

RingCentral for Salesforce

UK 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:

- **No software to install**—works entirely in the cloud with any RingCentral device
- **Works on any computer, any browser**—Access anytime on any PC or Mac
- **Works with any Salesforce Cloud** – Sales Cloud, Service Cloud, Marketing Cloud—if you've got it, we support it
- **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
- **New browser tab** for every call enabling multiple interactions at once
- **Automatic call dispositions** for quick call logging
- **Accurate call logs** saved to the corresponding record
- **New records**—Accounts, Contacts, Leads can be easily created while on call

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.

Basics

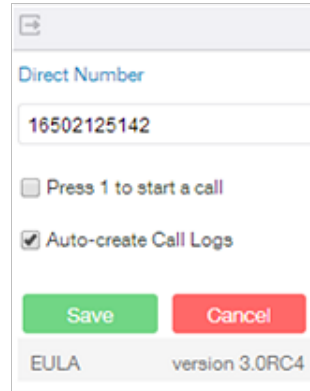
For optimal user experience, ensure that:

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 Portal 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

There are only two options to set. You can get to these options by clicking in the gear icon in the top navigation bar.

1. **Direct Number:** This is the number from which outgoing calls will be made. This field cannot be left blank.
2. **Press 1 To Start An Outbound Call:** When you make an outgoing call, RingCentral will first call you at your RingCentral Direct Number. Once you answer the call, you will have an option to press **1** before the call is connected to the other party. If this option is not enabled, then RingCentral will call your number and the dialed number simultaneously.
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 only be created if you press the Save button in the logging area during or after the call.



The screenshot shows a settings dialog box with a title bar containing a gear icon. The main content area has a label 'Direct Number' in blue text above a text input field containing the number '16502125142'. Below the input field are two checkboxes: 'Press 1 to start a call' which is unchecked, and 'Auto-create Call Logs' which is checked. At the bottom of the dialog are two buttons: a green 'Save' button and a red 'Cancel' button. Below the buttons is a footer area with the text 'EULA version 3.0RC4'.

Figure 1

Click the **Save** button to save your settings. These settings are cleared when the user logs out RingCentral for Salesforce, but will persist if the user logs out from Salesforce instance without logging out from the application and had also selected the option **Remember Me** on the login screen while logging in.

Login

Open your browser and login to your Salesforce account. If this is the first time you are using RingCentral for Salesforce, you will see a form as shown in Figure 2, allowing you to login to your RingCentral account. Type in the your RingCentral Direct Number and your RingCentral account password.

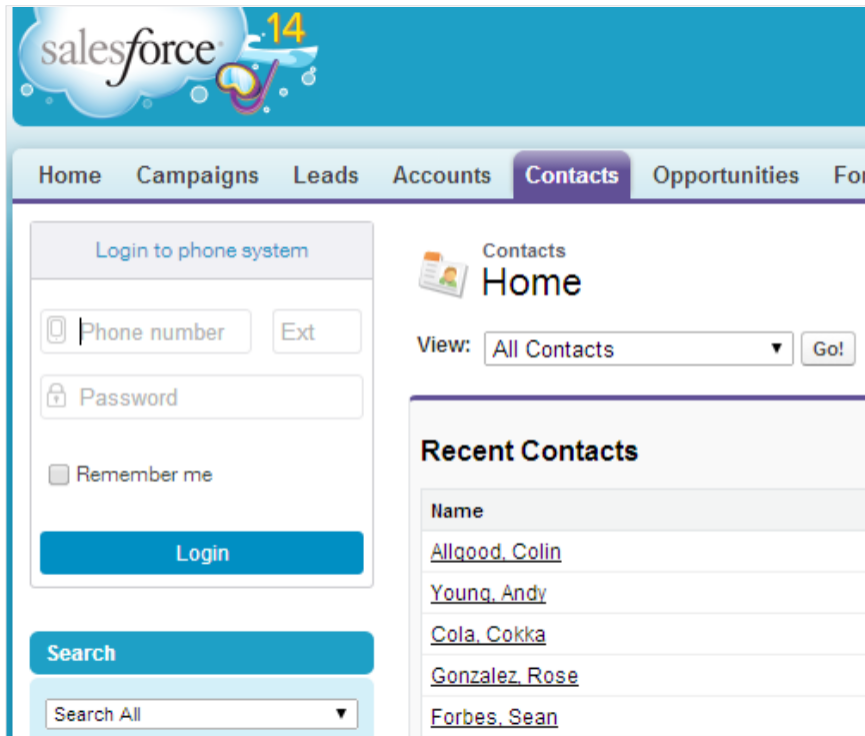


Figure 2

If you select the **Remember Me** option provided on this page, the App will not ask you to provide your credentials again for one week. If you do not login for a week, you will be asked to provide your credentials again. Also, your credentials are stored in the browser, so if you login from some other browser or computer/laptop/tablet, you will need to login again.

Once the login is successful, the App layout will change to as shown in figure below.

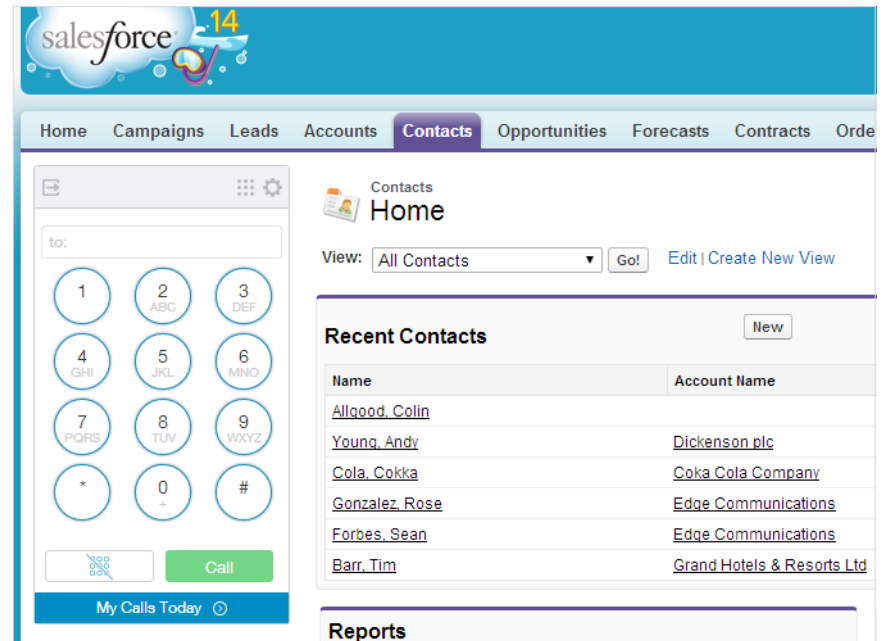


Figure 3

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 4)
2. Use the click-to-dial feature (Figure 5)



Figure 4

Account Name	Phone
United Oil & Gas Corp.	(408) 400-3868
Express Logistics and Transport	(408) 717-4882
Edge Communications	(512) 757-6000
GenePoint	(408) 717-4882
Edge Communications	(408) 717-4882
Grand Hotels & Resorts Ltd	(312) 596-1000

Figure 5

RingCentral will first call you at your RingCentral Direct Number and the App dialer will change to the screen shown below during the time the call is being connected. If the dialed number matches any Salesforce records such as Contacts, Accounts, etc., the records will be displayed.

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.

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 only be created or updated when you press the Save Log button.


You are free to hang up the phone through which you are speaking to the called party, 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.

Placing an International 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:

Phone +33 34627 28532 

Incoming Calls

When an incoming call is received, you are notified about the incoming call on your RingCentral for Salesforce. In addition to the app notification, other phones will ring depending 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.

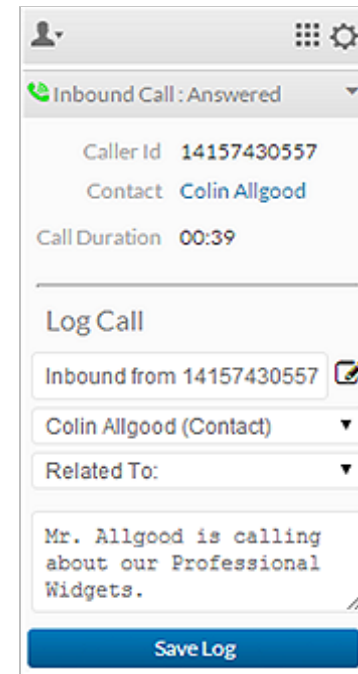


Figure 6

To save the log as related activity, select the appropriate contact/account from the dropdown and after typing the subject and your comments, click the **Save Log** button.

Activity Reports

As you log calls, you will see a new link (**My Calls Today**) added at the bottom of the RingCentral app UI. Clicking the link will take you to a report displaying all of your calls today.

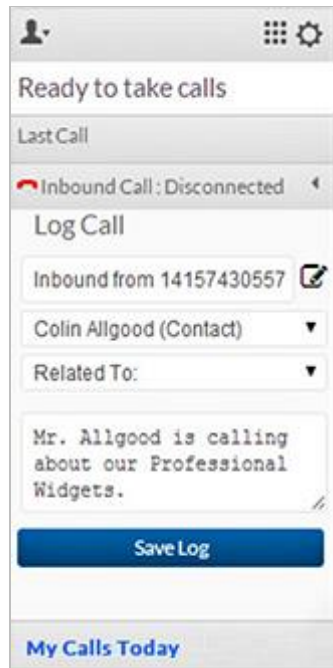


Figure 7

You can also use the Salesforce.com standard reporting interface on the Task object to report on call logs made by your group or team.

Using Preset Call Dispositions

To allow for faster call logging, preset call dispositions can be accessed using the icon to the right of the Subject area. Selecting a preset call disposition will overwrite anything that has been typed into the Subject area, although you can edit the Subject after having selected a preset call disposition.

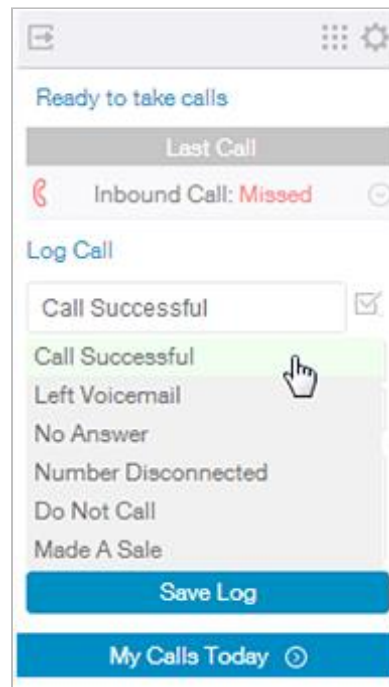


Figure 8

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.

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 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 Operation Systems are supported?

A: The following Operating Systems are supported:

- Windows XP, 7, 8 and above.
- Mac OS X Mountain Lion and above.

Troubleshooting—continued.

Q: What browsers are supported?

A: RingCentral for Salesforce supports the following browsers:

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

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

A: Salesforce 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: Incoming calls are not notified in the Salesforce interface, even if everything is set up correctly.

A: At least one tab in the browser should be displaying the RingCentral for Salesforce interface for incoming calls to be notified.

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

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