RingCentral for Zendesk

Administrator Guide

zendesk

RingCentral

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Introduction

About RingCentral for Zendesk

RingCentral for Zendesk provides seamless integration between the Zendesk application and your RingCentral services to enable improved customer retention, greater agent productivity, and advanced business processes.

It offers these features:

Complete cloud-based app cloud integration

- Use your browser on any platform (Windows®, Mac®); no software installation is needed.
- Make or receive calls through the RingCentral phone system, directly from your account within Zendesk.

Increased call efficiency

- With simple click-to-dial from within Zendesk, you can spend more time servicing clients and less time dialing.
- Save time by eliminating misdials.

Enhanced streamline of your customer interaction

- Incoming callers are instantly matched to existing client records, which are automatically displayed.
- Tickets are created automatically when a call arrives.

About this Guide

This guide is specifically designed for administrators of RingCentral for Zendesk. This guide is not intended for Zendesk 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 Zendesk instance to enable users of RingCentral for Zendesk .

About Zendesk

Zendesk is customer service software based in the cloud. It features a simple interface that will feel familiar to users. To enhance the customer experience, Zendesk integrates other cloud based services such as Salesforce, Facebook and Twitter.

Zendesk includes ticketing, self-service options, and the most-needed customer support features.

Zendesk streamlines customer support with time-saving tools such as ticket views, triggers, and automations. This helps you get straight to what matters most—better customer service and more meaningful conversations.

Setting Up RingCentral for Zendesk

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To set up RingCentral for Zendesk:

1. Sign in as an administrator to your RingCentralfor Zendesk and click the **Admin** icon in the navigation bar. (Figure 1)
2. Under Apps, select Marketplace, and search for **RingCentral.** (Figure 2, next page)
3. On the Marketplace page, click **on Free** and then select the account you would like to install the app in**, and click Install**. (Figure 3, next page)
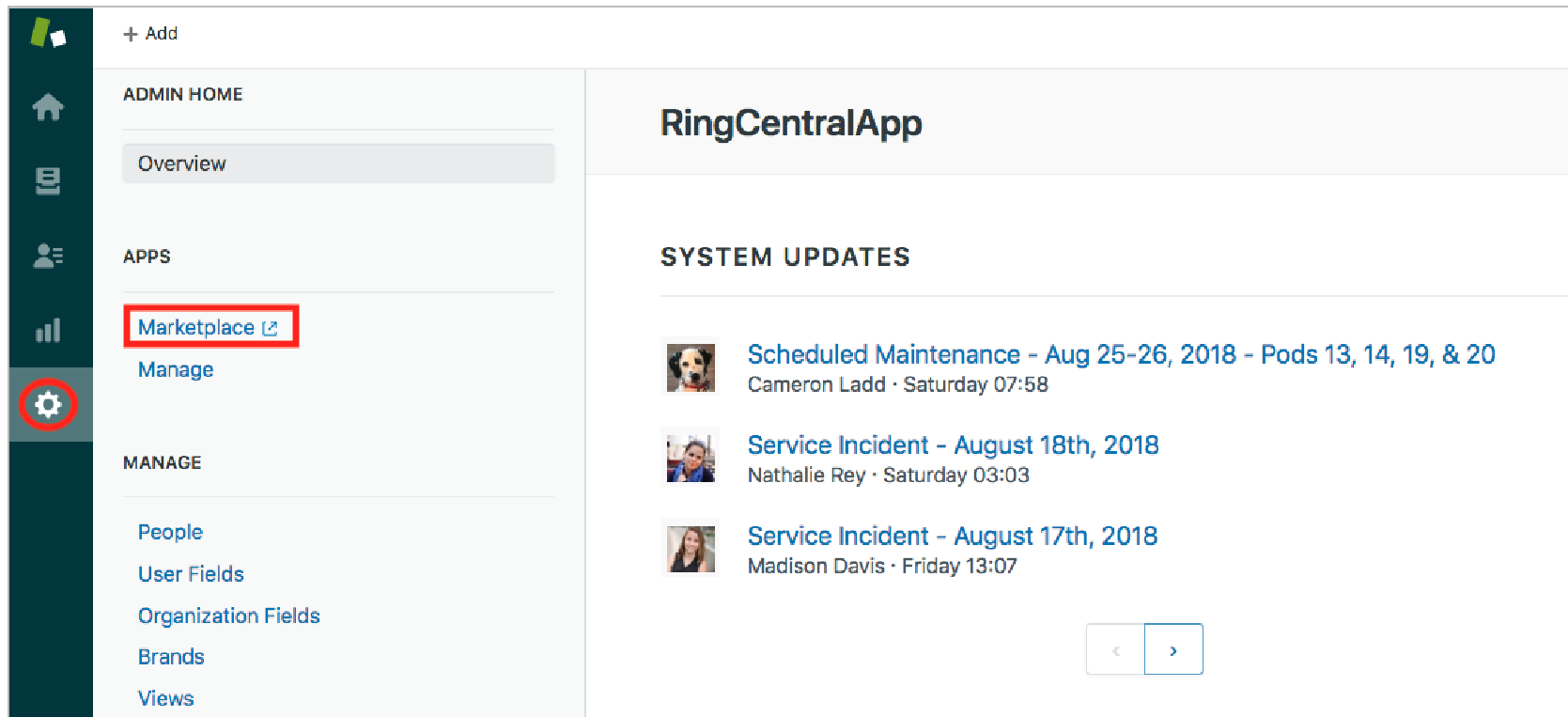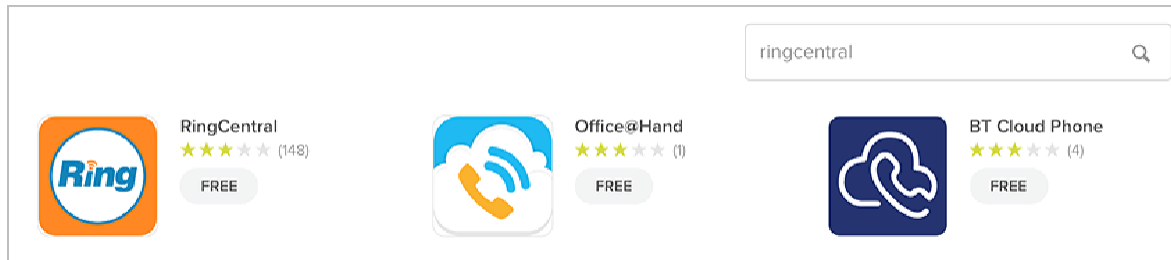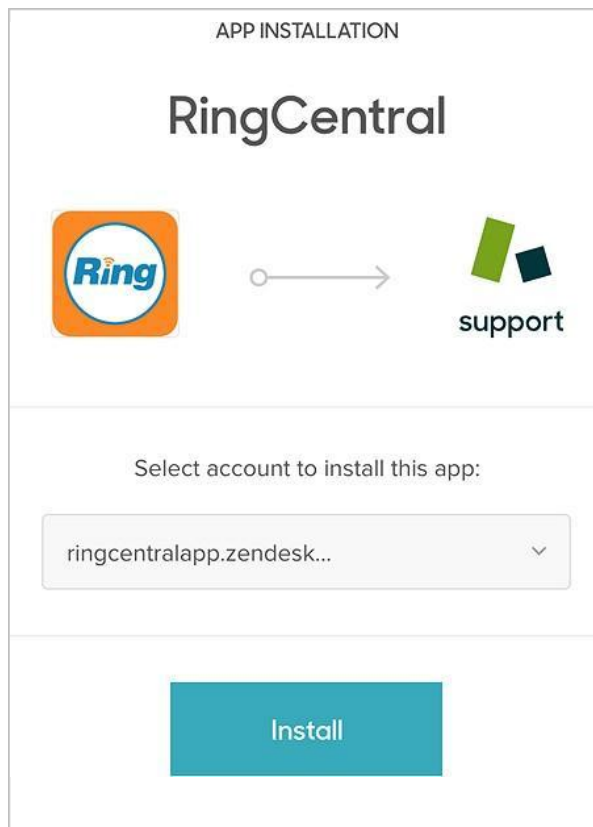
Figure 1

Figure 2

Figure 3

4. Clicking **Install** will take you back to the Admin page where you can fill in installation details**.** (Figure 3 above)

5. Click **Install** to install the RingCentral app to your Zendesk account. (Figure 4)
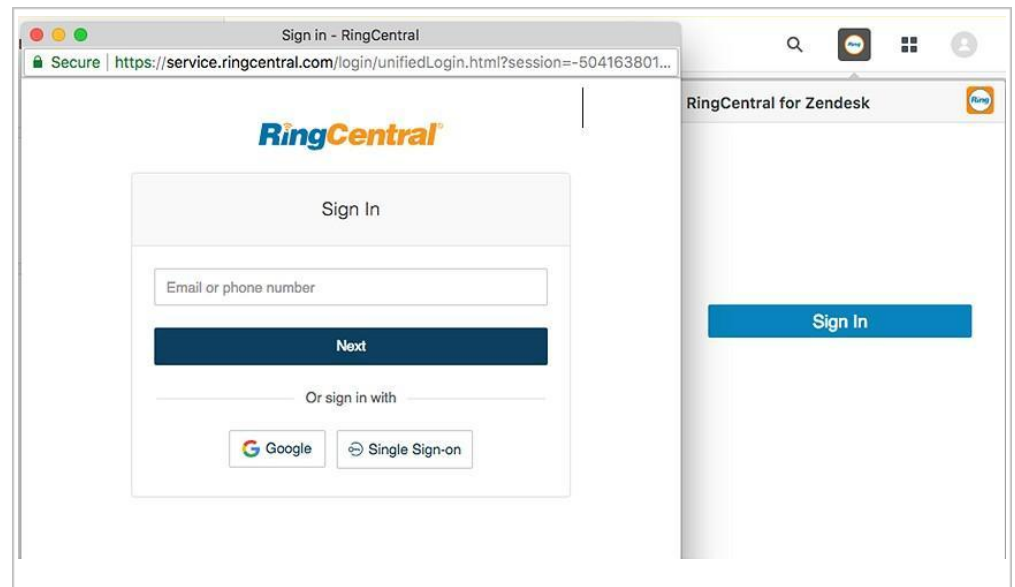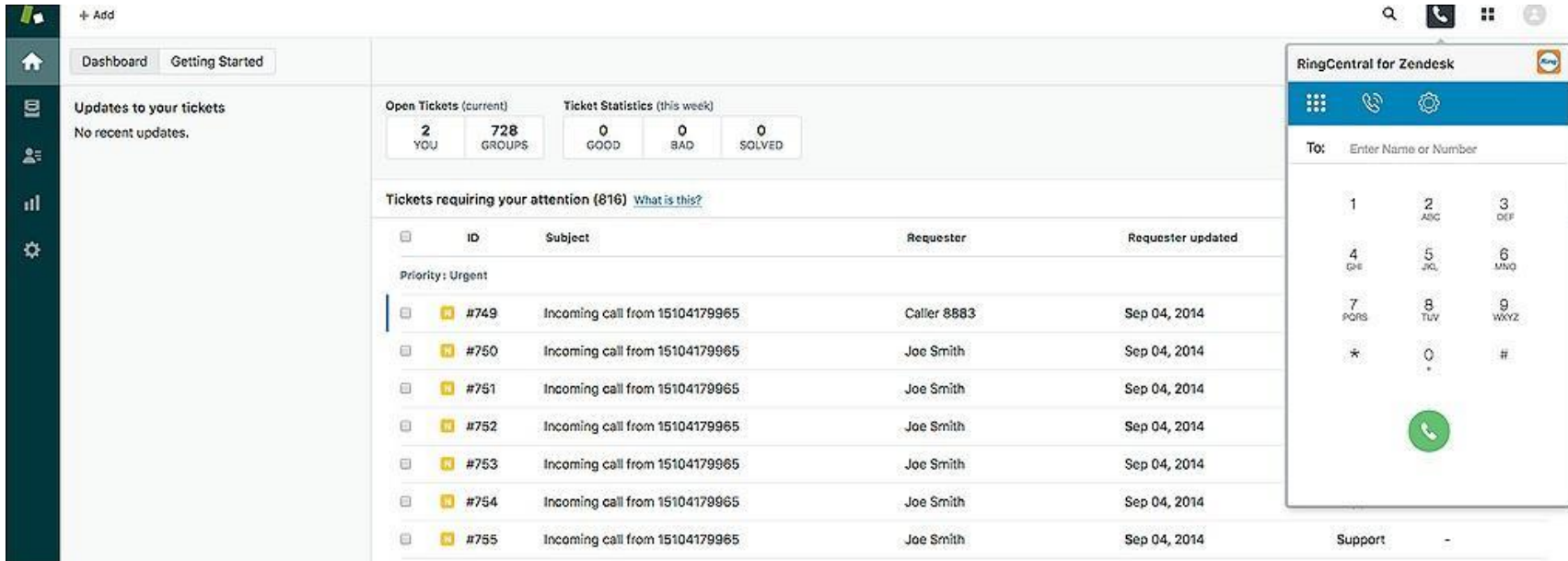
Figure 4

Figure 5

6. Refresh your Zendesk login session. The RingCentral app icon shows at the top right hand corner, provided you did not disable the app for your own profile in the previous steps. Click the RingCentral app icon; the RingCentral login screen launches within your Zendesk frame. Enter your RingCentral login credentials and click **Sign In**. (Figure 5 above)

7. You can now use RingCentral for Zendesk to make and receive calls. (Figure 6)

Figure 6

Create Ticket Starting with Private Note

A new Zendesk ticket is created by the RingCentral app right after a Zendesk agent accepts a call from a customer. Typically, support organizations want the first comment entered by Zendesk Agents on these tickets to be set to private automatically.

You can set this feature within Zendesk:

1. Sign in as an administrator to your RingCentral for Zendesk and click the Admin icon in the navigation bar.
2. Select Tickets under **SETTINGS**.
3. Uncheck **Agent comments via web are public by default.** (Figure 7)
4. Please logout and log back in to make the changes be effective.

Creating Tickets from Voicemails, Missed Calls, Faxes or Text Messages

It is possible to create Zendesk tickets for all the voicemail messages, missed calls, texts or faxes that you get on your RingCentralphone. This section describes how to enable this feature.

Log into your RingCentral account at http://service.ringcentral.com by entering your RingCentral phone number and password. Now go under **Settings** and drop down "Messages & Notifications"; click **Edit** under **Settings**. (Figure 8)
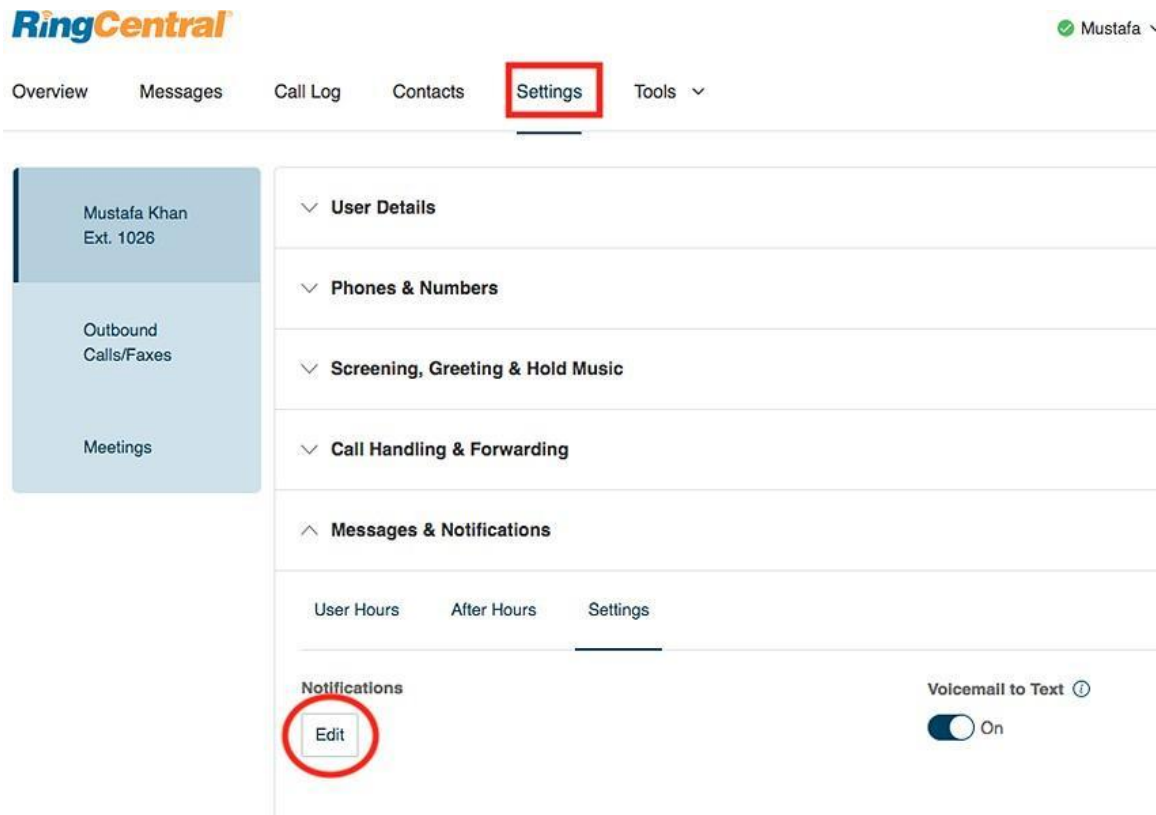

Figure 8

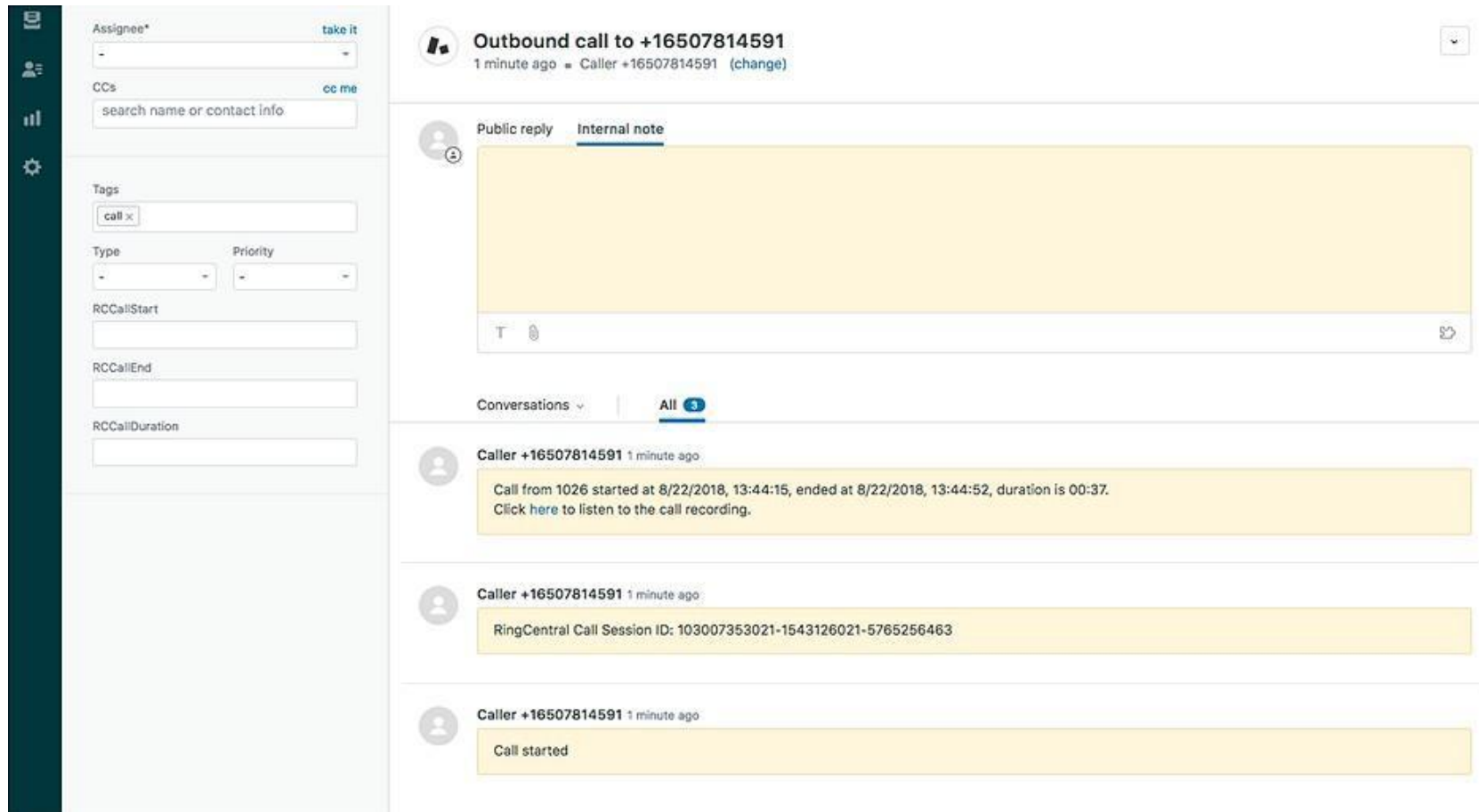Upon Clicking **Edit**, it will pop up another window that shows Notifications settings.

Figure 9

Select all the applicable checkboxes for the features that you want to create tickets for. Enter your Zendesk support email address. It should be something like support@yourcompanyname.zendesk.com.

When a caller leaves a voicemail on your RingCentral phone, an email is sent to the address specified in the settings above.

After Zendesk receives this email, it converts this email in to a Zendesk Ticket for you. Similar tickets will be created for missed calls, faxes, call recordings or text messages if you have enabled notifications for those items.

Once you log into Zendesk you will see these new tickets assigned to the group the email is associated with. If the ticket was created with a voicemail, the newly created Zendesk ticket will contain a recording of the voicemail with which you can listen to the message the caller has left.

Figure 10

Call Data

Zendesk administrators can add this feature that can be used to add call start time, end time and call duration on every ticket that are created via RingCentral for Zendesk. Although this feature is optional but with a very small effort the data collected by this feature can be used to develop very powerful reports for your company.

Go to the Admin console and find Ticket Fields under Manage. Now on top right side corner, click on Add Field to add a custom field link. (Figure 11)
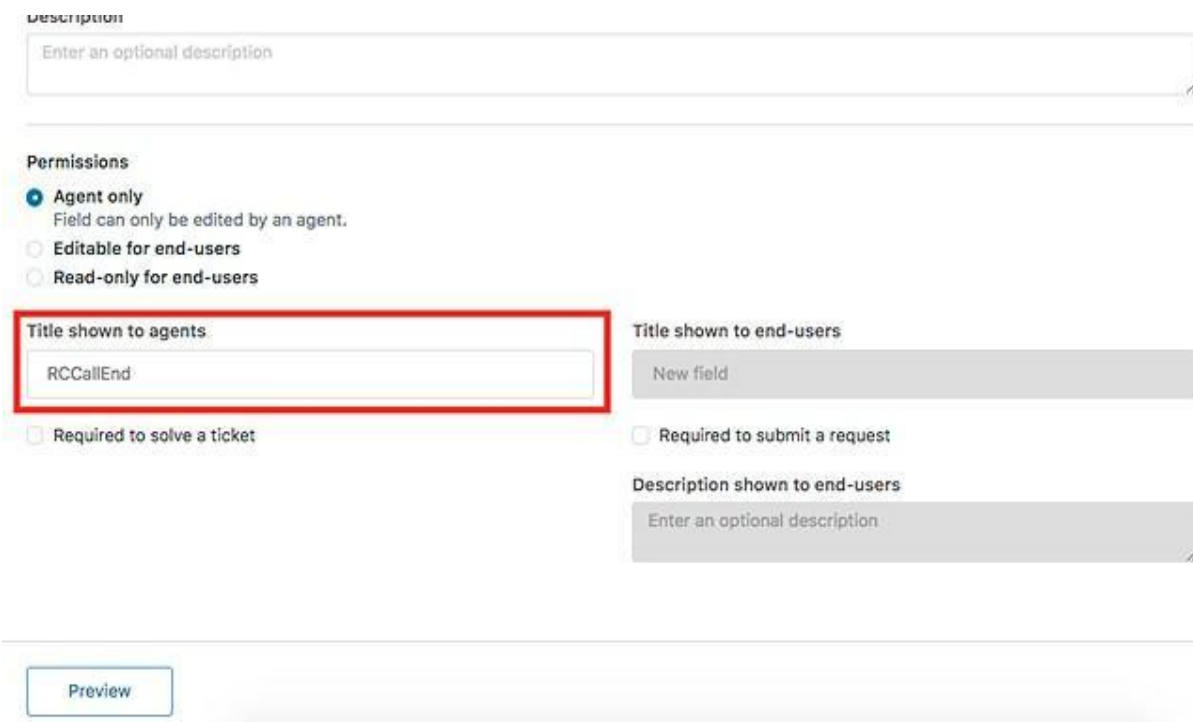

Figure 11

Select a Text and enter a new text field for RCCallStart in the screen below and click **Save**. Do not mark any of these fields as required. (Figure 12)

Figure 12

Add another Text field with name of RCCallEnd and click **Save**. Do not mark any of these fields as required. (Figure 13)
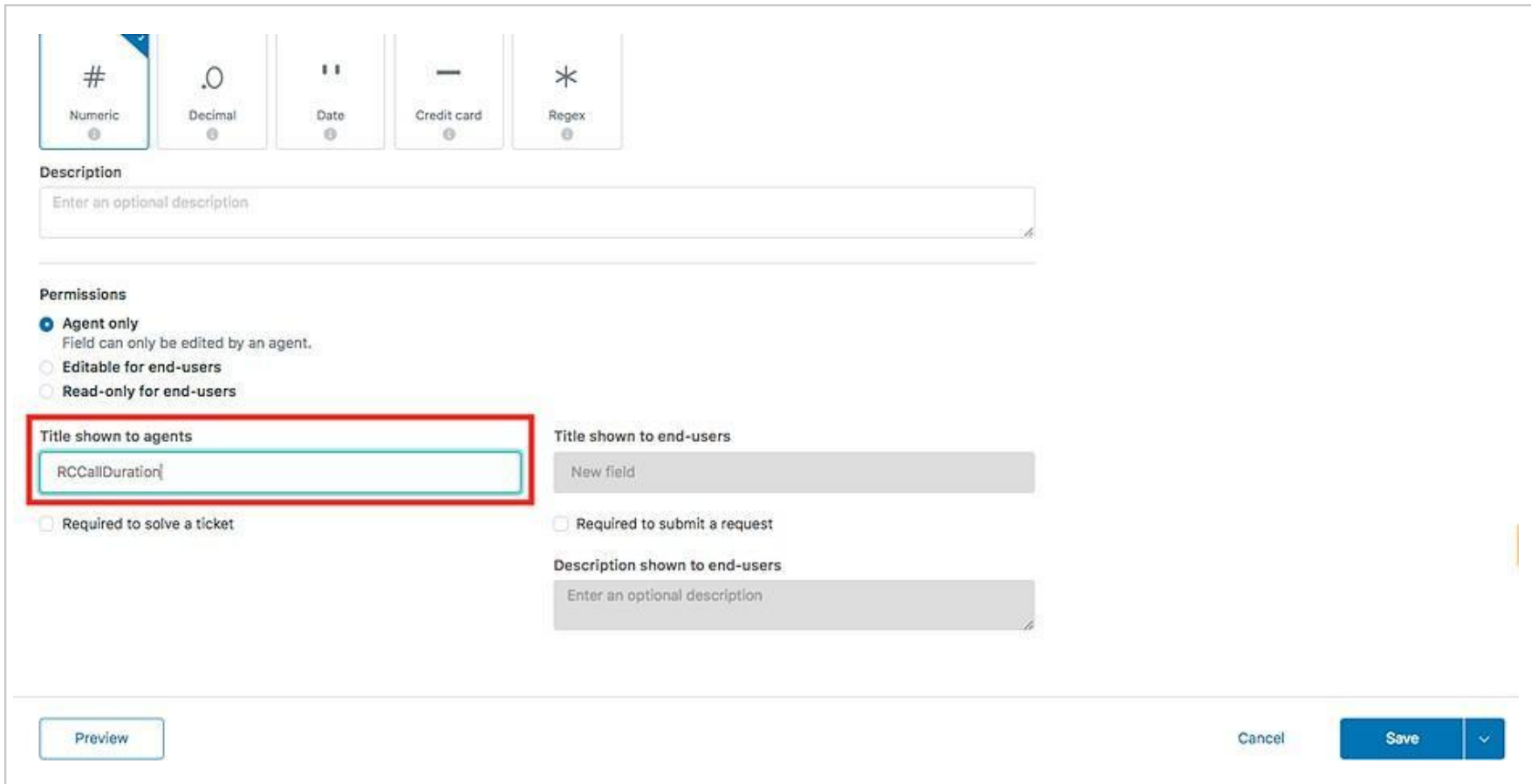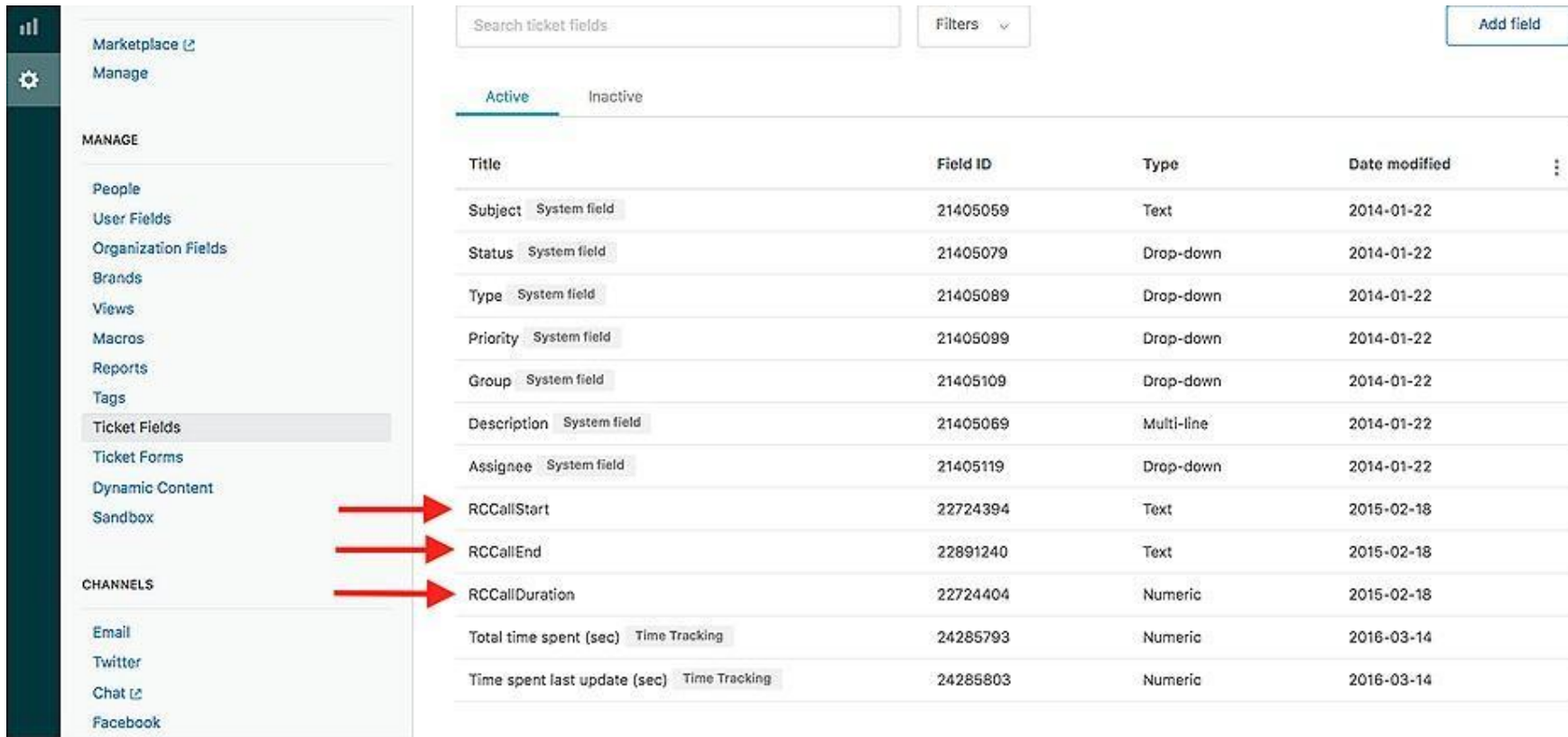
Figure 13

Now choose Numeric from the field section and finally add a numeric field RCCallDuration and click **Save**. Do not mark any of these fields as required. (Figure 14)

Figure 14

Once the fields are created you should see them on Zendesk Ticket fields screen as custom fields. (Figure 15)

<div align="center">Figure 15</div>

Troubleshooting

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

A: You cannot remove individual users from RingCentral for Zendesk; you can change the application settings to remove user profiles.

Q: Which browsers are supported?

A: The following browsers are supported by RingCentral for Zendesk:

- Internet Explorer 11 and higher (Windows XP, 7, 8 or higher)
- Firefox 37 and higher (Windows, Mac)
- Chrome 41 and higher (Windows, Mac)
- Safari 8 and higher (Mac)

Q: On logging into the RingCentral for Zendesk, users are getting this error message: "Your RingCentral edition does not support Zendesk 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 the Zendesk integration. You may have to upgrade your account to be able to use this feature. Please contact your RingCentral representative for more information.