

# RingCentral for Zendesk

## Administrator Guide



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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

# Setting up RingCentral for Zendesk

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)

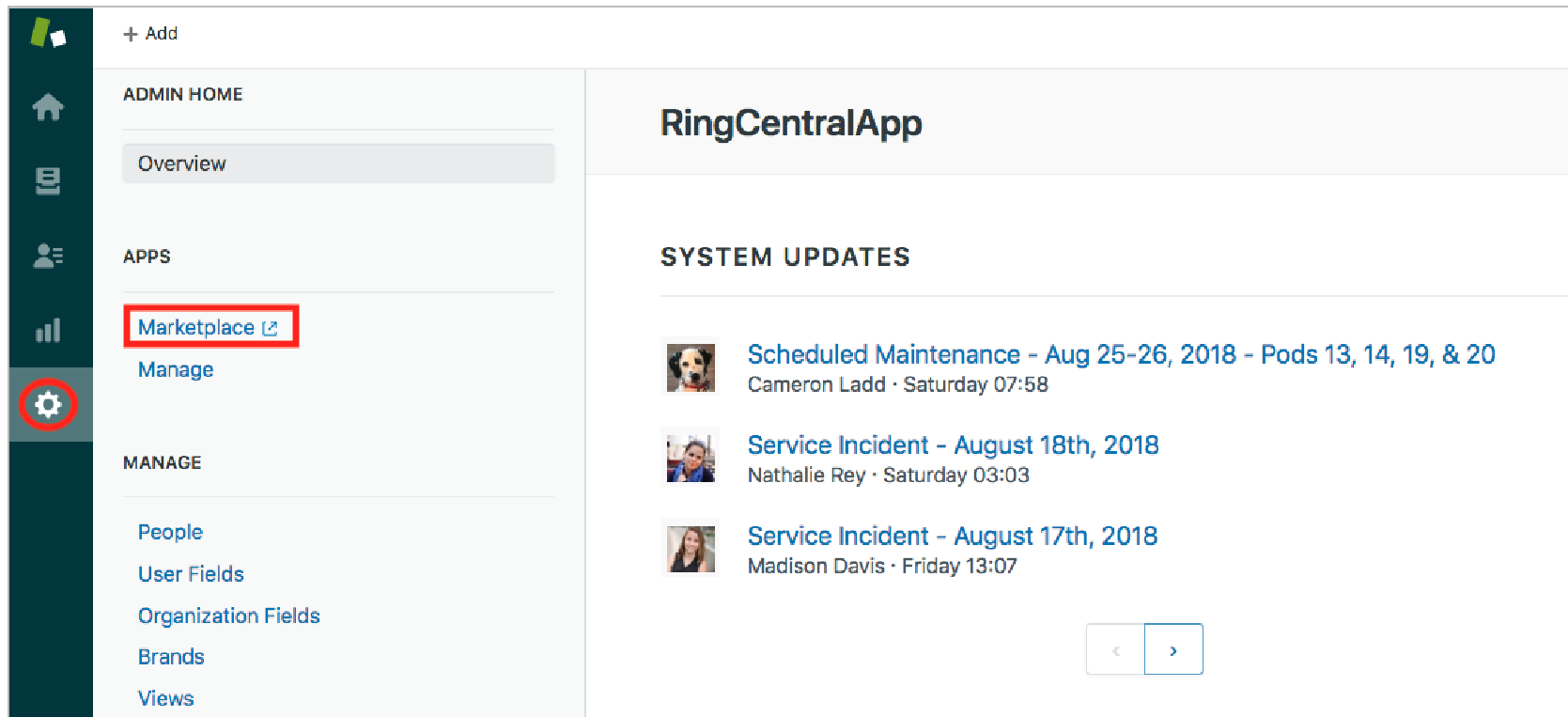


Figure 1

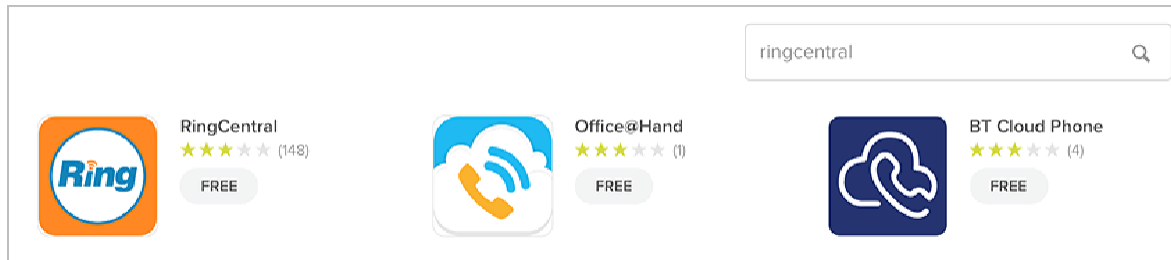


Figure 2

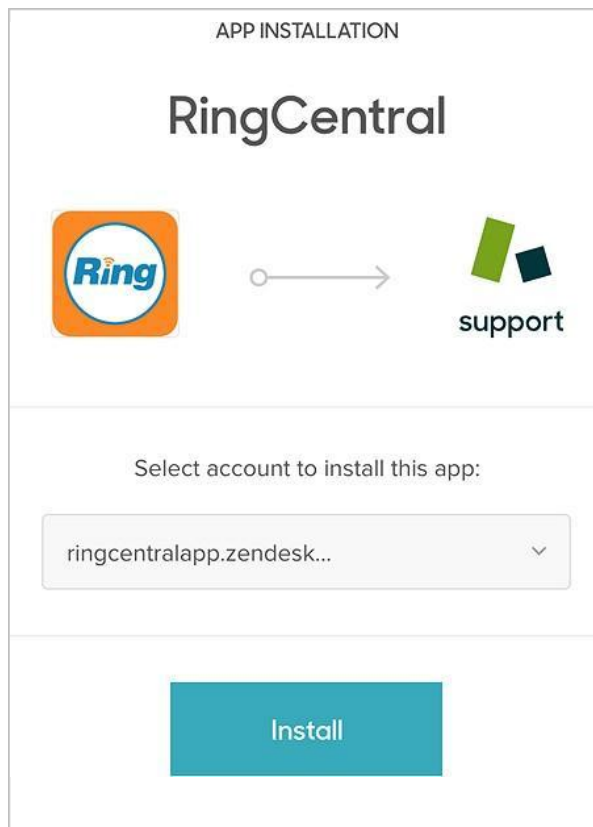


Figure 3

- Clicking **Install** will take you back to the Admin page where you can fill in installation details. (Figure 3 above)
- Click **Install** to install the RingCentral app to your Zendesk account. (Figure 4)

## Apps Marketplace



RingCentral For Zendesk  
Integration with RingCentral phone system

### INSTALLATION

Title\*

RingCentral For Zendesk

☐ Enable role restrictions?

Select the roles that should have access to this app:

☐ Enable group restrictions?

Select which groups should have access to this app:

By installing this app you hereby agree to the [Zendesk Marketplace Terms of Use](#).

Cancel

Install

Figure 4

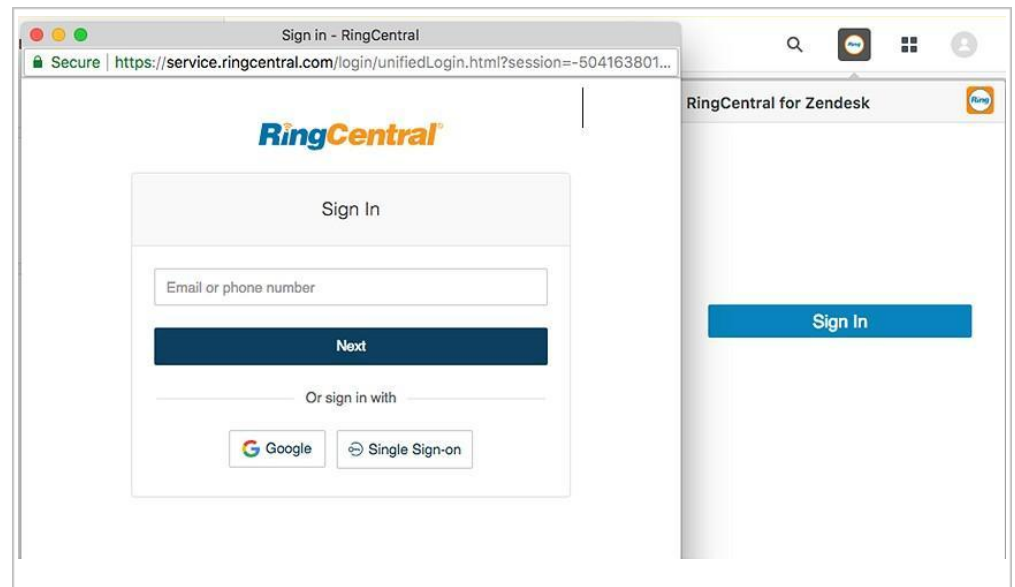
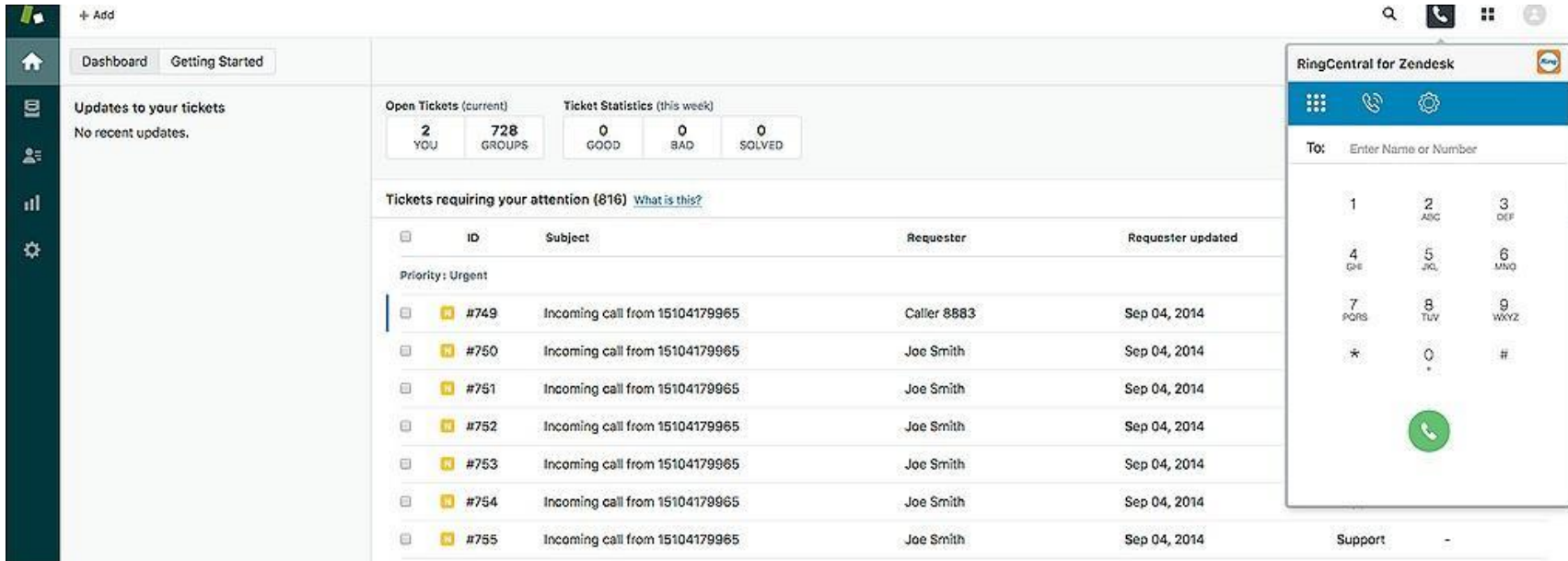


Figure 5



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)



The screenshot displays the RingCentral for Zendesk interface. On the left is a sidebar with navigation icons. The main area shows a dashboard with 'Open Tickets (current)' (2 YOU, 728 GROUPS) and 'Ticket Statistics (this week)' (0 GOOD, 0 BAD, 0 SOLVED). Below this is a table of 'Tickets requiring your attention (816)' with a priority filter set to 'Urgent'. The table lists several tickets, all with the subject 'Incoming call from 15104179965' and requester 'Joe Smith', dated 'Sep 04, 2014'. On the right, a RingCentral app window is open, showing a numeric keypad and a green call button.

ID	Subject	Requester	Requester updated
#749	Incoming call from 15104179965	Caller 8883	Sep 04, 2014
#750	Incoming call from 15104179965	Joe Smith	Sep 04, 2014
#751	Incoming call from 15104179965	Joe Smith	Sep 04, 2014
#752	Incoming call from 15104179965	Joe Smith	Sep 04, 2014
#753	Incoming call from 15104179965	Joe Smith	Sep 04, 2014
#754	Incoming call from 15104179965	Joe Smith	Sep 04, 2014
#755	Incoming call from 15104179965	Joe Smith	Sep 04, 2014

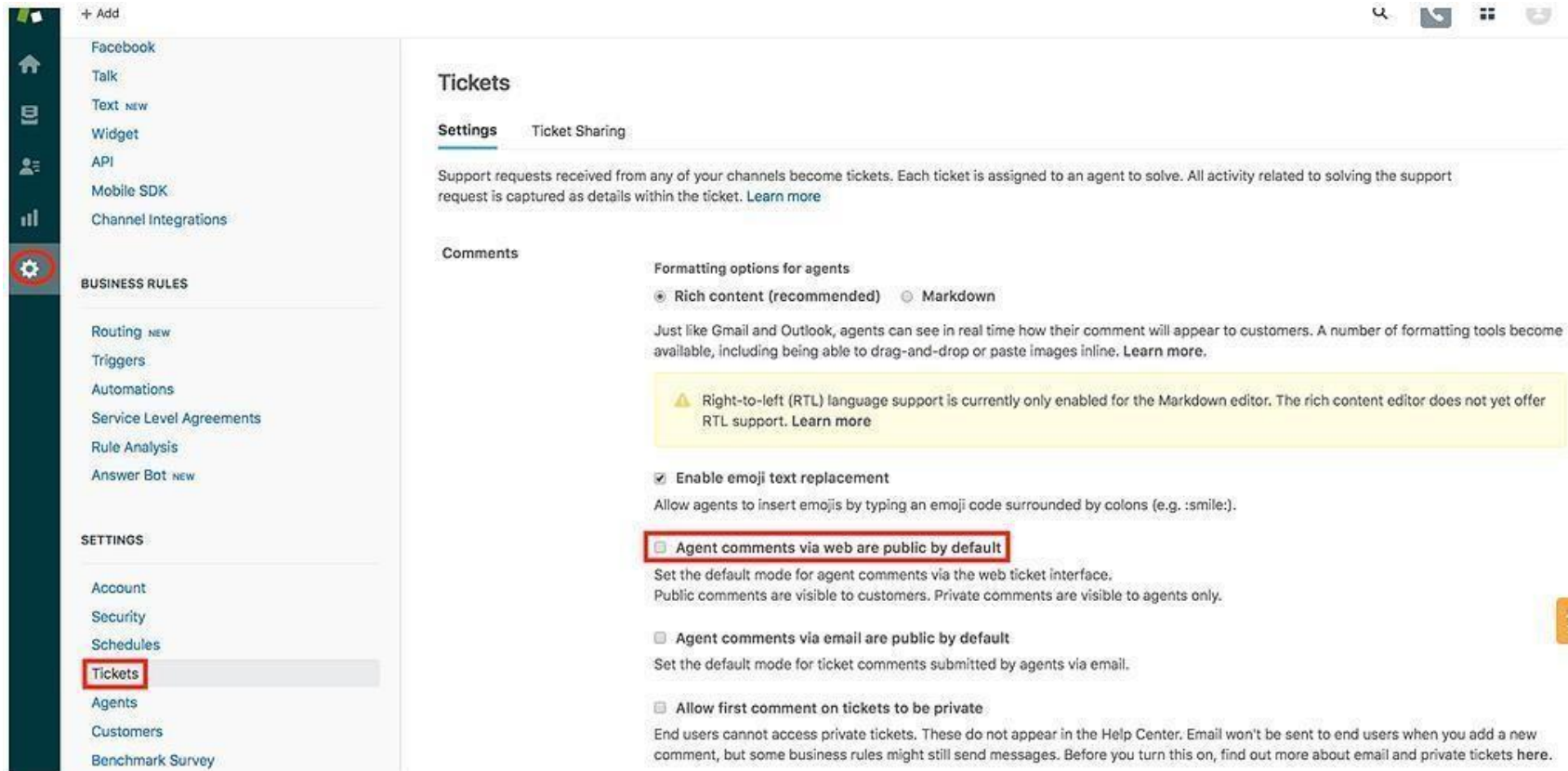
Figure 6

# 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.



The screenshot displays the Zendesk Admin Center interface. On the left, the 'Settings' menu is visible, with 'Tickets' highlighted. The main content area shows the 'Comments' section under the 'Tickets' heading. The 'Agent comments via web are public by default' checkbox is highlighted with a red box, indicating it should be unchecked. Other settings visible include 'Enable emoji text replacement', 'Agent comments via email are public by default', and 'Allow first comment on tickets to be private'.

**Tickets**

**Settings** Ticket Sharing

Support requests received from any of your channels become tickets. Each ticket is assigned to an agent to solve. All activity related to solving the support request is captured as details within the ticket. [Learn more](#)

**Comments**

Formatting options for agents

☒ Rich content (recommended) ☐ Markdown

Just like Gmail and Outlook, agents can see in real time how their comment will appear to customers. A number of formatting tools become available, including being able to drag-and-drop or paste images inline. [Learn more](#)

⚠ Right-to-left (RTL) language support is currently only enabled for the Markdown editor. The rich content editor does not yet offer RTL support. [Learn more](#)

☒ **Agent comments via web are public by default**

Set the default mode for agent comments via the web ticket interface. Public comments are visible to customers. Private comments are visible to agents only.

☐ Agent comments via email are public by default

Set the default mode for ticket comments submitted by agents via email.

☐ Allow first comment on tickets to be private

End users cannot access private tickets. These do not appear in the Help Center. Email won't be sent to end users when you add a new comment, but some business rules might still send messages. Before you turn this on, find out more about email and private tickets [here](#).

# 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)

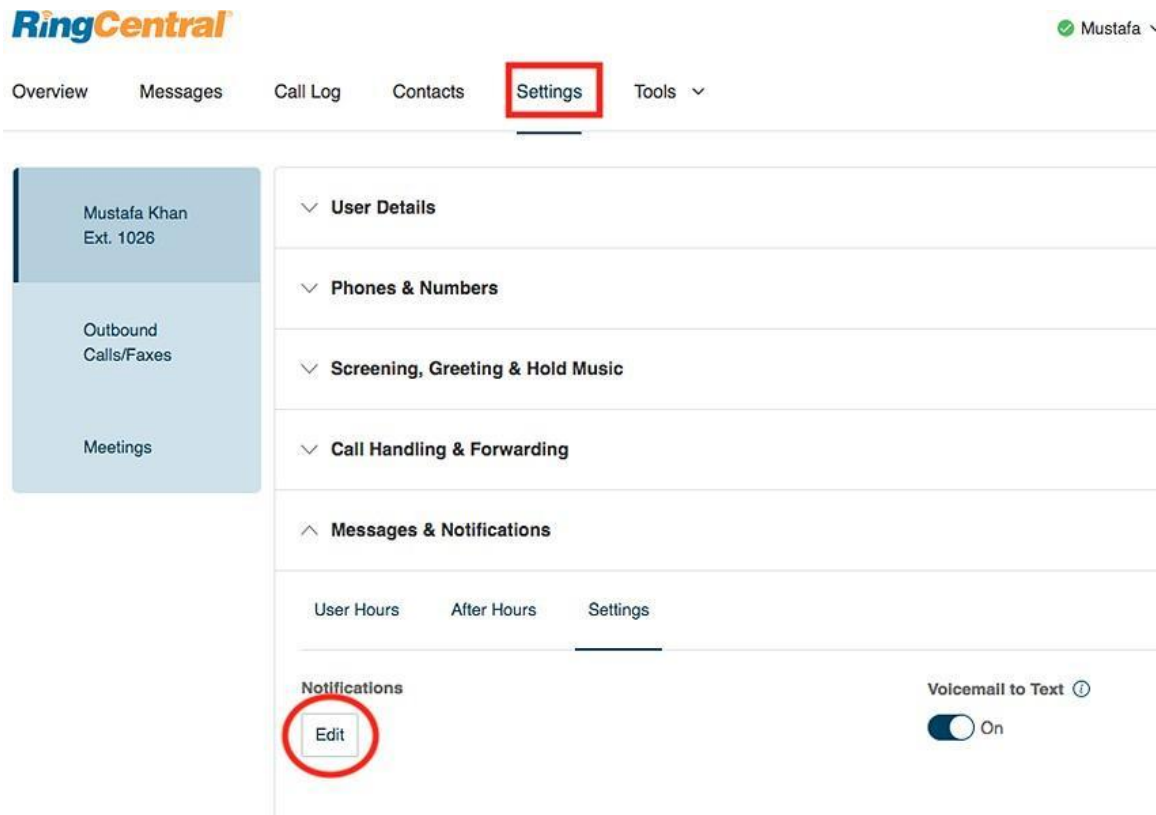


Figure 8

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

Notifications

×

Basic Settings

	By Email	By SMS
Voicemail Messages	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Received Faxes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Missed Calls	<input type="checkbox"/>	<input type="checkbox"/>
Fax Transmission Results	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Received Text Messages	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Send Notifications to

Email

mustafa.khan@ringcentral.com

Phone Number

Select Carrier

4085551212

+ Add

My carrier is not listed ⓘ

Cancel

Save

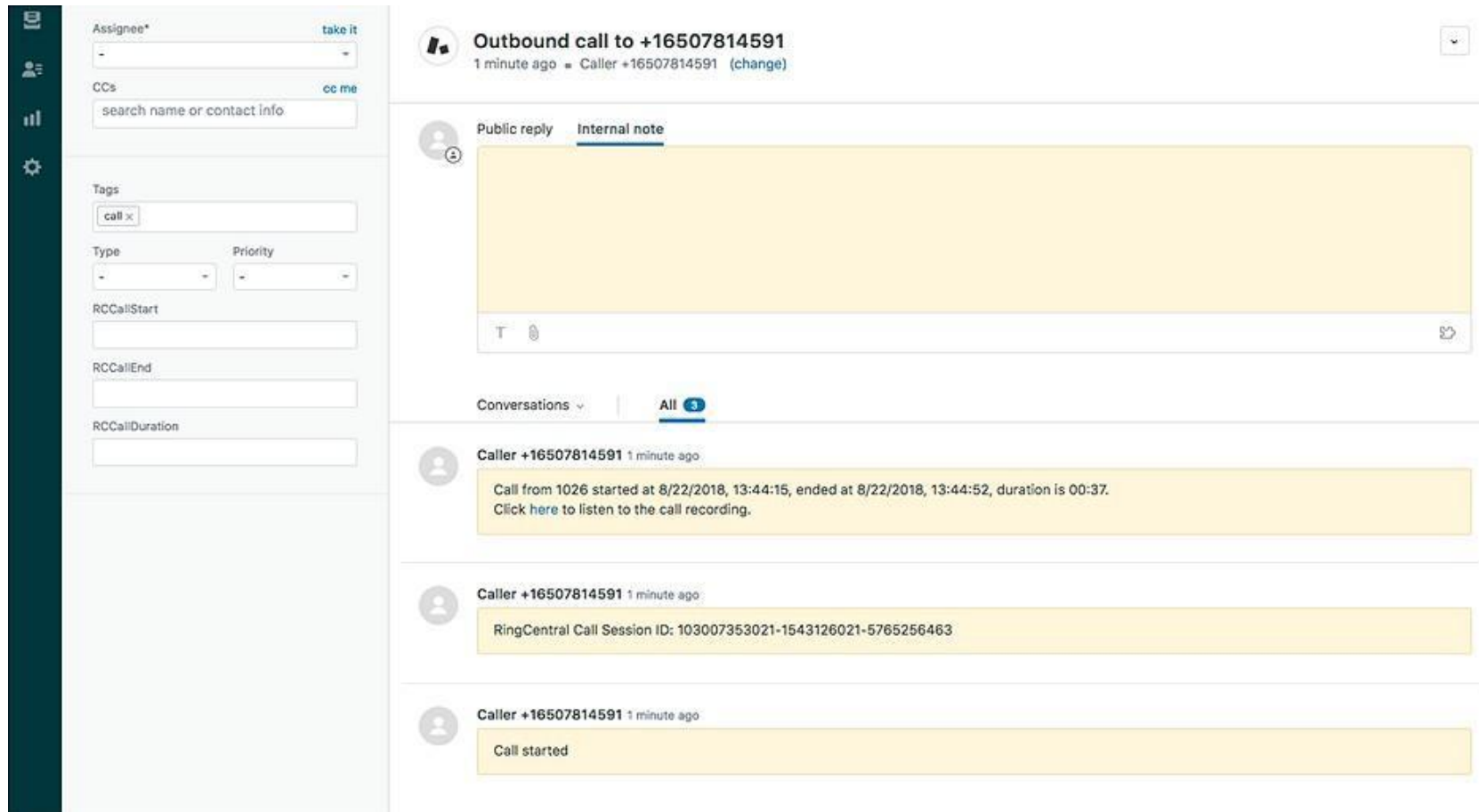
Figure 9

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.



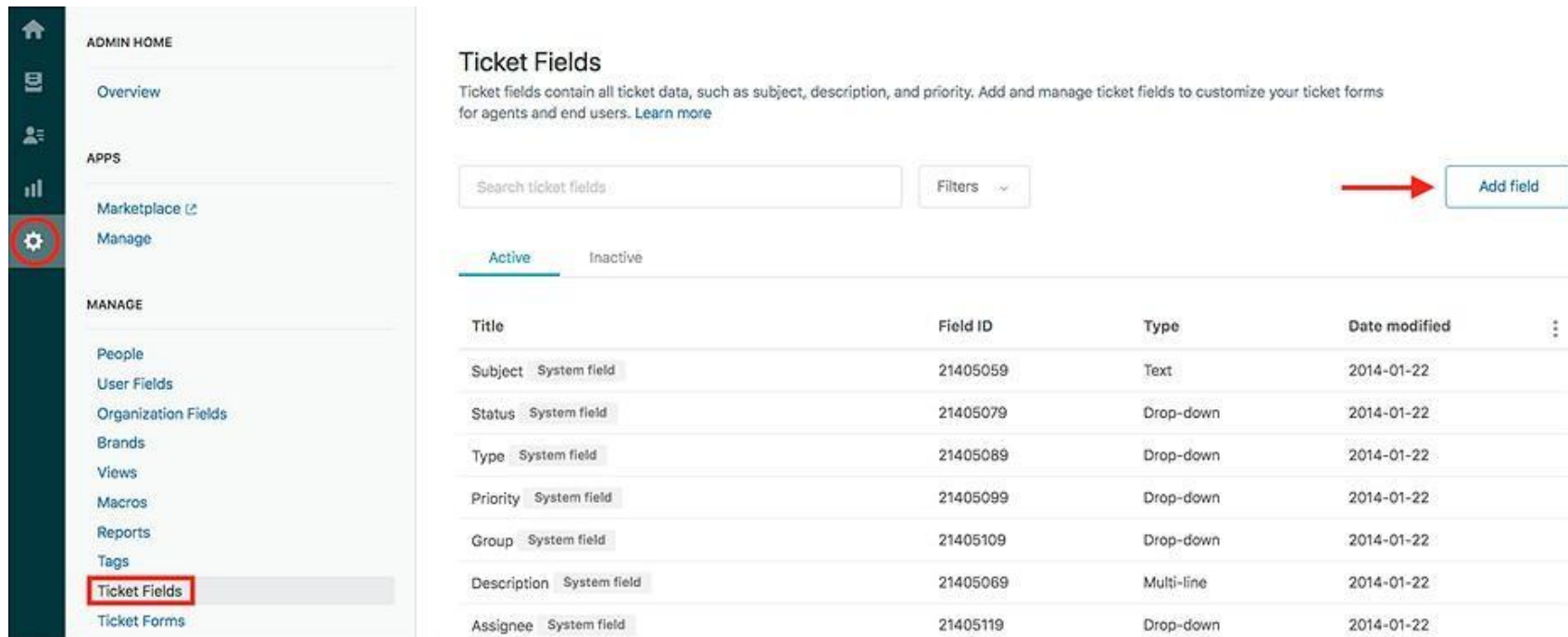
The screenshot displays a Zendesk ticket interface. On the left is a sidebar with navigation icons. The main content area shows a ticket titled "Outbound call to +16507814591" with a timestamp of "1 minute ago" and a link to "change" the caller information. Below the title, there are tabs for "Public reply" and "Internal note". A large yellow rectangular area is present under the "Internal note" tab. Below this, there is a section for "Conversations" with a dropdown menu set to "All" and a count of "3". The first conversation entry is from "Caller +16507814591" with a timestamp of "1 minute ago". The message content is: "Call from 1026 started at 8/22/2018, 13:44:15, ended at 8/22/2018, 13:44:52, duration is 00:37. Click [here](#) to listen to the call recording." The second conversation entry is also from "Caller +16507814591" with a timestamp of "1 minute ago" and the message: "RingCentral Call Session ID: 103007353021-1543126021-5765256463". The third conversation entry is from "Caller +16507814591" with a timestamp of "1 minute ago" and the message: "Call started".

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)



**ADMIN HOME**

- Overview

**APPS**

- Marketplace [↗](#)
- Manage

**MANAGE**

- People
- User Fields
- Organization Fields
- Brands
- Views
- Macros
- Reports
- Tags
- Ticket Fields**
- Ticket Forms

## Ticket Fields

Ticket fields contain all ticket data, such as subject, description, and priority. Add and manage ticket fields to customize your ticket forms for agents and end users. [Learn more](#)

Search ticket fields  Filters

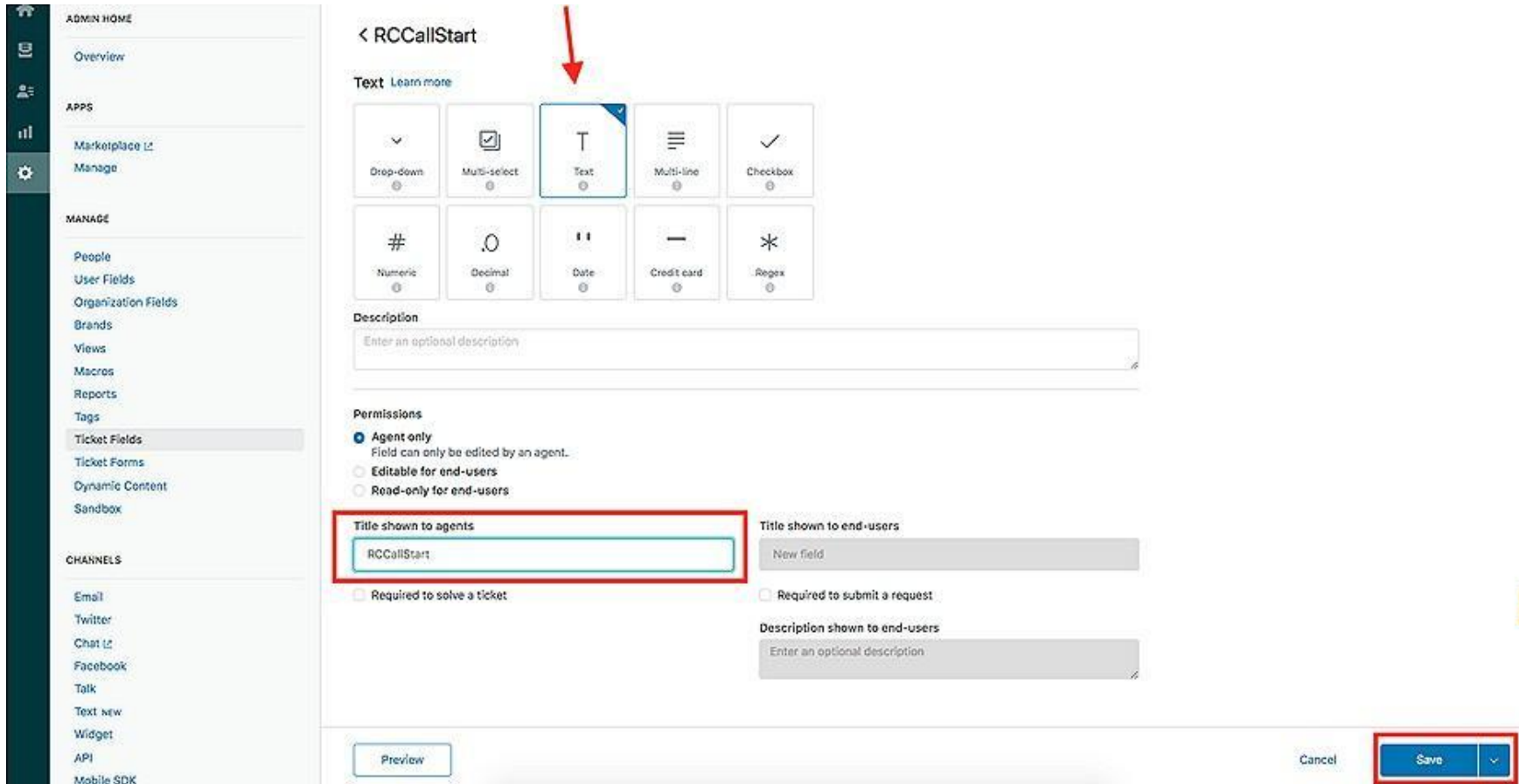
[Add field](#)

Active Inactive

Title	Field ID	Type	Date modified	
Subject System field	21405059	Text	2014-01-22	
Status System field	21405079	Drop-down	2014-01-22	
Type System field	21405089	Drop-down	2014-01-22	
Priority System field	21405099	Drop-down	2014-01-22	
Group System field	21405109	Drop-down	2014-01-22	
Description System field	21405069	Multi-line	2014-01-22	
Assignee System field	21405119	Drop-down	2014-01-22	

Figure 11

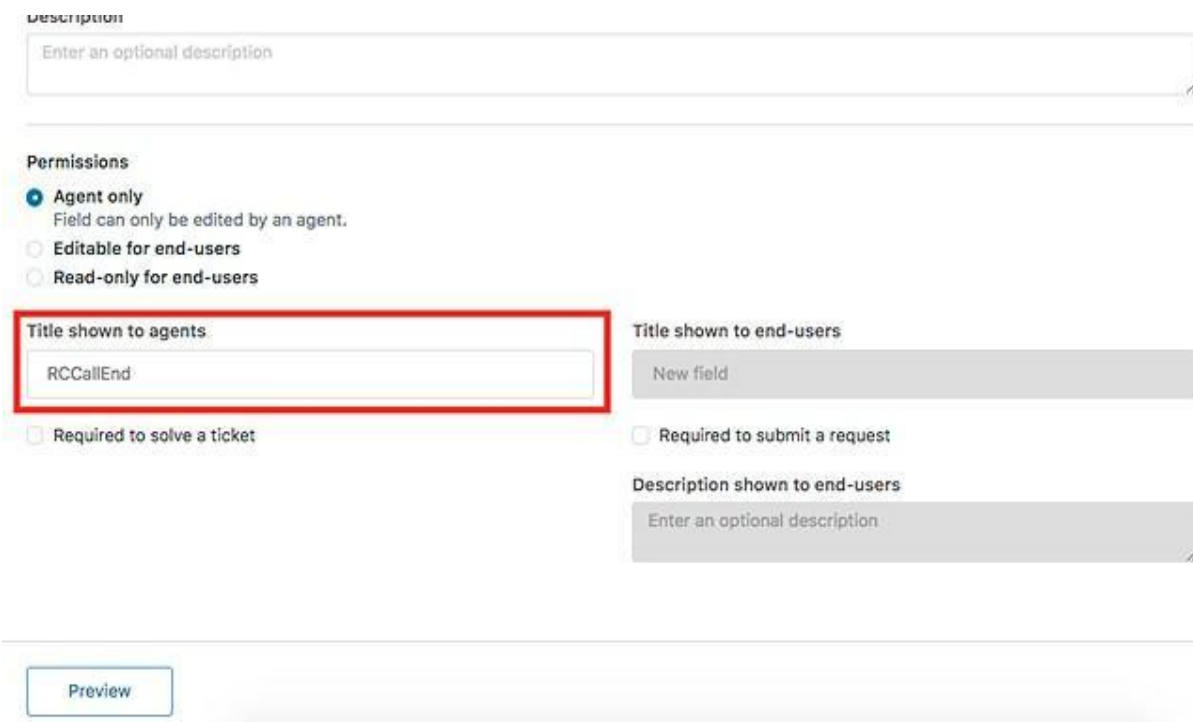
Select a Text and enter a new text field for RCCallStart in the screen below and click **Save**. Do not mark any of these fields as required. (Figure 12)



The screenshot displays the RingCentral Admin interface for configuring a new field. The left sidebar shows the navigation menu with categories: ADMIN HOME, APPS, MANAGE, and CHANNELS. The 'MANAGE' section is expanded, showing 'Ticket Fields' as the selected option. The main content area is titled '< RCCallStart'. A red arrow points to the 'Text' field type icon in the 'Text' section. Below the field type selection, there is a 'Description' field with the placeholder text 'Enter an optional description'. The 'Permissions' section has three radio buttons: 'Agent only' (selected), 'Editable for end-users', and 'Read-only for end-users'. The 'Title shown to agents' field is highlighted with a red box and contains the text 'RCCallStart'. The 'Title shown to end-users' field is labeled 'New field'. The 'Description shown to end-users' field has the placeholder text 'Enter an optional description'. At the bottom, there are 'Preview', 'Cancel', and 'Save' buttons. The 'Save' button is highlighted with a red box.

Figure 12

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



**Description**

Enter an optional description

---

**Permissions**

☒ **Agent only**  
Field can only be edited by an agent.

☐ Editable for end-users

☐ Read-only for end-users

**Title shown to agents**

RCCallEnd

☐ Required to solve a ticket

**Title shown to end-users**

New field

☐ Required to submit a request

**Description shown to end-users**

Enter an optional description

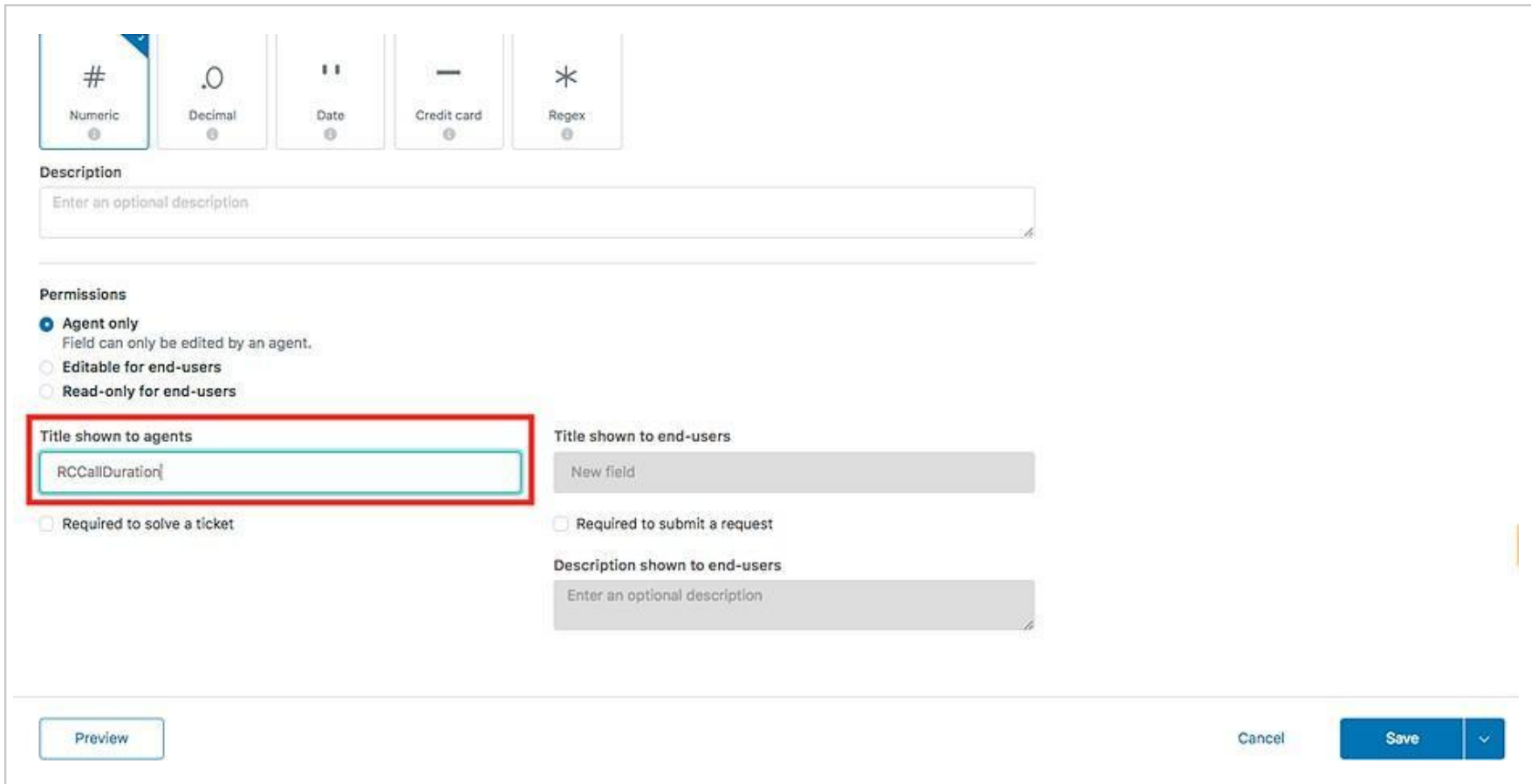
---

[Preview](#) [Cancel](#) [Save](#) [v](#)

Figure 13



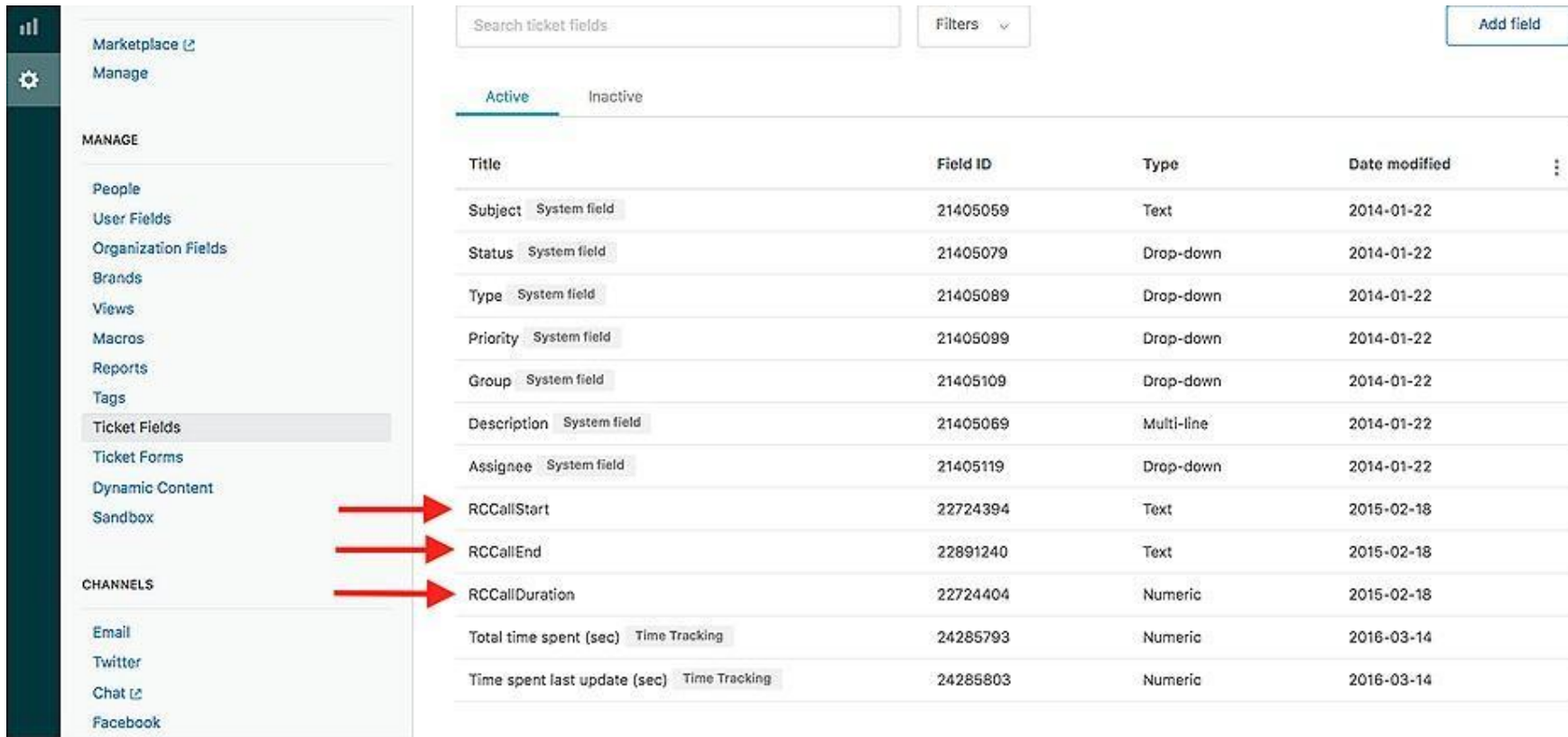
Now choose Numeric from the field section and finally add a numeric field RCCallDuration and click **Save**. Do not mark any of these fields as required. (Figure 14)



The screenshot displays the configuration interface for a new field in RingCentral. At the top, five field type options are shown: Numeric (selected), Decimal, Date, Credit card, and Regex. Below these, a 'Description' field is present with the placeholder text 'Enter an optional description'. The 'Permissions' section includes three radio buttons: 'Agent only' (selected), 'Editable for end-users', and 'Read-only for end-users'. The 'Title shown to agents' field is highlighted with a red border and contains the text 'RCCallDuration'. The 'Title shown to end-users' field contains the text 'New field'. The 'Description shown to end-users' field contains the text 'Enter an optional description'. At the bottom, there are three buttons: 'Preview', 'Cancel', and 'Save'.

Figure 14

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



Search ticket fields Filters Add field

Active Inactive

Title	Field ID	Type	Date modified
Subject System field	21405059	Text	2014-01-22
Status System field	21405079	Drop-down	2014-01-22
Type System field	21405089	Drop-down	2014-01-22
Priority System field	21405099	Drop-down	2014-01-22
Group System field	21405109	Drop-down	2014-01-22
Description System field	21405069	Multi-line	2014-01-22
Assignee System field	21405119	Drop-down	2014-01-22
RCCallStart	22724394	Text	2015-02-18
RCCallEnd	22891240	Text	2015-02-18
RCCallDuration	22724404	Numeric	2015-02-18
Total time spent (sec) Time Tracking	24285793	Numeric	2016-03-14
Time spent last update (sec) Time Tracking	24285803	Numeric	2016-03-14

Figure 15

## 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.