

RingCentral for MINDBODY

User Guide

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Introduction

About RingCentral for MINDBODY

RingCentral provides a complete cloud business communications solution designed for MINDBODY's mobile and dispersed employees, offering a next-generation alternative to legacy, tethered phone systems.

RingCentral helps their employees stay connected to customers and colleagues, enabling them to use a variety of business and personal devices, including smartphones, tablets, computers and desk phones.

About MINDBODY

MINDBODY is the leading provider of cloud-based business management software for the wellness services industry, with over 45,000 local business subscribers in 132 countries and territories. By implementing RingCentral Office, MINDBODY diminished connectivity issues, inefficiency, and extra costs from using several legacy PBX vendors across their global offices in the United States, United Kingdom, and Australia.

RingCentral helps unify communications for MINDBODY's team and provides a feature rich, mobile-centric solution that is simple to activate, manage, and scale as their company grows.

Learn more about MINDBODY [here](#); download the MINDBODY app [here](#).

About this Guide

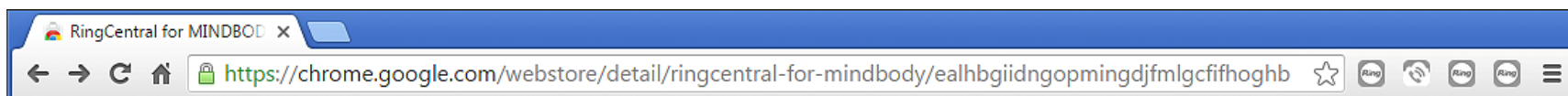
This guide is designed for users of the RingCentral for MINDBODY app. It shows how to download and login to the MINDBODY app, find the RingCentral for MINDBODY Chrome Extension, and how to:

- view calls and add a client,
- act on incoming calls,
- add a contact log,
- send an SMS,
- view and reply to messages,
- view contact details,
- view and reply to conversations,
- log conversations and calls,
- view call details, and
- configure settings.

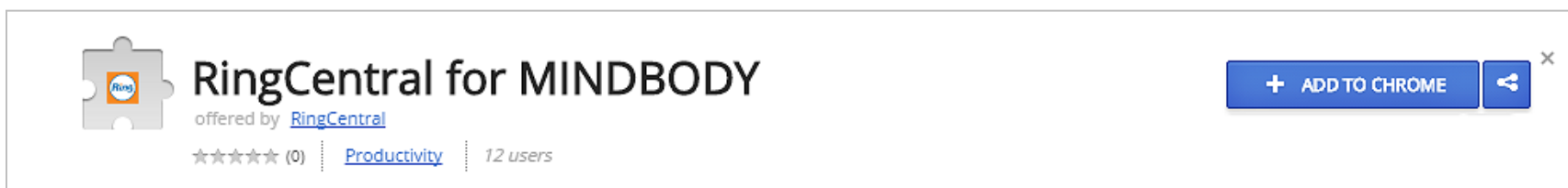
Getting Started with MINDBODY

Before You Begin

- Get the **RingCentral for MINDBODY** Chrome Extension from the [Google Chrome Web Store](https://chrome.google.com/webstore/detail/ringcentral-for-mindbody/ealhbgjiidngopmingdjfmlgcfifhoghb).



- Click the + **ADD TO CHROME** button.



- If your wellness business has multiple RingCentral phones, make sure you log in with the RingCentral credential that's specific to the phone where you want to pick up the call.

Open Your MINDBODY Account

Open up your MINDBODY account in Google Chrome. (Figure 1)

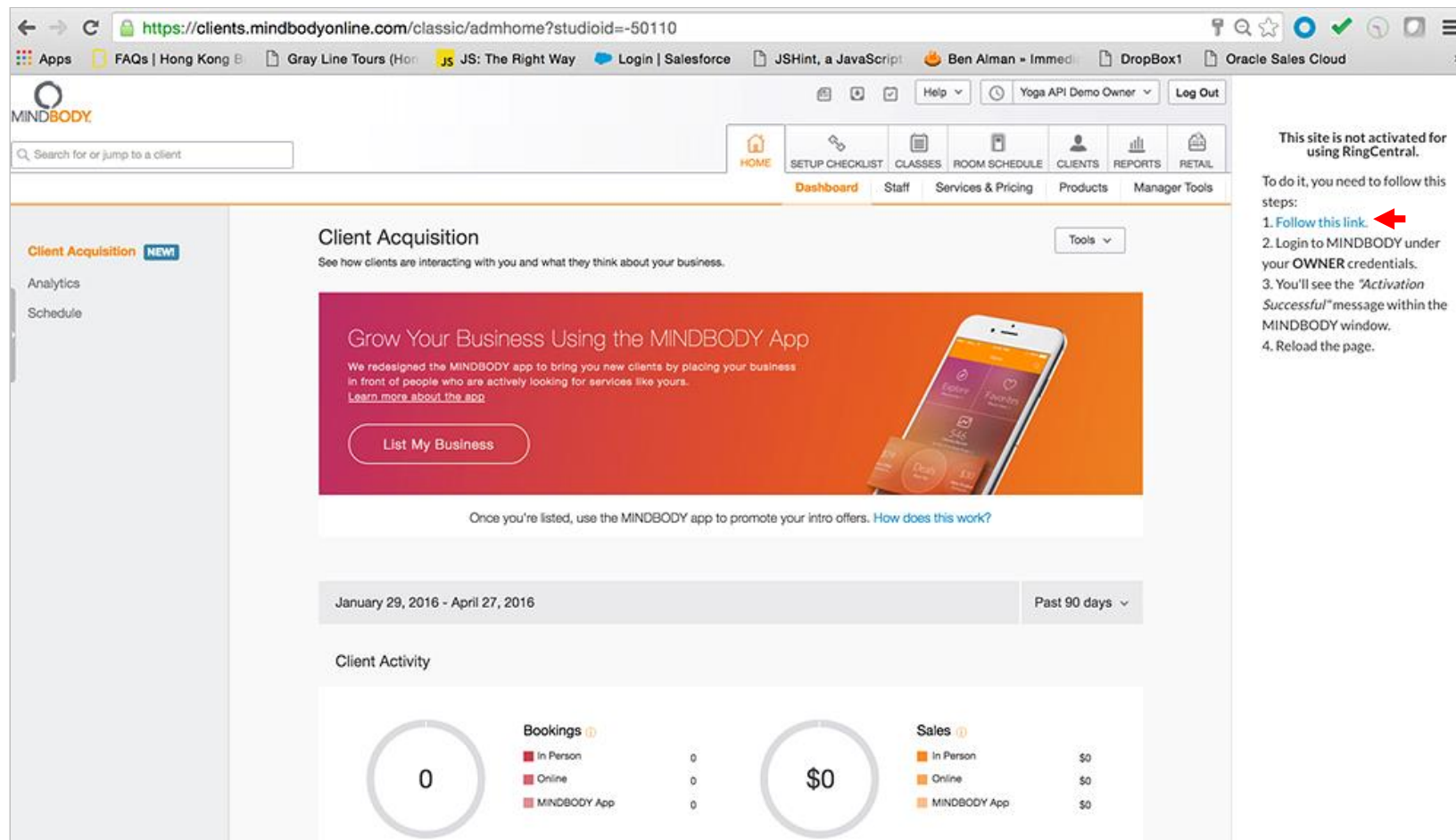
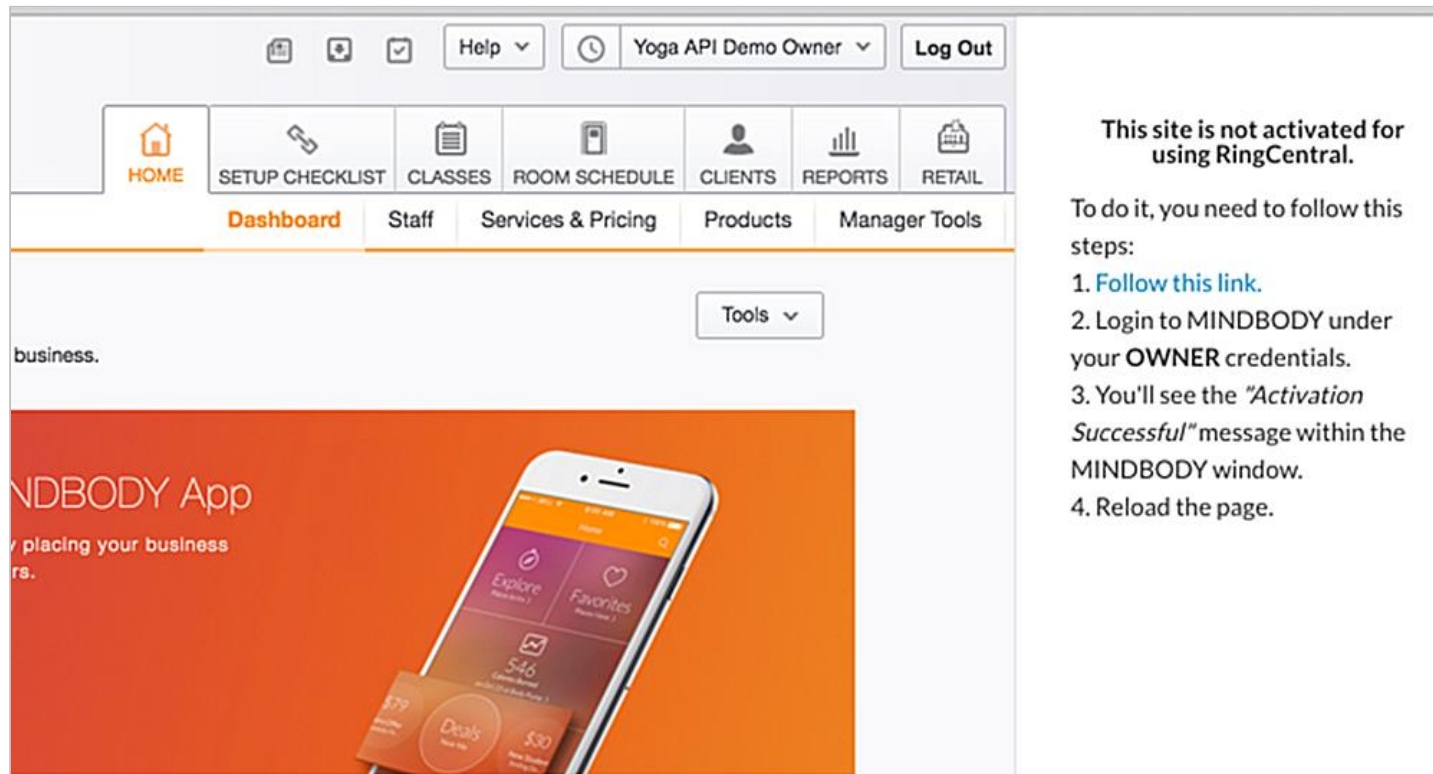


Figure 1—MINDBODY Account Opened in Google Chrome

Notice when you go to the MINDBODY URL, RingCentral for MINDBODY automatically opens up on the right-hand side. If you are the first user in your company to install RingCentral for MINDBODY, then a one-time API activation step is required to be able to use the MINDBODY app (described in the next section). This API activation step can be completed only by the MINDBODY account owner in your company. The MINDBODY account owner also must install the RingCentral Chrome Extension the same way, and click [Follow this link](#) to open the MINDBODY URL.

Verify RingCentral API Activation

Log in to MINDBODY as owner, and navigate to **Home > Manager Tools**. (Figure 2)



The screenshot displays the MINDBODY Manager Tools interface. At the top, there is a navigation bar with icons for Home, Setup Checklist, Classes, Room Schedule, Clients, Reports, and Retail. Below this is a secondary navigation bar with links for Dashboard, Staff, Services & Pricing, Products, and Manager Tools. The Manager Tools section is currently selected. A notification banner on the right side of the page states: "This site is not activated for using RingCentral." Below this notification, a list of steps is provided: 1. Follow this link. 2. Login to MINDBODY under your OWNER credentials. 3. You'll see the "Activation Successful" message within the MINDBODY window. 4. Reload the page. The main content area on the left shows a promotional banner for the MINDBODY App, featuring a smartphone displaying the app's interface with sections for Explore, Favorites, and Deals.

This site is not activated for using RingCentral.

To do it, you need to follow this steps:

1. [Follow this link.](#)
2. Login to MINDBODY under your **OWNER** credentials.
3. You'll see the "Activation Successful" message within the MINDBODY window.
4. Reload the page.

Figure 2—Verify RingCentral API Activation

From **Manager Tools**, click **API Integrations**. (Figure 3) You should see that RingCentral has access to the MINDBODY API. (Figure 4)

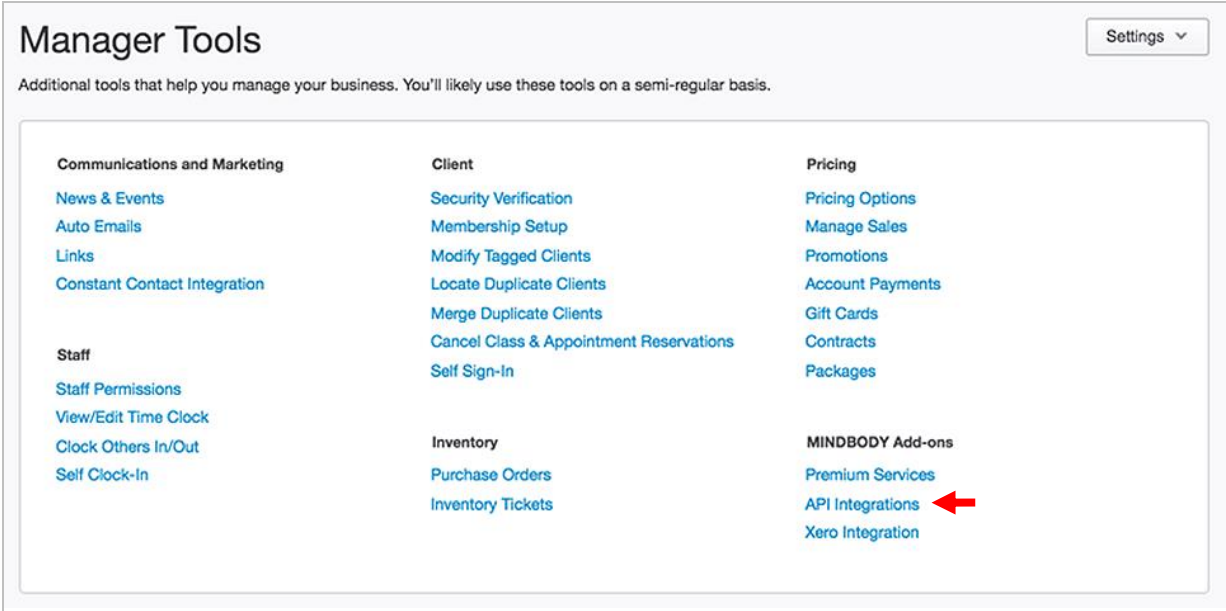


Figure 3—Manager Tools

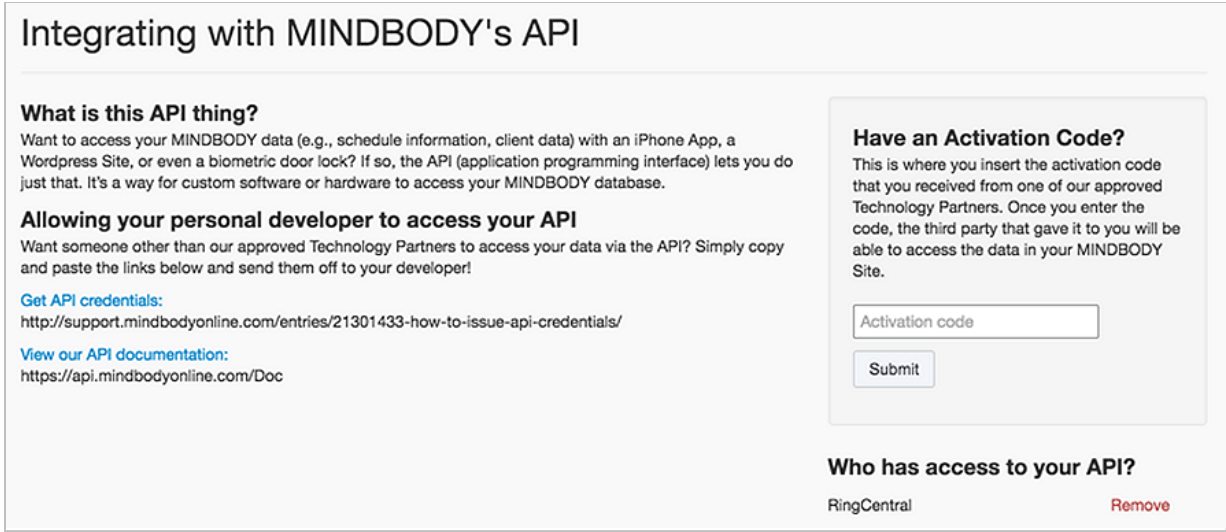
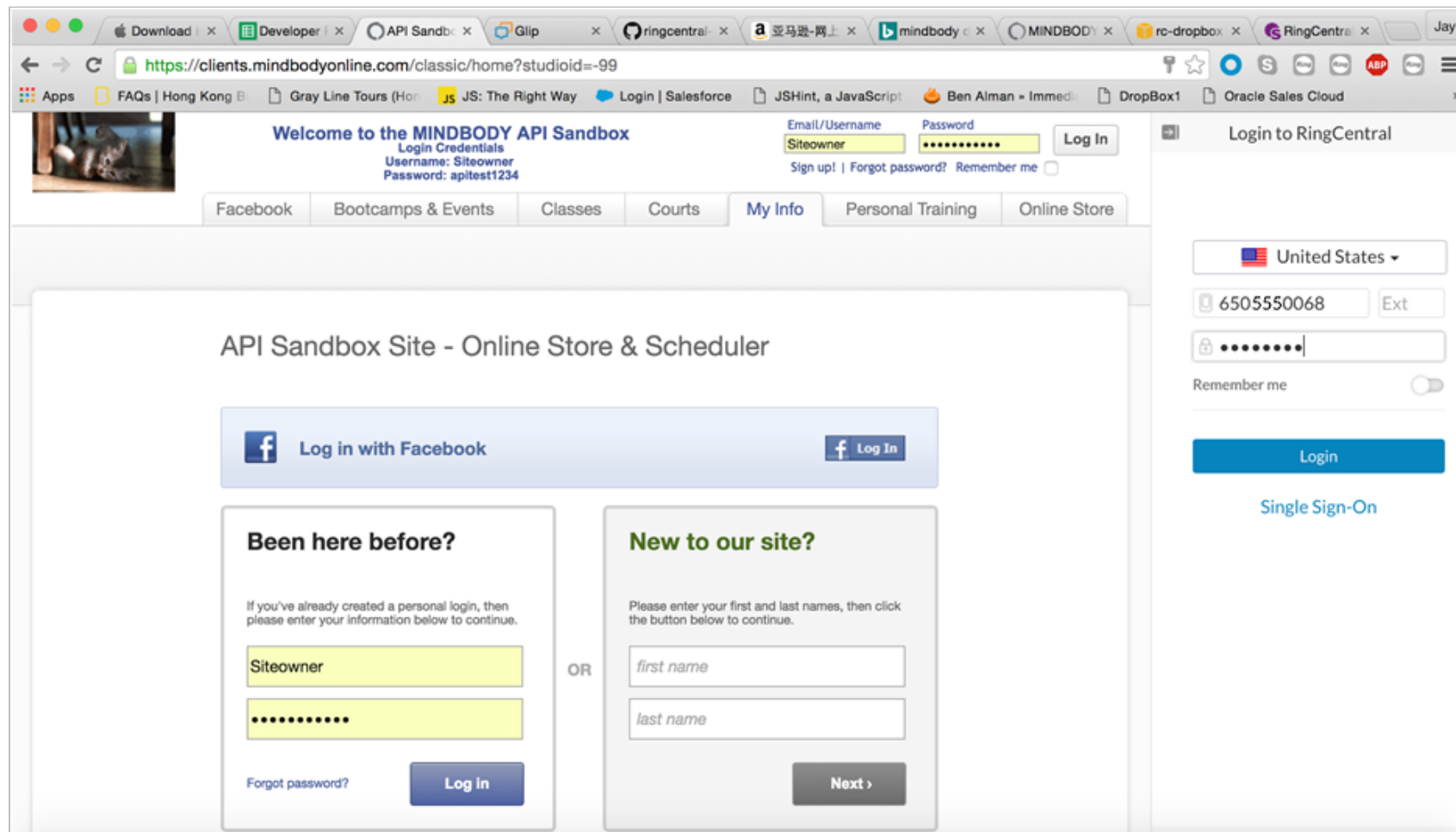


Figure 4—Access to MINDBODY API

Log in to Your MINDBODY and RingCentral Accounts

Log in to your MINDBODY account on the left-hand pane, and into to your RingCentral account on the right-hand pane. (Figure 5)



The screenshot shows a web browser with multiple tabs. The active tab is the MINDBODY API Sandbox login page. The page has a header with a welcome message and login credentials (Username: Siteowner, Password: apitest1234). Below the header is a navigation bar with links to Facebook, Bootcamps & Events, Classes, Courts, My Info, Personal Training, and Online Store. The main content area is titled "API Sandbox Site - Online Store & Scheduler" and contains two login options: "Log in with Facebook" and "Log in" (with a Facebook icon). Below these are two sections: "Been here before?" and "New to our site?". The "Been here before?" section has a "Siteowner" field and a password field, with a "Forgot password?" link and a "Log in" button. The "New to our site?" section has "first name" and "last name" fields, with a "Next >" button. To the right of the MINDBODY page is the RingCentral login page, which has a "Login to RingCentral" header, a "United States" dropdown, a phone number field (6505550068), a password field, a "Remember me" checkbox, and a "Login" button. Below the "Login" button is a "Single Sign-On" link.

Figure 5—Log in to Your MINDBODY Account and Your RingCentral Account

You are required to log in to MINDBODY again in the RingCentral app. MINDBODY does not allow third-party applications such as RingCentral for MINDBODY to automatically integrate on behalf of the user and use MINDBODY data in the application; rather, a manual login is required every time. (Figure 6)

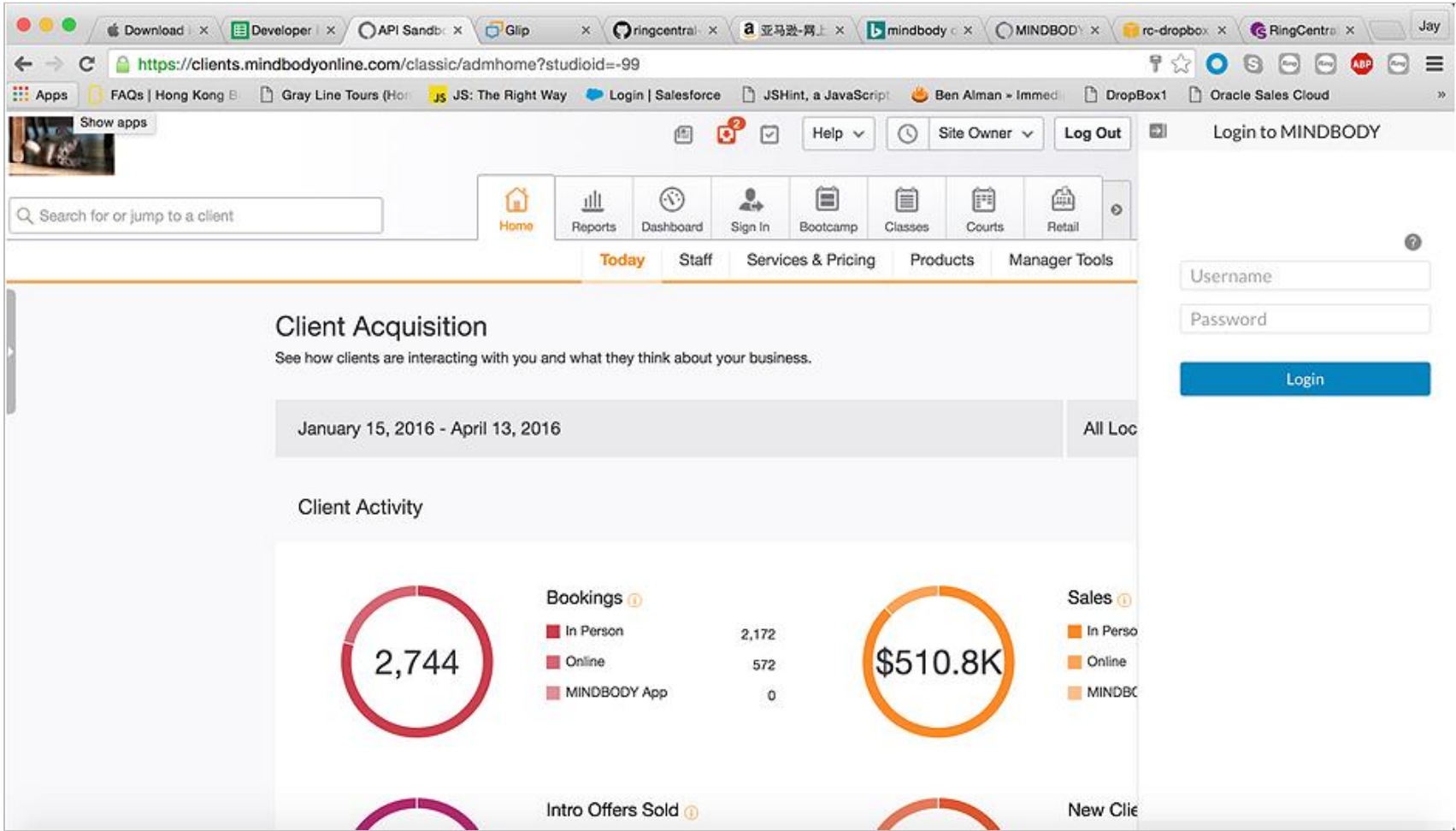


Figure 6—Login to MINDBODY for Client Acquisition

After all the logins you will see the RingCentral for the MINDBODY app is ready to use. (Figure 7)

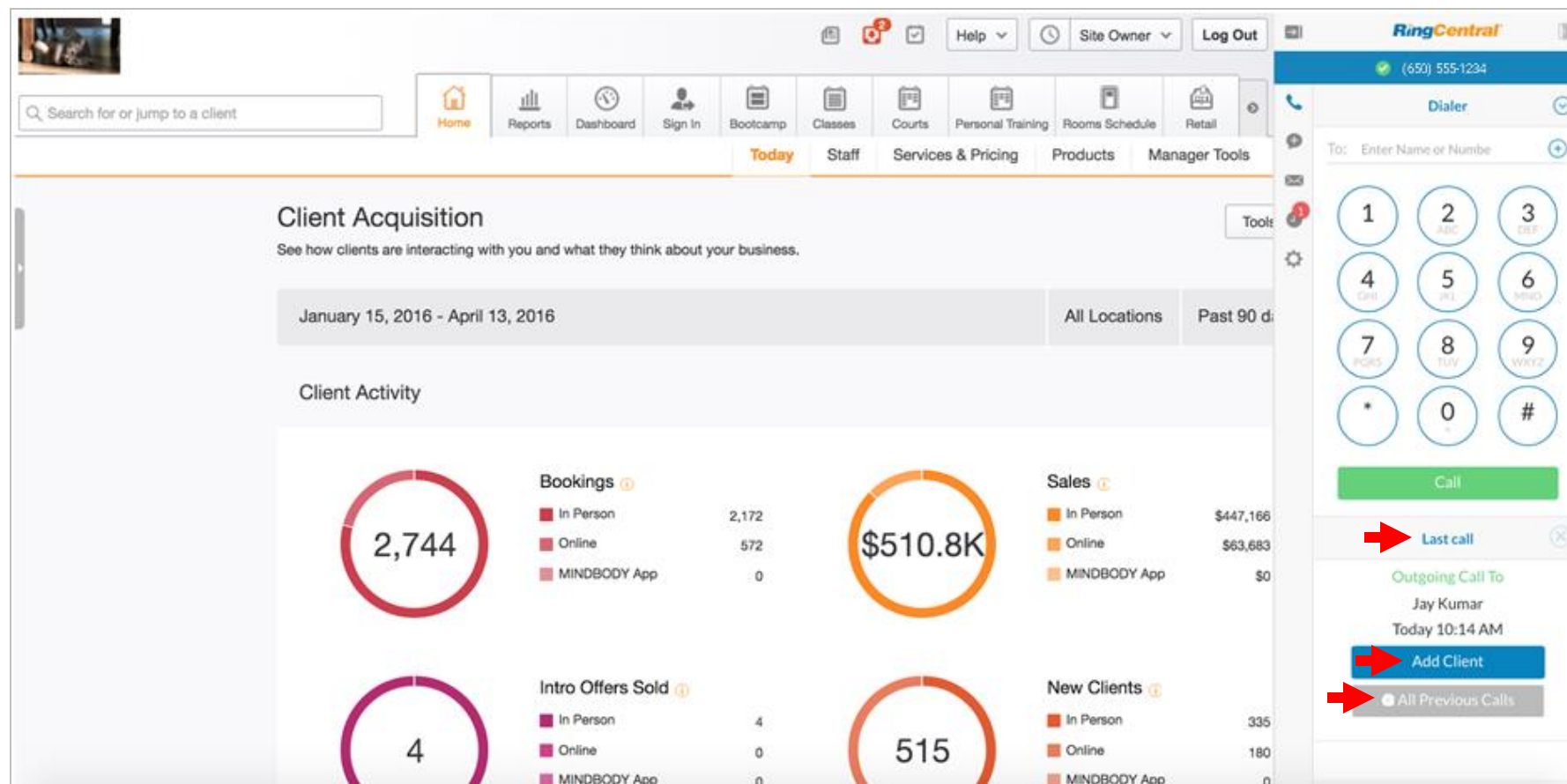


Figure 7—RingCentral for MINDBODY Ready to Use

- **Last Call**—The last call section displays the latest call information. A last call section is always available and is replaced with the most recent call you made to your client.
- **Add Client**—A new caller can be added as a client to MINDBODY. We will discuss more about Add Client feature in a later section.
- **All Previous Calls**—Displays a list of all calls made or received from the client or caller/callee.

Incoming Call

When you receive a call, the app will notify you, and you can answer or reject the call. (Figure 8)

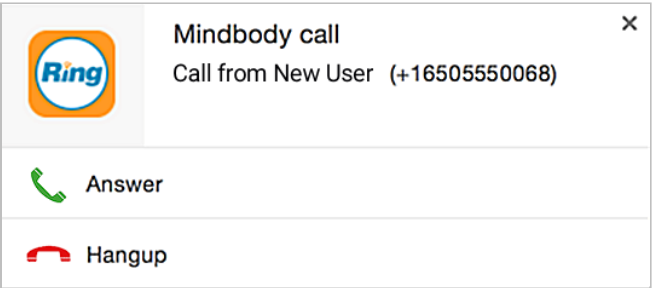


Figure 8—Incoming Call Notification

As you receive an incoming call, you will see the app interface change to allow you to take action on the call and related information. (Figure 9)

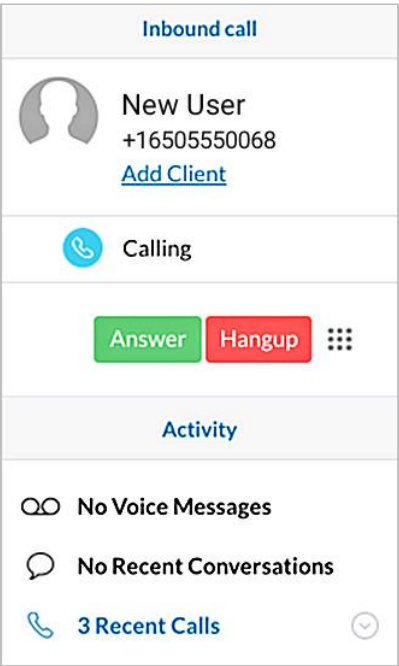


Figure 9—Inbound Call Interface

You choose to take the call by clicking the **Answer** button or **Hangup** button to send the caller to voicemail. (Figure 6 above)

When you use the app for the first time, Google Chrome will ask for your consent to allow RingCentral for MINDBODY app to be able to use the microphone on your computer. (Figure 10)

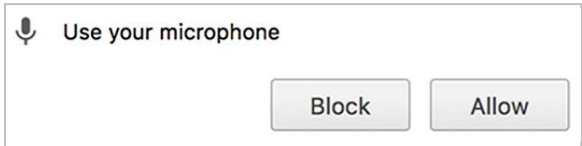
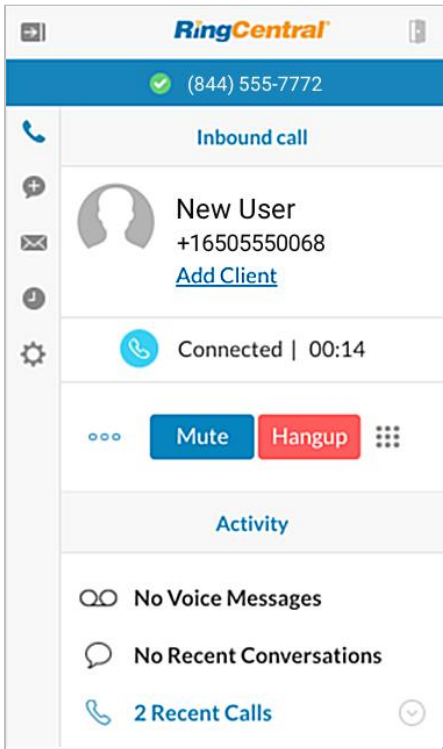


Figure 10—Allow Google Chrome to Use Your Computer Microphone

After you accept the the call, the interface changes again, as shown in Figure 11 below. You will be able to hear your caller through you computer speaker and they will be able to hear you via your computer’s microphone.



- **Mute**—Mutes your microphone; you can still hear the caller’s voice from the speaker.
- **Hangup**—This button ends the call.
- **Dial pad**—Brings up the dialer. The dialer is useful for entering options for IVR calls; for example, “Press 1 for customer service”.
- **Additional Actions**—The three dots icon can be clicked to take additional actions on an active call. Examples: **Transfer**, **Flip**, **Record**, or **Hold** a call.

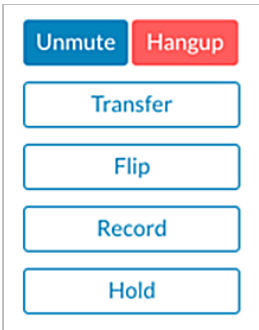
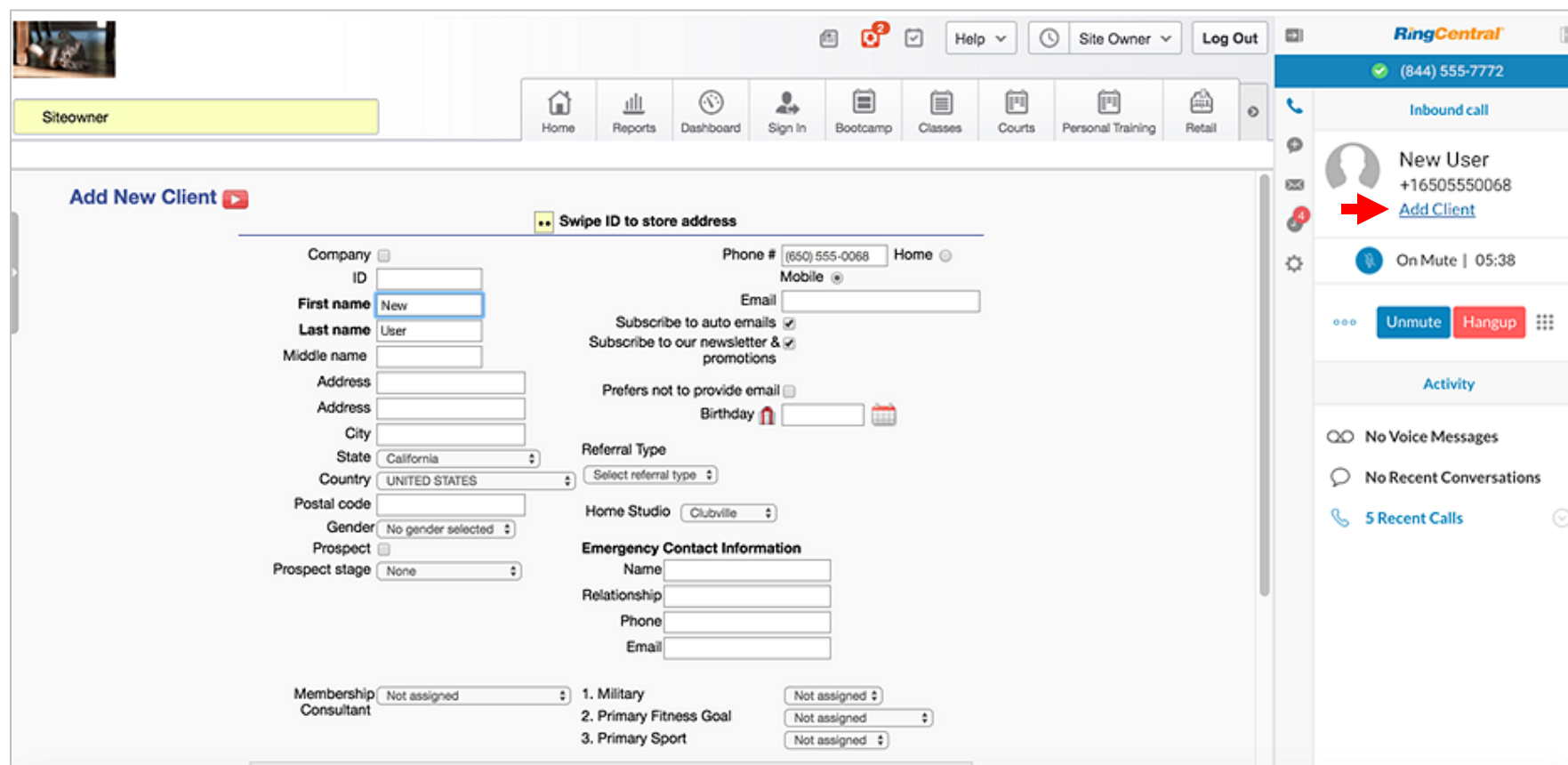


Figure 11—Interface for Responding to Accepted Calls

Add a Client

If the caller is not already in your MINDBODY account, an **Add Client** link will appear. Clicking that link brings up the **Add New Client** screen in MINDBODY. This functionality allows you to quickly add a new client at the same time you are on phone with the client. The new client's phone number, and first name and last name are filed in automatically. (Figure 12)



Add New Client

Swipe ID to store address

Company ID

First name

Last name

Middle name

Address

City

State

Country

Postal code

Gender

Prospect ☐

Prospect stage

Phone # Home ☐

Mobile ☐

Email

Subscribe to auto emails ☒

Subscribe to our newsletter & promotions ☒

Prefers not to provide email ☐

Birthdate

Referral Type

Home Studio

Emergency Contact Information

Name

Relationship

Phone

Email

Membership Consultant

1. Military

2. Primary Fitness Goal

3. Primary Sport

RingCentral

(844) 555-7772

Inbound call

New User
+16505550068
[Add Client](#)

On Mute | 05:38

Unmute Hangup

Activity

No Voice Messages

No Recent Conversations

5 Recent Calls

Figure 12—Add New Client Screen

As soon you hit **Save** on MINDBODY, the **Add Client** screen on the RingCentral app changes the caller icon to show the MINDBODY profile icon of the client, as shown in Figure 13 below. You can also select **Add Contact Log** for this new client. We will discuss adding a contact log in a following section.

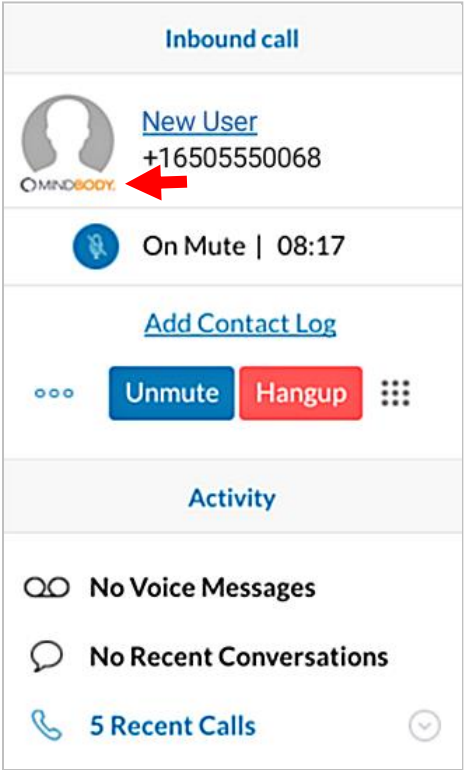


Figure 13—Add Client Icon Change

Incoming Call from Known Client

The incoming call will show the MINDBODY icon. This icon indicates that the caller is an existing client. Clicking the caller name takes you to the MINDBODY profile for that client. You can select **Answer** or **Hangup**. (Figure 14)

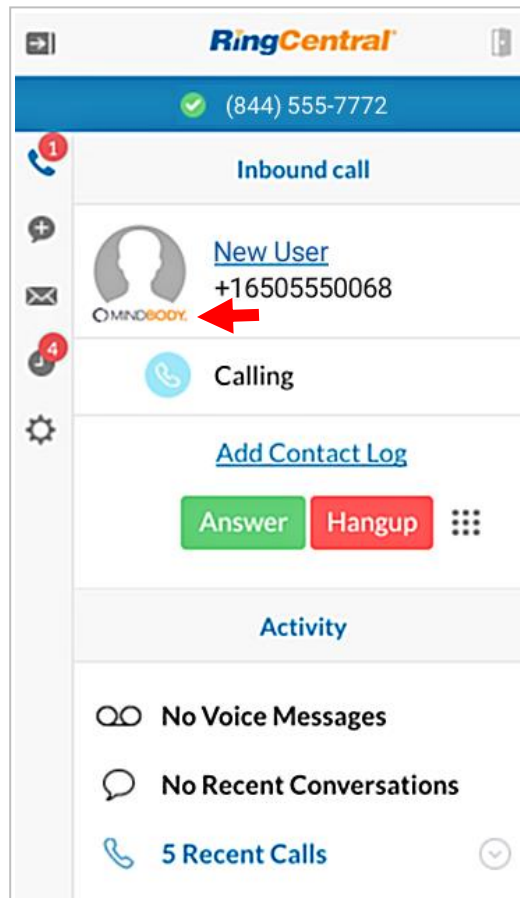
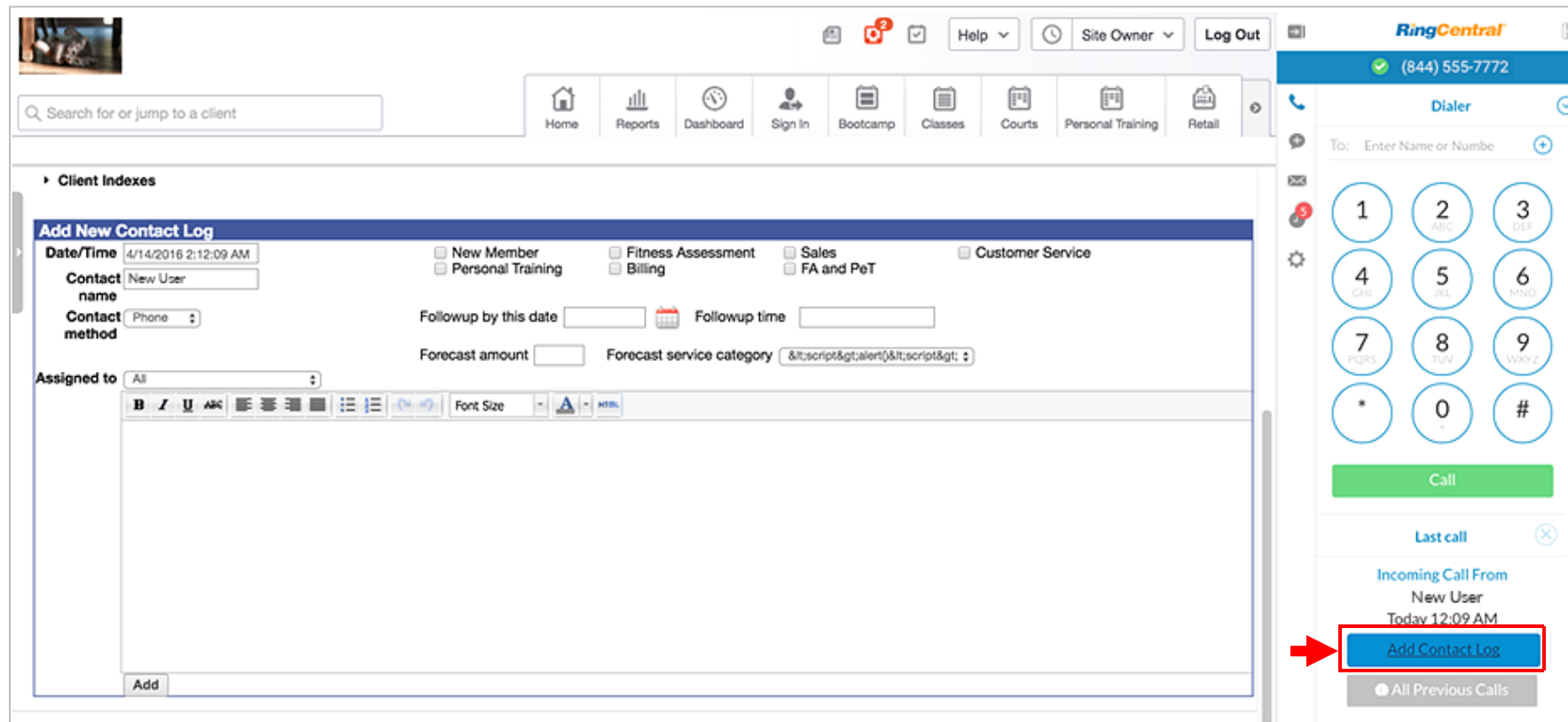


Figure 14—Incoming Call from Known Client

Add Contact Log

When you click the **Add Contact Log** link from **Last Call**, or during an active call, the system brings up the **Add New Contact Log** screen. (Figure 15)



The screenshot displays the 'Add New Contact Log' screen within the RingCentral for MINDBODY interface. The main content area contains a form with the following fields and options:

- Date/Time:** 4/14/2016 2:12:09 AM
- Contact name:** New User
- Contact method:** Phone
- Assigned to:** All
- Followup by this date:** [Calendar icon]
- Followup time:** [Time input field]
- Forecast amount:** [Amount input field]
- Forecast service category:** [Dropdown menu]

Checkboxes for service categories are located at the top right of the form:

- ☐ New Member
- ☐ Personal Training
- ☐ Fitness Assessment
- ☐ Billing
- ☐ Sales
- ☐ FA and PeT
- ☐ Customer Service

The right sidebar shows the 'Last call' section with an 'Add Contact Log' button highlighted by a red arrow. Below this button is a link for 'All Previous Calls'.

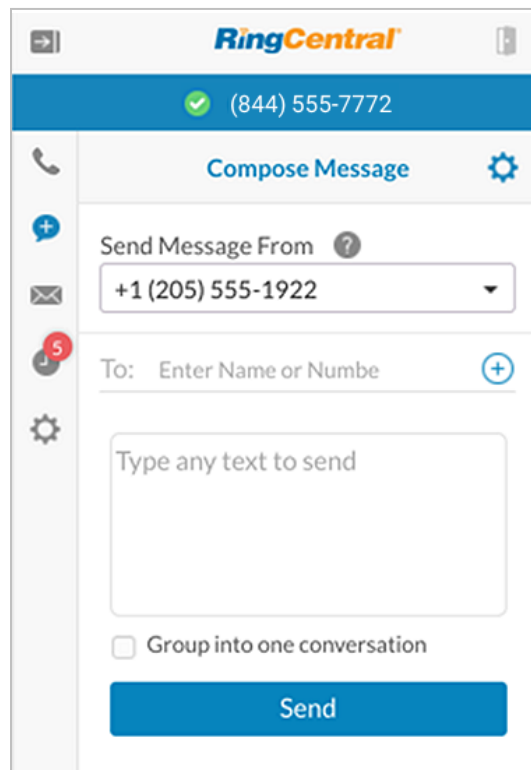
Figure 15—Add New Contact Log Screen

Send SMS

The **Send SMS** screen will allow you send an SMS to a phone number of your choice. You can type in a phone number or some text. When you type in some text, the app tries to find a matching contact in your RingCentral account. You can also bring up the contact search screen by clicking the “+” icon.

You can see a list of phone numbers that you are allowed to send an SMS from. The SMS recipient will see this number as the number from which the SMS came. This number should usually be your RingCentral number, but you may be authorized to send text from multiple phone numbers depending upon your RingCentral account.

When you send an SMS to multiple persons, you can view the message as a group conversation, as shown in Figure 16 below. (See **Messages** below.)



The screenshot shows the 'Compose Message' interface in the RingCentral app. At the top, there's a status bar with the RingCentral logo and a green checkmark next to the phone number (844) 555-7772. Below this is a 'Compose Message' header with a gear icon. The main area contains a 'Send Message From' dropdown menu with the selected number +1 (205) 555-1922. Below that is a 'To:' field with the placeholder text 'Enter Name or Numbe' and a plus icon. A large text input area with the placeholder 'Type any text to send' is below the 'To:' field. At the bottom, there is an unchecked checkbox labeled 'Group into one conversation' and a blue 'Send' button.

Figure 16—Send SMS

Messages

You can see your RingCentral messages and reply to the messages from the **Messages** screen. (Figure 17)

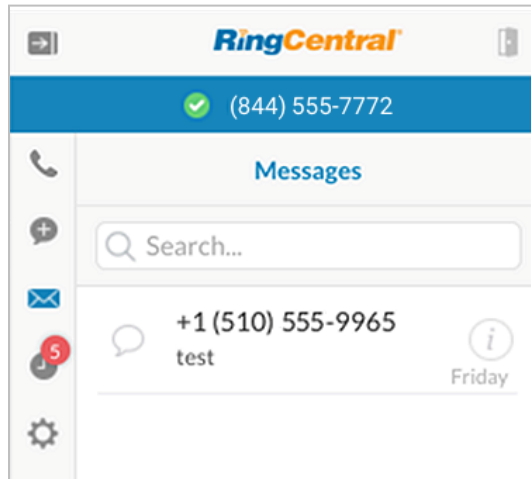


Figure 17—Messages Screen

The **Messages** screen provides a way to search for messages—the list of your conversations. A conversation is a group of messages to a particular phone number, RingCentral contact, or a group. You can bring up additional information about a message by clicking the “i” icon.

Contact Details Screen

RingCentral for MINDBODY will automatically detect if this person is not a client; if not, the **Add Client** button will provide an opportunity to add the contact as a MINDBODY client. (Figure 18)

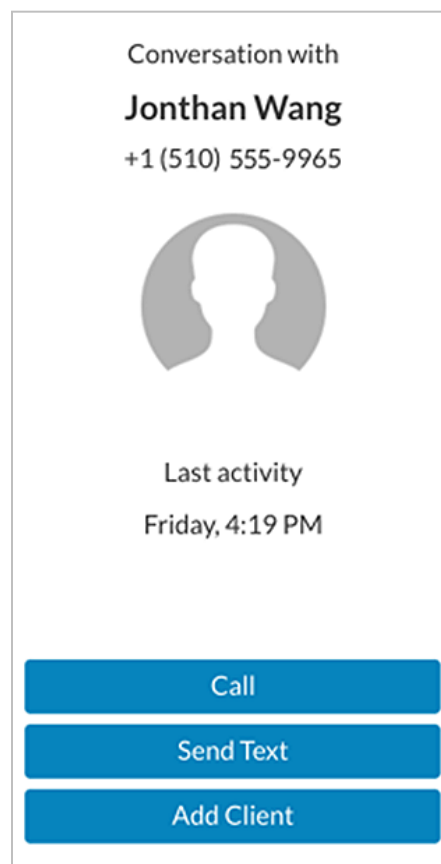


Figure 18—Contact Details Screen

Conversation

You can view and reply to a conversation by selecting the bubble icon from the Messages list. (Figure 19)

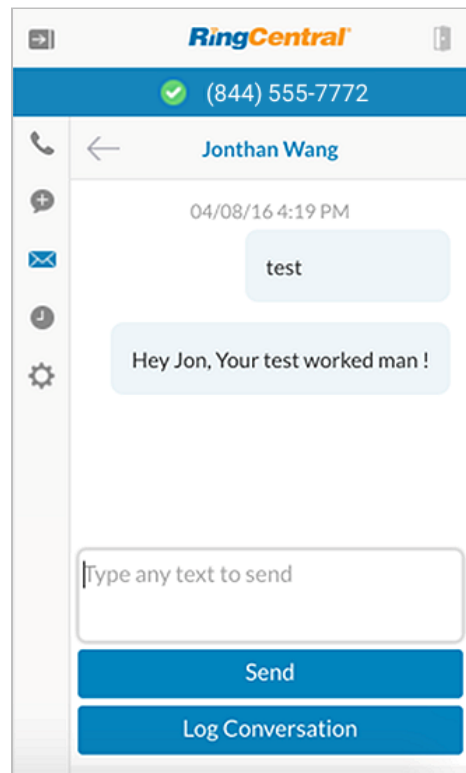


Figure 19—Conversation Screen

Log Conversation

You also have the opportunity to log the SMS conversation in MINDBODY by clicking the **Log Conversation** button. (Figure 20)

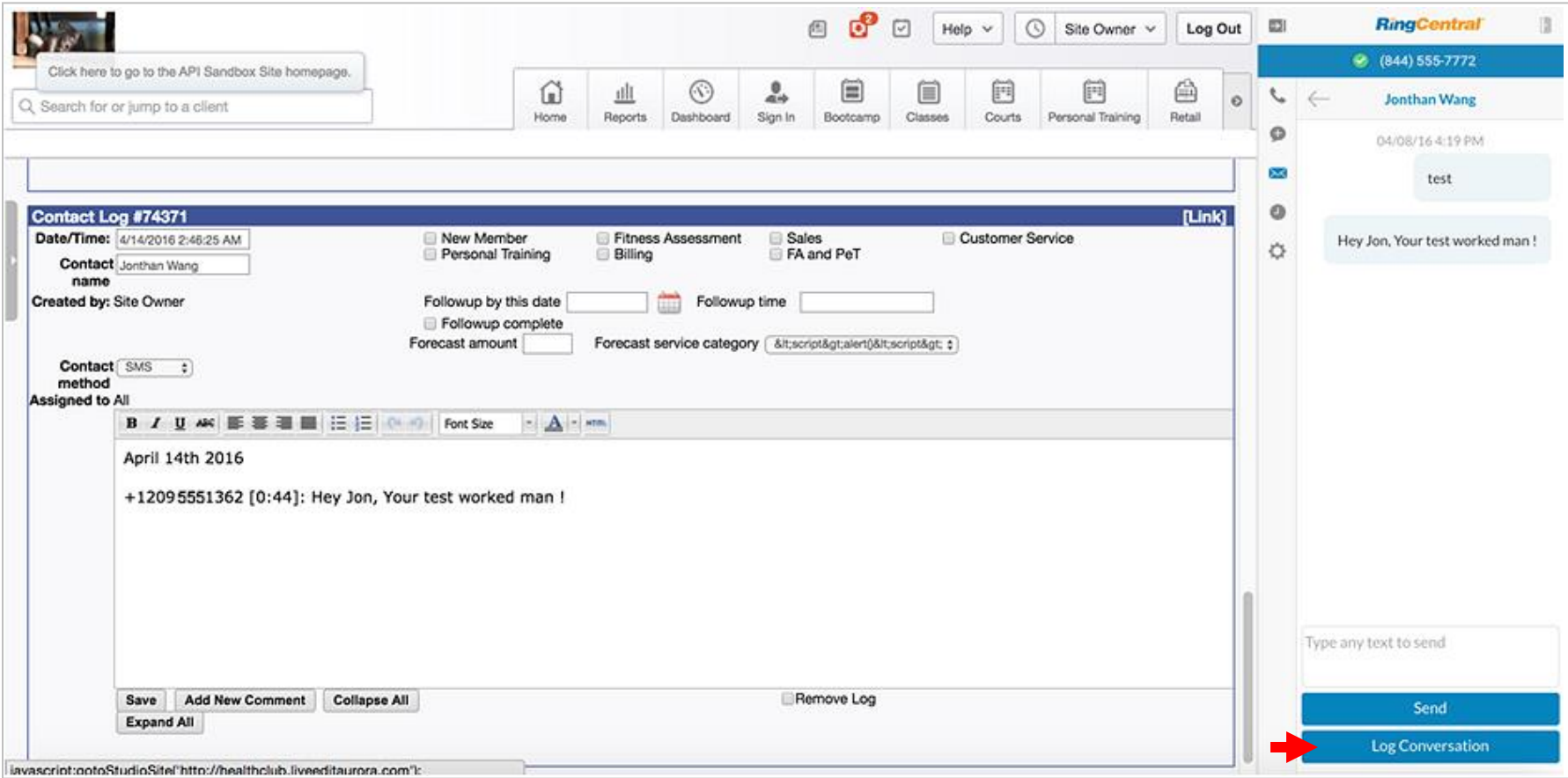


Figure 20—Log Conversation Screen

Call Log

Display a list of calls with summary of information about each call. If call is from one of your contacts, you can view contact details by clicking on a name. You can also see call details by clicking on “i” icon. (Figure 21)

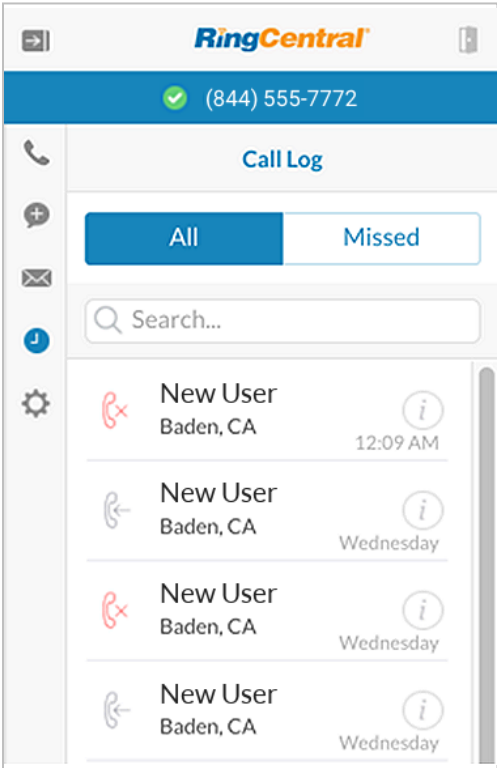


Figure 21—Call Log

Call Details Screen

You can view additional details about the call such as location, time, date, and duration. Similar to the **Contact Details** screen, you can **Call**, **Send Text**, or **Add Contact Log** via the MINDBODY **Call Details** screen. (Figure 22)

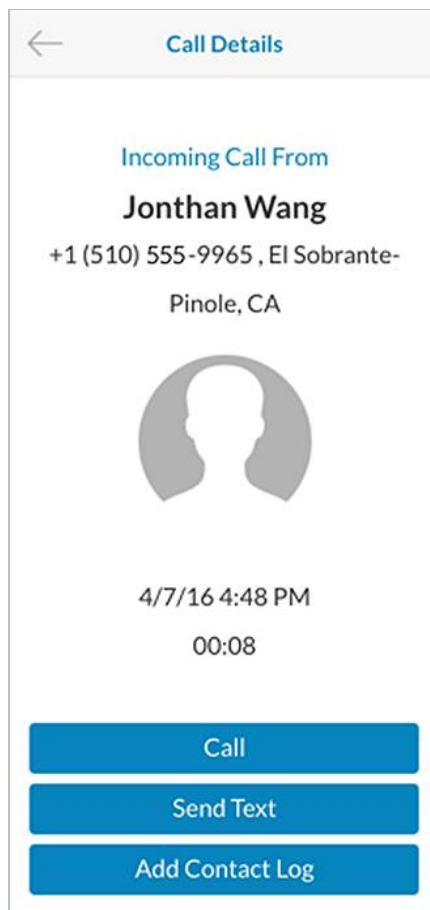


Figure 22—Call Details Screen

Settings

You can configure how you use the app by changing the settings in RingCentral for MINDBODY. This section describes each of these settings. (Figure 23)

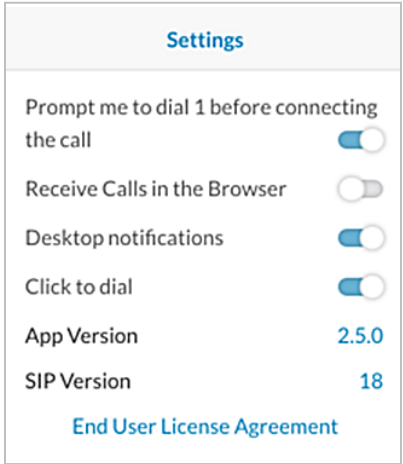


Figure 23—Settings

Prompt me to dial 1 before connecting the call

This guide assumes that you will use your Chrome browser to make and receive calls. To understand how this setting works, we need to explain RingOut mode. In RingOut mode you can use other RingCentral devices such as RingCentral for Windows or RingCentral for Mac (called softphone) or a physical phone device that you purchased along with your RingCentral service.

When the app is in RingOut mode, an incoming call will not ring your browser but rings your RingCentral device. For a call that you initiate from the app, the system will call your RingCentral device first, and after you accept the call, it will attempt to call your party. When you switch on **Prompt me to dial 1 before connecting the call** you will hear a voice prompt asking you to press 1 if you want to make this call. If you turn this setting off, the system will call your RingCentral device *and* the party you initiated the call to without having to press any additional key on your RingCentral device.

Receive Calls in the Browser

This option lets your receive incoming calls in your browser even if you have selected the RingOut option as described in the previous section.

Click to dial

Click to dial enables the phone number in MINDBODY to be a clickable link that you can use to initiate a call to the given phone number. You can see a little RingCentral icon to easily identify a phone number on a client to make a call quickly.

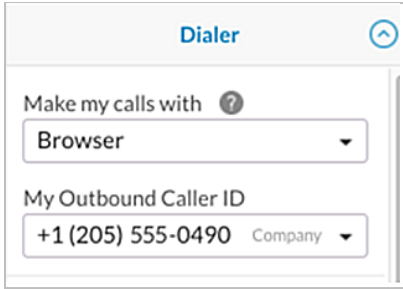


Figure 24—Dialer

Change to RingOut mode

Clicking the caret icon  on the **Dialer** screen brings up dialer setting. The **Make my calls with** drop-down selects the browser by default. (Figure 24)

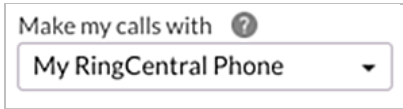


Figure 25—My RingCentral Phone

Selecting **My RingCentral Phone** will change the RingCentral for MINDBODY app to RingOut mode. (Figure 25)

As you click on a phone number, the system prompts you to **Make a call** or **Send SMS**. (Figure 26)

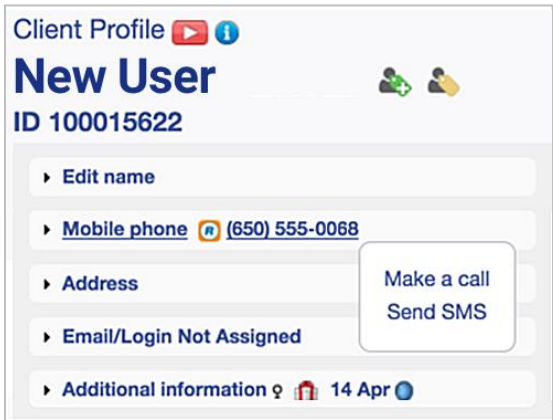


Figure 26—Call or Send SMS

Make a call will prompt you to make sure you really want to initiate a call to avoid accidental clicks. (Figure 27)

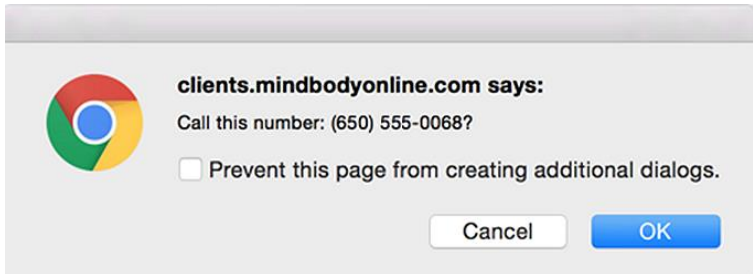


Figure 27—Prevent Accidental Clicks

The system will make an outbound call for you as soon as you click **OK**. (Figure 28)

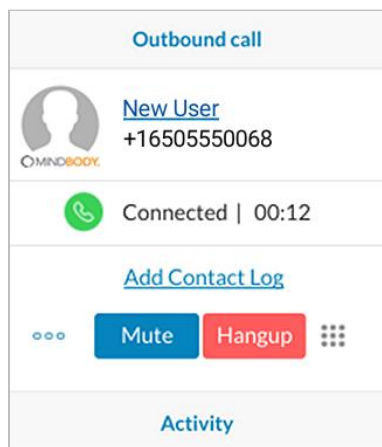


Figure 28—Outbound Call

Selecting **Send SMS** brings up the new SMS screen. Notice that a client phone number is already populated. (Figure 29)

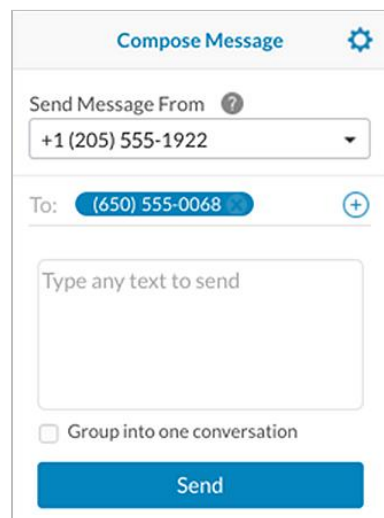


Figure 29—Compose SMS