



RingCentral for Salesforce

Admin guide
v6.29.0

RingCentral for Salesforce

Admin Guide





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Introduction

About RingCentral for Salesforce

The 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

RingCentral Subscription:

- MVP Premium and above

Hardware Requirements ([for the best Salesforce experience](#)):

- An Octane 2.0 score of 30,000 or greater
- Network latency of 150 ms or less
- Download speed of 3 Mbps or greater
- At least 8 GB of RAM, with 3 GB available for Salesforce browser tabs

Recommended Operation System and Software Requirements:

- The latest Windows or Mac OS, 32 or 64-bit
- Current (-1) version of Chrome, Firefox, Edge (Chromium) or Safari
- The latest RingCentral application (optional)
- The latest RingCentral Phone application (optional)

Minimum Operation System and Software Requirements:

- Windows XP SP2
- Mac OS X 10.8
- Chrome 56, Firefox 52, Safari 6.0.5

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 how to use the application or any 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 created for RingCentral for Salesforce Lightning version 6.18.x. All previous and related guides for RingCentral for Salesforce can be accessed from the [Salesforce AppExchange](#).

Installation

Install RingCentral for Salesforce

Install the RingCentral for Salesforce package from the Salesforce [AppExchange](#). 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 | HVS

By RingCentral, Inc.

What is RingCentral for Salesforce? 复制链接

Get It Now

Starting at \$19.99 USD per user per month

Discounts available for nonprofits

Watch Demo

RATING
★★★★☆ (50)

CATEGORIES
Telephony, Collaboration

LATEST RELEASE
12/15/2021

INDUSTRY
Education, Retail

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!


1 of 12 - RingCentral for Salesforce demo video

By clicking “Get It Now”, the confirm page will appear. Click the “Visit Provider

Install from RingCentral, Inc.'s Website

You can install this package from the provider's website.

 This app does not list support for your edition of Salesforce. You can continue installation, but it may fail later in the process.

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

Here are the details we'll share from your profile [Edit Profile](#)

* First Name	RingCentral	* Company	RingCentral
* Last Name	Demo	* Country	United States
Job Title	Developer	* State/Province	California
* Email	wenlveqin+ringcentraldemo@gmail.com		
Phone			

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

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

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

Allow the provider to contact me by email, phone, or SMS about other products or services I might like

The user will be navigated to the landing page. Select a Production or a Sandbox environment to process the installation.


In this guide, we are going to install the application in a Production environment.


RingCentral Sales: (844) 836 1536

WELCOME TO


RingCentral for Salesforce®

Integrated cloud business communications that improve your CRM experience.



 **New to RingCentral?**

[Get a free trial](#) Credit card is not needed.

 **Already a RingCentral customer?**


[Production](#)

The Production is a live environment where any changes made will affect the Organization.

[Sandbox](#)

The Sandbox is a risk-free testing environment that allows you to simulate any configuration changes that will not affect as a "live" in your production org.

The installation process will be initiated in the Salesforce environment. Select the users that wanted to be installed. And click the Install button.



Install rc_sf_package

By RingCentral

Install for Admins Only


Install for All Users

Install for Specific Profiles...

App Name	Publisher	Version Name	Version Number
rc_sf_package	RingCentral	6.17.1	6.17.1


[Additional Details](#) [View Components](#)

The installation will continue to process. If the installation takes longer than expected, Salesforce will send an email notification when done.



Install rc_sf_package


By RingCentral

 **Installing and granting access to all Users...**

App Name	Publisher	Version Name	Version Number
rc_sf_package	RingCentral	6.17.1	6.17.1


[Additional Details](#) [View Components](#)

Once the installation is done, the completed page will be displayed.



Install rc_sf_package

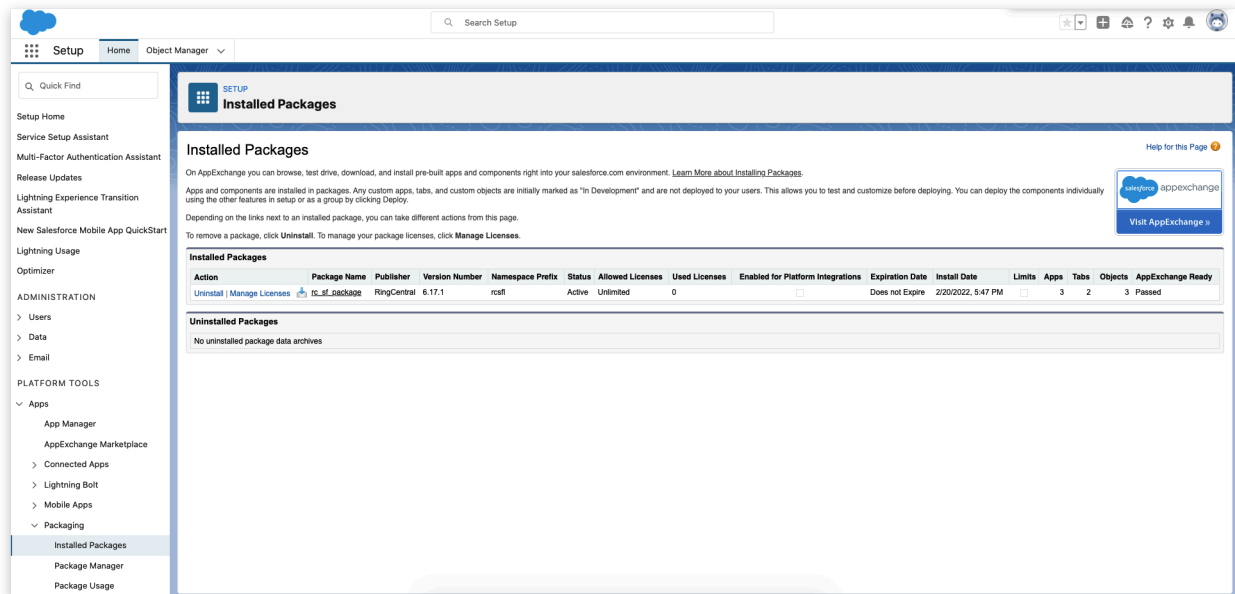
By RingCentral

**Installation Complete!**

[Done](#)

App Name	Publisher	Version Name	Version Number
rc_sf_package	RingCentral	6.17.1	6.17.1

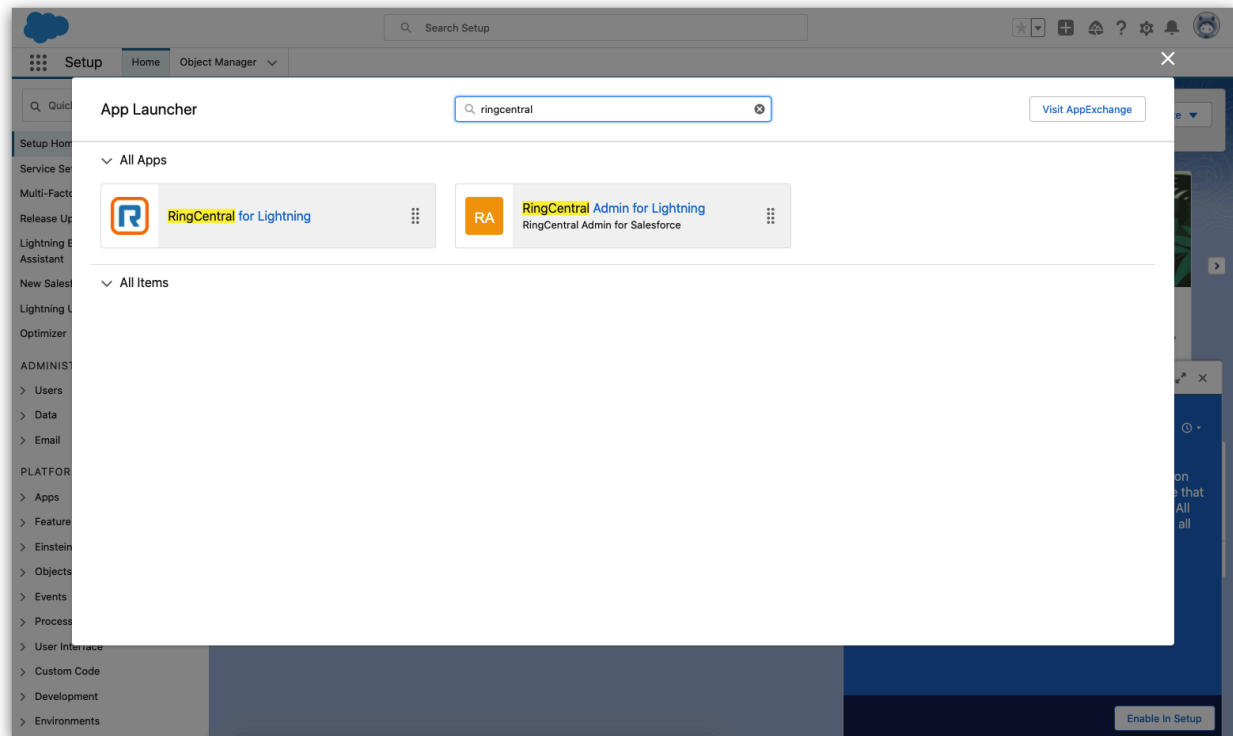
Now the admin can find the installed package in the Salesforce Setup → Apps → Packaging → Installed Packages.



The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation options like 'Setup Home', 'Service Setup Assistant', and 'Packaging'. The main content area is titled 'Installed Packages' and includes a table with columns for Package Name, Publisher, Version Number, Namespace Prefix, Status, Allowed Licenses, Used Licenses, Enabled for Platform Integrations, Expiration Date, Install Date, Limits, Apps, Tabs, Objects, and AppExchange Ready. The table lists one installed package: 'rc_sf_package' by RingCentral, version 6.17.1, with a namespace prefix of 'rcsf', status 'Active', and 'AppExchange Ready' status 'Passed'.

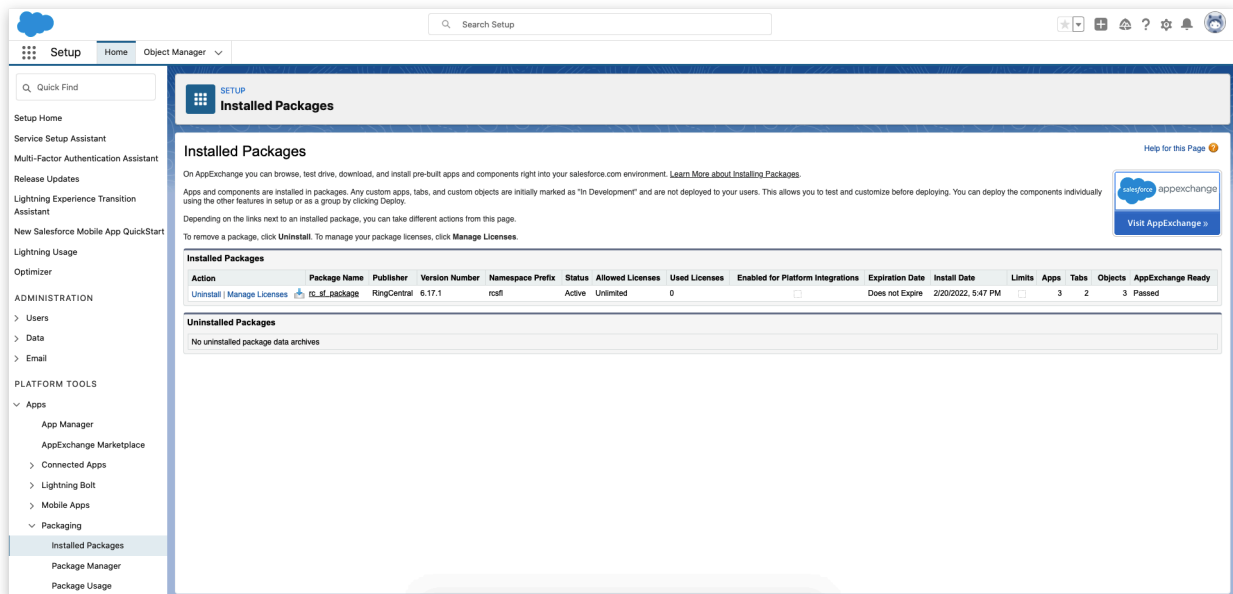
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall Manage Licenses	rc_sf_package	RingCentral	6.17.1	rcsf	Active	Unlimited	0	<input type="checkbox"/>	Does not Expire	2/20/2022, 5:47 PM	<input type="checkbox"/>	3	2	3	Passed

Once the installation is completed, the admin user is able to find the RingCentral for Lightning and RingCentral Admin for Lightning from the App Launcher.

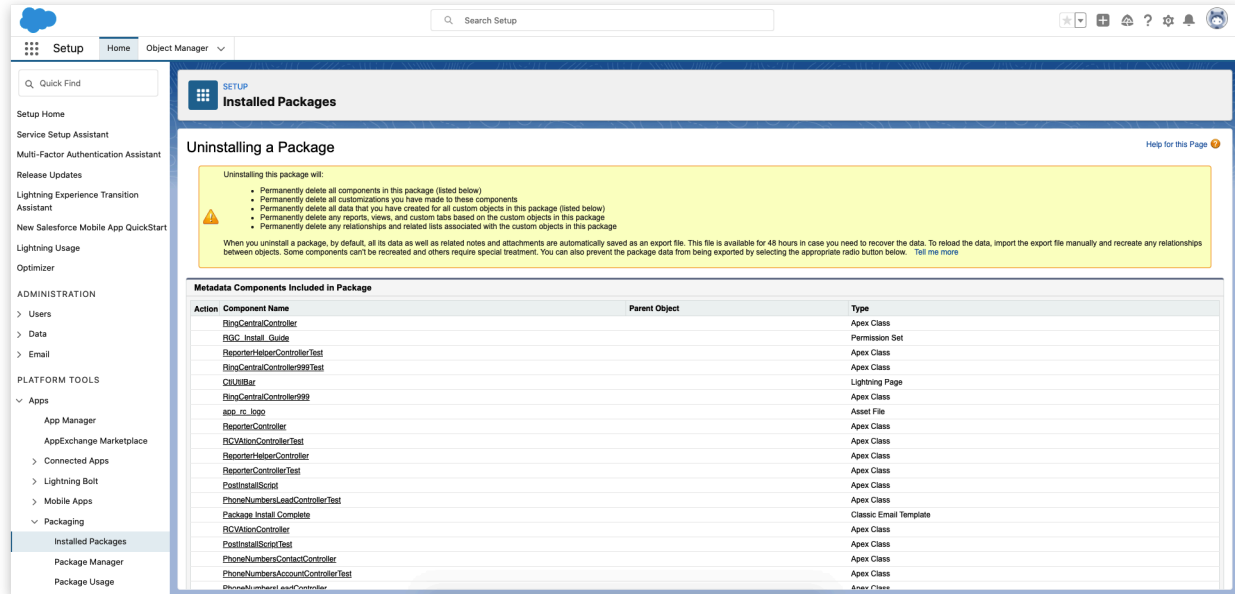


Uninstall RingCentral for Salesforce

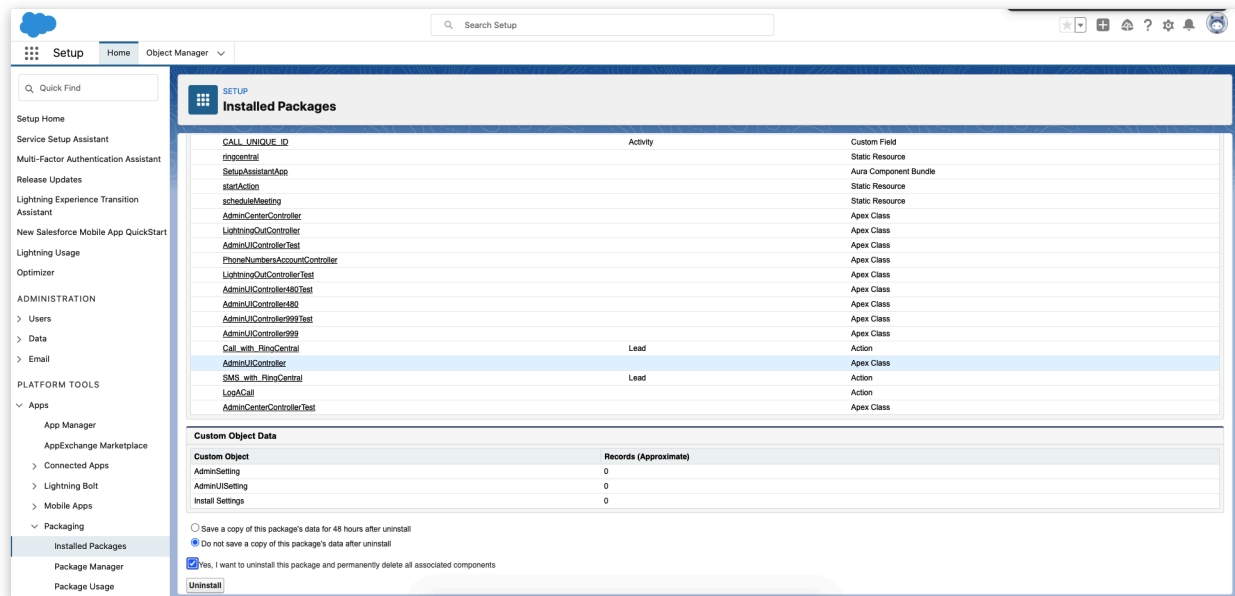
Navigate to the Salesforce Setup → Apps → Packaging → Installed Packages. All installed packages are listed on the table.



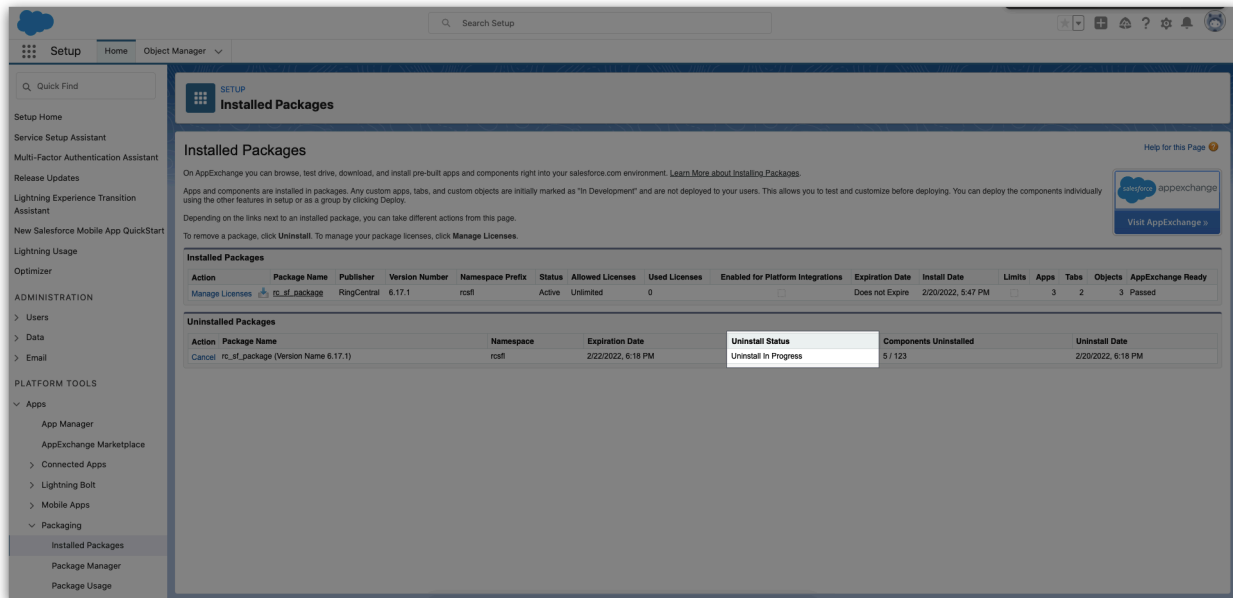
RingCentral for Salesforce application is using the Package Name "rc_sf_package". Click the Uninstall in the Actions. The uninstallation will be initialized.



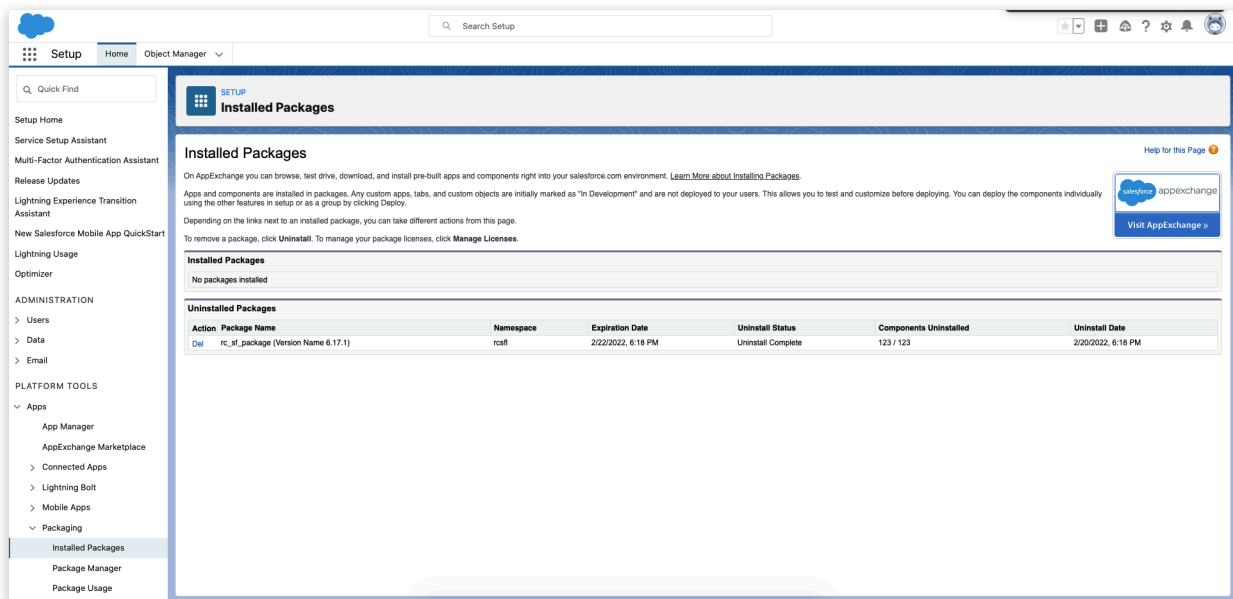
The admin can decide whether save a copy of the package data for later use, and need to confirm the uninstall. And click the Uninstall button to continue.



The packages that are going through the uninstallation process will be listed in the Uninstalled packages table. And the uninstallation status will be shown.



Once the uninstallation is completed, the package will be removed from the Installed Packages table, and the status on the Uninstalled Packages table will be shown Completed.



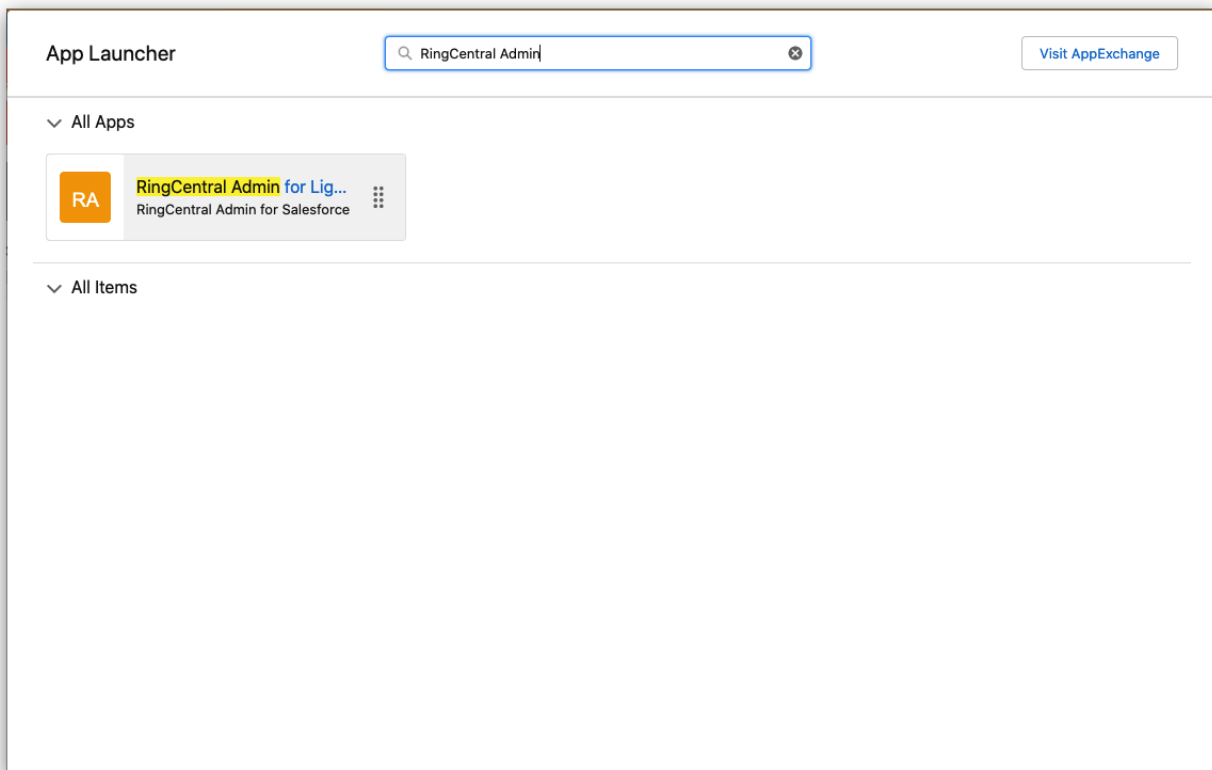
Environment Configuration

Start with the Install Wizard

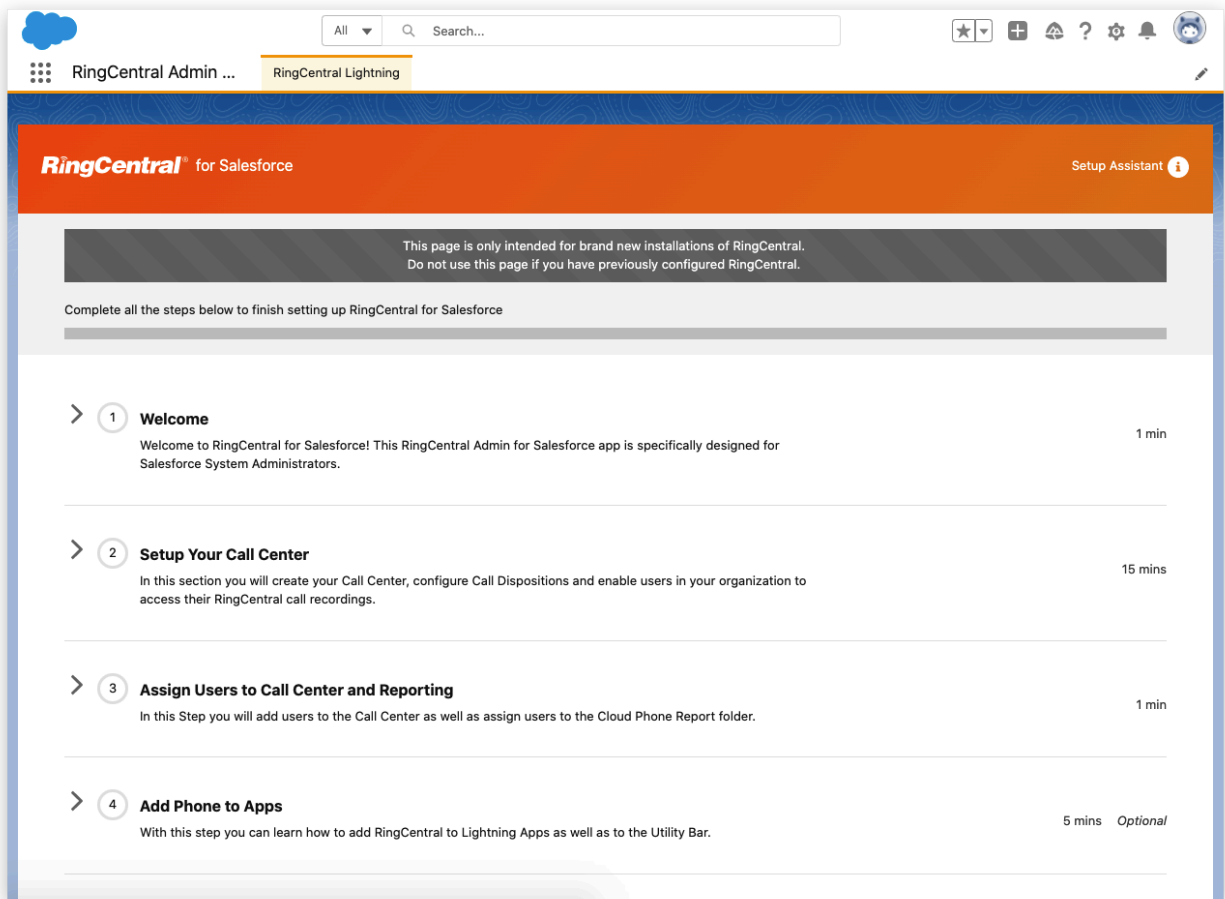
Admins will need to create a proper configuration for the RingCentral for Salesforce working as expected.

The Install Wizard is designed to help the administrator in configuring the Salesforce environment for the RingCentral application.

Admin users can find the RingCentral Admin for Lightning from the App Launcher.



Click to open the app. The Install Wizard will be launched.



Follow the instructions step by step to complete the configuration.

Setup Call Center

About Call Center

The Call Centers is an application in Salesforce that manages Phone Call integrations. Phone Call integration in Salesforce is called Call Center. A Call Center corresponds to a Computerring Telephony Integration (CTI) in Salesforce. Any CTI should be registered to the Call Centers to be enabled in Salesforce applications.

Create a Call Center

The admin can either create a call center automatically or manually. As long as it was created in correct steps, it could work correctly.

Option 1: Auto generate a Call Center for RingCentral

Click the Create Call Center button

Step 1.1 Auto generate Call Center

To create a Call Center for your organization click on the "Create Call Center" button. Make sure there's no existing RingCentral call center in your organization. By selecting the "Create Call Center" button, you will initiate and auto generate your Call Center details.

 Create Call Center

A confirmation message will pop up. The automatically creating call centers is only working when there are no previous call centers created in the Salesforce org. Click the Create button to continue.

Create Call Center

Only use this button if you have not previously configured a call center for RingCentral in this org.

Cancel

Create

The creation will take a few seconds, and the status will be shown.

Step 1.1 Auto generate Call Center

To create a Call Center for your organization click on the "Create Call Center" button. Make sure there's no existing RingCentral call center in your organization. By selecting the "Create Call Center" button, you will initiate and auto generate your Call Center details.

 Create Call Center

Call Center was created

Option 2: Manually create a Call Center for RingCentral

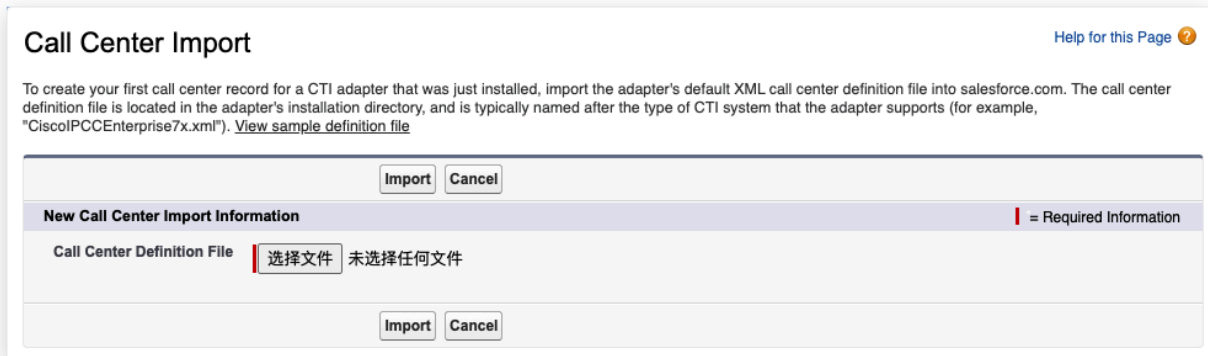
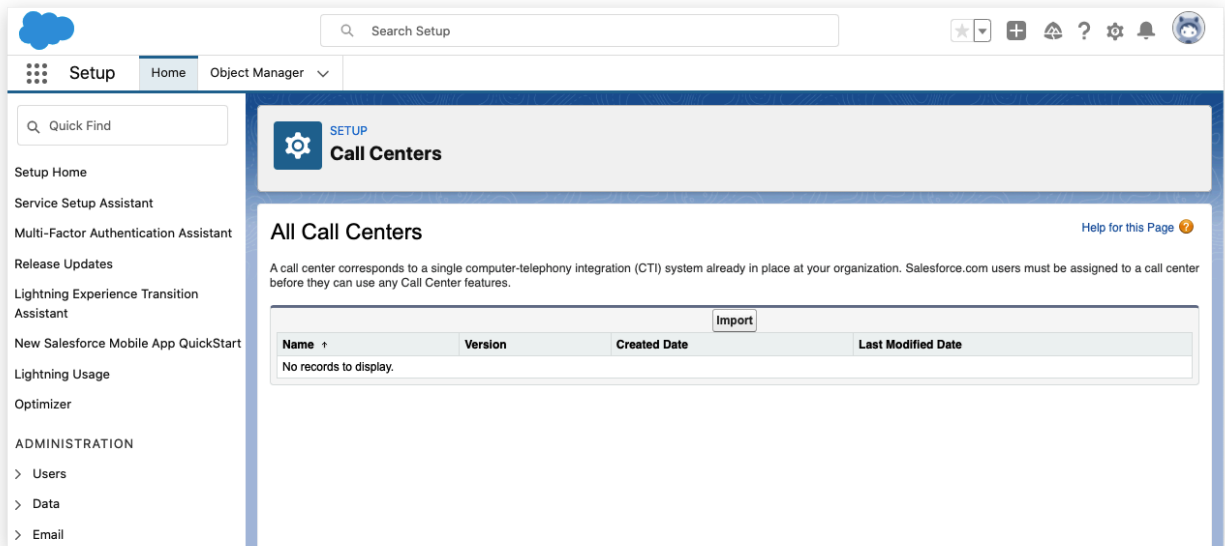
For any reason the automatically creating Call Center is not working, the admin can always create a call center manually.

An XML file will be needed to create a call center. Click the Download XML Setup button, and an XML file will be downloaded.



This XML file is unique for the current Salesforce environment. Do not use it for other environments.

Then click the Manually Create Call Center button. The Call Centers setup page will be open. Click the Import button.



Click the Choose File button, select the XML file that was downloaded, and click the Import button.

A call center will be created.

Call Center
RingCentral
[All Call Centers](#) > RingCentral [Help for this Page](#)

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

General Information

Internal Name	RingCentral
Display Name	RingCentral
CTI Adapter URL	https://ringcentral12-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 Help](#)

Call Center Users by Profile

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

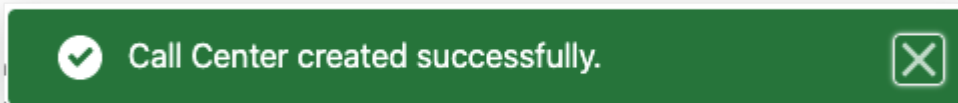
Now go back to the Install Wizard and click the Verify Call Center button.

Step 2: Verify Call Center

To verify if the call center is successfully created within Salesforce, click "Verify Call Center" button.

[Verify Call Center](#)

A confirmation notification will pop up.



Assign Users to a Call Center

Click the Launch Salesforce User Assignment button and the Call Center that was created will be opened.

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.

 [Launch Salesforce User Assignment](#)

 [Open Setup Guide Window](#)

Call Center
RingCentral
[All Call Centers](#) » RingCentral [Help for this Page](#) 


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

General Information

Internal Name	RingCentral
Display Name	RingCentral
CTI Adapter URL	https://ringcentral12-dev-ed--rscfl.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 Help](#) 

Call Center Users by Profile

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

Click the Manage Call Center Users button.

Call Center Help for this Page ?

RingCentral: Manage Users

[All Call Centers](#) » [RingCentral](#) » [Manage Users](#)

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

Add More Users Remove Users

Full Name ↑	Alias	Username	Role	Profile
No records to display.				

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

Click the Add More Users button.

Call Center Help for this Page ?

RingCentral: Search for New Users

[All Call Centers](#) » [RingCentral](#) » [Manage Users](#) » [Search for New Users](#)

Set the search criteria below and then click Search to find salesforce.com users who should be enabled as call center agents. Users already enabled as call center agents are excluded from the search results.

<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input style="border: 1px solid #00a0e3;" type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND

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: 2/20/2022
- For date/time fields, enter the value in following format: 2/20/2022, 10:28 PM

Salesforce is providing a searching tool to filter the target users. Input all needed and click the Find button. The users that fit the criteria will be listed in the table. Select all needed users and click the Add to Call Center button.

	Full Name	Alias	Username	Role	Profile
<input type="checkbox"/>	Demo_RingCentral	RDemo	albert@ringcentral.demo		System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@00d8c000004sgoeaaq.com		Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d8c000004sgoeaaq.com		Analytics Cloud Security User

All users that were assigned to the call center will be listed on the table. The admin can always remove the assignment here at any time.

Call Center
RingCentral: Manage Users [Help for this Page](#)

[All Call Centers](#) » [RingCentral](#) » [Manage Users](#)

View: [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Profile
<input type="checkbox"/> Remove	Demo_RingCentral	RDemo	albert@ringcentral.demo		System Administrator
<input type="checkbox"/> Remove	User_Integration	integ	integration@00d8c00004sgoeaq.com		Analytics Cloud Integration User
<input type="checkbox"/> Remove	User_Security	sec	insightssecurity@00d8c00004sgoeaq.com		Analytics Cloud Security User

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

Setup Softphone Layout

About Softphone Layout

A SoftPhone Layout is a set of CTI interaction rules in Salesforce. It's deciding the CTI behavior for a user.

Admins could set up multiple SoftPhone Layouts as needed. But a user can only be assigned to one Softphone Layout.

Create a Softphone Layout

The Salesforce creates a default Softphone Layout. The Admin is allowed to use it, or create a new one. Click the New button to create a new layout, or click the Edit button to edit the current layout.

Search Setup

Setup Home Object Manager

soft

- Feature Settings
 - Service
 - Call Center
 - Softphone Layouts**

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

Softphone Layouts [Help for this Page](#)

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 is working on a machine on which a CTI adapter has been installed. Similar to page layouts, you 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	Last Modified By Alias	Last Modified Date
Edit	Standard Softphone Layout	<input checked="" type="checkbox"/>	RDemo	2/20/2022, 10:08 PM	RDemo	2/20/2022, 10:08 PM

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.

Name Is Default Layout

Select Call Type ▾

Softphone Layout Help about this section ?

Display these call-related fields:

- ▶ Caller ID, Dialed Number Edit

Display these salesforce.com objects:

- ▶ Contact, Account, Lead, Case Add / Remove Objects

- ▶ **If single Contact found, display:** Name, Title Edit
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
- ▶ **If single Account found, display:** Account Name, Type, Account Number Edit
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 Lead found, display:** Name, Company, Title, Lead Source Edit
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
- ▶ **If single Case found, display:** Case Number, Status, Priority Edit
If multiple matches are found, only the Case Number is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

Screen Pop Settings Help about this section ?

- ▶ **Screen pops open within:** Existing browser window Edit
- ▶ **No matching records:** Don't pop any screen Edit
- ▶ **Single-matching record:** Pop detail page Edit
- ▶ **Multiple-matching records:** Don't pop any screen Edit

There are 2 sessions in the Softphone Layout setting. The 1st part, the Softphone Layout setting, is for the matching strategy. See more details in setting up a matching strategy.

The 2nd part, the Screen Pop Settings, is impacting the users who are using the current Softphone Layout. Admin can decide the behavior on different cases of matching.

Screen Pop Settings
Help about this section ?

Screen pops open within: Existing browser window Collapse

Existing browser window

New browser window or tab

No matching records: Don't pop any screen Collapse

Don't pop any screen

Pop to new --None--

Pop to Visualforce page

Pop to flow --None--

Single-matching record: Pop detail page Collapse

Don't pop any screen

Pop detail page

Pop to Visualforce page

Pop to flow --None--

Multiple-matching records: Don't pop any screen Collapse

Don't pop any screen

Pop to search page

Pop to Visualforce page

Pop to flow --None--

Assign Users to a Softphone Layout

An user can only be assigned to a Softphone Layout. On the Softphone Layout homepage, click the Softphone Layout Assignment button to continue.

Softphone Layouts

Help for this Page ?

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 is working on a machine on which a CTI adapter has been installed. Similar to page layouts, you can design custom softphone layouts and assign them to call center users based on their user profile.

		New	Softphone Layout Assignment			
Action	Name ↑	Default	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
Edit	RingCentral Layout	<input checked="" type="checkbox"/>	RDemo	2/20/2022, 10:08 PM	RDemo	2/21/2022, 12:02 AM

The Softphone Layout is assigned by user profiles. The admin can select the Softphone Layout to assign to any user profile. The default layout will be assigned to all the profiles if there's no further setup.

Softphone Layout Assignment

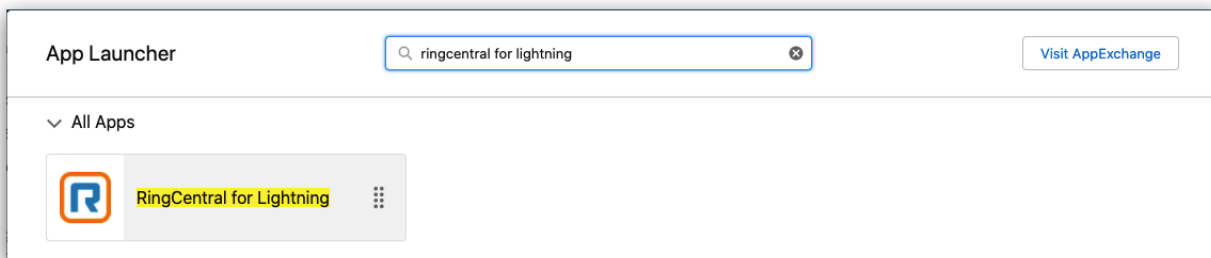
[Help for this Page](#)

Assign a softphone layout to each profile in the list below. Only profiles that include call center agents or to which a softphone layout has already been assigned are displayed.

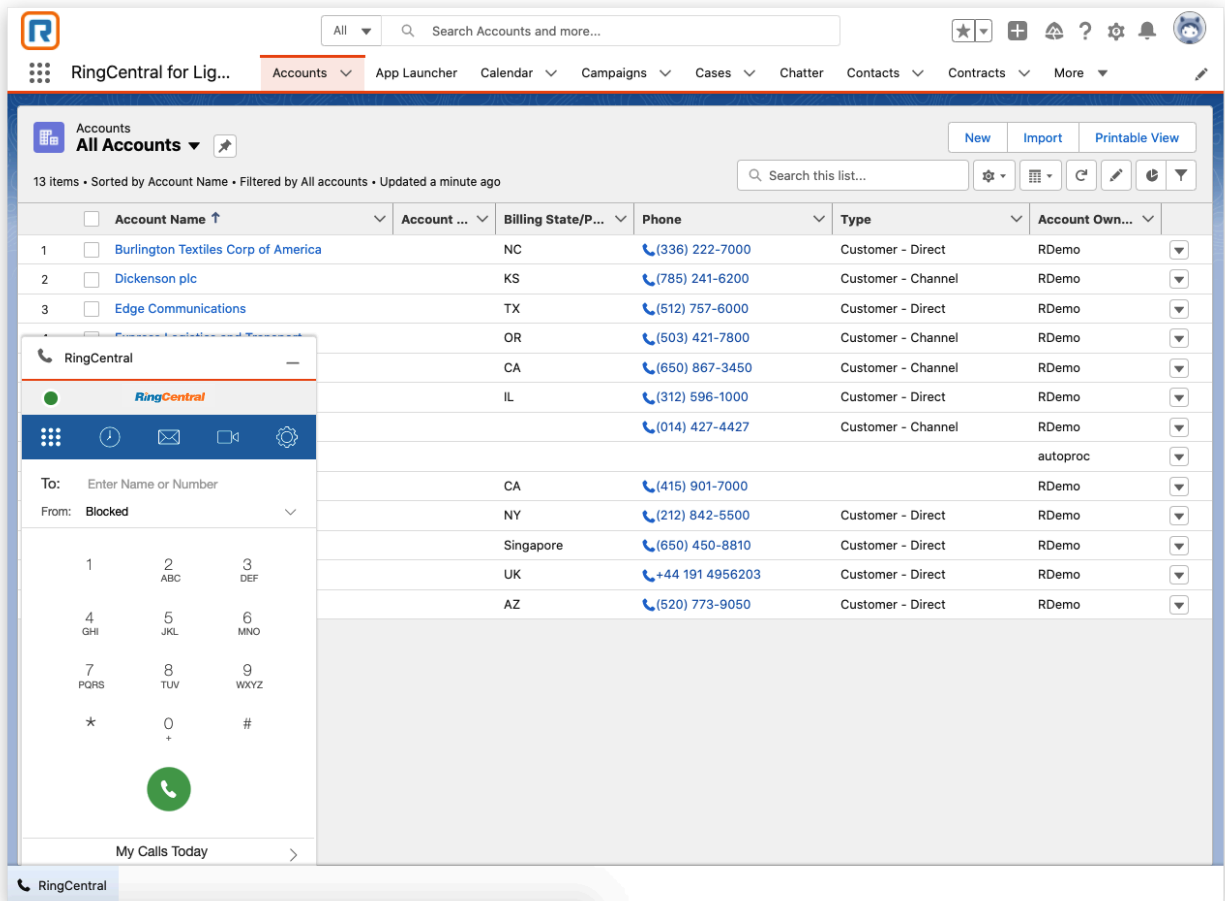
Profile	Layout
Analytics Cloud Integration User (1)	✓ -- Default -- RingCentral Layout
Analytics Cloud Security User (1)	-- Default --
System Administrator (1)	-- Default --

Enable RingCentral in the Salesforce.com Apps

The RingCentral for Salesforce package installs a RingCentral for Lightning application in Salesforce.



In this App, all usually used entities are enabled. And the CTI utility is also been added. The user could use the CTI directory in this App.



But there are still many other applications in Salesforce. Admin can enable the CTI by the following steps.

Add CTI to Apps

Click the Launch Salesforce Setup button on Step 4 in the Install Wizard. Click it to open the App Manager.

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

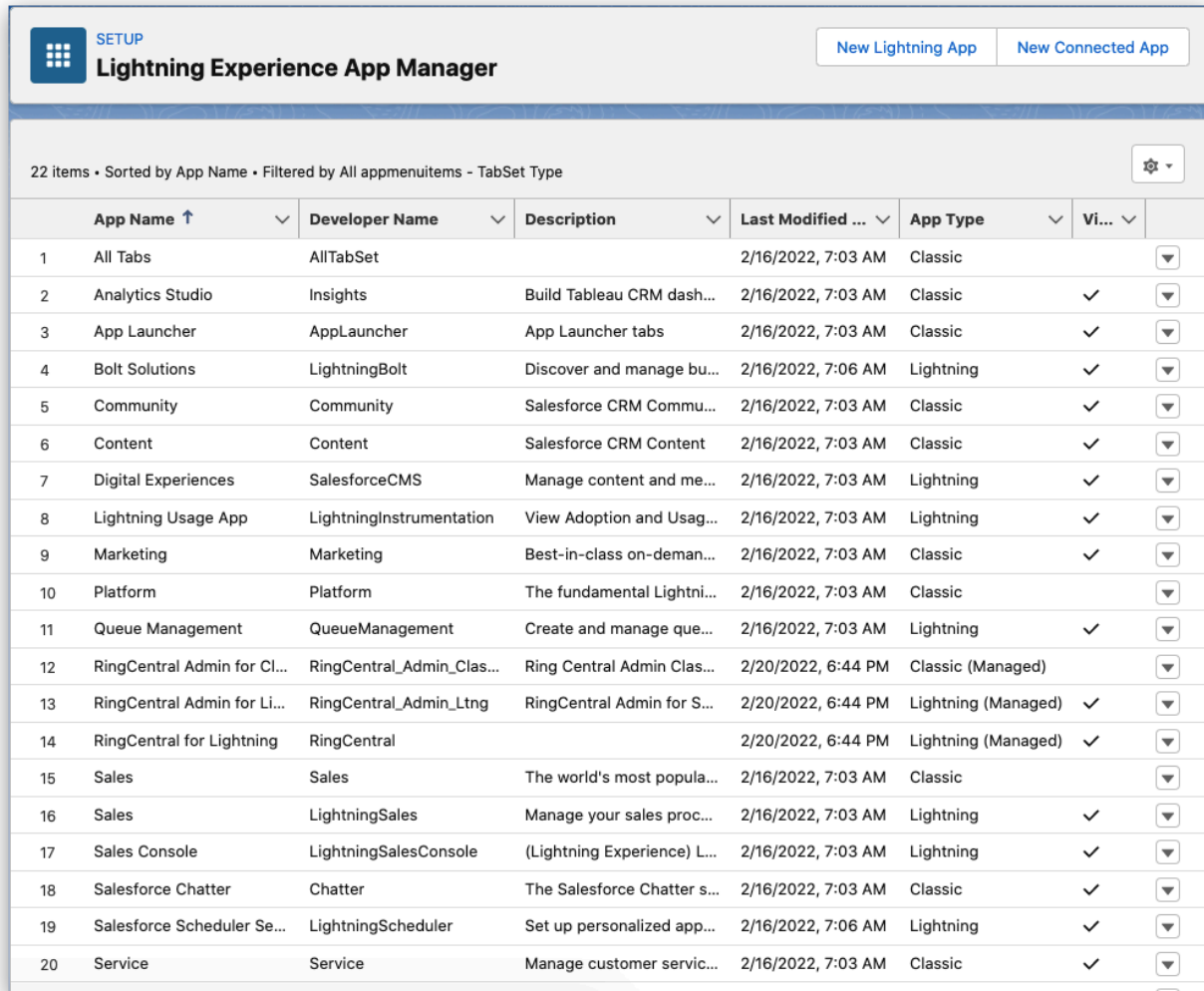
[Launch Salesforce Setup](#)

[Open Setup Guide Window](#)

RingCentral

The Admin can also find the App Manager by the following path: Setup → Apps → App Manager.

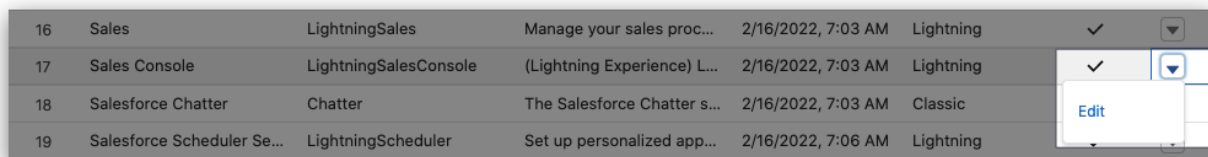
All the apps that were installed or created will be listed on this view.



The screenshot shows the 'Lightning Experience App Manager' interface. At the top, there are buttons for 'New Lightning App' and 'New Connected App'. Below the header, it indicates '22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type'. The main content is a table with columns: App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The table lists various apps such as All Tabs, Analytics Studio, App Launcher, Bolt Solutions, Community, Content, Digital Experiences, Lightning Usage App, Marketing, Platform, Queue Management, RingCentral Admin for Cl..., RingCentral Admin for Li..., RingCentral for Lightning, Sales, Sales Console, Salesforce Chatter, and Service.

	App Name ↑	Developer Name	Description	Last Modified ...	App Type	Vi...	
1	All Tabs	AllTabSet		2/16/2022, 7:03 AM	Classic		▼
2	Analytics Studio	Insights	Build Tableau CRM dash...	2/16/2022, 7:03 AM	Classic	✓	▼
3	App Launcher	AppLauncher	App Launcher tabs	2/16/2022, 7:03 AM	Classic	✓	▼
4	Bolt Solutions	LightningBolt	Discover and manage bu...	2/16/2022, 7:06 AM	Lightning	✓	▼
5	Community	Community	Salesforce CRM Commu...	2/16/2022, 7:03 AM	Classic	✓	▼
6	Content	Content	Salesforce CRM Content	2/16/2022, 7:03 AM	Classic	✓	▼
7	Digital Experiences	SalesforceCMS	Manage content and me...	2/16/2022, 7:03 AM	Lightning	✓	▼
8	Lightning Usage App	LightningInstrumentation	View Adoption and Usag...	2/16/2022, 7:03 AM	Lightning	✓	▼
9	Marketing	Marketing	Best-in-class on-deman...	2/16/2022, 7:03 AM	Classic	✓	▼
10	Platform	Platform	The fundamental Lightni...	2/16/2022, 7:03 AM	Classic		▼
11	Queue Management	QueueManagement	Create and manage que...	2/16/2022, 7:03 AM	Lightning	✓	▼
12	RingCentral Admin for Cl...	RingCentral_Admin_Clas...	Ring Central Admin Clas...	2/20/2022, 6:44 PM	Classic (Managed)		▼
13	RingCentral Admin for Li...	RingCentral_Admin_Ltng	RingCentral Admin for S...	2/20/2022, 6:44 PM	Lightning (Managed)	✓	▼
14	RingCentral for Lightning	RingCentral		2/20/2022, 6:44 PM	Lightning (Managed)	✓	▼
15	Sales	Sales	The world's most popula...	2/16/2022, 7:03 AM	Classic		▼
16	Sales	LightningSales	Manage your sales proc...	2/16/2022, 7:03 AM	Lightning	✓	▼
17	Sales Console	LightningSalesConsole	(Lightning Experience) L...	2/16/2022, 7:03 AM	Lightning	✓	▼
18	Salesforce Chatter	Chatter	The Salesforce Chatter s...	2/16/2022, 7:03 AM	Classic	✓	▼
19	Salesforce Scheduler Se...	LightningScheduler	Set up personalized app...	2/16/2022, 7:06 AM	Lightning	✓	▼
20	Service	Service	Manage customer servic...	2/16/2022, 7:03 AM	Classic	✓	▼

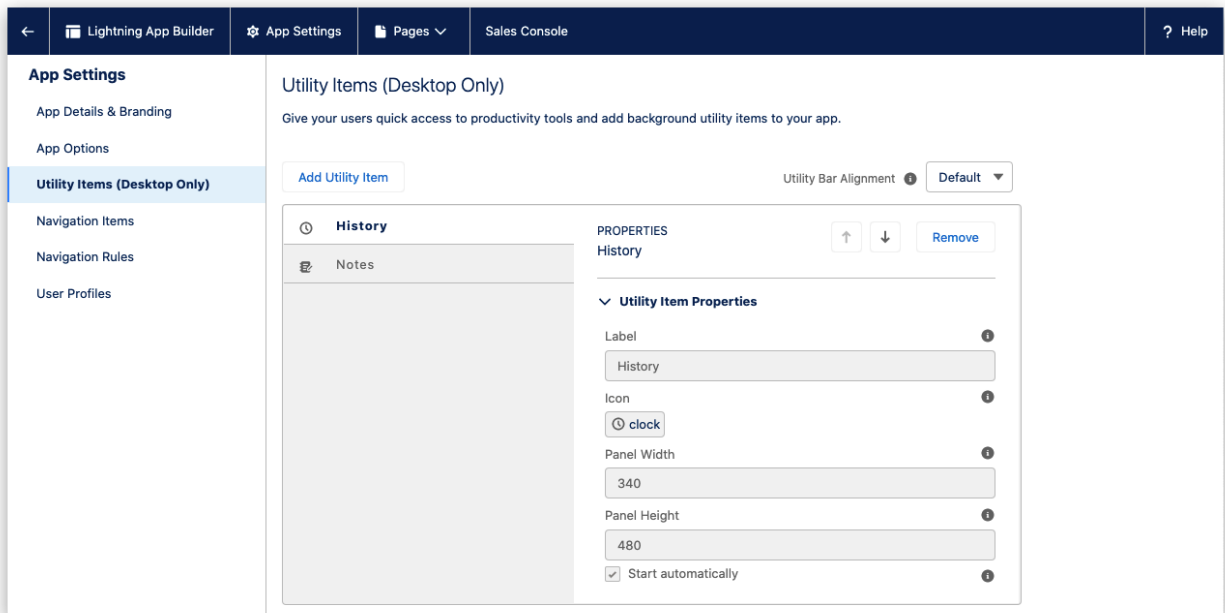
To add the CTI to a Lightning app, click on the dropdown button and select Edit.



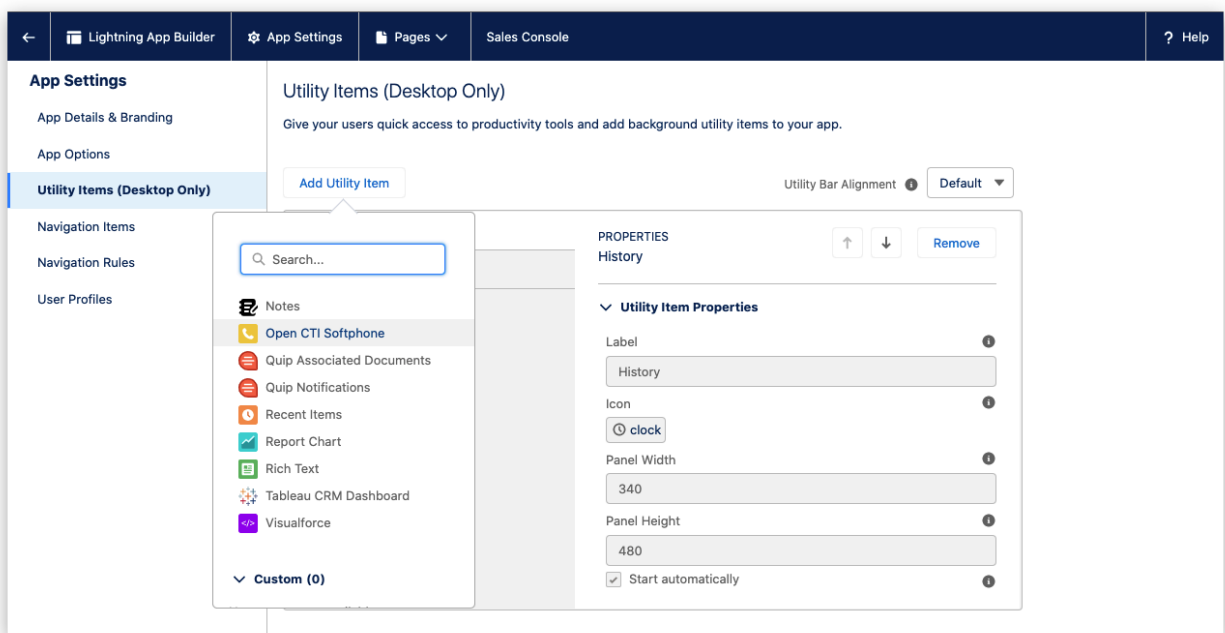
This close-up shows the 'Sales Console' row (row 17) from the table above. The dropdown menu for the 'Sales Console' app is open, and the 'Edit' option is highlighted.

16	Sales	LightningSales	Manage your sales proc...	2/16/2022, 7:03 AM	Lightning	✓	▼
17	Sales Console	LightningSalesConsole	(Lightning Experience) L...	2/16/2022, 7:03 AM	Lightning	✓	▼
18	Salesforce Chatter	Chatter	The Salesforce Chatter s...	2/16/2022, 7:03 AM	Classic	✓	▼
19	Salesforce Scheduler Se...	LightningScheduler	Set up personalized app...	2/16/2022, 7:06 AM	Lightning	✓	▼

The App Settings tool will be opened. Navigate to the Utility Items tab (Desktop Only).



Click the Add Utility Item button, select the Open CTI Softphone.

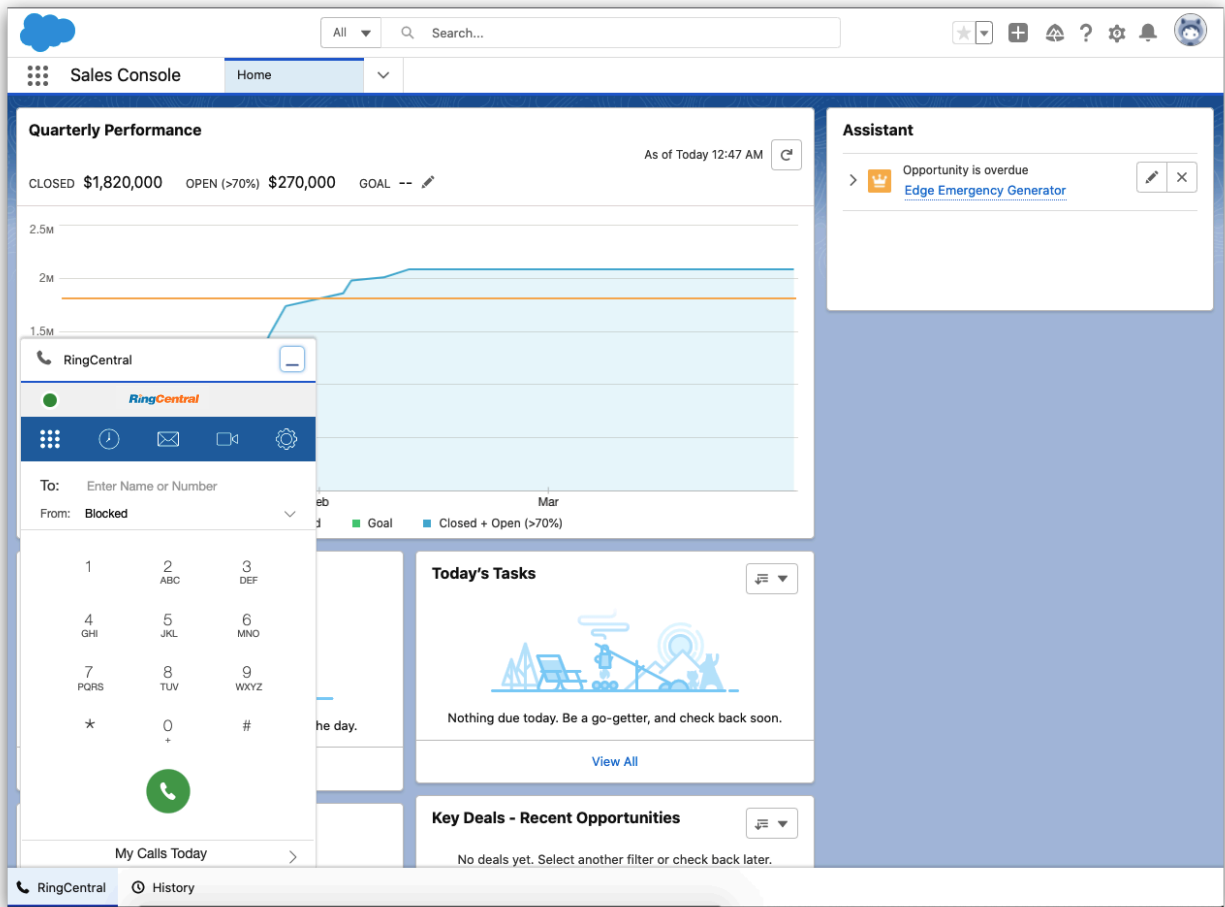


Edit the Label as needed, keep others as default, and Save the configuration.

The screenshot displays the RingCentral Lightning App Builder interface. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', 'Sales Console', and 'Help'. The left sidebar is titled 'App Settings' and contains the following menu items: 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)' (which is currently selected), 'Navigation Items', 'Navigation Rules', and 'User Profiles'. The main content area is titled 'Utility Items (Desktop Only)' and includes the instruction: 'Give your users quick access to productivity tools and add background utility items to your app.' Below this instruction is an 'Add Utility Item' button and a 'Utility Bar Alignment' dropdown menu set to 'Default'. A utility item is currently configured with the following properties:

- RingCentral** (with a phone icon)
- PROPERTIES**: Open CTI Softphone (with up/down arrows and a 'Remove' button)
- Utility Item Properties**:
 - Label**: RingCentral
 - Icon**: call (with a close icon)
 - Panel Width**: 340
 - Panel Height**: 480
 - Start automatically**

Open the App, and the CTI will show on the utility bar.



Add the RingCentral Global Actions

The Global Action is a quick action entry in Salesforce. It could be configured and assigned to a user group.

Enter the Global Actions set up by the following path: Setup → User Interface → Global Actions → Global Actions.

Global Actions

Create, edit, and view global actions, which can be used on detail pages, the home page, and the Chatter tab.

Action	Label	Name	Description	Target Object	Type	Content Source	Icon
Edit Del Layout	Email	SendEmail			Send Email	Action Layout Editor	
Edit Layout	Log a Call	LogACall			Log a Call	Action Layout Editor	
Edit Del Layout	Log a Call	LogACall			Log a Call	Action Layout Editor	
Edit Del Layout	New Account	NewAccount		Account	Create a Record	Action Layout Editor	
Edit Del Layout	New Case	NewCase		Case	Create a Record	Action Layout Editor	
Edit Del Layout	New Contact	NewContact		Contact	Create a Record	Action Layout Editor	
Edit Layout	New Event	NewEvent		Event	Create a Record	Action Layout Editor	
Edit Del Layout	New Event	NewEvent		Event	Create a Record	Action Layout Editor	
Edit Del Layout	New Group	NewGroup		Group	Create a Record	Action Layout Editor	
Edit Del Layout	New Lead	NewLead		Lead	Create a Record	Action Layout Editor	
Edit Del Layout	New Note	NewNote		Note	Create a Record	Action Layout Editor	
Edit Del Layout	New Opportunity	NewOpportunity		Opportunity	Create a Record	Action Layout Editor	
Edit Layout	New Task	NewTask		Task	Create a Record	Action Layout Editor	
Edit Del Layout	New Task	NewTask		Task	Create a Record	Action Layout Editor	
Edit	Schedule RingCentral Video meeting	Schedule_Meeting	schedule a video meeting		Custom Visualforce	ScheduleMeetingAction (Visualforce)	
Edit	Start RingCentral Video meeting	Start_Meeting	start a video meeting		Custom Visualforce	StartMeetingAction (Visualforce)	

In this view, all Global Actions are listed. Including the

- Schedule RingCentral Video meeting
- Start RingCentral Video meeting

Navigate to the Publisher Layouts, create a new layout or edit the current one.

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. After creating 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.

Action	Publisher Layout Name	Created By	Modified By
Edit Del	Global Layout	RingCentral Demo, 2/16/2022, 7:03 AM	RingCentral Demo, 2/16/2022, 7:03 AM

Navigate to the Mobile & Lightning Actions configuration.

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 ✕

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

Global Publisher

Quick Actions in the Salesforce Classic

Publisher

PostFileNew EventNew TaskNew ContactLog a CallNew OpportunityNew Case

New LeadLinkPollQuestionEmail

Salesforce Mobile and Lightning

Experience Actions i

PostFileNew EventNew TaskNew ContactLog a CallNew OpportunityNew Case

New LeadLinkPollQuestionEmail

Drag the RingCentral actions to the place that needed. And Save the setting.

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 Quick Action Name ✕

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

Global Publisher

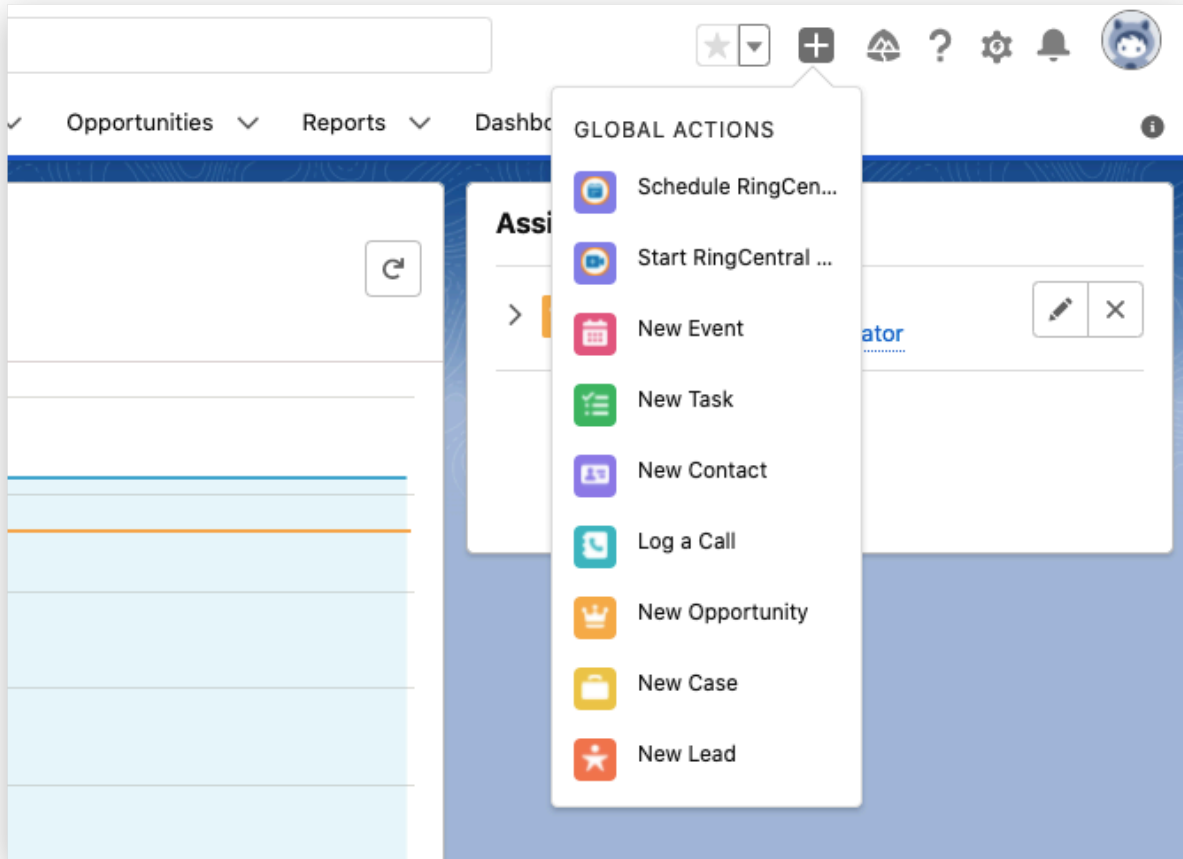
Quick Actions in the Salesforce Classic Publisher

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 ⓘ

Schedule RingCentral Video meeting Start RingCentral Video meeting Post File New Event New Task
New Contact Log a Call New Opportunity New Case New Lead Link Poll Question Email

Assign the layout to user profiles that are needed. And users can find the RingCentral actions in the Global action entry.



Enable RingCentral in the Salesforce Mobile

The RingCentral for Salesforce application provides 2 actions:

- Call with RingCentral
- SMS with RingCentral

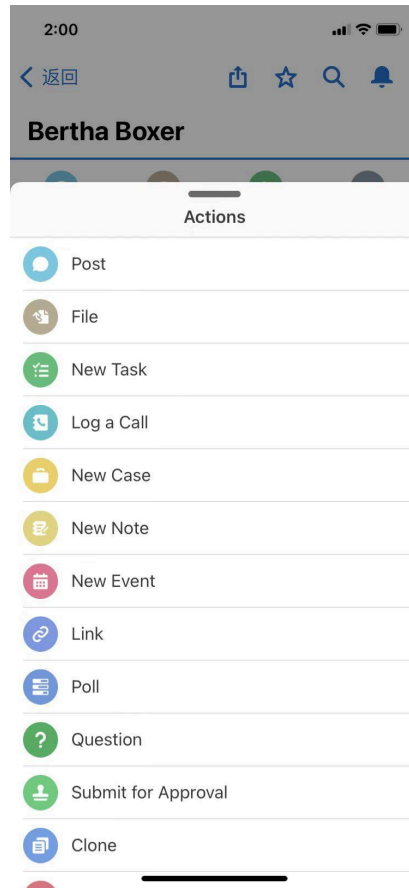
Both of the actions require the RingCentral Mobile application. Users could install the RingCentral mobile from Google Play (Android) or App Store (iOS).

Add RingCentral Mobile Actions on the Mobile App

The admin needs to set up for each record type that needs the Call or SMS with RingCentral actions.

The following example is adding the RingCentral actions to the Lead record. Other types of records is following the same setup flow.

Before any configuration, the Lead record layout on mobile contains the below actions as the attached image.



Navigate by the record's page layout setting by Setup → Object Manager → Lead → Page Layouts

SETUP > OBJECT MANAGER

Lead

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

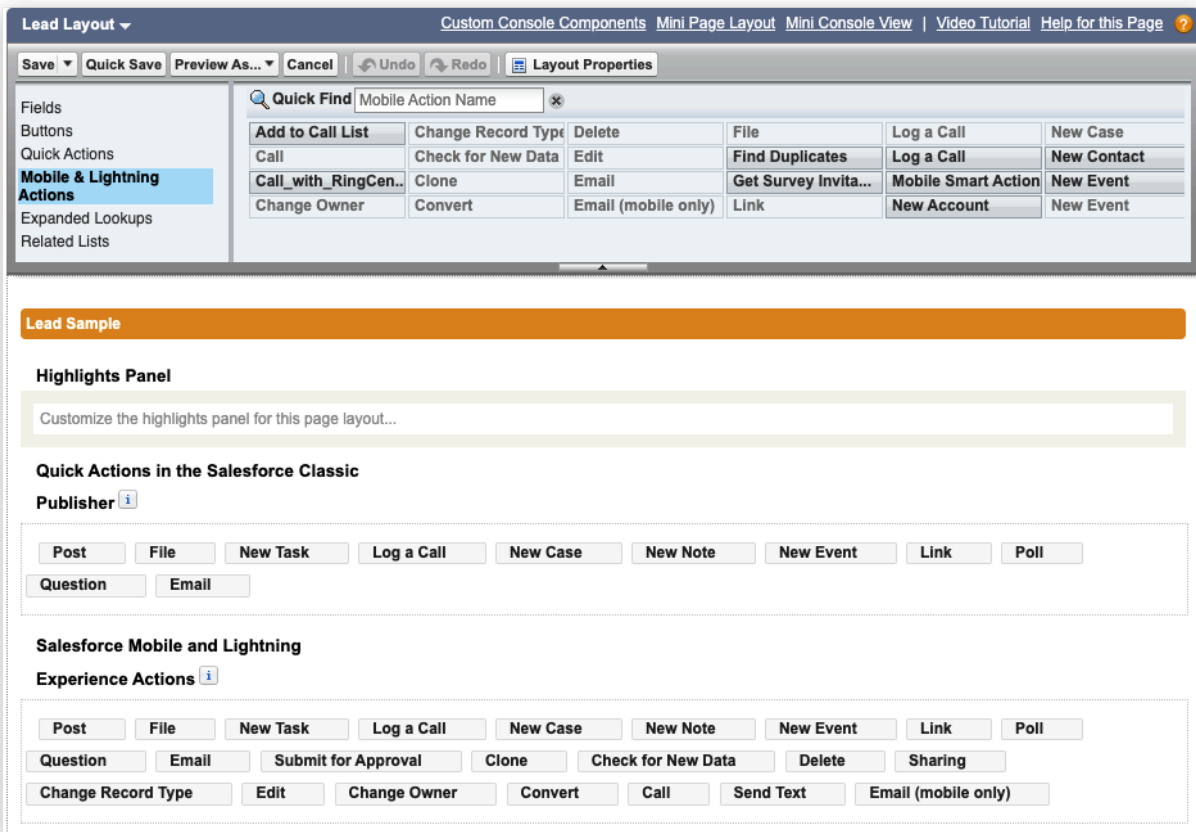
Object Limits

Page Layouts
4 Items, Sorted by Page Layout Name

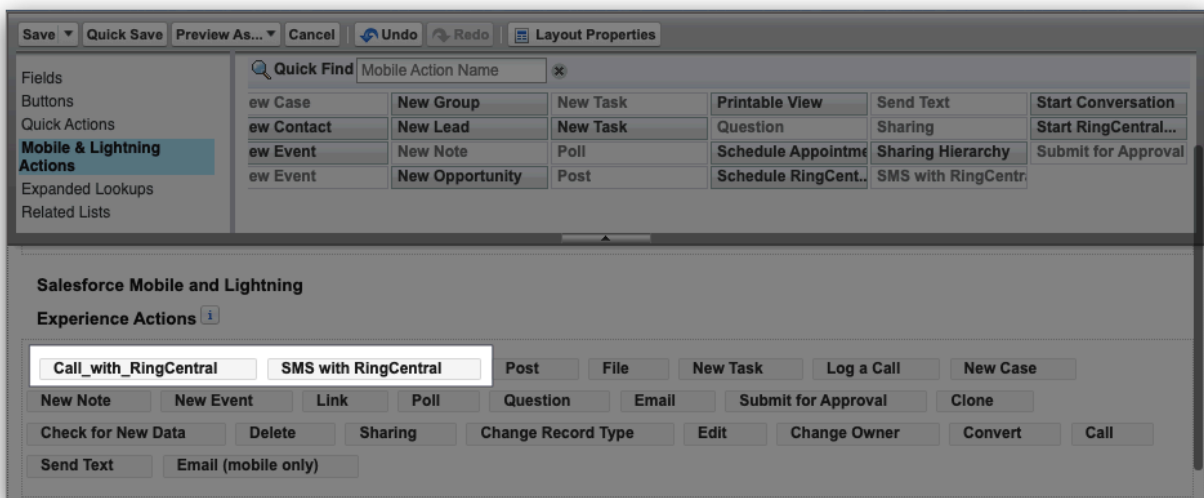
Quick Find [New](#) [Page Layout Assignment](#)

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Lead (Marketing) Layout	RingCentral Demo, 2/16/2022, 7:03 AM	RingCentral Demo, 2/16/2022, 7:03 AM	▼
Lead (Sales) Layout	RingCentral Demo, 2/16/2022, 7:03 AM	RingCentral Demo, 2/16/2022, 7:03 AM	▼
Lead (Support) Layout	RingCentral Demo, 2/16/2022, 7:03 AM	RingCentral Demo, 2/16/2022, 7:03 AM	▼
Lead Layout	RingCentral Demo, 2/16/2022, 7:03 AM	RingCentral Demo, 2/16/2022, 7:03 AM	▼

All Layouts in this org are listed here. Select the needed one to edit.

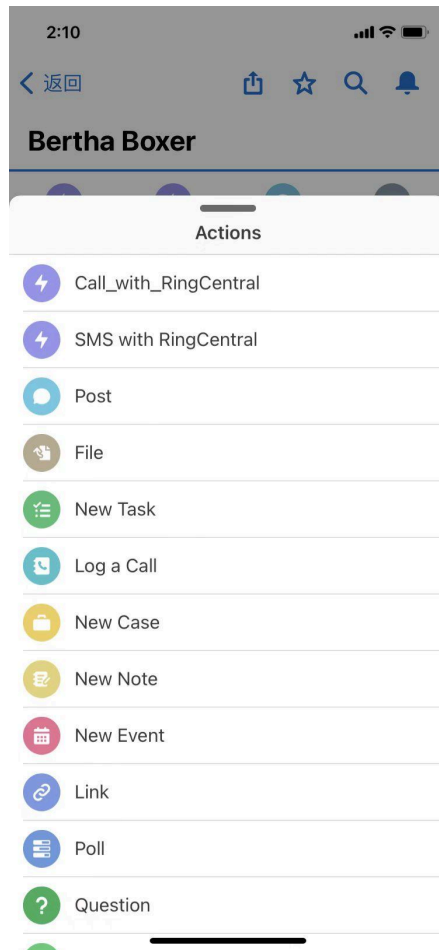


Select Mobile & Lightning Actions and drag the Call_with_RingCentral and SMS with RingCentral to the target location.





Save the layout. Relaunch the Salesforce Mobile app, both of the actions will be listed on the Lead record action list.



Analysis and Reports

RingCentral for Salesforce provides native and self-defined data reports. Users could take advantage of these reports by building their own or updating data or formulas to create new reports as needed.

The Analytics Report provides simple access for users to have a good understanding of the team and the individual performance.

Pre-build Salesforce Reports

Launch the RingCentral for Lightning app or any other apps that contain the Reports. Click All Folders

The screenshot shows the RingCentral interface for the 'Reports' section. The top navigation bar includes 'RingCentral for Lig...', 'Accounts', 'App Launcher', 'Calendar', 'Campaigns', 'Cases', 'Chatter', 'Contacts', 'Reports', and 'More'. The main content area is titled 'Reports' and 'All Folders' with a search bar and buttons for 'New Report', 'New Report (Salesforce Classic)', and 'New Folder'. A table lists reports under the 'All Folders' view:

	Name	Created By	Created On	Last Modified By	Last Modified Date	
Recent	Cloud Phone Report	RingCentral Demo	2/20/2022, 6:43 PM	RingCentral Demo	2/20/2022, 6:43 PM	⌵
Created by Me	Einstein Bot Reports	Automated Process	2/16/2022, 7:03 AM	Automated Process	2/16/2022, 7:03 AM	⌵

The left sidebar contains categories: REPORTS (Recent, Created by Me, Private Reports, Public Reports, All Reports), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites). The 'All Folders' folder is currently selected.

The RingCentral package creates the Cloud Phone Report folder. To control access to this report folder, click the dropdown and select Share.

Share folder

These sharing settings apply to all subfolders in this folder.

Share With

Users

Names Access

Search Users... View

Share

Who Can Access

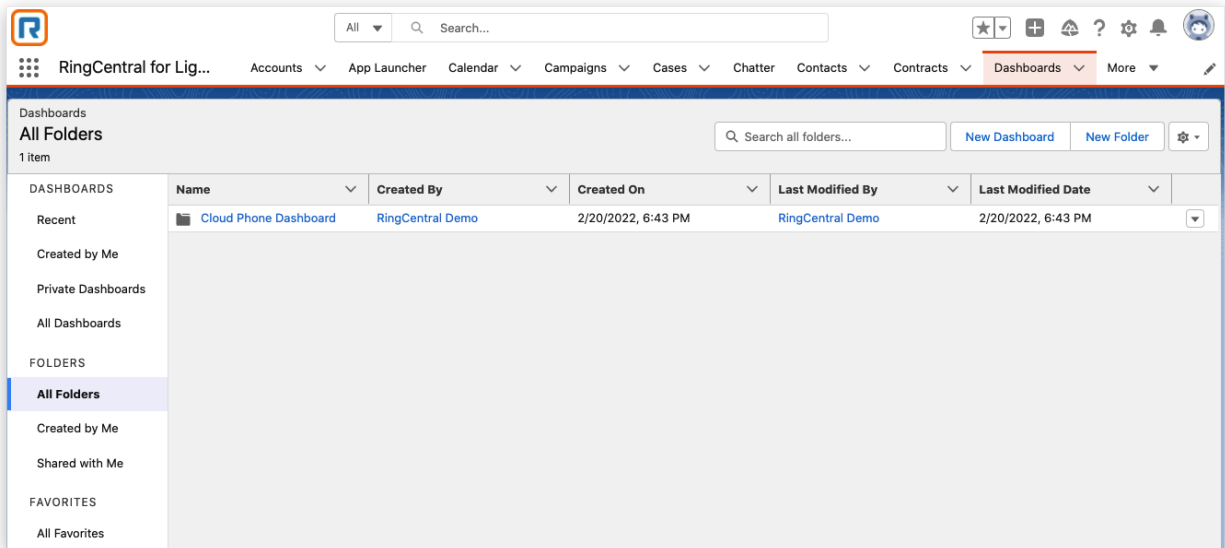
RingCentral Demo Users Manage

Done

enter filter conditions and click Done.

Pre-build Salesforce Dashboard

Open the Dashbaords → All Folders. The RingCentral package creates a Cloud Phone Dashboard folder. To share the folder with more users, click the dropdown and select Share.



Analytics Report

The Analytics Report is a handy dashboard that shows some key data of a team, or individually, depending on the role of the current user in Salesforce.

For example, User A had been assigned to the Remote Sales Manager role in this org. And User B, C, D had been assigned to the Remote Saler role in this org. Then User A can see all data of B, C, D. And User B, C, D can only see their own data in the Analytics Report.

The screenshot shows the RingCentral Setup interface for managing roles. The left sidebar contains navigation options like 'Setup Home', 'Service Setup Assistant', and 'Users'. The main content area is titled 'Roles' and 'Creating the Role Hierarchy'. It displays a hierarchical tree of roles for 'RingCentral', starting with 'CEO' and branching down to various departments like 'SVP, Customer Service & Support' and 'VP, Marketing'. A 'Remote Sales Manager' role is highlighted, with a sub-menu showing 'Remote Saler' and 'Add Role' options.

Setup Home Object Manager

Search Setup

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles**
- User Management Settings
- Users

> Data

> Email

PLATFORM TOOLS

> Apps

> Feature Settings

SETUP Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapse All Expand All

- RingCentral
 - Add Role
 - CEO Edit | Del | Assign
 - Add Role
 - CFO Edit | Del | Assign
 - Add Role
 - COO Edit | Del | Assign
 - Add Role
 - SVP, Customer Service & Support Edit | Del | Assign
 - Add Role
 - SVP, Human Resources Edit | Del | Assign
 - Add Role
 - SVP, Sales & Marketing Edit | Del | Assign
 - Add Role
 - VP, International Sales Edit | Del | Assign
 - Add Role
 - VP, Marketing Edit | Del | Assign
 - Add Role
 - VP, North American Sales Edit | Del | Assign
 - Add Role
 - Director, Channel Sales Edit | Del | Assign
 - Add Role
 - Director, Direct Sales Edit | Del | Assign
 - Add Role
 - Eastern Sales Team Edit | Del | Assign
 - Add Role
 - Remote Sales Manager** Edit | Del | Assign
 - Add Role
 - Remote Saler Edit | Del | Assign
 - Add Role

Application Setup

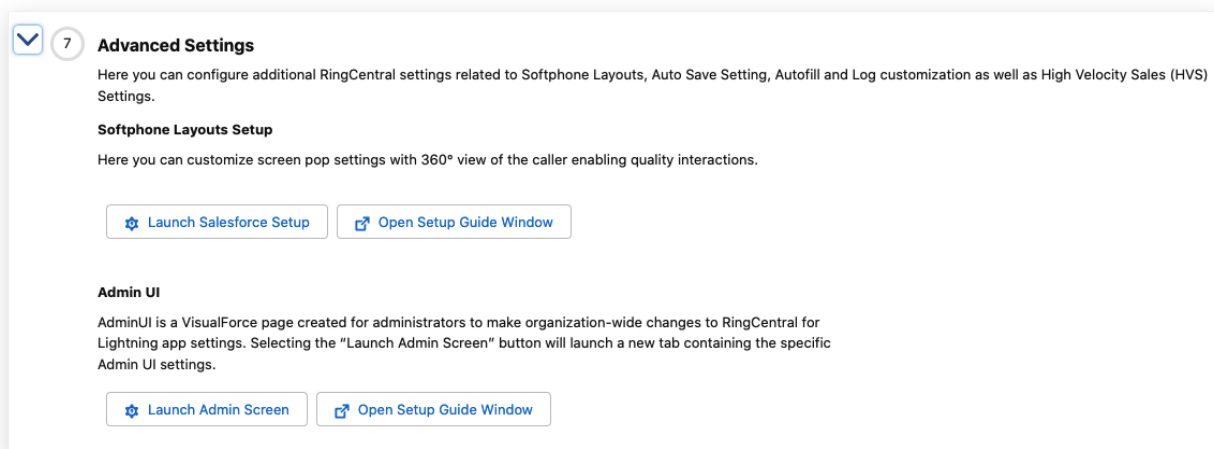
About Admin UI

The Admin UI is designed to allow admin users to control all RingCentral for Salesforce clients behavior under an organization.

There are 2 ways to open the Admin UI.

Option 1: open from the Install Wizard.

From the Advanced Settings, click the Launch Admin Screen.



Option 2: open from Visualforce Pages.

From Setup → Custom Code → Visualforce Pages → click the hyperlink icon of the adminUI

The screenshot shows the Salesforce Setup interface for Visualforce Pages. The left sidebar contains navigation options like 'Setup', 'Home', and 'Object Manager'. The main content area displays a list of Visualforce Pages. The 'adminUI' page is highlighted, and a red arrow points to its 'Label' column.

Action	Label	Name	Namespace Prefix	Api Version	Description	Created By Alias	Created Date	Last Modified By Alias
Security	SetupAssistant	SetupAssistant	rcsfl	48.0		RDemo	2/20/2022, 6:43 PM	RDemo
Security	StartMeetingAction	StartMeetingAction	rcsfl	38.0		RDemo	2/20/2022, 6:43 PM	RDemo
Security	adminUI	adminUI	rcsfl	37.0		RDemo	2/20/2022, 6:43 PM	RDemo
Security	phoneReporter	phoneReporter	rcsfl	45.0		RDemo	2/20/2022, 6:43 PM	RDemo
Security	Phone Numbers SMS Account	Phone_Numbers_SMS_Account	rcsfl	34.0		RDemo	2/20/2022, 6:43 PM	RDemo
Security	Phone Numbers SMS Contact	Phone_Numbers_SMS_Contact	rcsfl	34.0		RDemo	2/20/2022, 6:43 PM	RDemo
Security	Phone Numbers SMS Lead	Phone_Numbers_SMS_Lead	rcsfl	34.0		RDemo	2/20/2022, 6:43 PM	RDemo
Security	ScheduleMeetingAction	ScheduleMeetingAction	rcsfl	38.0		RDemo	2/20/2022, 6:43 PM	RDemo
Security	OpenCTIIndex999	OpenCTIIndex999	rcsfl	38.0		RDemo	2/20/2022, 6:43 PM	RDemo
Security	Phone Numbers Account	Phone_Numbers_Account	rcsfl	34.0		RDemo	2/20/2022, 6:43 PM	RDemo

The Admin UI will be opened.

Cloud Phone Settings

Auto Save Setting

Pop matching Salesforce entity record on call

Auto create call log on

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](#)

Associate Call/SMS Log with Person Account

Associate call/SMS log with Person Accounts using field.

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	SMS Settings
<input type="radio"/> Restrict calls for DNC records i	<input checked="" type="radio"/> Restrict SMS for DNC records i
<input checked="" type="radio"/> Allow override on DNC records i	<input type="radio"/> Allow override on DNC records i

Autofill Related-To in Call Log for Click To Dial

Enhanced autofill "Contact Relationship" when using Click-to-dial.

* With this toggle ON, app will:

- Autofill the name field with "contact" or "lead" when using Click-to-dial.

Salesforce Records Matching Strategy

This is the setup group that controls the matching strategy of the clients in the org.

Settings for Matching Caller Details



The RingCentral for Salesforce supports the Company Directory and the Personal Contacts under the user's RingCentral account. And supports matching the Salesforce records.

This setting controls the matching strategy of matching RingCentral records.

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

Standard Match

With the standard match strategy, the app is using the following record types as record sources:

- Account,
- Contact,
- Lead,
- Case,
- Opportunity,
- Person Account (only when the person account is enabled in the org).

All the records will need to have at least 1 phone type field to be searched as a record.

Custom Object Support

With the custom object support strategy, the app is using all record types that were selected in the Softphone layout as record sources. Both Salesforce standard records and custom objects are supported.

To enable this strategy, select it and click the Save button. And the Admin will need to configure the Softphone layout for customizing record types.

Navigate to the Softphone Layout Setting.

Setup Home Object Manager

Q soft

- Feature Settings
 - Service
 - Call Center
 - Softphone Layouts**
- Einstein
 - Einstein Sales
 - Einstein Activity Capture
 - Microsoft Exchange Connections

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

Softphone Layouts

Help for this Page ?

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 is working on a machine on which a CTI adapter has been installed. Similar to page layouts, you can design custom softphone layouts and assign them to call center users based on their user profile.

Softphone Layout Assignment

Action	Name ↑	Default	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
Edit	cti	<input checked="" type="checkbox"/>	Michael	16/04/2018 09:13	Michael	11/02/2022 16:42
Edit Del	Dialpad	<input type="checkbox"/>	Michael	02/12/2019 10:24	Michael	27/04/2021 15:27
Edit Del	Gracetestlayoput	<input type="checkbox"/>	Michael	12/09/2020 14:05	Michael	12/09/2020 14:05
Edit Del	RingCentral SoftPhone	<input type="checkbox"/>	Michael	05/07/2019 10:50	Michael	30/07/2020 16:29
Edit Del	Test	<input type="checkbox"/>	Michael	10/12/2019 15:36	Michael	10/12/2019 15:36

Open or create a softphone layout that is assigned to a target group.

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.

Name Is Default Layout

Select Call Type **Inbound** ▼

Softphone Layout Help about this section ?

Display these call-related fields:

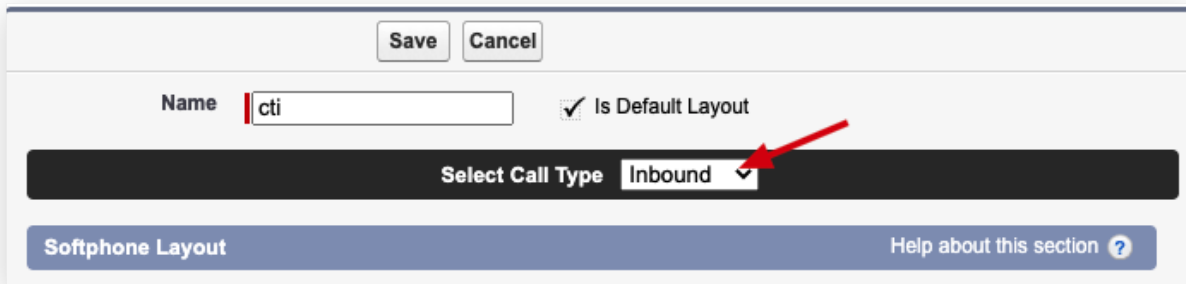
- ▶ Caller ID, Dialed Number Edit

Display these salesforce.com objects:

- ▶ Molly's Test Custom Object, Case, Student, Lead, Opportunity, Icon_test, lacon_test, Contact, Account Add / Remove Objects

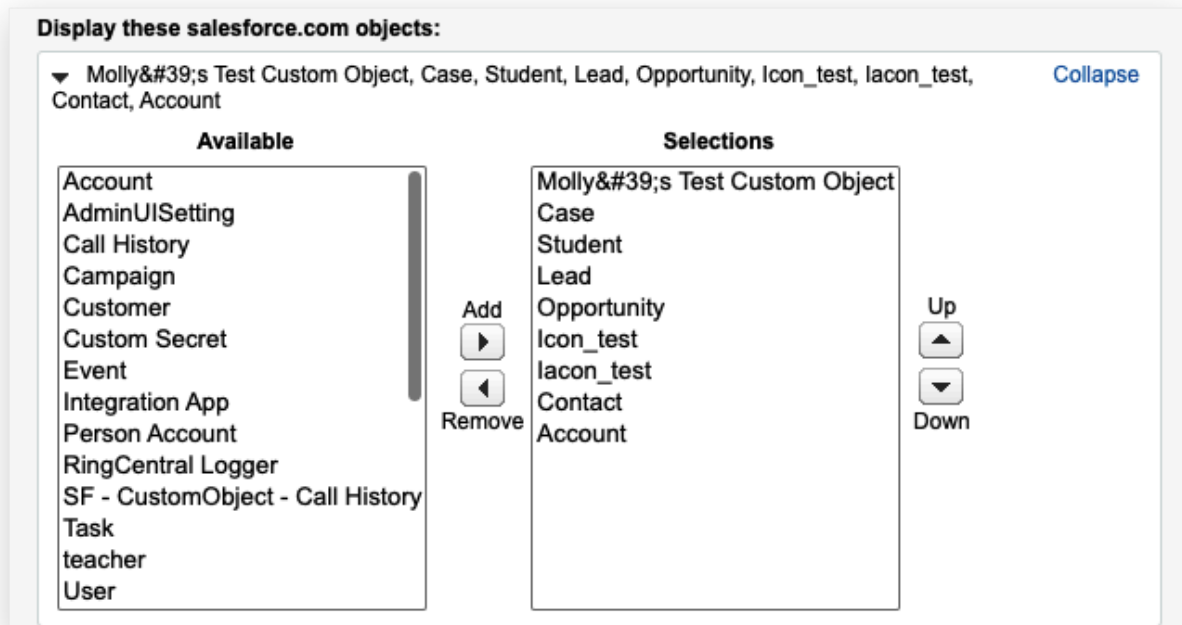
- ▶ **If single Molly's Test Custom Object found, display:** Molly's CustomObject Name, M_describe Edit
If multiple matches are found, only the Molly's CustomObject Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
- ▶ **If single Case found, display:**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

Select the Call Type as Inbound. To simplify the setting, the RingCentral for Salesforce is reading only the Inbound setting as the record source. Do not need to set up the Outbound call type setting.



The screenshot shows a configuration window for a softphone layout. At the top, there are 'Save' and 'Cancel' buttons. Below them, a 'Name' field contains the text 'cti' and a checked 'Is Default Layout' checkbox. A dark horizontal bar contains the text 'Select Call Type' followed by a dropdown menu currently set to 'Inbound', which is highlighted by a red arrow. At the bottom of the window, there is a blue bar with the text 'Softphone Layout' on the left and a 'Help about this section' link with a question mark icon on the right.

Check the Display these salesforce.com objects session. This is the session that is needed for the record source setup. Click the Add/Remove Objects



The screenshot shows a configuration window titled 'Display these salesforce.com objects:'. At the top, there is a dropdown menu with a list of objects: 'Molly's Test Custom Object, Case, Student, Lead, Opportunity, Icon_test, lacon_test, Contact, Account'. A 'Collapse' link is visible to the right. Below the dropdown, there are two columns: 'Available' and 'Selections'. The 'Available' column lists various Salesforce objects: Account, AdminUISetting, Call History, Campaign, Customer, Custom Secret, Event, Integration App, Person Account, RingCentral Logger, SF - CustomObject - Call History, Task, teacher, and User. The 'Selections' column lists: Molly's Test Custom Object, Case, Student, Lead, Opportunity, Icon_test, lacon_test, Contact, and Account. Between the columns are 'Add' and 'Remove' buttons. To the right of the 'Selections' column are 'Up' and 'Down' arrow buttons.

All available record types are listed in the Available box. Select what was needed to the Selections box, and move Up or Down for your preferred sequence.

Display these salesforce.com objects:

▼ Case, Student, Lead, Opportunity, Icon_test, lacon_test, Contact, Account, teacher, Molly's Test Custom Object [Collapse](#)

Available		Selections
Account		Case
AdminUISetting		Student
Call History		Lead
Campaign		Opportunity
Customer		Icon_test
Custom Secret	Add	lacon_test
Event	▶	Contact
Integration App	◀	Account
Person Account	Remove	teacher
RingCentral Logger		Molly's Test Custom Object
SF - CustomObject - Call History		
Task		
User		
Yuki's CustomObject		

Up ▲
Down ▼

The selected record types will be listed on the following configuration list.

- ▶ **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 Student found, display:** Student Name, Phone [Edit](#)
If multiple matches are found, only the Student Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
- ▶ **If single Lead found, display:** Name [Edit](#)
If multiple matches are found, only the Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
- ▶ **If single Opportunity found, display:** Opportunity Name [Edit](#)
If multiple matches are found, only the Opportunity Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
- ▶ **If single Icon_test found, display:** Icon_test Name [Edit](#)
If multiple matches are found, only the Icon_test Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
- ▶ **If single lacon_test found, display:** lacon_test Name [Edit](#)
If multiple matches are found, only the lacon_test Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
- ▶ **If single Contact found, display:** Name [Edit](#)
If multiple matches are found, only the Name 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.
- ▶ **If single teacher found, display:** teacher Name [Edit](#)
If multiple matches are found, only the teacher Name is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.
- ▶ **If single Molly's Test Custom Object found, display:** Molly's CustomObject Name, M_describe [Edit](#)
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.

There are many fields in an object. For most of the Salesforce standard objects, the Softphone Layout will usually automatically pick the object's "Name" related field as the primary field to show on the search result. Admin is also allowed to selected other needed fields as primary. But for Custom Objects, Admin will need to select carefully for the primary field to show in the app.

The Primary field is the first field that was selected in the Selections box. The field value will be shown when there's a match to the phone number of the record in the CTI.

When all is done, click the Save button.

▼ If single Case found, display: Subject, Case Number Collapse

Available		Selections
Web Name		Subject
Web Email		Case Number
Web Phone		
Web Company		
Type		
Status	Add	Up
Case Reason	▶	▲
Case Origin	◀	▼
Priority	Remove	Down
Description		
Date/Time Closed		
Escalated		
Closed When Created		
Date/Time Opened		

If multiple matches are found, only the Case Number is displayed in Salesforce Classic. In Lightning Experience, all the selected fields are displayed.

Admin can set up multiple softphone layouts and assign them to different groups. In this way, groups will get different Salesforce record sources in the CTI.

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.

Associate Call/SMS Log with Person Account

The Person Account is a record type in Salesforce that can be treated as a WhoID type or a WhatID type. That means the Person Account records could be selected in either the Name or the Related to field.

Associate Call/SMS Log with Person Account

Associate call/SMS log with Person Accounts using field.

This setting is to select the field that allows the Person Account records to be selected when logging calls to Salesforce.

Autofill Related-To in Call Log for Click to Dial

When a user clicks to dial from a record's phone number, they might expect the record to be automatically selected in the call log.

This setting is allowing the record to be auto-selected to the call log. Including the record types that were not selected to be supported.

Autofill Related-To in Call Log for Click To Dial

Enhanced autofill "Contact Relationship" when using Click-to-dial.

* With this toggle ON, app will:

- Autofill the name field with "contact" or "lead" when using Click-to-dial.
- Autofill the entity (account, case, opportunity...etc) through which the contact was called using Click-to-dial.

Call Logging Setup

This setting group is controlling the behavior of the call logging.

Auto Save Setting

Pop matching Salesforce entity record on call

- Ringing
- Answered

This is deciding the time that the search results in Salesforce pops up.

Auto create call log on

- Ringing

RingCentral

- Answered

When this setting is ON, the clients understand this organization is automatically logging calls when the call is ringing or answered.

Auto Save Setting

Pop matching Salesforce entity record on call

Auto create call log on

When this is ON, the Auto log calls setting is turned ON and not able to be disabled.

RingCentral

RingCentral

Auto log calls

Auto log notes

Auto log SMS

Popup minimized app on ringing calls

Feedback >

[End User License Agreement](#)

Logout
(281) 540-0044 * 101

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Auto Create SMS log

This setting gives the admin a flexibility to enable auto log SMS feature for all the users of their org. And if this toggle is turned ON for an org then all the end users will have the auto log SMS toggle enabled automatically and locked so that they can't disable it. By default this admin setting will be turned OFF.

Cloud Phone Settings

Auto Save Setting

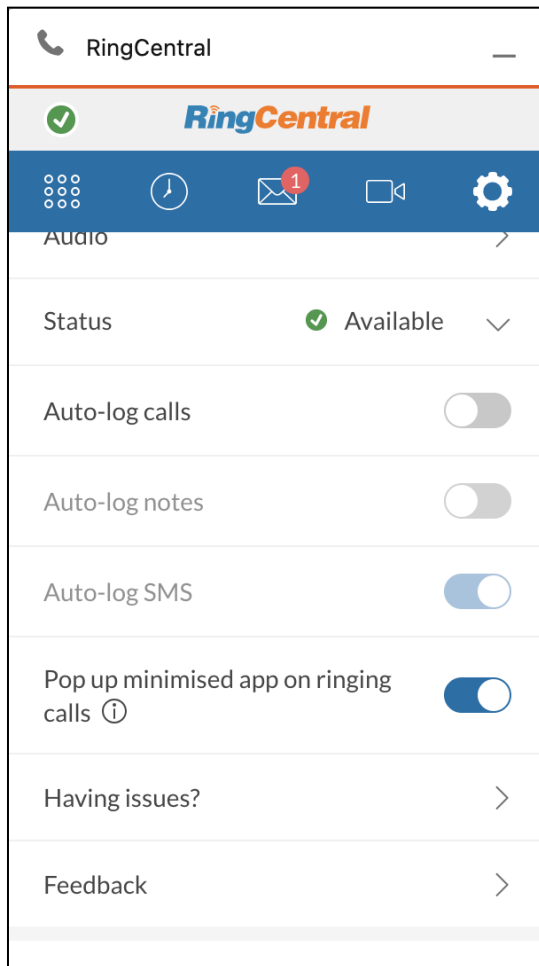
Pop matching Salesforce entity record on call

Auto create call log on

Delay auto call logging for

Auto create SMS log

If this is ON, then the Auto-log SMS setting in the CTI is turned ON and disabled.



Call Disposition Setup

This is the example of using the Subject type as the call disposition field (many users use it this way). If the admin wants to use another field for the purpose, they could always build one with a similar setup.

Navigate to Setup → Object Manager → Task → Fields & Relationships → Subject

SETUP > OBJECT MANAGER

Task

Task Field **Subject** [Help for this Page](#)

[Back to Task Fields](#)

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	Subject	Field Name	Subject
Data Type	Picklist		
Help Text			
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Picklist Values Used

Active picklist values	5 (1,000 max)
Inactive picklist values	0

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

Task Subject Picklist Values [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Task Subject Picklist Values Help](#)

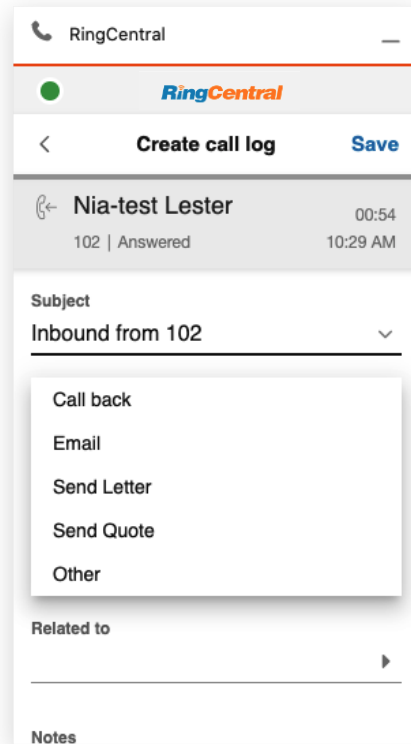
Action	Values	API Name	Default	Modified By
Edit Del Deactivate	Call back	Call_back	<input type="checkbox"/>	Michael Jason, 7/7/2021 11:41 PM
Edit Del Deactivate	Email	Email	<input type="checkbox"/>	Michael Jason, 5/7/2018 10:28 AM
Edit Del Deactivate	Send Letter	Send Letter	<input type="checkbox"/>	Michael Jason, 5/7/2018 10:28 AM
Edit Del Deactivate	Send Quote	Send Quote	<input type="checkbox"/>	Michael Jason, 5/7/2018 10:28 AM

Salesforce had some default values for the field. The Admin can edit or add values to the field.

Task Subject Picklist Values [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Task Subject Picklist Values Help](#)

Action	Values	API Name	Default	Modified By
Edit Del Deactivate	Call back	Call_back	<input type="checkbox"/>	Michael Jason, 7/7/2021 11:41 PM
Edit Del Deactivate	Email	Email	<input type="checkbox"/>	Michael Jason, 5/7/2018 10:28 AM
Edit Del Deactivate	Send Letter	Send Letter	<input type="checkbox"/>	Michael Jason, 5/7/2018 10:28 AM
Edit Del Deactivate	Send Quote	Send Quote	<input type="checkbox"/>	Michael Jason, 5/7/2018 10:28 AM
Edit Del Deactivate	Other	Other	<input type="checkbox"/>	Michael Jason, 5/7/2018 10:28 AM

The Subject field in the client will show the values that were set for pickup.



Log Customization

The Log Customization allows users to pick fields including custom fields for the clients. The field types that were supported include

- Date,
- Picklist,
- Text,
- Text Area.

When the fields are selected and saved, all users in this organization will see the Call Log layout in the client.

Log Customization

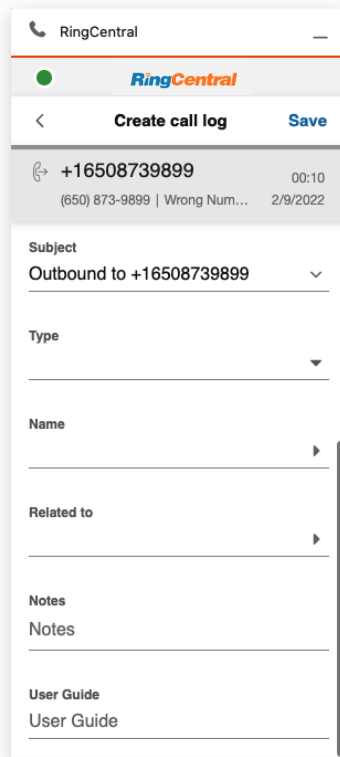
* The field types supported in call log are Date, Picklist, Text and Text Area.

Available Fields		Selected Fields	
test default hvs filed	Add	Subject	Up
M_Date	<input type="button" value="▶"/>	Name ID	<input type="button" value="▲"/>
testPickListField	Remove	Related To ID	Down
User Guide	<input type="button" value="◀"/>	Description	<input type="button" value="▼"/>
test1			
Priority *			
klay_test			

Log Customization

* The field types supported in call log are Date, Picklist, Text and Text Area.

Available Fields		Selected Fields	
Due Date Only	Add	Subject	Up
DateRequired	<input type="button" value="▶"/>	Type	<input type="button" value="▲"/>
TOTAL_CALL_TIME_HH_M	Remove	Name ID	Down
autoNumber *	<input type="button" value="◀"/>	Related To ID	<input type="button" value="▼"/>
Plist *		Description	
Text *		User Guide	
Date			



Adding Call Recording to more Task Record Layout

The RingCentral for Salesforce package creates a Task Layout containing all RingCentral custom fields while installing. So that the admin user can easily assign the layout to whoever is needed in the organization.

The custom fields include

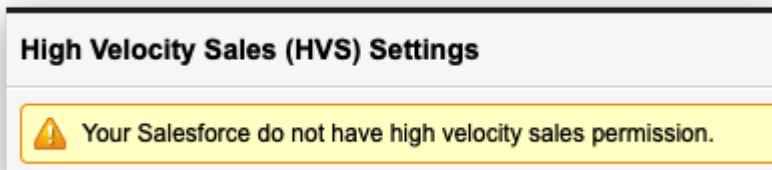
- **Call Result:** Connected, Disconnected, etc.
- **Call Duration:** the duration of the call, in Second.
- **Call Type:** Direction of the call, including Inbound and Outbound.
- **Call Recording:** if the call was recorded, the link will automatically be attached to this field after the call was ended
- **CALL_UNIQUE_ID:** the ID for the RC app to identify the call log ticket. (hidden by default)
- **CALL_UUID:** the same purpose as CALL_UNIQUE_ID, used for earlier versions. (hidden by default)
- **external_whoid:** this field is to identify personal account record that was linked in Name or Related to. (hidden by default)
- **RC Logging Type:** RC is providing logging capability of calls and SMS. This field is to identify the logging type of the record.

To add the Call Recording field to any other Task layouts, the admin can navigate to the Task page layout setting and drag the field to the layout.

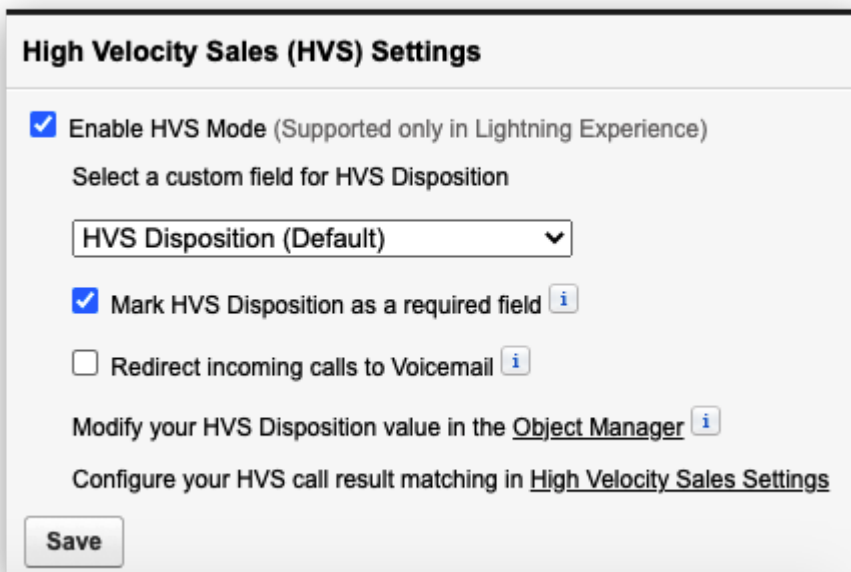
The High Velocity Sales (HVS) Support

The High Velocity Sales (HVS) is a Salesforce App that targets improving sales processes and efficiency. The RingCentral for Salesforce supports the HVS experience. Check the Salesforce help document for [the HVS setting](#).

If the Salesforce environment is not enabling HVS, the Admin UI is showing notification as below.



When the HVS is enabled in the Salesforce environment, there will be more setting options on the Admin UI.





When enabling HVS mode, the admin user can select the HVS disposition field. When a custom field is selected, the admin user will need to map the custom field values to the HVS disposition table.

Click the High Velocity Sales Settings hyperlink. Edit the Define Call Results for Branching. Put the value of the custom field to the table that maps the HVS Call Results and click Save.

3 Configure High Velocity Sales

Define Call Results for Branching RECOMMENDED Close

Sales reps select call results values, such as "Connected", when they log their calls. To display these results in reports and use them as branching criteria for sales cadences, group the values in the following categories. ✓

Call Results	Call Result Values
Displays in reports and the Sales Cadence Builder.	Enter related call result values. If you have multiple, separate each value with a comma.
Call Back Later	Call Back Later, Didn't Answer, good call, Hello
Left Voicemail	Left Voicemail, no answer, World
Meaningful Connect	Ask for Quote, Could Follow Up, Meaningful Connect
Not Interested	call later, Is, Not Interested
Unqualified	Good, Invalid Number, Unqualified

Cancel Save

The Redirect incoming calls to Voicemail option will redirect all incoming calls to the user's voicemail when there's already an active call on the client.

Salesforce Do Not Call (DNC) Support

The Do Not Call (DNC) is a hidden field in a person type record. That includes Contact, Lead, Person Account. When this field is used for flagging the contacts that the users are not supposed to contact, the admin can switch this ON.

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	SMS Settings
<input type="radio"/> Restrict calls for DNC records i	<input checked="" type="radio"/> Restrict SMS for DNC records i
<input checked="" type="radio"/> Allow override on DNC records i	<input type="radio"/> Allow override on DNC records i

The admin can decide the restriction for both Call and SMS.