RingCentral for Salesforce Lightning

Admin Guide

For v6.12.0 and Later

CONTENTS

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.

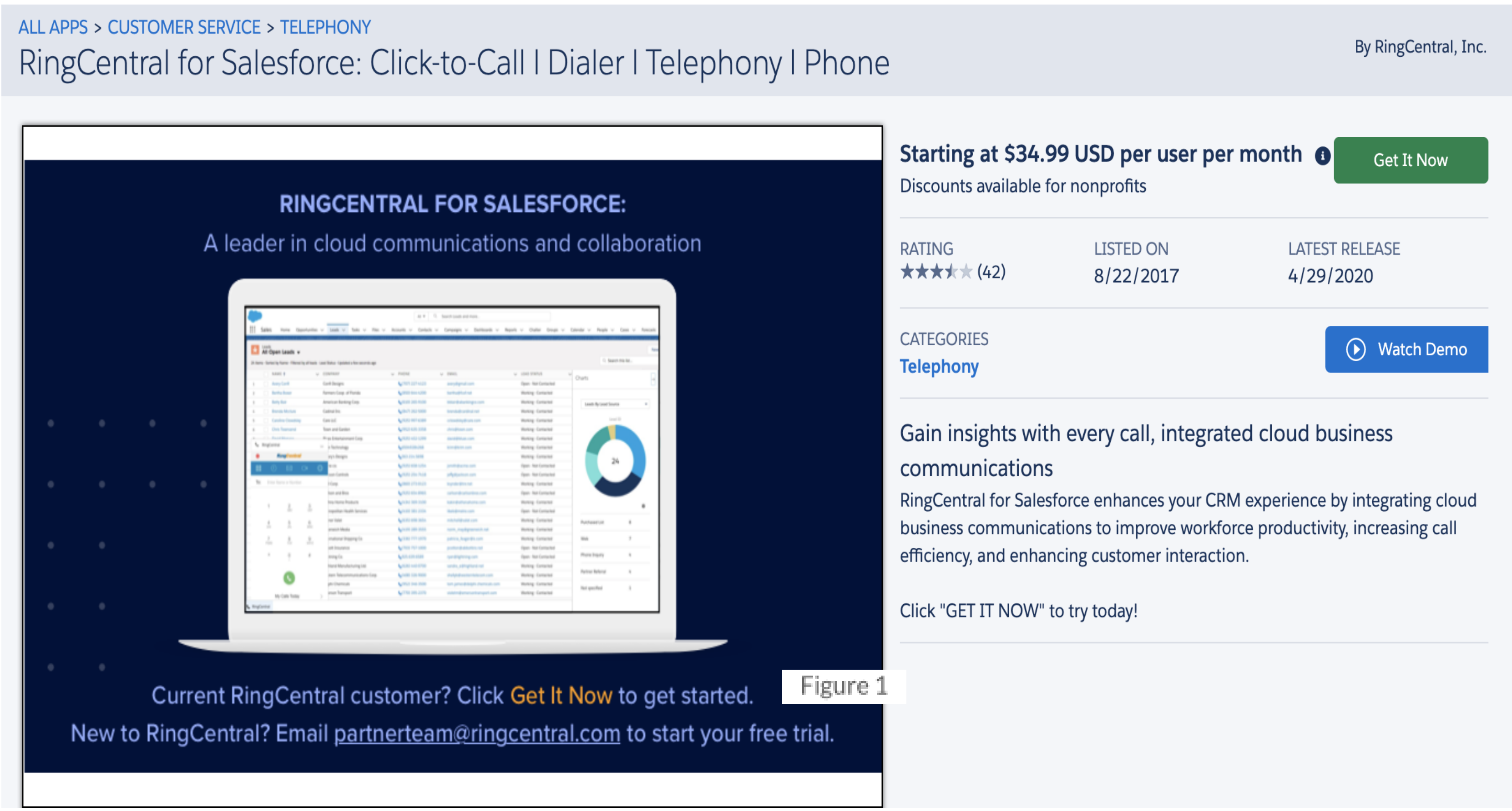


Figure 1

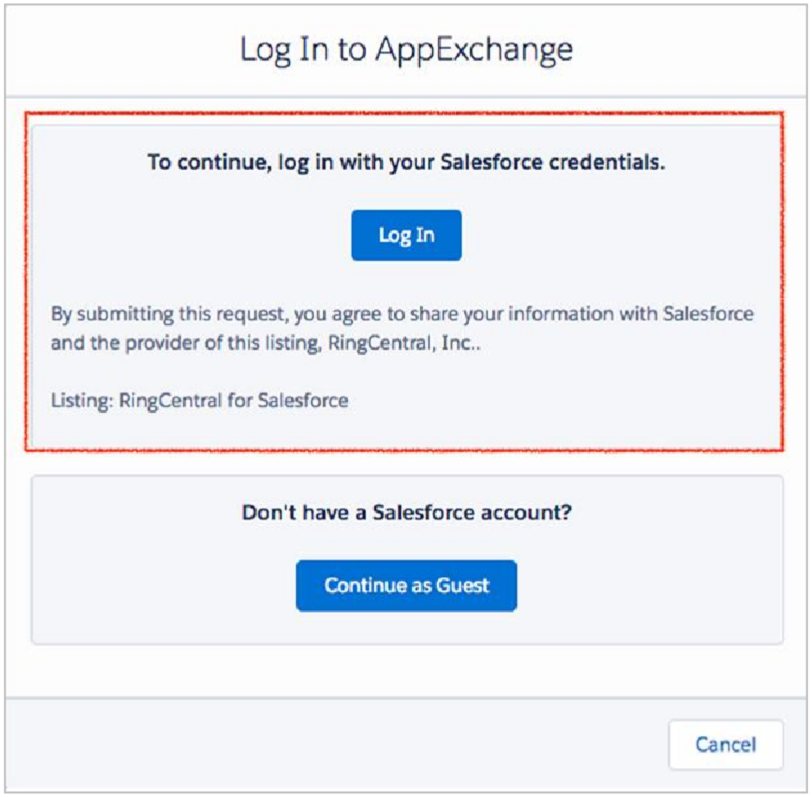


Figure 2

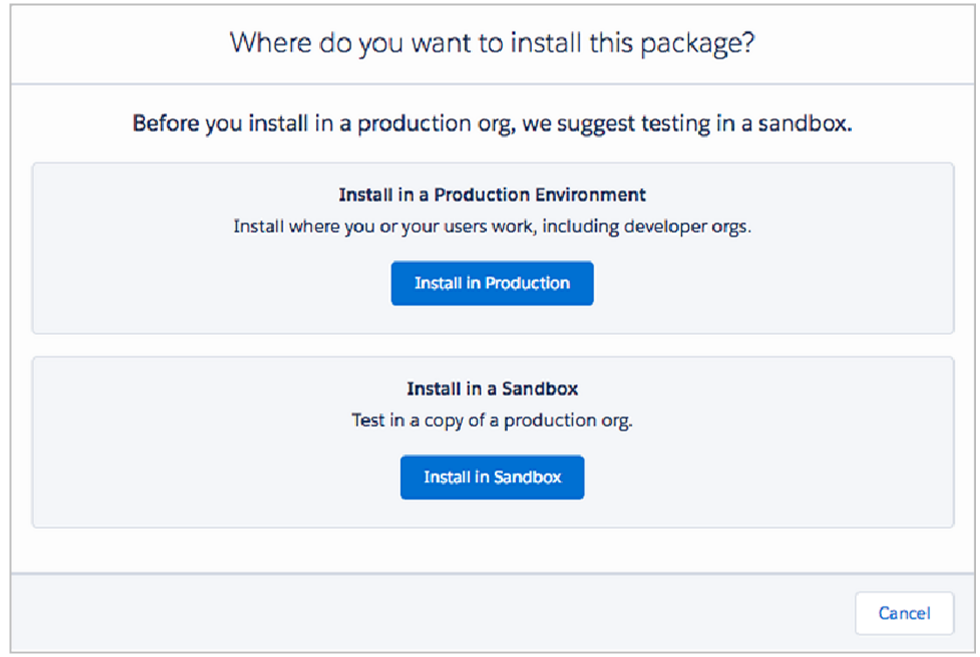


Figure 3

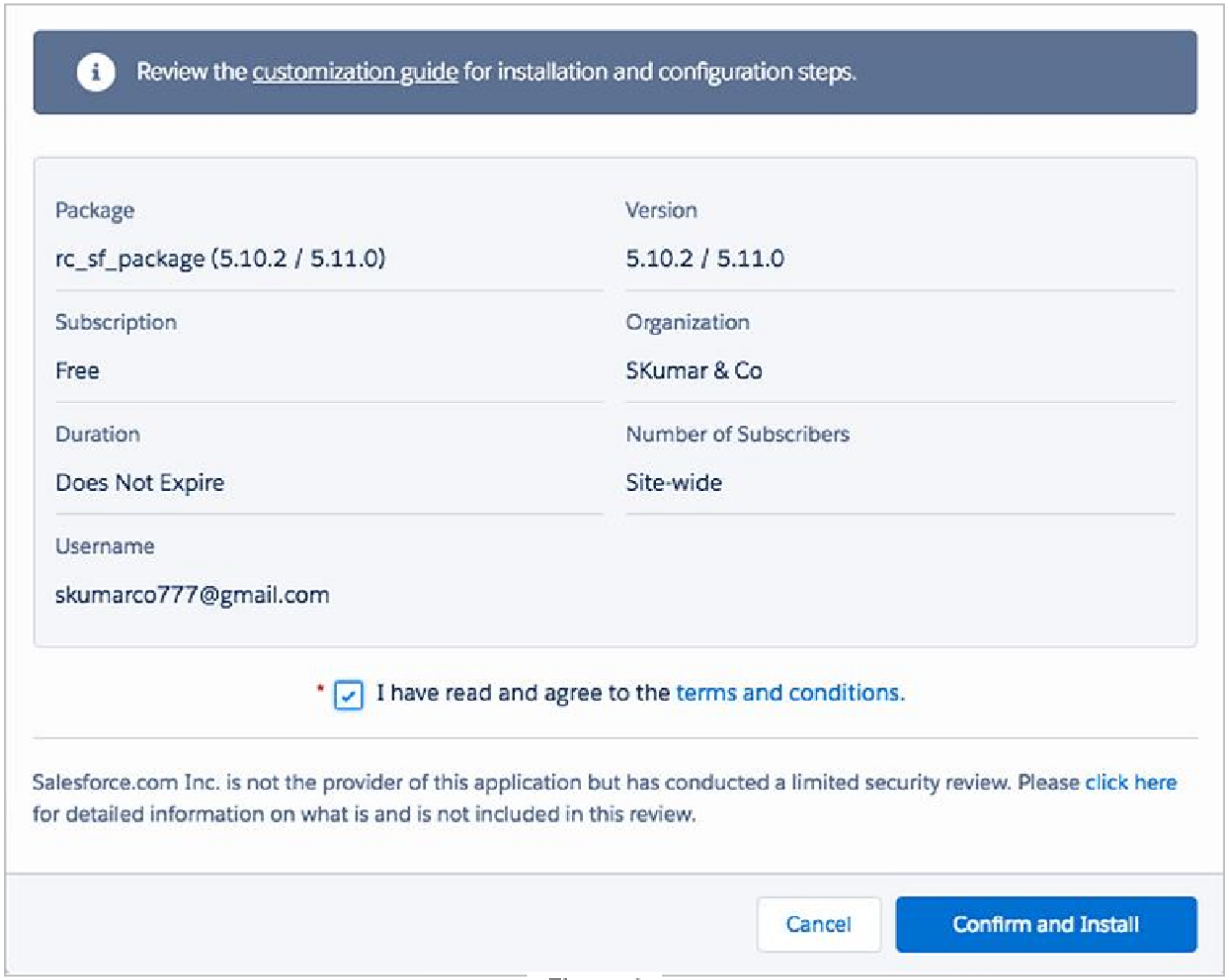

Review the customization guide for installation and configuration steps.
Package
rc_sf_package (5.10.2 / 5.11.0)
Version
5.10.2 / 5.11.0
Subscription
Free
Organization
SKumar & Co
Duration
Does Not Expire
Number of Subscribers
Site-wide
Username
skumarco777@gmail.com
* I have read and agree to the terms 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.

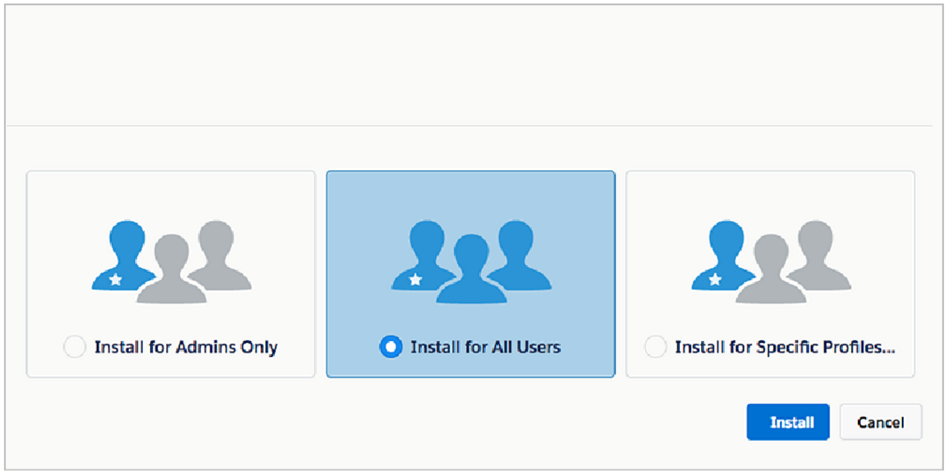


Figure 5

Wait for the installation to complete.

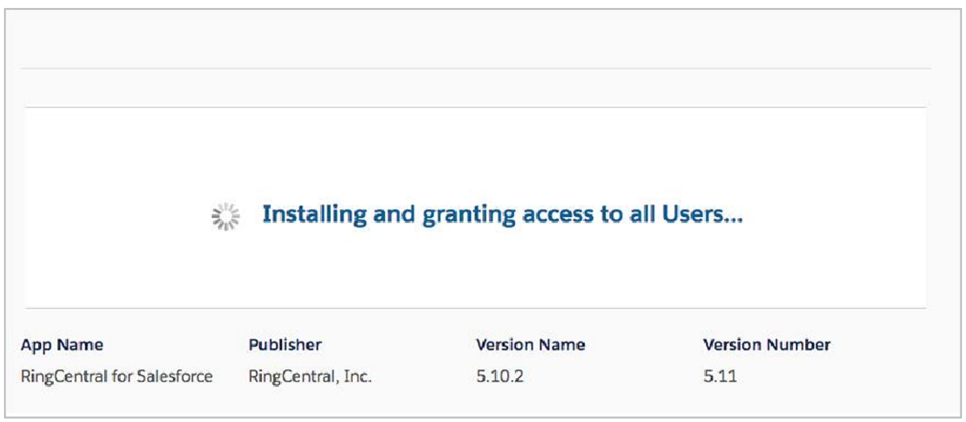


Figure 6

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

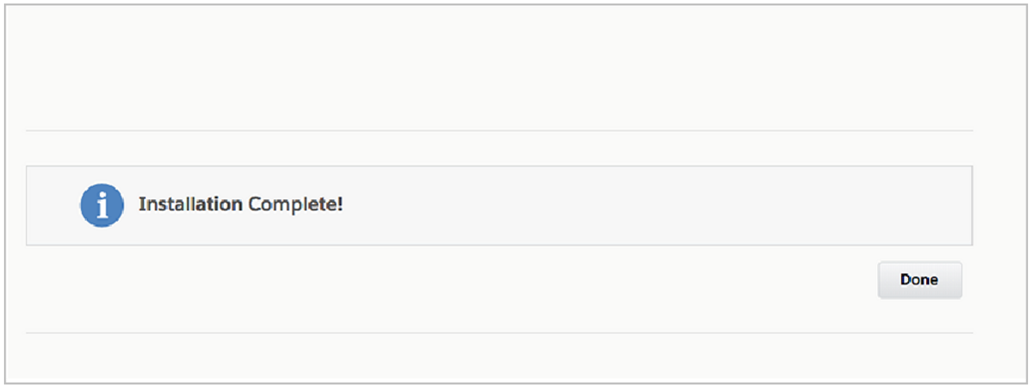


Figure 7

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

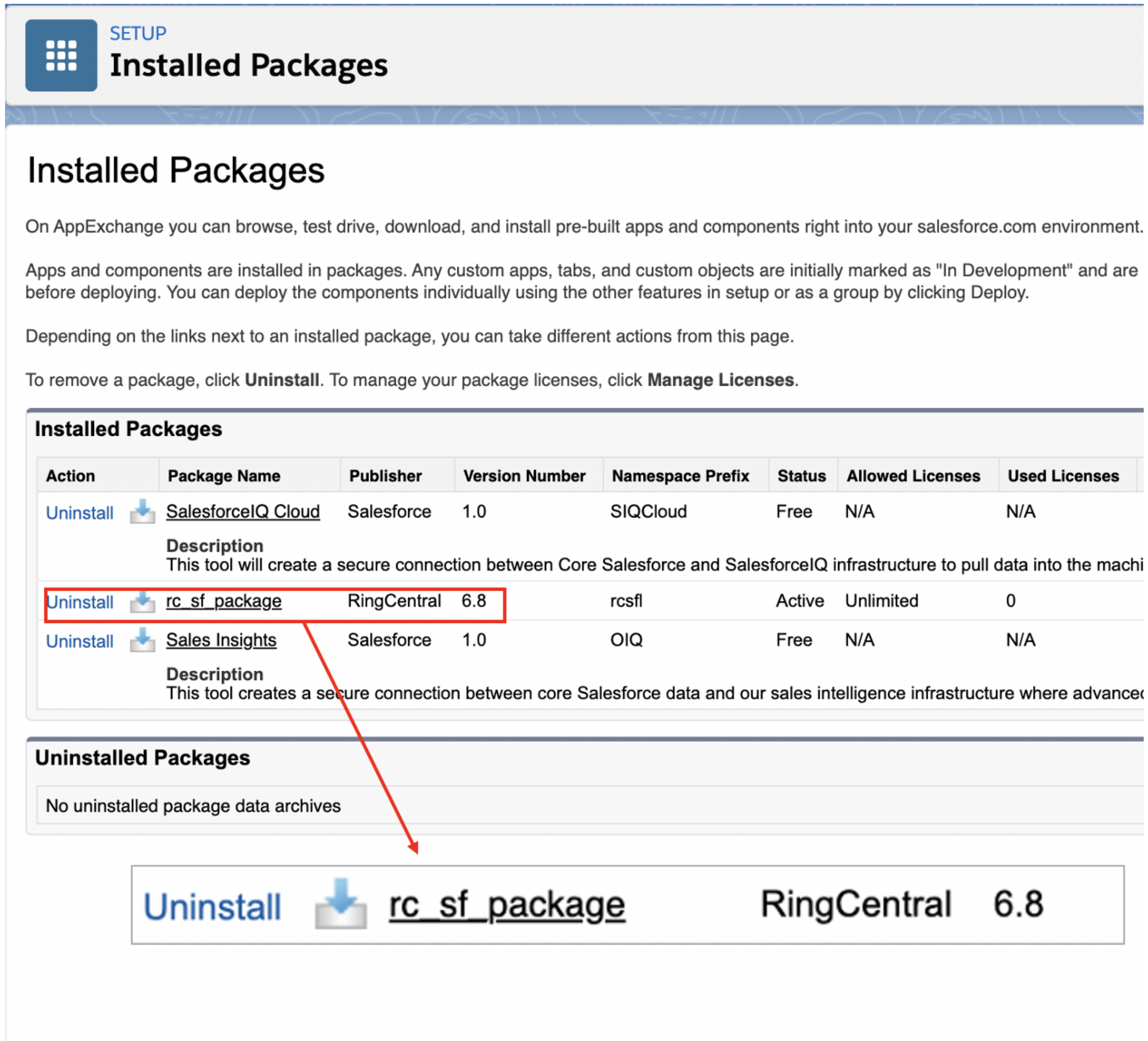


Figure 8

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**.

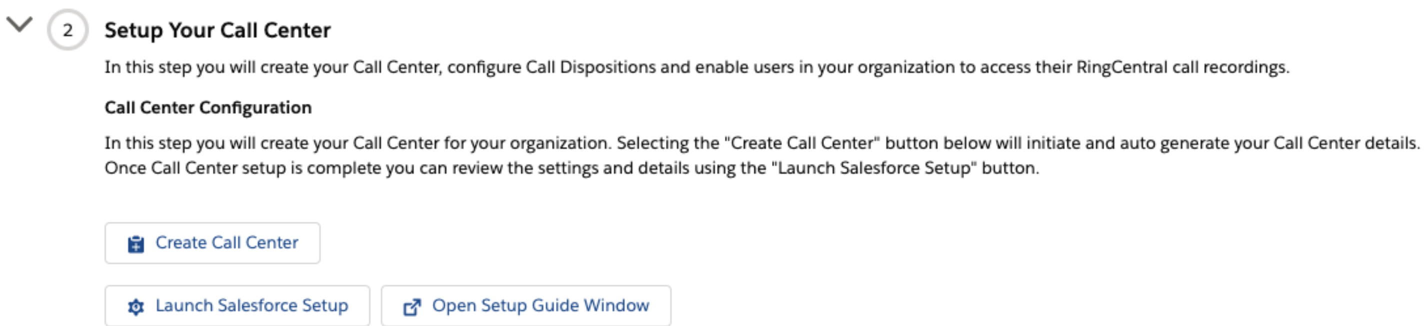
The Install wizard will guide you through all the required steps for configuring the RingCentral for Salesforce application. The install wizard is divided into seven steps for configuring various settings.

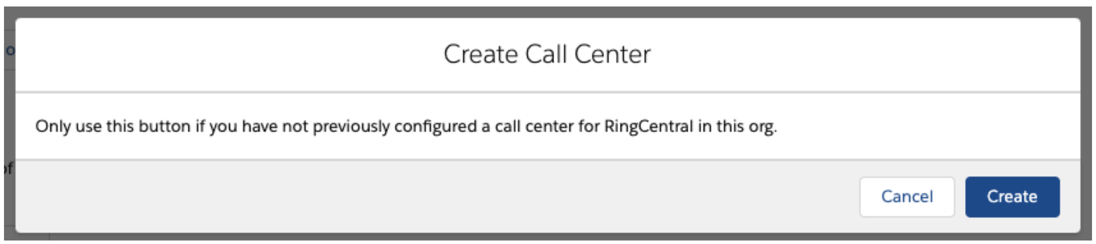
1. **Welcome**

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

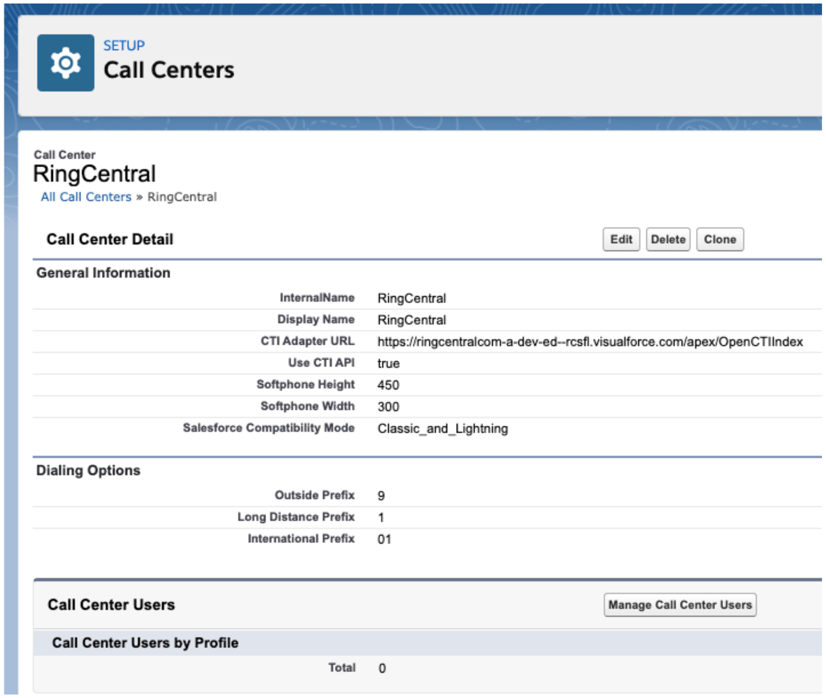
2. **Setup Your Call Center**

   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.





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



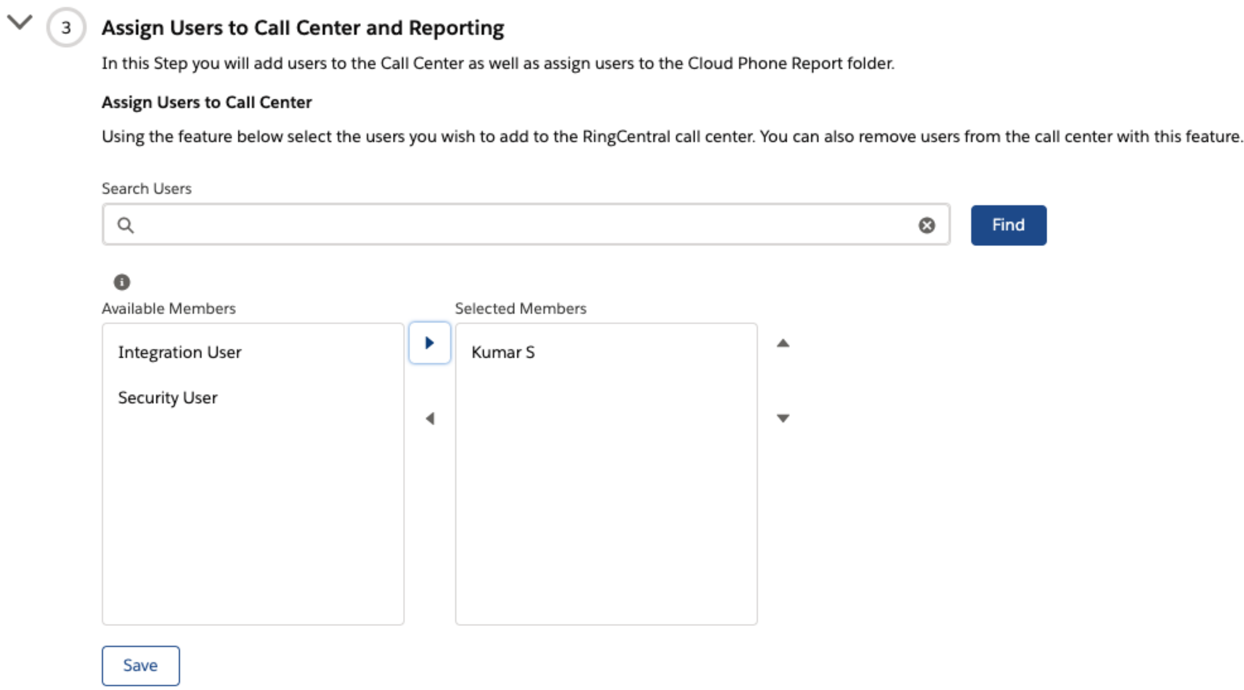
Note: The **Create Call Center** option will be disabled during upgrades. It will only be available when the application is installed for the first time.

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.

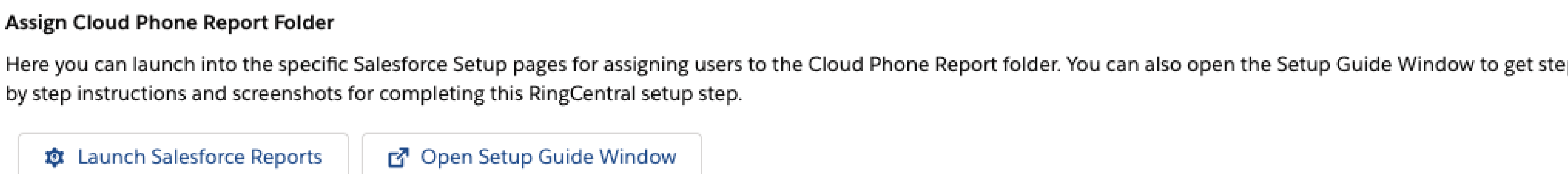
3. **Assign users to Call Center & Reporting**

   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.



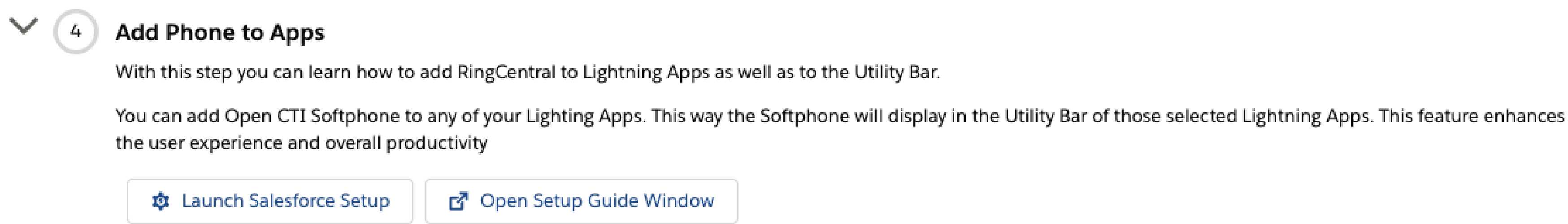
Now, you are all set, and your end users can start using the application. You can continue with the additional configurations as required for the organization.

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



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**.



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**.

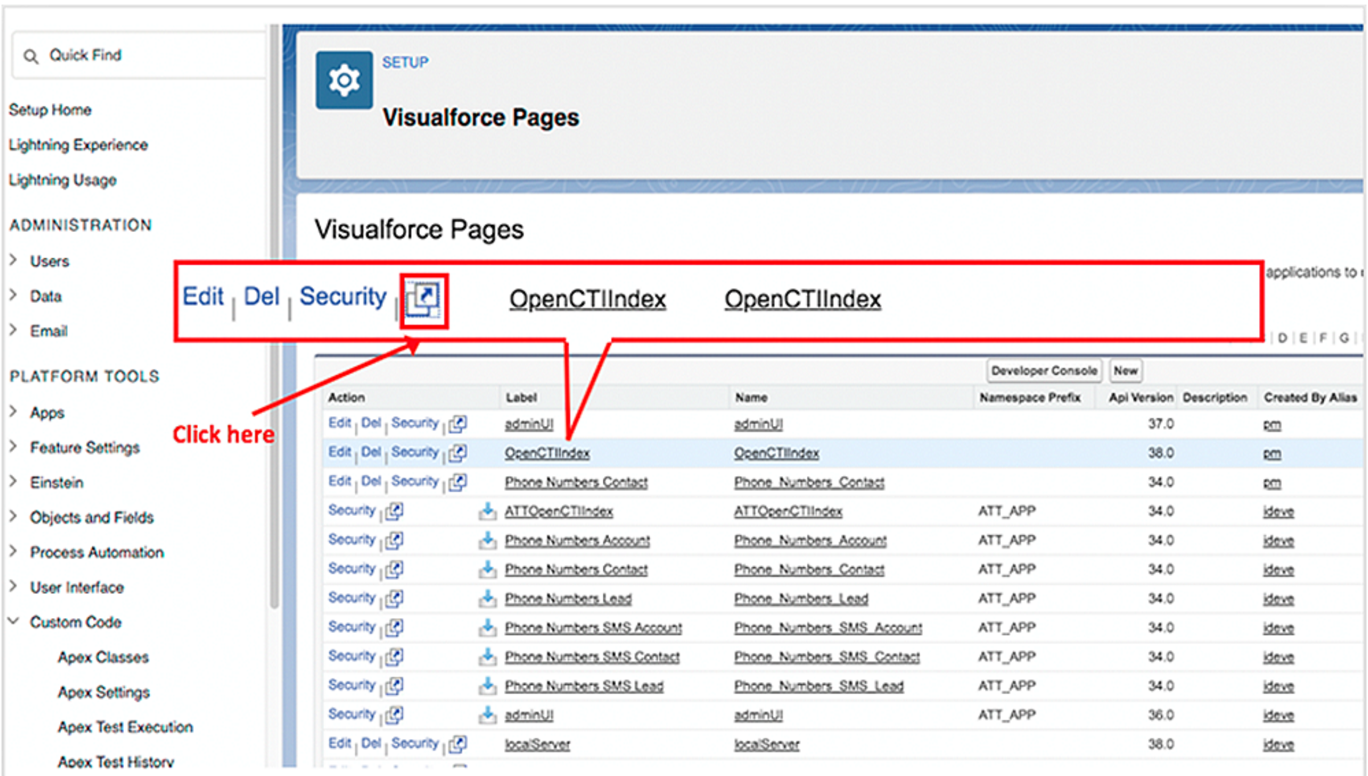


Figure 9

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**.

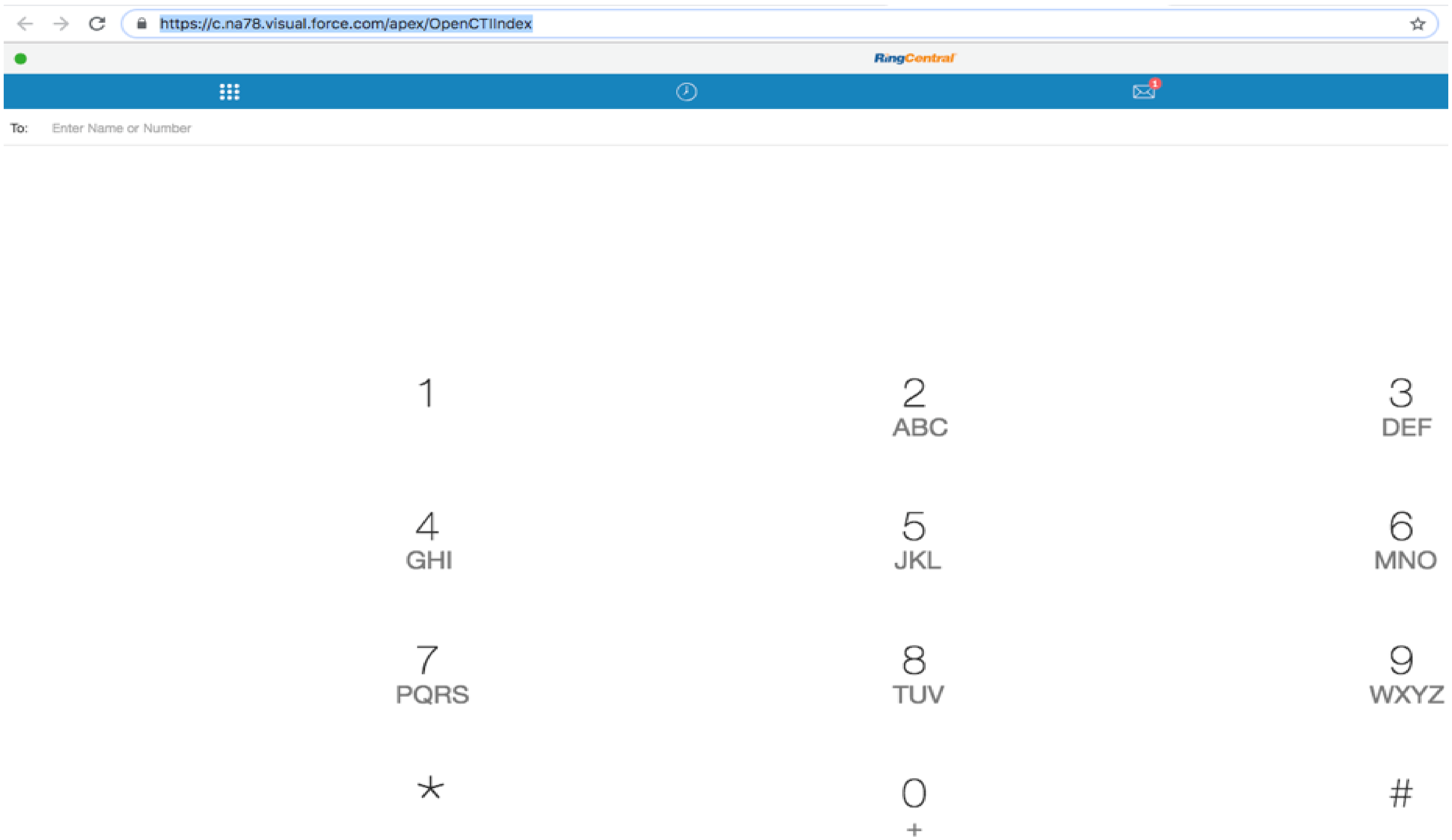


Figure 10

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

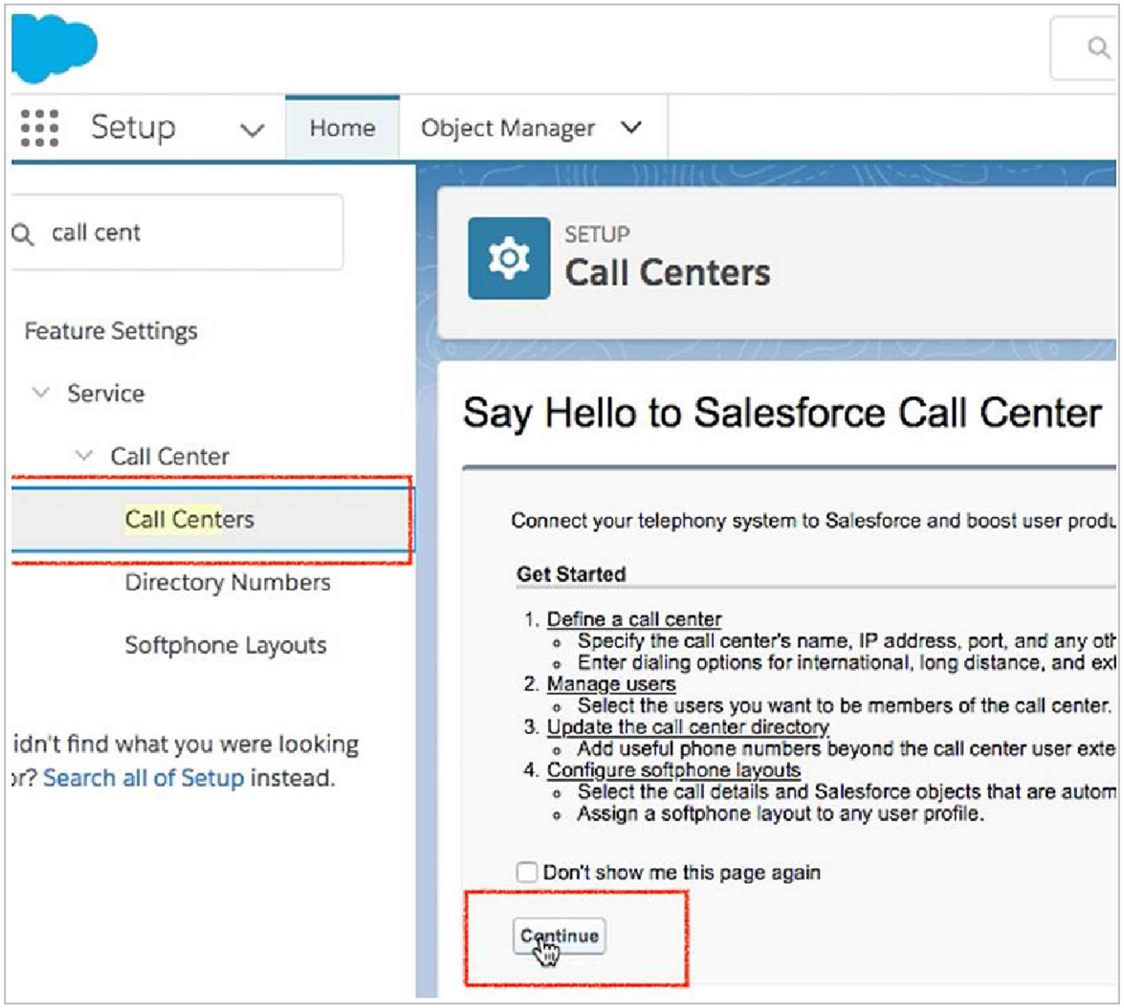


Figure 11

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

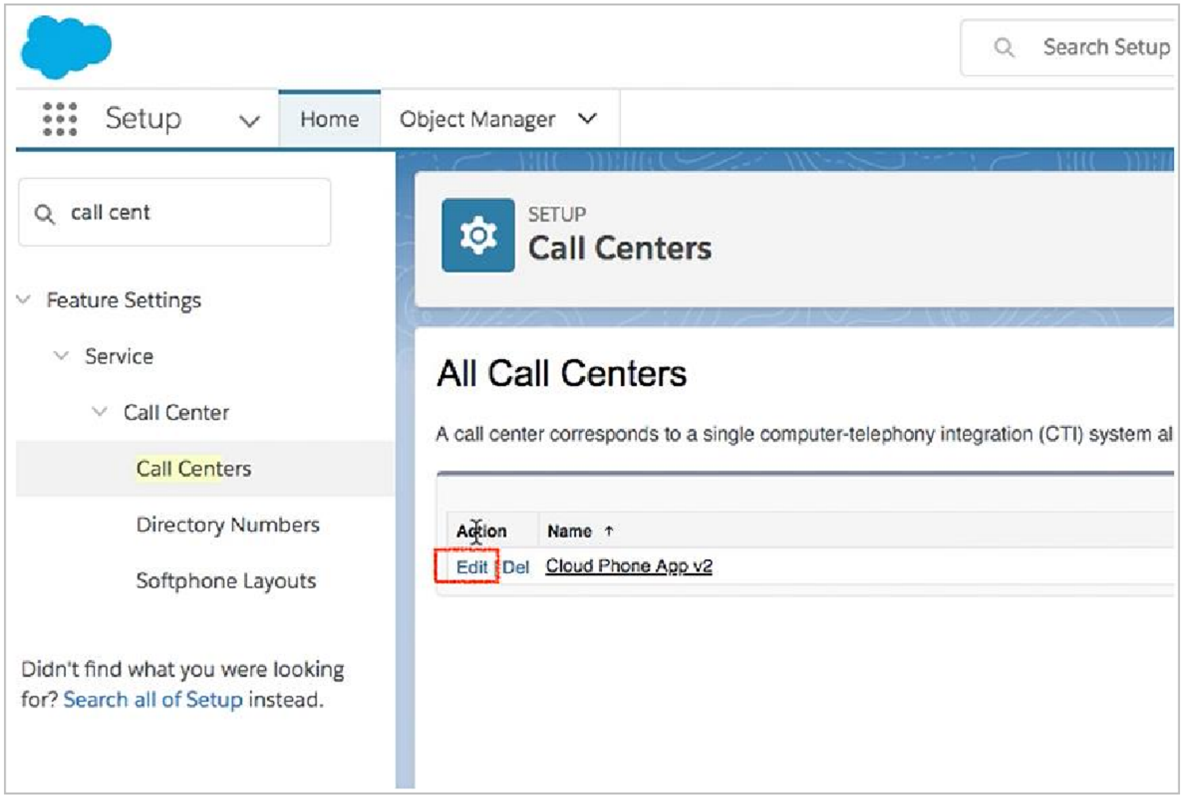


Figure 12

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

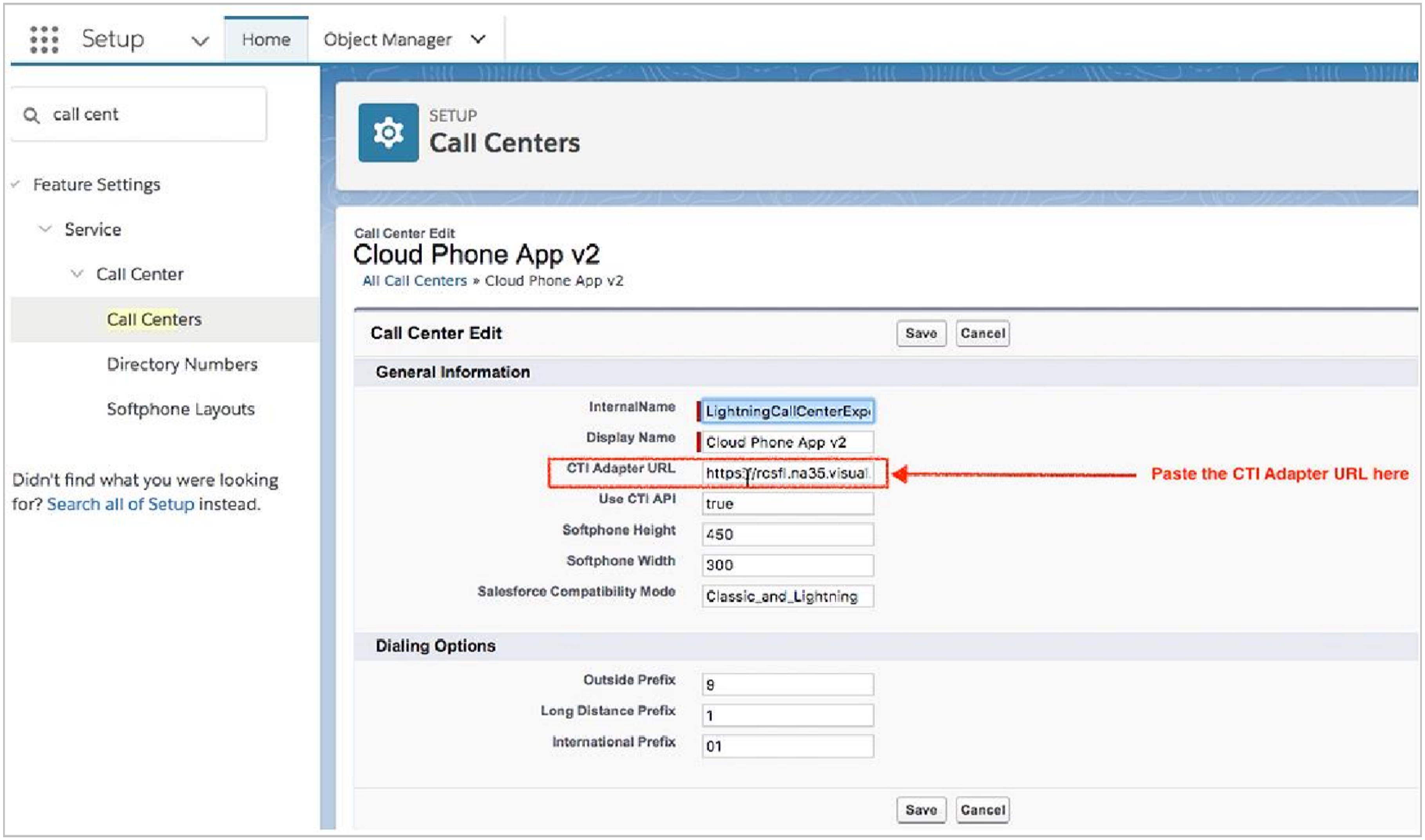


Figure 13

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.

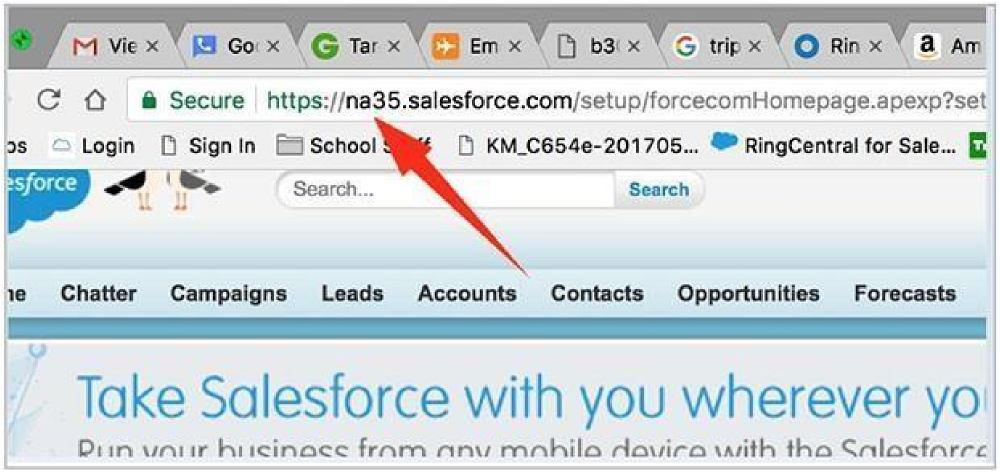


Figure 14

Step 3: Add Users to the Call Center.

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

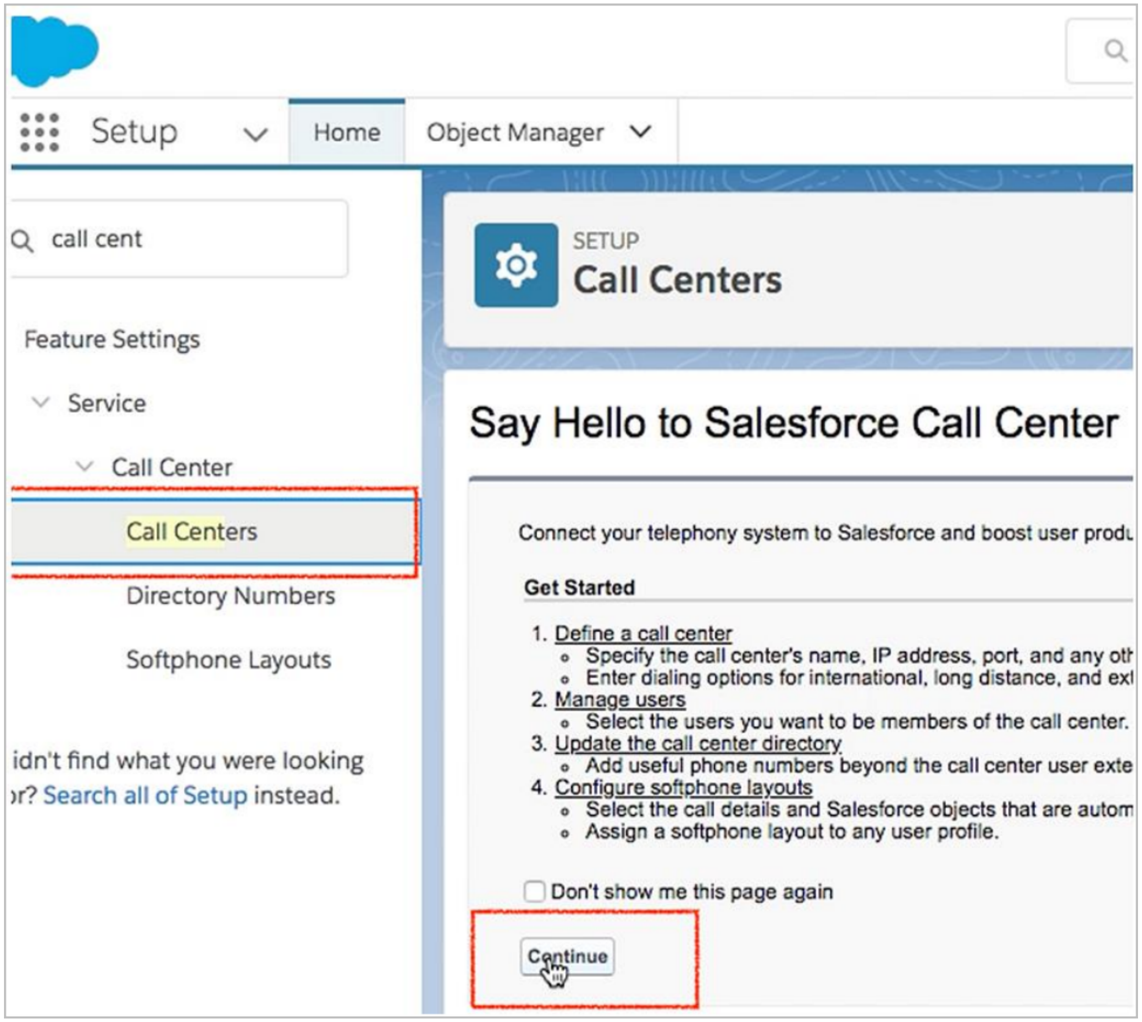


Figure 15

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.

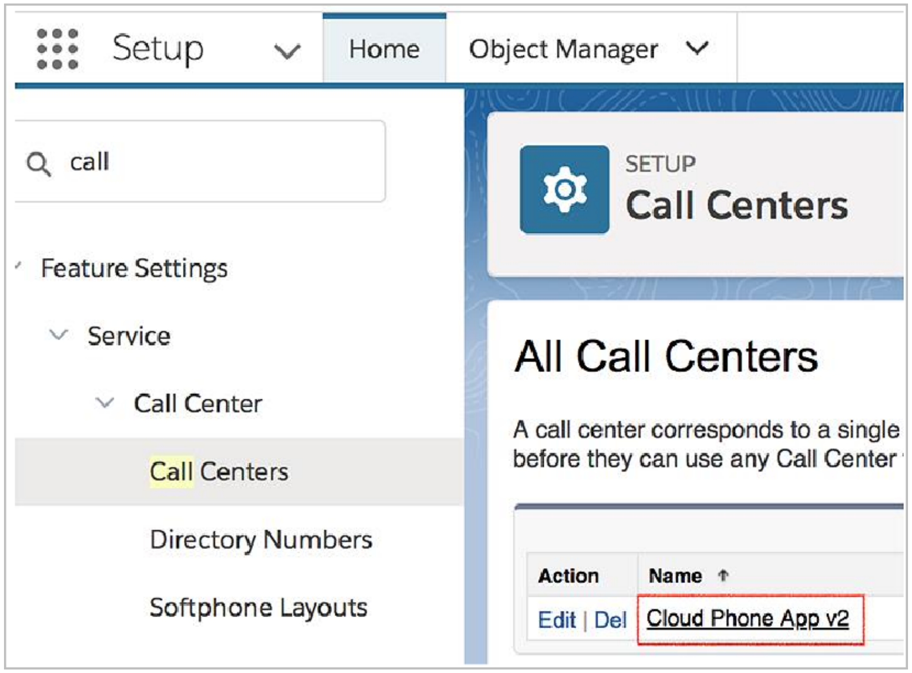


Figure 16

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.

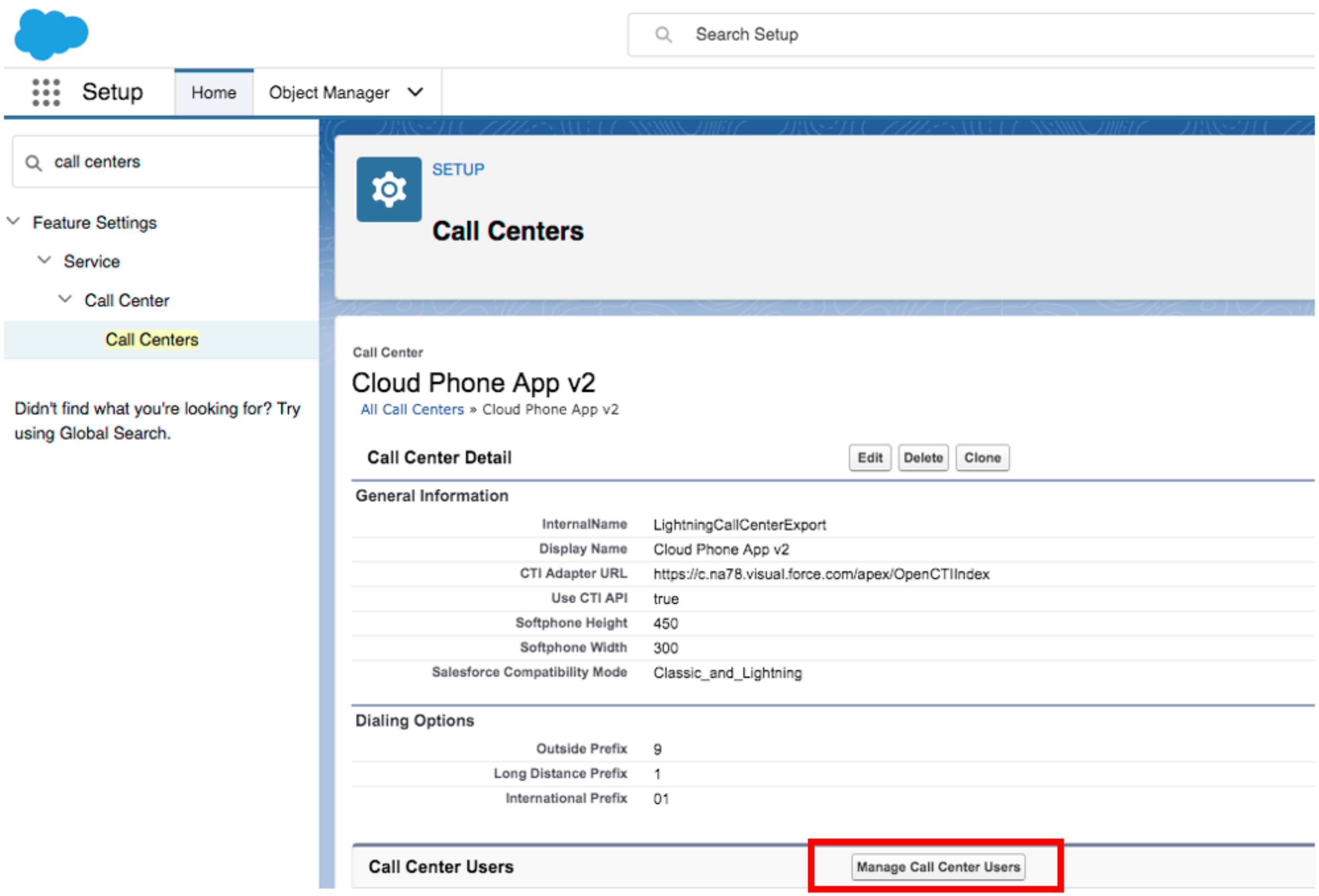


Figure 17


SETUP
Call Centers
Call Center
Cloud Phone App v2: Manage Users
All Call Centers » Cloud Phone App v2 » Manage Users
View: All
Create New View
Add More Users
Remove Users
Full Name
Alias
Username
No records to display.

Figure 18

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

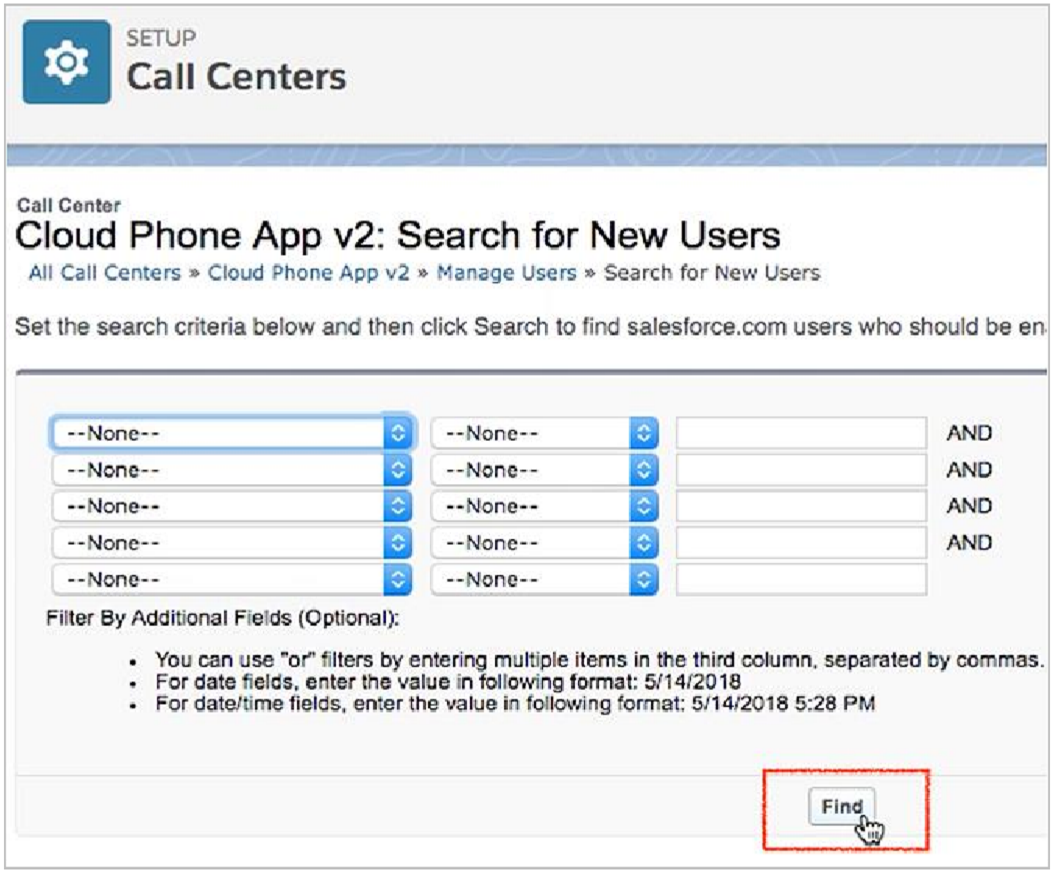


Figure 19

Setting up SoftPhone Layouts in Salesforce

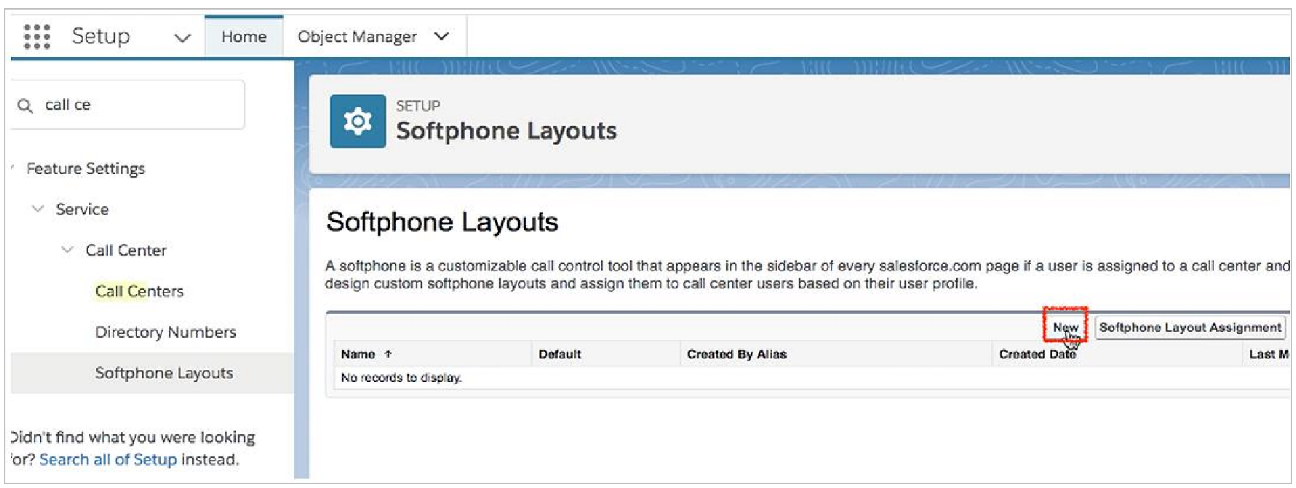
By default, the integration supports standard matching with the Account (and person account), Contact, Lead, Case, and Opportunity objects. The ability to match a phone number to a Salesforce record improves making and logging calls. When there's an incoming or outgoing call, the RingCentral for Salesforce 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.



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.

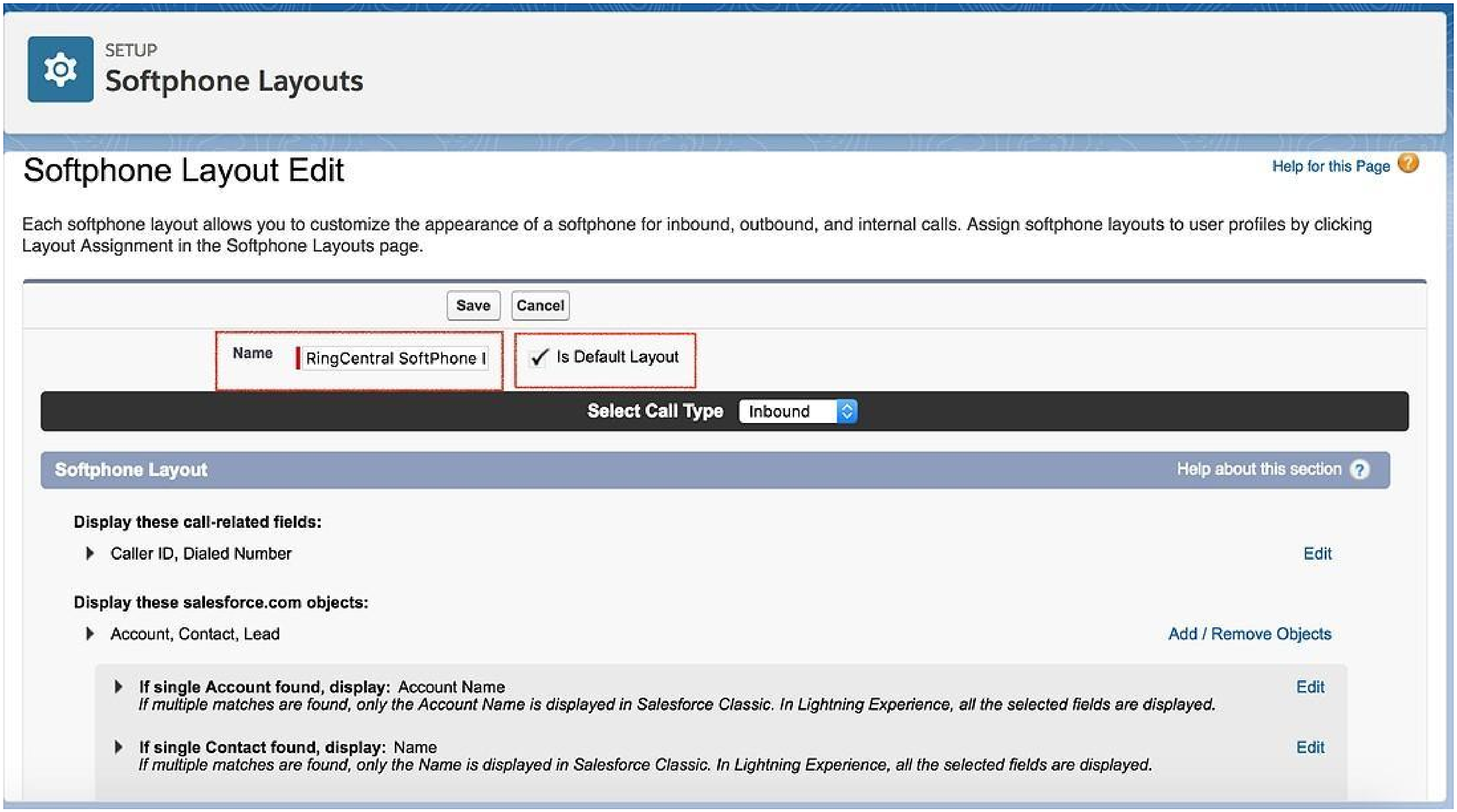


Figure 21

Also, select the other Softphone layout options.

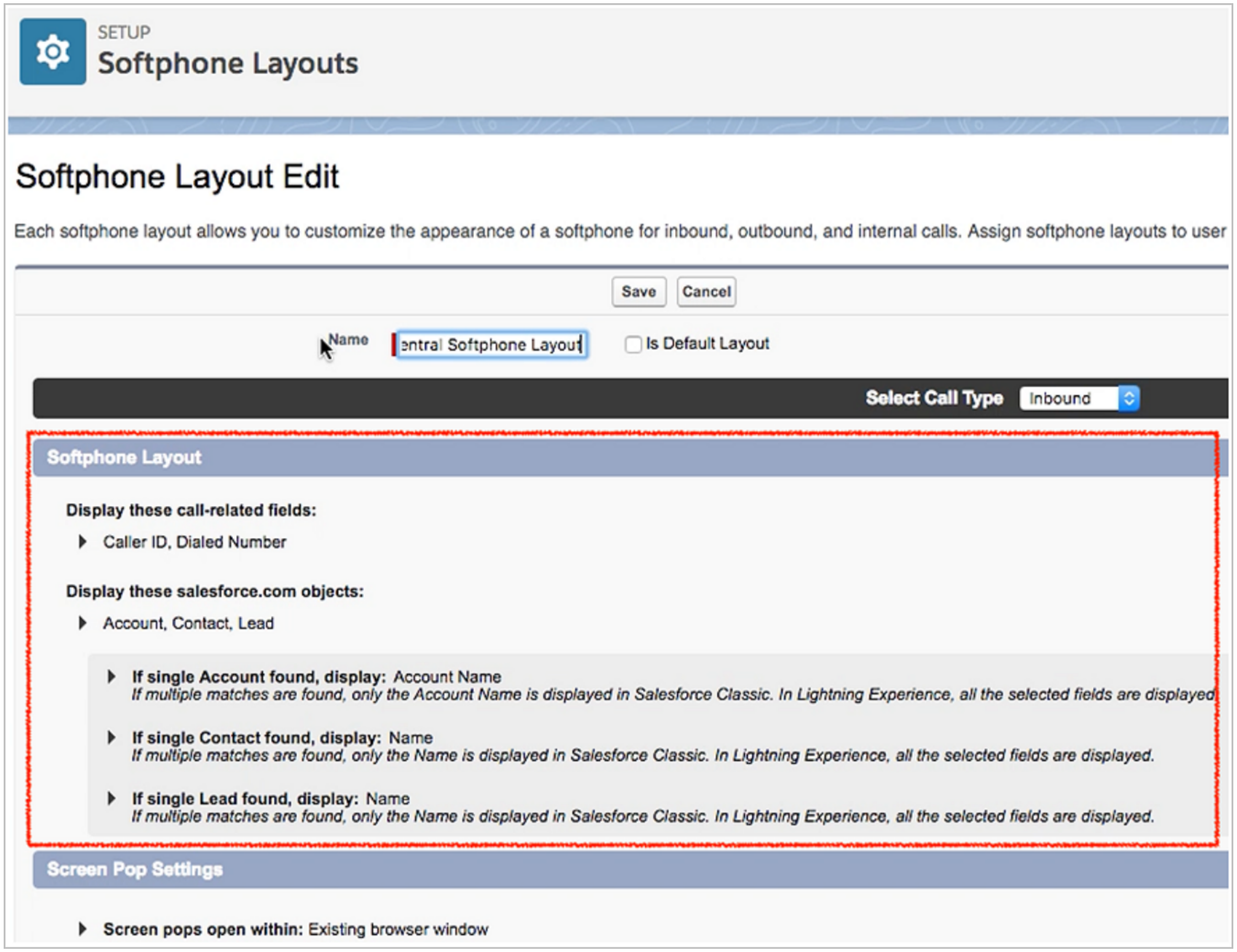


Figure 22

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.

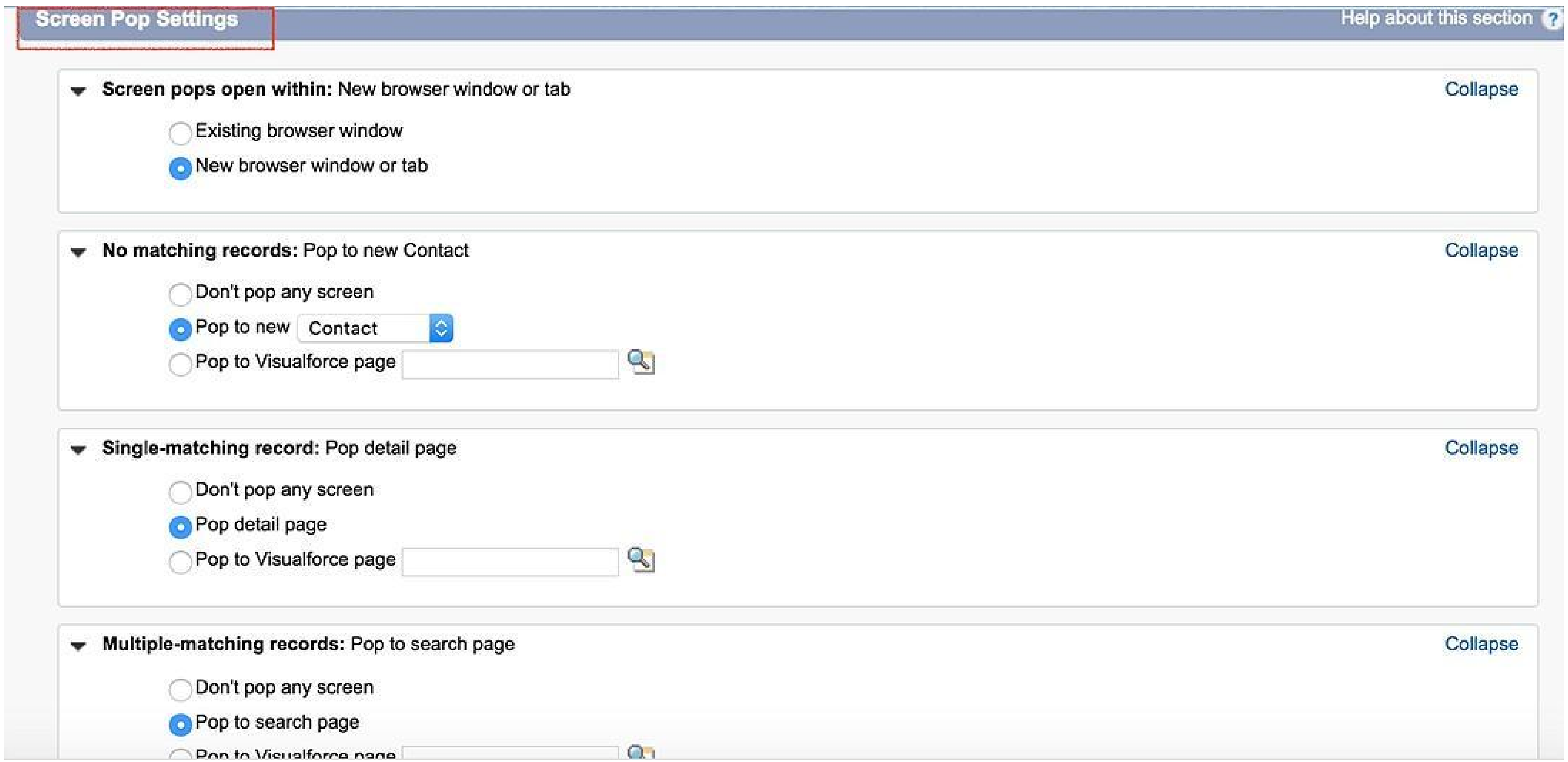
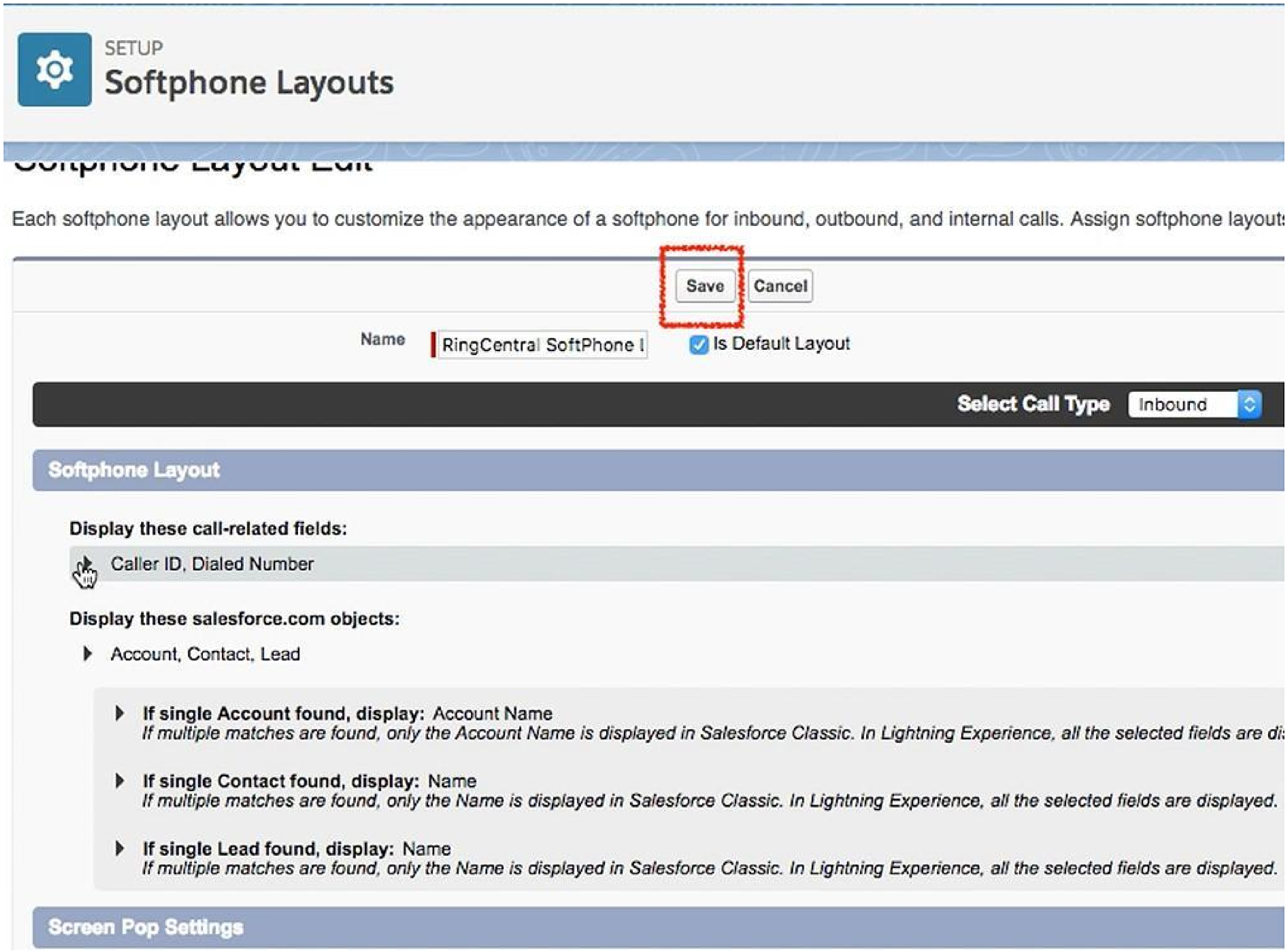


Figure 23

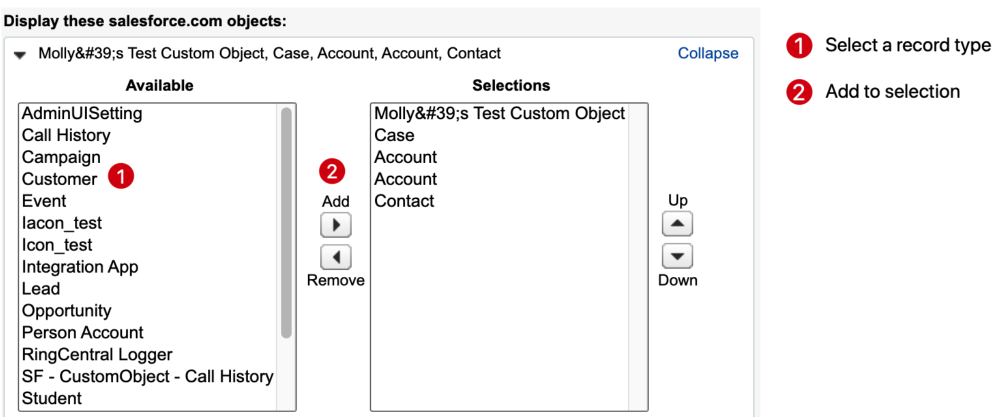
Click **Save** to save the Softphone layout.



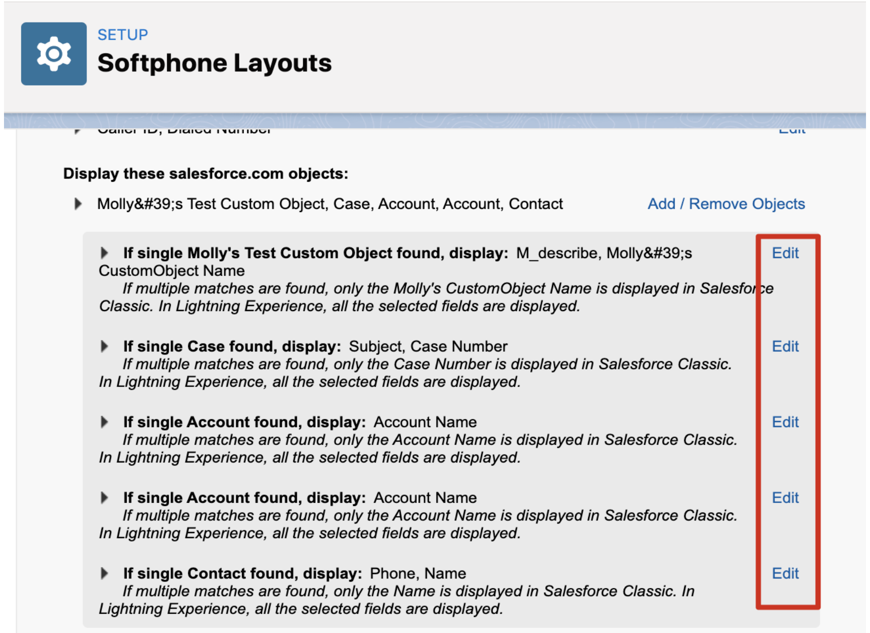
Step 2: Add custom objects to a SoftPhone layout (optional).

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

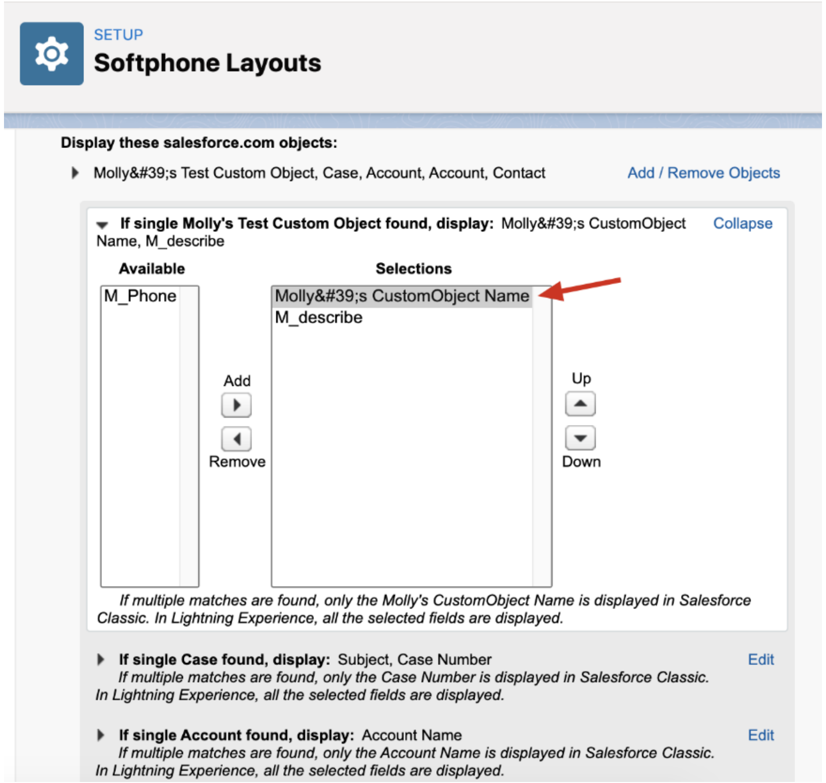
1. In the AdminUI, navigate to **Cloud Phone Settings > Settings for Matching Caller Details**, select **Custom Object Support**, and click **Save**.
2. Go back to the **Softphone Layouts** page and edit the layout from the **Edit** link in the **Action** column.
3. Select the *Inbound* call type from 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.



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



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


SETUP
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
Molly's CustomObject Name
M_describe
Add
Remove
Up
Down
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**.

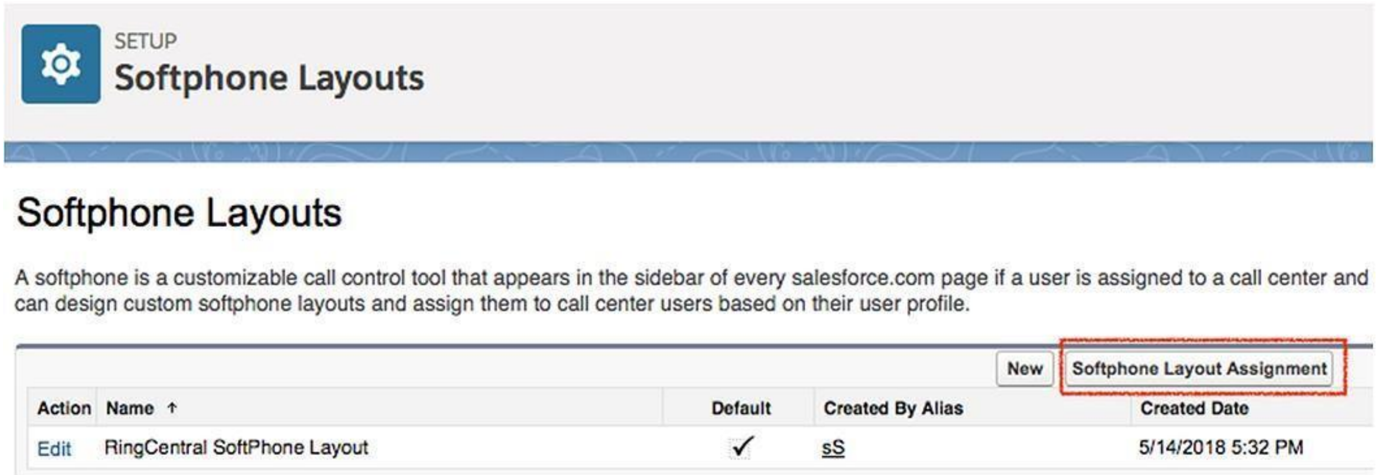


Figure 25

Assign the Softphone Layout to the relevant profiles.

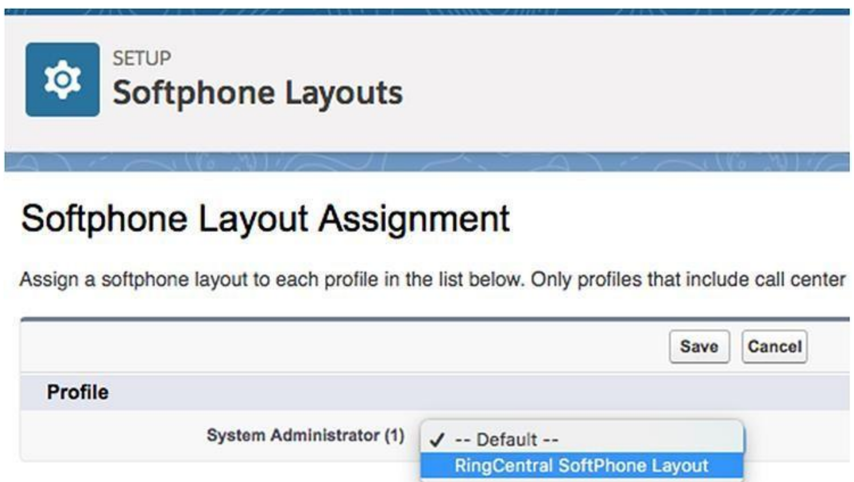


Figure 26

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

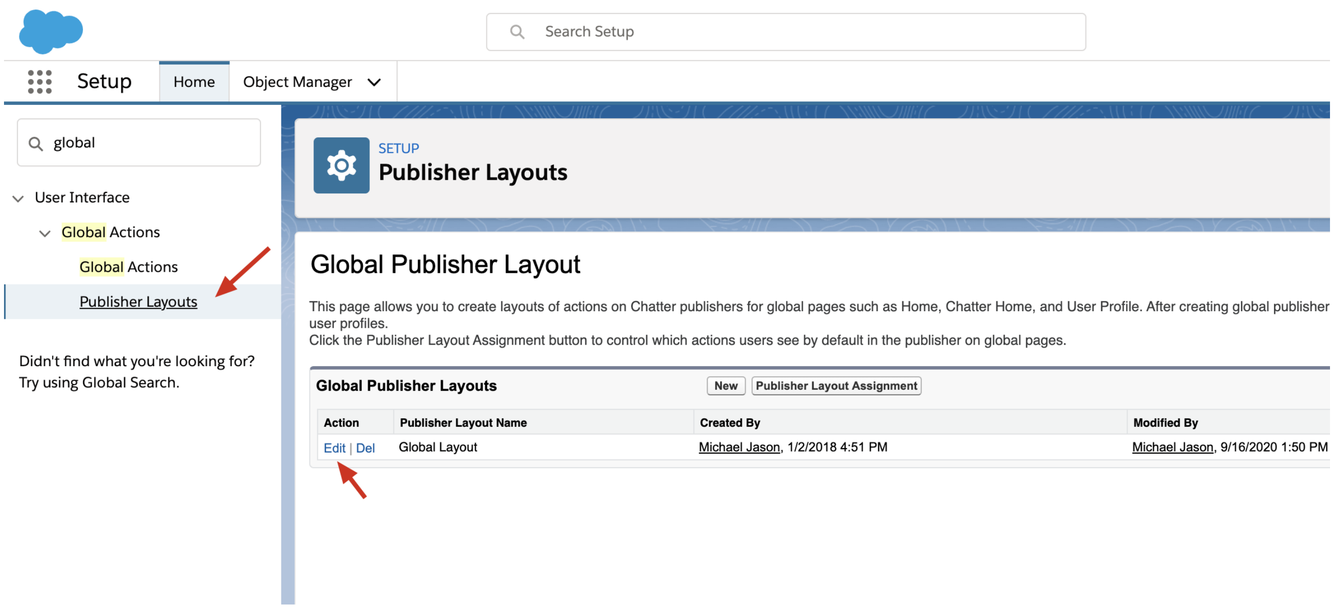
Setting up Global Action Layout in Salesforce

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**.

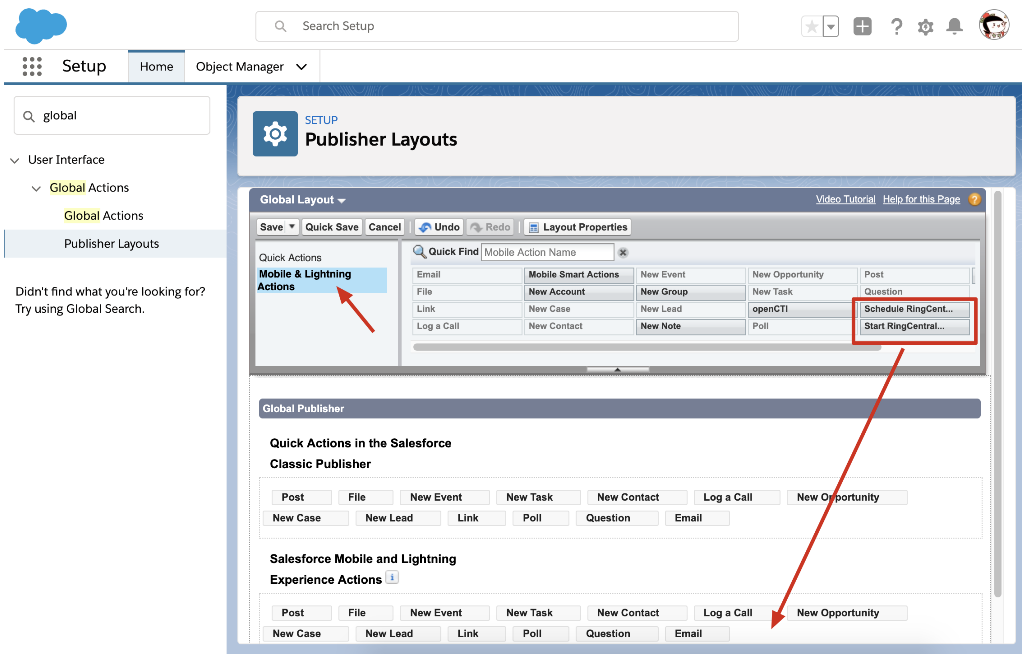


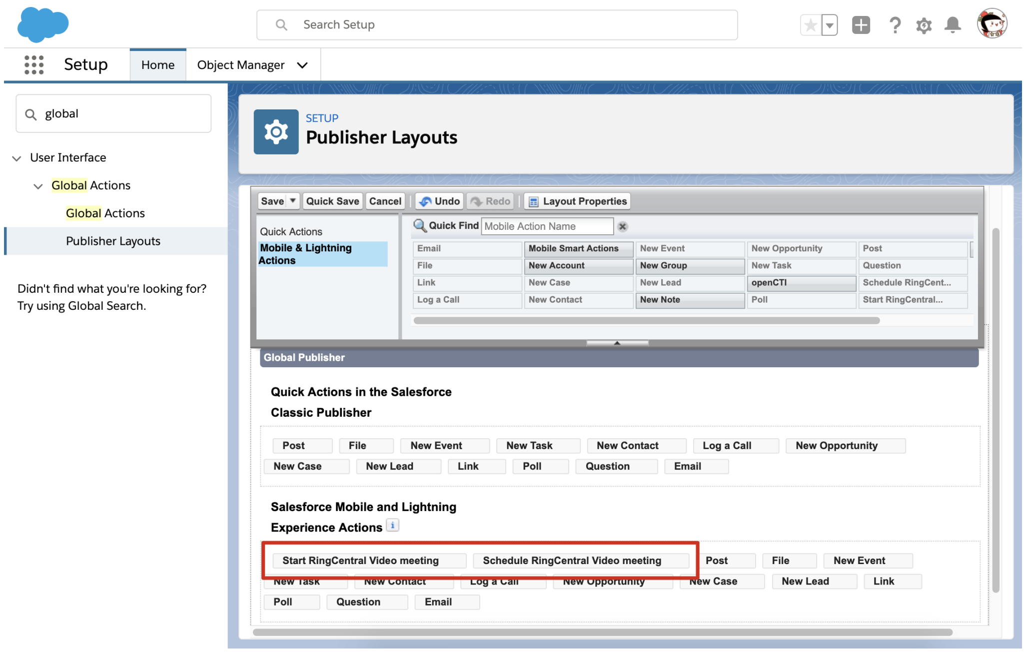
Step 2 Configure the Layout

Click the Mobile and Lighting 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.

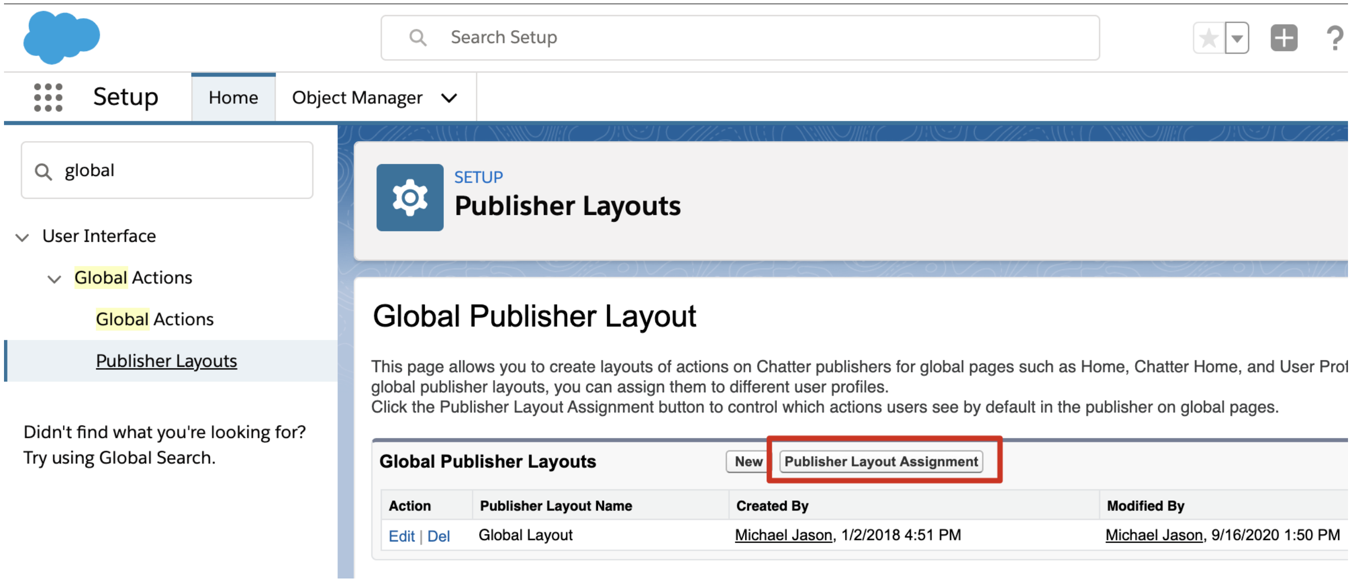
Click **Save**.


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
Video Tutorial
Help for this Page
Save
Quick Save
Cancel
Undo
Redo
Layout Properties
Quick Actions
Mobile & Lightning Actions
Quick Find
Mobile Action Name
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



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.


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 Publisher Layout
This page allows you to create layouts of actions on Chatter publishers for global pages such as Home, Chatter Home, and User Prof
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.

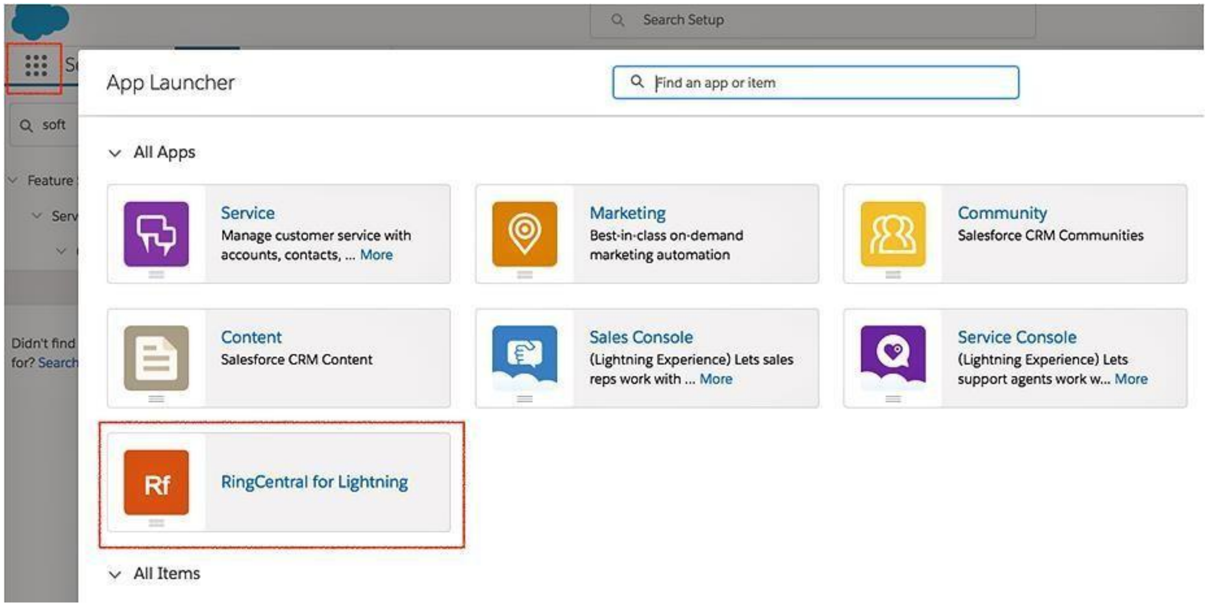


Figure 27

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

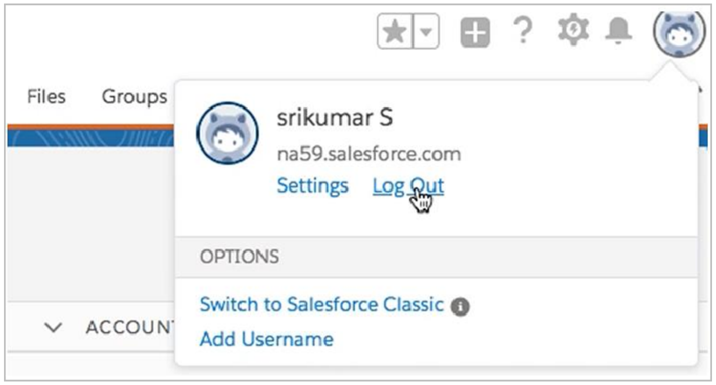


Figure 28

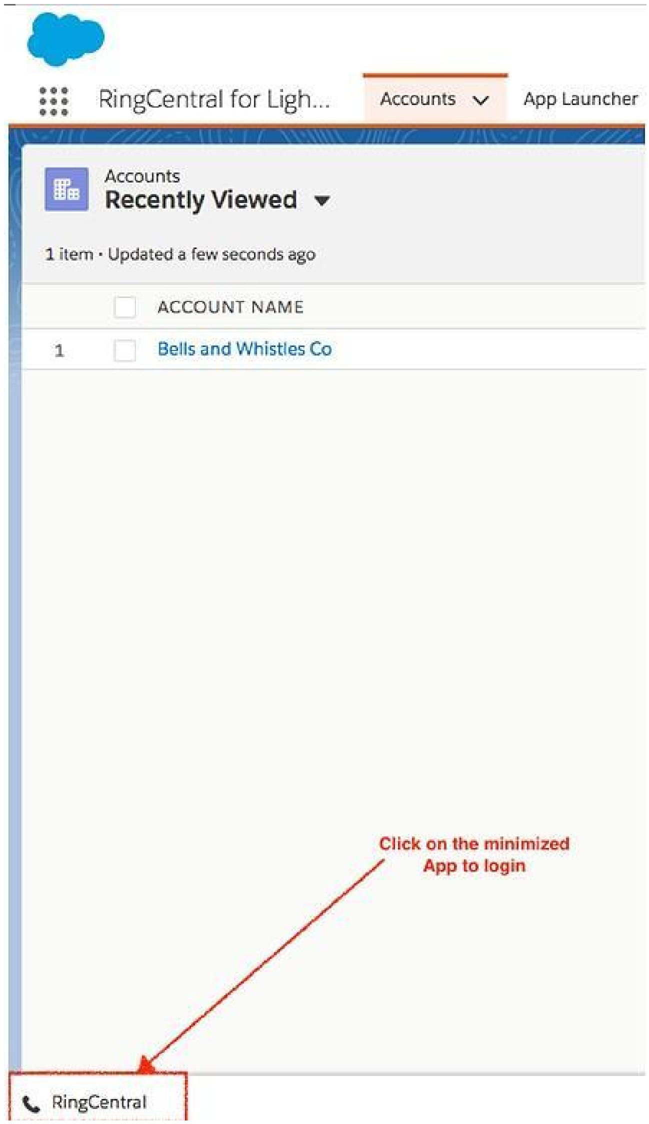


Figure 29

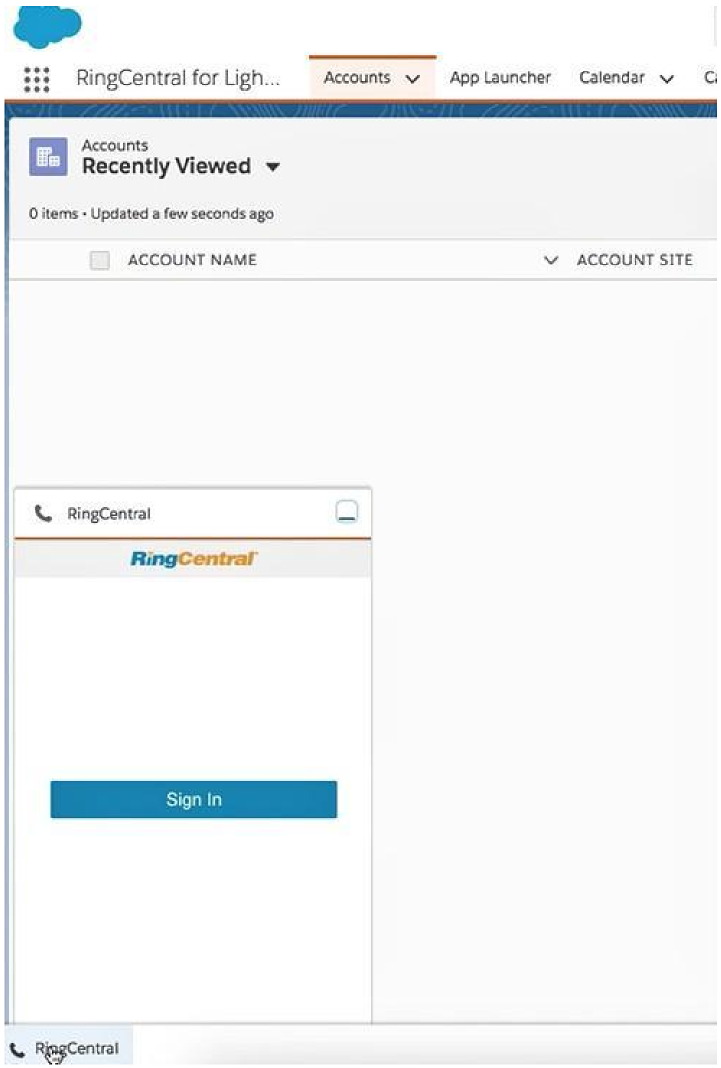
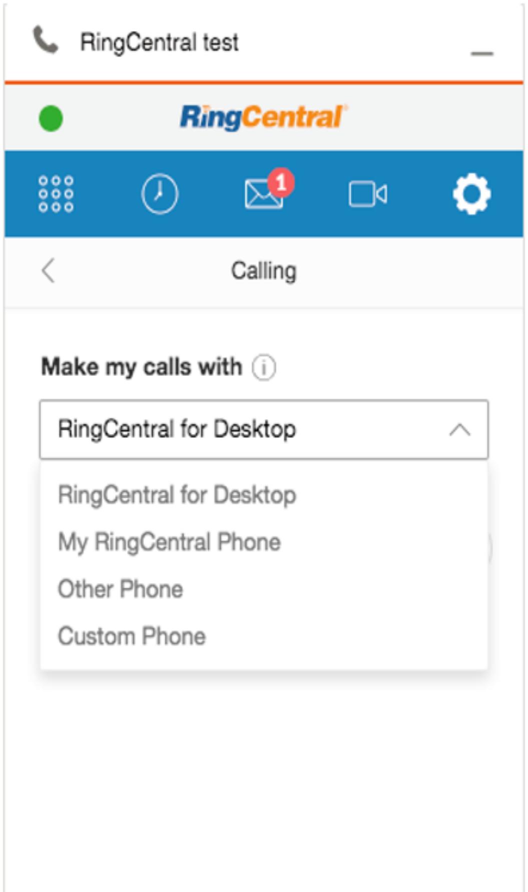


Figure 30

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



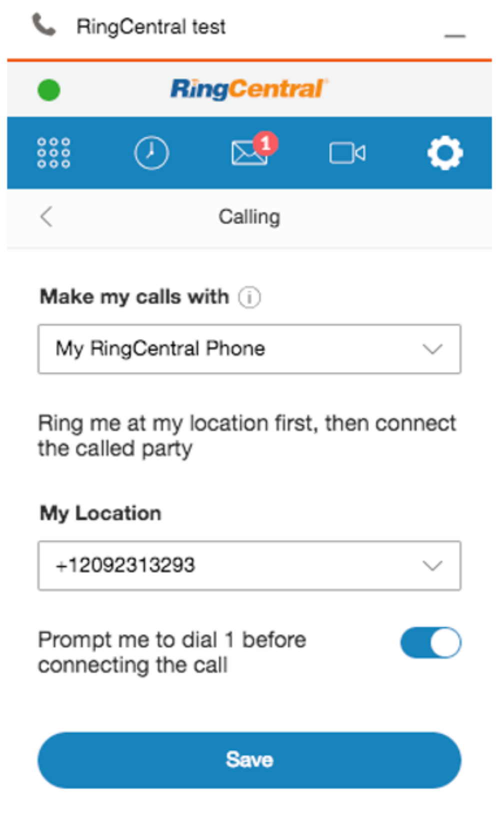


Figure 31

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 Lighting apps. Navigate to **All Setup > Apps > App Manager**.

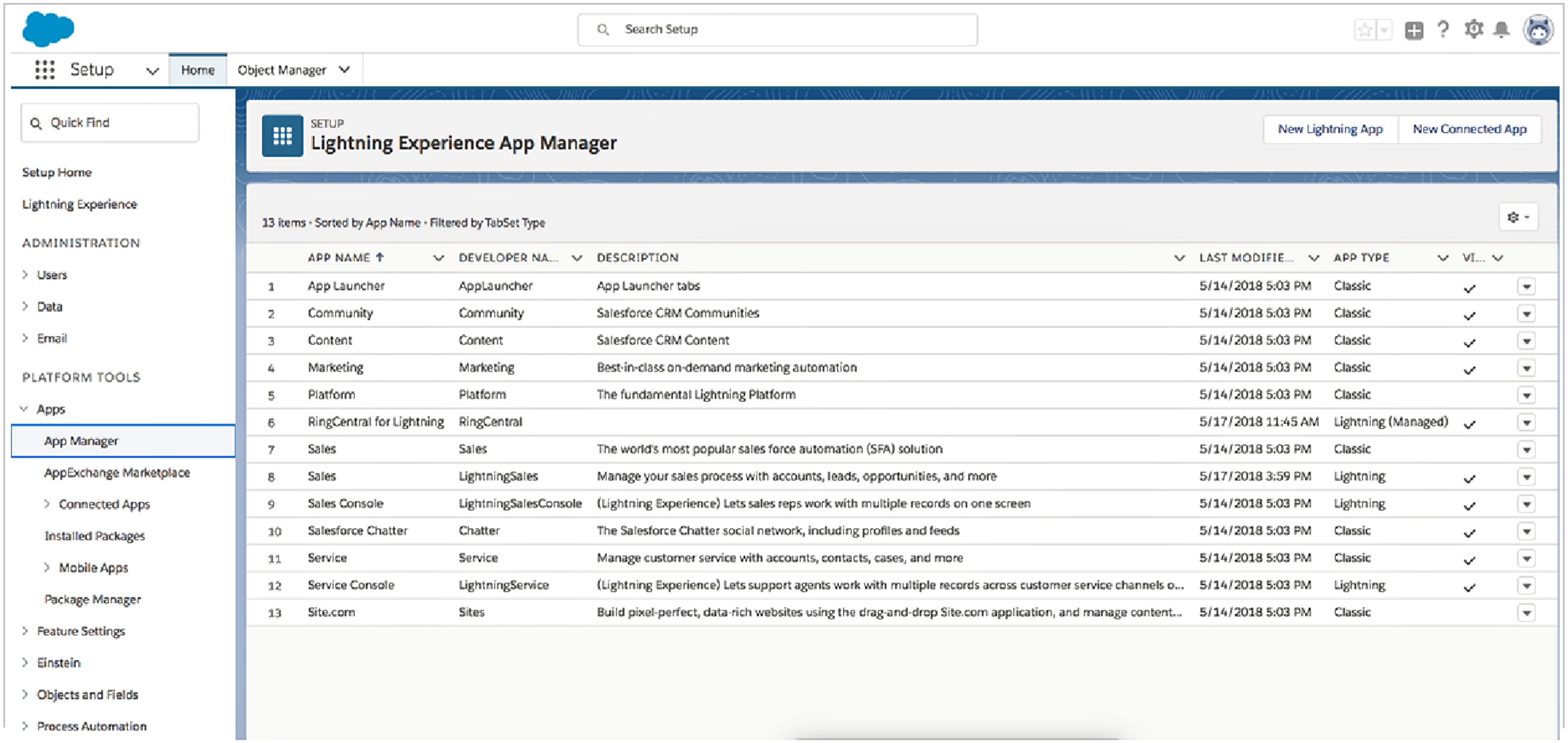


Figure 33

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

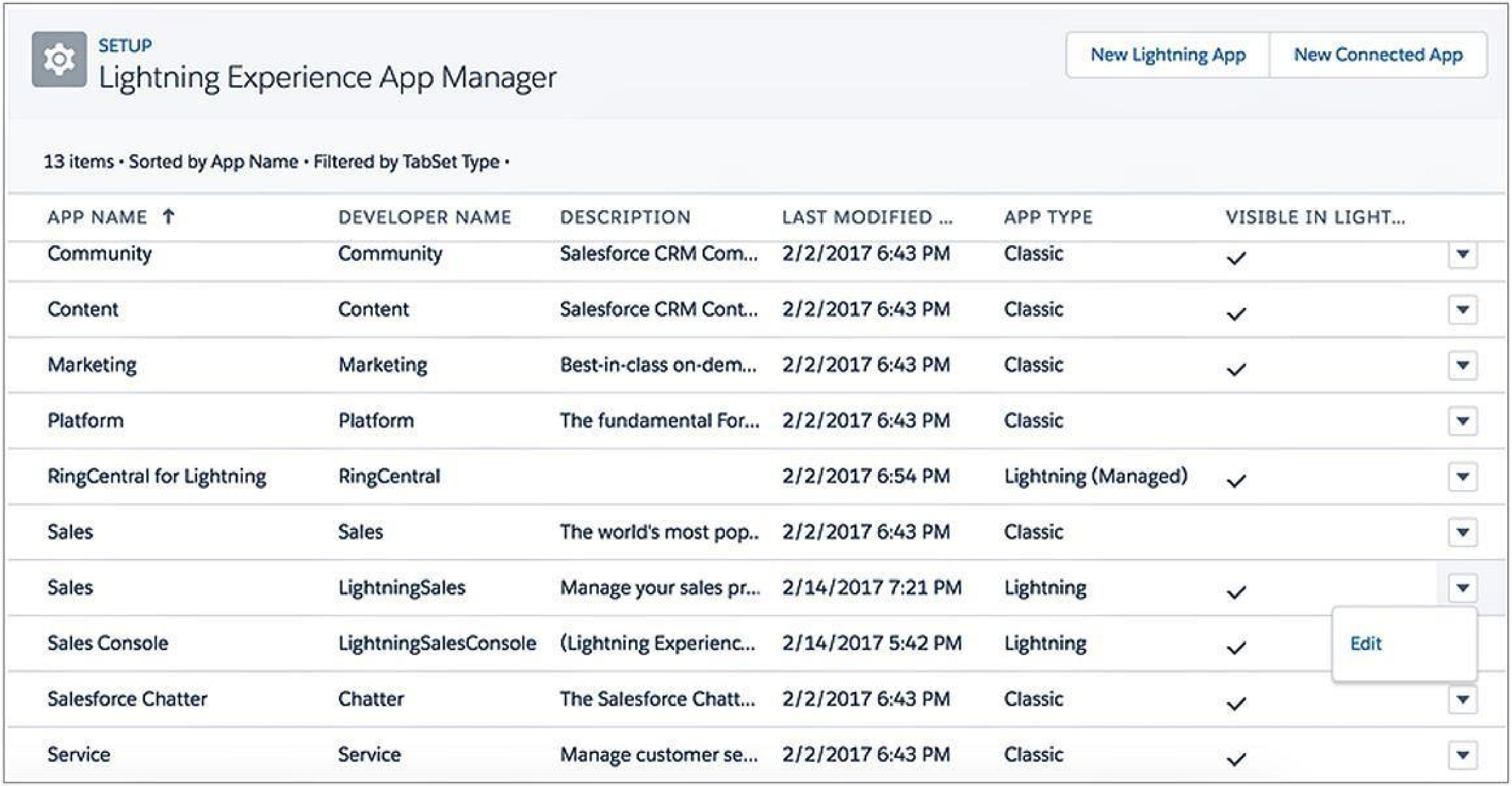


Figure 34

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

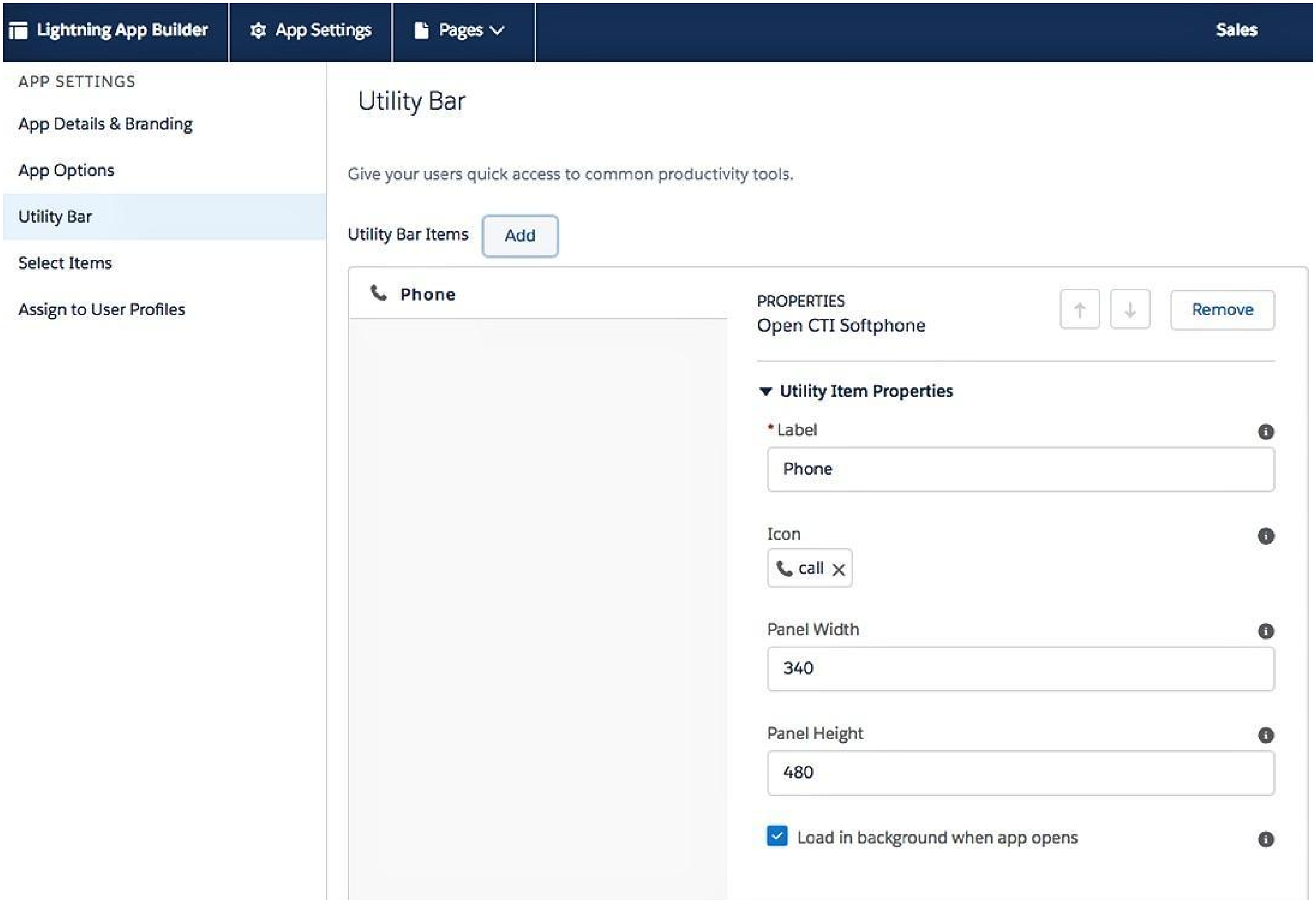


Figure 35

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

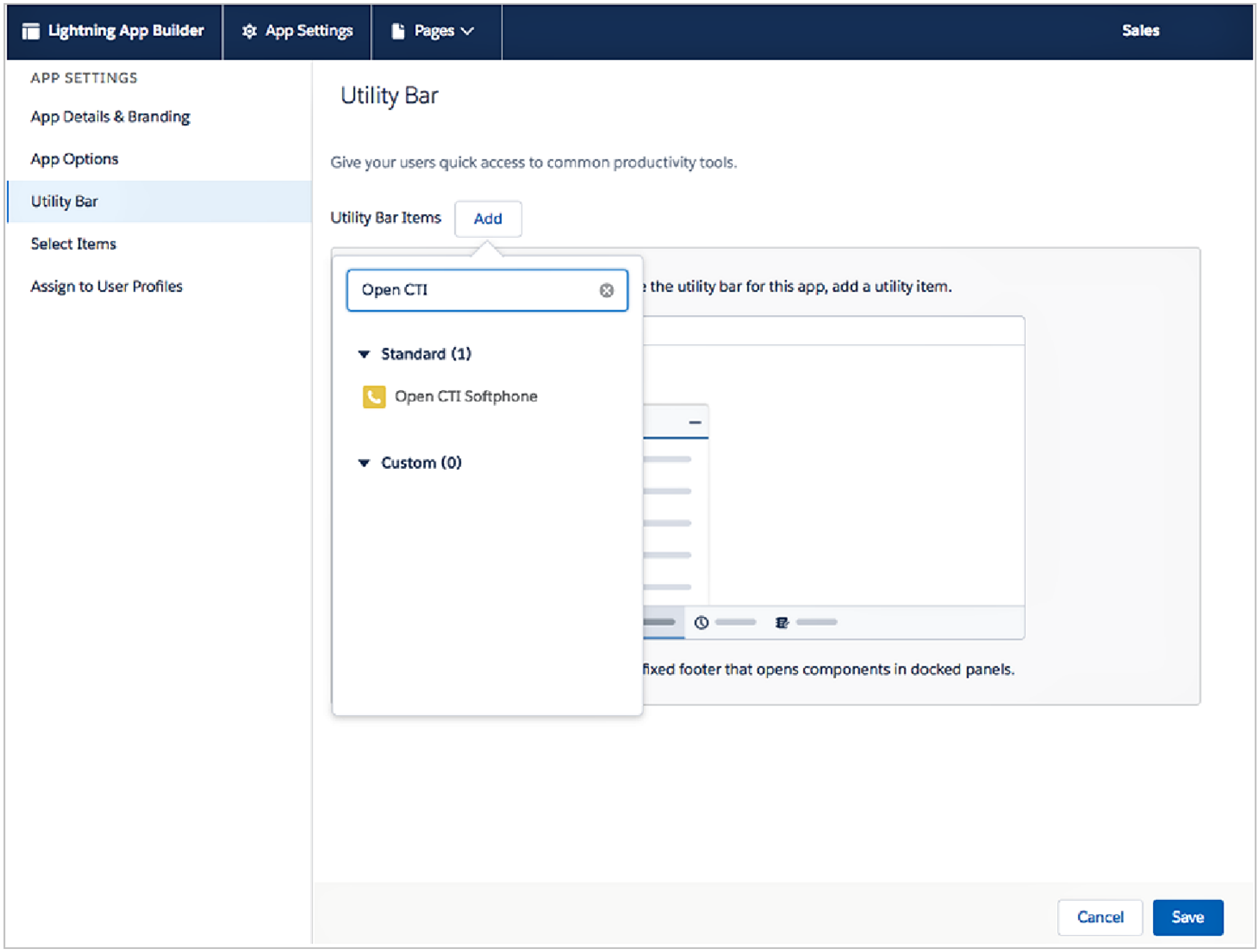


Figure 36

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

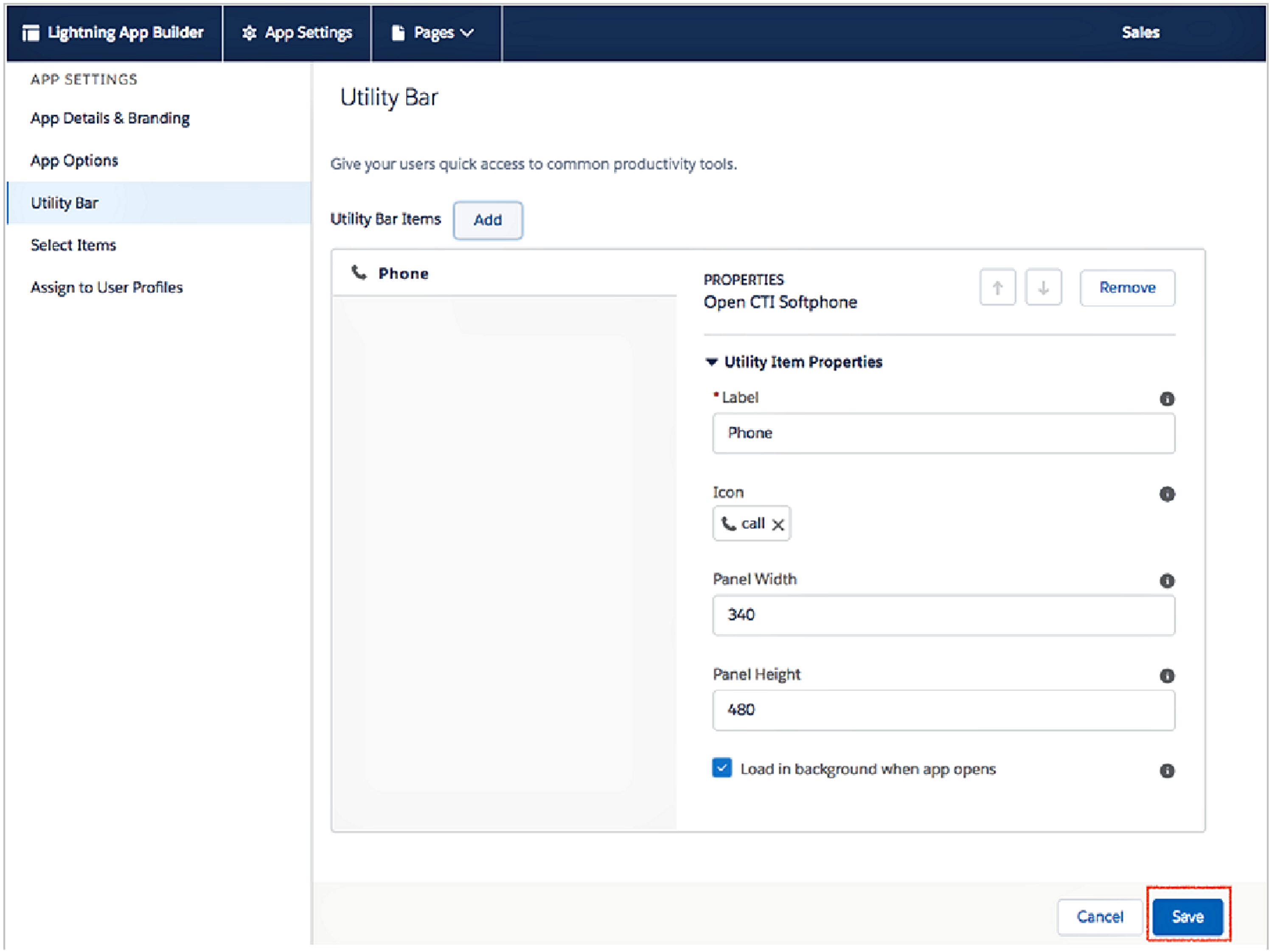


Figure 37

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.

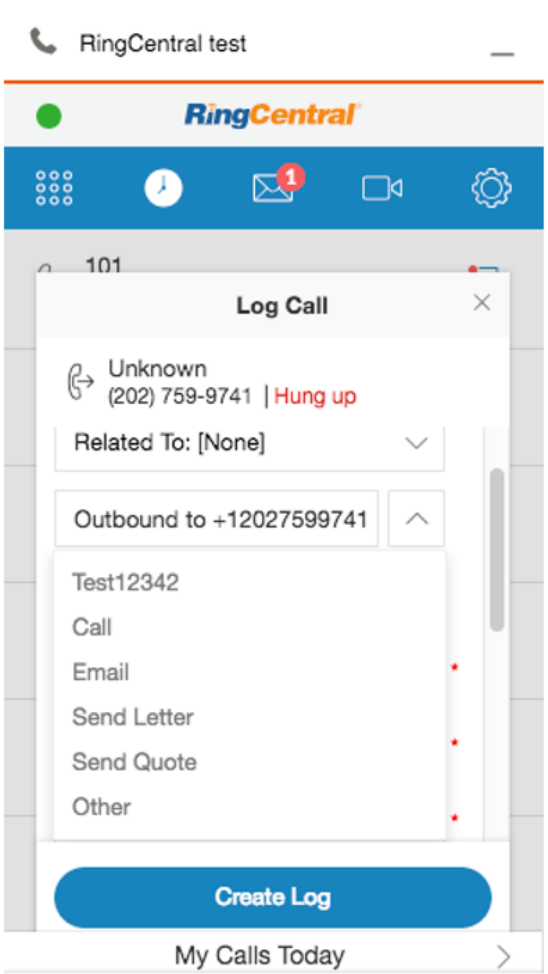


Figure 38

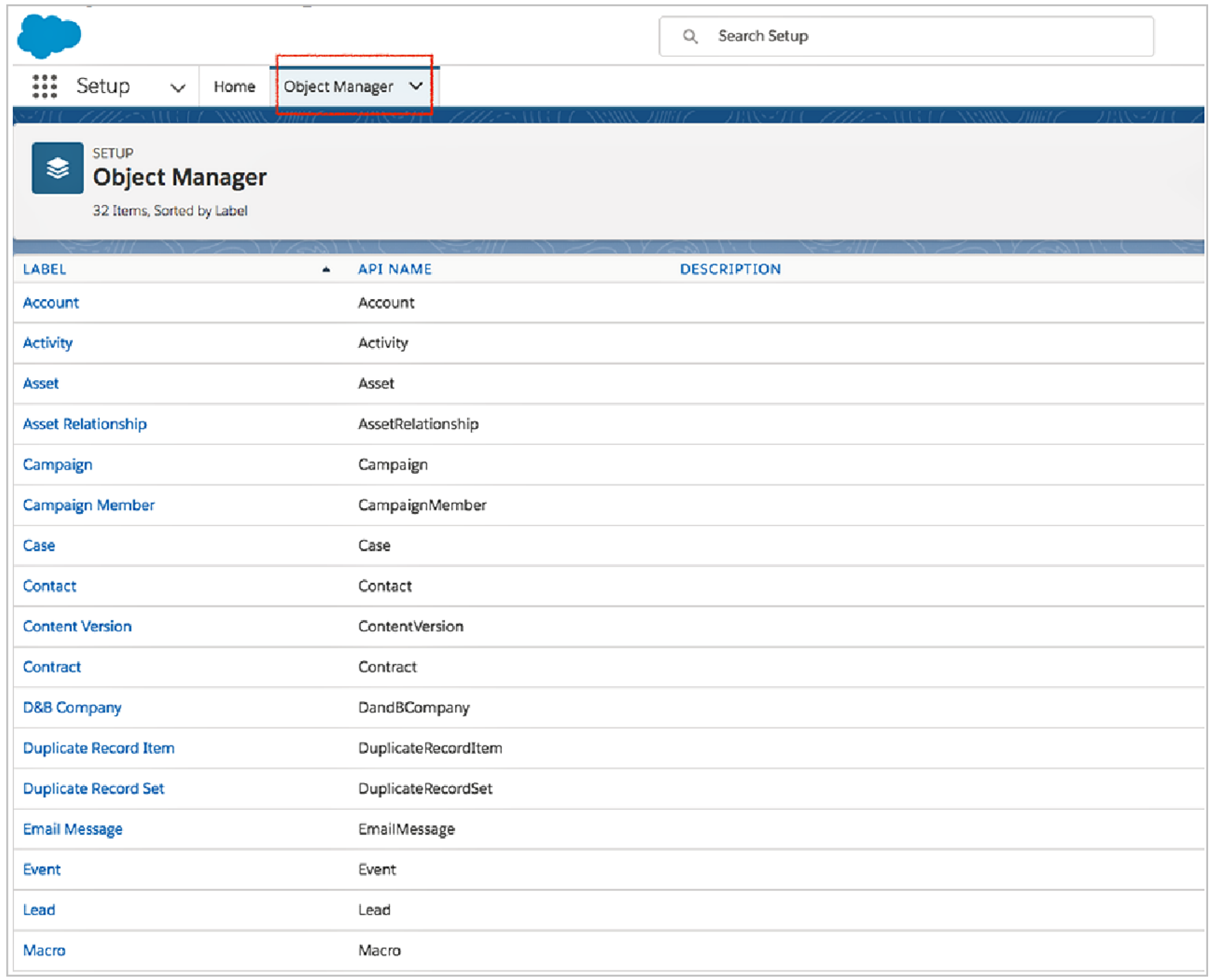


Figure 39

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 > T asks > Fields & Relationships > Subject**.

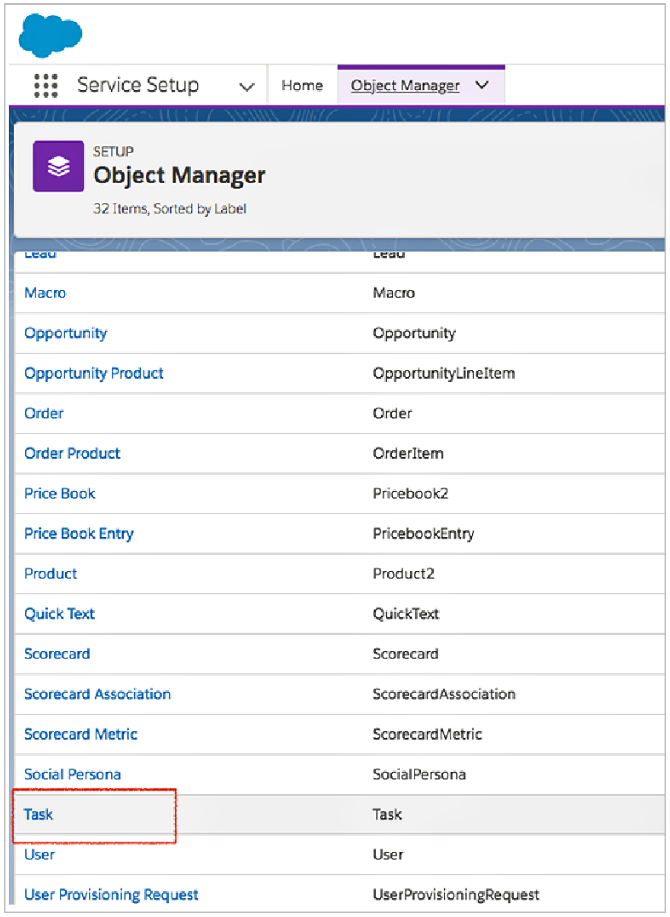


Figure 40

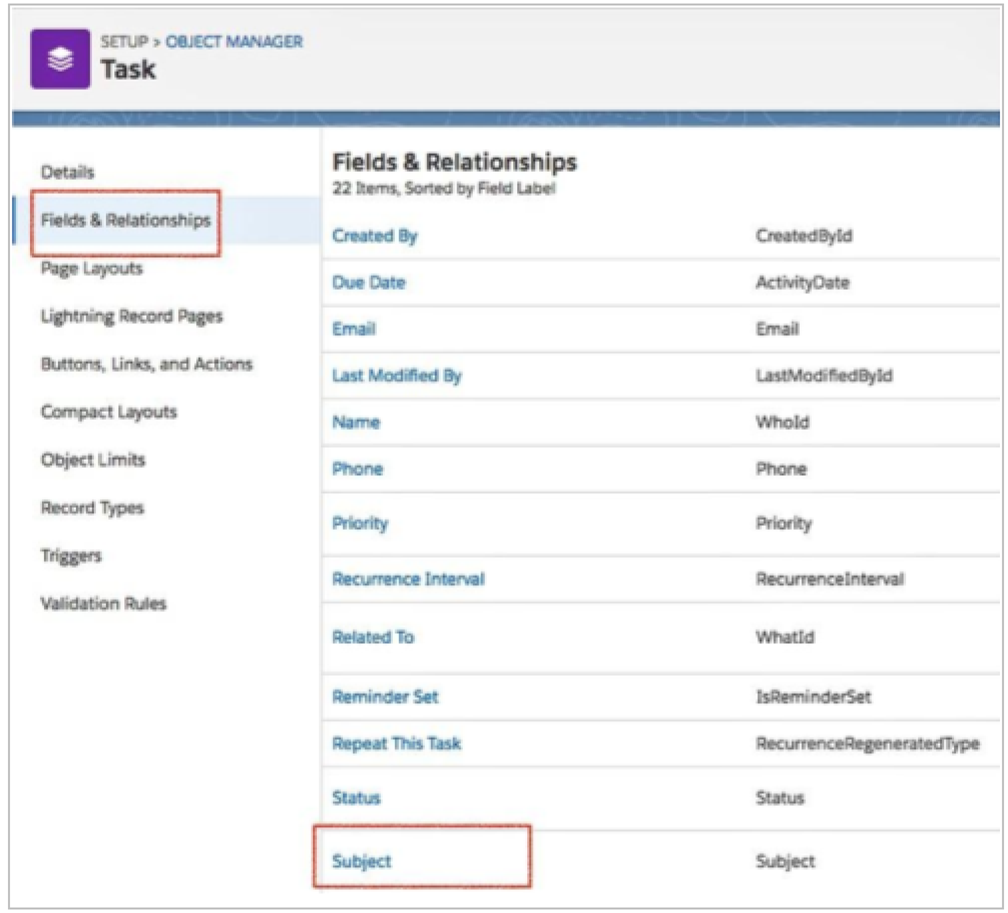


Figure 41

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

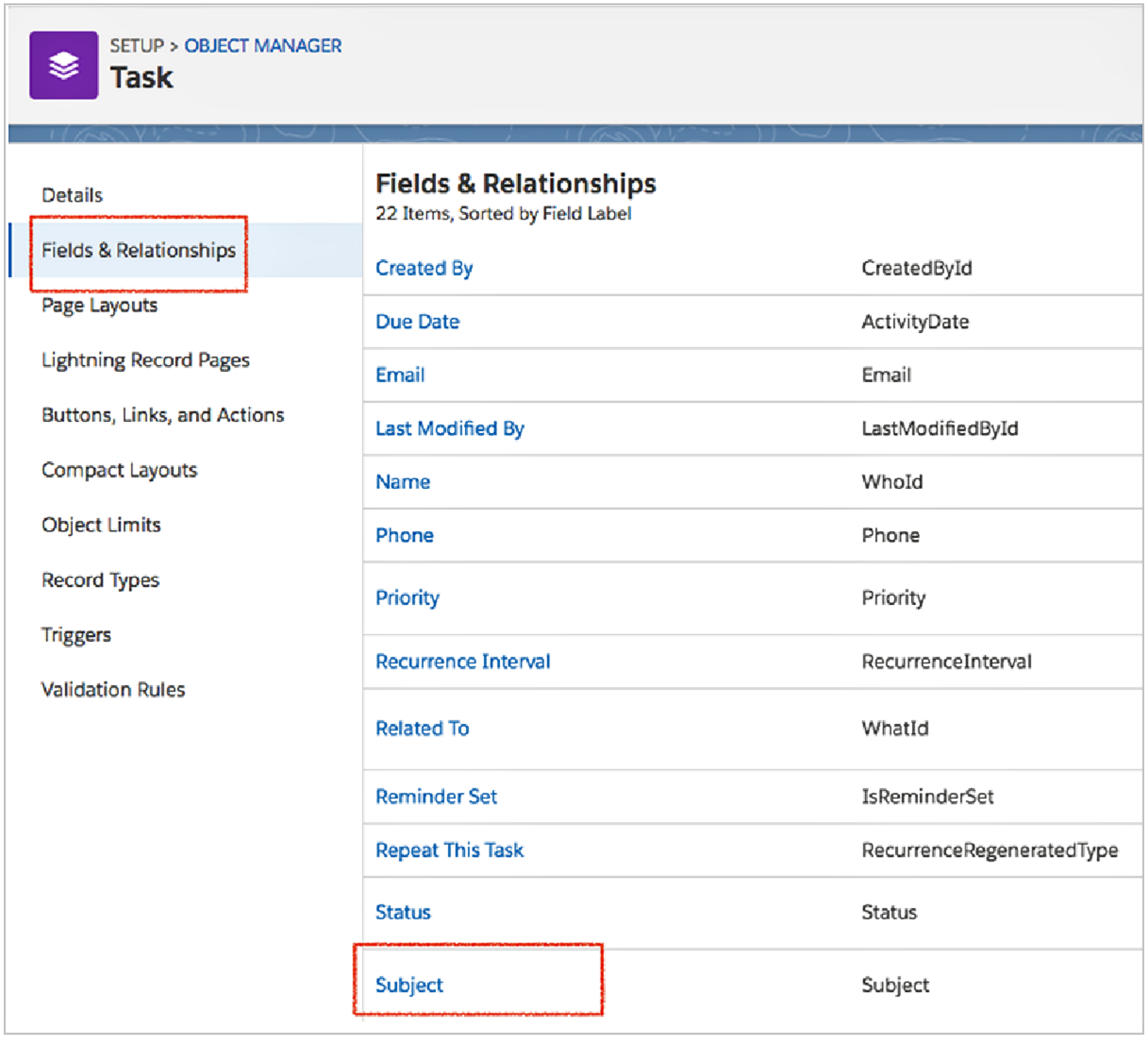


Figure 42

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.

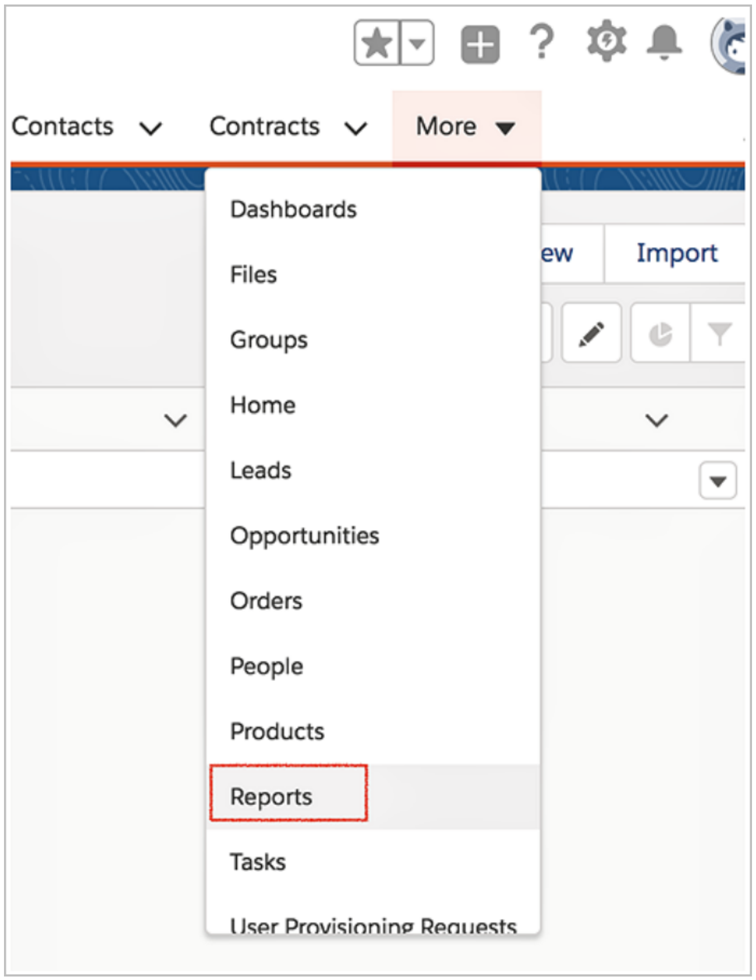


Figure 43

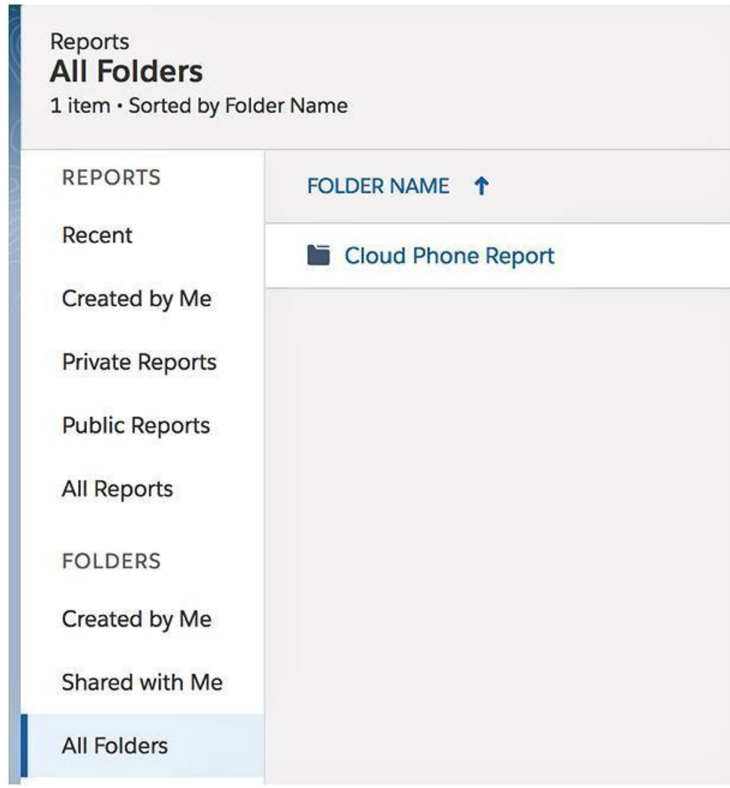


Figure 44

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

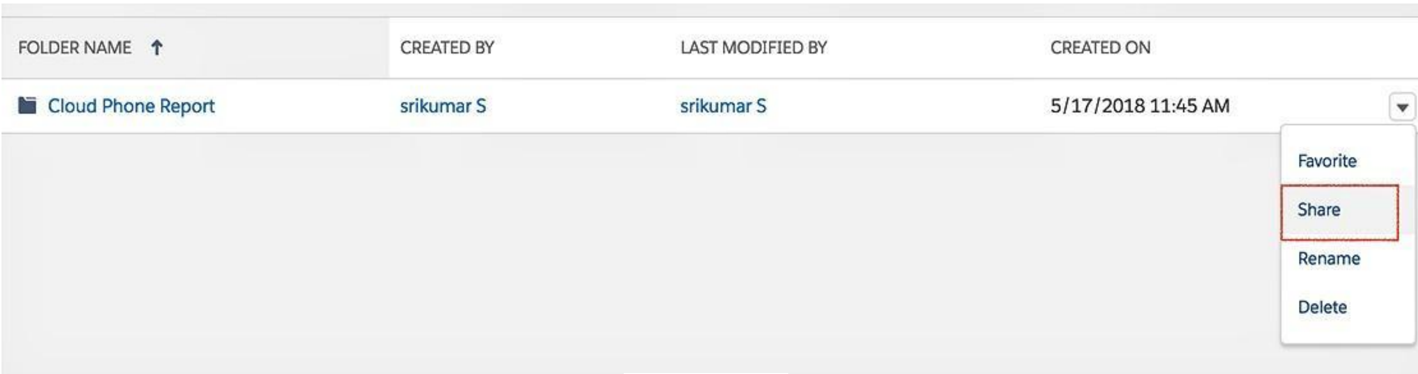


Figure 45

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

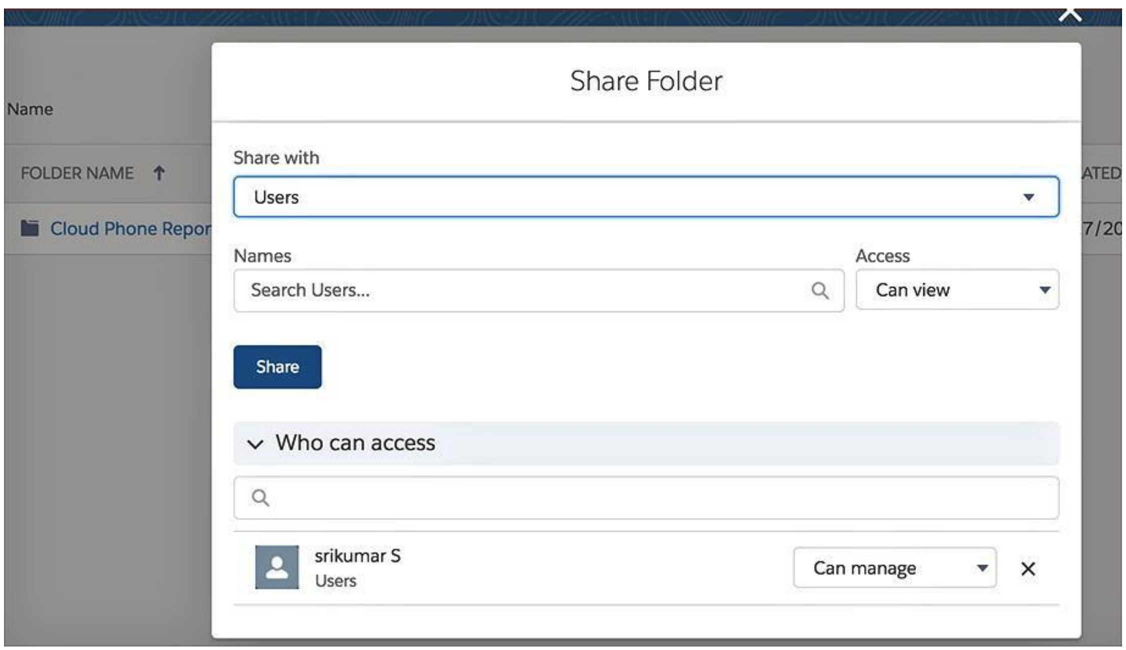


Figure 46

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**.

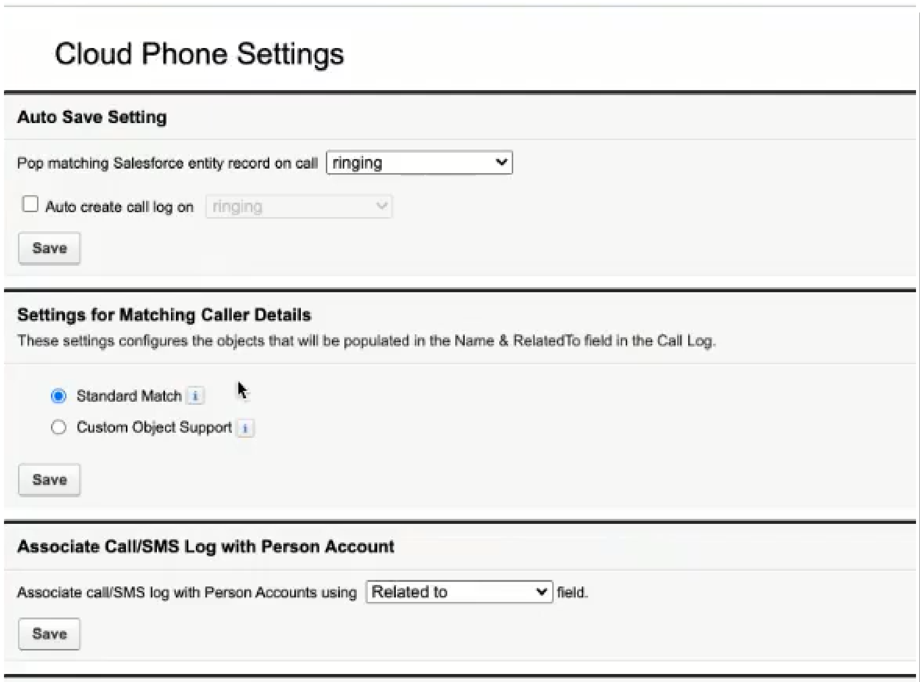


Figure 47

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.

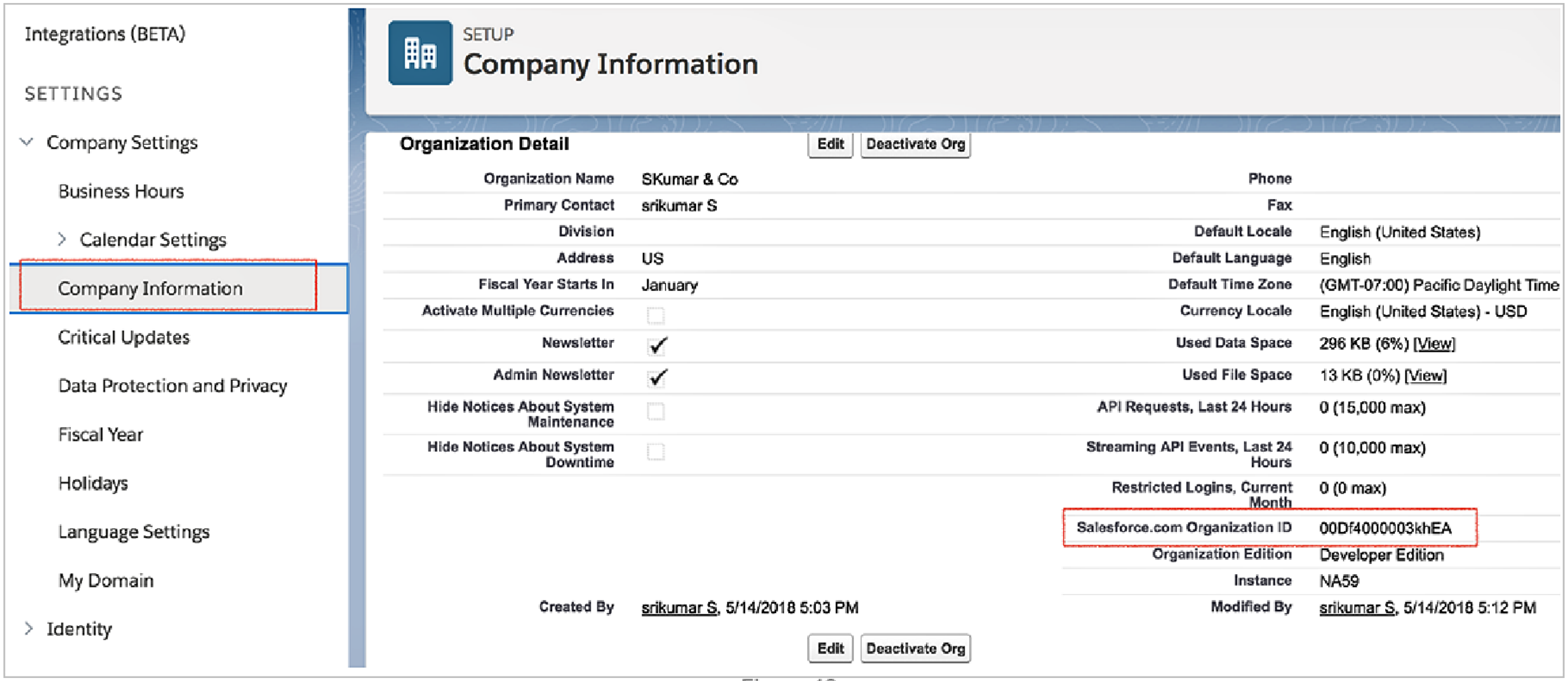

Integrations (BETA)
SETTINGS
Company Settings
Business Hours
Calendar Settings
Company Information
Critical Updates
Data Protection and Privacy
Fiscal Year
Holidays
Language Settings
My Domain
Identity
SETUP
Company Information
Organization Detail
Edit
Deactivate Org
Organization Name
SKumar & Co
Primary Contact
srikumar S
Division
Address
US
Fiscal Year Starts In
January
Activate Multiple Currencies
Newsletter
Admin Newsletter
Hide Notices About System Maintenance
Hide Notices About System Downtime
Phone
Fax
Default Locale
English (United States)
Default Language
English
Default Time Zone
(GMT-07:00) Pacific Daylight Time
Currency Locale
English (United States) - USD
Used Data Space
296 KB (6%) [View]
Used File Space
13 KB (0%) [View]
API Requests, Last 24 Hours
0 (15,000 max)
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
Created By
srikumar S, 5/14/2018 5:03 PM
Modified By
srikumar S, 5/14/2018 5:12 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**.

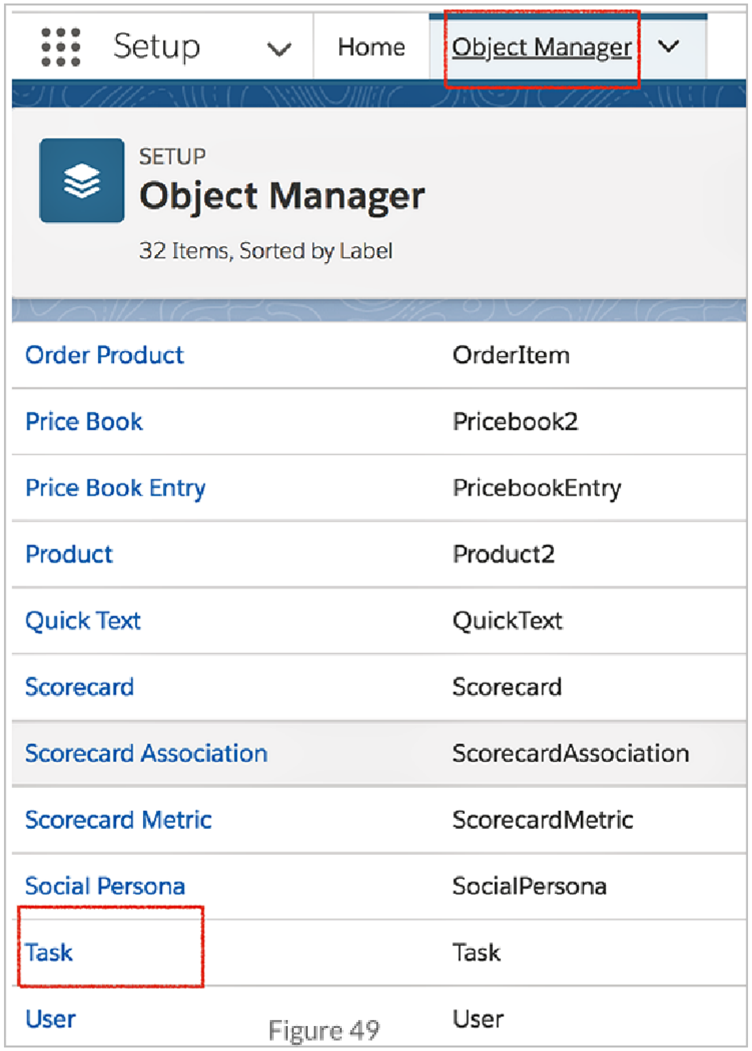


Figure 49

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

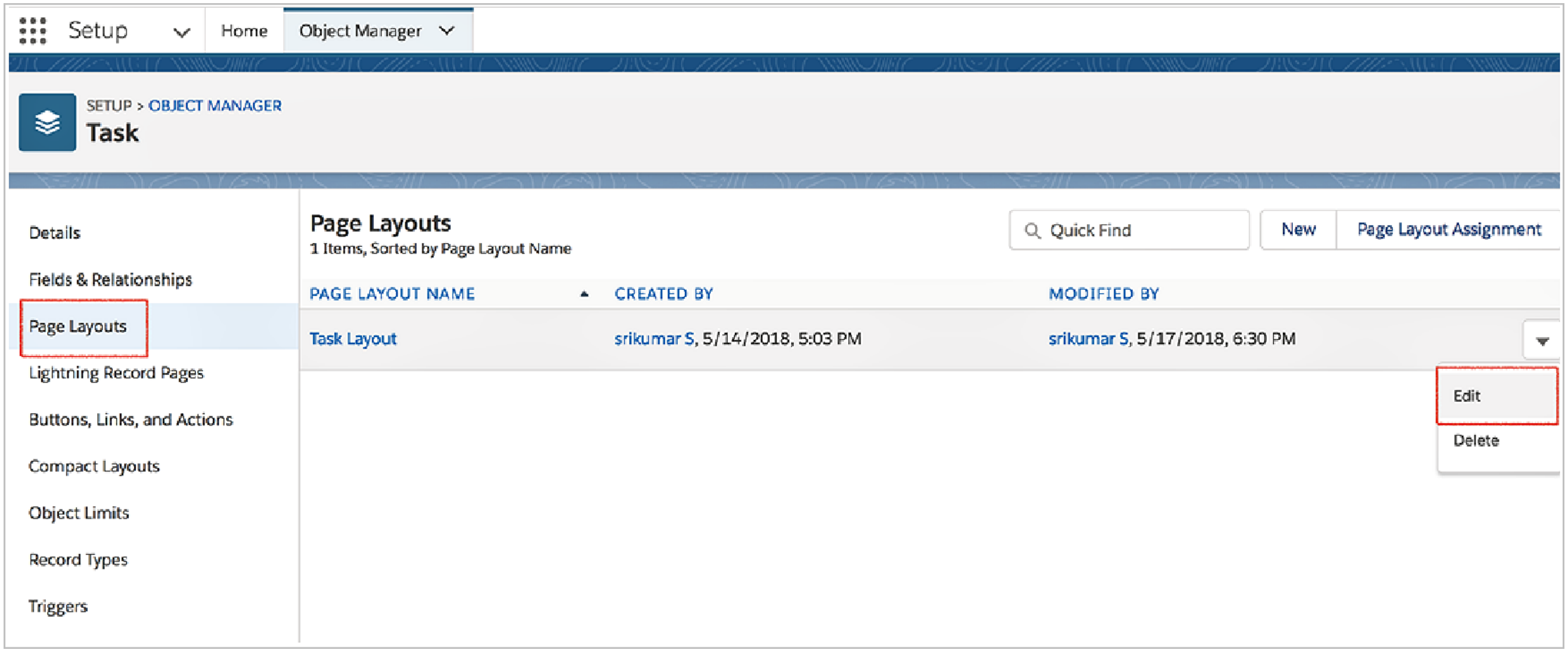


Figure 50

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

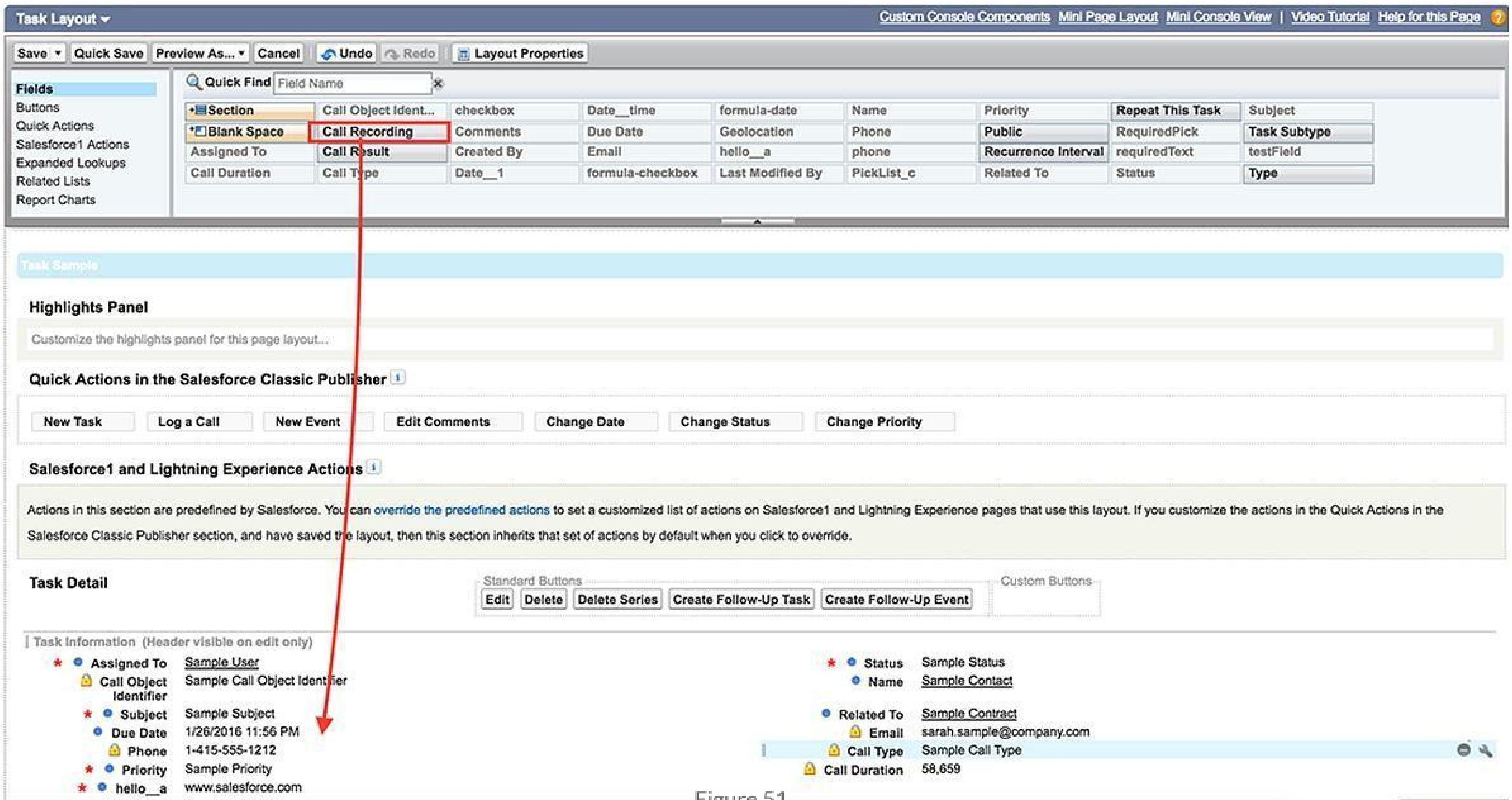


Figure 51

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**.

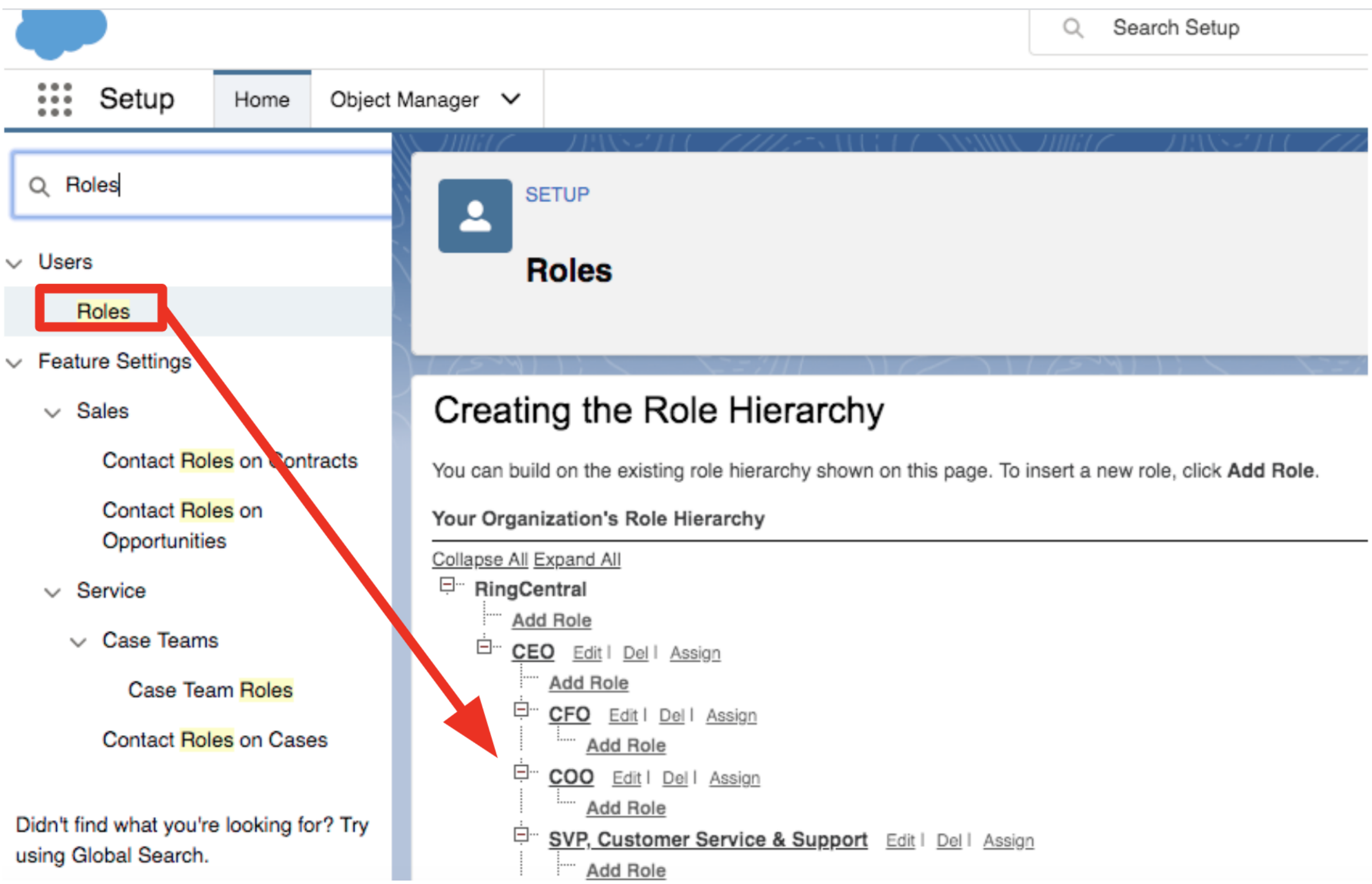


Figure 52

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

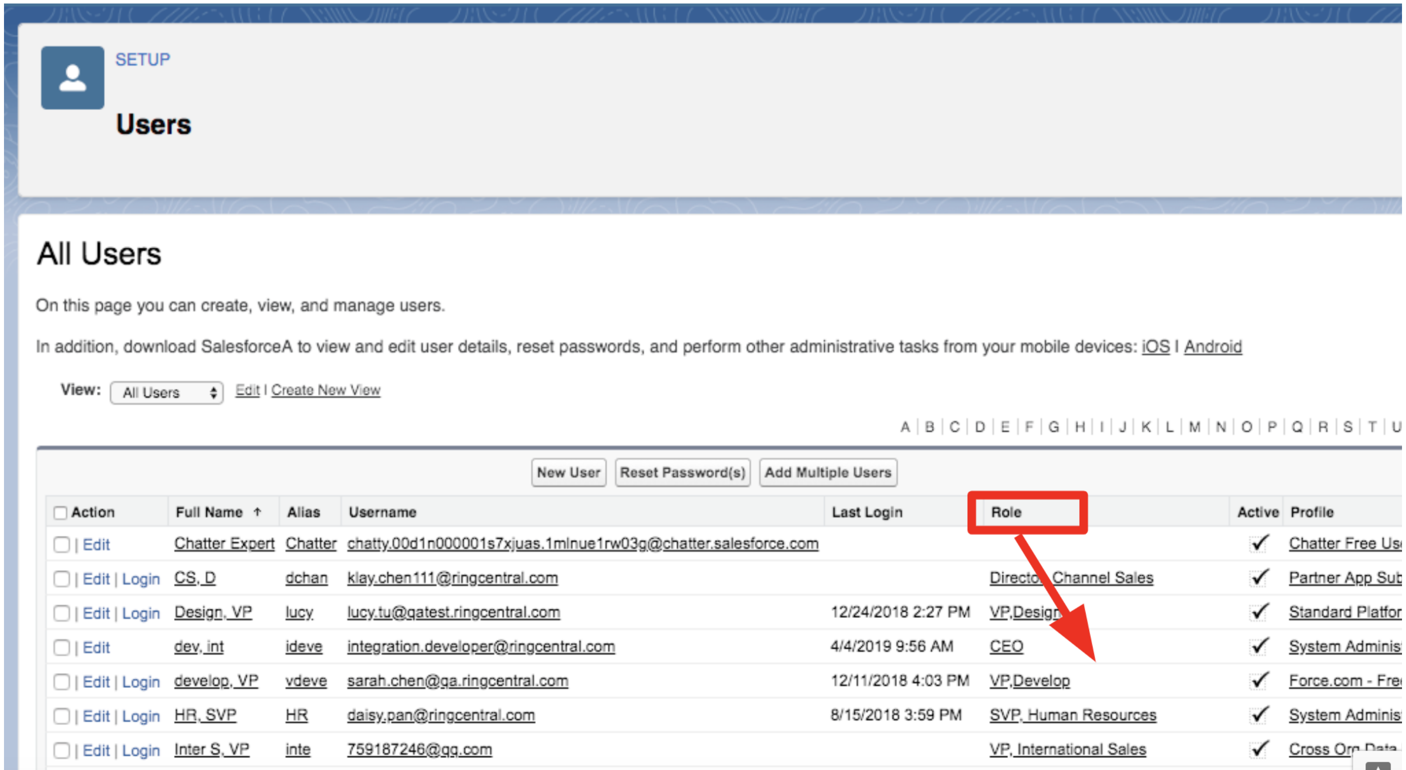


Figure 53

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.

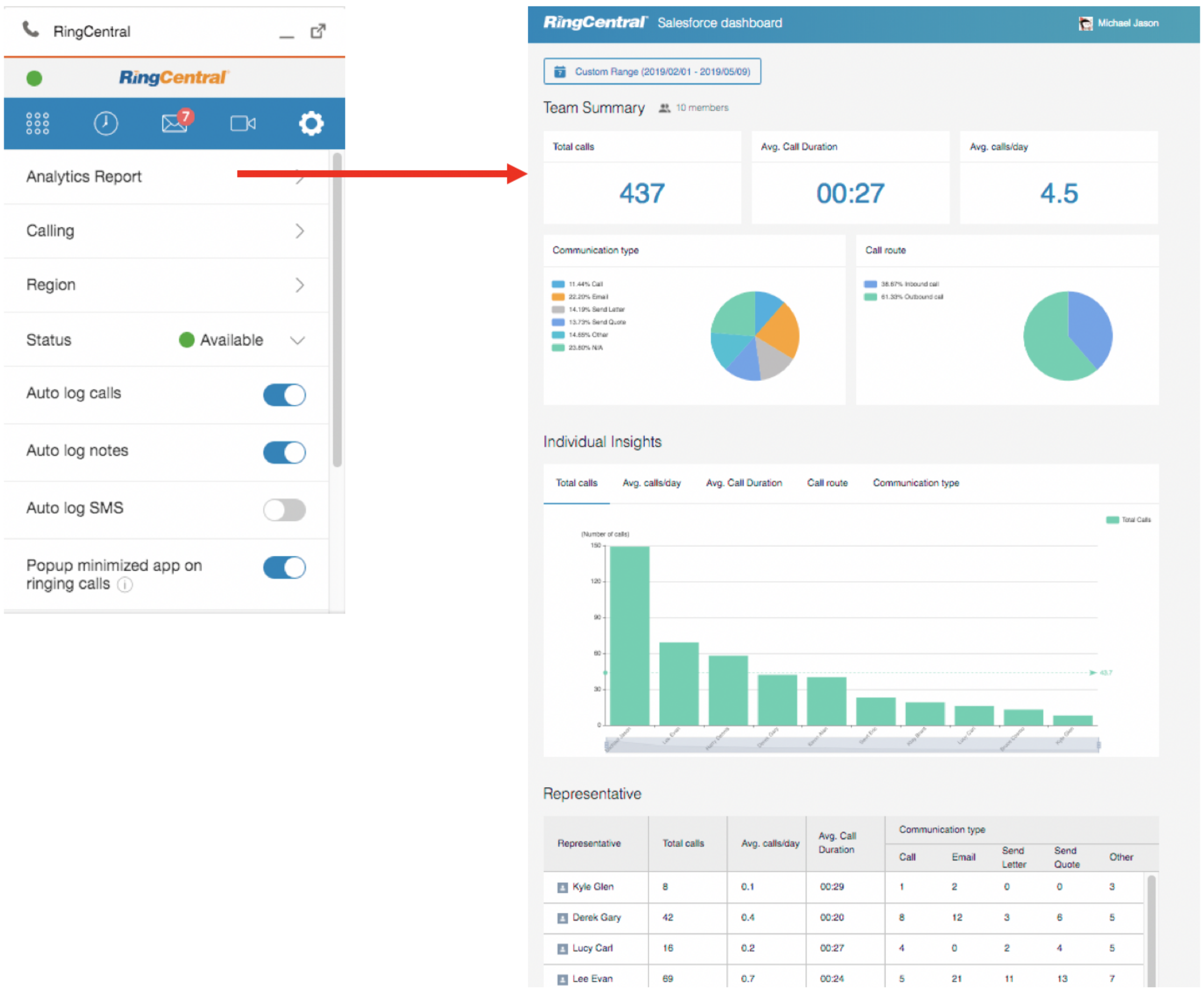


Figure 54

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.

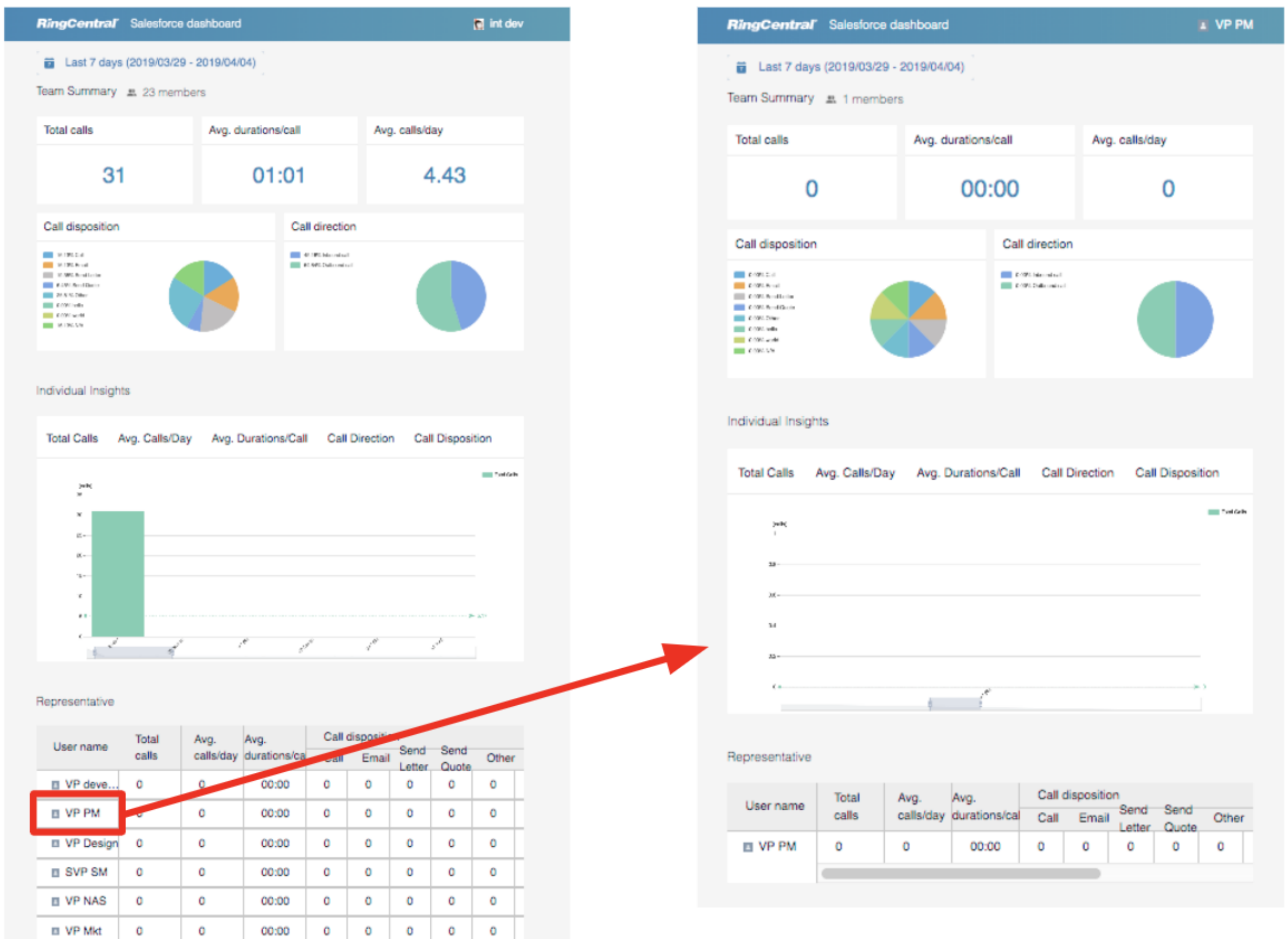


Figure 55

> **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.

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

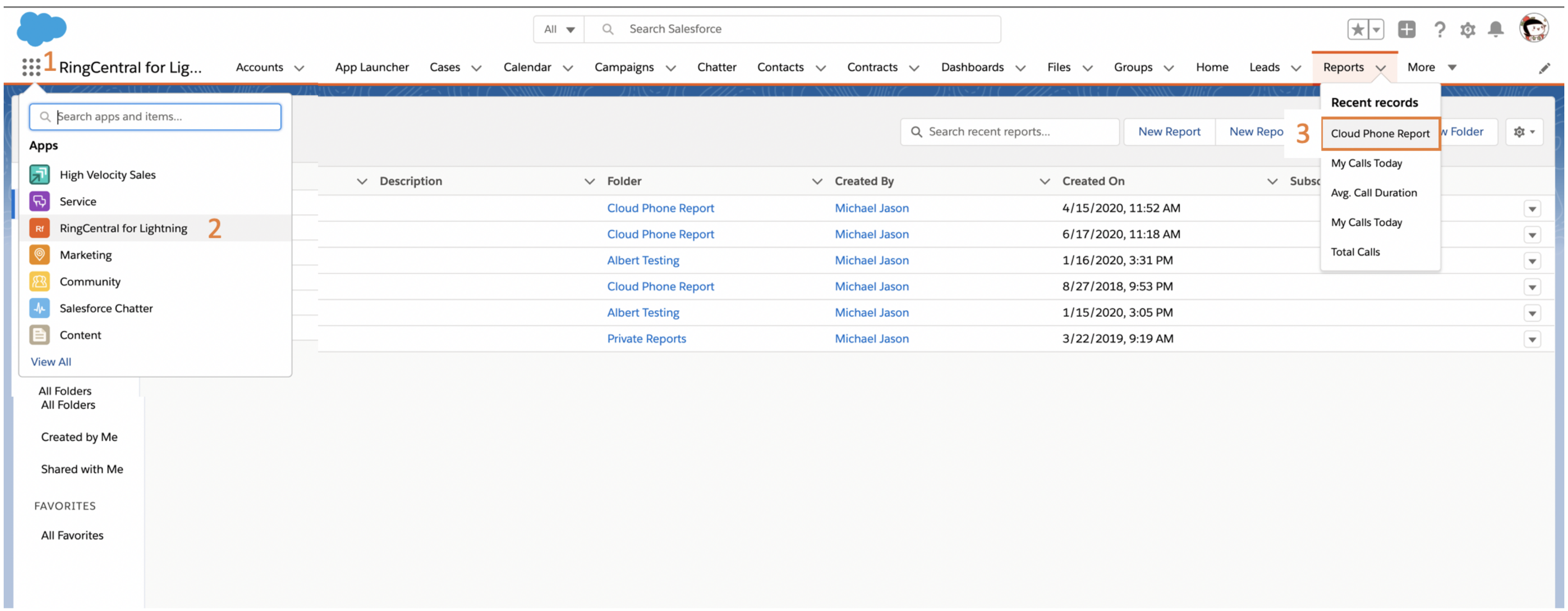
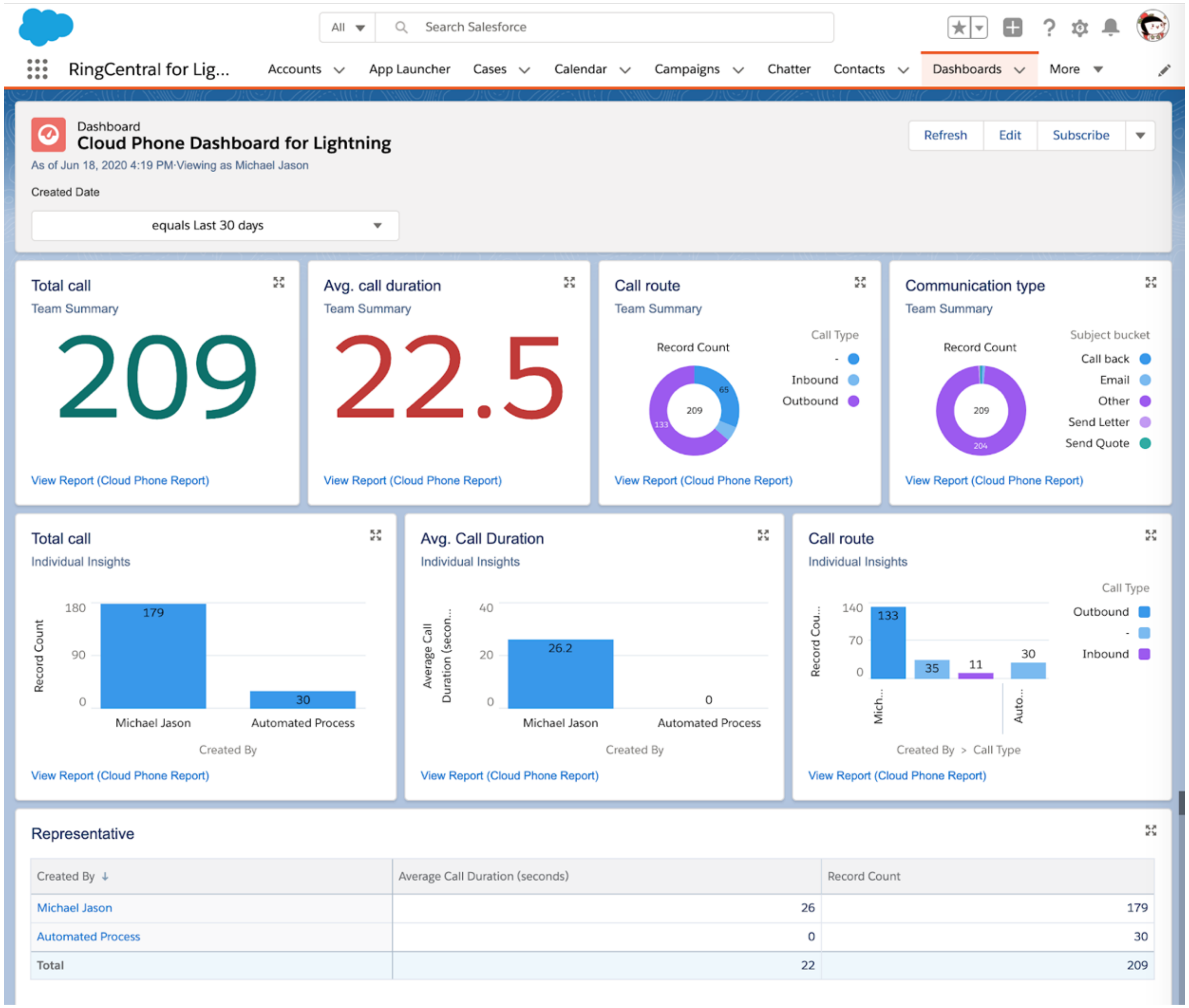


Figure 56



Search Salesforce
RingCentral for Lig...
Accounts
App Launcher
Cases
Calendar
Campaigns
Chatter
Contacts
Dashboards
More
Dashboard
Cloud Phone Dashboard for Lightning
As of Jun 18, 2020 4:19 PM·Viewing as Michael Jason
Refresh
Edit
Subscribe
Created Date
equals Last 30 days
Total call
Team Summary
209
View Report (Cloud Phone Report)
Avg. call duration
Team Summary
22.5
View Report (Cloud Phone Report)
Call route
Team Summary
Record Count
Call Type
Inbound
Outbound
View Report (Cloud Phone Report)
Communication type
Team Summary
Record Count
Subject bucket
Call back
Email
Other
Send Letter
Send Quote
View Report (Cloud Phone Report)
Total call
Individual Insights
Record Count
179
30
Michael Jason
Automated Process
Created By
View Report (Cloud Phone Report)
Avg. Call Duration
Individual Insights
26.2
0
Michael Jason
Automated Process
Created By
View Report (Cloud Phone Report)
Call route
Individual Insights
Call Type
Outbound
Inbound
133
35
11
30
Created By > Call Type
View Report (Cloud Phone Report)
Representative
Created By
Average Call Duration (seconds)
Record Count
Michael Jason
26
179
Automated Process
0
30
Total
22
209

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**.

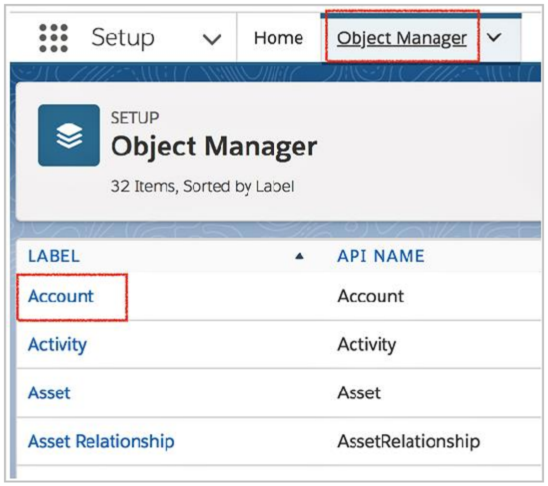


Figure 58

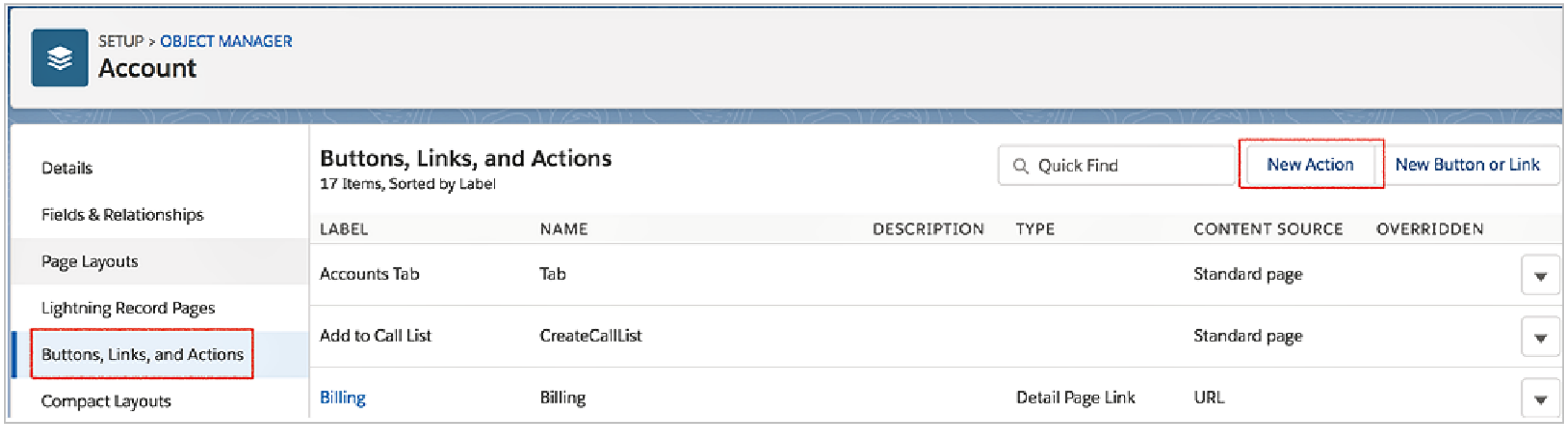

SETUP > OBJECT MANAGER
Account
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Buttons, Links, and Actions
17 Items, Sorted by Label
Quick Find
New Action
New Button or Link
LABEL
NAME
DESCRIPTION
TYPE
CONTENT SOURCE
OVERRIDDEN
Accounts Tab
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**.

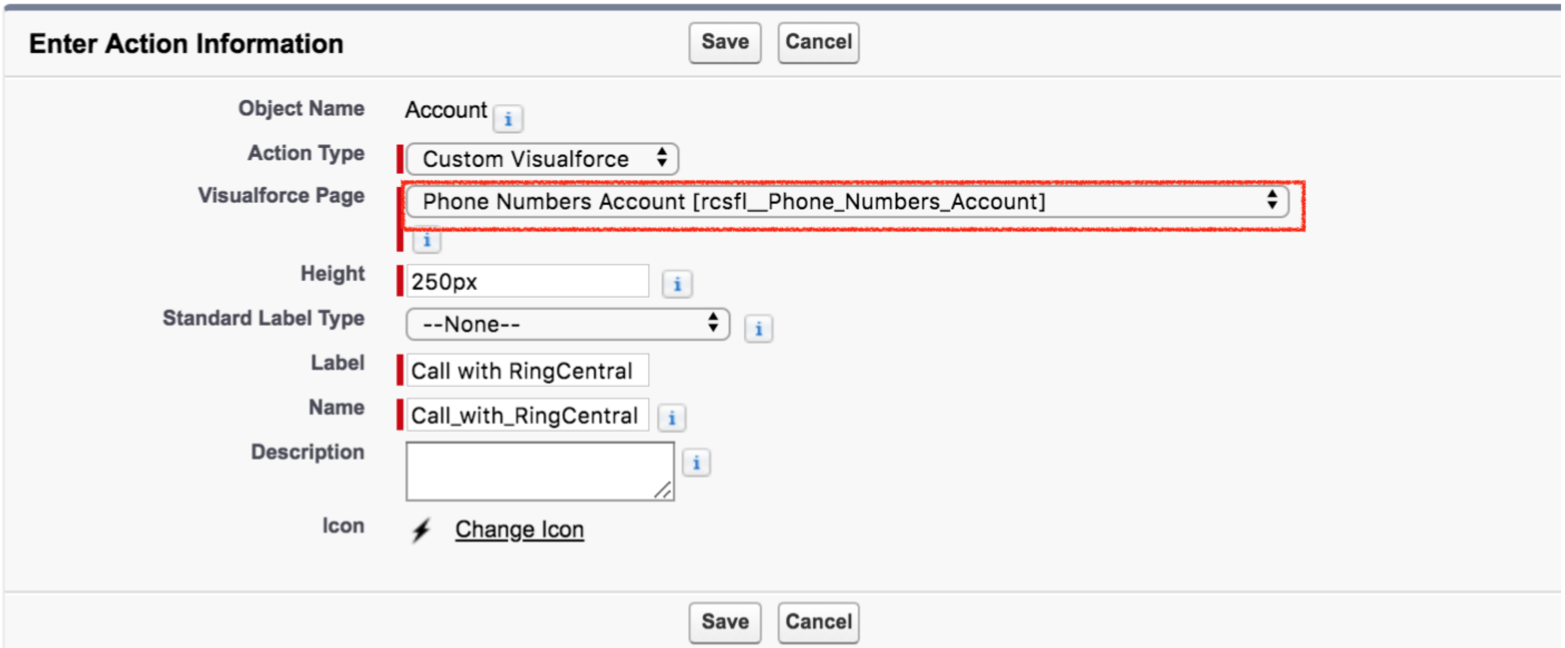


Figure 60

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**.

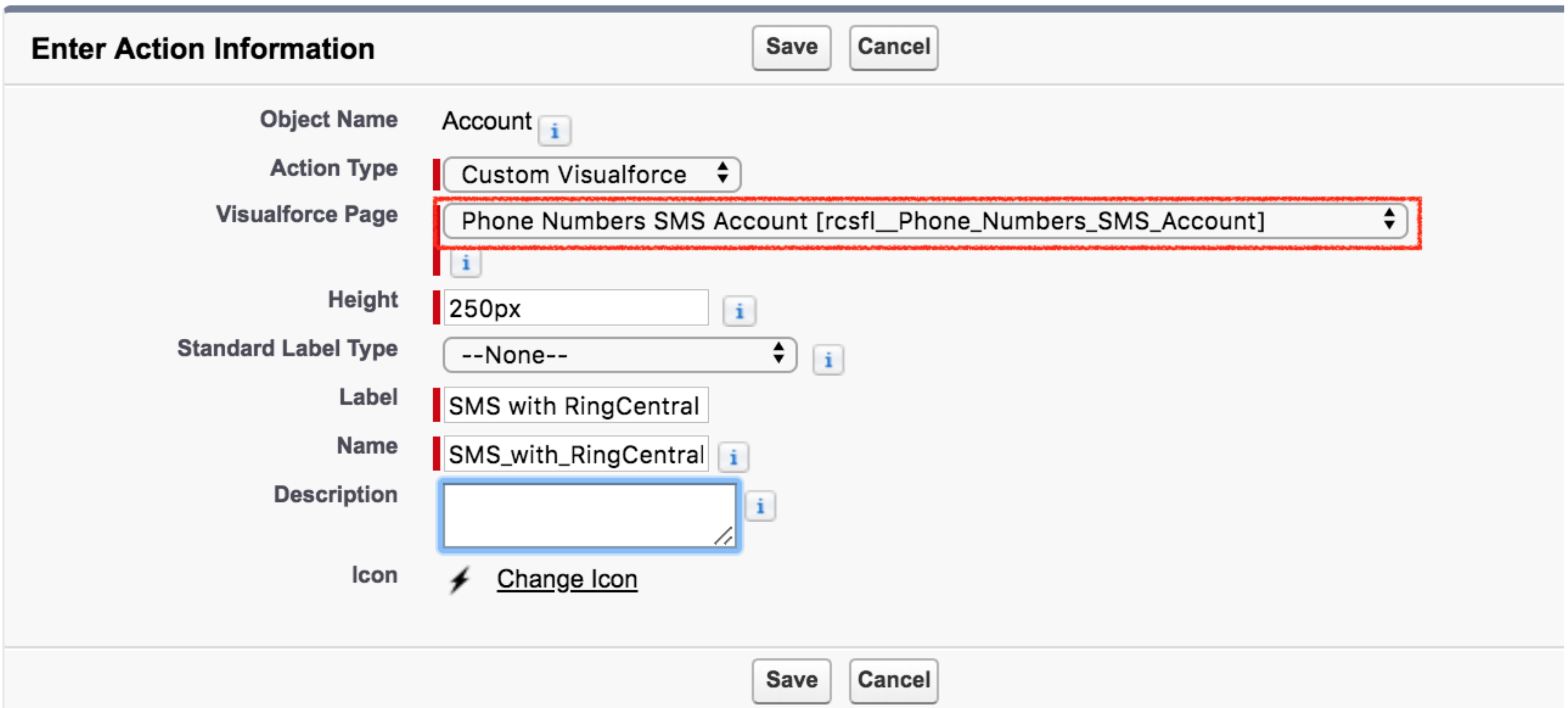


Figure 61

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**.

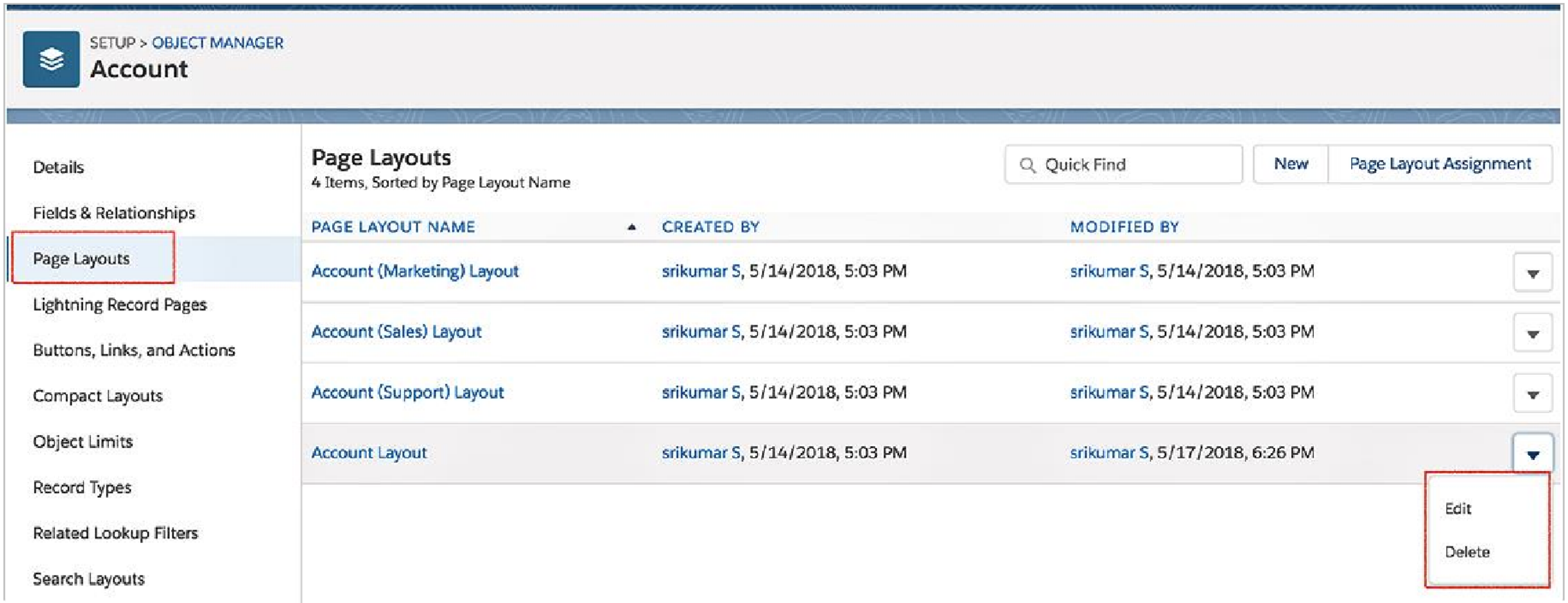


Figure 62

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**.

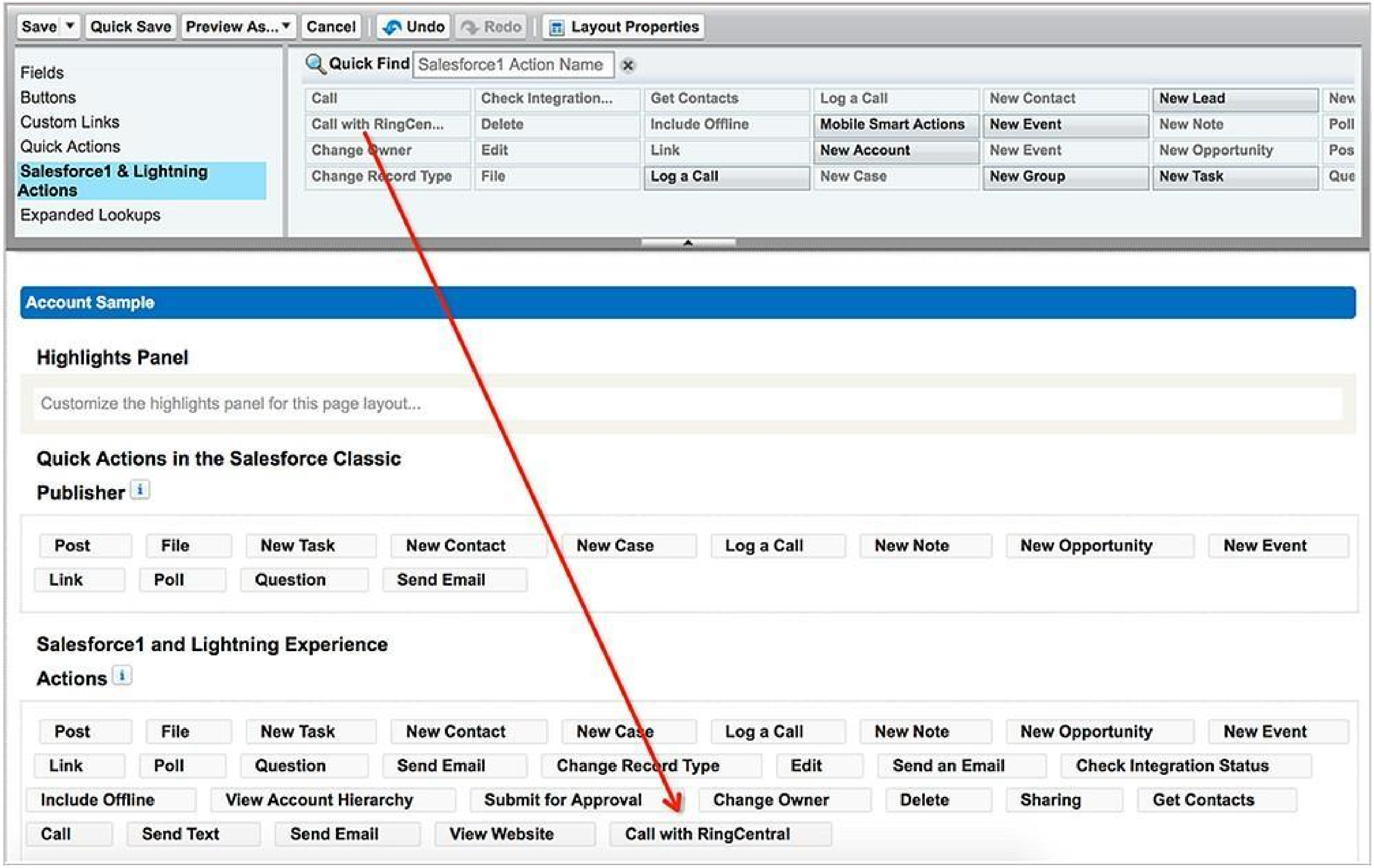


Figure 63

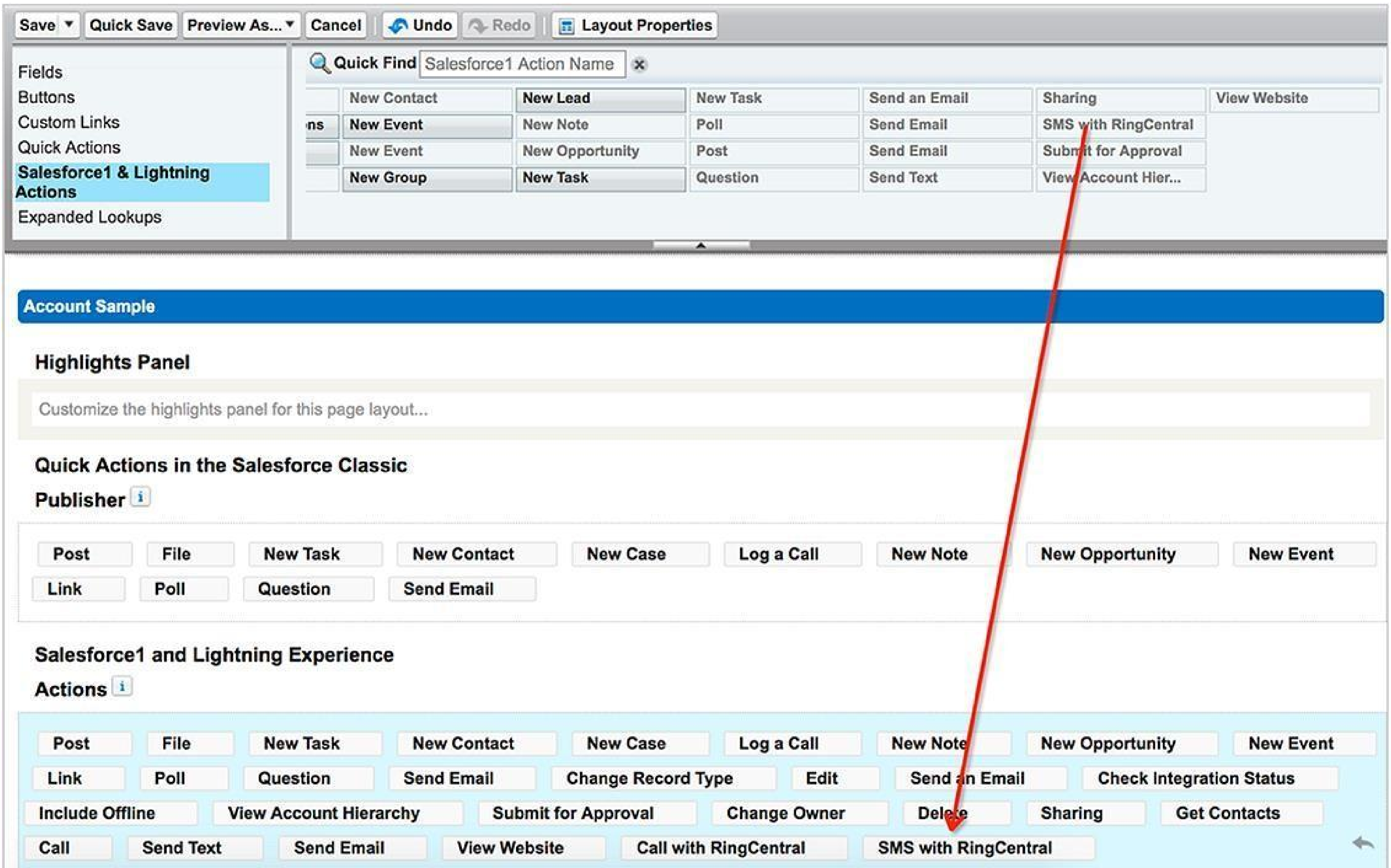

Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Custom Links
Quick Actions
Salesforce1 & Lightning Actions
Expanded Lookups
Quick Find
Salesforce1 Action Name
New Contact
New Lead
New Task
Send an Email
Sharing
View Website
New Event
New Note
Poll
Send Email
SMS with RingCentral
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.

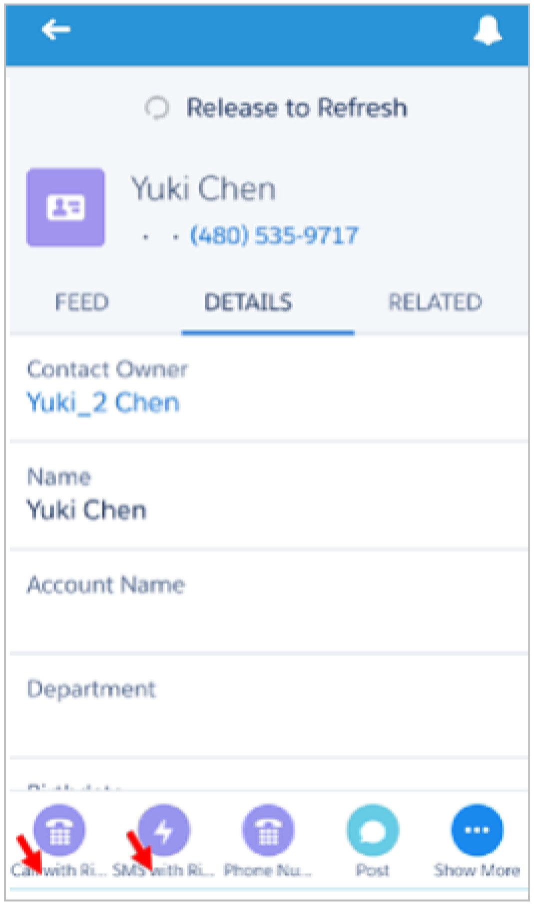


Figure 65

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**.

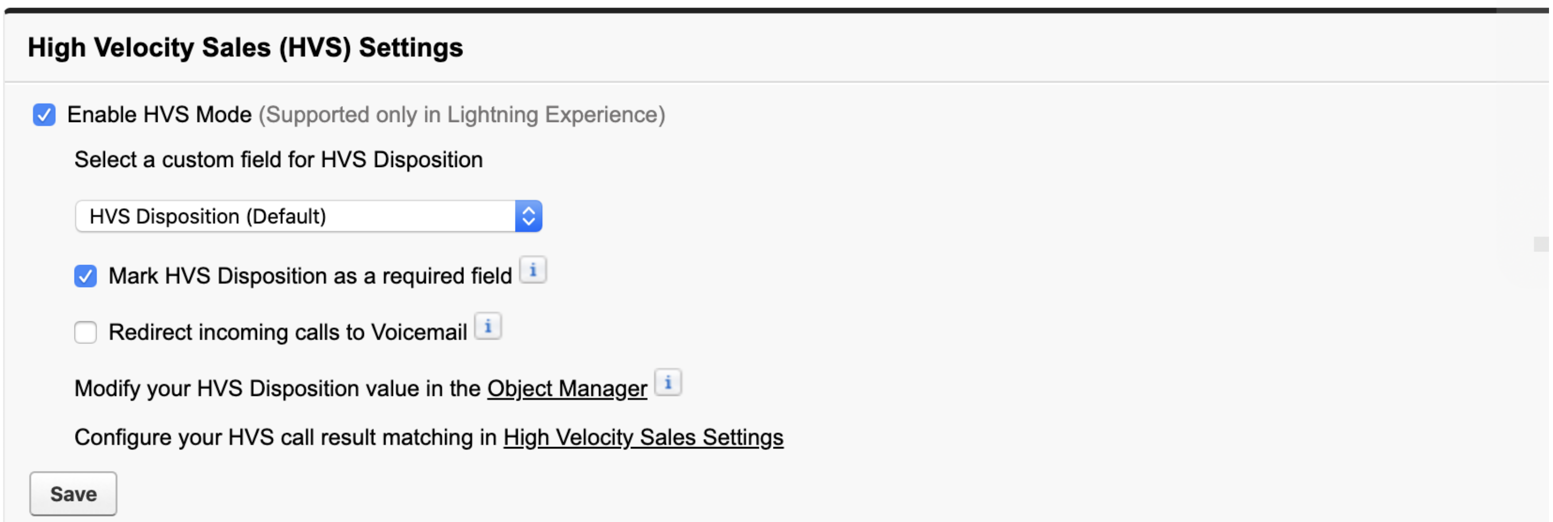


Figure 66

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).

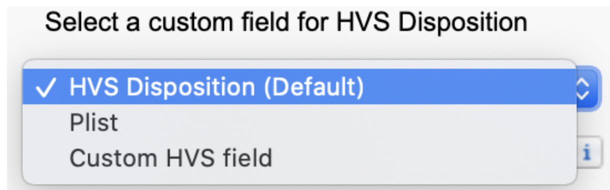


Figure 67

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.

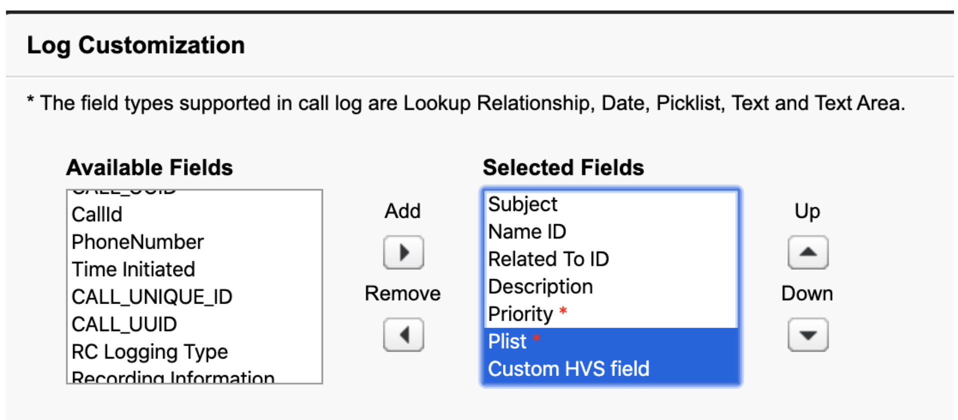


Figure 68

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**.

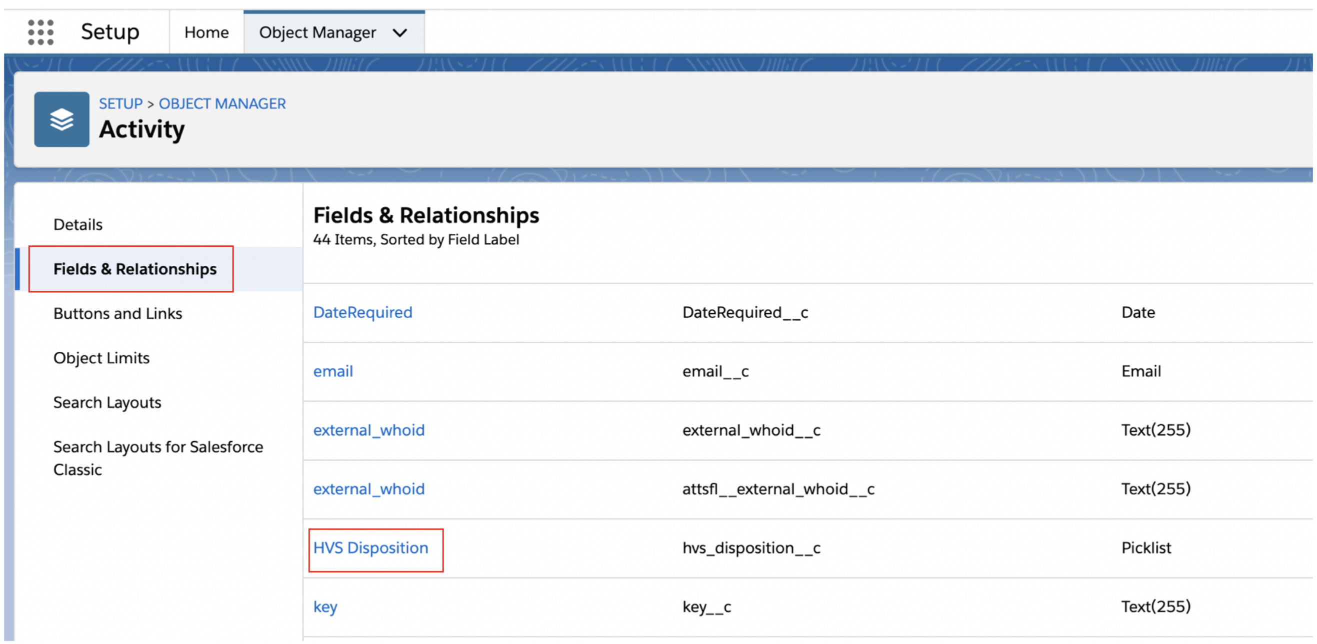


Figure 69

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.

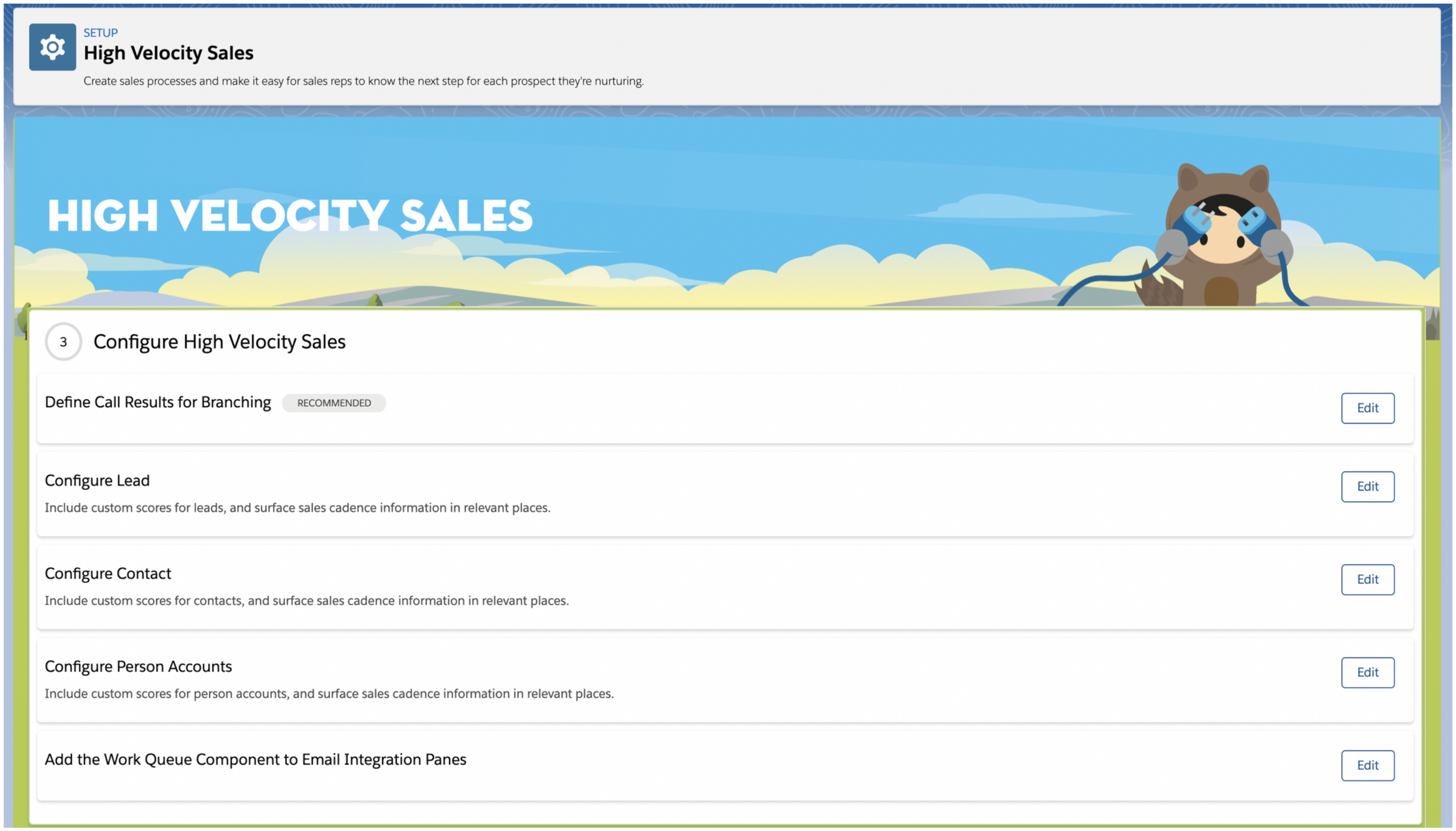


Figure 70

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.

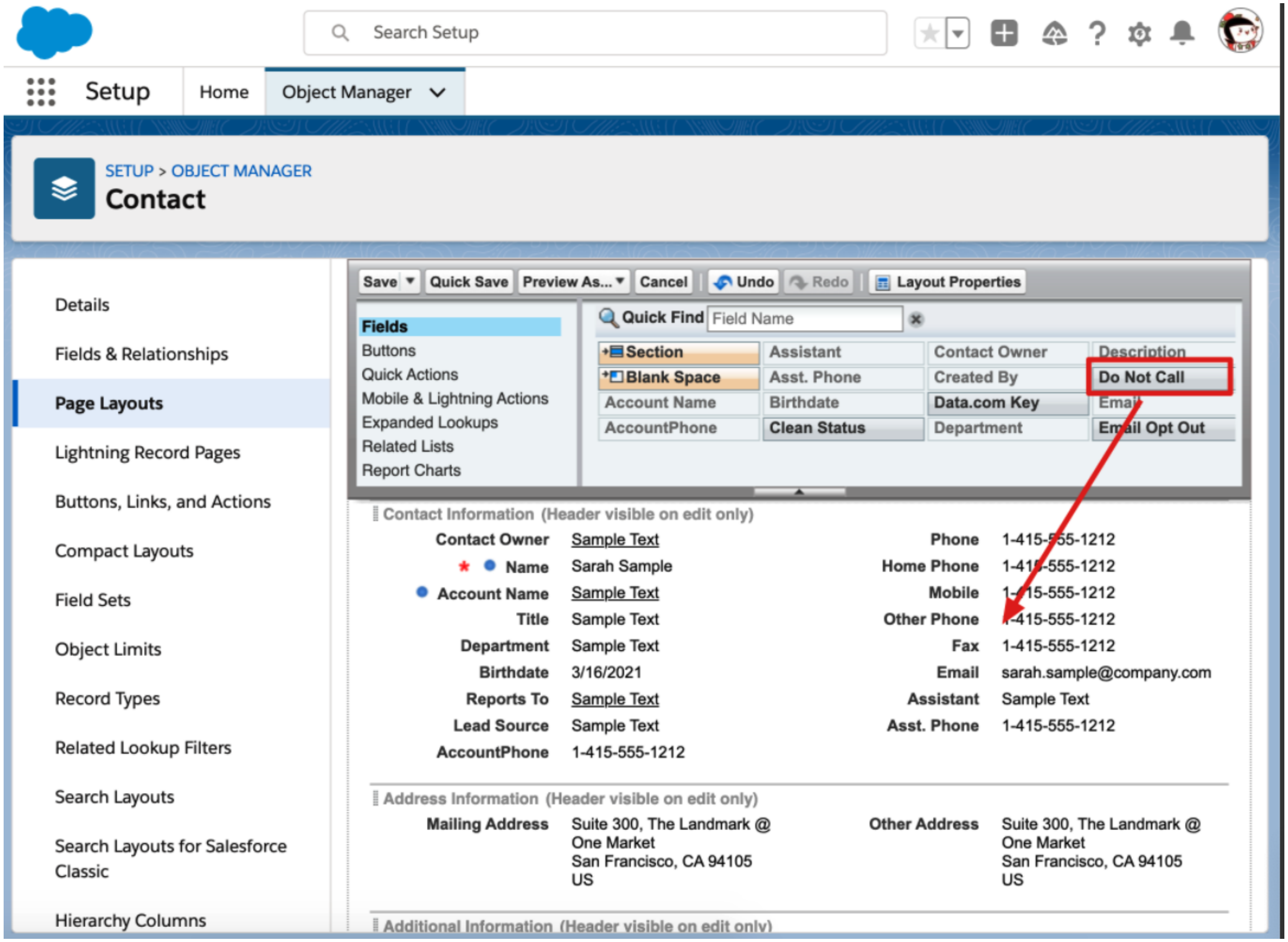
RingCentral for Salesforce Integration can be enabled to honor the Do Not Call (DNC) flag set within Leads and Contacts in Salesforce.

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.

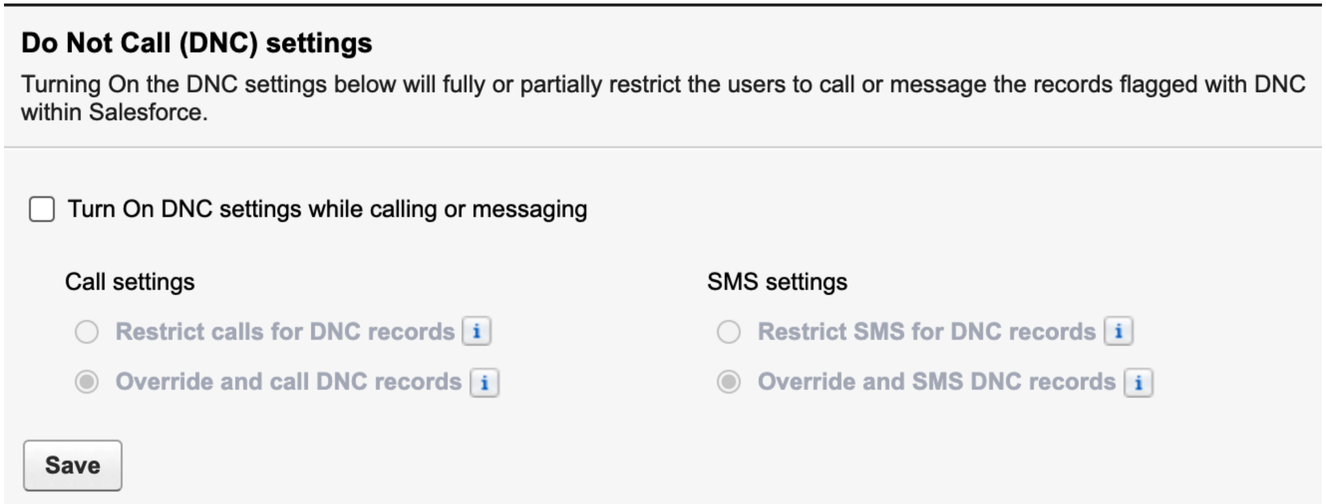
Here are the details of the DNC capability in RingCentral for Salesforce.

Steps

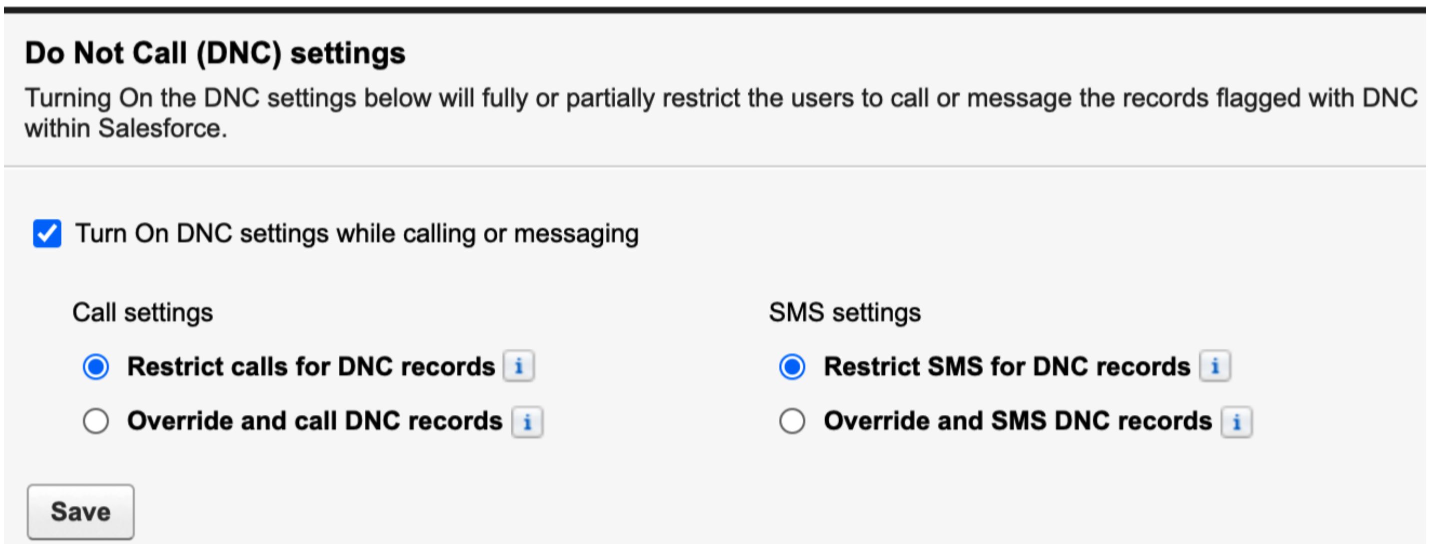
1. Upgrade the RingCentral for Salesforce to latest version (v6.11.0 or later).
2. Make sure the DNC field is available to be set in the Salesforce Org. This can be done by enabling the DNC field in the page layout in Contact and Leads.



3. 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.

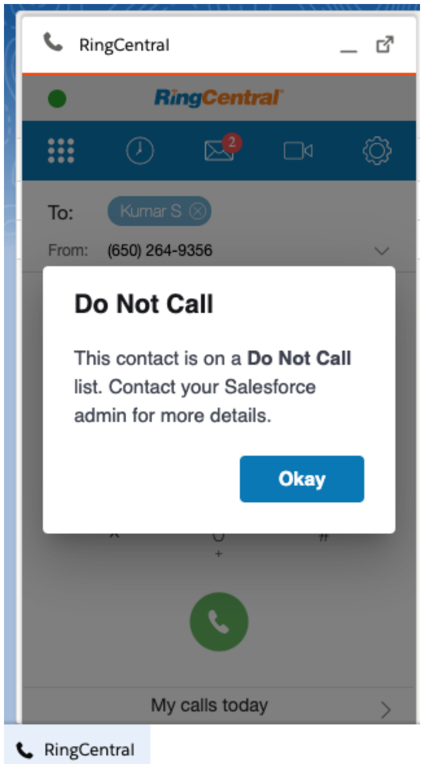


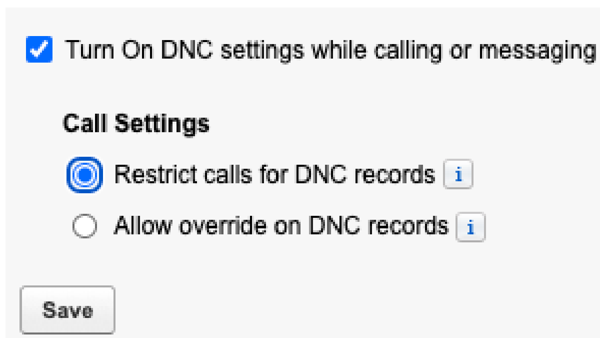
4. To turn ON the feature, check **Turn On DNC settings while calling or messaging**, then select the Call and SMS Settings.



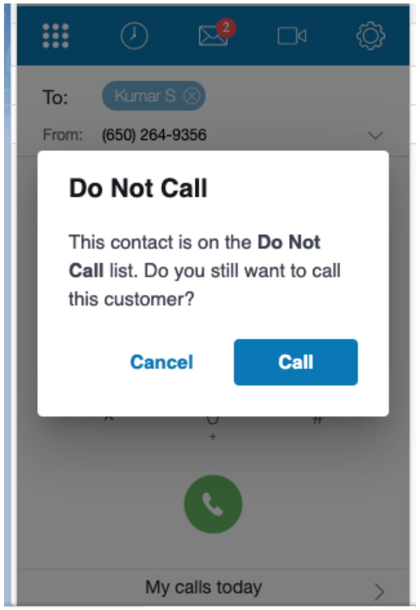
5. The DNC call settings

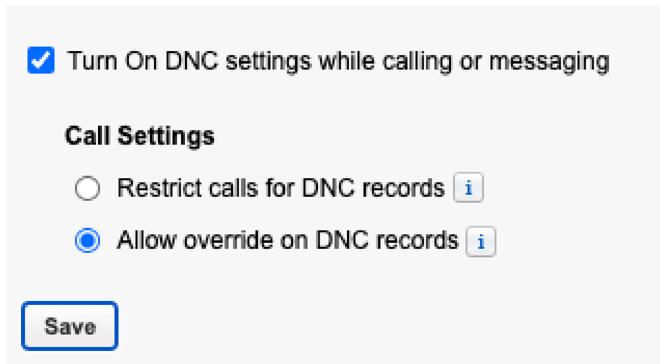
   a. **Restrict calls for DNC records**: In this mode, end users will not be able to make calls to DNC records with RingCentral for Salesforce. A notification will pop up when the end user initiates a call stating they cannot place the call as the record is on DNC.



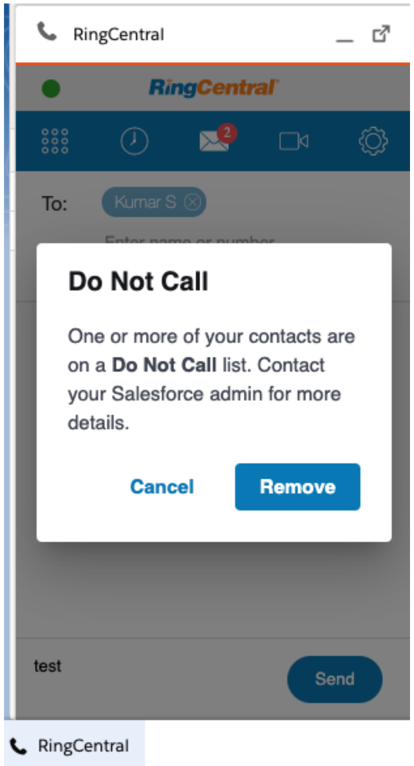


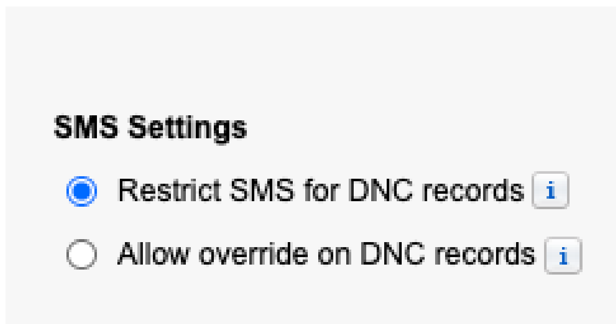
   b. **Override and call DNC records**: In this mode, when the end user tries to make calls to DNC records with RingCentral for Salesforce, they will be notified that this is a DNC record, but will still be given the capability to override and make calls.



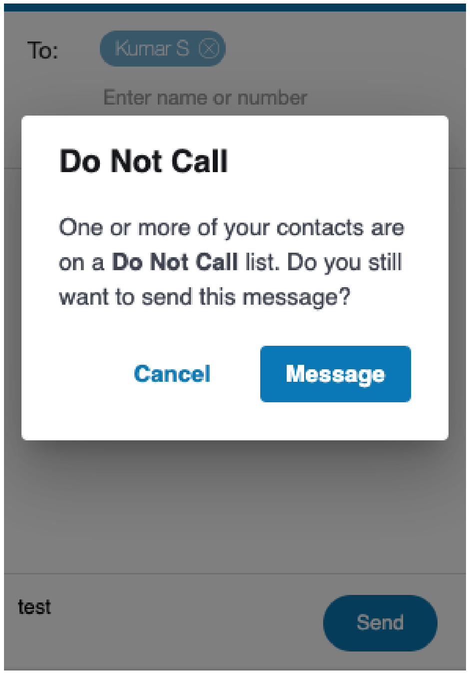


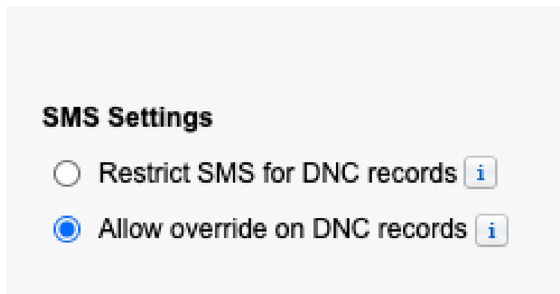
6. The DNC SMS settings
    a. **Restrict SMS for DNC records:** In this mode, end users will not be able to SMS DNC records with RingCentral for Salesforce. A notification will pop up and alert the user.





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:

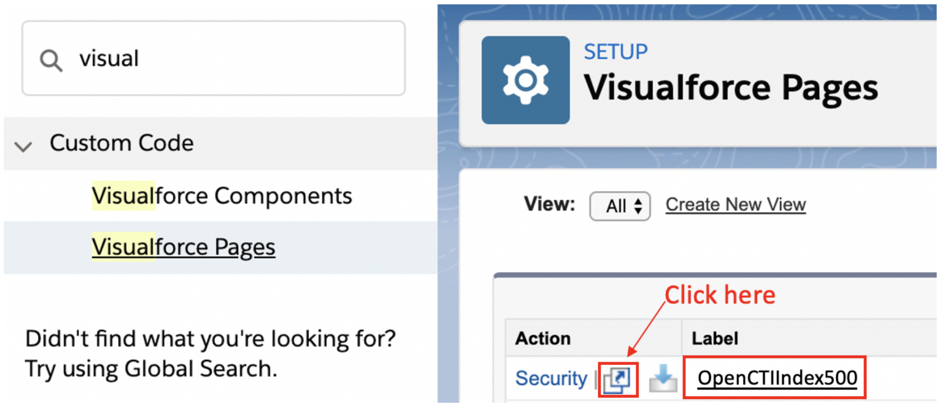
/apex/OpenCTIIndex

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**.

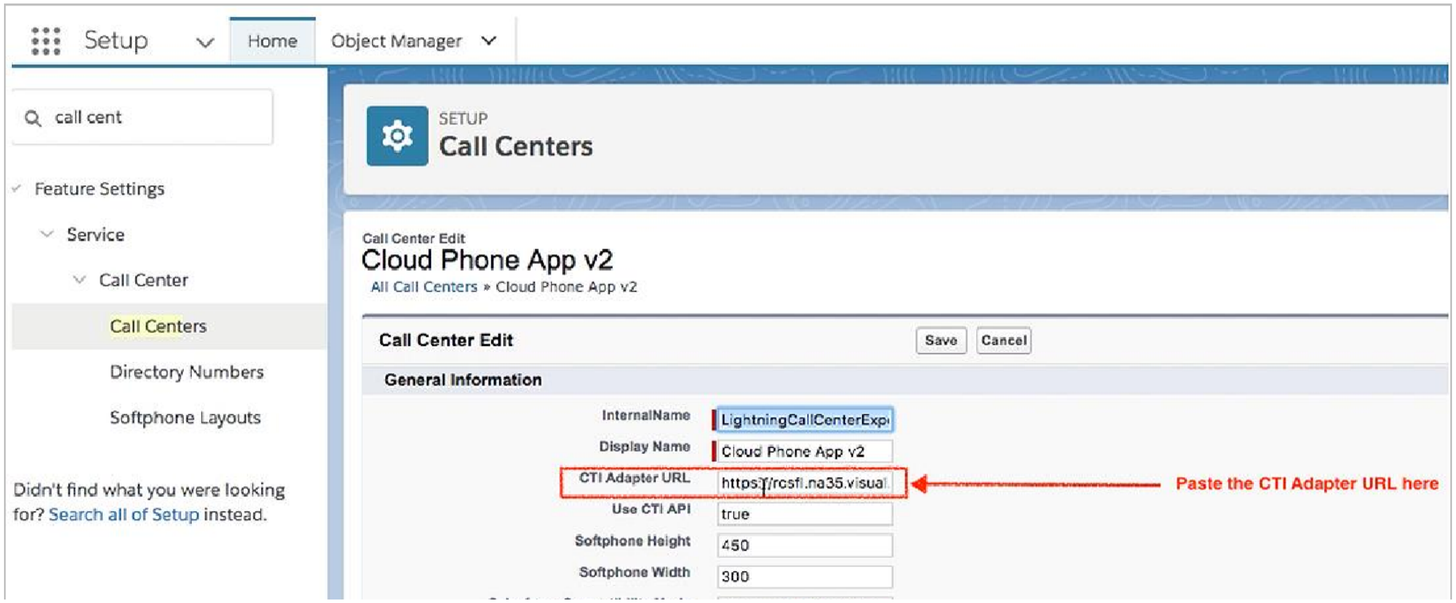


2. After the page opens in a new tab or window, copy its URL.

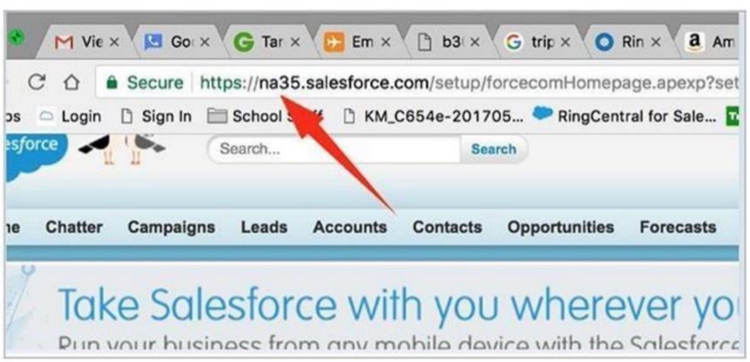
   For example, the full URL is: https://c.na78.visual.force.com/apex/OpenCTIIndex500#/login
   copy the following part of the URL: https://c.na78.visual.force.com/apex/OpenCTIIndex500

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**.



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.

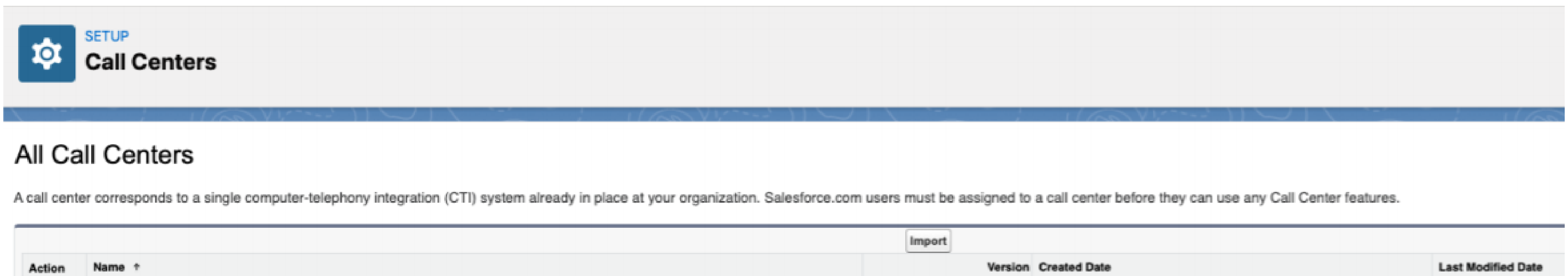
A: If the RingCentral for Salesforce App is installed for the first time, then the RingCentral Admin App also known as the install wizard should provide the option to create the Call Center. If this button to create the call center is disabled or you cannot create see the call center after an upgrade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