Log SMS
Auto log SMS
Internal pager
Voicemail
Fax

Video
Schedule a RingCentral Video meeting
Editing RingCentral Video meetings from the RingCentral for Salesforce app
Starting a RingCentral Video meeting

Reports and Analytics
Analytics Report
Salesforce Reports
Salesforce Dashboard
Introduction

About RingCentral for Salesforce

The RingCentral for Salesforce seamlessly integrates Salesforce and your RingCentral services, so you can improve customer retention and agent productivity.

Requirements

Salesforce Edition
- Professional, Enterprise, or Unlimited

RingCentral Subscription
- MVP Premium or MVP Ultimate

Hardware Requirements (for the best Salesforce experience)
- 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 Operating System and Software Requirements
- The latest Windows (32- or 64-bit) or Mac OS
- Current version of Chrome, Firefox, Edge (Chromium), or Safari
- The latest RingCentral application (optional)
- The latest RingCentral Phone application (optional)

About this guide

This guide is specifically designed for end-users of RingCentral for Salesforce. It is not intended for system/network admins and does not provide information on how to set up the application on user desktops or how to configure Salesforce.com. This user guide will show you how to use this application and provide known issues/limitations.

This user guide for Salesforce Lightning is specifically for RingCentral for Salesforce. All previous and related guides for RingCentral for Salesforce can be accessed from the Salesforce AppExchange.
Initiating RingCentral for Salesforce

If your admin installed and configured RingCentral for Salesforce, you’ll find the RingCentral Computer Telephony Integration (CTI) within Salesforce.

This part of the guide will show you how to access and sign in to the RingCentral CTI.

Accessing RingCentral for Salesforce

RingCentral for Salesforce will create a Salesforce App called RingCentral for Lightning. You can find this app in the Salesforce App Launcher.

In some cases, admins may hide the RingCentral for Lightning from users, or may add the CTI to other apps. If this appears to be the case, ask your admin how to locate the CTI app within Salesforce.

You can find the CTI button at the bottom left on the RingCentral for Lightning page.
Click the CTI and sign in.
Signing in to RingCentral for Salesforce

Click Sign in, enter your RingCentral account, and sign in to RingCentral for Salesforce.

After logging in, you’ll see RingCentral for Salesforce in the Salesforce app.
Call settings

Call mode settings

RingCentral for Salesforce has four calling modes.
- Call with browser (Recommended)
- Call with the RingCentral App
- Call with RingCentral Phone
- RingOut

RingCentral recommends **Call with browser** mode for the best call experience.

Navigate to **Settings > Calling** to access the list of calling modes.

Requirements for each mode
- **Call with browser**: A browser that supports Web Real-Time Communications (WebRTC).
- **Call with the RingCentral App**: RingCentral App installed, and a login for a RingCentral account.
- **Call with RingCentral Phone**: RingCentral Phone installed, and a login for RingCentral account.
- **RingOut**: Another phone device with a valid phone number.
Audio settings

Audio settings are only adjustable in Call with Browser mode. To access audio settings, navigate to Settings > Audio.
In Audio Settings, you can select your audio input and output devices. If your browser blocks audio permissions, you can re-initiate the access request.

Click **Check Permission** to grant browser audio permissions.
Region setting

The **Region setting** lets you set up your current location. The app will format a seven- or eight-digit local phone number to an E.164-formatted phone number.

By default, the app follows the region settings in the current Salesforce organization. You can change the region code as needed.

For example, you can select the country code (+1) for the United States, then enter Area Code 650. When you dial the local number 539-xxxx, the app will display that it is dialing +1-650-539-xxxx.
Dialpad menu

The dialpad page is Salesforce's home page. You can make outbound calls from this window.

The **To:** field is for the phone number or contact name input. Use the dialpad to enter numbers or letters to search for your existing contacts.

You can use the **From:** field to select the direct numbers from which you make outbound calls. This is the phone number that the call recipient will see on their Caller ID display.
Call history menu

The Call history page shows calls that you've placed and received. Only the last seven days, or the last 250 calls, will be displayed.

You can find your Call log status and options to Call back, Send SMS, and Add/View contact.

When the phone number of an inbound call matches a Salesforce record, the Add/View contact button will open the Salesforce record detail page.

When a phone number does not match a Salesforce record, you can create a new record in Salesforce.
Outbound calls

RingCentral for Salesforce supports multiple methods for making outbound calls.

Click-to-Dial

When you sign in to the Salesforce for RingCentral, the phone numbers turn into clickable hyperlinks. You can click a number to call that phone with the RingCentral for Salesforce app.

If your admin turned on the **Autofill Related-To in Call Log for Click To Dial** option, the selected Salesforce record will be moved to the Call log page.
Callback from history

You can also call a number from your Call history or SMS history by clicking the callback or phone button.
Call from dialpad

To make outbound calls from the dialpad, you can simply click the numbers, or you can enter numbers or letters in the To field to find numbers from your Salesforce records.

The menu bar near the top of the panel lets you navigate between your Salesforce, Company, or Personal contacts.

Note: Your admin will determine which Salesforce record types appear in dialpad searches.
Inbound calls

In **Call with Browser** mode, you can answer inbound calls within the RingCentral for Salesforce app.

If there is an incoming call, the app will open its call log and control page.

If the incoming call matches any linked directory sources (including Company Directory, Salesforce Records, and Personal Contacts), the app will display the caller’s info.

On the call log and control page, you can:
- Forward the call to another number
- Ignore the call
- Forward the call to voicemail and reject the call
- Answer the call

If there's already a call log page in the foreground, you will see a notification when a new call comes in. Otherwise, calls will stay on the call log page as a notification.
Call controls

Inbound call control

- **Ignore**: The inbound call will be ignored. The caller hears the call ringing without being answered. The CTI will stop this call’s ringing for the end-user.

- **Forward**: The inbound call will be forwarded to a pre-set or custom phone number. When the call is forwarded, the CTI will stop this call’s ringing for the end-user.

- **To Voicemail**: The inbound call will be sent to voicemail. When the call is sent to voicemail, the CTI will stop this call’s ringing for the end-user.

- **Answer**: You choose to answer the inbound call. The call status will change from *ringing* to *connected*. The call log and control page will open automatically.
Connected call control

When a call is connected, you'll find these call controls on the call log and control page.

- **Mute**: Mute the voice input of the CTI. You can still hear the voice of the other party on the call. Click to switch between *Mute* and *Unmute* statuses.

- **Hold**: Switch the status of the call between *Hold* and *Unhold*. While the call is on hold, neither party can hear or speak to the other. The telephony system will play hold music. The call information session on the call log and control page will turn orange as a status notification.

- **Record**: Switch the recording status between *Recording* and *Not recording*. Each time the recording is initiated, the telephony system will play the recording notification audio. If there are several recordings in a call, all recordings will be merged into a single recording. Your admin can set up a mandatory recording for all calls. In this case, you can’t switch the recording status. When a call is being recorded, the CTI will show a status notification for the call.

- **Dialpad**: When you need to enter Dual Tone Multi-Frequency (DTMF) tones during a call, open the dialpad for more actions.
- **Transfer**: RingCentral supports three different transfer types. You can transfer the call to a Company Directory record, a Personal Contact record, or a Salesforce record.
  - **Cold Transfer**: Enter a phone number or select a contact, then click **Complete Transfer** to transfer the call.
  - **Transfer to Voicemail**: Transfer a call to an extension's Voicemail. Note that only internal extensions are supported.
  - **Warm transfer**: Click the **Ask first** button to initiate a warm transfer. The original call will be placed on hold, and a new call to the transferee will be initiated. To complete the transfer, click **Complete Transfer**.
Multiple calls control

You can control multiple calls in a single interface in the app. To open the All Calls page, click the back button on the call log and control page, or the View button on the header.

All calls will be listed on the All Calls page, and you can click to switch between them.
Call control in multiple tabs

RingCentral for Salesforce ensures good call connections and audio quality even when you have multiple tabs open.

When calls have been connected in multiple tabs, the audio connection will always be merged to the most recent call. You can switch between calls by clicking the Switch Call button. Learn more about the Call Switch Feature.
Transferring a call

When you transfer a call in the RingCentral for Salesforce app, you can perform a warm transfer, or you can transfer the call to an extension’s voicemail.

Warm-transferring a call

In a warm transfer, you speak with the person on the other extension before transferring the call.

1. During an active call, click the three-dot More icon at the bottom of the app, then click Transfer.

2. Enter the name or extension number of the person you want to transfer the call to, then select it. Click Ask first. The first call will be placed on hold and the second call will become the active call.
3. Speak with the person when they answer the call.
4. Click the Swap button to switch between calls, as necessary.
5. When you’re ready to transfer the call, click Complete transfer.
Transferring a call to voicemail

When you try to transfer a call but the extension is busy, you can send it to the extension's voicemail.

1. During an active call, click the three-dot More icon at the bottom of the app, then click Transfer.
2. Enter the name or extension number of the person you want to transfer the call to, then select it.
3. Click To voicemail. The customer is then transferred to the voicemail prompt. Call transferred will appear, and the call automatically disconnects on your end.
Call logging

On the Call logging and control page, you can log a call to Salesforce during an active call, or you can log it later, from the call history list.

Logging a call

To log a call during an active call, click the Call log button and enter the Subject, Type, Name, Related to, Notes, Priority, Type, and User Guide fields.
To log or update a previous call, go to the **History** tab and click the **Call Log** button next to the call you want to log.

Your organization's admin chooses from the following list which call log fields are active: **Missed, Connected, Disconnected, Hung up, or Wrong number.**
Viewing call logs

View the call log in Salesforce by clicking the Call log button next to the call you want to view from the History tab.

The Call log button shows your call logging status.

- A red icon indicates that the call has not been logged yet.
- A green icon indicates that the call has been logged.
Auto log calls

When an admin enables an Auto Log calls strategy in Admin Settings, the Auto log calls setting will be set to ON, and manual call logging will be disabled for the end-user.

If your admin has not enabled Auto Log, you can toggle the ON/OFF setting.

When this setting is ON, the app will auto-create call logs for active calls that are matched to the Salesforce record.

The call log may be created when the call is ringing or when it is answered, depending on the admin setting.
Auto log notes

The Auto log notes setting is only available when Auto log calls is set to ON.

When the Auto log notes setting is ON, all edits to the app's call log page will automatically update to the call log record in Salesforce.
Calls on other devices

If your RingCentral for Salesforce account is in another call on another device, the app will show all calls under the same account, so you can log your calls on any device.

Click on a call item to start logging a call.

RingCentral for Salesforce offers limited call control for calls made on other devices. You can:

- Mute/Unmute
- Transfer
- Hold/Unhold
- End the call
Message menu

RingCentral for Salesforce offers Fax, Voicemail, and SMS (text message) services. You can view your message list by clicking on the envelope icon.

From the Message menu, you can access all message types, listen to voicemails, read incoming faxes, and send and receive SMS messages.
SMS (text messages)

Composing an SMS

Click the plus button to compose an SMS. You can send messages to contacts in your directory, or directly to another user’s number.
You can send an SMS to multiple recipients. When an SMS is sent to multiple addresses, the message will be broken into individual conversations with each recipient.
SMS conversation

When you send or receive an SMS, it creates a conversation. All new sent or received SMS messages from the same phone number will automatically be merged into the conversation.

Log SMS

To log SMS conversations into Salesforce, click the Name or Related to dropdown. All Salesforce records that match the phone number will appear.
Select a matching record and click the Log button.
Auto log SMS

When the **Auto log SMS** feature is ON, the app will automatically update Salesforce log records when a conversation is updated.

Internal pager

RingCentral for Salesforce lets you use internal pager functions such as peer-to-peer paging and group paging.
Voicemail

You can use RingCentral for Salesforce to listen to or download voicemail messages, reply to the voicemail with a call or an SMS, or delete the voicemail.

Fax

You can use RingCentral for Salesforce to read, download, or delete faxes.
Video

Schedule a RingCentral Video meeting

RingCentral for Salesforce gives you access to the full array of RingCentral Video settings. Learn more about RingCentral Video.

Click Schedule Video Meeting to schedule a RingCentral Video meeting from within Salesforce.
You can also schedule a meeting using the Global Actions button at the upper right of RingCentral for Salesforce.

Note: Your admin should configure your organization's Global Action settings.

Click the **Global Actions** button at the upper right and select **Schedule RingCentral Video meeting**.

The schedule meeting window will appear. Fill out the necessary fields and click **Schedule**.
Editing RingCentral Video meetings from the RingCentral for Salesforce app

You can edit scheduled RingCentral Video meetings via the Calendar tab in RingCentral for Salesforce. Select the scheduled meeting from your calendar and edit the fields as needed.
Starting a RingCentral Video meeting

RingCentral for Salesforce can initiate a RingCentral Video meeting. From the **Global Actions** dropdown, select **Start RingCentral Video meeting**. The RingCentral Video popup window will appear. Click **Start meeting**.
Reports and Analytics

Analytics Report

RingCentral for Salesforce provides Analytics Reporting so you can view your calls data. From the RingCentral CTI, go to Settings > Analytics Report.

This will open your Analytics Report.
Salesforce Reports

RingCentral for Salesforce provides Salesforce reports, including My Calls Today and My SMS Today reports.

You can access the My Calls Today report from the dialpad and Call history pages.
Salesforce Dashboard

RingCentral for Salesforce creates a basic Salesforce dashboard, where you can view a summary of your calls. If you have the correct Salesforce permissions, you will see the Dashboard tab in your tabs menu.