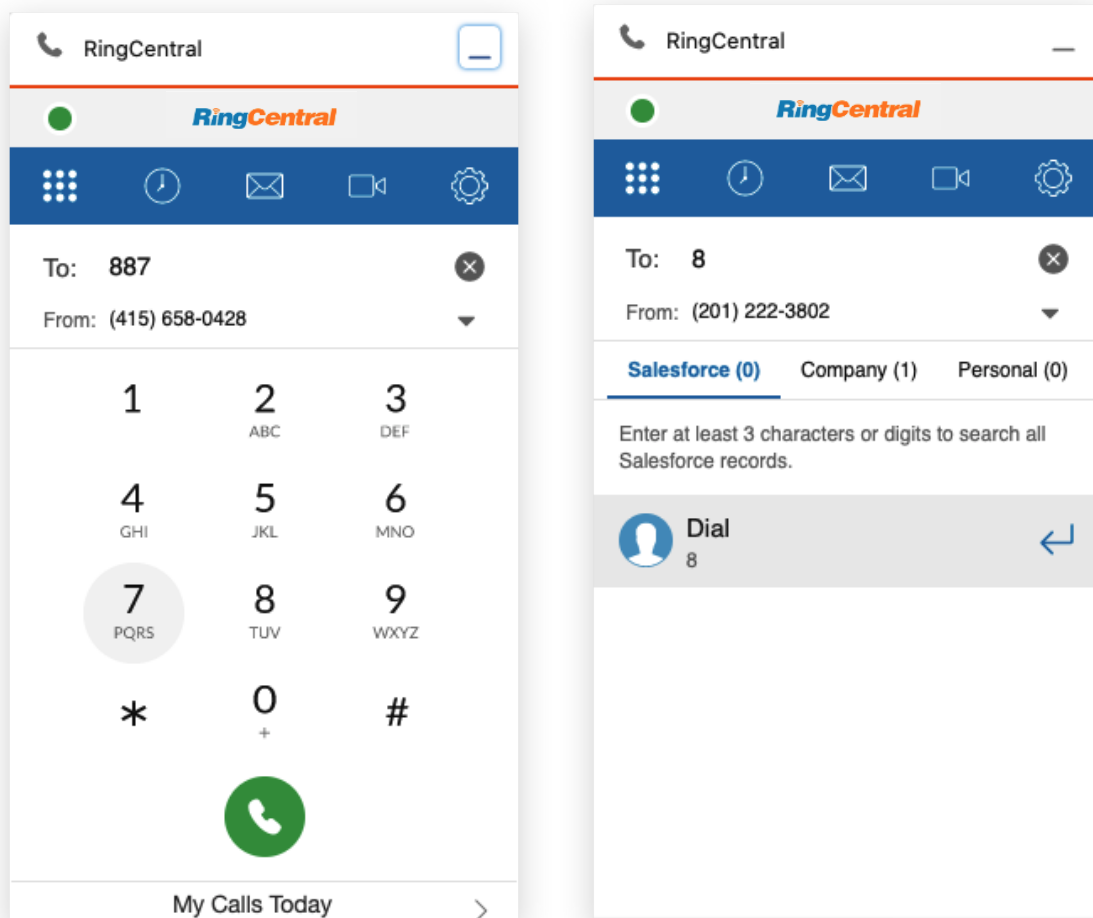
The user can also call back from the Call history or the SMS history list. When clicking the call back button from the history list, the match result will be brought to the new call.



Call from dialer

To make outbound calls from the dialer, users can either click the numbers and make the call from the dialer page or type in the To field to make calls.

When the user is clicking the phone number from the dial pad, the app will allow the user to continue clicking. However, when the user is typing from the keyboard in the To field, the directory search page will open.



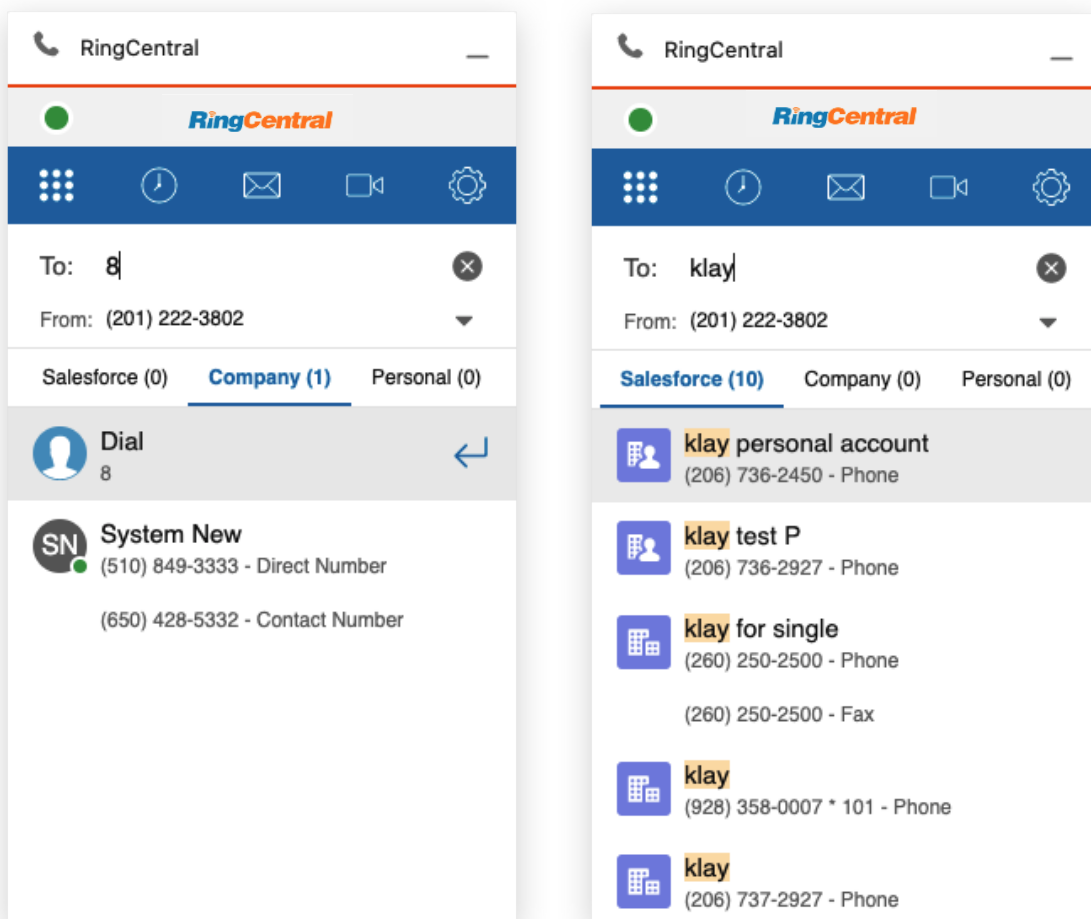


The user can navigate between the directory sources to find a target record.

When the user types in more than 3 characters, the app will auto initiate the search into Salesforce.

The searched Salesforce record types were set up by the Admin in the Admin setting.

The user can click any search result to make an outbound call.



Inbound calls

In the call with browser mode, the user is able to answer inbound calls within the integration app.

When there's an inbound call, the app will open its call log and control page if there's currently no existing call log and/or control page open.

The app will show the caller info with the match result from all directory sources, including Company Directory, Salesforce Records, and Personal Contacts.

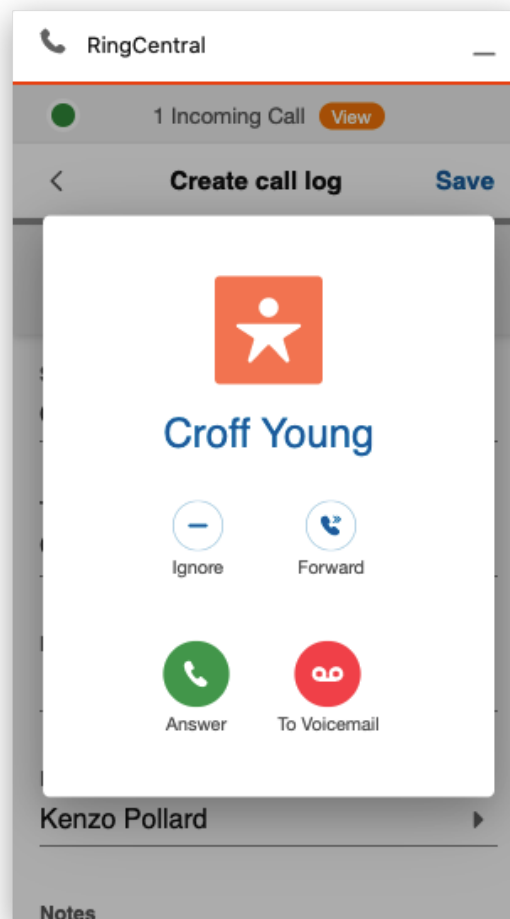
The screenshot displays the RingCentral mobile application interface. At the top, the status bar shows 'RingCentral' with a signal strength indicator. Below this is a header bar with the RingCentral logo and a green status indicator. The main screen is titled 'Create call log' with a back arrow on the left and a checkmark on the right. A call log entry for 'Croff Young' is shown, with a green background. The entry includes a phone icon, the name 'Croff Young', the duration '00:04', and the time '1:27 PM'. Below the call log entry, there are four input fields: 'Subject' with the value 'Inbound from +15203995724', 'Type' with a dropdown arrow, 'Name' with the value 'Croff Young', and 'Related to' with a dropdown arrow. At the bottom, there is a navigation bar with four icons: a blue phone icon, a blue minus icon, a red plus icon, and a green phone icon.

In the call log and control page, the user can

- Forward the call to another number
- Ignore the call
- Forward the call to voicemail and reject the call
- Answer the call.

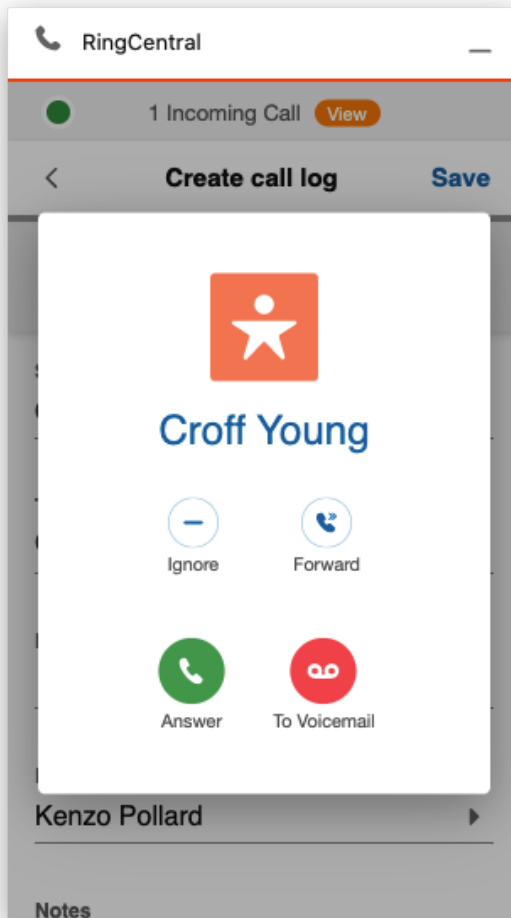
Find more details about inbound call controls on the call control session.

If there's already a call log page in the front of the App, the app will show a notification for an inbound call. If the user decides to answer the new inbound call, its call log session will open. Otherwise, calls will stay on the former call log page.



Call Control

Inbound call control



- Ignore the inbound call

The inbound call will be ignored. The caller will not notice but only hear the call ringing without answering. The CTI will stop ringing for this call.

- Forward the inbound call

Forward the inbound call to a pre-set phone number or a custom phone number. When the call is forwarded, the CTI will stop ringing for this call.

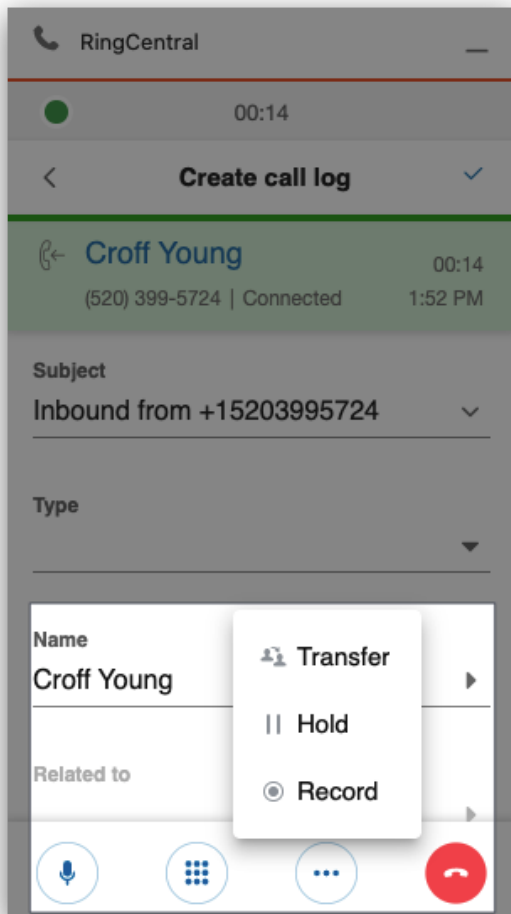
- Forward the inbound call to Voicemail

Forward the inbound call to the user's voicemail. When the call is forwarded, the CTI will stop ringing.

- Answer the inbound call

The inbound call will be answered. The call status will be changed from ringing to connected. the call log and control page will automatically open.

Connected call control



When a call is connected, the user will be able to find the call controls on the call log and control page. including

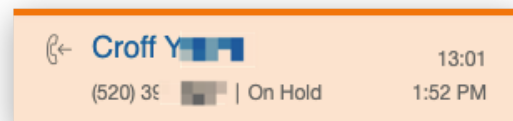
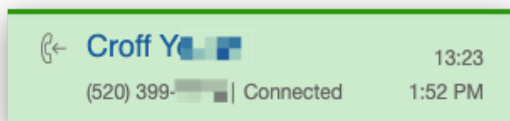
- Mute/Unmute  

Mute the voice input of the CTI. The user can still hear the voice from the other party of the call. Click to switch between Mute and Unmute status.

- Hold/Unhold 

Switch the status of the call between Hold and Unhold. While the call is in Hold status, both parties can not hear or speak to each other. The telephony system will play pre-set hold music.

The call information session on the call log and control page will turn orange for status notification.



- Record/Stop recording/Resume recording 

Switch the recording status between Recording and Not recording. Each time when the recording was initiated, the telephony system will play the recording notification audio.

If there are several recordings (Record → Stop → Resume → etc.) in a call, all recordings will be merged into a single recording.

The Administrator of this org set up mandatory recording for all calls. In this case, the end-user will not be able to switch the recording status.

When a call is being recorded, the CTI will show status notification for the call.

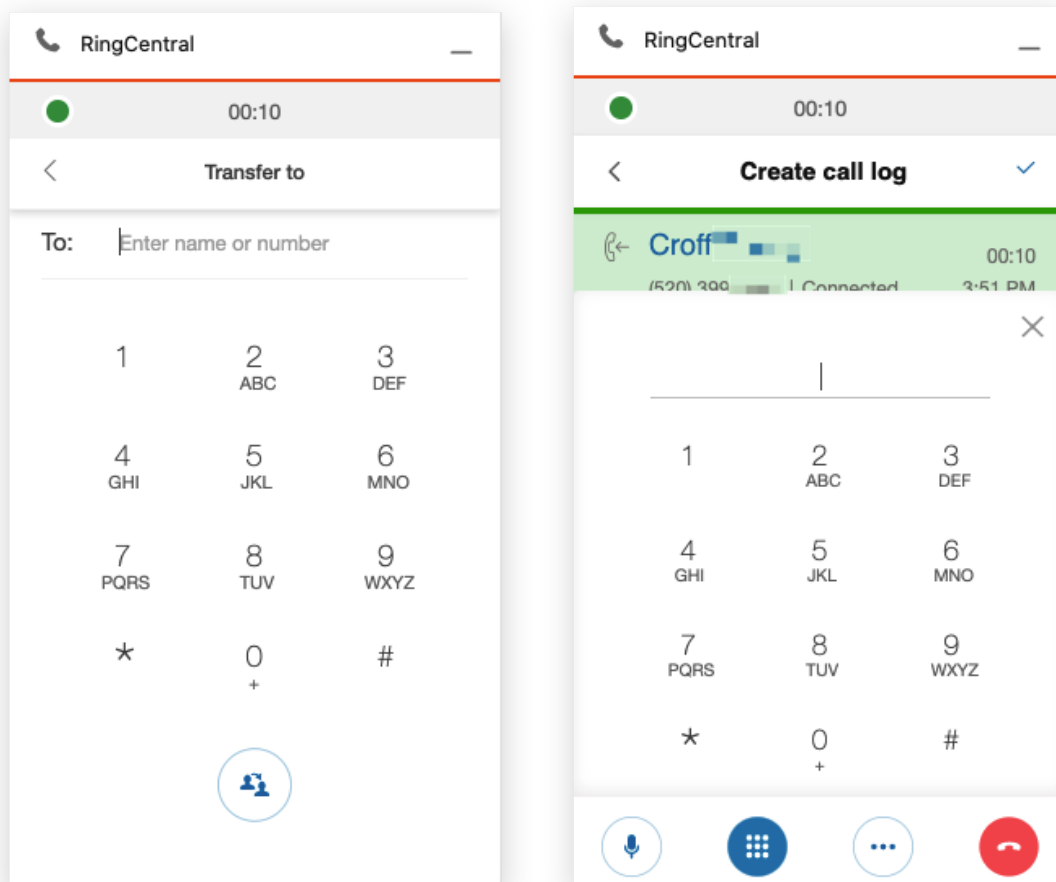


- **Transfer**

The user can transfer the current call to a phone number or contact from Salesforce records, Company Directory, or Personal contact. Enter the phone number and click the complete transfer button, the call will be transferred to the phone number.

- **Keypad**

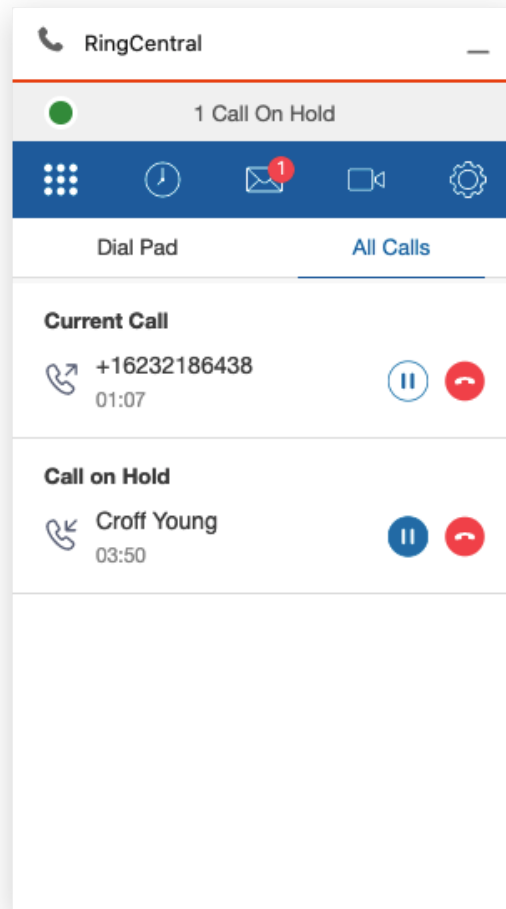
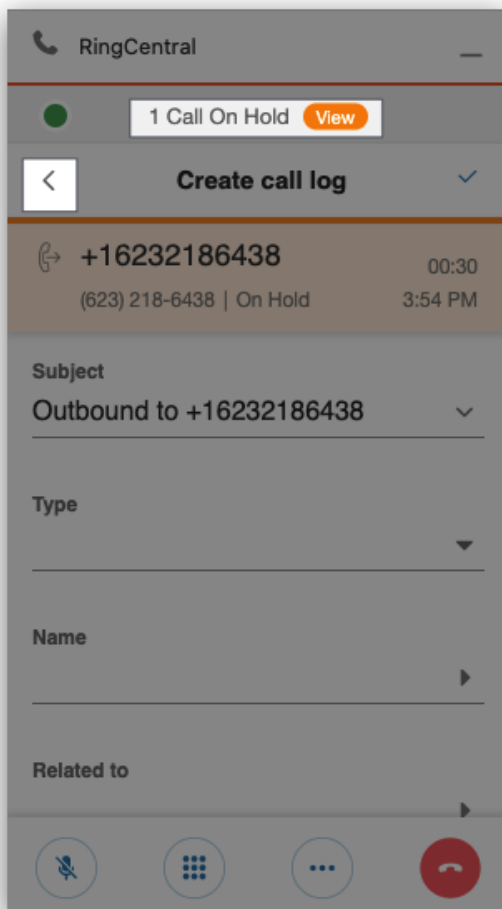
When the user needs to enter DTMF tones during a call, they can open the dial pad for more actions.



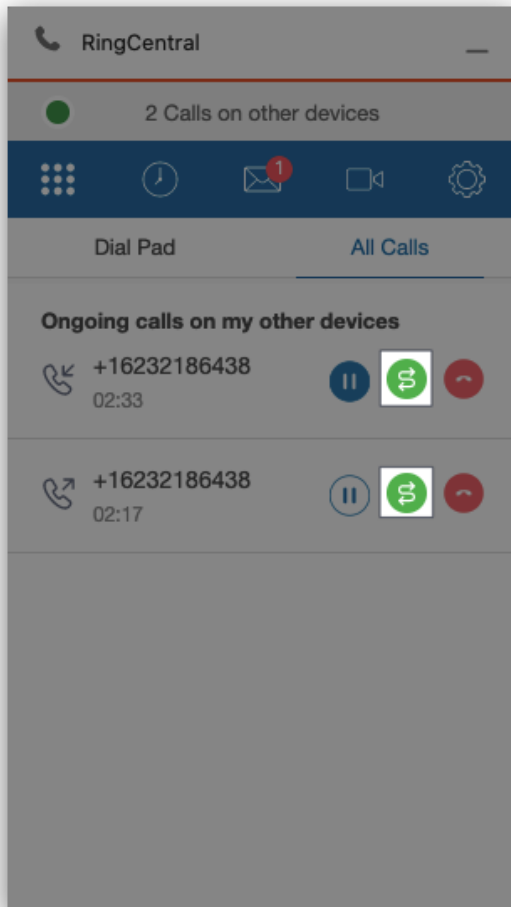
Multiple calls control

When there are multiple calls on the app, the user can control all calls in one interface. Click the goes back button in the call log and control page, or the View button on the header to open the All Calls page.

All calls will be listed on the page, and the user can easily switch between them.



Call control in multiple tabs



Many Salesforce users open multiple tabs while working. To ensure call connection and audio quality, RingCentral for Salesforce provides a solution for multiple tabs call controlling.

1. When calls have been connected in multiple tabs, the audio connection will always be merged to the latest connection.
2. When there are calls on other tabs, the user can always take the call to the current page.

Call logging

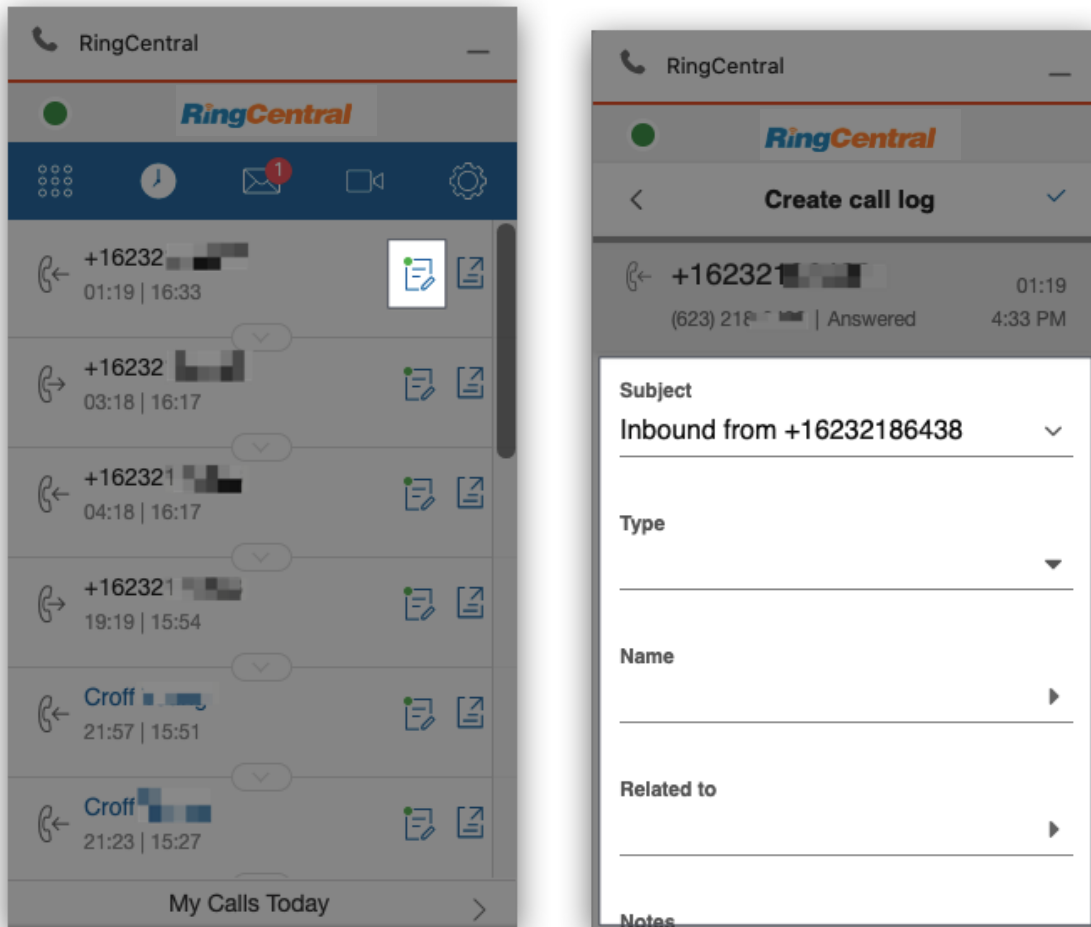
On the Call logging and control page, the user can log the call to Salesforce. The user can either log it during an active call or later, from the call history list.

Log during an active call.

The screenshot shows the RingCentral mobile app interface during an active call. At the top, the status bar displays 'RingCentral' and a green indicator light. Below this, a grey bar shows the call duration '00:24'. The main header is a dark grey bar with a back arrow, the text 'Create call log', and a checkmark. The call details section shows an incoming call from '+16232186438' with a duration of '00:24' and a time of '4:33 PM'. Below this, the form fields for creating a call log are visible: 'Subject' (Inbound from +16232186438), 'Type' (dropdown menu), 'Name' (text input), and 'Related to' (text input). The bottom navigation bar contains four icons: a microphone, a grid of dots, a three-dot menu, and a red hang-up button.





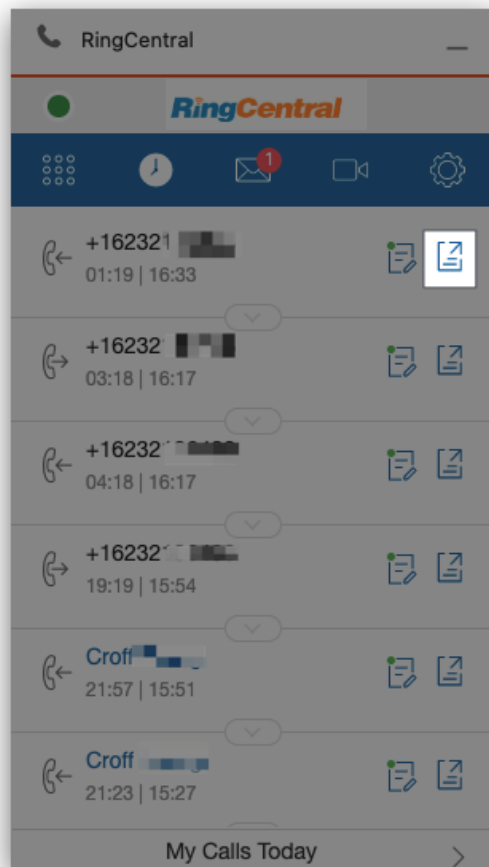
Log or update a historical call



The call log fields are defined by the admin of the organization.

The user can view the call log in Salesforce by clicking the view button on the call history list. The user can also see the call logs from the record activities.

The Call log button is also showing the call logging status. When the icon is red  , it means that the call has not been logged yet. When the call log icon is green  , it means that the call has been logged.



Croff Young

[+ Follow](#)

Title

Company
WuliShan

Phone (2)
[\(520\) 399](#)

Email

Sales Engagements

Last engaged:

Engagements within 30 days:

0

0

0

0

0

Sales Cadence Steps

[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

No next steps.

To get things moving, add a task or set up a meeting.

March • 2022

This Month

Inbound from +15203

You logged a call

Today

Inbound from +15203

You logged a call

Today

Inbound from +15203

You logged a call

Today

Inbound from +15203

You logged a call

Today

Inbound from +15203

You logged a call

Today

Inbound from +15203

You logged a call

Today

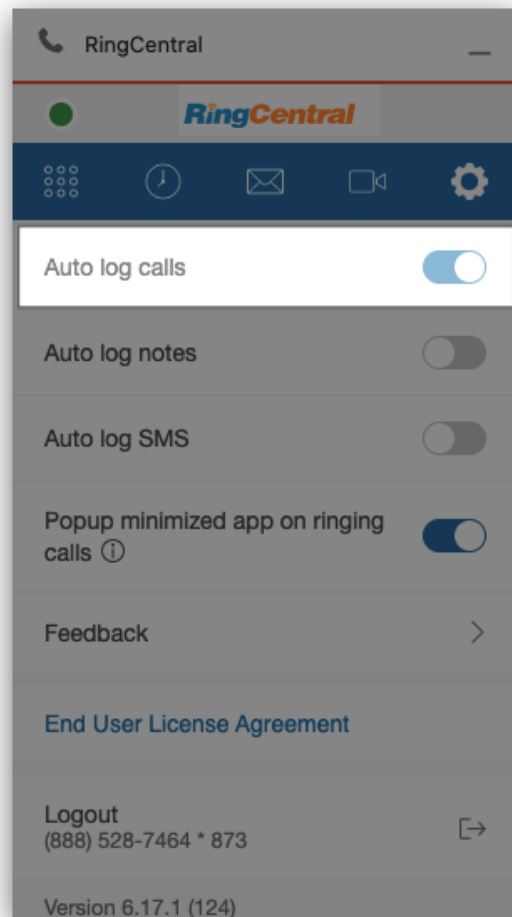
Inbound from +15203

You logged a call

Today

Auto log calls

When the admin has enabled an Auto Log calls strategy in the Admin Setting, the Auto log calls setting will be set ON and manual call logging will be disabled in the end-users interface.



Otherwise, the end-user is allowed to switch the setting ON/OFF.

When this setting is ON, when there's an active call (Inbound or Outbound), the app will auto-create a call log to the matched Salesforce record.

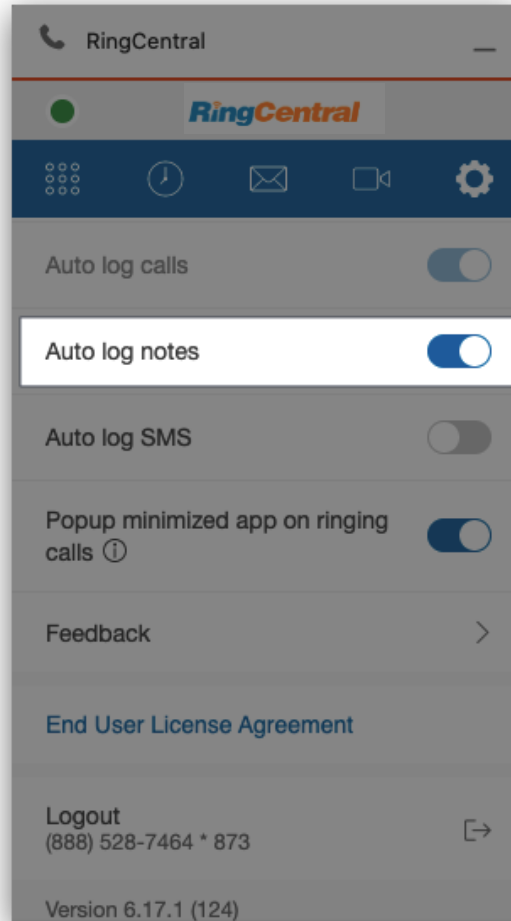
The call log could be created when the call was ringing or answered, dependent on the Admin Setting.



Auto log notes

The Auto log notes setting is only available when Auto log calls is set to ON.

When the Auto log notes setting is ON, all edits on the call log page in the app will automatically update to the call log record in Salesforce.





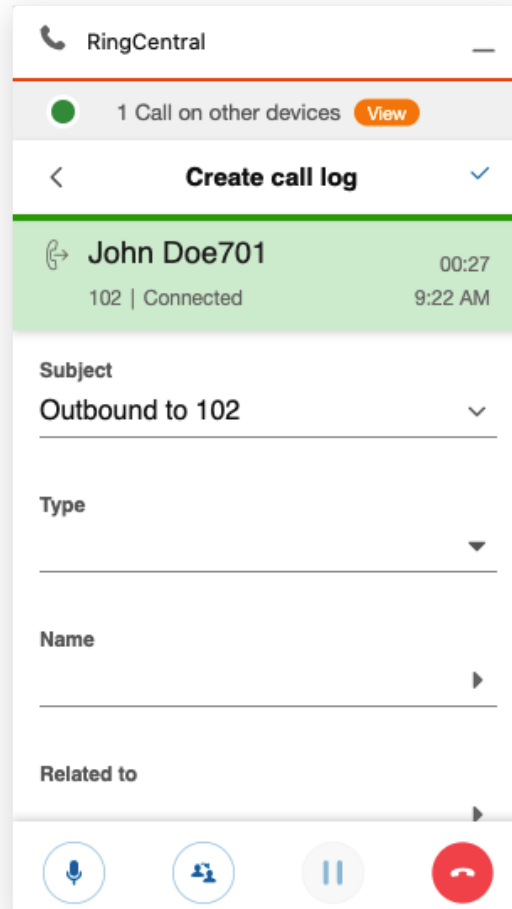
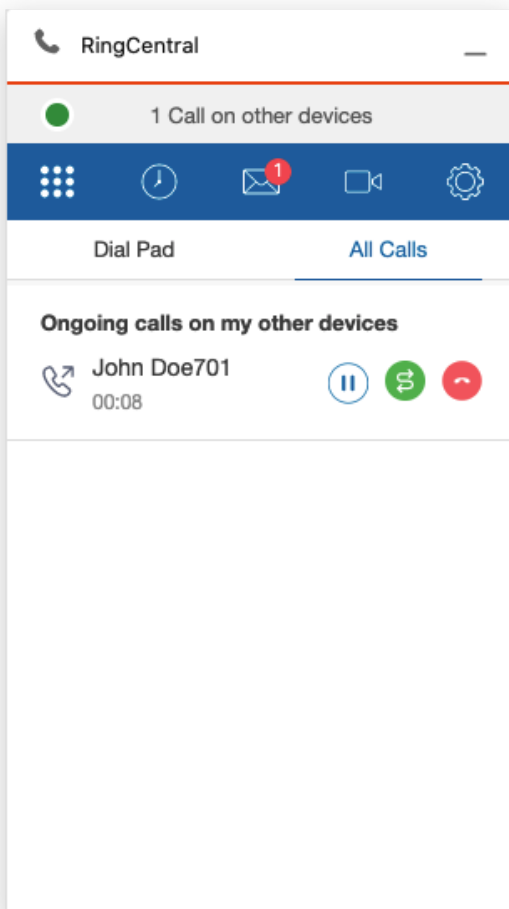
Calls on other devices

If the RingCentral for Salesforce is working on other call modes, the app will show all calls under the same account to the app, so that the user can easily log any calls that are happening on any devices.

Click on the call item and the user can start logging the call.

The RingCentral for Salesforce offers limited call control for calls on other devices. They are

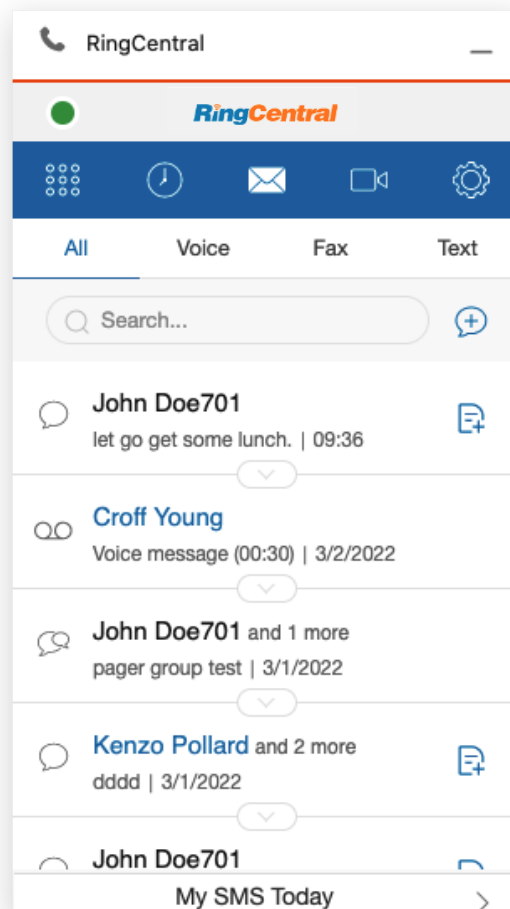
- Mute/Unmute
- Transfer
- Hold/Unhold
- End the call



Message


Message List

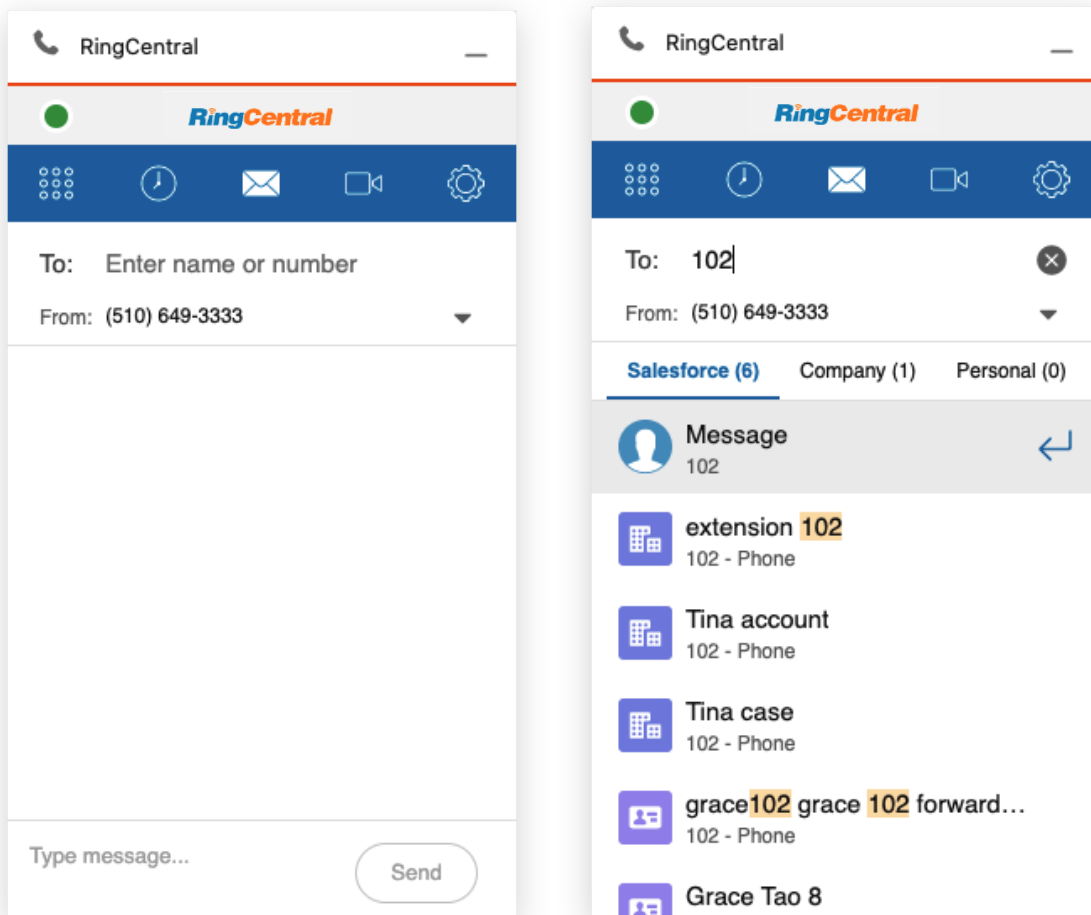
RingCentral for Salesforce provides Fax, Voicemail and SMS services. The user can access these services within the Message page by clicking on the “envelope” icon..



The user can access all Message types within this section, and can listen to voicemails, read incoming fax documents, and send and receive SMS messages from and to customers.

Compose SMS

Click the  button to compose a SMS. User may send messages to contacts within their directory or directly to an end users SMS number.



The user can send a SMS to multiple recipients at one time. When an SMS is sent to multiple addresses, all SMSs will break into individual conversations.

RingCentral

RingCentral

To:

Albert

klay

Enter name or number

From: (510) 649-3333

Nice to meet you!

Send

RingCentral

RingCentral

All Voice Fax Text

Search...

Albert

Nice to meet you! | 10:33

sds and 4 more

Nice to meet you! | 10:33

John Doe701

let go get some lunch. | 09:36

Croff Young

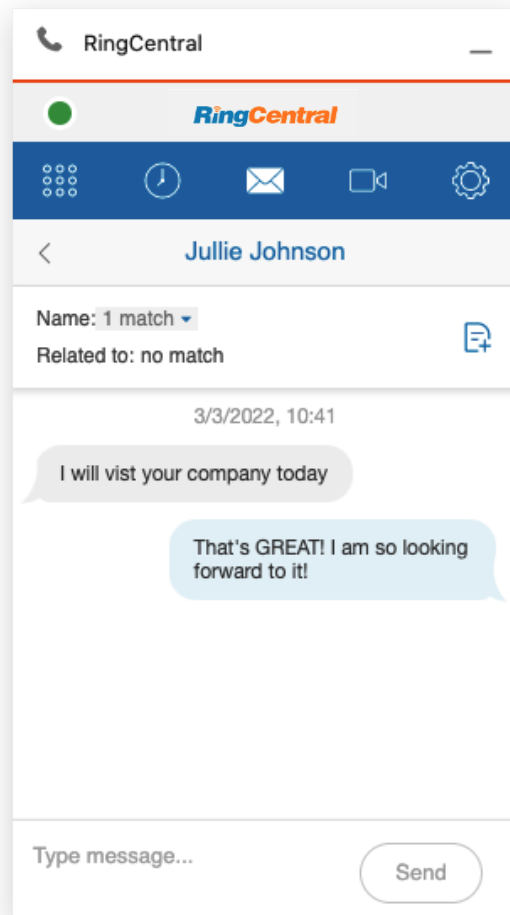
Voice message (00:30) | 3/2/2022

John Doe701 and 1 more

My SMS Today

SMS conversation

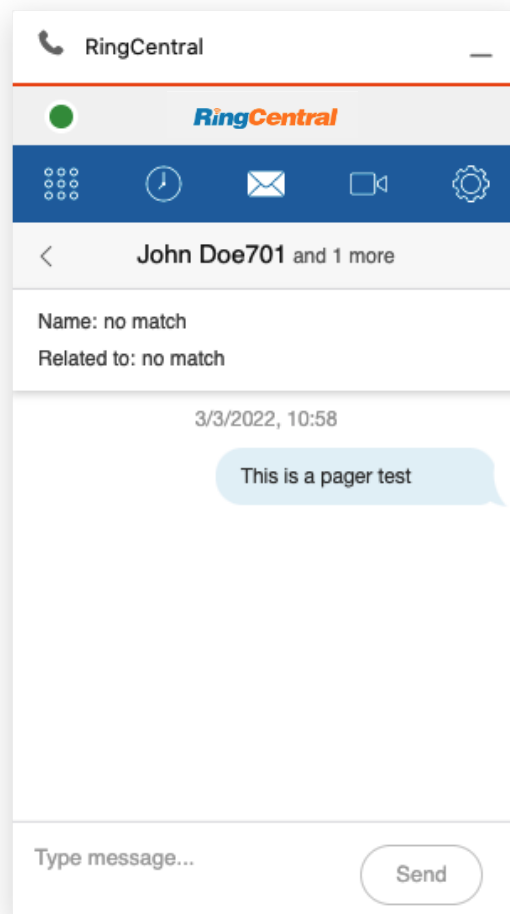
When an SMS is sent or received, a conversation is created. All new SMS messages that are sent or received with the same phone number will be automatically merged into the conversation.





Internal pager

RingCentral for Salesforce allows internal users to use the internal pager functions. It supports peer to peer pager and group pager.

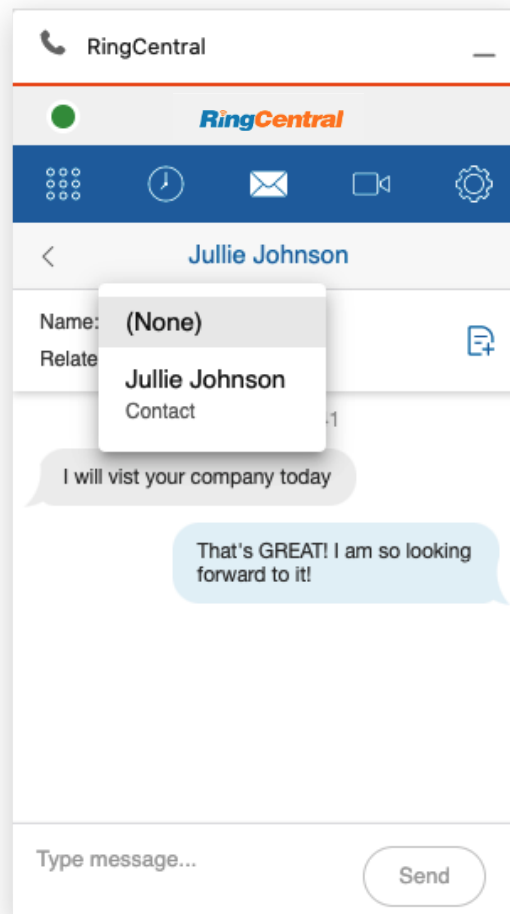




Log SMS

The user can log SMS conversations into Salesforce. Click the Name or the Related to dropdown, all Salesforce records that match to the phone number will be listed.

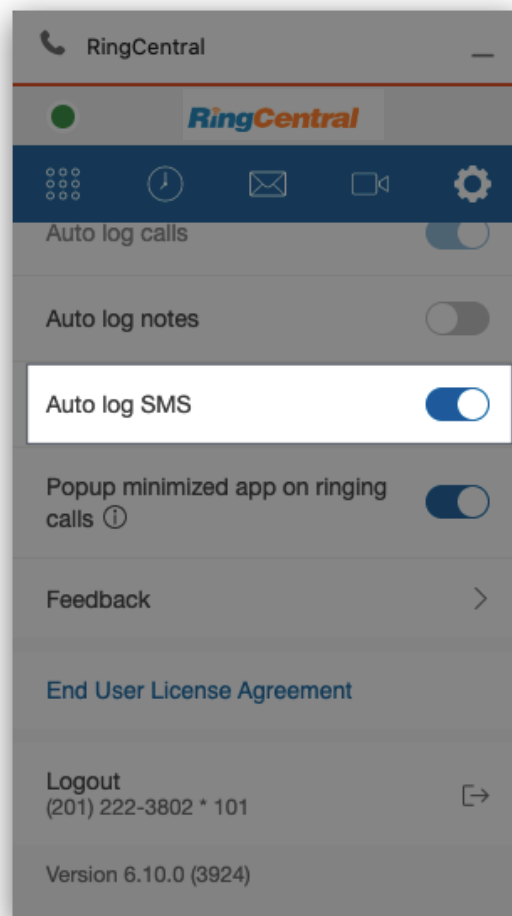
Select a matching record and click the log button to log the conversation.





Auto log SMS

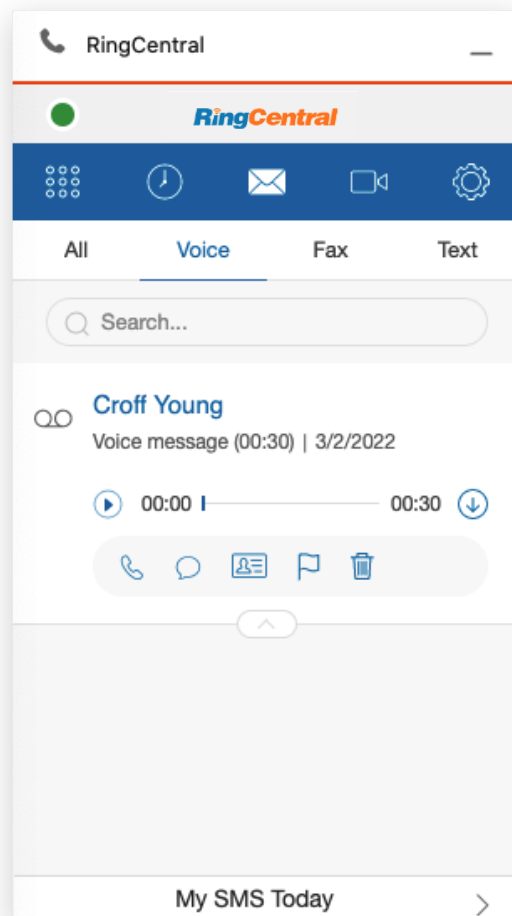
When the auto log SMS is ON, the app will automatically update the Salesforce log records when the conversation was updated.





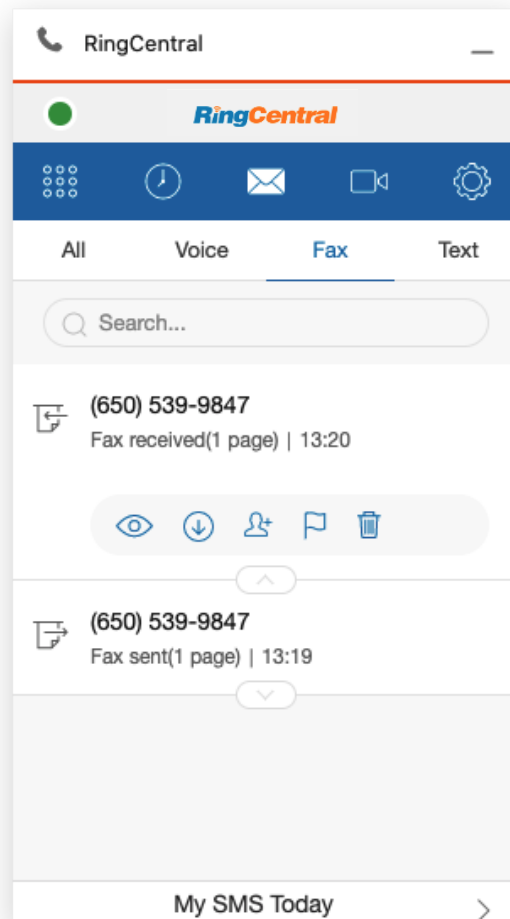
Voicemail

Users can listen to a voicemail message, download it, call back, SMS back, or delete the voicemail.




Fax

Users can read a Fax file, download it, or delete the Fax.



Edit Albert Wen's RingCentral Video meeting


Assigned To

 RingCentral Demo


×

Location

https://v.ringcentral.com/join/5340



Subject


 i's RingCentral Video meetin

Q

Start


Date

Mar 3, 2022




Time

1:00 AM



Name


 Search Contacts...

Q

End


Date

Mar 3, 2022




Time

2:00 AM



Related To

 Search Accounts...

Q

All-Day Event

☐


Created By

RingCentral Demo, 3/3/2022, 12:58 AM

Last Modified By

RingCentral Demo, 3/3/2022, 12:58 AM

Description

 has invited you to a RingCentral Video meeting.

Please join using this link:

Cancel

Save & New

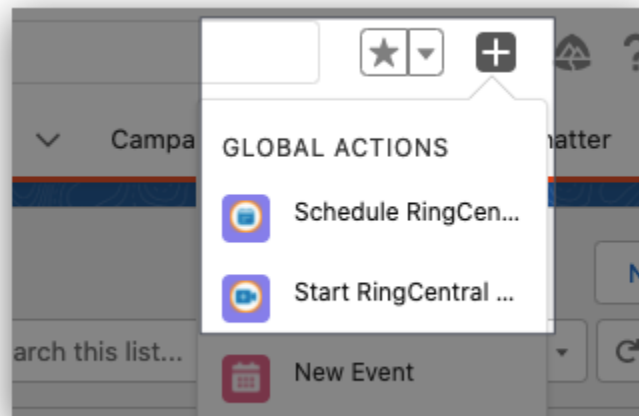
Save

RingCentral for Salesforce would create a meeting in Salesforce and open it for edit.

Schedule meeting from Global actions

RingCentral for Salesforce provides Global Actions for Scheduling and Starting a RingCentral Video meeting.

The Admin user will need to config the Global Action to the orgization.



Schedule RingCentral Video meeting

The schedule meeting page will show up. Edit and click Schedule to schedule a meeting.

Schedule RingCentral Video meeting

Meeting title

Albert Wen's RingCentral Video meeting

Date

03/03/2022

Time

06:00 PM

Duration

01 hr

00 min

Name

Related To

Description

Schedule

Schedule RingCentral Video meeting

Albert Wen's RingCentral Video meeting

<https://v.ringcentral.com/join/904627474?pw=7e2da...>

Date /Time

03/03/2022, 6:00 PM, 1 hr

Meeting ID

904627474

Meeting password

gS8w8c3AUT

Copy meeting Info

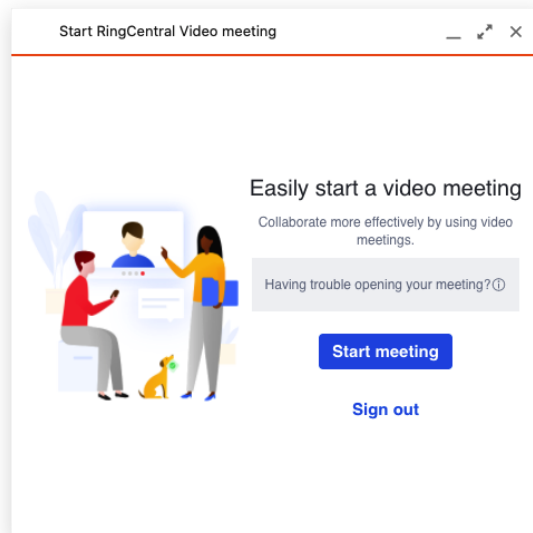
View meeting details

Sign out



Start RingCentral Video meeting

The RingCentral for Salesforce will initiate a RingCentral Video meeting. If for some reason (for example, browser block) the video window is not popping out, users can click the Start meeting button to re-initiate the meeting.

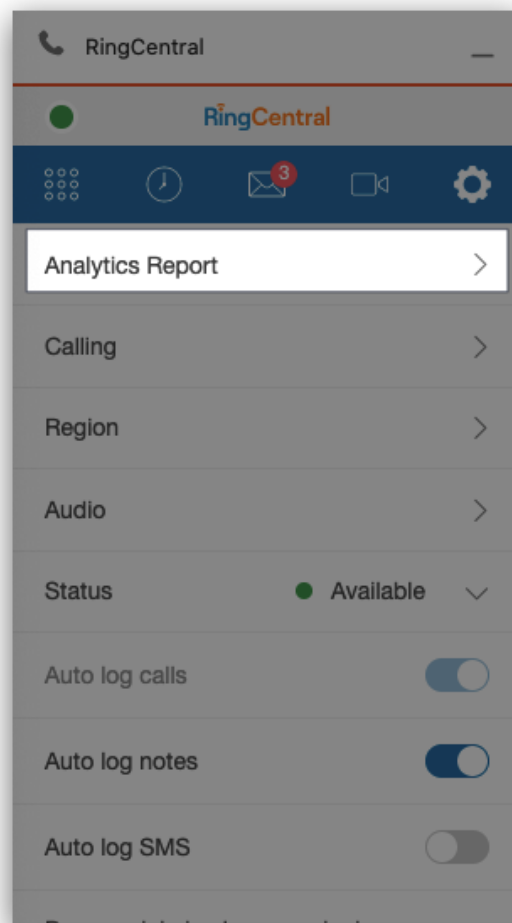


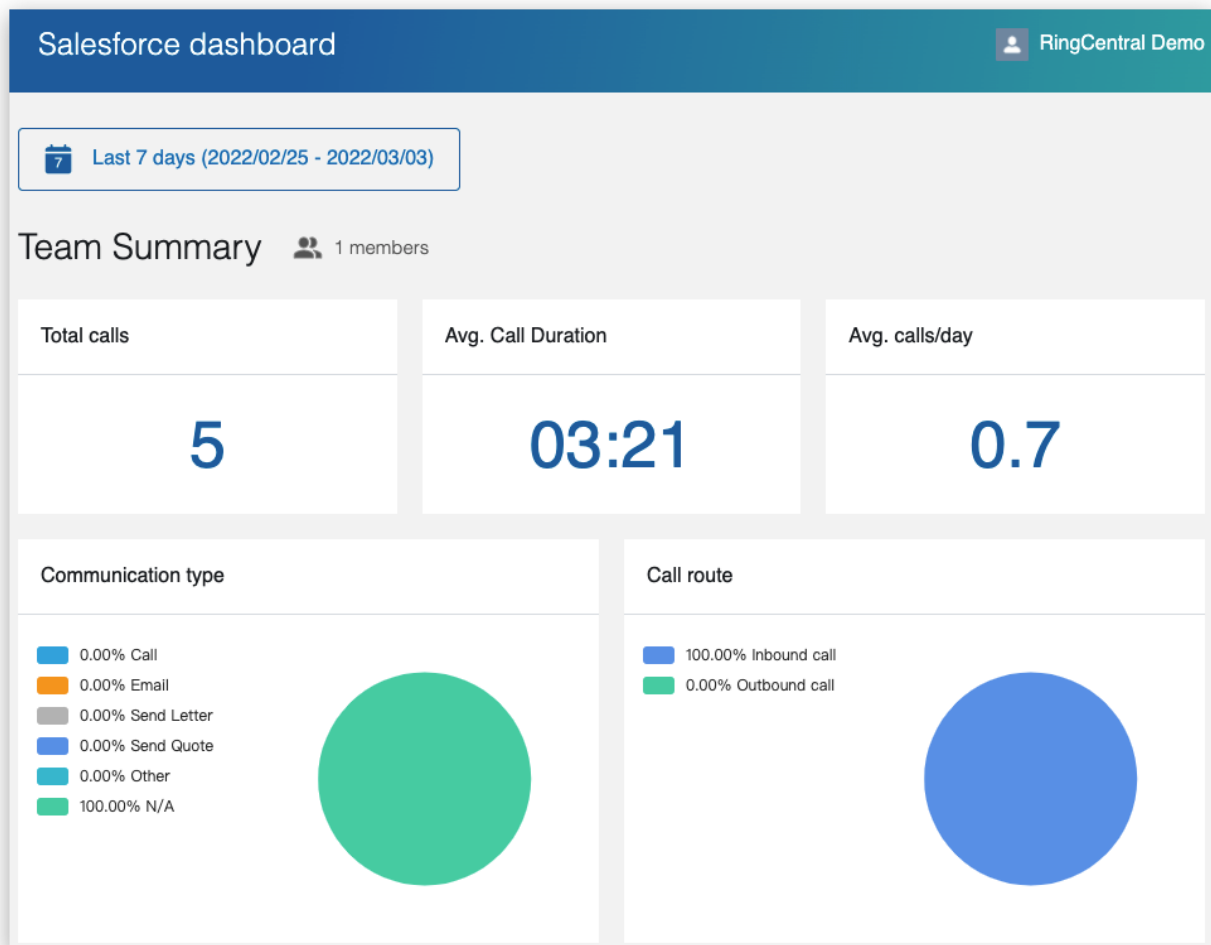
Reports and Analytics

Analytics Report

RingCentral for Salesforce provides Analytics Reporting so that users can have a view of their own phone data.

The supervisor of a group in Salesforce organization can have a view of the whole team.



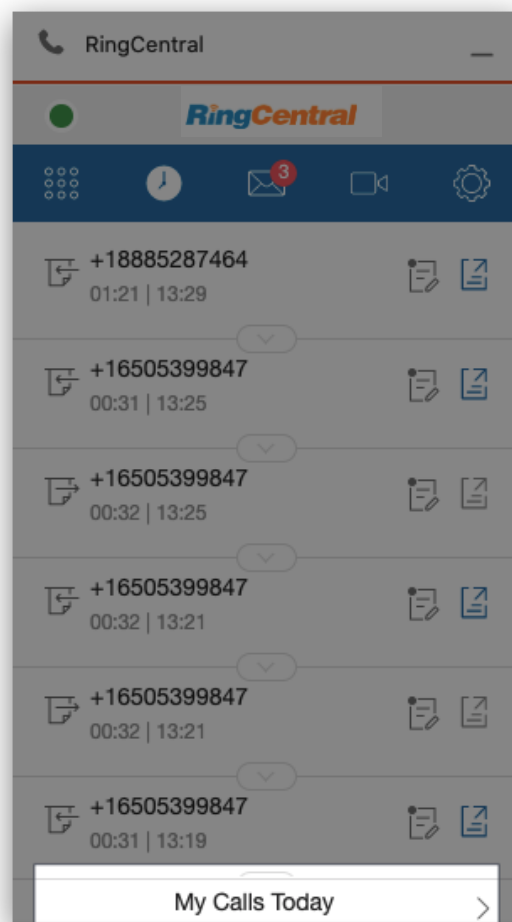
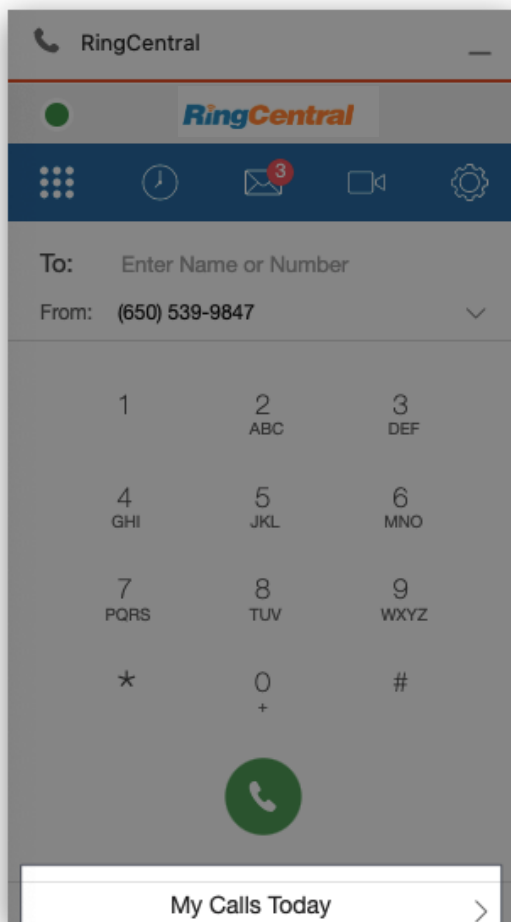




Salesforce Reports

RingCentral for Salesforce also provides Salesforce reports, including My Calls Today and My SMS Today.

The user can access the My Calls Today report from the dialer page and the Call history page.



Salesforce Dashboard

RingCentral for Salesforce also builds a basic Salesforce dashboard. The user who has the proper Salesforce permissions can find the dashboard on the Dashboard list.

