

RingCentral for Zendesk

User Guide

For v2.0 and Later



CONTEXT

Introduction	2
About RingCentral for Zendesk v2.0 and later	2
Requirements	2
Key Features	2
About this Guide	2
Before Getting Started	3
Preparation	3
Reference Resource	3
How it looks once RingCentral for Zendesk has been enabled:	3
Login	4
Overview	5
Main Pages	5
Settings Overview	6
Dialer and Call	7
Before Calling	7
Ways to Place a Call within Zendesk	8
Tickets and Calls	9
Manually Create Tickets	9
Auto Create Tickets	10
Call History	11
FAQ	12

Introduction

About RingCentral for Zendesk v2.0 and later

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

Requirements

Software

- Zendesk Support
- RingCentral for Zendesk
- RingCentral Desktop phone
- Browser
 - Google Chrome (Recommended, version 30 or later)
 - Firefox (version 25 or later)
 - Safari (Version 6.0.5 or later)

Permission

- To install RingCentral for Zendesk, the Zendesk admin's permission is required.
- To install RingCentral for Zendesk, Zendesk Talk Partner Edition must be enabled within Zendesk at an additional cost.
- To use RingCentral for Zendesk, RingCentral Office editions Premium or above is required.

Key Features

- Eliminated limitation of the hardware
 - Complete cloud-based voice service
 - Use your browser on any platform (Windows®, Mac®)
 - no software installation is needed.
- Increased call efficiency
 - Click to Dial within Zendesk. Spend less time in dialing, more time in serving customers.
 - Instantly reaction to calls on other devices. Call with the most enjoyable way, let our app deal with others
- Increased work efficiency
 - Auto match and related to records with the same number. Reduce the time for searching.
 - Configurable auto-create tickets for active calls. Never miss a log again.
 - Call transfer between agents will create related records.

About this Guide

This guide is specially designed for Zendesk users after RingCentral for Zendesk is installed and enabled by their company's administrator. This guide is not intended for system/network administrators and does not provide any information on how to set up the application or how to configure the Zendesk.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.

Before Getting Started

Preparation

For optimal user experience, ensure that:

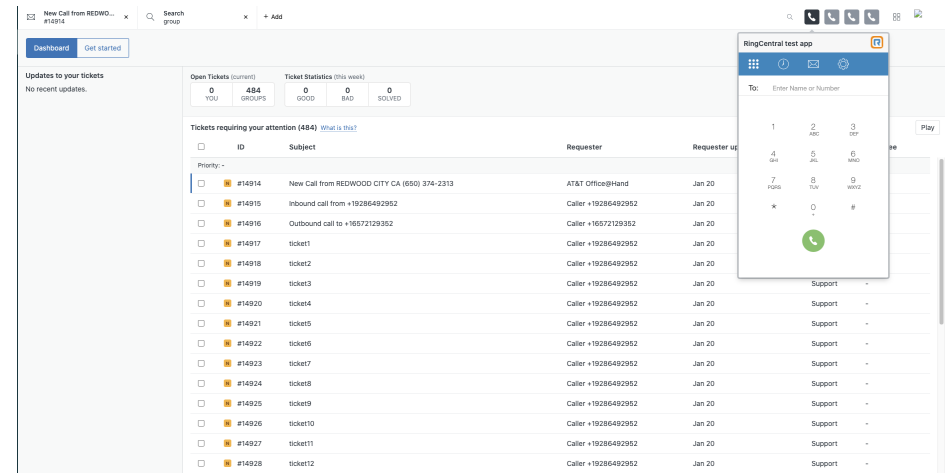
1. The browser you are using is updated to the latest version.
2. RingCentral for Zendesk is successfully installed and configured¹.
3. Login to Zendesk through the browser; the App will work only when the user is logged in to Zendesk.
4. Log in to RingCentral for Zendesk through Zendesk.
5. Your browser must have its pop-up blocker disabled for the Zendesk site.
6. RingCentral Desktop is installed.
7. Log in to RingCentral Desktop app with the same account as your RingCentral for Zendesk account.
8. Set correct Direct Numbers in Service Portal for making and receiving calls.

Reference Resource

- Admin Guide for installation and configuration
- RingCentral for Zendesk [Community](#)
- RingCentral for Zendesk in [RingCentral App Gallery](#)
- RingCentral Phone Desktop in RingCentral [App Gallery](#)
- [Helpdesk](#)

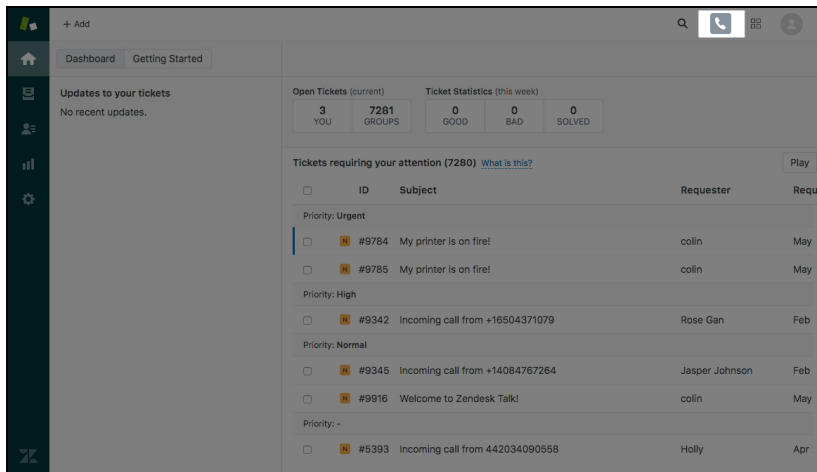
¹ Install and configure as described in the admin guide.

How it looks once RingCentral for Zendesk has been enabled:



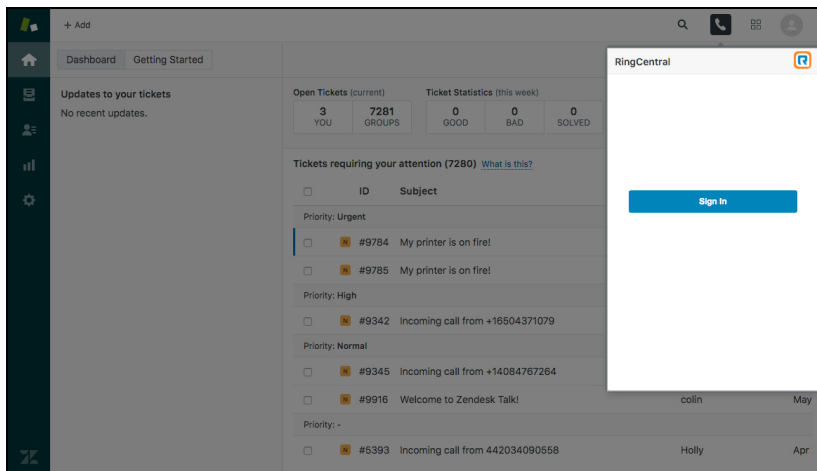
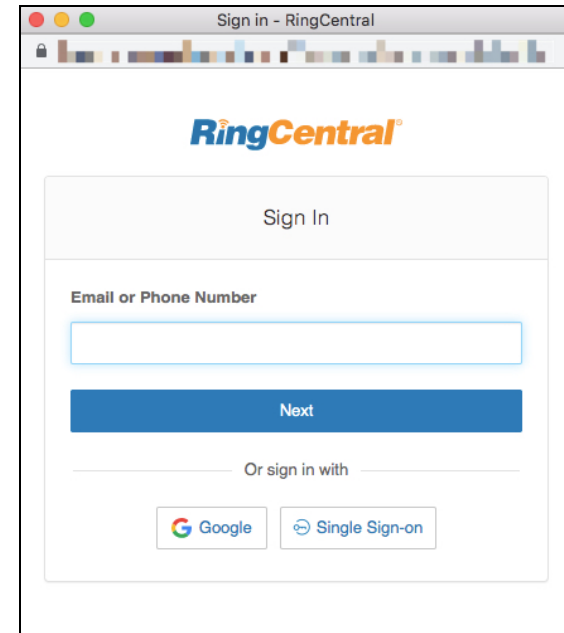
Login

When your RingCentral for Zendesk is successfully installed and configured, it will appear as an add-in icon on the right-hand side of the toolbar.



Clicking the icon shows the **Sign In** page. Use your RingCentral account to log in.

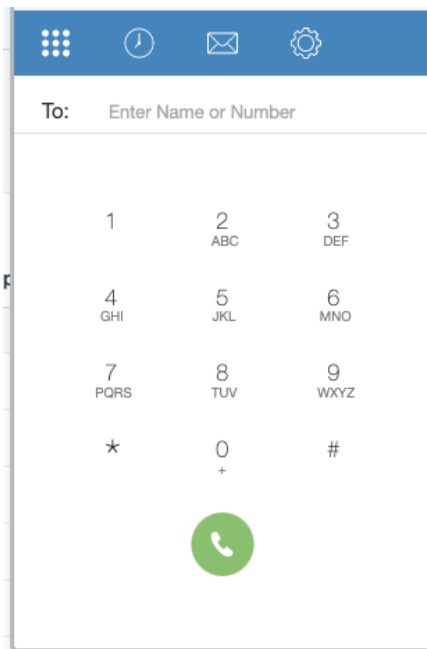
Note that the Sign In page appears in a popup window, so confirm that your permission settings allow popups to display.



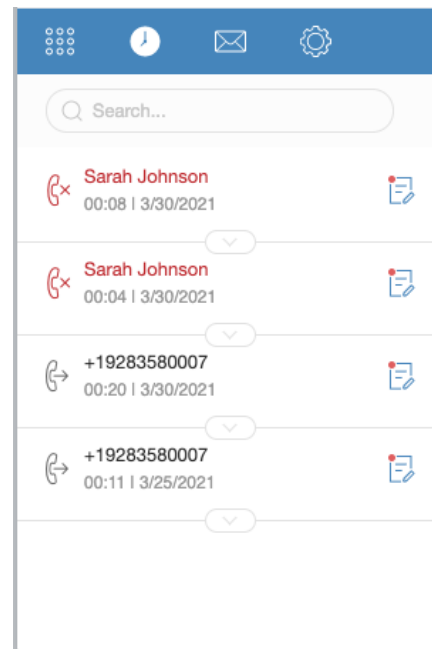
Overview

Main Pages

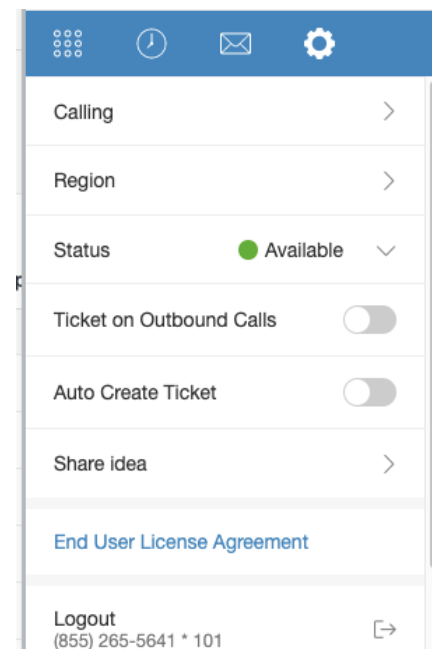
Once logged in, user will have access to **Dialer**, **History**, **Message**, and **Settings**.



Dialer



History

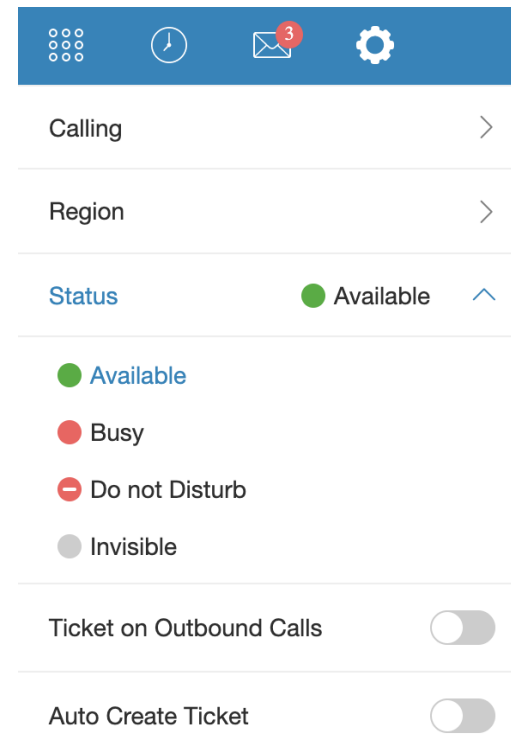


Settings

Settings Overview

RingCentral for Zendesk provides rich setting options to help users customize the app.

- **Calling** allows users to select calling preferences, including calling from the **RingCentral app desktop app**, registered **RingCentral phone**, or in some permission, **Other phone**.
- **Region** denotes the outbound call prefix.
- **Status** allows users to choose **Available**, **Busy**, **Do not Disturb**, and **Invisible**. The status syncs with your other RingCentral apps.
- **Ticket on Outbound Calls** to allow create tickets for outgoing calls
- **Auto Create Ticket** allows the App auto create tickets to Zendesk.

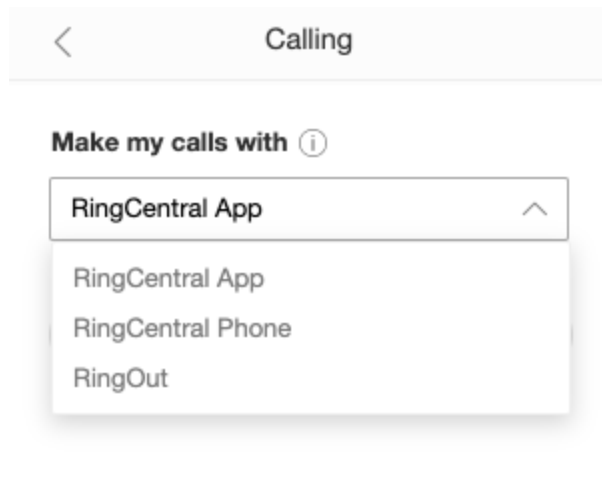


Dialer and Call

Before Calling

RingCentral for Zendesk allows you to place a call in CTI, and connect it with other devices, including the RingCentral Phone desktop app, your other RingCentral phones, or other custom phones.

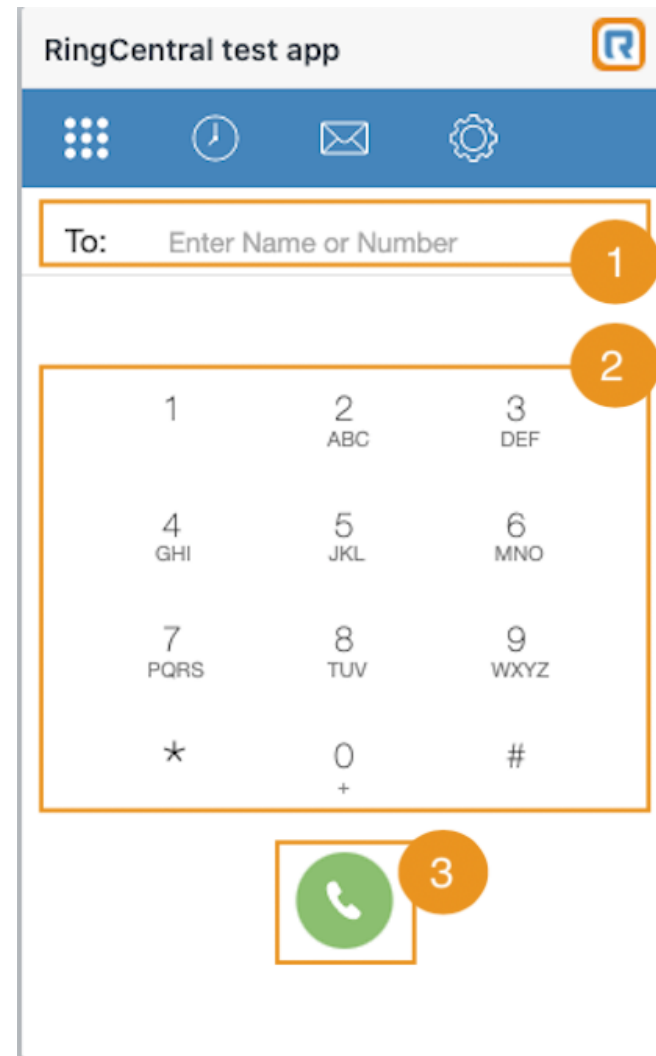
Select call options in **Settings -> Calling**.



There are 3 main areas in the Dialer.

1. The **To:** field allows you to input a phone number directly
2. Use the **Dialpad** to key in the call number.
3. Select the **Dial** button to connect your call.

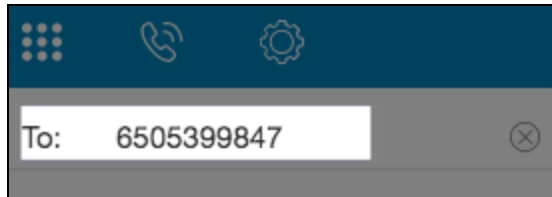
You could also dial from the **Dialpad**. And once you click the **Dial** button, a call will be placed and connected following your **Calling** settings.



Ways to Place a Call within Zendesk

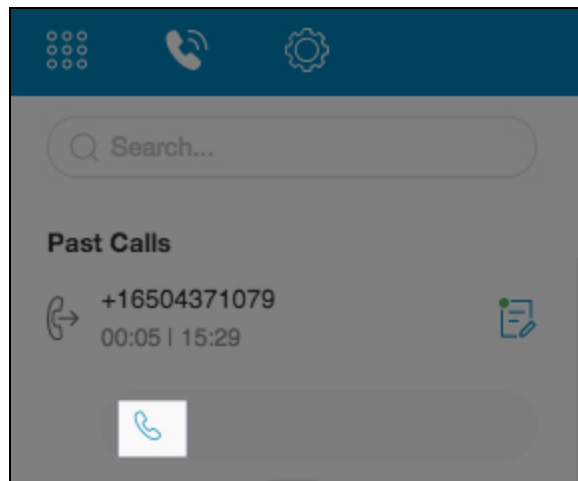
1. From **Dialer**

Place a phone number in the Dialer field.



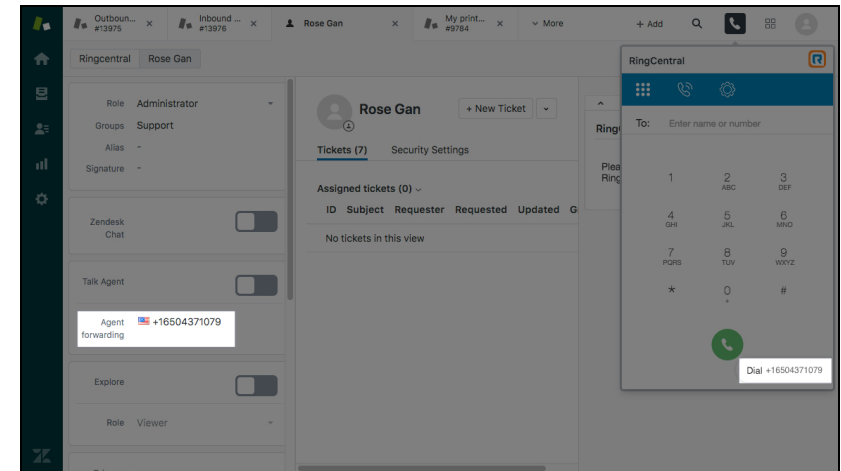
2. From **Call history**

A call button can be found in the extended toolbar for each entry in the call history. Click this button to place a call to this contact.



3. **Click to Dial** from Zendesk

One efficient way to make a call is Click to Dial from Zendesk. When users are browsing a contact or a ticket with phone number in Zendesk, users would be able to see a phone number catch by the App. One click, and the user would be able to make an outbound call.



Tickets and Calls

The main idea of Zendesk Support is creating and following up tickets. RingCentral for Zendesk provides the capability of

- Creating a new ticket for active calls
- Following up an existing ticket for active calls
- Auto create tickets on active calls
- Create or update a ticket from Call history

Manually Create Tickets

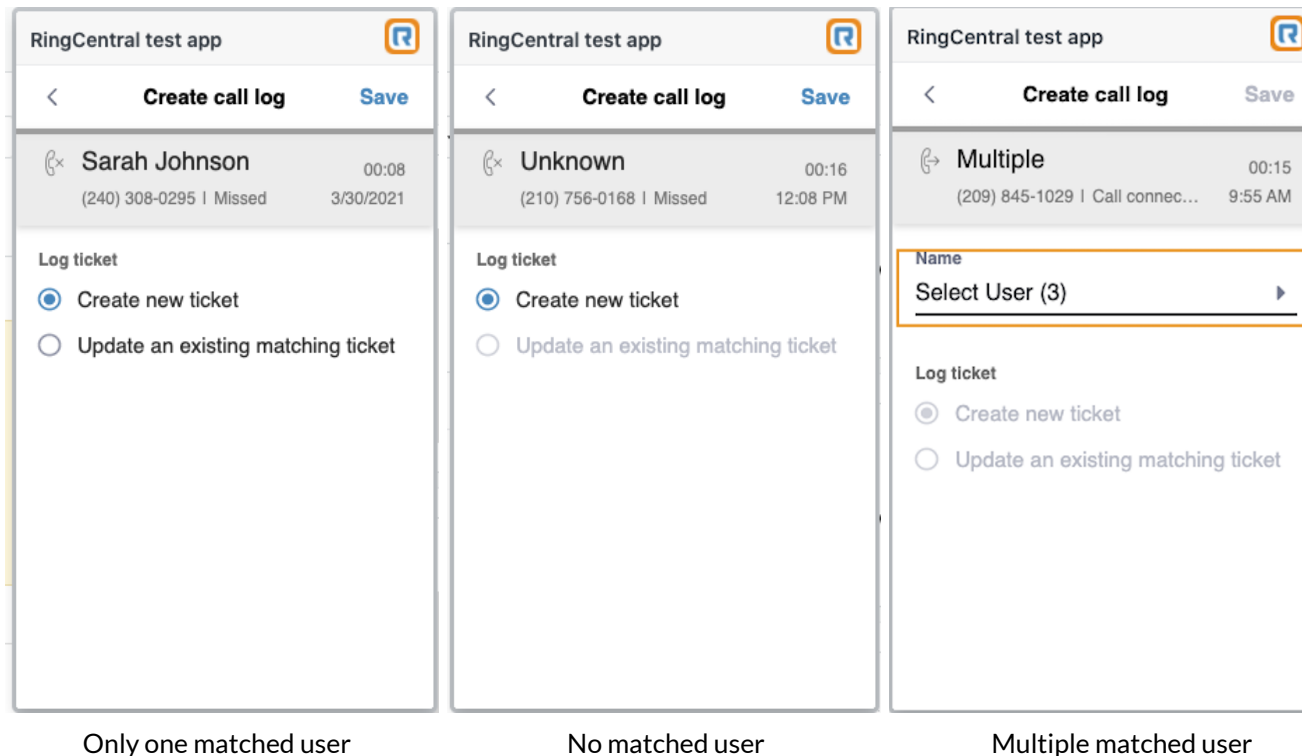
1. When there's an active call, the app will pop up to ask if you

to create a new ticket, or update an existing ticket with matched users.

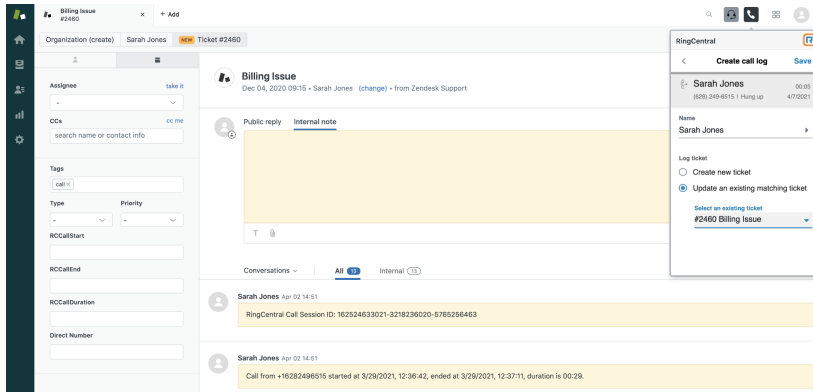
Notice that there must be an existing ticket with the same phone number, to allow updating.

2. Select "Save" to create a new ticket. The ticket will be opened in Zendesk, with basic call info.

Notice that if there is no matched user, RC app will create a user "User + phone number" to log a ticket; if there are multiple matched users, one user must be selected at call logging.



- When Update an Existing ticket was selected, the content of the existing ticket will be updated with the latest call info.

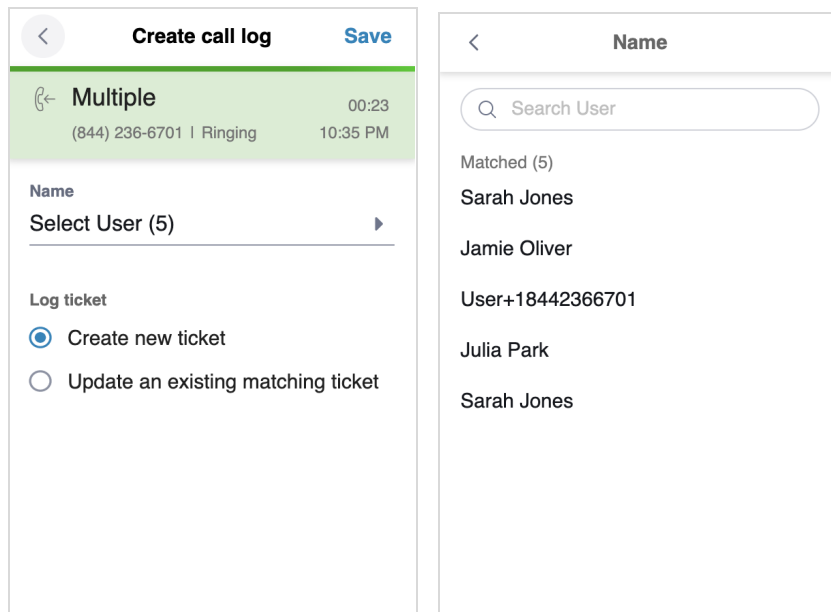


Auto Create Tickets

When the Auto create tickets toggle was turned ON in the Settings, when there's an active call, a ticket will be auto-created in Zendesk and be open for user

Select User for Multiple Match

Select user to log when there are multiple uses matched for a caller number



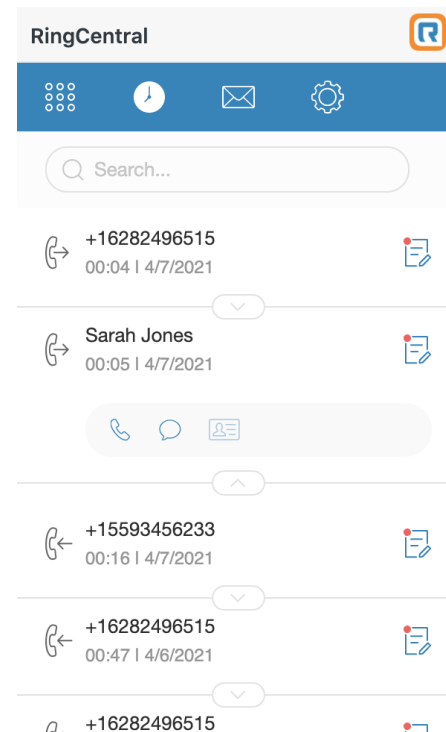
Call History

The call history page shows all the inbound and outbound call records.

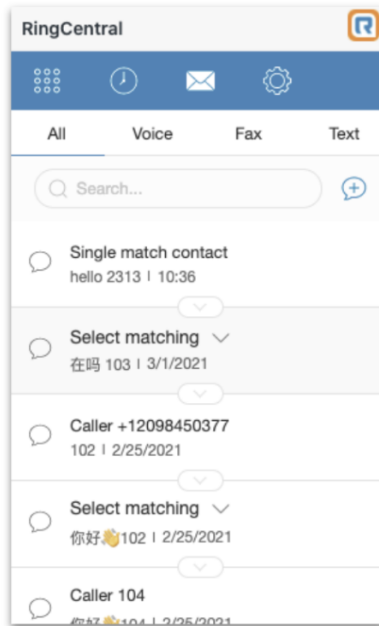
Users could call back with one click on the record.

Also, when a call was ticketed, the corner icon of the log is green, click the icon and the logged ticket will be opened.

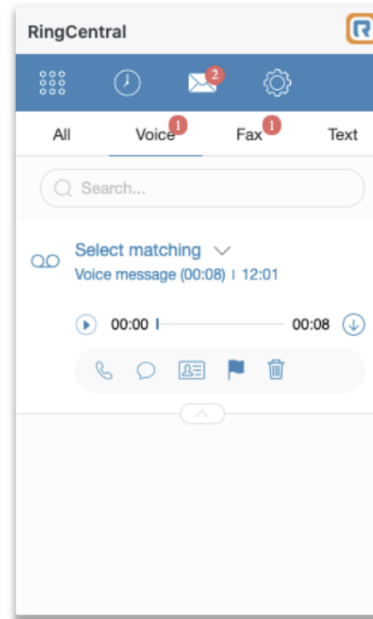
When a call was not ticketed, the icon is red. Click the icon and the user is able to log the call to Zendesk.



Messages (SMS/Voicemail/Fax)



All tab



Receive/Download/Play
Voicemail

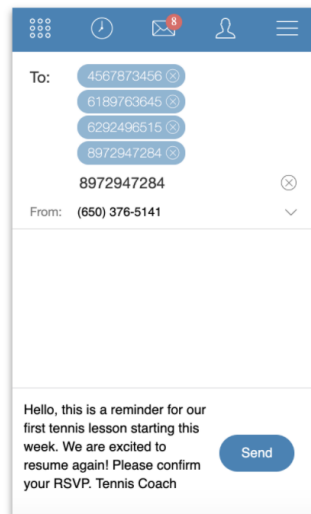
Send and Receive SMS

P2P (person to person) SMS in Zendesk is messaging that mimics human behavior and adheres to the CTIA guidelines of a maximum of:

- Send text messages up to 50 numbers
- 15-60 SMS messages per minute
- 1,000 SMS messages per day
- 1 unique phone number per sender
- 100 recipients per message
- 1:1 ratio for sending and receiving SMS

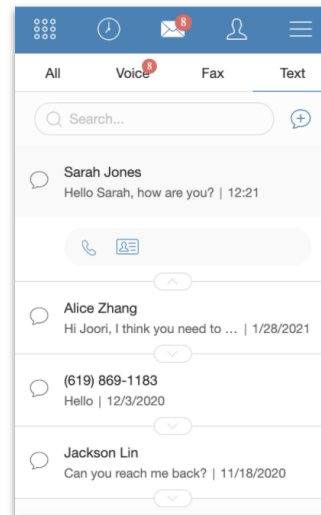
**SMS Logging isn't available yet as of today.

Send SMS up to 50 people



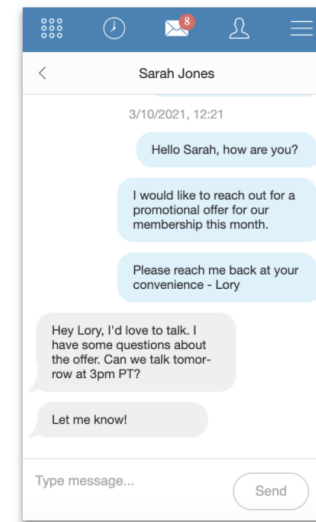
Send peer to peer text messages up to 50 numbers

Open 1:1 SMS threads with each individual



Sending bulk messages will open individual sms threads

Respond to inbound SMS



Manage 1:1 conversation threads with each person from the convenience of Zendesk

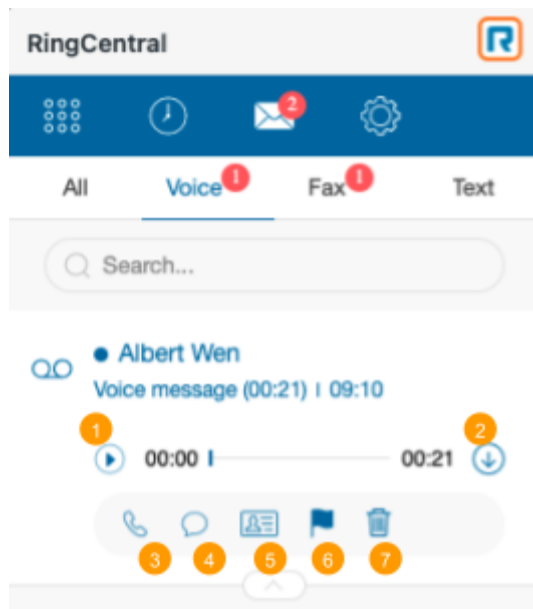
Voicemail

RingCentral for Zendesk offers rich features for Voicemail.

Newly received voicemails are listed in both the **All** tab and in the **Voice** tab on the Message page.

Expanding the toolbar shows all available tools

1. **Play voicemail**
2. **Download voicemail**
3. **Call back**
4. **Send SMS**
5. **Add contact / view contact**
6. **Mark as read / unread**
7. **Delete voicemail**



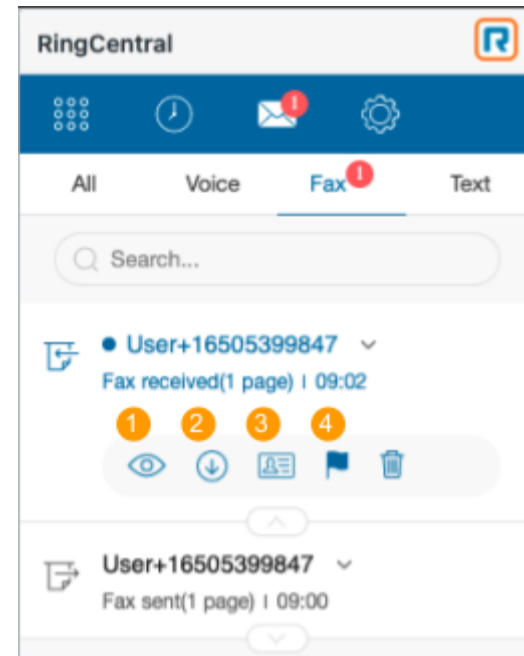
Fax

Users are able to receive faxes in RingCentral for Zendesk.

When a fax is received, it is listed in the **All** tab and the **Fax** tab in the **Message** page.

Expanding the toolbar shows all available tools:

1. **View Fax**
2. **Download Fax**
3. **Add contact / View contact**, depending on whether this is a new or existing contact in Zendesk.
4. **Mark as read/unread**



FAQ

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

A: No, RingCentral for Zendesk does not require any special permissions and it should work for all user profiles. Please ask your Zendesk Administrator to ensure that RingCentral for Zendesk is enabled for the Zendesk role you are a member of.

Q: Can I use the same RingCentral for Zendesk across multiple Zendesk instances?

A: Yes you can. You will need to contact your Zendesk Administrator to setup and enable the RingCentral Cloud App for Zendesk for each of your instances.

Q: Can I use the same RingCentral for Zendesk across multiple browsers (Internet Explorer and Firefox, for example)?

A: The same RingCentral for Zendesk 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 Zendesk 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 RingCentral for Zendesk.

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

A: You will have to request that your Zendesk Administrator remove Zendesk user role that you belong to from RingCentral for Zendesk via settings.

Q: What Operating Systems are supported?

A: The following Operating Systems are supported:

Windows XP, 7, 8 and above.

Mac OS X® Mountain Lion and above.

Q: What browsers are supported?

A: RingCentral for Zendesk for Salesforce supports the following browsers:

Firefox 37 and higher (Windows, Mac)

Chrome 41 and higher (Windows, Mac)

Safari 8 or and higher (Mac)

Q: On logging into RingCentral for Zendesk, I am getting this error message: "Your RingCentral edition does not support Zendesk Integration - please call your RingCentral account representative to upgrade your RingCentral edition." What is that?

A: Zendesk integration is available for RingCentral Office Premium and Enterprise edition users. Please check with your RingCentral Administrator or contact your RingCentral representative to get more information about this feature.

Q: Search results are not displaying records that match the caller ID.

A: Check the format of the phone number in Zendesk. Ensure the format is standardized per Zendesk features.