

RingCentral for Salesforce Lightning

[Admin Guide](#)

For v6.12.0 and Later



CONTENTS

Introduction	4
About RingCentral for Salesforce	4
About this Guide	4
Installation and Setting up the Call Center	5
Step 1: Install RingCentral for Salesforce.	5
Step 2: Configure the Call Center.	16
Step 3: Add Users to the Call Center.	22
Setting up SoftPhone Layouts in Salesforce	27
Step 1: Set up a SoftPhone Layout	27
Step 2: Add custom objects to a SoftPhone layout (optional).	32
Step 3: Assign the Softphone Layout to Users.	35
Enabling RingCentral Video Meetings through Global Action	37
Setting up Global Action Layout in Salesforce	37
Step 1: Navigate to Global Action Layout configurator	37
Step 2 Configure the Layout	37
Step 3 Assign to roles	39
Launch App in Lightning View	41
Add Open CTI Softphone to Your Lightning App.	46
Setting up Preset Call Dispositions	51
Share Report Folder with Users	54
AdminUI	56
Call Recording	58
Analytics Report	61

Cloud Phone Reports (beta)	65
Add RingCentral Call and SMS Options to Salesforce Mobile App	67
Create New Actions	67
Add Actions to Salesforce Mobile App.	71
High Velocity Sales (HVS) Settings (beta)	75
Enabling Do Not Contact	79
Troubleshooting	86

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

Other System Requirements:

- RingCentral Office Premium and above
- Windows XP+, Vista, Windows 7 and 8 - 32bit/64bit
- MAC OS X 10.8 Mountain Lion+
- IE11+ / IE Edge 38+ / Firefox 52+ / Chrome 56+ / Safari 6.0.5+ (Classic only)
- RingCentral Softphone
- .Net Framework 3.5
- 10-digit phone system

About this Guide

This guide is specifically designed for System Administrators of the Salesforce.com application. This guide is not intended for end users and does not provide any information on using the application or related information. This Administrator guide will show you how to set up your Salesforce.com instance to enable your users to use RingCentral for Salesforce within their Salesforce.com interface.

This Admin Guide is specifically for RingCentral for Salesforce Lightning version 6.x. The Admin guide for Salesforce Lightning for older (5.x) versions can be accessed [here](#). All related guides for RingCentral for Salesforce can be accessed from the [Salesforce AppExchange](#).

Installation and Setting up the Call Center

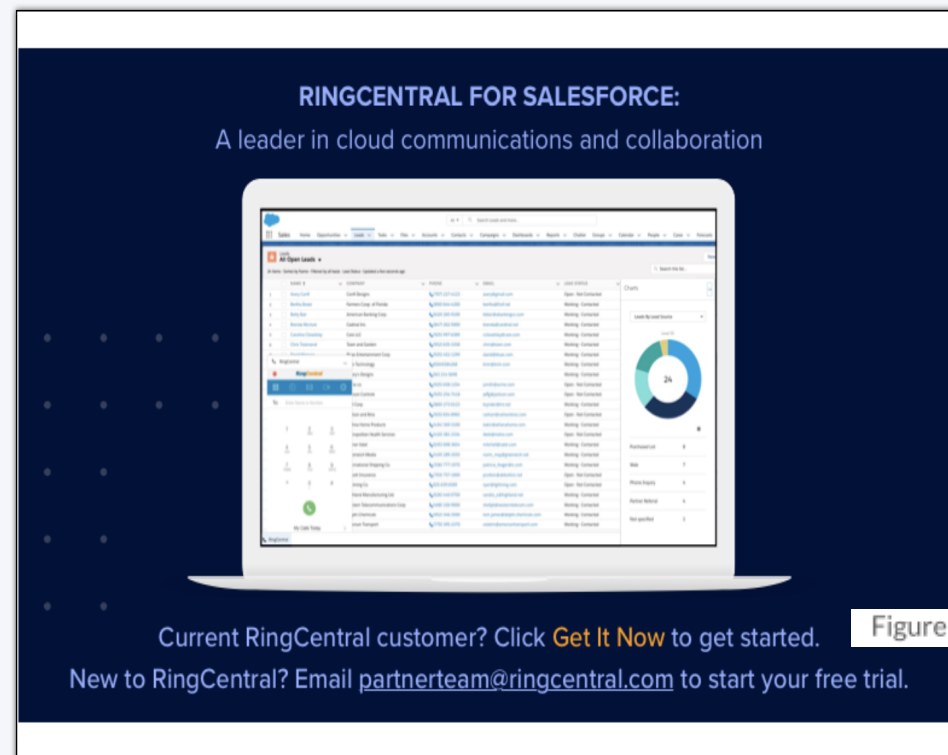
Step 1: Install RingCentral for Salesforce.

Install the RingCentral for Salesforce package from the AppExchange [here](#). Click **Get It Now** to start the installation. Installation of this application requires an administrator login to Salesforce.com.

ALL APPS > CUSTOMER SERVICE > TELEPHONY

RingCentral for Salesforce: Click-to-Call | Dialer | Telephony | Phone

By RingCentral, Inc.



RINGCENTRAL FOR SALESFORCE:
A leader in cloud communications and collaboration

Current RingCentral customer? Click **Get It Now** to get started.
New to RingCentral? Email partnerteam@ringcentral.com to start your free trial.

Figure 1

Starting at \$34.99 USD per user per month ⓘ

Get It Now

Discounts available for nonprofits

RATING
★★★★☆ (42)

LISTED ON
8/22/2017

LATEST RELEASE
4/29/2020

CATEGORIES
Telephony

Watch Demo

Gain insights with every call, integrated cloud business communications

RingCentral for Salesforce enhances your CRM experience by integrating cloud business communications to improve workforce productivity, increasing call efficiency, and enhancing customer interaction.

Click "GET IT NOW" to try today!

Log In to AppExchange

To continue, log in with your Salesforce credentials.

Log In

By submitting this request, you agree to share your information with Salesforce and the provider of this listing, RingCentral, Inc..

Listing: RingCentral for Salesforce

Don't have a Salesforce account?

Continue as Guest

Cancel

Figure 2

Where do you want to install this package?

Before you install in a production org, we suggest testing in a sandbox.

Install in a Production Environment
Install where you or your users work, including developer orgs.


Install in Production

Install in a Sandbox
Test in a copy of a production org.

Install in Sandbox

Cancel

Figure 3

 Review the [customization guide](#) for installation and configuration steps.

Package	Version
rc_sf_package (5.10.2 / 5.11.0)	5.10.2 / 5.11.0
Subscription	Organization
Free	SKumar & Co
Duration	Number of Subscribers
Does Not Expire	Site-wide
Username	
skumarco777@gmail.com	

☒ I have read and agree to the [terms and conditions](#).

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

Cancel

Confirm and Install

Figure 4

During installation, you will be asked what subset of users to whom you wish to grant access. It is generally recommended to select Grant Access to All Users, as this will ensure that Step 2 below will go smoothly. However, users will not actually have access to RingCentral for Salesforce until the administrator adds them to the Call Center, as detailed below.

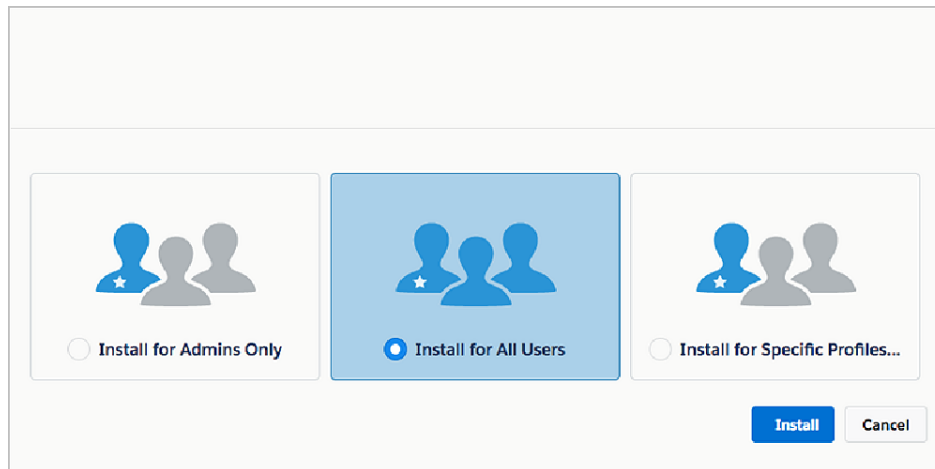


Figure 5

Wait for the installation to complete.

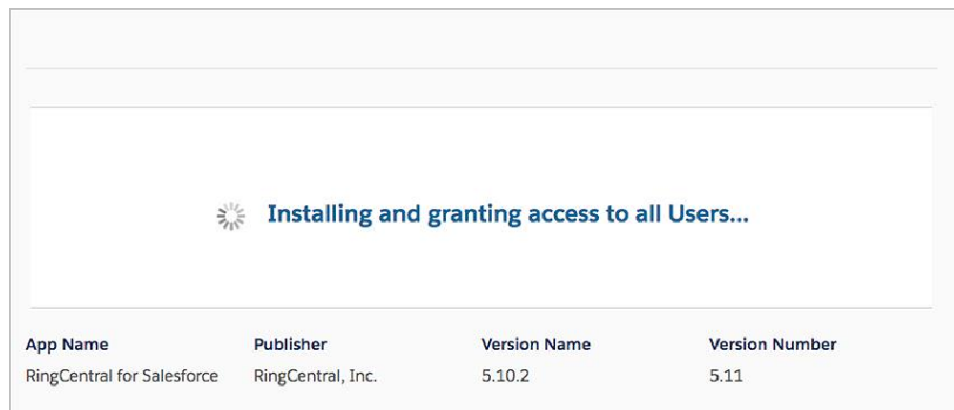


Figure 6

Click **Done** when the installation is complete.

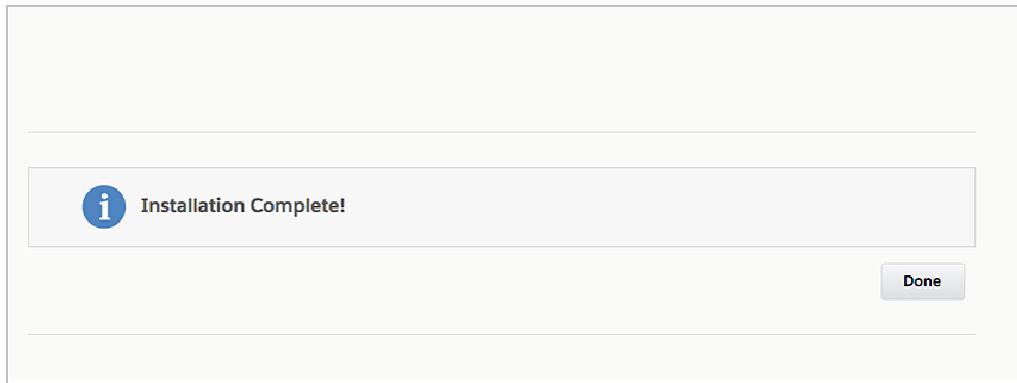



Figure 7

After the installation, the RingCentral for Salesforce application will be listed as **rc_sf_package** in the installed packages section within the Setup.

 **SETUP**

Installed Packages

Installed Packages




On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment.

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses
Uninstall 	SalesforceIQ Cloud	Salesforce	1.0	SIQCloud	Free	N/A	N/A
Description This tool will create a secure connection between Core Salesforce and SalesforceIQ infrastructure to pull data into the machi							
Uninstall 	rc_sf_package	RingCentral	6.8	rcsfl	Active	Unlimited	0
Uninstall 	Sales Insights	Salesforce	1.0	OIQ	Free	N/A	N/A
Description This tool creates a secure connection between core Salesforce data and our sales intelligence infrastructure where advanced							

Uninstalled Packages

No uninstalled package data archives


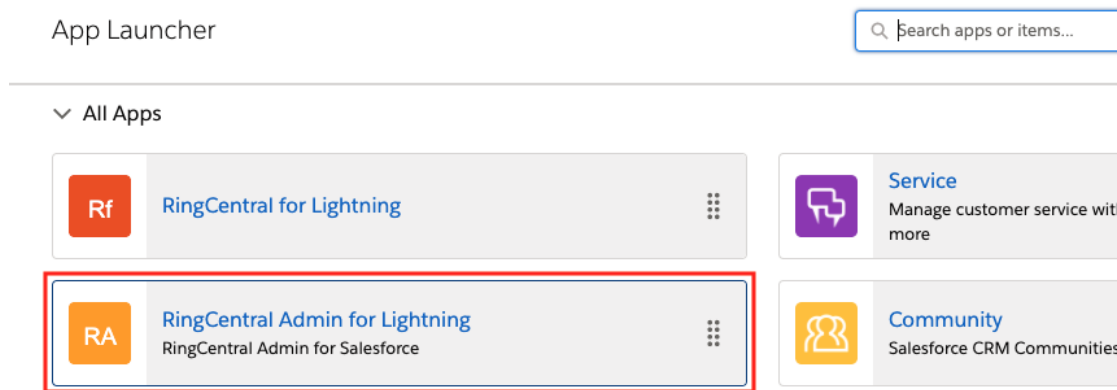
[Uninstall](#)  [rc_sf_package](#) RingCentral 6.8

Figure 8

Steps for Setup & Configurations for First-time Installation

Note: If this is the first time you have installed RingCentral for Salesforce, you can use the new Install wizard tool to set up & configure the CTI. Please follow the steps below to access the Install Wizard and start your setup & configuration.

Install Wizard can be accessed from the Salesforce App Launcher by clicking on **RingCentral Admin for Lightning**.



The Install wizard will guide you through all the required steps for configuring the RingCentral for Salesforce application. The install wizard is divided into seven steps for configuring various settings.

1. Welcome

This step is for an informational purpose and needs no action. It shows the major version of the app that is being installed.

2. Setup Your Call Center

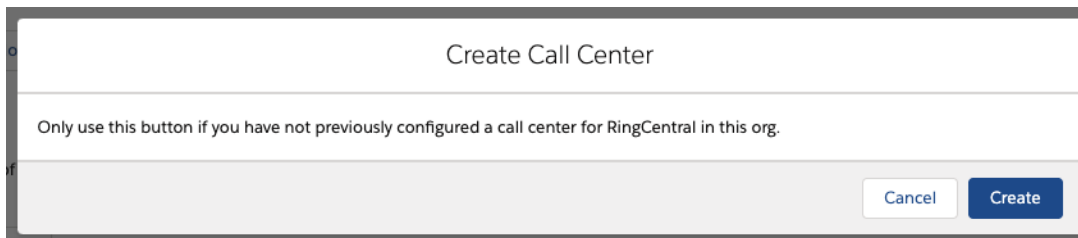
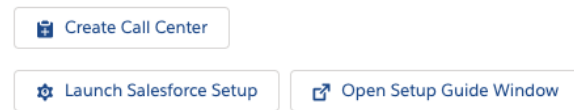
In this step, you will create the Call Center for your organization. You will click on the **Create Call Center** button to create the call center.

✓ 2 Setup Your Call Center

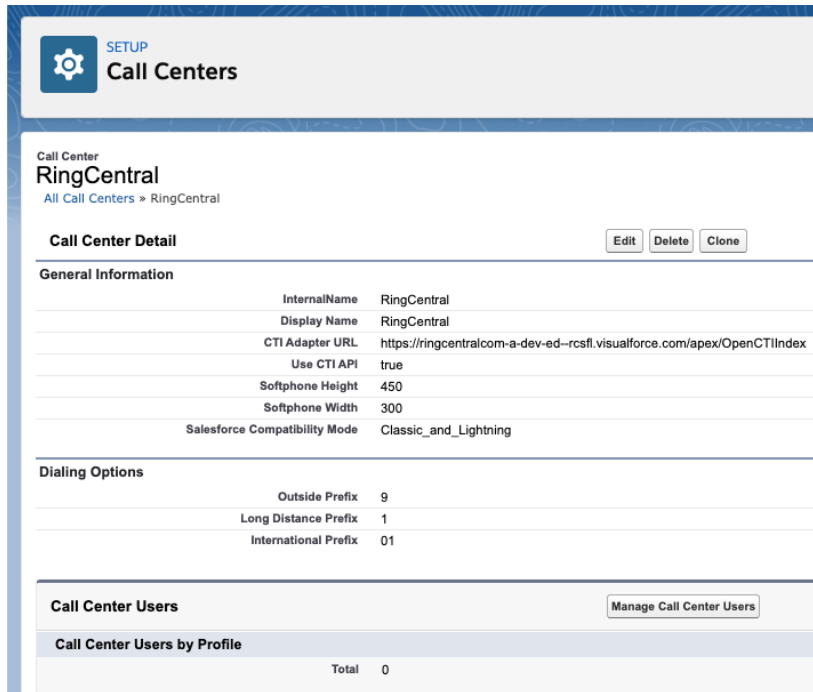
In this step you will create your Call Center, configure Call Dispositions and enable users in your organization to access their RingCentral call recordings.

Call Center Configuration

In this step you will create your Call Center for your organization. Selecting the "Create Call Center" button below will initiate and auto generate your Call Center details. Once Call Center setup is complete you can review the settings and details using the "Launch Salesforce Setup" button.



You can verify the creation of the call center by clicking on the **Launch Salesforce Setup** button.



SETUP
Call Centers

Call Center
RingCentral
All Call Centers » RingCentral

Call Center Detail [Edit](#) [Delete](#) [Clone](#)

General Information

InternalName	RingCentral
Display Name	RingCentral
CTI Adapter URL	https://ringcentralcom-a-dev-ed--rcsfl.visualforce.com/apex/OpenCTIIndex
Use CTI API	true
Softphone Height	450
Softphone Width	300
Salesforce Compatibility Mode	Classic_and_Lightning

Dialing Options

Outside Prefix	9
Long Distance Prefix	1
International Prefix	01

Call Center Users [Manage Call Center Users](#)

Call Center Users by Profile

Total	0
-------	---

Note: The **Create Call Center** option will be disabled during upgrades. It will only be available when the application is installed for the first time.

After the call center is created, you can set up dispositions. This is an optional step and can be skipped if the **Subject** field in the activity is not used or the default values suffice the use case for your organization.

Also, you can configure to access call recordings from the logged call activity.

3. Assign users to Call Center & Reporting

Now is the time to assign the RingCentral CTI application to the users in your organization. You can search and assign available users to the RingCentral CTI Application.

✓ 3 **Assign Users to Call Center and Reporting**

In this Step you will add users to the Call Center as well as assign users to the Cloud Phone Report folder.

Assign Users to Call Center

Using the feature below select the users you wish to add to the RingCentral call center. You can also remove users from the call center with this feature.

Search Users

Available Members

Integration User

Security User

Selected Members

Kumar S

Now, you are all set, and your end users can start using the application. You can continue with the additional configurations as required for the organization.

You can enable users to access call reports by following the steps in **Launch Salesforce Reports**.

Assign Cloud Phone Report Folder

Here you can launch into the specific Salesforce Setup pages for assigning users to the Cloud Phone Report folder. You can also open the Setup Guide Window to get step by step instructions and screenshots for completing this RingCentral setup step.

4. Add Phone to Apps

With this step, you can learn how to add RingCentral to Lightning apps as well as to the Utility Bar. Click on the **Launch Salesforce Setup** to open the relevant section in Salesforce Setup. You can access the detailed instructions by clicking on the **Open Setup Guide Window**.



4

Add Phone to Apps

With this step you can learn how to add RingCentral to Lightning Apps as well as to the Utility Bar.

You can add Open CTI Softphone to any of your Lightning Apps. This way the Softphone will display in the Utility Bar of those selected Lightning Apps. This feature enhances the user experience and overall productivity

 [Launch Salesforce Setup](#)

 [Open Setup Guide Window](#)

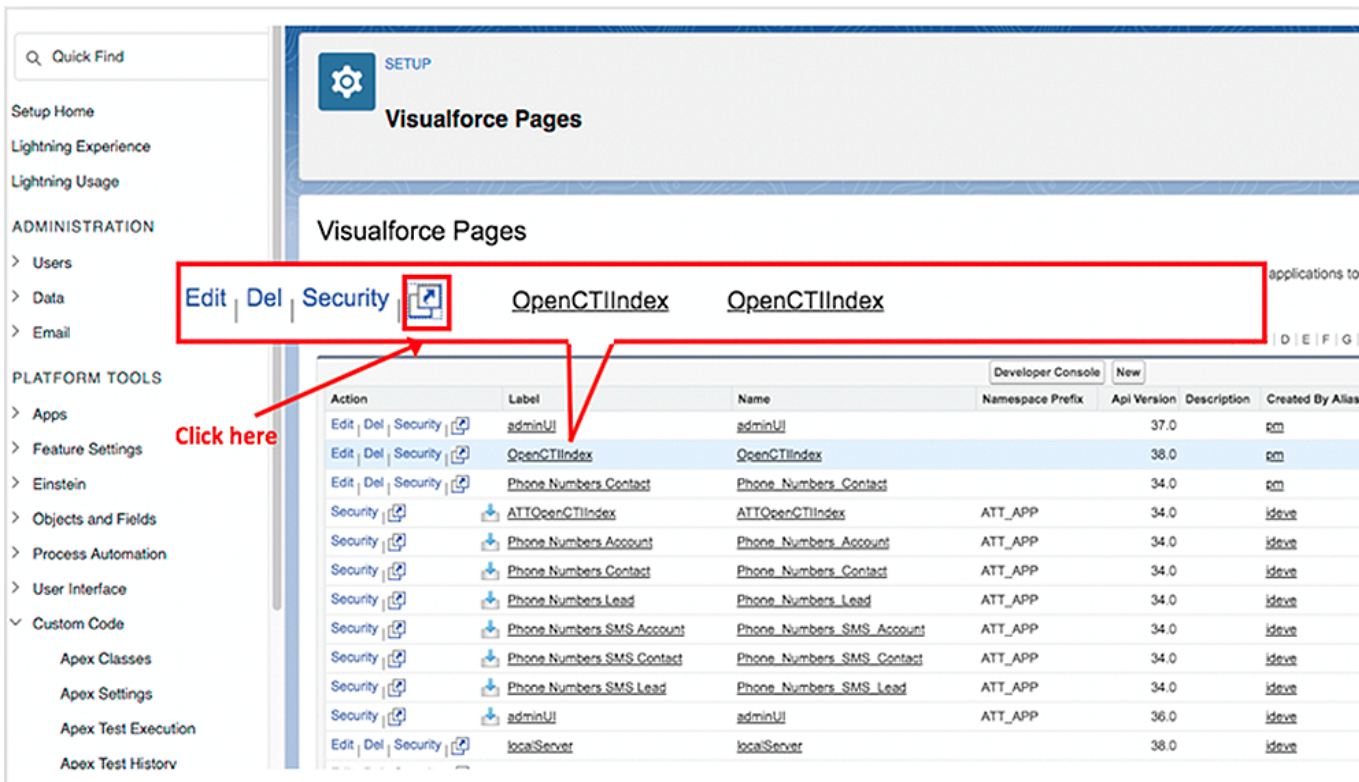
Steps 5 through 7 of the wizard walk you through enabling additional settings such as Mobile experience, Analytics, configuring softphone layout and Admin settings for the RingCentral app.

Steps for Setup & Configurations for Upgrade to the new version

Note: If you have already installed RingCentral for Salesforce in the past and are upgrading to the latest version of the integration, please follow the steps below.

Step 2: Configure the Call Center.

Step 2.1: Navigate to **Setup > Visualforce Pages**, click the preview icon next to the **OpenCTIIndex**.



Visualforce Pages













Action	Label	Name	Namespace Prefix	Api Version	Description	Created By Alias
Edit Del Security 	adminUI	adminUI		37.0		cm
Edit Del Security 	OpenCTIIndex	OpenCTIIndex		38.0		cm
Edit Del Security 	Phone Numbers Contact	Phone Numbers Contact		34.0		cm
Security 	ATTOpenCTIIndex	ATTOpenCTIIndex	ATT_APP	34.0		deve
Security 	Phone Numbers Account	Phone Numbers Account	ATT_APP	34.0		deve
Security 	Phone Numbers Contact	Phone Numbers Contact	ATT_APP	34.0		deve
Security 	Phone Numbers Lead	Phone Numbers Lead	ATT_APP	34.0		deve
Security 	Phone Numbers SMS Account	Phone Numbers SMS Account	ATT_APP	34.0		deve
Security 	Phone Numbers SMS Contact	Phone Numbers SMS Contact	ATT_APP	34.0		deve
Security 	Phone Numbers SMS Lead	Phone Numbers SMS Lead	ATT_APP	34.0		deve
Security 	adminUI	adminUI	ATT_APP	36.0		deve
Edit Del Security 	localServer	localServer		38.0		deve

Figure 9

After the page opens in a new tab or window, copy its URL. For example, the full URL is <https://c.na78.visual.force.com/apex/OpenCTIIndex>.

Close the tab and return to **Setup Home > Call Centers** and click **Continue**.

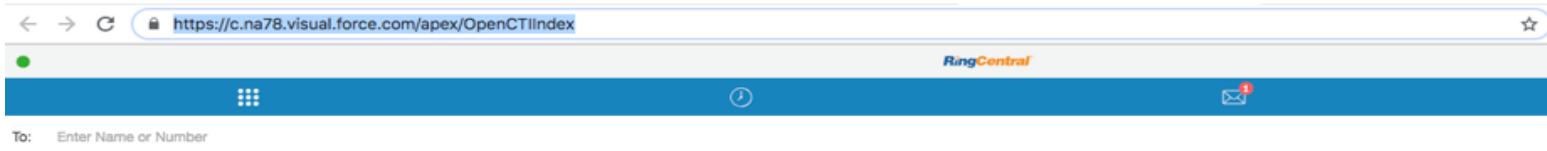


Figure 10

Step 2.2: Paste the copied URL in the call center.

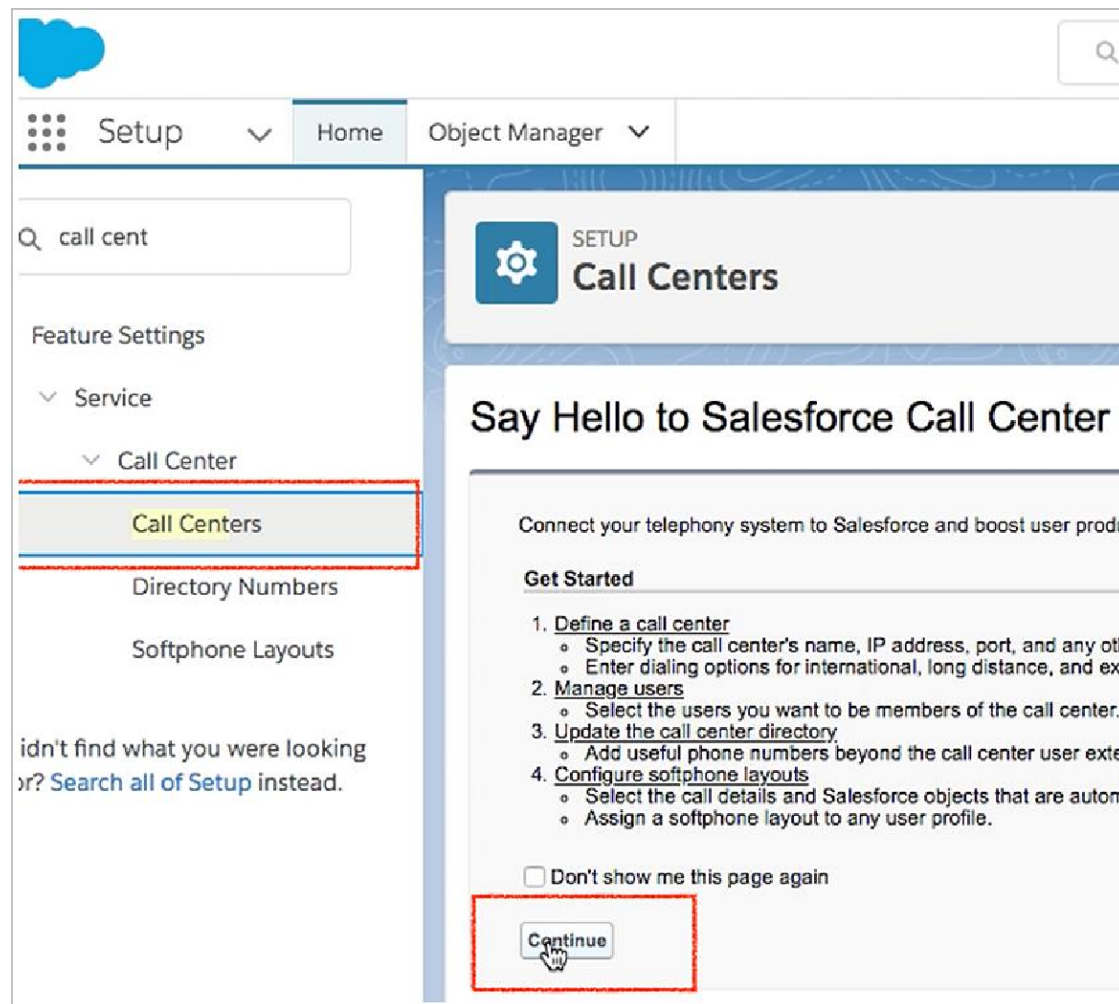


Figure 11

Select the call center Cloud Phone App and click **Edit**.

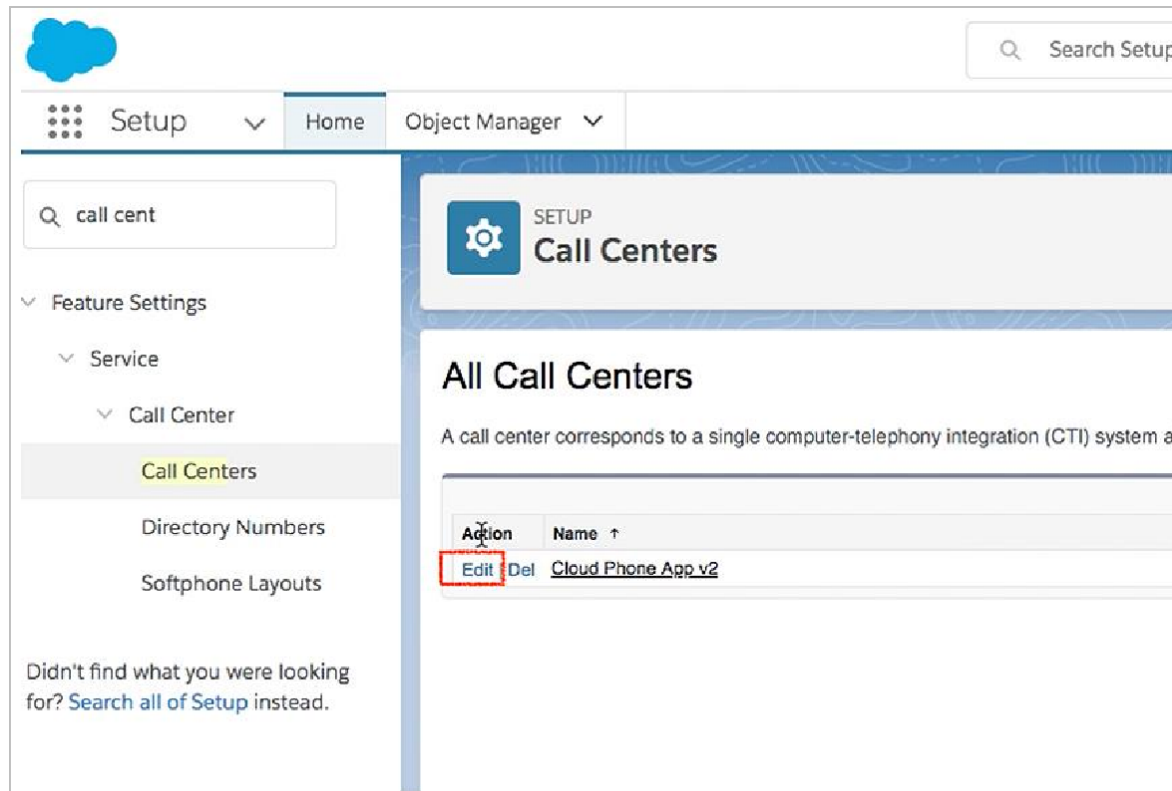


Figure 12

Paste the URL from the **OpenCTIIndex** page to CTI Adapter URL, then click **Save**.

The screenshot shows the Salesforce Setup interface for configuring a Call Center. The left sidebar contains a search bar with 'call cent' and a navigation menu with 'Feature Settings', 'Service', 'Call Center', and 'Call Centers' (highlighted). The main content area is titled 'SETUP Call Centers' and shows the 'Call Center Edit' page for 'Cloud Phone App v2'. The 'General Information' section contains the following fields:

InternalName	LightningCallCenterExpi
Display Name	Cloud Phone App v2
CTI Adapter URL	https://rcsfl.na35.visual
Use CTI API	true
Softphone Height	450
Softphone Width	300
Salesforce Compatibility Mode	Classic_and_Lightning

The 'CTI Adapter URL' field is highlighted with a red box, and a red arrow points to it from the text 'Paste the CTI Adapter URL here'. Below the 'General Information' section is the 'Dialing Options' section with the following fields:

Outside Prefix	9
Long Distance Prefix	1
International Prefix	01

At the bottom of the page, there are 'Save' and 'Cancel' buttons.

Figure 13

Note: If you are not using a custom URL, follow the same steps and make sure the Salesforce POD# the Call Center URL (na35 in this example) matches with Call Center where Salesforce Org resides. Your Salesforce POD# is specified in the browser address bar after your login to Salesforce.

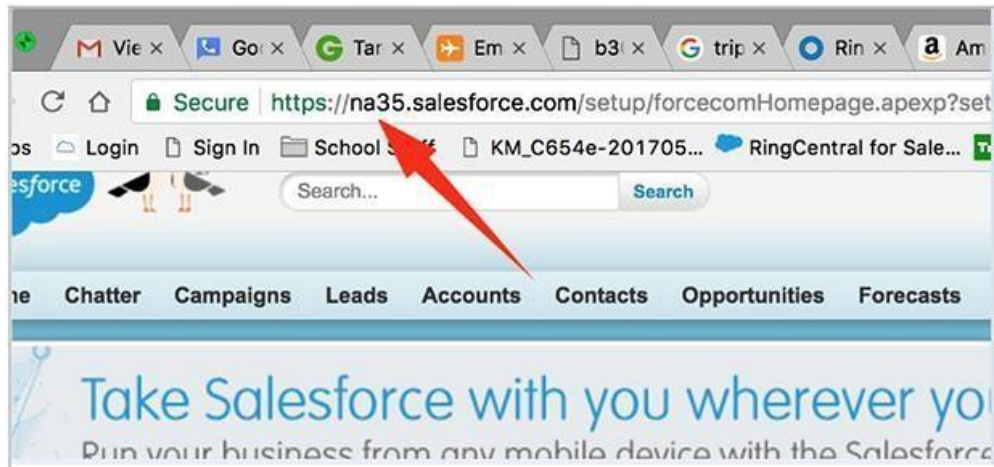


Figure 14

Step 3: Add Users to the Call Center.

Navigate to **Setup Home > Call Centers** and click **Continue**.

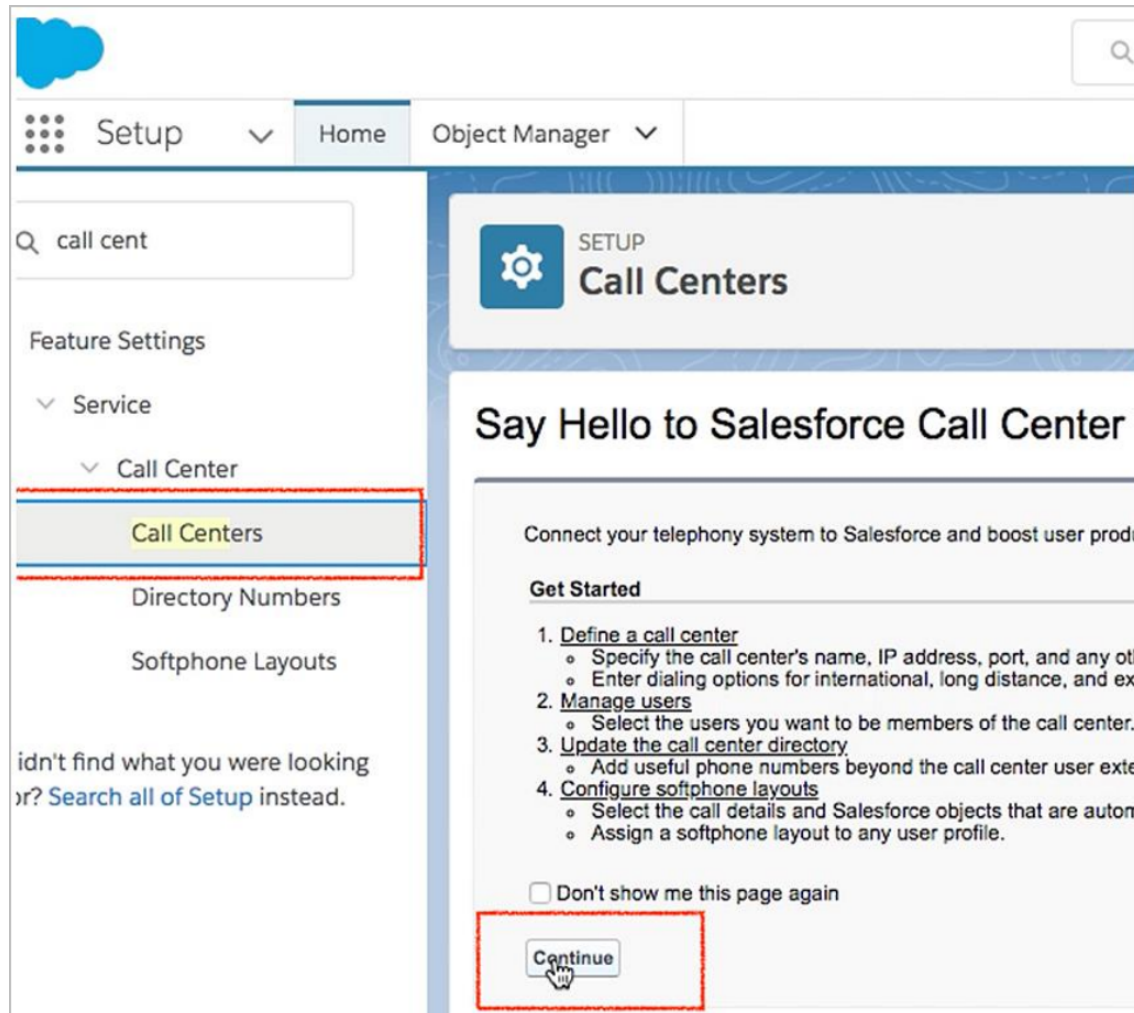


Figure 15

Select the call center and click on **Cloud Phone App v2**. Please note the name could be different, say **Cloud Phone App** depending on the Salesforce.

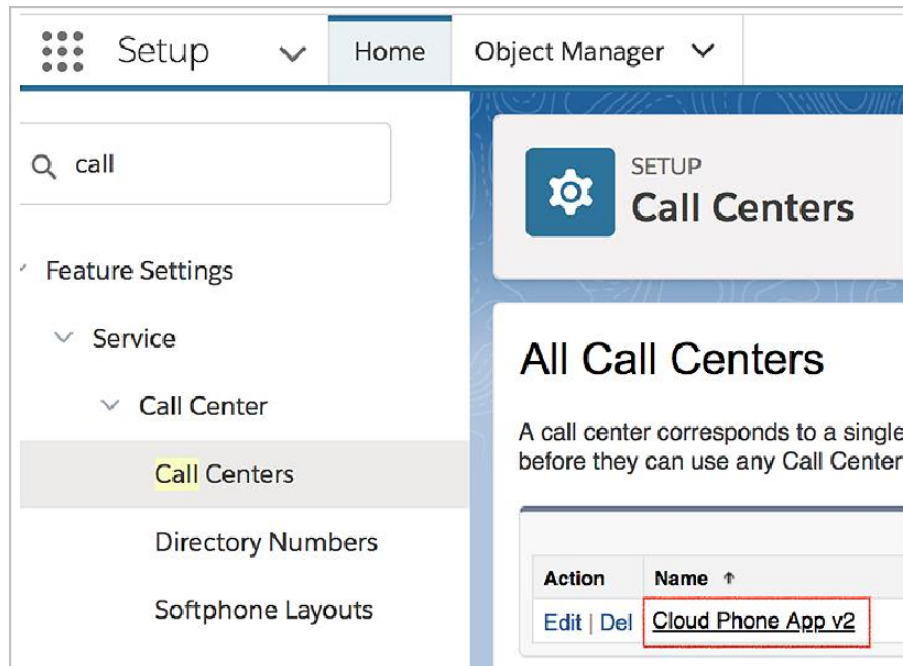


Figure 16

Upon clicking **Cloud Phone App v2**, you will see the Call Center details (Figure 18). It is not necessary to edit this Call Center definition. From here, you can add users to this Call Center using the **Manage Call Center Users** button, which opens the Manage Users screen. (Figures 17–19)

Note: If your users are already added to another call center, remove them first from that call center before you try to add them in the Cloud Phone.

The screenshot shows the Salesforce Lightning Setup interface. The left sidebar contains the 'Setup' menu with 'Home' and 'Object Manager' tabs. Below the menu is a search bar for 'call centers' and a list of feature settings including 'Service' and 'Call Center'. The main content area is titled 'Call Centers' and displays details for 'Cloud Phone App v2'. The details are organized into sections: 'General Information' and 'Dialing Options'. The 'General Information' section includes fields for 'InternalName', 'Display Name', 'CTI Adapter URL', 'Use CTI API', 'Softphone Height', 'Softphone Width', and 'Salesforce Compatibility Mode'. The 'Dialing Options' section includes fields for 'Outside Prefix', 'Long Distance Prefix', and 'International Prefix'. At the bottom of the page, there is a 'Call Center Users' section with a button labeled 'Manage Call Center Users' highlighted by a red box.

Setup

Home Object Manager

Search Setup

call centers

Feature Settings

Service

Call Center

Call Centers

Didn't find what you're looking for? Try using Global Search.

SETUP

Call Centers

Call Center

Cloud Phone App v2

All Call Centers » Cloud Phone App v2

Call Center Detail

Edit Delete Clone

General Information

InternalName	LightningCallCenterExport
Display Name	Cloud Phone App v2
CTI Adapter URL	https://c.na78.visual.force.com/apex/OpenCTIIndex
Use CTI API	true
Softphone Height	450
Softphone Width	300
Salesforce Compatibility Mode	Classic_and_Lightning

Dialing Options

Outside Prefix	9
Long Distance Prefix	1
International Prefix	01

Call Center Users

Manage Call Center Users

Figure 17

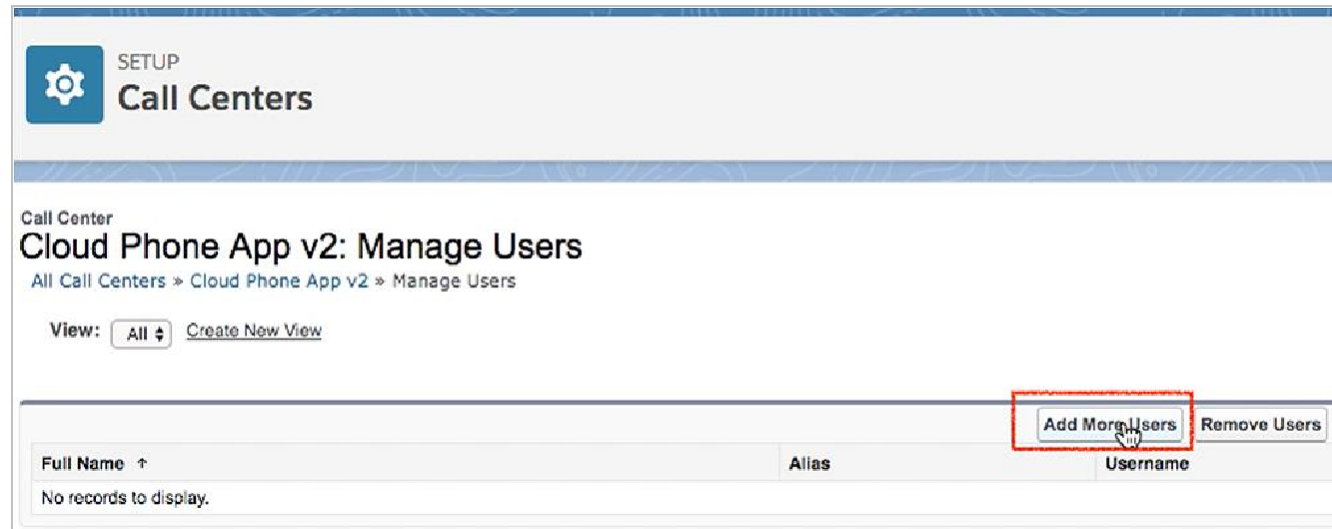


Figure 18

Select the users you wish to add to the call center.

SETUP
Call Centers

Call Center
Cloud Phone App v2: Search for New Users
All Call Centers » Cloud Phone App v2 » Manage Users » Search for New Users

Set the search criteria below and then click Search to find salesforce.com users who should be en.

--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Filter By Additional Fields (Optional):

- You can use "or" filters by entering multiple items in the third column, separated by commas.
- For date fields, enter the value in following format: 5/14/2018
- For date/time fields, enter the value in following format: 5/14/2018 5:28 PM

Find

Figure 19

Setting up SoftPhone Layouts in Salesforce

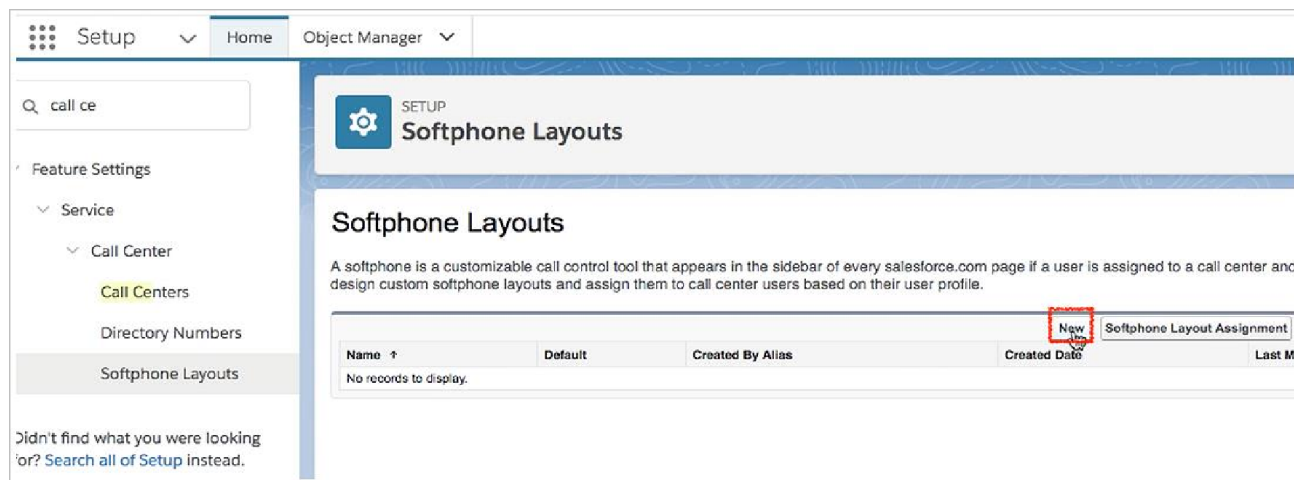
By default, the integration supports standard matching with the Account (and person account), Contact, Lead, Case, and Opportunity objects. The ability to match a phone number to a Salesforce record improves making and logging calls. When there's an incoming or outgoing call, the RingCentral for Salesforce adapter matches the record in Salesforce and pulls up the relevant record in the **Name** and **Related To** fields in Salesforce. Matching is supported for all objects with a 'Phone' type field in Salesforce, including custom objects. The following are the supported entities for the Phone field:

- Call dialer
- Call history list
- Call log page
- Message history list
- Compose SMS
- SMS conversation

Custom objects allow you more flexibility to configure your phone number matching logic as needed. With custom objects, you can configure the integration to match any custom objects you create in Salesforce to be matched and pulled up in the **Related To** field of the call log, so that you can log the call with the matching custom object. The custom objects should have the **Phone** field populated with a number for the match to succeed.

Step 1: Set up a SoftPhone Layout

Navigate to **Setup > Customize > Call Center > SoftPhone Layouts** from the left-hand side menu, and click the **New** button.



The screenshot shows the Salesforce Setup interface. On the left, the navigation menu is expanded to 'Call Center', and 'Softphone Layouts' is selected. The main content area is titled 'Softphone Layouts' and includes a description: 'A softphone is a customizable call control tool that appears in the sidebar of every salesforce.com page if a user is assigned to a call center and design custom softphone layouts and assign them to call center users based on their user profile.' Below the description is a table with columns: Name ↑, Default, Created By Alias, Created Date, and Last Modified. A 'New' button is highlighted with a red box in the top right corner of the table area. The table currently displays 'No records to display.'

In the **Name** field, fill in **RingCentral SoftPhone Layout** and select the **Is Default Layout** checkbox if you want this layout to be the default for all users.

SETUP
Softphone Layouts

Softphone Layout Edit Help for this Page ?

Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layouts to user profiles by clicking Layout Assignment in the Softphone Layouts page.

[Save](#) [Cancel](#)

Name **RingCentral SoftPhone I** ☒ Is Default Layout

Select Call Type **Inbound**

Softphone Layout Help about this section ?

Display these call-related fields:

- ▶ Caller ID, Dialed Number [Edit](#)

Display these salesforce.com objects:

- ▶ Account, Contact, Lead [Add / Remove Objects](#)

▶ **If single Account found, display:** Account Name
If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed. [Edit](#)

▶ **If single Contact found, display:** Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed. [Edit](#)

Figure 21

Also, select the other Softphone layout options.

SETUP
Softphone Layouts

Softphone Layout Edit

Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layouts to user

Name ☐ Is Default Layout

Select Call Type

Softphone Layout

Display these call-related fields:

- ▶ Caller ID, Dialed Number

Display these salesforce.com objects:

- ▶ Account, Contact, Lead

- ▶ If single Account found, display: Account Name
If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
- ▶ If single Contact found, display: Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
- ▶ If single Lead found, display: Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

Screen Pop Settings

- ▶ Screen pops open within: Existing browser window

Figure 22

In Screen Pop Settings:

- In the first set, **Screen pops open within**, choose whether you'd like screen pops to appear in a new window or overwrite the existing Salesforce.com window when a new call arrives.
- For the second set, **No matching records**, if you'd like a new record to be created if there's no match on an inbound call, select the **Pop to new** option and from the dropdown, select the appropriate object you would like to be created when there is an incoming call from a number which does not match an existing record.
- In the third set, **Single-matching record**, select the **Pop detail page** option.
- In the fourth set, **Multiple-matching records**, select the **Pop to search page** option.

Now click the **Save** button at the top.

Screen Pop Settings [Help about this section ?](#)

▼ **Screen pops open within:** New browser window or tab [Collapse](#)

☐ Existing browser window

☒ New browser window or tab

▼ **No matching records:** Pop to new Contact [Collapse](#)

☐ Don't pop any screen

☒ Pop to new Contact

☐ Pop to Visualforce page

▼ **Single-matching record:** Pop detail page [Collapse](#)

☐ Don't pop any screen

☒ Pop detail page

☐ Pop to Visualforce page

▼ **Multiple-matching records:** Pop to search page [Collapse](#)

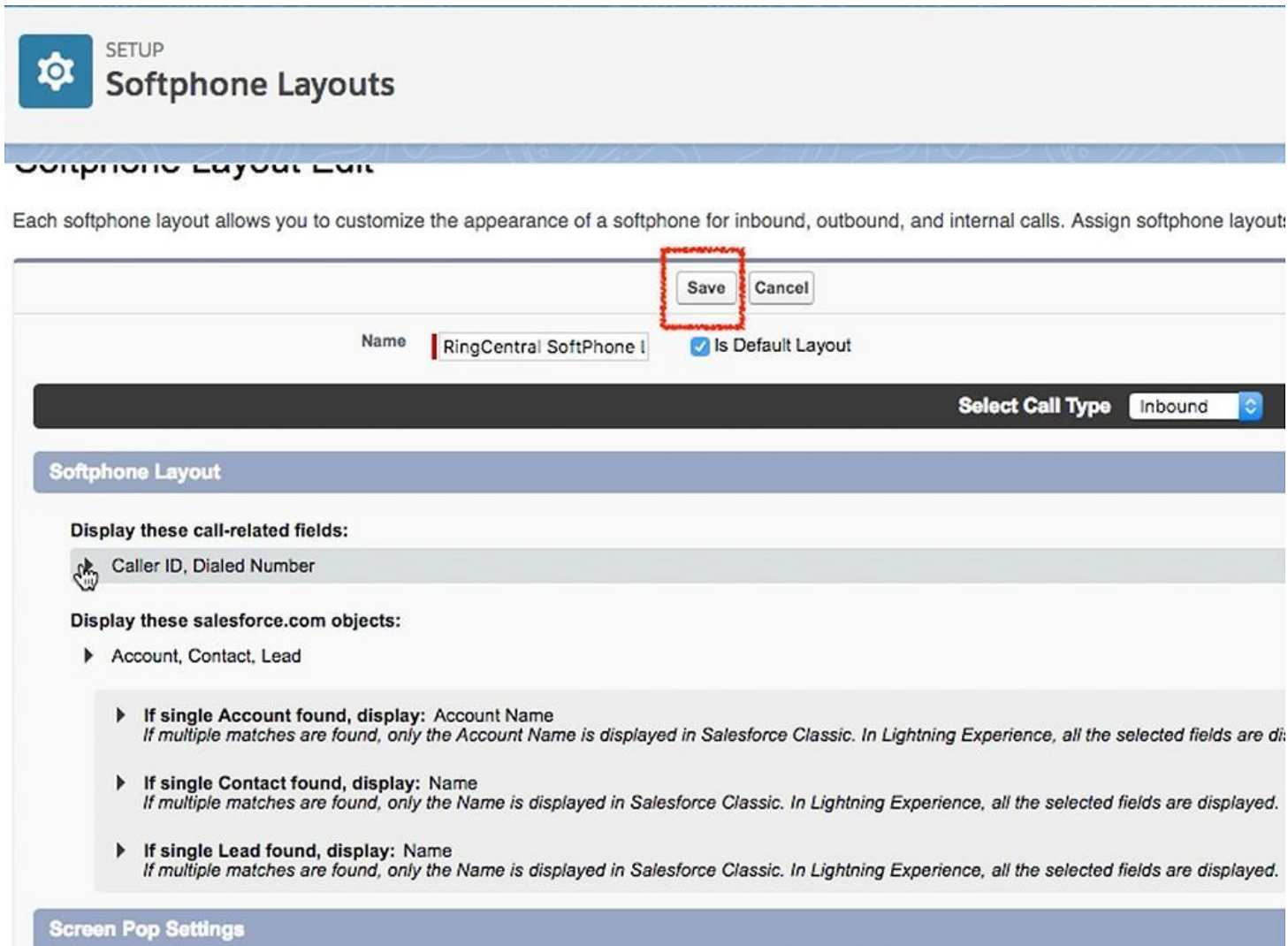
☐ Don't pop any screen

☒ Pop to search page

☐ Pop to Visualforce page

Figure 23

Click **Save** to save the Softphone layout.



SETUP
Softphone Layouts

Each softphone layout allows you to customize the appearance of a softphone for inbound, outbound, and internal calls. Assign softphone layout:

Save **Cancel**

Name **RingCentral SoftPhone I** ☒ Is Default Layout

Select Call Type **Inbound**

Softphone Layout

Display these call-related fields:

☒ Caller ID, Dialed Number

Display these salesforce.com objects:

▶ Account, Contact, Lead

▶ **If single Account found, display:** Account Name
If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

▶ **If single Contact found, display:** Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

▶ **If single Lead found, display:** Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

Screen Pop Settings

Step 2: Add custom objects to a SoftPhone layout (optional).

To use custom objects, enable the feature in the matching configuration settings, and add the custom objects in the SoftPhone layout inbound settings.

1. In the [AdminUI](#), navigate to **Cloud Phone Settings > Settings for Matching Caller Details**, select **Custom Object Support**, and click **Save**.
2. Go back to the **Softphone Layouts** page and edit the layout from the **Edit** link in the **Action** column.
3. Select the *Inbound* call type from the **Select Call Type** menu.
4. Edit the target record type. Click **Add/Remove Objects** to edit the target match list in the current org.

Display these salesforce.com objects:


▼ Molly's Test Custom Object, Case, Account, Account, Contact [Collapse](#)

Available		Selections
AdminUISetting		Molly's Test Custom Object
Call History		Case
Campaign		Account
Customer 1	2	Account
Event	Add	Contact
Iacon_test	Remove	
Icon_test		
Integration App		
Lead		
Opportunity		
Person Account		
RingCentral Logger		
SF - CustomObject - Call History		
Student		

1 Select a record type

2 Add to selection

5. Click **Edit** for each record type to configure the primary field to be shown in the CTI.

 **SETUP**
Softphone Layouts

Caller ID, Dialed Number

Edit

Display these salesforce.com objects:

▶ Molly's Test Custom Object, Case, Account, Account, Contact

[Add / Remove Objects](#)

▶ **If single Molly's Test Custom Object found, display:** M_describe, Molly's CustomObject Name
If multiple matches are found, only the Molly's CustomObject Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

Edit

▶ **If single Case found, display:** Subject, Case Number
If multiple matches are found, only the Case Number is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

Edit

▶ **If single Account found, display:** Account Name
If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

Edit


▶ **If single Account found, display:** Account Name
If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

Edit

▶ **If single Contact found, display:** Phone, Name
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

Edit

The first field in the selection box will be considered the primary field, and the phone user interface will show its value.


Softphone Layouts

Display these salesforce.com objects:

▶ Molly's Test Custom Object, Case, Account, Account, Contact
 [Add / Remove Objects](#)

▼ **If single Molly's Test Custom Object found, display:** Molly's CustomObject Name, M_describe [Collapse](#)

Available		Selections
M_Phone	<div>Add</div> <div>Remove</div>	<div>Molly's CustomObject Name</div> <div>M_describe</div> <div> <div>Up</div> <div>Down</div> </div>

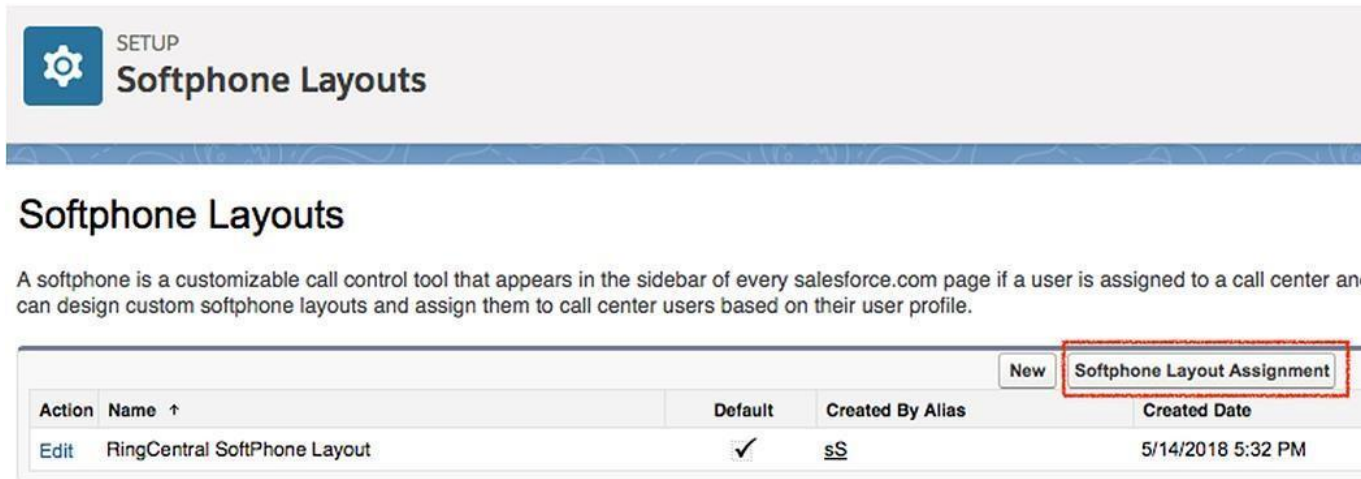
If multiple matches are found, only the Molly's CustomObject Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

▶ **If single Case found, display:** Subject, Case Number [Edit](#)
If multiple matches are found, only the Case Number is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

▶ **If single Account found, display:** Account Name [Edit](#)
If multiple matches are found, only the Account Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

Step 3: Assign the Softphone Layout to Users.

Go back to the **Softphone Layouts** page and click the **Softphone Layout Assignment**.



SETUP

Softphone Layouts

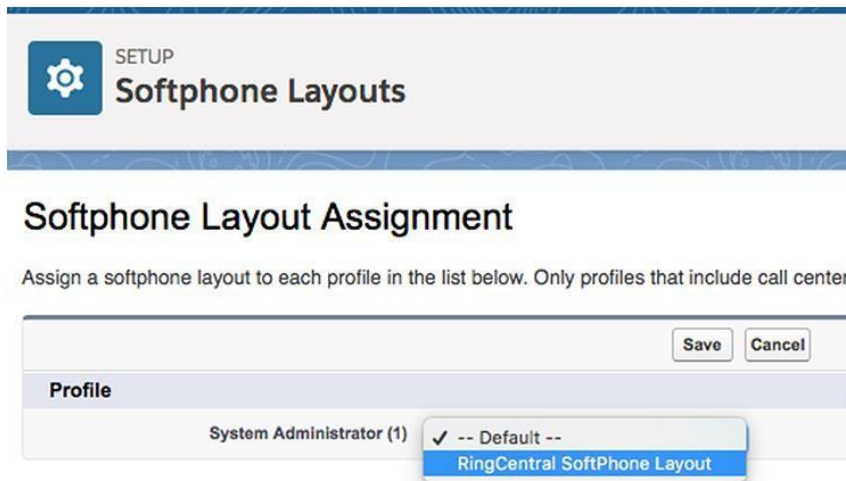
A softphone is a customizable call control tool that appears in the sidebar of every salesforce.com page if a user is assigned to a call center and can design custom softphone layouts and assign them to call center users based on their user profile.

Action	Name ↑	Default	Created By Alias	Created Date
Edit	RingCentral SoftPhone Layout	✓	sS	5/14/2018 5:32 PM

New Softphone Layout Assignment

Figure 25

Assign the Softphone Layout to the relevant profiles.



SETUP

Softphone Layout Assignment

Assign a softphone layout to each profile in the list below. Only profiles that include call center

Profile
System Administrator (1)

Save Cancel

✓ -- Default --
RingCentral SoftPhone Layout

Figure 26

Note: According to the [Open CTI Developer Guide](#), “Open CTI for Lightning Experience doesn’t support the softphone layout field **Screen pops open within** when the value is **New browser window or tab**. In Lightning Experience, the default Open CTI for Lightning value is **Existing browser window**.”

Enabling RingCentral Video Meetings through Global Action

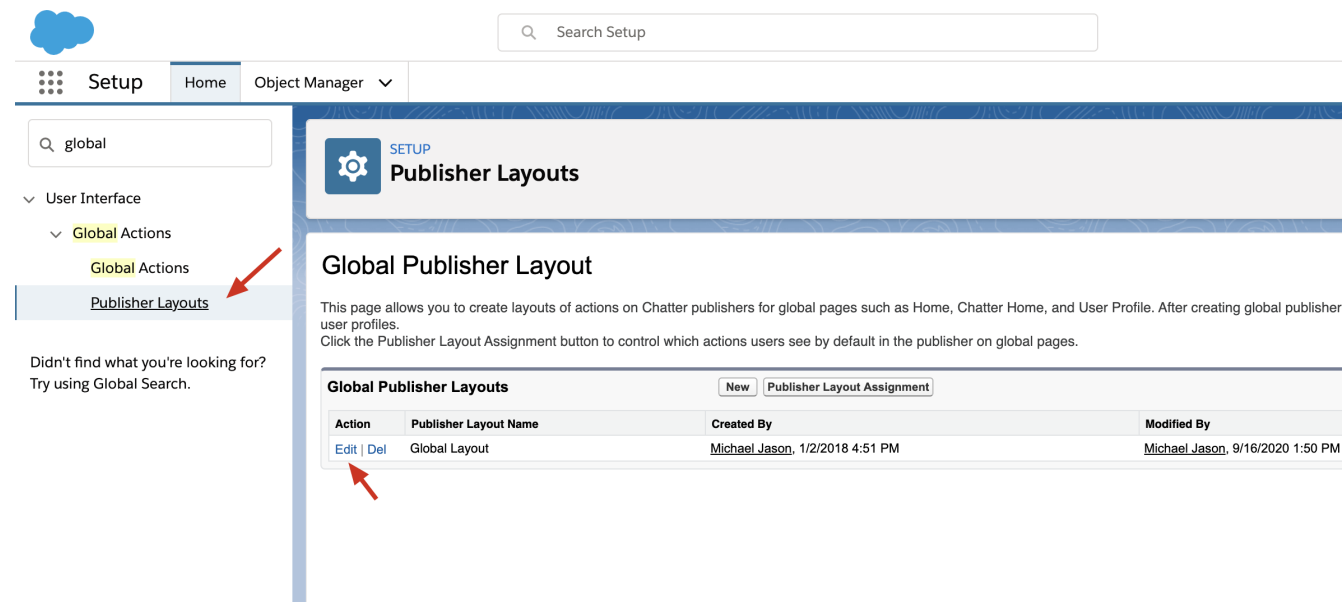
Setting up Global Action Layout in Salesforce

RingCentral Video features had been introduced from RingCentral for Salesforce v6.9.0 to improve efficiency. Following these setups, your org's end users could now START and SCHEDULE RingCentral Video meetings easily from Global Action.

Step 1: Navigate to Global Action Layout configurator

Navigate to **Setup > Home > User Interface > Global Actions > Publisher Layouts**.

Choose the Layout that you want to configure, click **Edit**.



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'global' entered. Below it, the navigation menu is expanded to 'User Interface' > 'Global Actions' > 'Publisher Layouts', with a red arrow pointing to 'Publisher Layouts'. The main content area is titled 'Global Publisher Layout'. It contains a description: 'This page allows you to create layouts of actions on Chatter publishers for global pages such as Home, Chatter Home, and User Profile. After creating global publisher user profiles. Click the Publisher Layout Assignment button to control which actions users see by default in the publisher on global pages.' Below this is a table titled 'Global Publisher Layouts' with buttons 'New' and 'Publisher Layout Assignment'. The table has four columns: 'Action', 'Publisher Layout Name', 'Created By', and 'Modified By'. There is one row with the following data: 'Edit | Del' (links), 'Global Layout', 'Michael Jason, 1/2/2018 4:51 PM', and 'Michael Jason, 9/16/2020 1:50 PM'. A red arrow points to the 'Edit' link in the first column of this row.

Step 2 Configure the Layout

Click the Mobile and Lightning Actions, drag the **Start RingCentral Video meeting** and **Schedule RingCentral Video meeting** to the **Salesforce Mobile and Lightning Experience Actions** list.

Reorder the list as you need.

Click **Save**.

Search Setup

Setup Home Object Manager

global

User Interface

Global Actions

Global Actions

Publisher Layouts

Didn't find what you're looking for?
Try using Global Search.

SETUP Publisher Layouts

Global Layout

Save Quick Save Cancel Undo Redo Layout Properties

Quick Find Mobile Action Name

Quick Actions

Mobile & Lightning Actions

Email	Mobile Smart Actions	New Event	New Opportunity	Post
File	New Account	New Group	New Task	Question
Link	New Case	New Lead	openCTI	Schedule RingCent...
Log a Call	New Contact	New Note	Poll	Start RingCentral...

Global Publisher

Quick Actions in the Salesforce

Classic Publisher

Post File New Event New Task New Contact Log a Call New Opportunity

New Case New Lead Link Poll Question Email

Salesforce Mobile and Lightning

Experience Actions


Post File New Event New Task New Contact Log a Call New Opportunity

New Case New Lead Link Poll Question Email

The screenshot displays the Salesforce Setup interface for configuring Publisher Layouts. The left sidebar shows the navigation menu with 'Publisher Layouts' selected. The main content area shows the 'Global Publisher' configuration. Under 'Quick Actions in the Salesforce', there are two sections: 'Classic Publisher' and 'Salesforce Mobile and Lightning Experience Actions'. The 'Salesforce Mobile and Lightning Experience Actions' section is highlighted with a red box, showing a list of actions including 'Start RingCentral Video meeting' and 'Schedule RingCentral Video meeting'.

Step 3 Assign to roles

Go back to **Publisher Layouts**. If you are trying to assign a specific role with a specific layout, click the **Publisher Layout Assignment**, and configure it.



Setup

Home

Object Manager


User Interface

Global Actions

Global Actions

Publisher Layouts

Didn't find what you're looking for?
Try using Global Search.

 **Publisher Layouts**

Global Publisher Layout

This page allows you to create layouts of actions on Chatter publishers for global pages such as Home, Chatter Home, and User Profile. global publisher layouts, you can assign them to different user profiles. Click the Publisher Layout Assignment button to control which actions users see by default in the publisher on global pages.

Global Publisher Layouts

New

Publisher Layout Assignment

Action	Publisher Layout Name	Created By	Modified By
Edit Del	Global Layout	Michael Jason , 1/2/2018 4:51 PM	Michael Jason , 9/16/2020 1:50 PM

Launch App in Lightning View

Now as your basic installation and configuration is complete it's time to launch the RingCentral for Lightning app. The app can be accessed from the App Launcher.

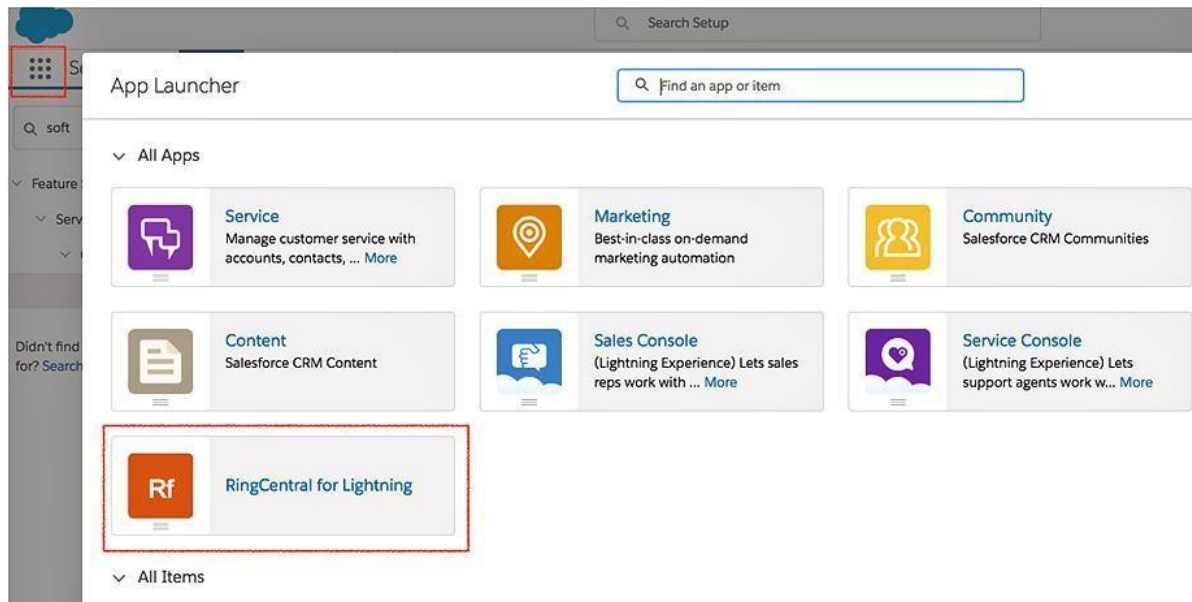


Figure 27

Before launching the RingCentral for Lightning app, log out and re-login.

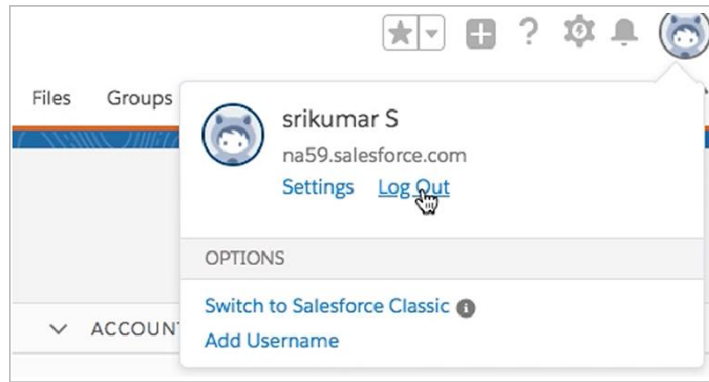


Figure 28

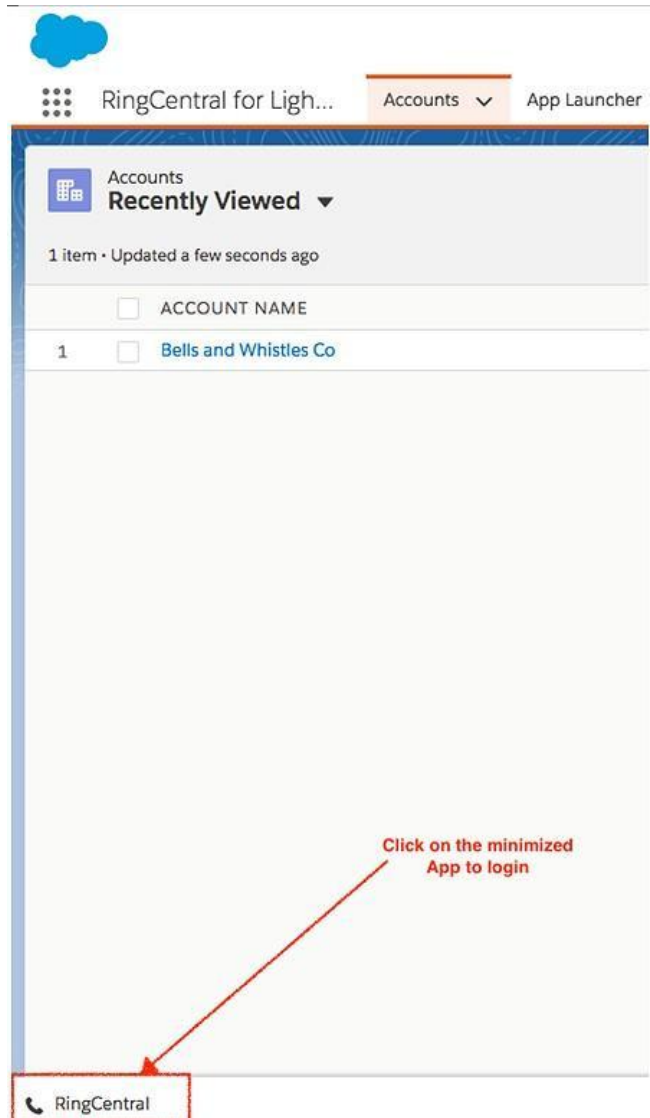


Figure 29

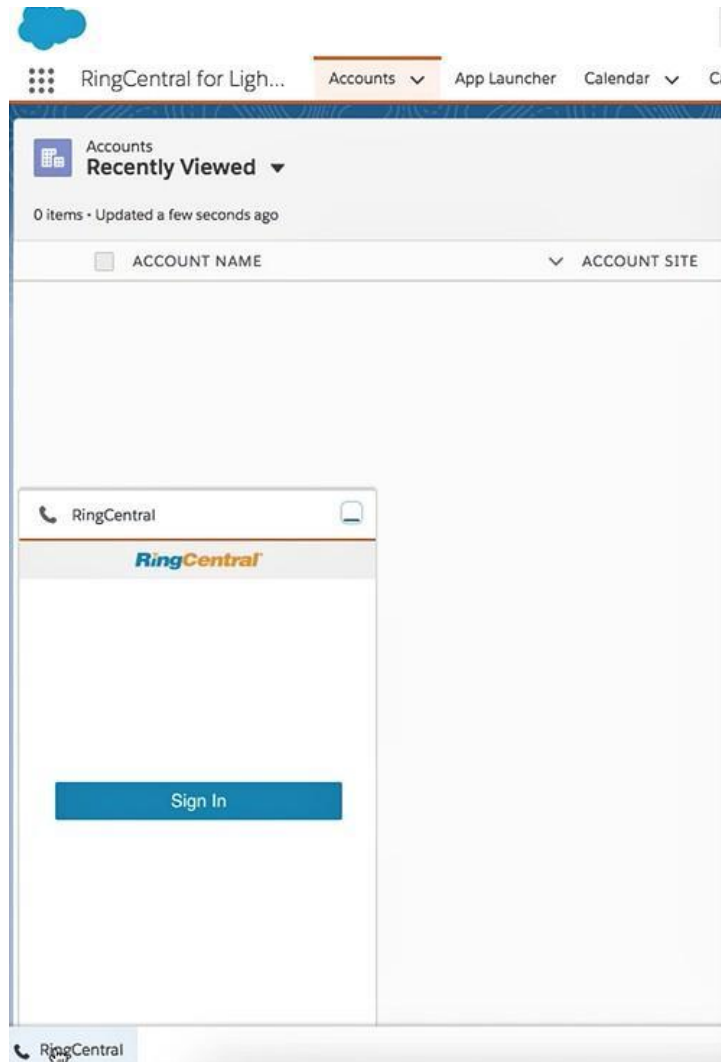


Figure 30

Click the button and you'll see the RingCentral app. After signing in, configure the outbound dialing option in setup.

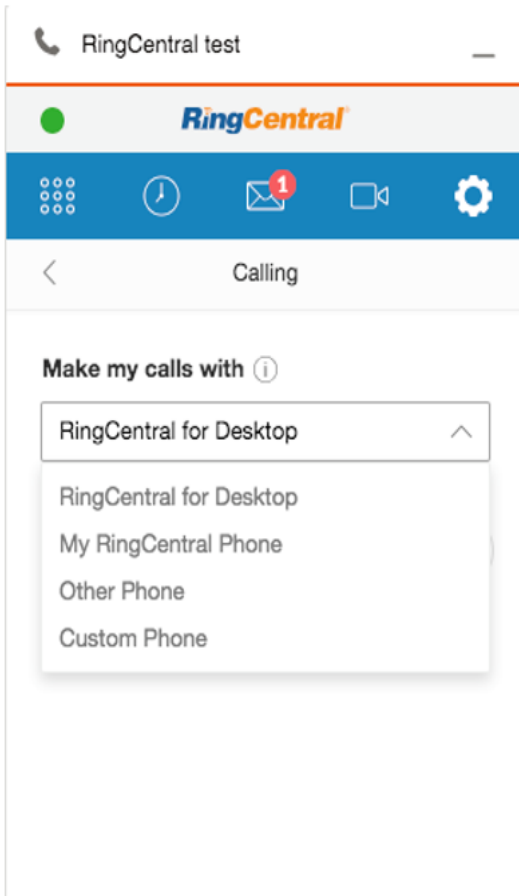


Figure 31

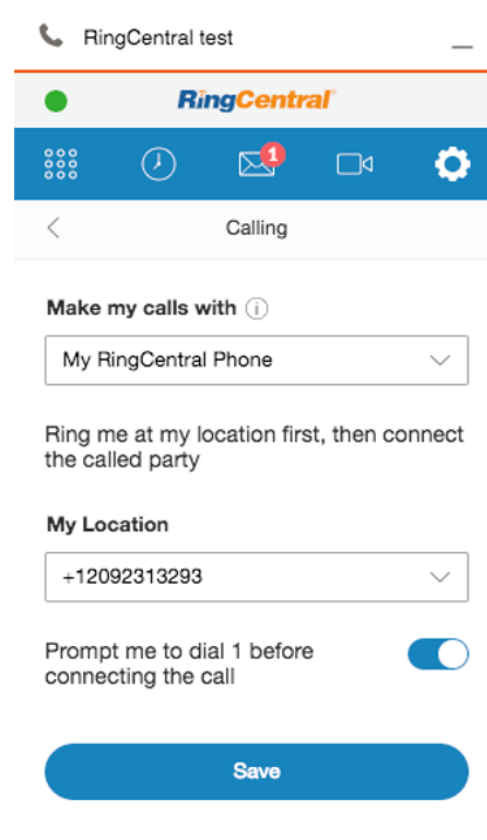


Figure 32

Note: Setup can be configured by each user based on their preference. Refer to the **RingCentral for Salesforce User Guide** in the [AppExchange listing](#).

Important: Note that if **RingCentral for Desktop** is selected above, RingCentral for Salesforce integration will work only with RingCentral Softphone and not the RingCentral App. End users need to install RingCentral softphone from [here](#).

Add Open CTI Softphone to Your Lightning App.


You can add CTI to any of your Lightning apps. Navigate to **All Setup > Apps > App Manager**.

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar contains a navigation menu with the following items: Setup Home, Lightning Experience, ADMINISTRATION (Users, Data, Email), PLATFORM TOOLS (Apps, App Manager, AppExchange Marketplace, Connected Apps, Installed Packages, Mobile Apps, Package Manager, Feature Settings, Einstein, Objects and Fields, Process Automation). The 'App Manager' item is selected. The main content area is titled 'Lightning Experience App Manager' and shows a table of 13 items, sorted by App Name. The table has columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The 'RingCentral for Lightning' app is highlighted in the list.

APP NAME	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED	APP TYPE	VISIBILITY
1 App Launcher	AppLauncher	App Launcher tabs	5/14/2018 5:03 PM	Classic	✓
2 Community	Community	Salesforce CRM Communities	5/14/2018 5:03 PM	Classic	✓
3 Content	Content	Salesforce CRM Content	5/14/2018 5:03 PM	Classic	✓
4 Marketing	Marketing	Best-in-class on-demand marketing automation	5/14/2018 5:03 PM	Classic	✓
5 Platform	Platform	The fundamental Lightning Platform	5/14/2018 5:03 PM	Classic	✓
6 RingCentral for Lightning	RingCentral		5/17/2018 11:45 AM	Lightning (Managed)	✓
7 Sales	Sales	The world's most popular sales force automation (SFA) solution	5/14/2018 5:03 PM	Classic	✓
8 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	5/17/2018 3:59 PM	Lightning	✓
9 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	5/14/2018 5:03 PM	Lightning	✓
10 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	5/14/2018 5:03 PM	Classic	✓
11 Service	Service	Manage customer service with accounts, contacts, cases, and more	5/14/2018 5:03 PM	Classic	✓
12 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service channels o...	5/14/2018 5:03 PM	Lightning	✓
13 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and manage content...	5/14/2018 5:03 PM	Classic	✓

Figure 33

Select the Lightning app you wish to add to the RingCentral app, and click **Edit**.


SETUP

Lightning Experience App Manager

New Lightning App
New Connected App

13 items • Sorted by App Name • Filtered by TabSet Type •

APP NAME ↑	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED ...	APP TYPE	VISIBLE IN LIGHT...	
Community	Community	Salesforce CRM Com...	2/2/2017 6:43 PM	Classic	✓	▼
Content	Content	Salesforce CRM Cont...	2/2/2017 6:43 PM	Classic	✓	▼
Marketing	Marketing	Best-in-class on-dem...	2/2/2017 6:43 PM	Classic	✓	▼
Platform	Platform	The fundamental For...	2/2/2017 6:43 PM	Classic		▼
RingCentral for Lightning	RingCentral		2/2/2017 6:54 PM	Lightning (Managed)	✓	▼
Sales	Sales	The world's most pop..	2/2/2017 6:43 PM	Classic		▼
Sales	LightningSales	Manage your sales pr...	2/14/2017 7:21 PM	Lightning	✓	▼
Sales Console	LightningSalesConsole	(Lightning Experienc...	2/14/2017 5:42 PM	Lightning	✓	▼
Salesforce Chatter	Chatter	The Salesforce Chatt...	2/2/2017 6:43 PM	Classic	✓	▼
Service	Service	Manage customer se...	2/2/2017 6:43 PM	Classic	✓	▼

Edit

Figure 34

Open the **Utility Bar** tab and click **Add**.

The screenshot displays the 'Lightning App Builder' interface for configuring the 'Utility Bar'. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Sales'. The left sidebar, under 'APP SETTINGS', lists 'App Details & Branding', 'App Options', 'Utility Bar' (selected), 'Select Items', and 'Assign to User Profiles'. The main content area is titled 'Utility Bar' and includes the instruction 'Give your users quick access to common productivity tools.' Below this, the 'Utility Bar Items' section features an 'Add' button. A 'Phone' utility item is currently selected, showing its properties in a right-hand panel. The properties include: 'Open CTI Softphone' (with up/down arrows and a 'Remove' button), 'Utility Item Properties' (expanded), 'Label' (set to 'Phone'), 'Icon' (set to a phone icon with the text 'call'), 'Panel Width' (set to 340), 'Panel Height' (set to 480), and a checked checkbox for 'Load in background when app opens'.

Figure 35

Select **Open CTI Softphone** from the available list and click it. Click **Save** then click **Done**.

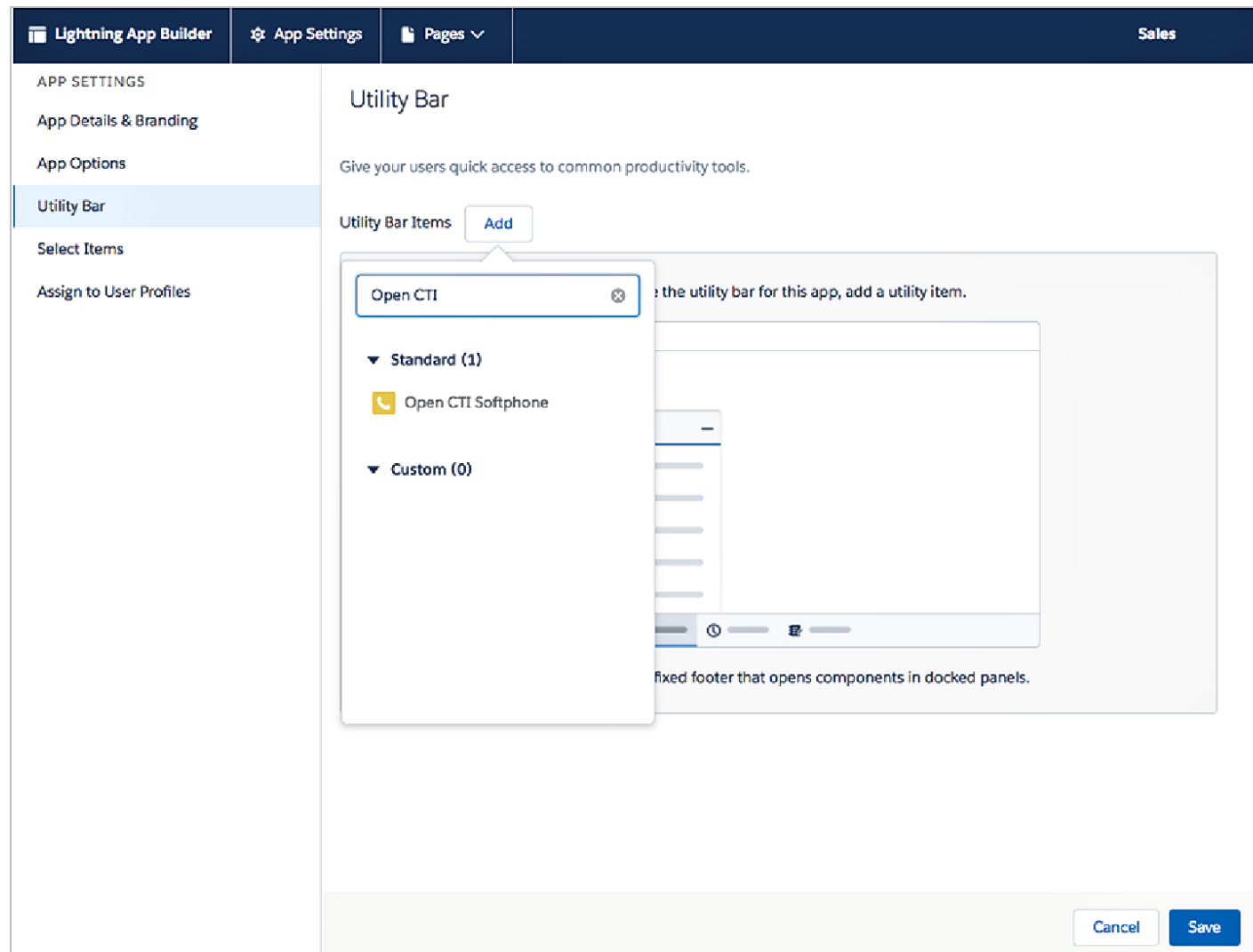


Figure 36

Launch the app from **App Launcher**, and you'll see the RingCentral app in the **Utility Bar**.

Lightning App Builder | **App Settings** | **Pages** | **Sales**

APP SETTINGS

- App Details & Branding
- App Options
- Utility Bar**
- Select Items
- Assign to User Profiles

Utility Bar

Give your users quick access to common productivity tools.

Utility Bar Items [Add](#)

Phone

PROPERTIES

Open CTI Softphone

↑ ↓ Remove

▼ **Utility Item Properties**

Label ?

Phone

Icon ?

call

Panel Width ?

340

Panel Height ?

480

☒ Load in background when app opens ?

Cancel **Save**

Figure 37

Setting up Preset Call Dispositions

RingCentral for Salesforce includes the capability to provide a list of preset call dispositions to your end users to make logging calls quick and easy. These dispositions appear in a dropdown list under the **Subject** area of the call log.

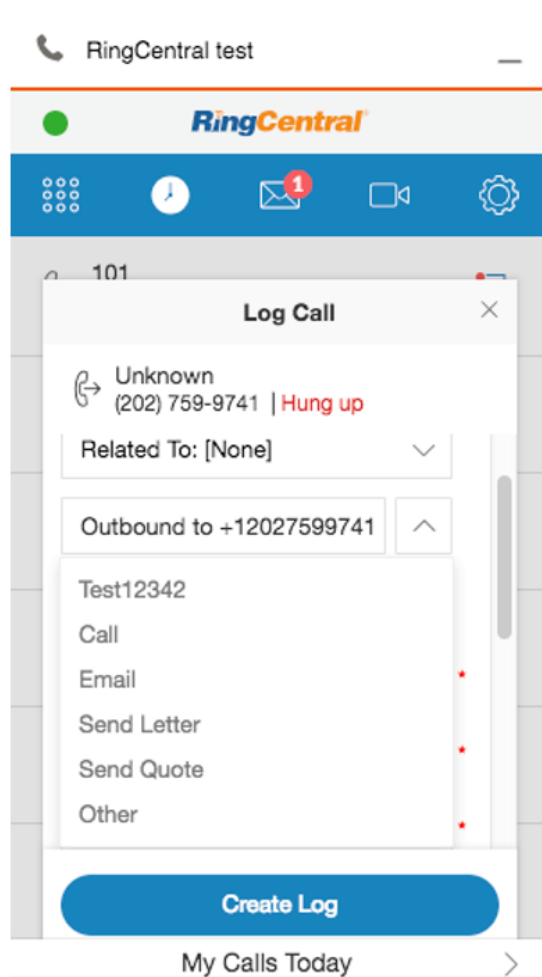


Figure 38

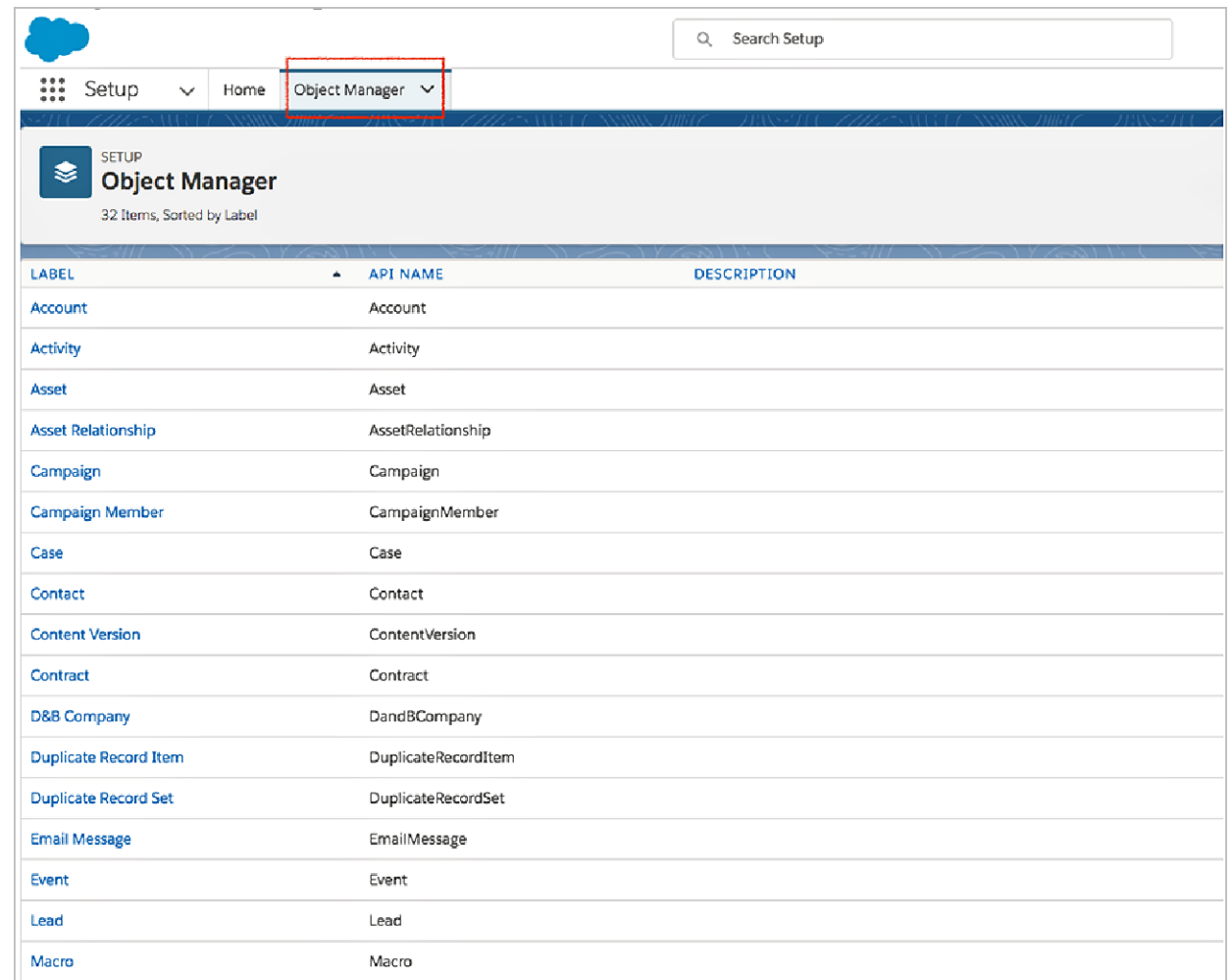


Figure 39

These preset dispositions are gathered from the Subject picklist on the Salesforce.com Task object. To edit these dispositions, navigate to **Setup > Object Manager > Activities > Tasks > Fields & Relationships > Subject**.

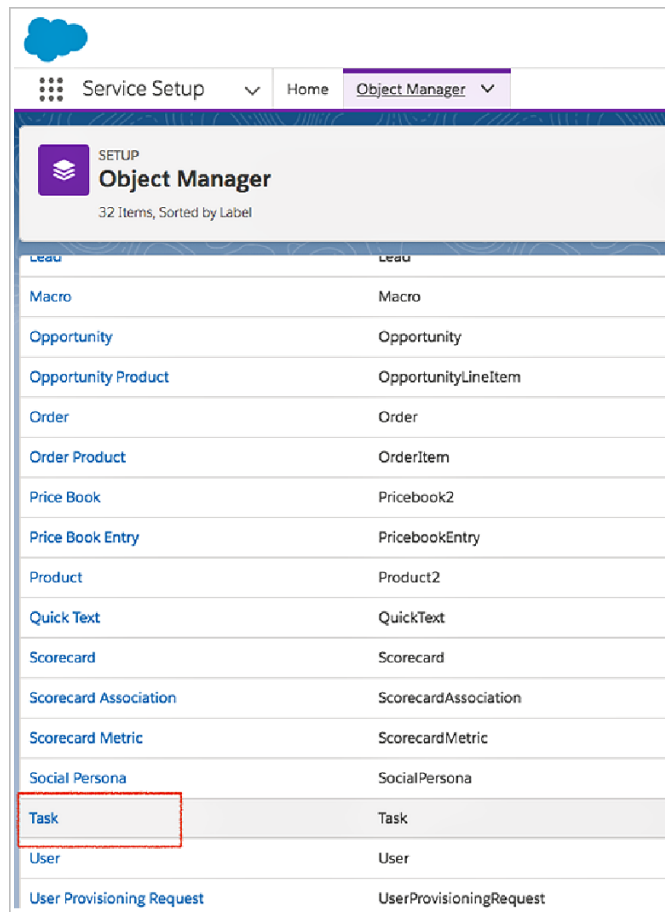


Figure 40

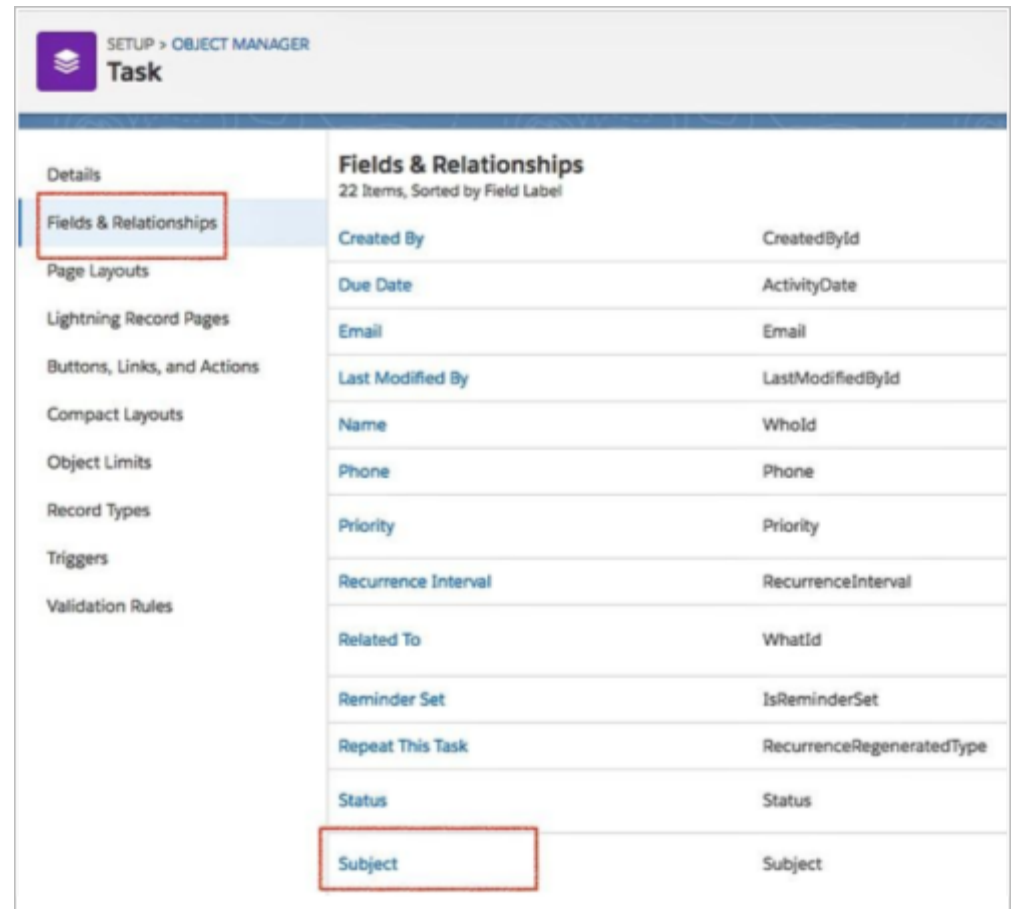


Figure 41

Adding new or editing picklist values here will instantly modify the dispositions available to users.

SETUP > OBJECT MANAGER

Task

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Object Limits

Record Types

Triggers

Validation Rules

Fields & Relationships

22 Items, Sorted by Field Label

Created By	CreatedById
Due Date	ActivityDate
Email	Email
Last Modified By	LastModifiedById
Name	WhoId
Phone	Phone
Priority	Priority
Recurrence Interval	RecurrenceInterval
Related To	WhatId
Reminder Set	IsReminderSet
Repeat This Task	RecurrenceRegeneratedType
Status	Status
Subject	Subject

Figure 42

Share Report Folder with Users

Navigate to the **Reports** tab in Salesforce.

Find the **Cloud Phone Report** folder by clicking on **All Folders** on the left menu.

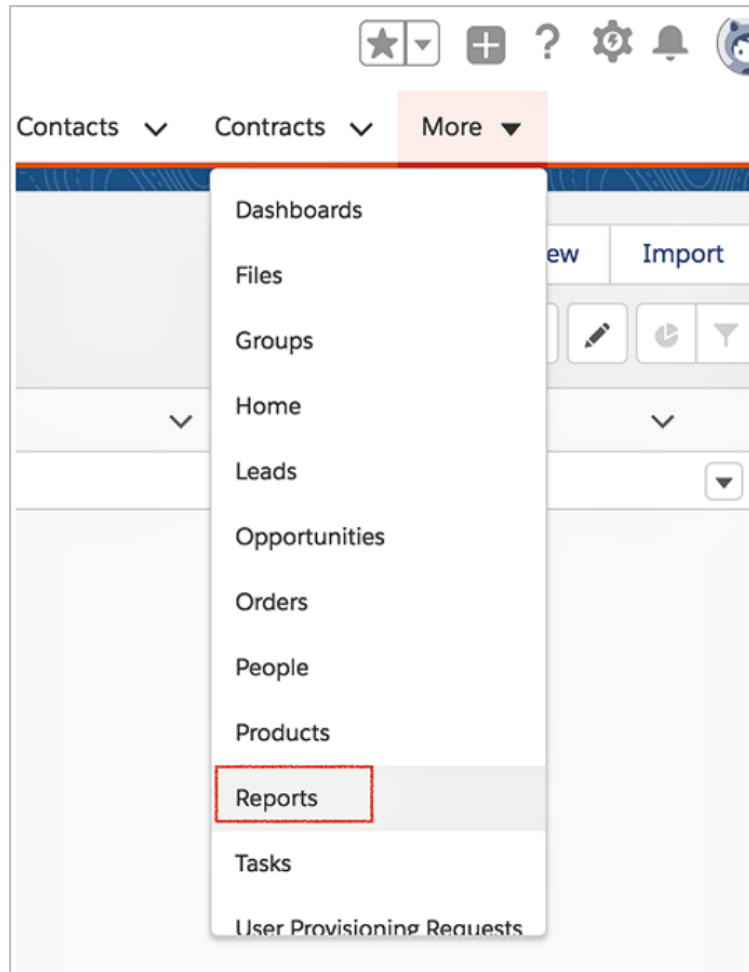


Figure 43

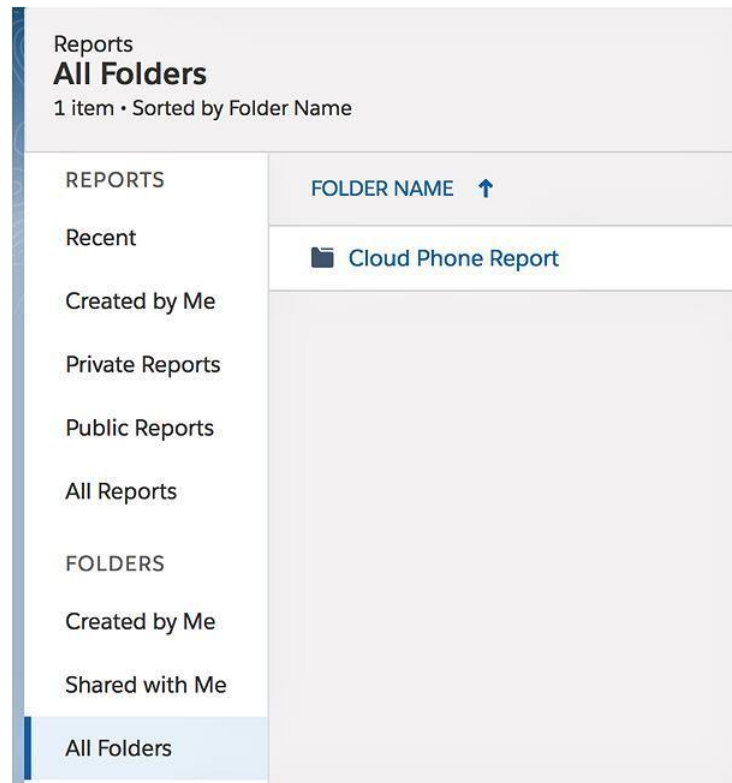


Figure 44

Click on the dropdown on the right of the **Cloud Phone Report** and click **Share**.

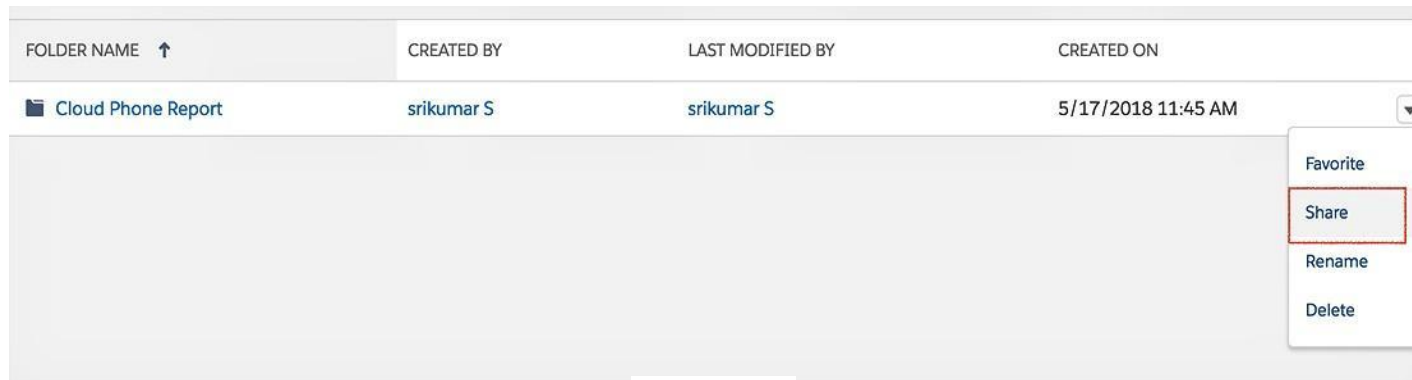


Figure 45

In the new window, select the Users or Roles you want to share the reports with, then click **Done** and **Close**.

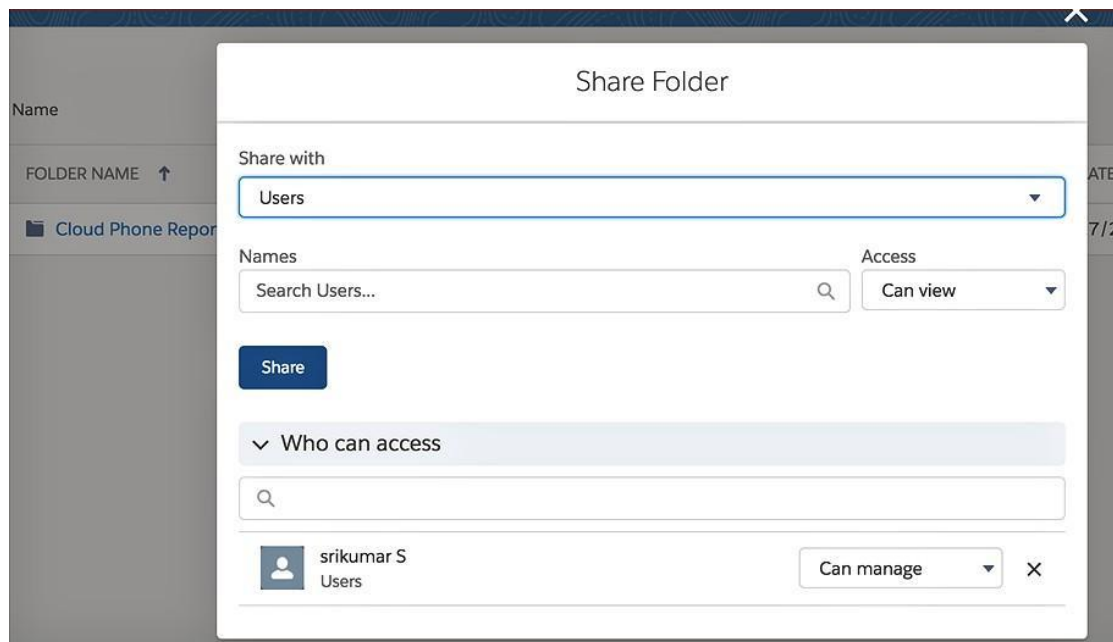


Figure 46

AdminUI

AdminUI is a VisualForce page created for administrators to make organization-wide changes to RingCentral for Lightning app settings. The page is: `/apex/rcsfl_adminUI`.

For example, if your Salesforce instance home page is <https://ap2.salesforce.com/home/home.jsp>, your adminUI URL would be https://ap2.salesforce.com/apex/rcsfl_adminUI. After entering the URL, you'll be prompted to **Please press 'Initialize' to go the AdminUI**.

Cloud Phone Settings

Auto Save Setting

Pop matching Salesforce entity record on call ringing

☐ Auto create call log on ringing

Save

Settings for Matching Caller Details

These settings configures the objects that will be populated in the Name & RelatedTo field in the Call Log.

☒ Standard Match i

☐ Custom Object Support i

Save

Associate Call/SMS Log with Person Account

Associate call/SMS log with Person Accounts using Related to field.

Save

Figure 47

On the **Cloud Phone Settings** page you can access the following:

Auto Save Call Log Setting: Besides the Screen Pop Settings you made in **Setup Home > Softphone Layout**, in this section you can further define when to do the screen pop: whether to pop when an inbound call is ringing or when it's answered.

Also you can define whether to auto-create call logs and when to log them. This setting overrides the settings the user does on the app > **Settings** page.

Settings for Matching Caller Details: allows you to select matching using standard objects or to enable matching of custom objects.

The section **Associate Call Log with Person Account** is hidden by default. If you want to show it you are required to be partners of Salesforce and just open a case asking Salesforce Support to enable person account by providing Organization ID. Go to **Settings > Company Information** and use "Salesforce.com Organization ID" field. (Figure on next page)

Log Customization

Add/remove call log fields by using the left/right arrows and order the selected call log fields by using the up/down arrows. Click **Save** button when call log settings are as expected and refresh the page. The call log UI of the RingCentral for Salesforce app renders these fields in the exact order they are listed in the **Selected Fields** box.

Note:

The field types supported in Call Log are **Lookup Relationship**, **Date**, **Date/Time**, **Picklist**, **Text** and **Text Area**.

The incoming call pop-up on new browser tab is **NOT** working in Lightning mode, but it works well in Classic mode.

Integrations (BETA)

SETTINGS

Company Settings

Business Hours

Calendar Settings

Company Information

Critical Updates

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

Identity

SETUP

Company Information

Edit
Deactivate Org

Organization Name	SKumar & Co	Phone	
Primary Contact	srikumar S	Fax	
Division		Default Locale	English (United States)
Address	US	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT-07:00) Pacific Daylight Time
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Newsletter	<input checked="" type="checkbox"/>	Used Data Space	296 KB (6%) View
Admin Newsletter	<input checked="" type="checkbox"/>	Used File Space	13 KB (0%) View
Hide Notices About System Maintenance	<input type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
		Restricted Logins, Current Month	0 (0 max)
		Salesforce.com Organization ID	00Df4000003khEA
		Organization Edition	Developer Edition
		Instance	NA59
		Modified By	srikumar S, 5/14/2018 5:12 PM

Created By srikumar S, 5/14/2018 5:03 PM

Edit
Deactivate Org

Figure 48

Call Recording

To allow users in your organization to access their RingCentral call recordings from within Salesforce, navigate to **Object Manager > Task > Page Layout**.

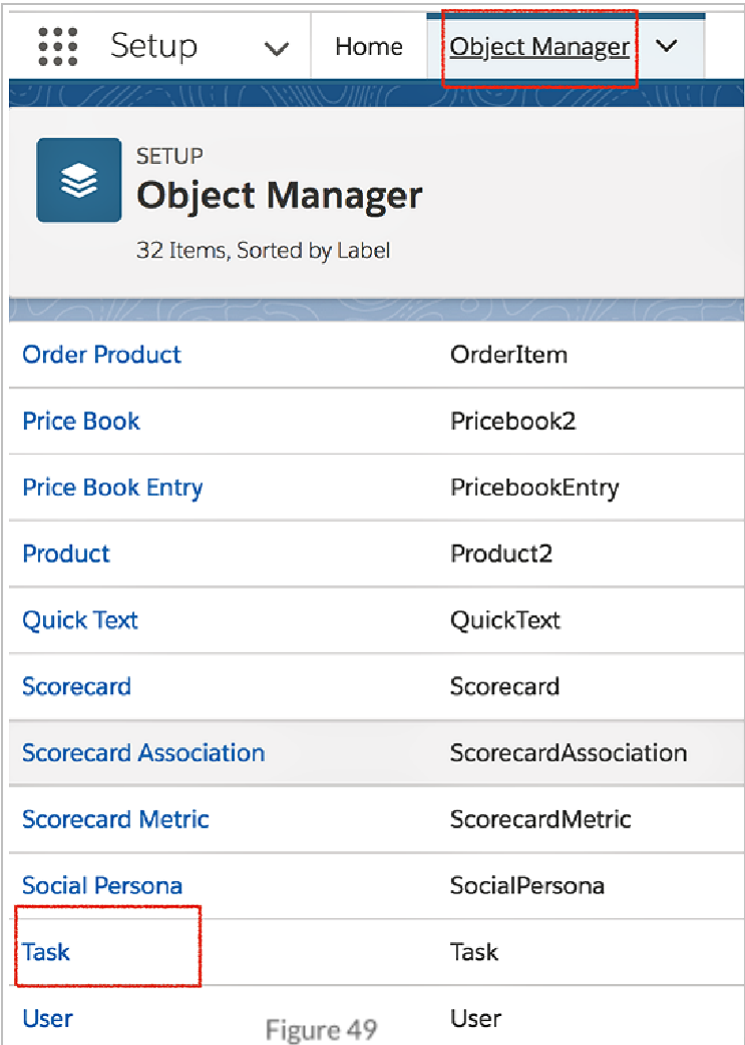


Figure 49

Click **Edit** for the page layout you want to configure.

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Task

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Object Limits

Record Types

Triggers

Page Layouts

1 Items, Sorted by Page Layout Name

Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Task Layout	srikumar S, 5/14/2018, 5:03 PM	srikumar S, 5/17/2018, 6:30 PM

Edit

Delete

Figure 50

Move the **Call Recording** field to the **Task Detail** section.

The screenshot shows the 'Task Layout' editor interface. At the top, there's a 'Task Layout' dropdown and a toolbar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below this is a 'Fields' panel on the left with a 'Quick Find' search bar. The main area displays a grid of fields organized into sections: 'Section', 'Blank Space', 'Assigned To', 'Call Duration', 'Call Object Ident...', 'Call Recording', 'Call Result', 'Comments', 'Created By', 'Date__1', 'Date__time', 'Due Date', 'Email', 'formula-date', 'formula-checkbox', 'Geolocation', 'Hello__a', 'Last Modified By', 'Name', 'Phone', 'PickList_c', 'Priority', 'Public', 'Recurrence Interval', 'Repeat This Task', 'RequiredPick', 'RequiredText', 'Status', 'Subject', 'Task Subtype', and 'Type'. A red arrow points from the 'Call Recording' field in the 'Blank Space' section to the 'Task Detail' section at the bottom. The 'Task Detail' section contains a 'Task Information' header and a list of fields: 'Assigned To' (Sample User), 'Call Object Identifier' (Sample Call Object Identifier), 'Subject' (Sample Subject), 'Due Date' (1/26/2016 11:56 PM), 'Phone' (1-415-555-1212), 'Priority' (Sample Priority), 'hello__a' (www.salesforce.com), 'Status' (Sample Status), 'Name' (Sample Contact), 'Related To' (Sample Contract), 'Email' (sarah.sample@company.com), 'Call Type' (Sample Call Type), and 'Call Duration' (58,659).

Figure 51

Analytics Report

Analytics Report is a key feature that gives your sales leaders complete visibility on their team's performance from a call data perspective. It also gives sales reps insights into their call data.

Prerequisites: Define Hierarchy and Assign Roles to Users in Salesforce

In order to create a team view and individual representative view, navigate to **Setup > Users > Roles**.

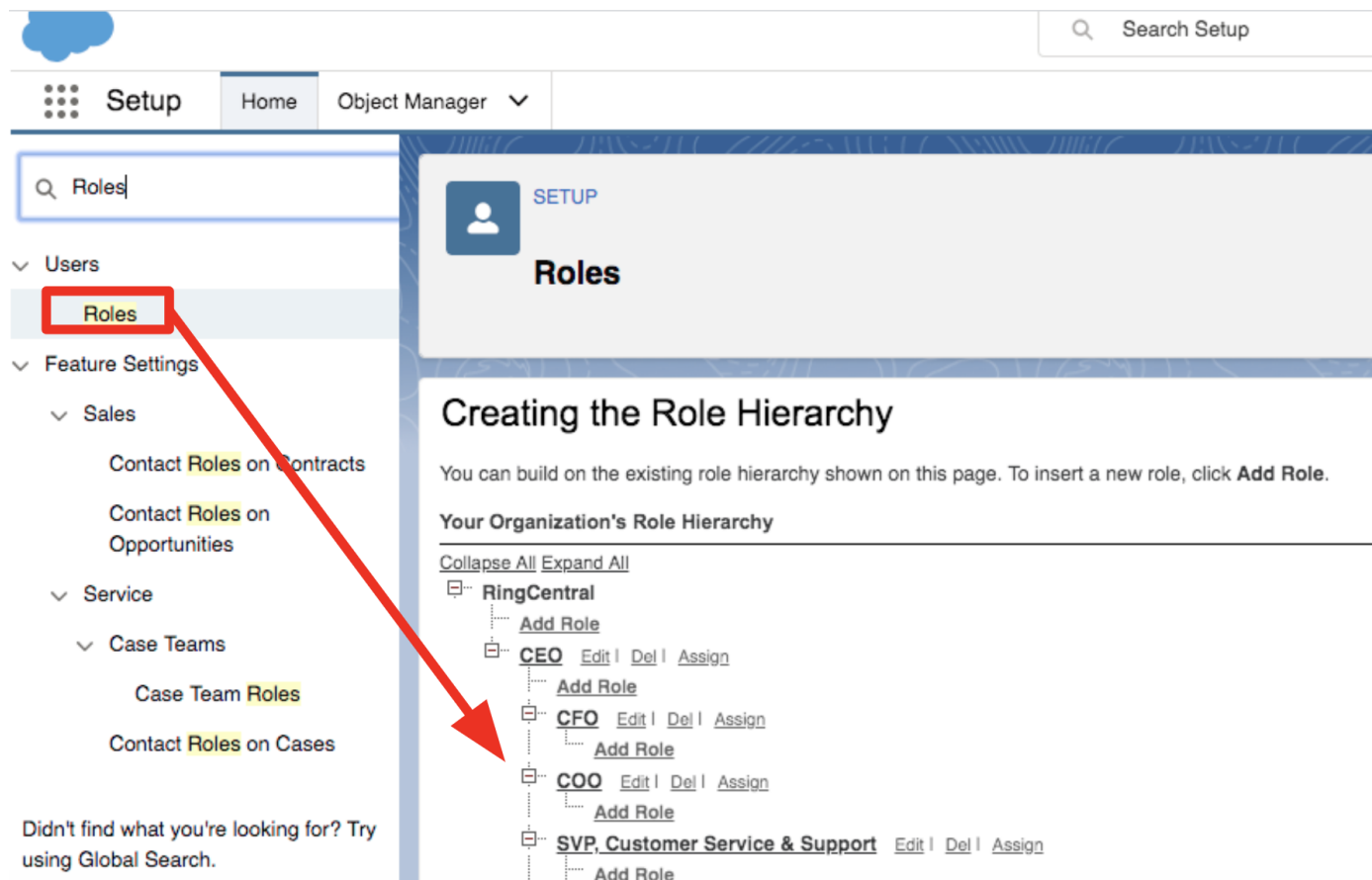
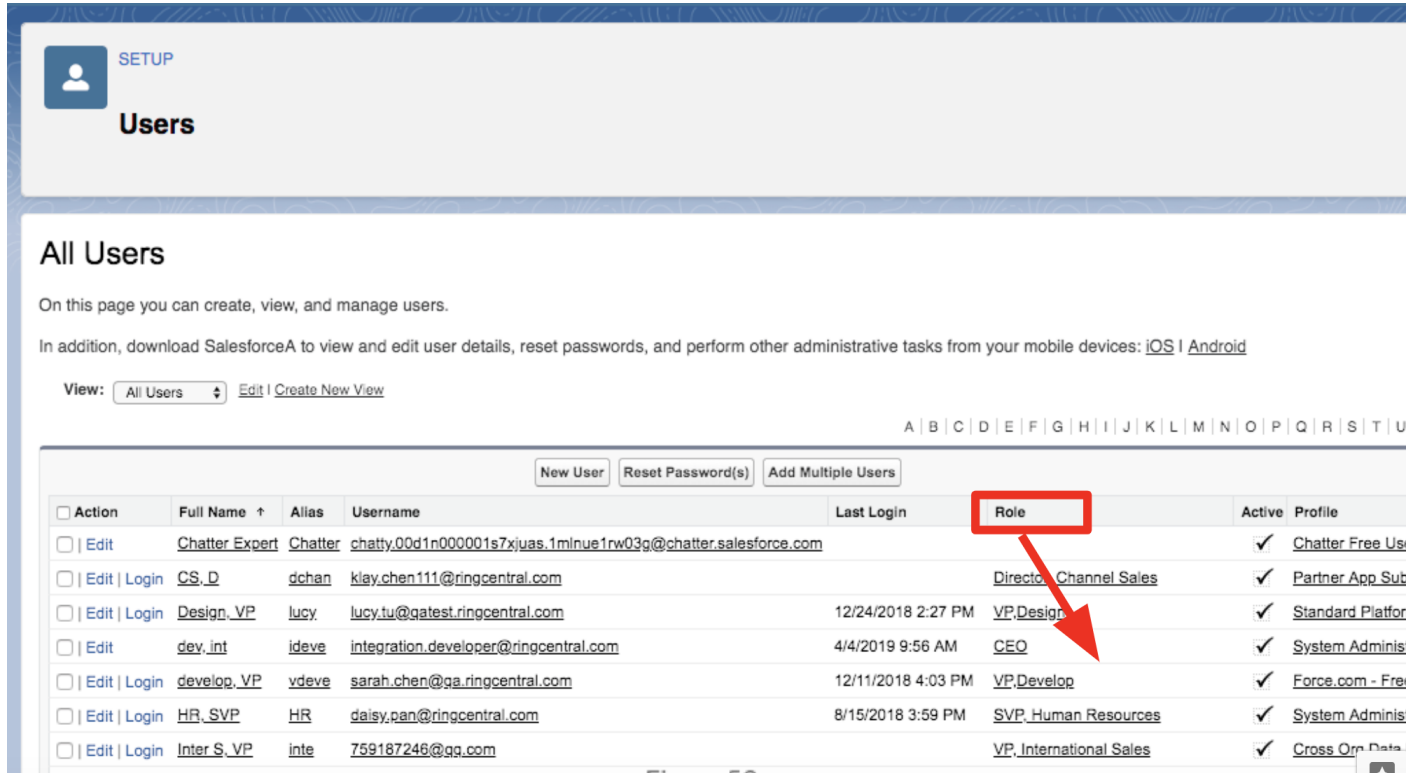


Figure 52

You can define team hierarchy here and assign roles to users.



Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users [Edit](#) | [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d1n000001s7xjuas.1minue1nw03g@chatter.salesforce.com			✓	Chatter Free Us
<input type="checkbox"/> Edit Login	CS_D	dchan	klay.chen111@ringcentral.com		Director, Channel Sales	✓	Partner App Sub
<input type="checkbox"/> Edit Login	Design_VP	lucy	lucy.tu@gatest.ringcentral.com	12/24/2018 2:27 PM	VP.Design	✓	Standard Platfor
<input type="checkbox"/> Edit	dev_int	ideve	integration.developer@ringcentral.com	4/4/2019 9:56 AM	CEO	✓	System Adminis
<input type="checkbox"/> Edit Login	develop_VP	vdeve	sarah.chen@ga.ringcentral.com	12/11/2018 4:03 PM	VP.Develop	✓	Force.com - Fre
<input type="checkbox"/> Edit Login	HR_SVP	HR	daisy.pan@ringcentral.com	8/15/2018 3:59 PM	SVP_Human Resources	✓	System Adminis
<input type="checkbox"/> Edit Login	Inter_S_VP	inte	759187246@gg.com		VP_International Sales	✓	Cross Org Data

Figure 53

Entry for Analytics Report

Analytics reports are available under the **Settings** menu upon clicking the first link labeled **Analytics Reports**. If you have not set up the role hierarchy, it only shows your individual data for the signed-in account. If roles hierarchy is enabled, it shows the data for all the team members.

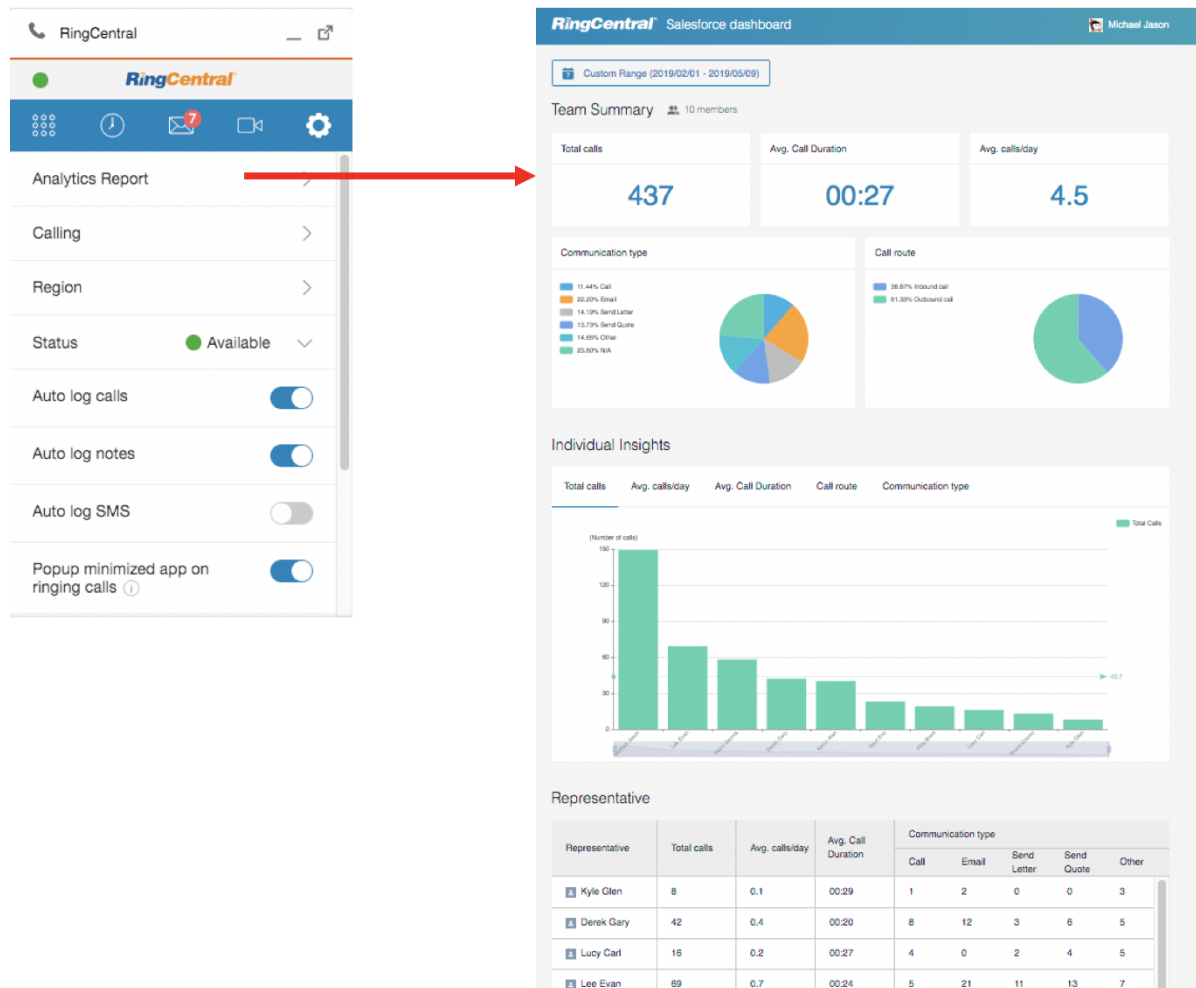
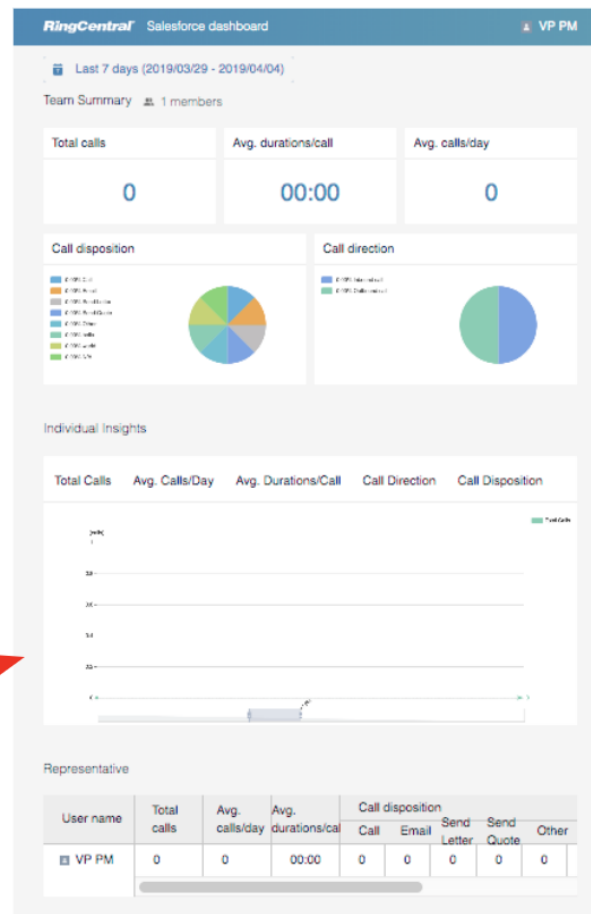
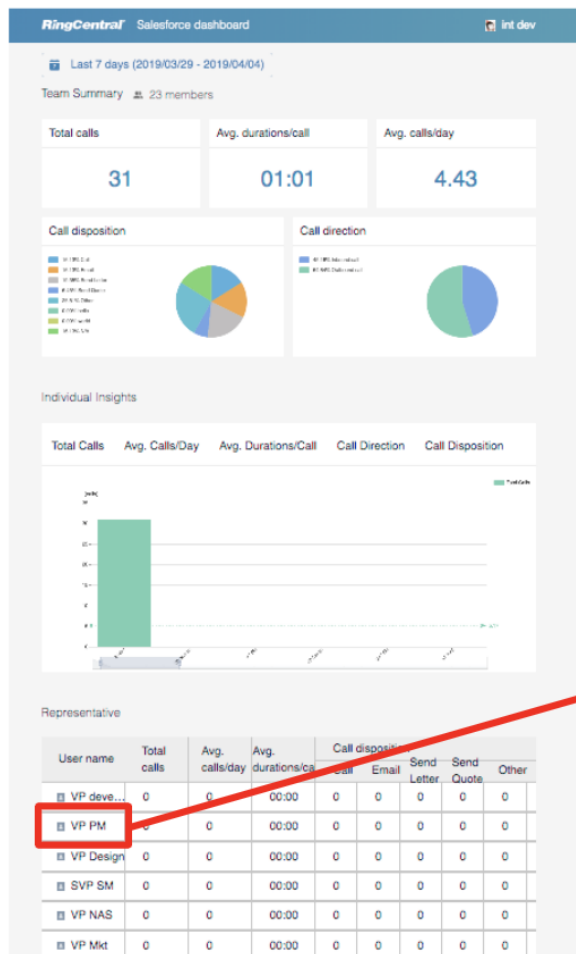


Figure 54

Team view vs. Individual view

You can see all the members under your role based on the Salesforce roles hierarchy. When you click on the name of a sales representative on the table at the bottom of the report, it redirects to an individual page view showing the report for the sales representative selected.

There is no difference between the **Team view** page and the **Individual view** page. Team view, in addition to individual view, will show data for the team members.



Note:

In current version, the call data shows on Analytics Report is limited to call data that has been logged to Salesforce Database. The full coverage call data is on the roadmap and it will be coming soon.

Figure 55

Cloud Phone Reports (beta)

With Cloud Phone Reports, Team Leads and Sales Managers will be able to leverage RingCentral Analytics data such as overall team performance and view it as a native Salesforce report. These reports provide you with the flexibility to edit and customize the report within the Salesforce interface, which the current visualforce based report does not support.

Prerequisite: Users who have Reports/Dashboard features permission would be able to access and edit the reports and also make copies for the future.

Availability: Supported both in Salesforce Classic and Lightning Experience. The Cloud Phone Report will be available from Salesforce Dashboard

Limitations: Compared to the existing Visualforce based RingCentral for Salesforce Analytics Reports, the Cloud Phone Reports has certain limitations and features yet to be supported, such as:

- Average calls details are unavailable
- Access to the report page for a specific user upon clicking on the reps name is unavailable

The screenshot displays the Salesforce Lightning interface. At the top, the navigation bar includes the RingCentral logo, a search bar, and various app tabs like Accounts, App Launcher, Cases, Calendar, Campaigns, Chatter, Contacts, Contracts, Dashboards, Files, Groups, Home, Leads, Reports, and More. The 'Reports' tab is selected, and a dropdown menu is open, showing 'Recent records' with a list of reports. The 'Cloud Phone Report' is highlighted. Below the dropdown, a table lists recent reports with columns for Description, Folder, Created By, Created On, and Subscribed. The table contains five entries, all created by Michael Jason. On the left side, the 'Apps' sidebar is visible, showing a list of apps including High Velocity Sales, Service, RingCentral for Lightning (highlighted with a red '2'), Marketing, Community, Salesforce Chatter, and Content. Below the apps list, there are sections for 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'. The 'Cloud Phone Report' is also visible in the 'Recent records' dropdown menu.

Description	Folder	Created By	Created On	Subscribed
Cloud Phone Report	Cloud Phone Report	Michael Jason	4/15/2020, 11:52 AM	
Cloud Phone Report	Cloud Phone Report	Michael Jason	6/17/2020, 11:18 AM	
Albert Testing	Cloud Phone Report	Michael Jason	1/16/2020, 3:31 PM	
Cloud Phone Report	Cloud Phone Report	Michael Jason	8/27/2018, 9:53 PM	
Albert Testing	Cloud Phone Report	Michael Jason	1/15/2020, 3:05 PM	
Private Reports	Private Reports	Michael Jason	3/22/2019, 9:19 AM	

Figure 56

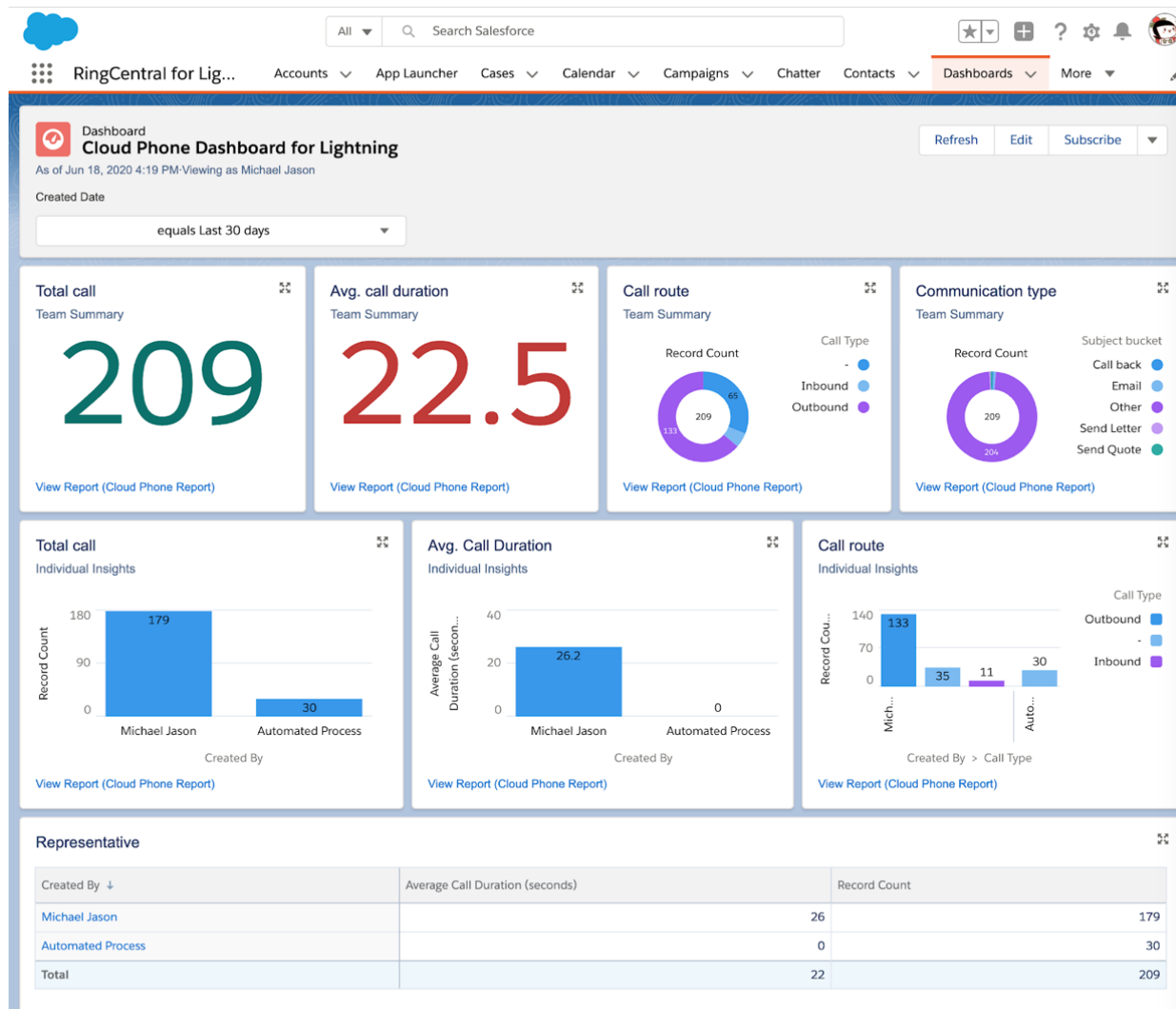


Figure 57

Add RingCentral Call and SMS Options to Salesforce Mobile App

Follow the steps below to add **Call with RingCentral** and **SMS with RingCentral** options to Account/Contact/Lead details tab in the Salesforce Mobile app. As an example, below are the steps to add the options to the Accounts Page Layout.

Create New Actions

Navigate to **App Setup > Customize > Accounts > Buttons, Links, and Actions > New Action**.

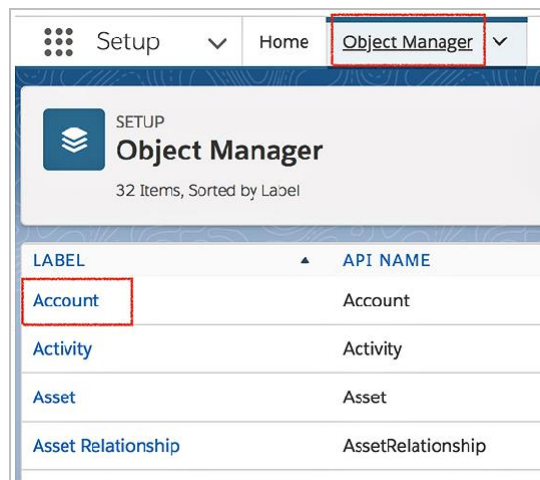


Figure 58

SETUP > OBJECT MANAGER

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Buttons, Links, and Actions

17 Items, Sorted by Label

Q Quick Find

New Action

New Button or Link

LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Accounts Tab	Tab			Standard page	
Add to Call List	CreateCallList			Standard page	
Billing	Billing		Detail Page Link	URL	

Figure 59

Select *Custom Visualforce* as **Action type** and select *Phone Numbers Account [Phone_Numbers_Account]* in the **Visualforce Page** dropdown list, then enter **Call with RingCentral** as **Label**, and click **Save**.

The screenshot shows the 'Enter Action Information' dialog box in Salesforce Lightning. The dialog has a title bar with 'Enter Action Information' and 'Save' and 'Cancel' buttons. The main area contains the following fields:

- Object Name:** Account
- Action Type:** Custom Visualforce
- Visualforce Page:** Phone Numbers Account [rcsf__Phone_Numbers_Account] (This field is highlighted with a red rectangle)
- Height:** 250px
- Standard Label Type:** --None--
- Label:** Call with RingCentral
- Name:** Call_with_RingCentral
- Description:** (Empty text area)
- Icon:** Change Icon

At the bottom of the dialog, there are 'Save' and 'Cancel' buttons.

Figure 60

Repeat the above step and select *Phone Numbers SMS Account [Phone_Numbers_SMS_Account]* in **Visualforce Page** dropdown list, enter **SMS with RingCentral** as **Label**, click **Save**.

Enter Action Information Save Cancel

Object Name Account ⓘ

Action Type Custom Visualforce ▾

Visualforce Page Phone Numbers SMS Account [rcsfl_Phone_Numbers_SMS_Account] ⓘ

Height 250px ⓘ

Standard Label Type --None-- ⓘ

Label SMS with RingCentral

Name SMS_with_RingCentral ⓘ

Description ⓘ

Icon ⚡ [Change Icon](#)

Save Cancel

Figure 61

Add Actions to Salesforce Mobile App.

Navigate to **Setup > Object Manager > Accounts > Page Layouts > Page Layout Assignment**. Select the **Page Layout** you want to change and click **Edit**.

SETUP > OBJECT MANAGER
Account

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Page Layouts
4 Items, Sorted by Page Layout Name

Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Account (Marketing) Layout	srikumar S, 5/14/2018, 5:03 PM	srikumar S, 5/14/2018, 5:03 PM	▼
Account (Sales) Layout	srikumar S, 5/14/2018, 5:03 PM	srikumar S, 5/14/2018, 5:03 PM	▼
Account (Support) Layout	srikumar S, 5/14/2018, 5:03 PM	srikumar S, 5/14/2018, 5:03 PM	▼
Account Layout	srikumar S, 5/14/2018, 5:03 PM	srikumar S, 5/17/2018, 6:26 PM	▼

Edit
Delete

Figure 62

From **Salesforce1 & Lightning Actions** list drag the actions **Call with RingCentral** and **SMS with RingCentral** to the **Salesforce1 and Lightning Experience Actions** section. Click **Save**.

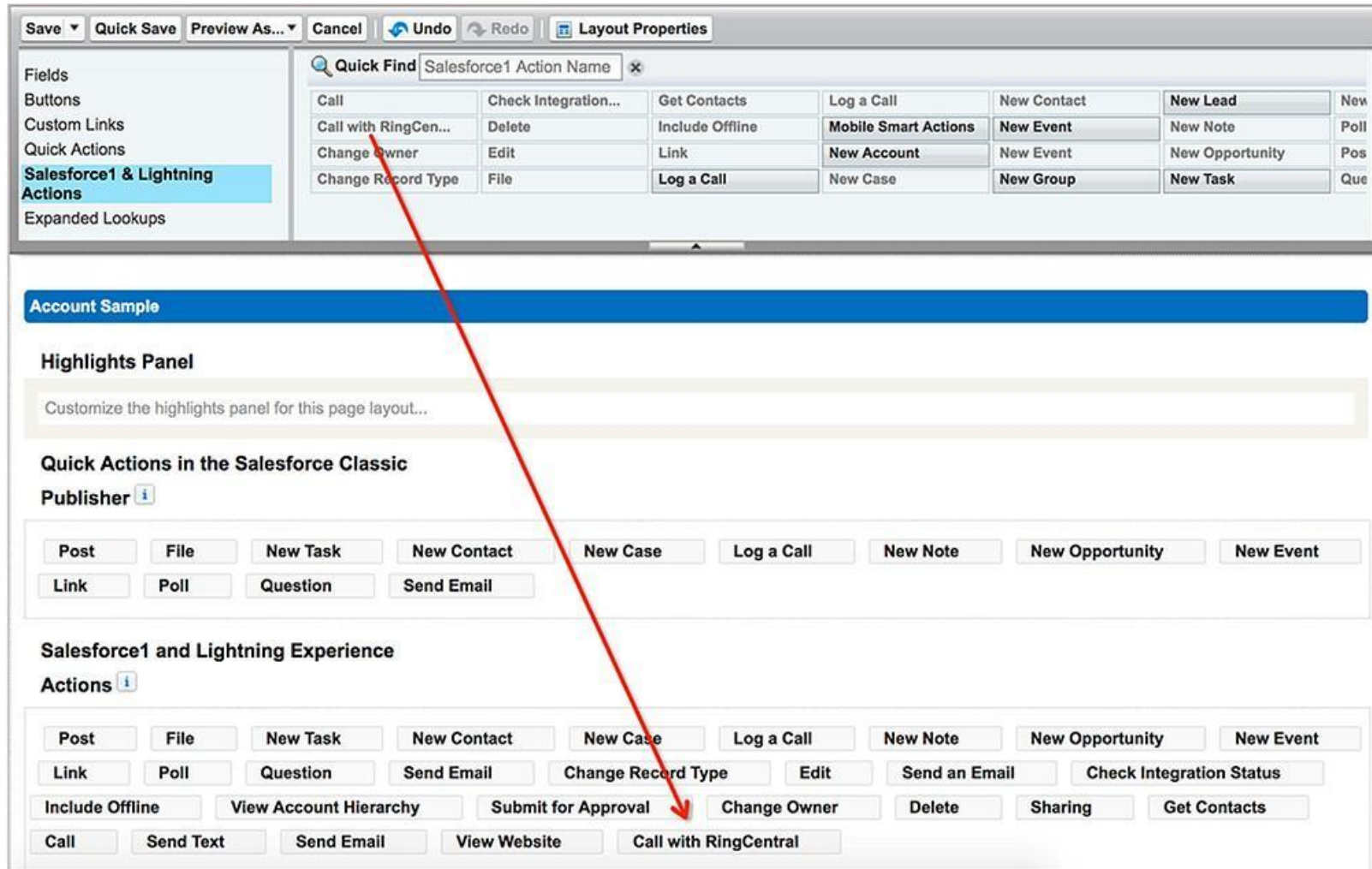


Figure 63

Save

Quick Save

Preview As...

Cancel

Undo

Redo

Layout Properties

Fields

Buttons

Custom Links

Quick Actions

Salesforce1 & Lightning Actions

Expanded Lookups

Quick Find

Salesforce1 Action Name

New Contact	New Lead	New Task	Send an Email	Sharing	View Website
New Event	New Note	Poll	Send Email	SMS with RingCentral	
New Event	New Opportunity	Post	Send Email	Submit for Approval	
New Group	New Task	Question	Send Text	View Account Hier...	

Account Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic

Publisher

Post

File

New Task

New Contact

New Case

Log a Call

New Note

New Opportunity

New Event

Link

Poll

Question

Send Email

Salesforce1 and Lightning Experience

Actions

Post

File

New Task

New Contact

New Case

Log a Call

New Note

New Opportunity

New Event

Link

Poll

Question

Send Email

Change Record Type

Edit

Send an Email

Check Integration Status

Include Offline

View Account Hierarchy

Submit for Approval

Change Owner

Delete

Sharing

Get Contacts

Call

Send Text

Send Email

View Website

Call with RingCentral

SMS with RingCentral

Figure 64

Buttons are added. Navigate to **Salesforce1** and check an account's details. There will be **Call with RingCentral** and **SMS with RingCentral** options.

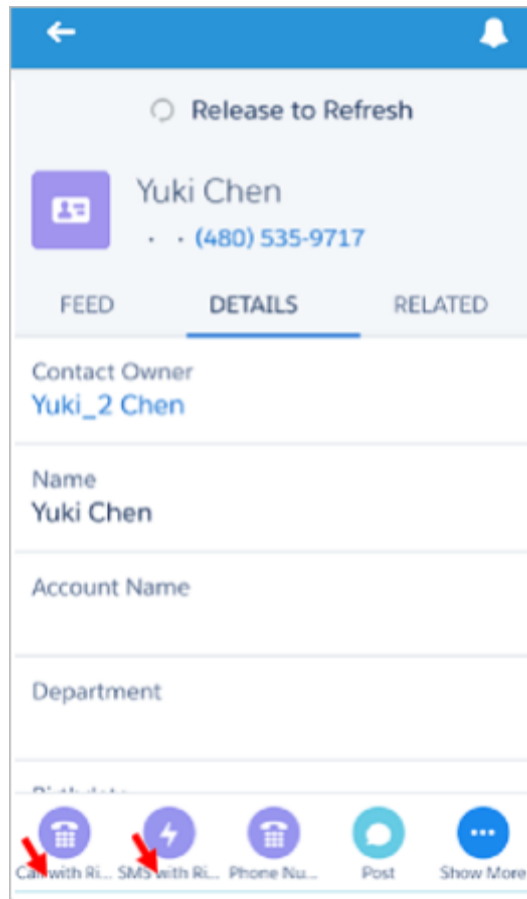


Figure 65

High Velocity Sales (HVS) Settings (beta)

High Velocity Sales is a Salesforce app that targets improving sales processes and efficiency by helping reach out to the best leads, intelligently convert, and create new opportunities in one seamless workspace.

Prerequisite: Please make sure High Velocity Sales app is enabled in your organization's Salesforce account to use these functions.

HVS Settings can be selected from the AdminUI which is the VisualForce page created for administrators to make organization-wide changes to RingCentral for Lightning app settings. The page is: `/apex/rcsfl_adminUI`.

For example, if your Salesforce instance home page is <https://ap2.salesforce.com/home/home.jsp>, your adminUI URL would be https://ap2.salesforce.com/apex/rcsfl_adminUI. After entering the URL, you'll be prompted to **Please click Initialize to go the AdminUI**.

High Velocity Sales (HVS) Settings

☒ Enable HVS Mode (Supported only in Lightning Experience)

Select a custom field for HVS Disposition

HVS Disposition (Default) ▾

☒ Mark HVS Disposition as a required field ⓘ

☐ Redirect incoming calls to Voicemail ⓘ

Modify your HVS Disposition value in the [Object Manager](#) ⓘ

Configure your HVS call result matching in [High Velocity Sales Settings](#)

Save

Figure 66

Enable HVS Mode

Select the checkbox to enable HVS Mode in the RingCentral for Salesforce Lightning widget. Click **Save**. When checked, HVS settings for RingCentral for Salesforce Lightning app will be applied to all users in the organization who are assigned both HVS app and RingCentral for Salesforce Lightning widget.

Once HVS Mode is enabled, additional settings can be configured by the administrator.

Select a custom field for HVS Disposition

To log the call outcome and help move a Sales Cadence forward, RingCentral for Salesforce provides a dropdown field in the call log, called the HVS Disposition. Organizations can choose to log the call outcome using a custom field instead of the HVS Disposition. An example for a custom field could be a Picklist (Plist).

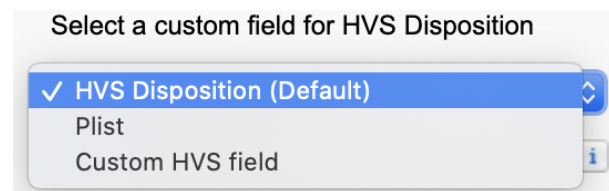


Figure 67

The **Log Customization** section in the **Admin UI** can be used to display selected fields in the call log by moving them from **Available Fields** section to the **Selected Fields** section. For HVS related calls, when, for example, **Plist** is selected as the custom field, it will appear as **HVS Occupied**. All other settings of this field become invalid and this field will show on the top of every call log.

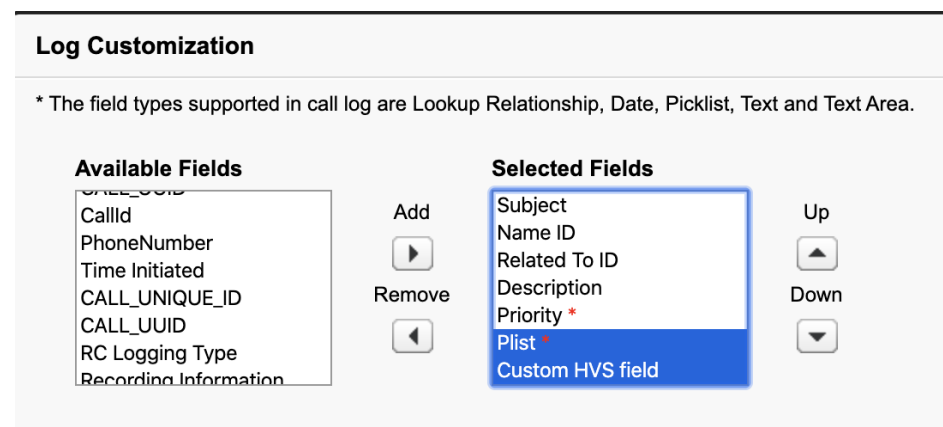


Figure 68

Mark HVS Disposition as a required field

Organizations can choose to make the HVS Disposition a required field where end users have to mandatorily select a value to save the call log and move the Sales Cadence forward.

Recommendation: Keeping this setting checked helps end users such as sales agents log the calls completely without missing any important action associated with their calls and Sales Cadences.

Redirect incoming calls to Voicemail

When checked, any incoming calls coming in during an active HVS call will be directed to Voicemail. However, the RingCentral for Salesforce displays a prompt to take the appropriate action for the call log.

Modify your HVS Disposition value in the Object Manager

The dropdown list of values that can be selected for the HVS Disposition field can be customized through the Object Manager. Click **Object Manager**. A new tab opens to Salesforce Setup page displaying Object Manager settings.

You can find the HVS Disposition field in the Activity or Task Objects in the Object Manager. If present in Activity, click **Activity > Fields & Relationships > HVS Disposition**. If you have selected a custom field to log the HVS call outcome, you will see the custom field under **Fields & Relationships**.

The screenshot shows the Salesforce Object Manager interface for the 'Activity' object. The left sidebar contains a navigation menu with 'Details', 'Fields & Relationships' (highlighted with a red box), 'Buttons and Links', 'Object Limits', 'Search Layouts', and 'Search Layouts for Salesforce Classic'. The main content area is titled 'Fields & Relationships' and shows a list of 44 items, sorted by Field Label. The 'HVS Disposition' field is highlighted with a red box in the list.

Field Label	Field Name	Field Type
DateRequired	DateRequired__c	Date
email	email__c	Email
external_whoid	external_whoid__c	Text(255)
external_whoid	attsfl__external_whoid__c	Text(255)
HVS Disposition	hvs_disposition__c	Picklist
key	key__c	Text(255)

Figure 69

Configure your HVS call result matching in High Velocity Sales Settings

You can configure the call results for Branching and any additional settings by clicking on the **High Velocity Settings**. Next, a new tab opens showing the High Velocity Sales settings page in the Salesforce Setup interface.

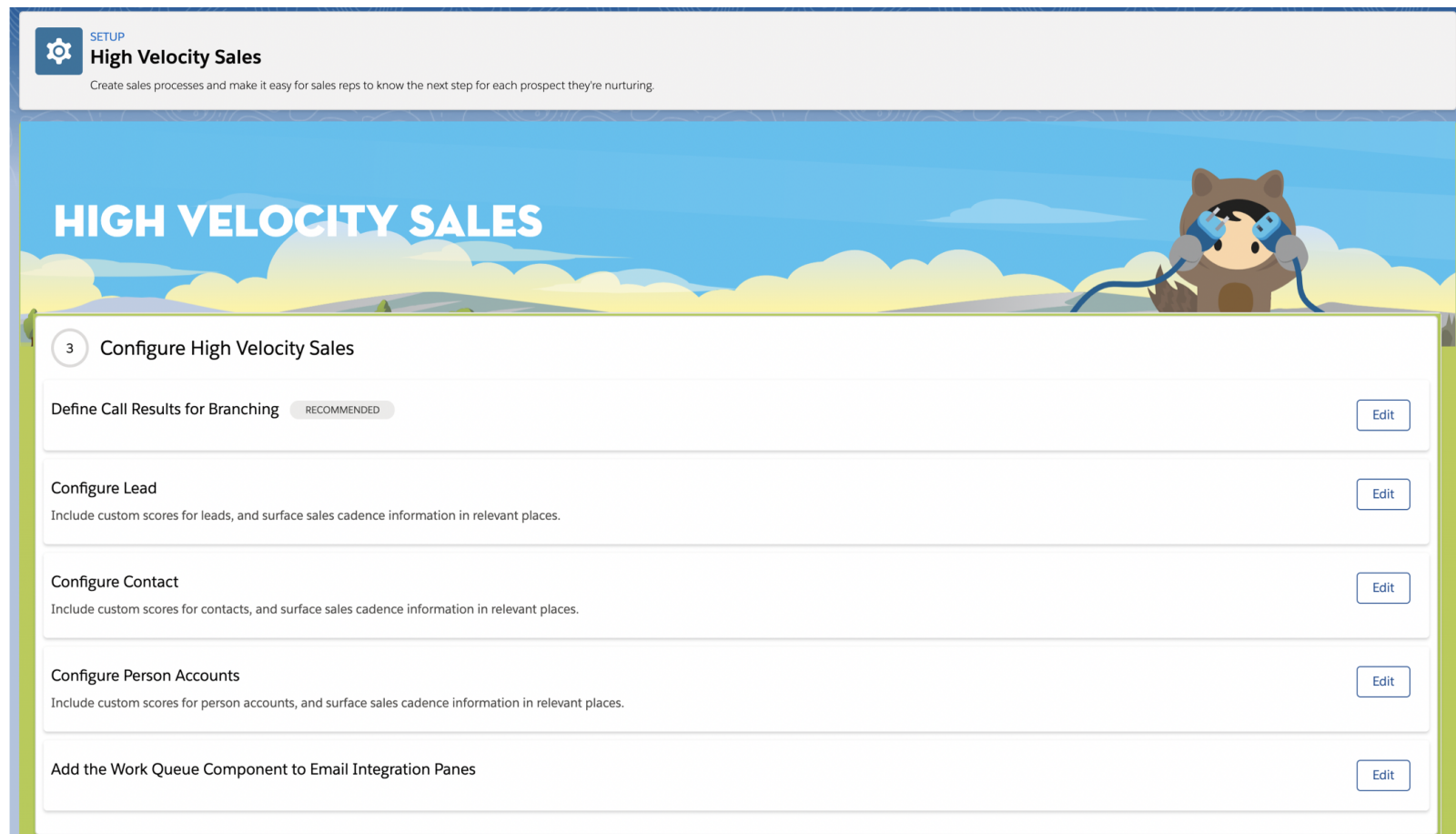


Figure 70

Enabling Do Not Contact

Contact and Lead type objects in Salesforce have a default field **Do Not Call**, available in the Contact or Lead layout, which is used by admins as a flag to remind the end user to not contact this record.

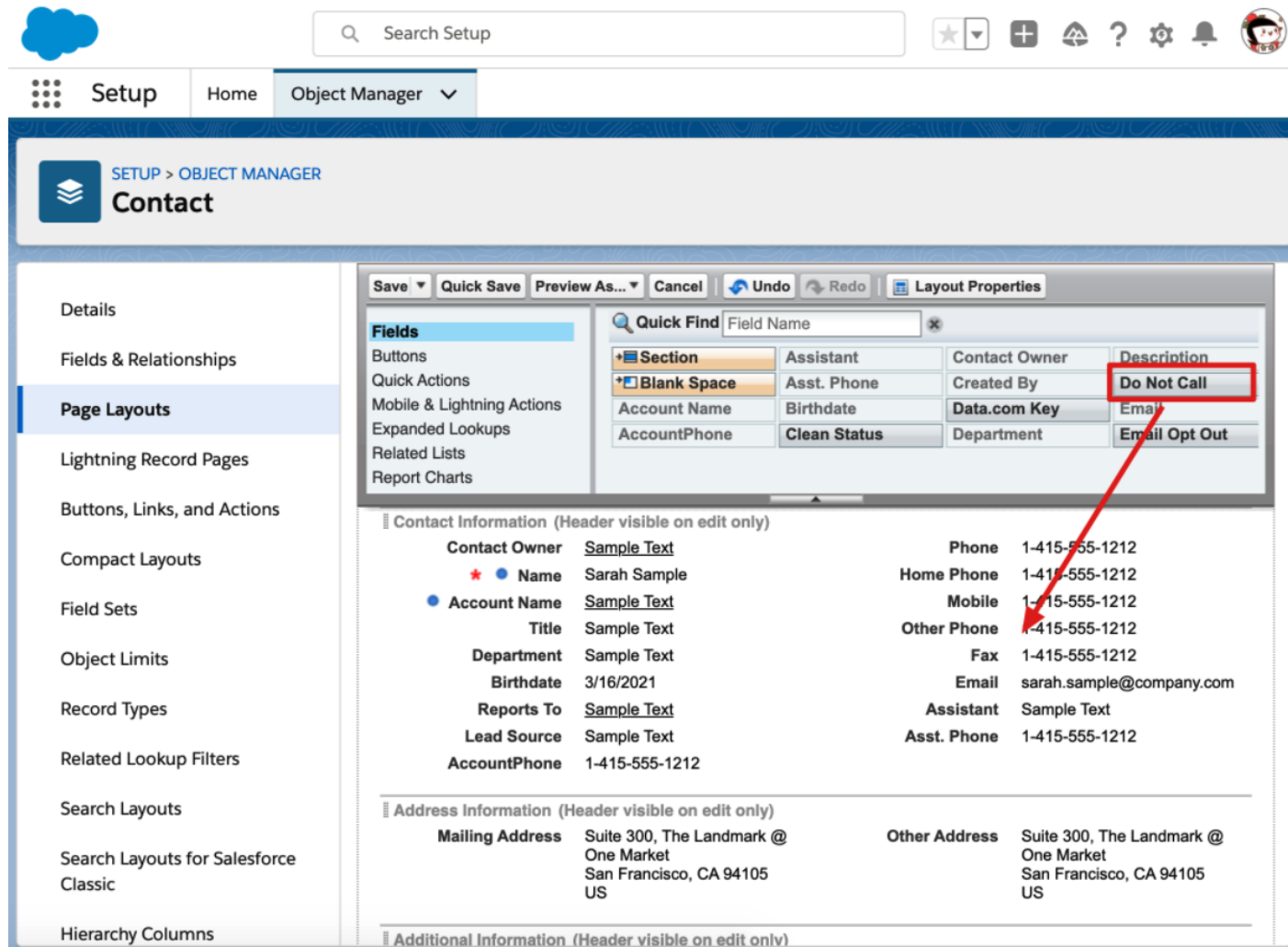
RingCentral for Salesforce Integration can be enabled to honor the Do Not Call (DNC) flag set within Leads and Contacts in Salesforce.

If a Lead or a Contact is flagged with the DNC field, then the Salesforce admins can enable the RingCentral for Salesforce to restrict the end users in the organization from calling or sending text messages to those leads or contacts.

Here are the details of the DNC capability in RingCentral for Salesforce.

Steps

1. Upgrade the RingCentral for Salesforce to latest version (v6.11.0 or later).
2. Make sure the DNC field is available to be set in the Salesforce Org. This can be done by enabling the DNC field in the page layout in Contact and Leads.



The screenshot displays the Salesforce Admin UI for RingCentral for Salesforce Lightning. The top navigation bar includes the RingCentral logo, a search bar, and various utility icons. The left sidebar shows the 'Setup' menu with options like 'Home', 'Object Manager', 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'Search Layouts for Salesforce Classic', and 'Hierarchy Columns'. The main content area is titled 'SETUP > OBJECT MANAGER Contact'. It features a 'Fields' section with a 'Quick Find' bar and a table of fields. The 'Do Not Call' checkbox is highlighted with a red box. A red arrow points from this checkbox to the 'Do Not Call' checkbox in the 'Contact Information' section, which is also unchecked.

Field Name	Field Type	Field Label	Field Description
Section	Text	Section	
Blank Space	Text	Blank Space	
Account Name	Text	Account Name	
AccountPhone	Text	AccountPhone	
Assistant	Text	Assistant	
Asst. Phone	Text	Asst. Phone	
Birthdate	Text	Birthdate	
Clean Status	Text	Clean Status	
Contact Owner	Text	Contact Owner	
Created By	Text	Created By	
Data.com Key	Text	Data.com Key	
Department	Text	Department	
Email	Text	Email	
Email Opt Out	Text	Email Opt Out	

Contact Information (Header visible on edit only)

Contact Owner	Sample Text	Phone	1-415-555-1212
Name	Sarah Sample	Home Phone	1-415-555-1212
Account Name	Sample Text	Mobile	1-415-555-1212
Title	Sample Text	Other Phone	1-415-555-1212
Department	Sample Text	Fax	1-415-555-1212
Birthdate	3/16/2021	Email	sarah.sample@company.com
Reports To	Sample Text	Assistant	Sample Text
Lead Source	Sample Text	Asst. Phone	1-415-555-1212
AccountPhone	1-415-555-1212		

Address Information (Header visible on edit only)

Mailing Address	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US	Other Address	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US
-----------------	--	---------------	--

Additional Information (Header visible on edit only)

- Open the Admin UI for RingCentral for Salesforce. There shall be a Do Not Call (DNC) Settings session. This feature is turned OFF by default.

Do Not Call (DNC) settings

Turning On the DNC settings below will fully or partially restrict the users to call or message the records flagged with DNC within Salesforce.

☐ Turn On DNC settings while calling or messaging

Call settings

- ☐ Restrict calls for DNC records [i](#)
- ☒ Override and call DNC records [i](#)

SMS settings

- ☐ Restrict SMS for DNC records [i](#)
- ☒ Override and SMS DNC records [i](#)

Save

- To turn ON the feature, check **Turn On DNC settings while calling or messaging**, then select the Call and SMS Settings.

Do Not Call (DNC) settings

Turning On the DNC settings below will fully or partially restrict the users to call or message the records flagged with DNC within Salesforce.

☒ Turn On DNC settings while calling or messaging

Call settings

- ☒ Restrict calls for DNC records [i](#)
- ☐ Override and call DNC records [i](#)

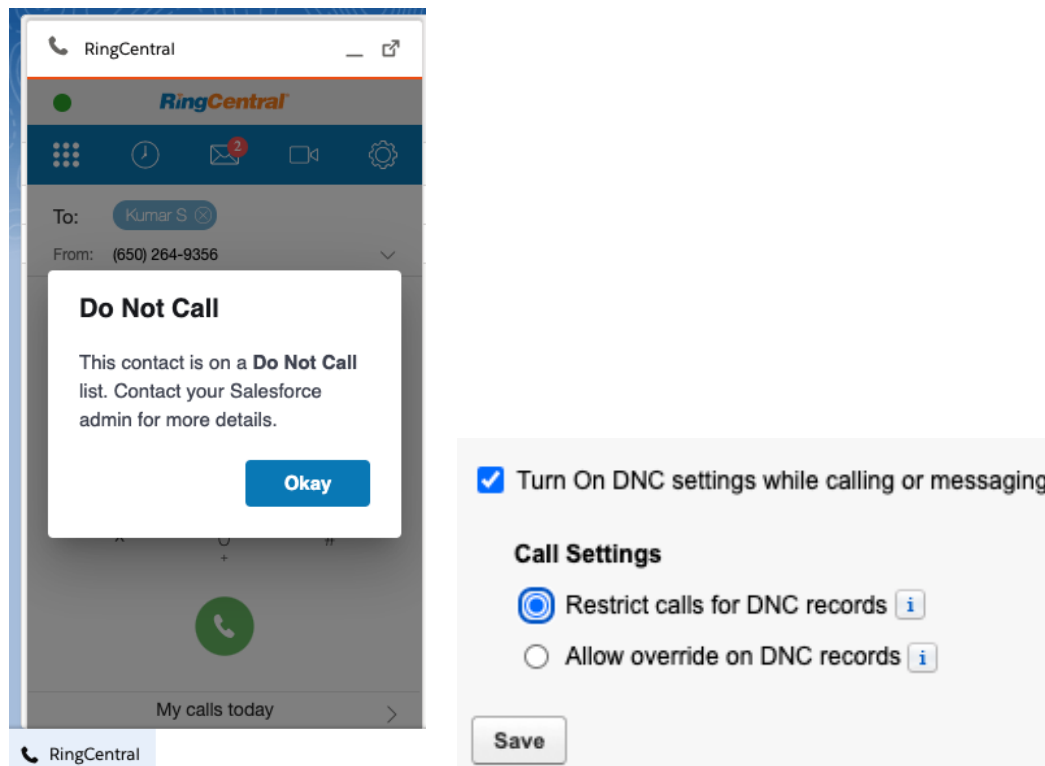
SMS settings

- ☒ Restrict SMS for DNC records [i](#)
- ☐ Override and SMS DNC records [i](#)

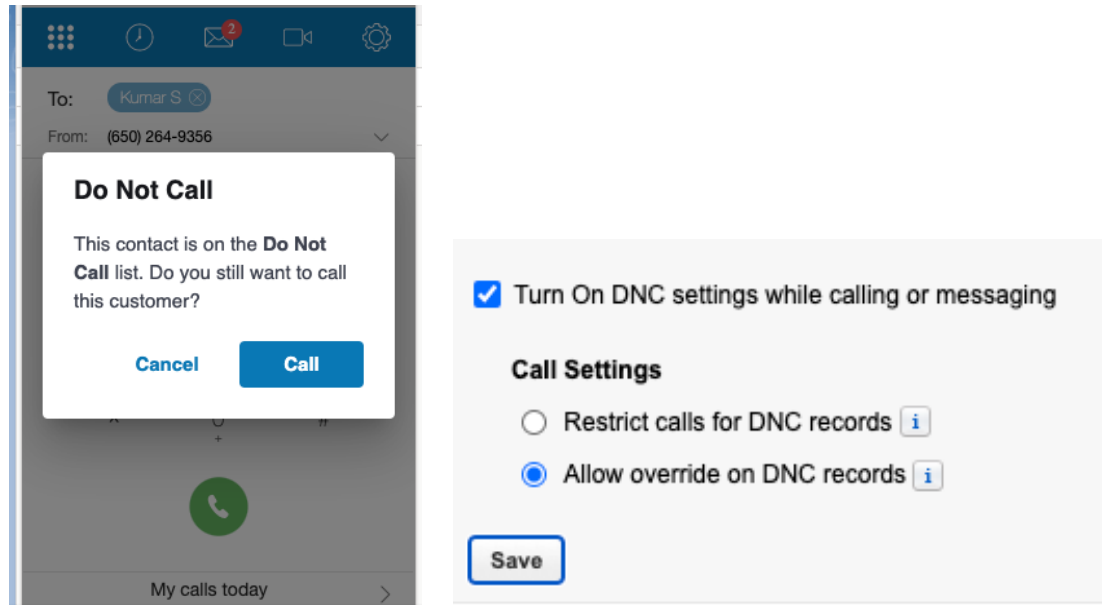
Save

5. The DNC call settings

- a. **Restrict calls for DNC records:** In this mode, end users will not be able to make calls to DNC records with RingCentral for Salesforce. A notification will pop up when the end user initiates a call stating they cannot place the call as the record is on DNC.

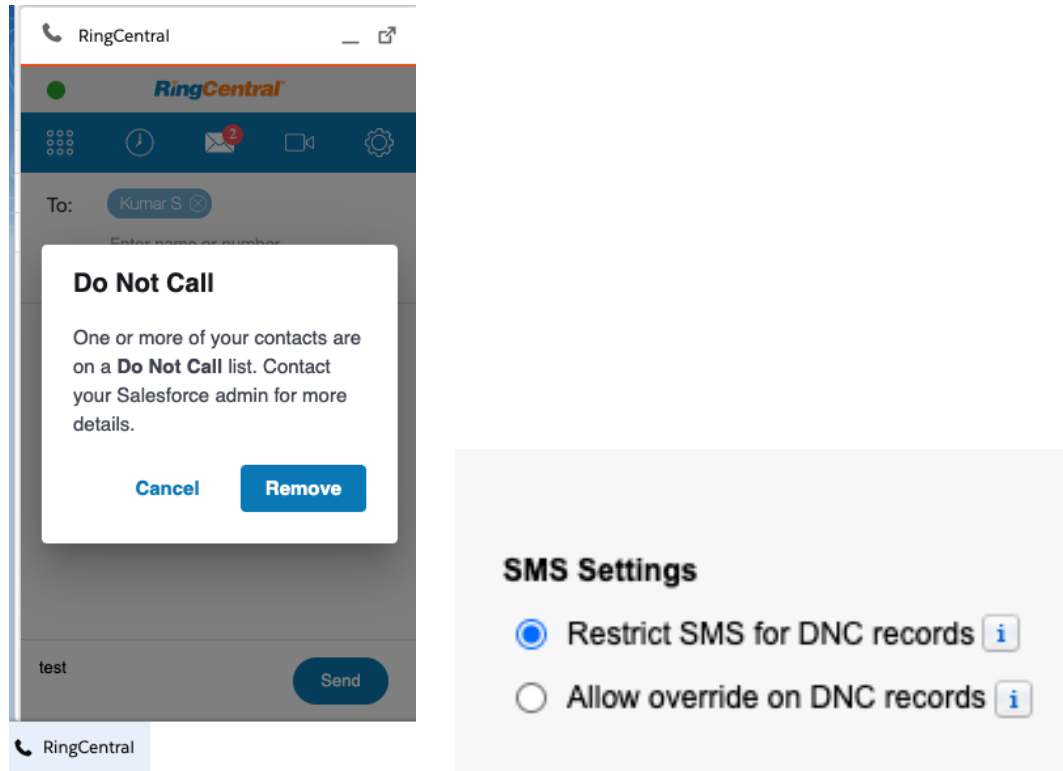


- b. **Override and call DNC records:** In this mode, when the end user tries to make calls to DNC records with RingCentral for Salesforce, they will be notified that this is a DNC record, but will still be given the capability to override and make calls.

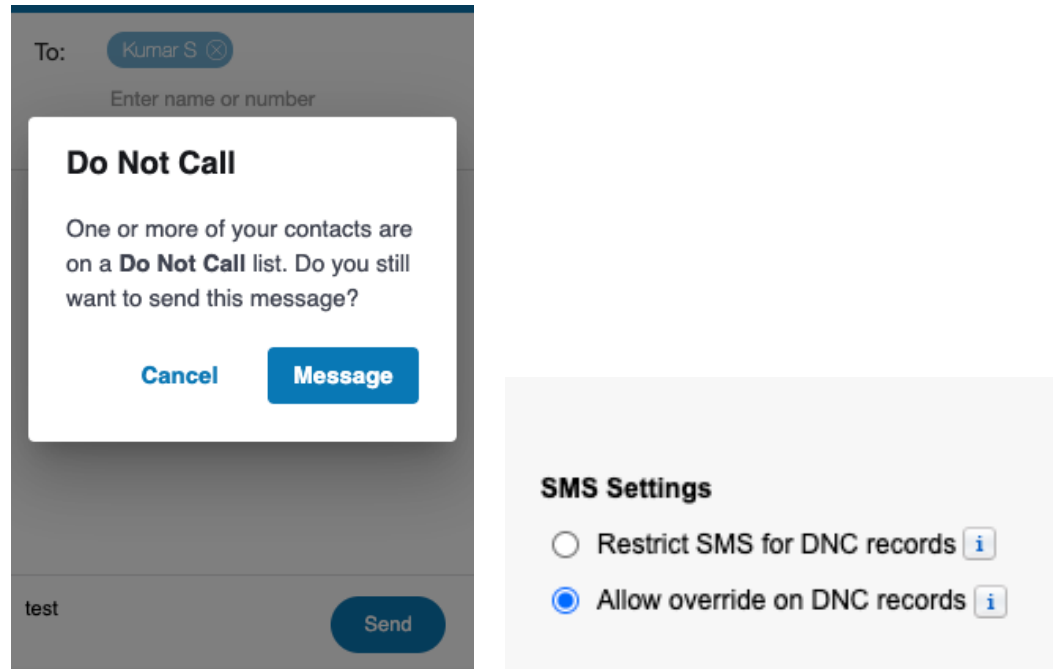


6. The DNC SMS settings

- a. **Restrict SMS for DNC records:** In this mode, end users will not be able to SMS DNC records with RingCentral for Salesforce. A notification will pop up and alert the user.



- b. **Override and SMS DNC records:** In this mode, when end users attempt to SMS DNC records with RingCentral for Salesforce, they will be notified that this is a DNC record. But the end user will still be able to override and SMS the DNC records.



7. Click the **Save** button to make the setting available for the organization. The end user will need a reload (refresh or next login) to inherit the setting.

Note:

1. DNC calling might introduce impact to performance.
 1. When the end user tries to make a call with a phone number, CTI will firstly send the phone number to Salesforce to see if it matches any DNC records. The time it takes for this process is depending on network condition, Salesforce server performance, and sometimes the local browser performance.

Troubleshooting

Q: RingCentral for Salesforce is not visible for some profiles. What is the problem?

Does RingCentral for Salesforce require any special permission?

A: RingCentral for Salesforce does not require any special permissions and it should work for all out-of-the-box profiles. First, ensure that the relevant users have been added to the Call Center as given here in Step 2 of the Call Center setup above.

It is also possible that there is a custom component in the sidebar layout and the JavaScript in those components is interfering with RingCentral for Salesforce.

To resolve this issue, temporarily remove all customizations that have been applied to the sidebar component. Once you see RingCentral for Salesforce rendered properly, add your custom components back one by one so you can pinpoint which bit is creating the issue.

Once you find the component causing the problem, contact the developer of that component to fix the issue.

Q: Users don't see a new tab or window opening on incoming calls. What's wrong?

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

A: You can do this by removing the users from RingCentral for Salesforce Call Center profile.

Q: What browsers does the app support?

A: The following browsers are supported by the app:

- Internet Explorer 11 + (Windows 7, 8, 10 or higher)
- IE Edge 38+ (Windows 7, 8, 10 or higher)
- Firefox 52+ (Windows, Mac)
- Chrome 56+ (Windows, Mac)
- Safari 11+ (Mac)

Q: On logging into RingCentral for Salesforce, users are getting this error message: "Your RingCentral edition does not support Salesforce 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 this feature of Salesforce integration.

You may have to upgrade your account to be able to use this feature. Please contact your RingCentral representative to get more information.

Q: Some of my users are getting a message saying "Insufficient Privileges" where the RingCentral integration should be.

A: These users require access to the RingCentral

Visualforce page in their profile. To enable this access, go to the user's profile. You'll find a section called Visualforce Page Access. Ensure that the page **OpenCTIIndex** is included for this profile.

Q: Click To Dial is not working for some or all of my users. How do I fix it?

A: First, navigate to **App Setup > Call Center > Customize Call Centers** and verify that the **CTI Adapter URL** is pointing at:

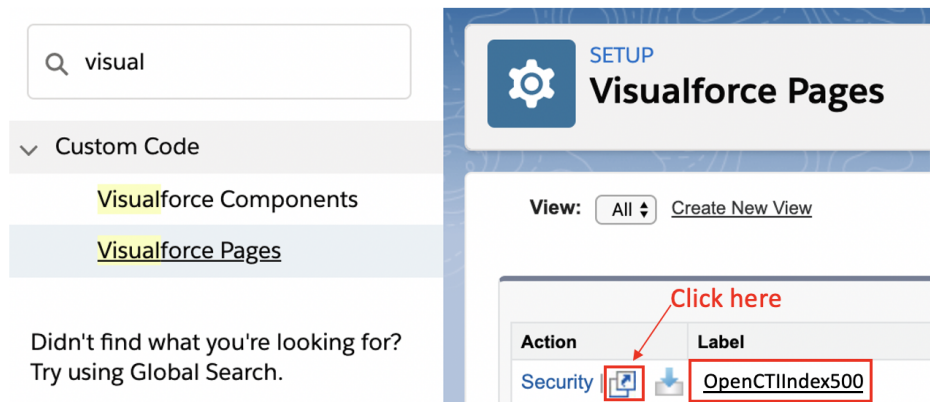
/apex/OpenCTIIndex

If it is not pointing at the URL above, then change it to that URL and see if that fixes the issue.

Q: I am facing major issues after upgrading my RingCentral for Salesforce to the latest version.

A: You can roll back to the previous 5.x version by following the steps below:

1. Navigate to **Setup > Visualforce Pages**, then click the preview icon next to the **OpenCTIIndex500**.



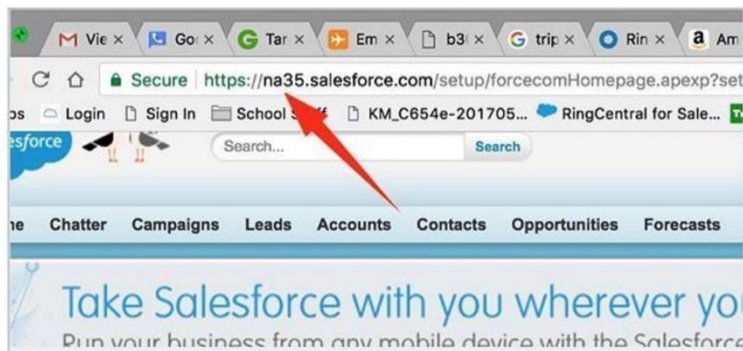
2. After the page opens in a new tab or window, copy its URL.

For example, the full URL is: <https://c.na78.visual.force.com/apex/OpenCTIIndex500#/login>
copy the following part of the URL: <https://c.na78.visual.force.com/apex/OpenCTIIndex500>

3. Close the tab and return to **Setup Home > Call Centers** and click **Continue**.
4. Next, paste the URL from the **OpenCTIIndex** page to CTI Adapter URL, then click **Save**.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Call Centers' is selected under 'Service'. The main content area is titled 'Call Center Edit' and 'Cloud Phone App v2'. Below this, the 'General Information' section contains several fields: 'InternalName' (LightningCallCenterExp), 'Display Name' (Cloud Phone App v2), 'CTI Adapter URL' (https://rcsf1.na35.visual), 'Use CTI API' (true), 'Softphone Height' (450), and 'Softphone Width' (300). A red box highlights the 'CTI Adapter URL' field, and a red arrow points to it from the text 'Paste the CTI Adapter URL here'.

Note: In case you are not using a custom URL, follow the same steps and make sure the Salesforce POD# in Call Center URL (na35 in this example) matches with Call Center where Salesforce Org resides. Your Salesforce POD# is specified in the browser address bar after you log in to Salesforce.



Now you are all set with the rollback.

Q: How do my organization get the ability to Schedule or Start an Instant RingCentral Video Meetings from SF Global Actions?

A: The feature to schedule or start instant RingCentral video meetings is available when you install the version 6.9.0 of the integration from AppExchange. The installation of 6.9.0 will enable buttons in Salesforce Global Actions to schedule and start instant RingCentral Video for all users independent of them having access to the CTI.

Q. After installation I cannot create the call center from the RingCentral Admin app.

A: If the RingCentral for Salesforce App is installed for the first time, then the RingCentral Admin App also known as the install wizard should provide the option to create the Call Center. If this button to create the call center is disabled or you cannot create see the call center after an upgrade here is a workaround to manually create the call center.

1. Copy the content below into a file and save it as RCCallCenter.xml

<callCenter>

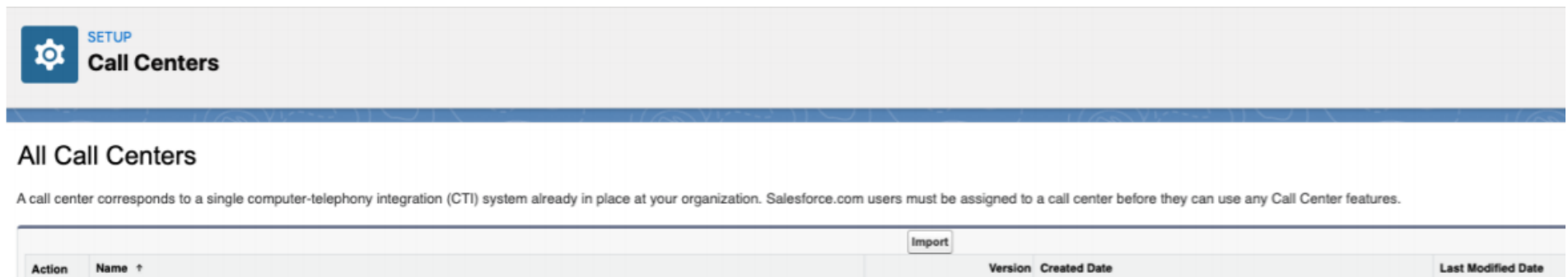
```
<section sortOrder="0" name="reqGeneralInfo" label="General Info">
  <item sortOrder="0" name="reqInternalName"
    label="Internal Name">cloudphoneappbyfile</item>
  <item sortOrder="1" name="reqDisplayName"
    label="Display Name">Cloud Phone App Create By File Import</item>
  <item sortOrder="2" name="reqUseApi"
    label="Use CTI API">true</item>
  <item sortOrder="3" name="reqSalesforceCompatibilityMode"
    label="Salesforce Compatibility Mode">Classic_and_Lightning</item>
  <item sortOrder="4" name="reqAdapterUrl"
    label="CTI Adapter URL">https://rcsfl.na75.visual.force.com/apex/OpenCTIIndex
</item>
  <item sortOrder="5" name="reqSoftphoneHeight"
    label="Softphone Height">546</item>
  <item sortOrder="6" name="reqSoftphoneWidth"
    label="Softphone Width">306</item>
</section>

<section sortOrder="1" name="DialingOptions" label="Dialing Options">
  <item sortOrder="0" name="OutsidePrefix">
```

```
    label="Outside Prefix">1</item>
<item sortOrder="1" name="LongDistPrefix"
    label="Long Distance Prefix">9</item>
<item sortOrder="2" name="InternationalPrefix"
    label="International Prefix">01</item>
</section>

</callCenter>
```

2. Now go to the call center section in the Salesforce admin and click on import.



3. Select the RCCallCenter.xml file
4. Now the call center will be created.

Now go back to the setup section in the guide and continue to add users by clicking on **Manage Call Center Users** and also ensuring that you copy-paste the valid OpenCTI URL in the call center.