

# RingCentral for Zapier

## User Guide

# Introduction

Page 4 Changes are highlighted:

## Supported Triggers

- **New Call Recording**—Triggers when a new call recording is generated.
- **Missed Call**—Triggers when a new call is missed.
- **New SMS/MMS Received (Instant)**—Triggers when a new SMS/MMS is received
- **New SMS Sent trigger (Instant)**—Triggers when a new SMS is sent
- **Call Ended**—Triggers when a call that was connected ends.
- **New Voicemail**—Triggers when a new voicemail arrives in your account.

## Supported Actions

- **Create a video meeting**—Create an instant RingCentral Video meeting with your preferred settings.
- **Send Fax**—Send a new Fax using a document of your choice.
- **Send SMS/MMS**—Send an SMS/MMS with the text or attachment you specify.
- **Generate RingOut Call**—Start RingOut call to connect two phone numbers of your choice.

In this guide we will show you how to:

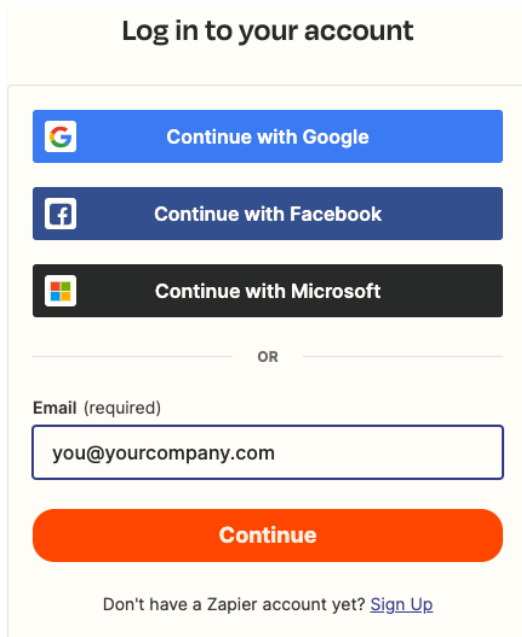
- Login and create your first Zap (New Call Recording)
- Test Your Trigger
- Select an Action App
- Map How Data Is Stored in Google Drive
- Publish Your Zap and Turn it ON
- How Other Triggers Work
- How RingCentral Actions Work
- Setting Up RingCentral Action

# Getting Started with Zapier

## Login and Create Your First Zap

Follow the steps below to make your first Zap in Zapier.

**Step 1:** Login to your Zapier account. (Figure 1)

The image shows the Zapier login interface. At the top, it says "Log in to your account". Below this are three social login buttons: "Continue with Google" (blue), "Continue with Facebook" (dark blue), and "Continue with Microsoft" (black). Below these is a horizontal line with the word "OR" in the center. Underneath is the text "Email (required)" followed by a text input field containing the placeholder "you@yourcompany.com". Below the input field is a large orange "Continue" button. At the bottom, there is a link that says "Don't have a Zapier account yet? [Sign Up](#)".

Log in to your account

Continue with Google

Continue with Facebook

Continue with Microsoft

OR

Email (required)

you@yourcompany.com

Continue

Don't have a Zapier account yet? [Sign Up](#)

Figure 1—Login to Zapier

**Step 2:** Click **+ Create Zap** on top left corner of the Zapier home page. (Figure 2)

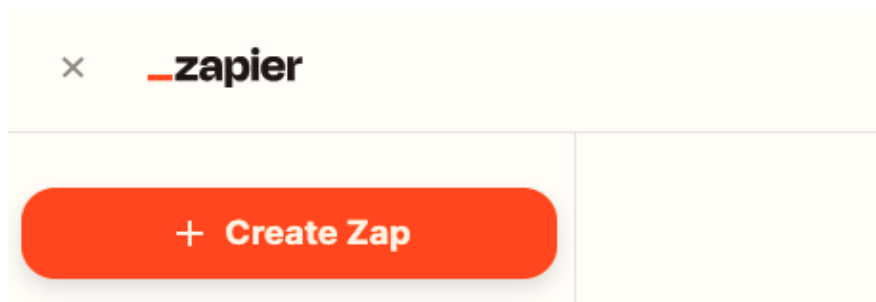


Figure 2— + Create Zap

After clicking **+ Create Zap** you should see a screen as shown below in Figure 3.

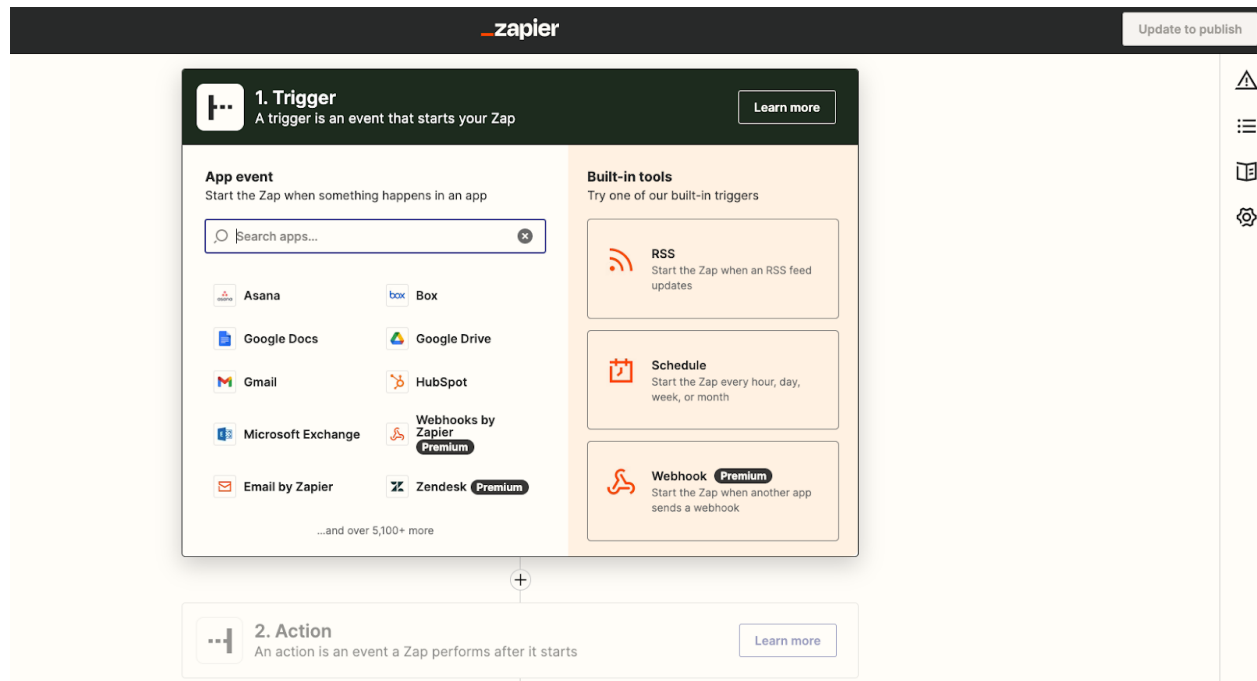


Figure 3—Choose a Trigger App

**Step 3:** Locate the RingCentral trigger app and click it. (Figure 3)

Once you select the RingCentral app, you will see the events/triggers you can configure for your RingCentral accounts. Notice the screen in (Figure 4) has only a few triggers. There are additional triggers available for your RingCentral account. We will discuss all of these triggers and how to configure action for them.

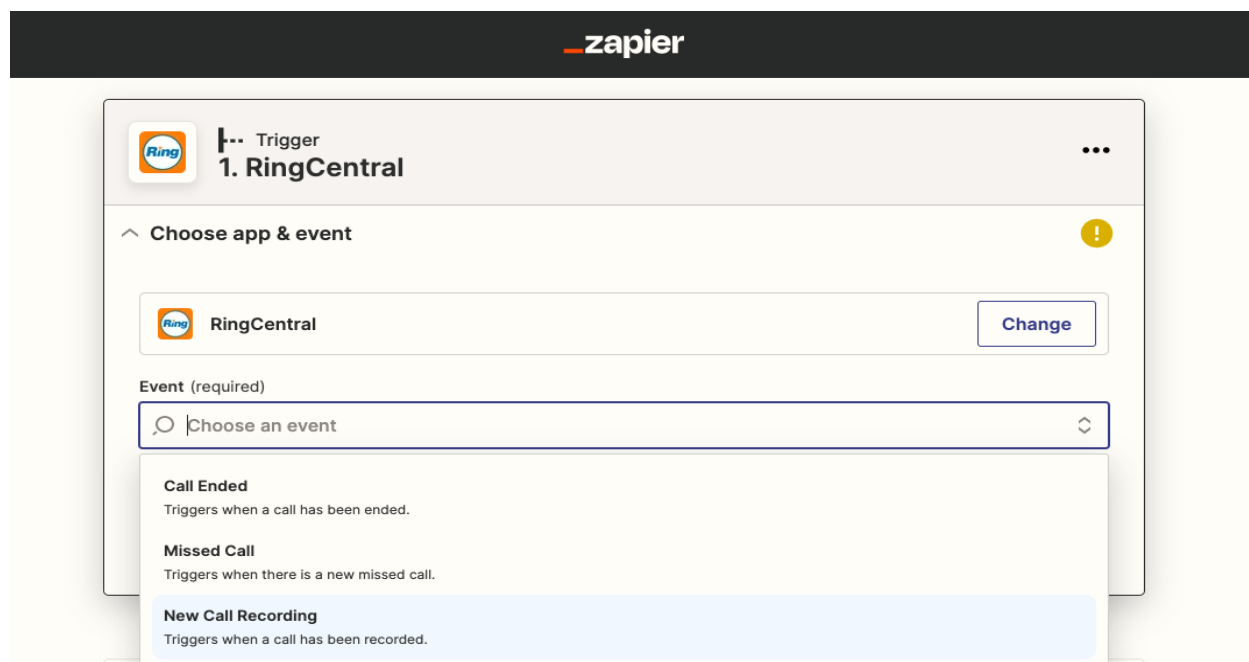


Figure 4—Select RingCentral Trigger: New Call Recording

**Step 4:** Create a new Call Recording Trigger.

You will see a screen that prompts you to select a RingCentral account. (Figure 5)

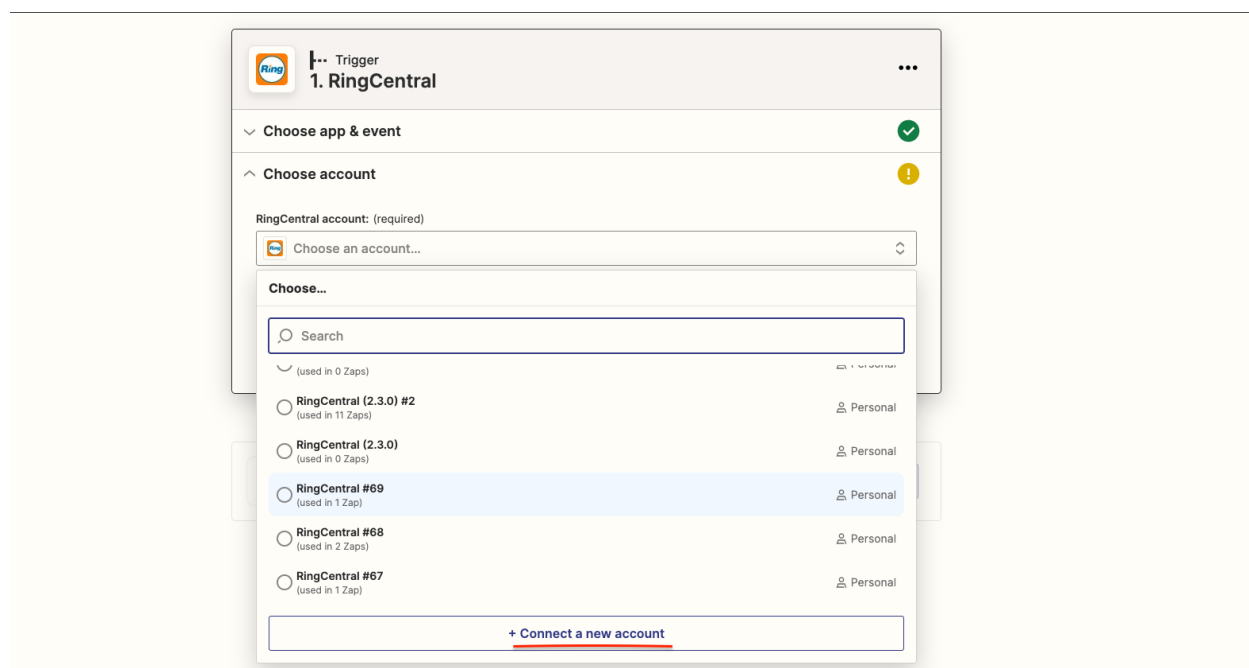


Figure 5—Select a RingCentral Account

Since you are doing this for the first time, click the Connect a New Account button. If you have already added an account earlier you can select from the list or search for the account.

**Step 5:** Enter your RingCentral credentials.

You will be prompted for your RingCentral credentials. (Figure 6&7)

The image displays two side-by-side screenshots of the RingCentral login interface. Both screenshots show a browser window with the title 'Sign in - RingCentral' and the URL 'login.ringcentral.com/?responseType=...'. The left screenshot shows the initial login page with the RingCentral logo at the top. Below the logo is a 'Sign In' header. Underneath, there is a section titled 'Email or Phone Number' with a text input field containing '(650)555-1234'. Below this field is a blue 'Next' button. Further down, there is a section titled 'Or sign in with' with two buttons: 'Google' and 'Single Sign-on'. The right screenshot shows a more detailed login form. It has a 'Sign In' header. Below this, there is a section titled 'Direct, Fax or Main Number' with a text input field containing '(650)555-1234'. Below this field is a section titled 'Extension (Optional)' with a text input field. Below that is a section titled 'Password' with a text input field and a toggle icon. At the bottom of the form, there are two buttons: 'Back' and 'Sign In'. Below the form, there is a link that says 'Forgot Password?'.

Figure 6&7—Login with Your RingCentral Credentials

# Test your Trigger

## Step 1: Test trigger.

You are presented with the following screen that will search for the call recording in the account you connected in the previous step. (Figure 8)

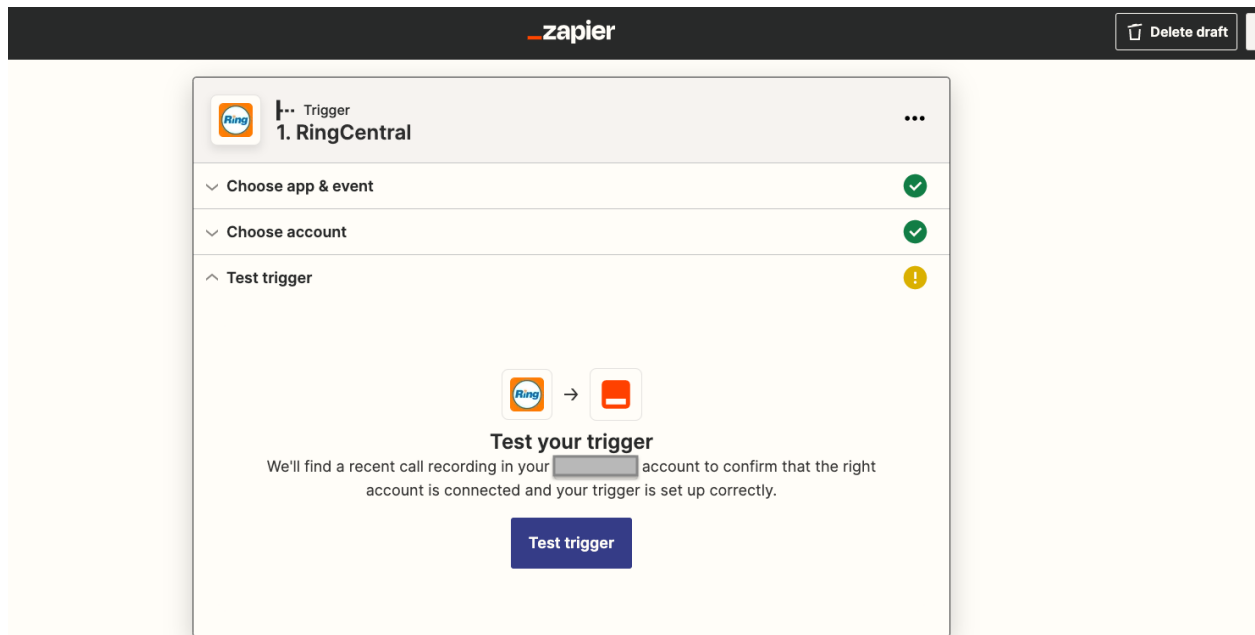


Figure 8—Test trigger

## Step 2: Make a test phone call, before testing the trigger.

Make a test phone call from the same RingCentral account you set up in earlier steps and make sure you have recording turned on for the call. (Figure 9)

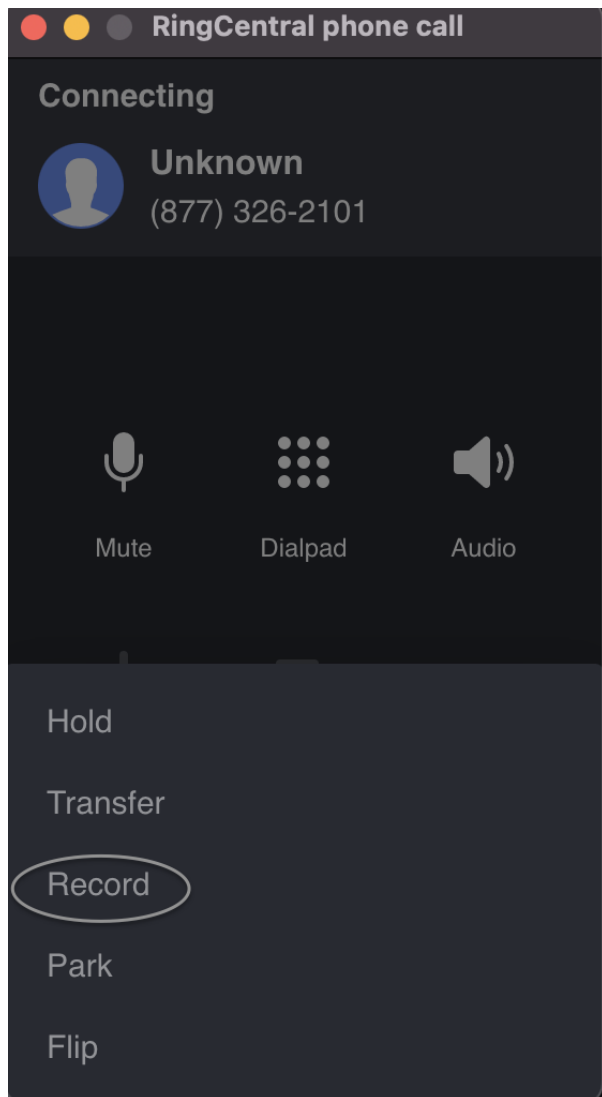


Figure 9—Make a Test Phone Call

RingCentral for Zapier will find your new recording automatically.

**Step 3:** After clicking the test trigger you will see the screen below with all parameters to make sure it is your test call that you just made. (Figure 10)



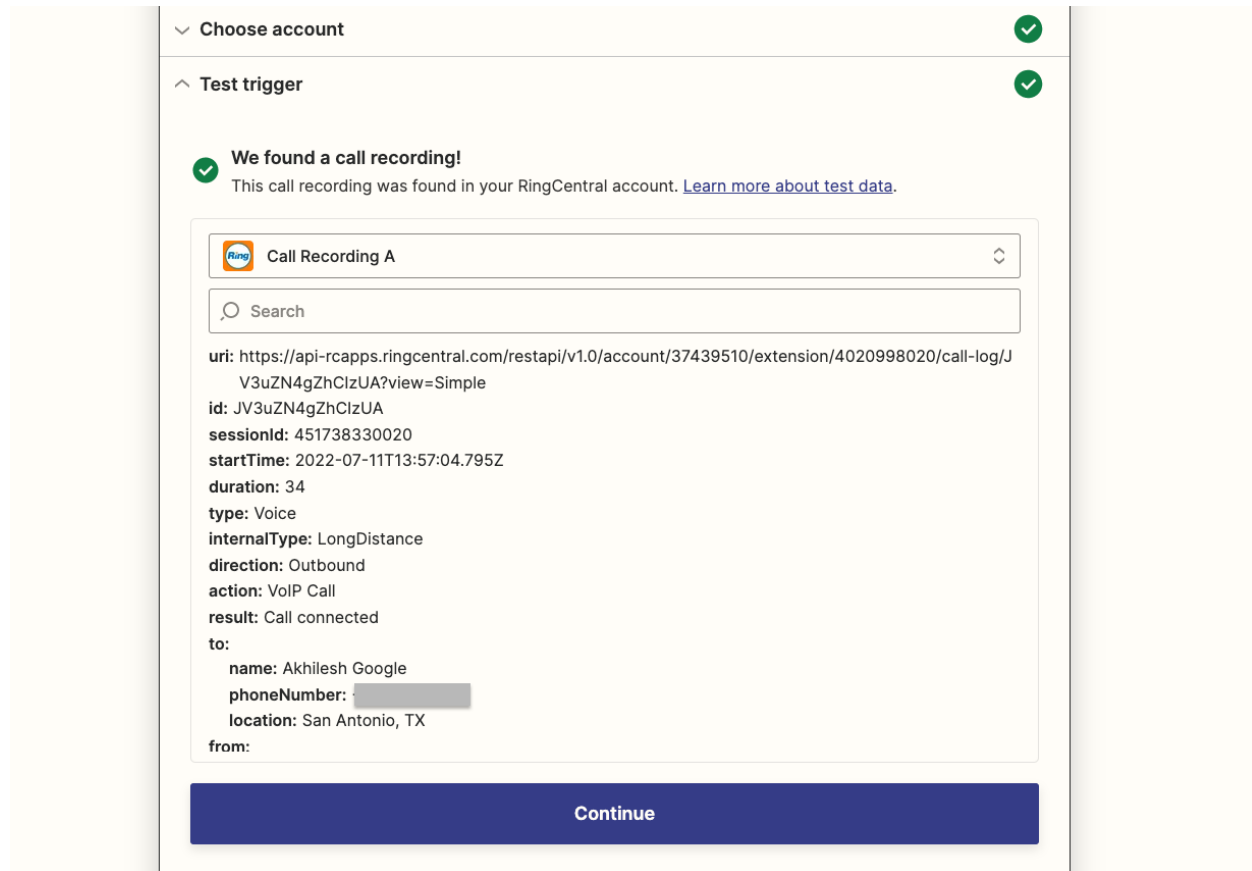


Figure 10—View Your Test Phone Call

Press Continue to move on to the next step.

## Select an Action App

The next step is to select an Action App, which will help you do what you want to do with your call recording. You can select from many connectors available. In this example we will choose the Google Drive connector to put our call recording on our Google Drive and upload the file.

**Step 1:** Select a Google Drive Action.

Select Upload File on the Select Google Drive Action screen. (Figure 11)

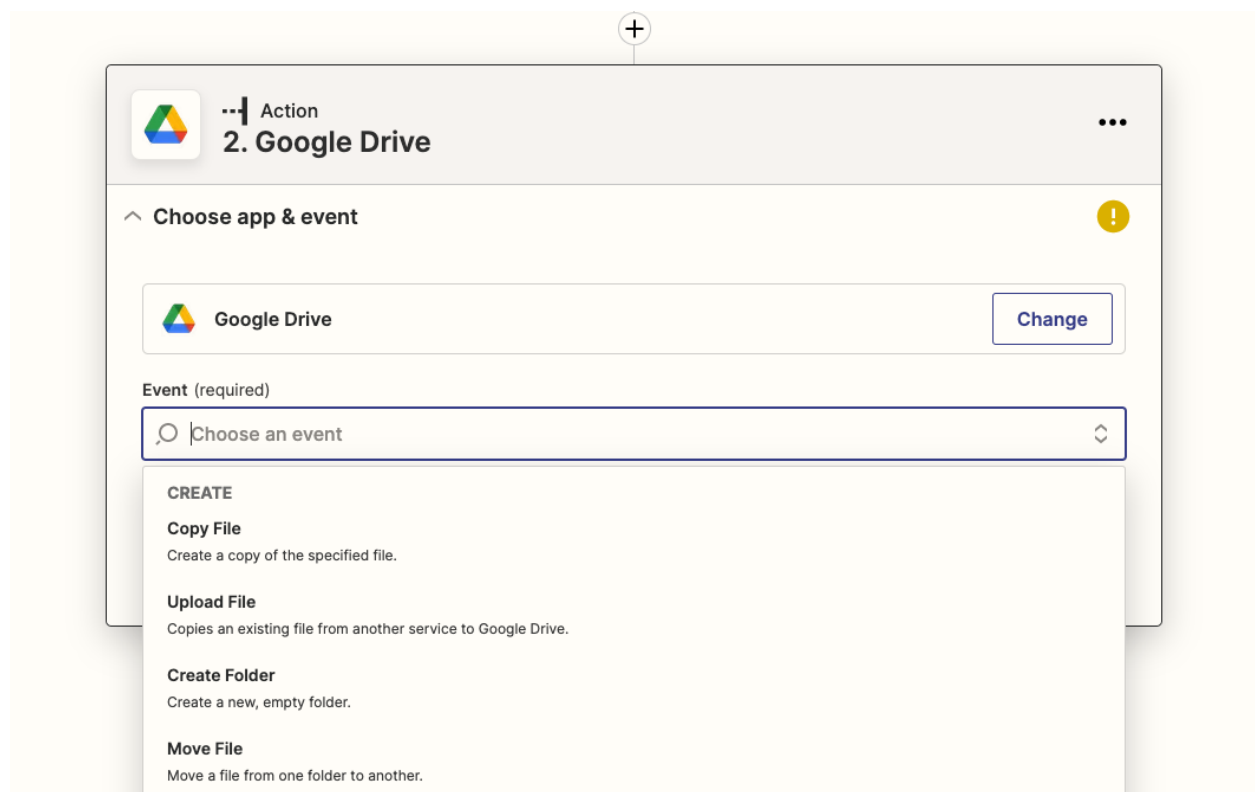


Figure 11—Select Upload File for Google Drive Action

You will be prompted to enter a new Google account or select an existing account, the same way you entered the RingCentral account.

**Step 2:** Select Google Drive account or create new account.

Click the Connect a New Account button to create a new Google Drive account. (Figure 12)

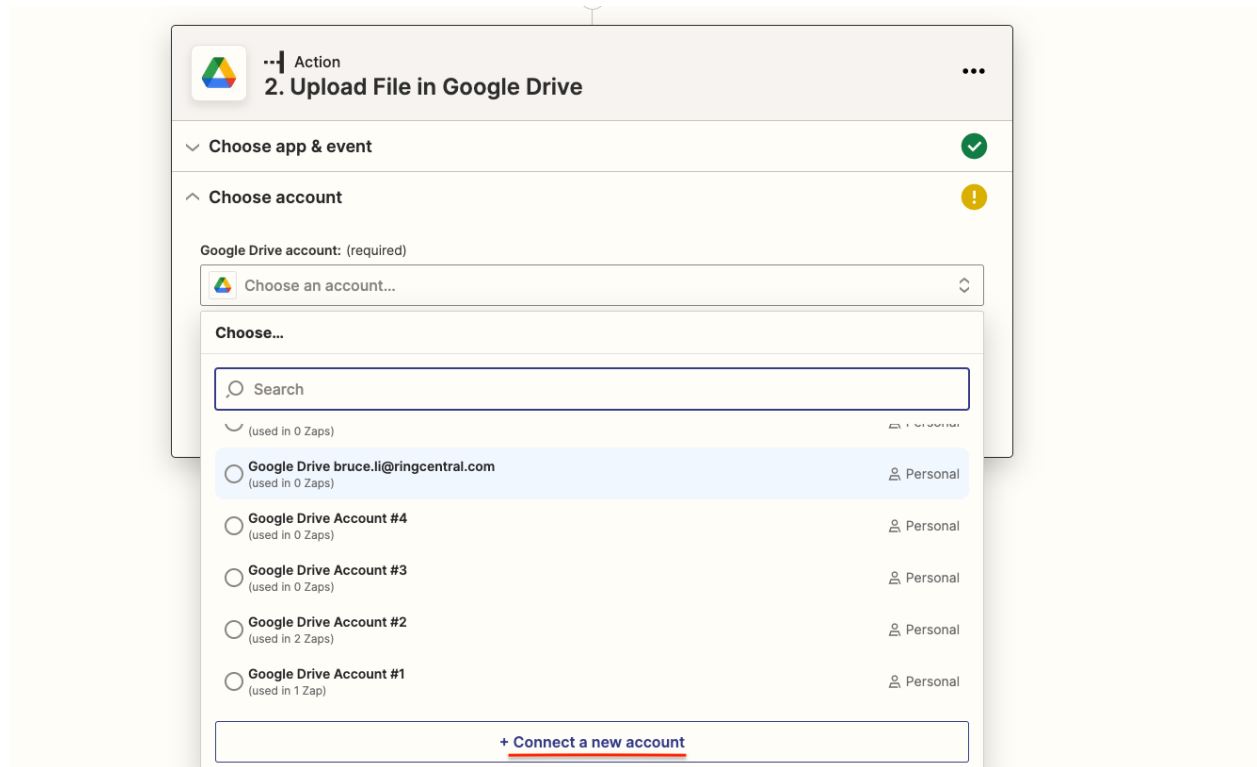


Figure 12—Select or Create a Google Drive Account

**Step 3:** Allow Zapier to access your Google Drive account.

Make sure you allow Zapier to access your Google Drive account. (Figure 13)

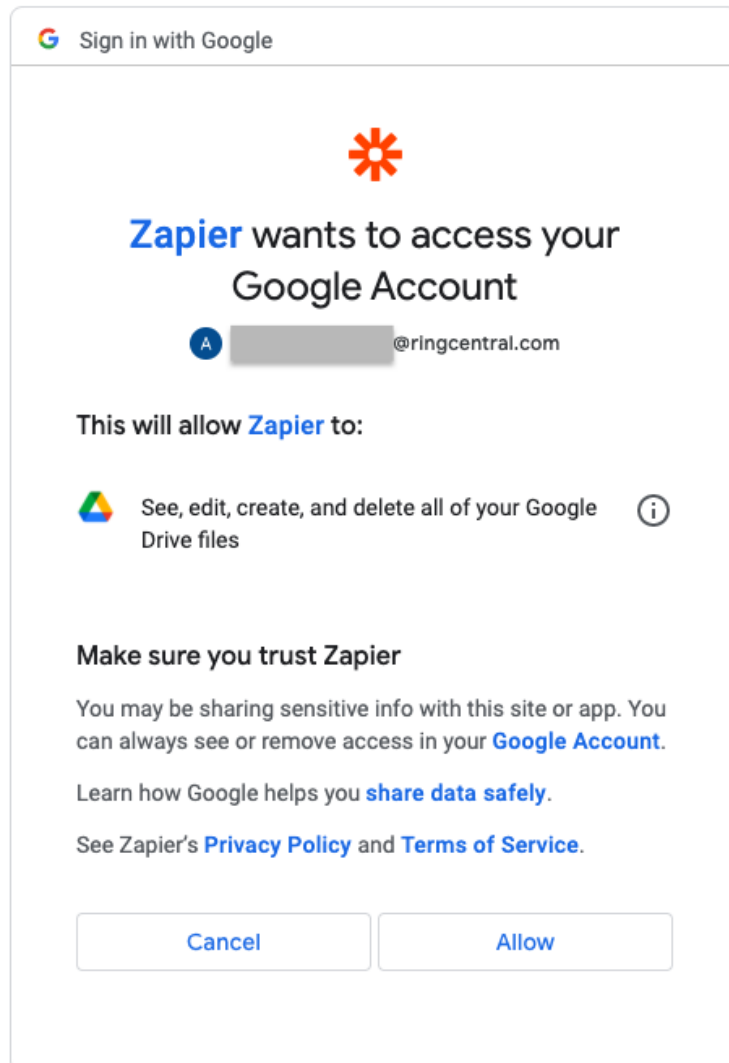


Figure 13—Allow Zapier to Access Your Google Drive Account

**Step 4:** Continue to set up action

After connecting your new Google Drive account, verify the account name and continue to set up the action.

The screenshot shows the Zapier 'Action' configuration screen for '2. Upload File in Google Drive'. The interface is divided into three main sections: 'Choose app & event', 'Choose account', and 'Set up action'. The 'Choose app & event' and 'Choose account' sections are both marked with a green checkmark, indicating they are completed. The 'Choose account' section shows a dropdown menu with the selected account 'Google Drive [redacted]@ringcentral.com #2'. Below the dropdown, there is a note about Google Drive's security partnership with Zapier and a link to manage accounts. A blue 'Continue' button is visible. The 'Set up action' section at the bottom is marked with a yellow warning icon, indicating it is not yet completed.

---| Action  
2. Upload File in Google Drive

✓ Choose app & event

^ Choose account

Google Drive account: (required)

Google Drive [redacted]@ringcentral.com #2

Google Drive is a secure partner with Zapier. [Your credentials are encrypted & can be removed at any time.](#) You can [manage all of your connected accounts here.](#)

Continue

✓ Set up action

Figure 14—Verify account name and continue

## Map How Data Is Stored in Google Drive

The next step is to map how the data is stored in Google Drive. This requires mapping the incoming data to your Google Drive account. In this case a File is required by the Google Drive connector, and the rest of the fields are optional.

**Step 1:** Map incoming data to Google Drive.

Map how the incoming data is stored in Google Drive. (Figure 15)

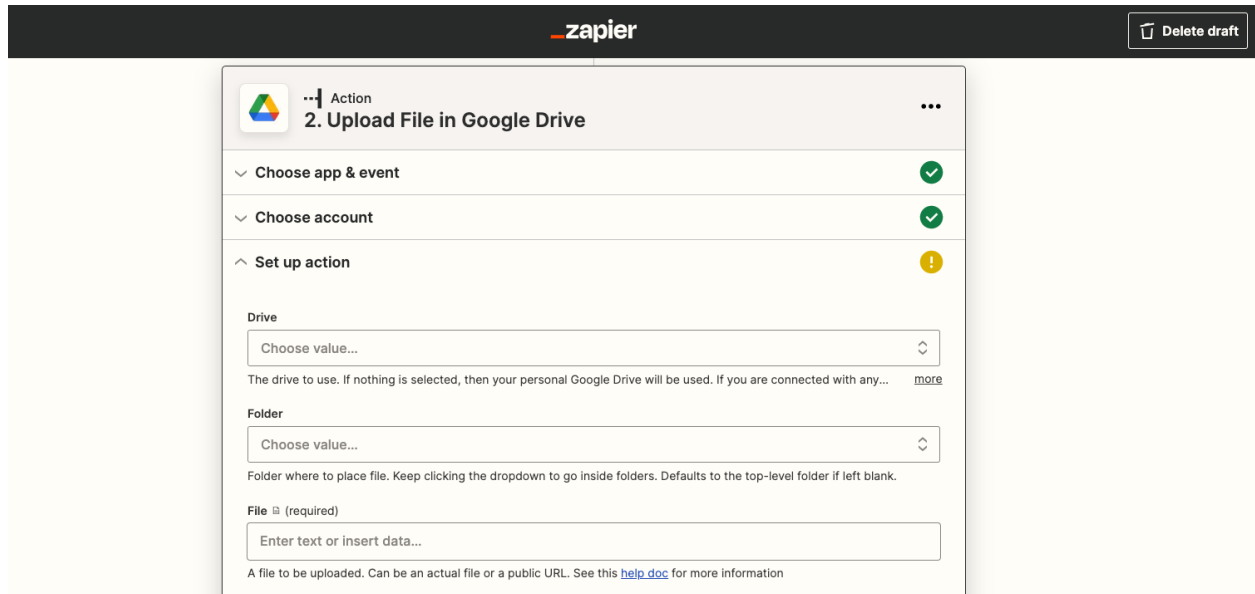


Figure 15—Map Incoming Data in Google Drive

**Step 2:** Click the text box **File** field.

That action will pull all call recording fields from RingCentral that you can map to. In this case we will select Recording Audio. (Figure 16)

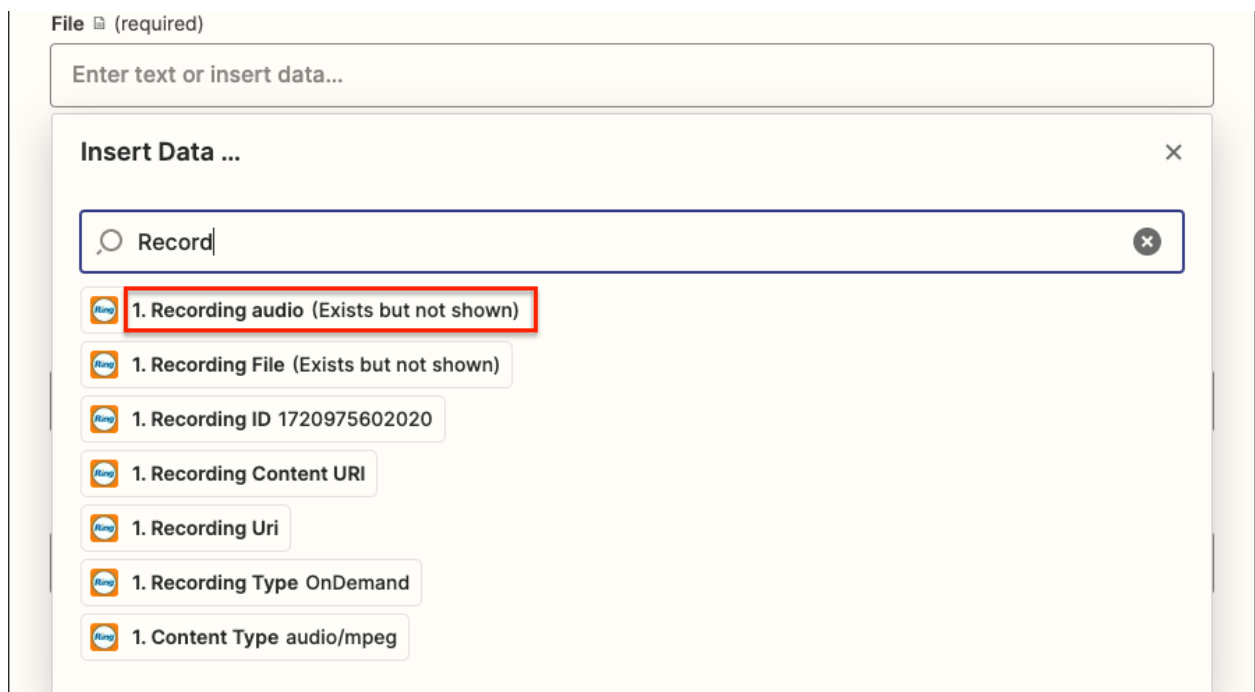


Figure 16—New Call Recording File Selected for Upload to Google Drive

**Step 3:** Test and Continue for files can be stored in Google Drive.

Make sure the files can be stored in your Google Drive. This is highly recommended to ensure the proper connection to Zapier. Feel free to delete the test file from your Google drive once you are done configuring. (Figure 17)

The image shows the Zapier configuration interface for the action '2. Upload File in Google Drive'. The interface is divided into several sections:

- Choose app & event:** Indicated by a green checkmark.
- Choose account:** Indicated by a green checkmark.
- Set up action:** Indicated by a green checkmark.
- Test action:** Indicated by a yellow warning icon.

Under the 'Test action' section, there is a visual representation of the action: a red square icon (representing a file) followed by a right-pointing arrow and the Google Drive icon. Below this, the text reads: 'Send Upload File to Google Drive'. A note states: 'To test Google Drive, we need to create a new upload file. This is what will be created:'.

Below the note is a search bar labeled 'Search item data...'. Underneath the search bar, the following fields are listed:

- new\_name:**
- new\_extension:**
- file:** hydrate|||.eJxNkE-PwiAQxb\_LnJtCsVjb214269Vkw3CqGQLNEA1xvS779RwMHN7835v\_rxAB5\_R5zE\_Z4QBvqAC61NWXuNoDQxi37dS9LICvaQc3JlwwhsHibhsK1Bah4UCPrWLxcmMXrkt0uB9vNgJKfnvoeI1wfCCMq7oDvMtEA-3p4kqh5hqEx5-Csp8k-OnqOQ8L94QQgkb-ns6blDOcxoYc2isqqP1V00XRTXVOjgWka6ZLbs3NWDlWbbr2l0vG05dHalhhdWd4H0n91xQsfIWWNf1H1osYQl:1oAtvC:nWXZzIPOYpnz9Vb0EnD45Wh5XYO|||hydrate

Below the file field, there is a section titled 'Empty fields:' with the following options:

- Drive:** empty (optional)
- Folder:** empty (optional)
- Convert to Document?:** empty (optional)

At the bottom of the interface, there are three buttons: 'Test & review', 'Test & continue' (highlighted in blue), and 'Skip test'.

Figure 17—Confirm Storage of Files in Google Drive

**Step 4:** After Click Create & Continue on the screen shown in Figure 17 above.

Zapier will attempt to upload the file to your Google Drive and you should see Test Successful! (Figure 18)

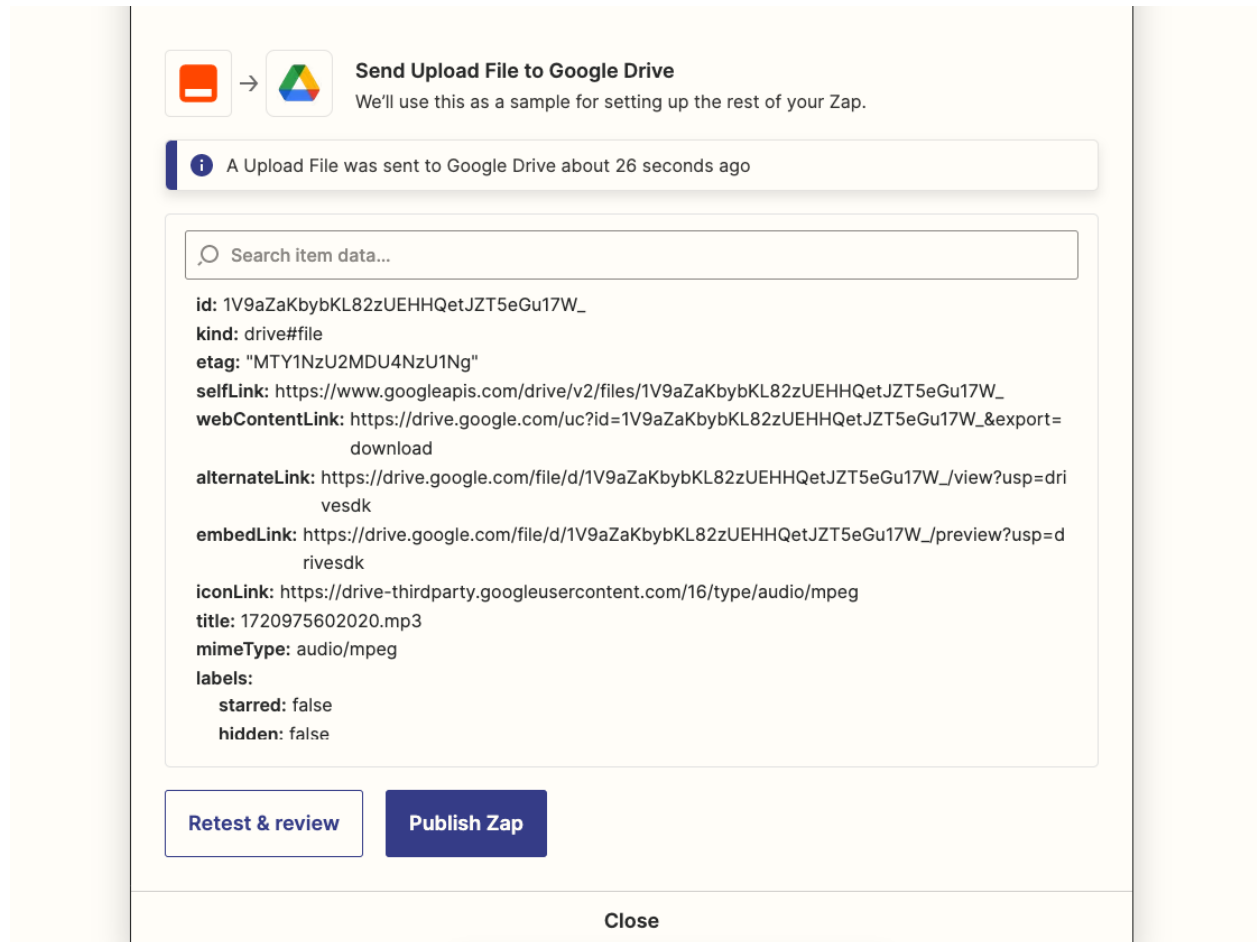


Figure 18—Successful Test of Files Uploaded to Google Drive

## Publish Your Zap and Turn It ON

**Step 1:** Finally click Publish Zap.

You should see a pop up screen displaying **Ready to publish your Zap?** Where you can publish the zap and turn it on. (Figure 19)



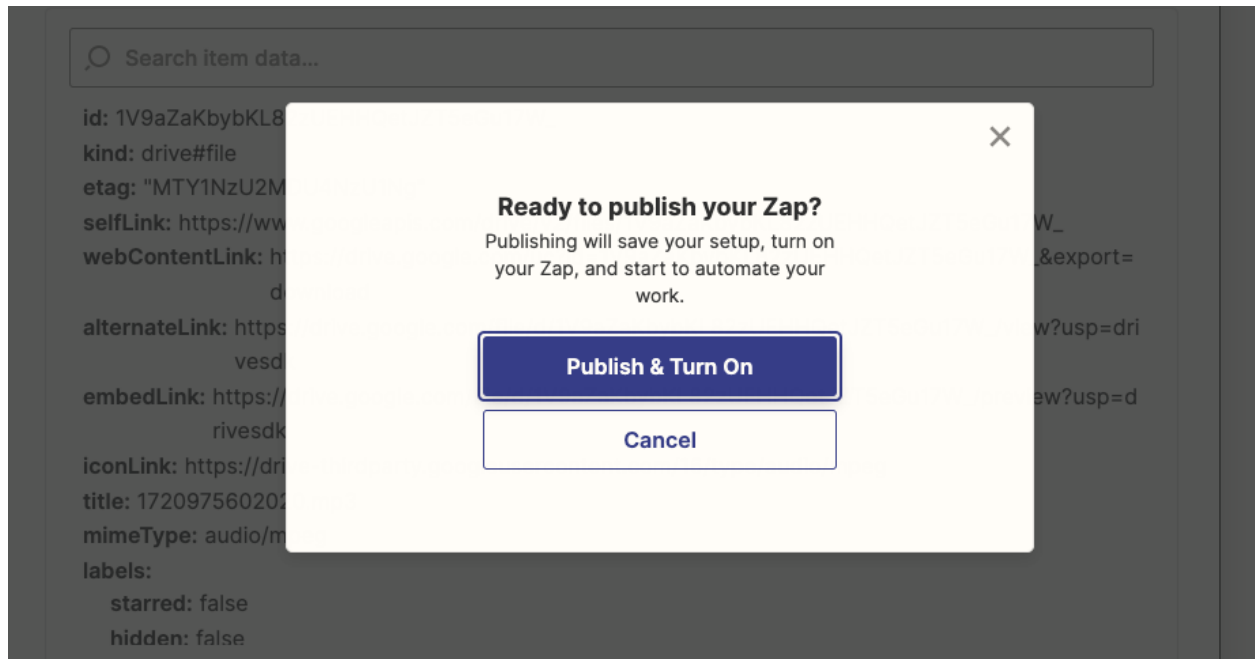


Figure 19—Publish Your Zap and Turn It ON

**Step 2:** Enter your Zap name into your Zapier folder.

After naming your zap you should see a zap created in the private folder with zap toggled to on as shown in Figure 20.

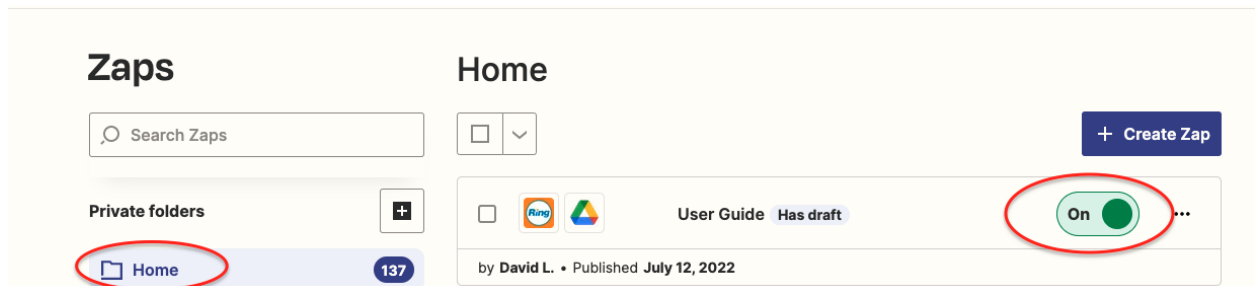


Figure 20—Your Zap in the Private Folder

**Step 3:** Confirm that your zap is running.

You should see the zap gets triggered whenever there is a new call recording in your RingCentral account and the action executes, which in this case is a recording file that gets saved to the google drive account.

## How Other Triggers Work

In this section we will show you how to create other RingCentral triggers like Missed Call, New Voicemail, New SMS Received (Instant), etc.

**Step 1:** Select a RingCentral Trigger for a Missed Call. (See page 8 for previous example.) (Figure 21)

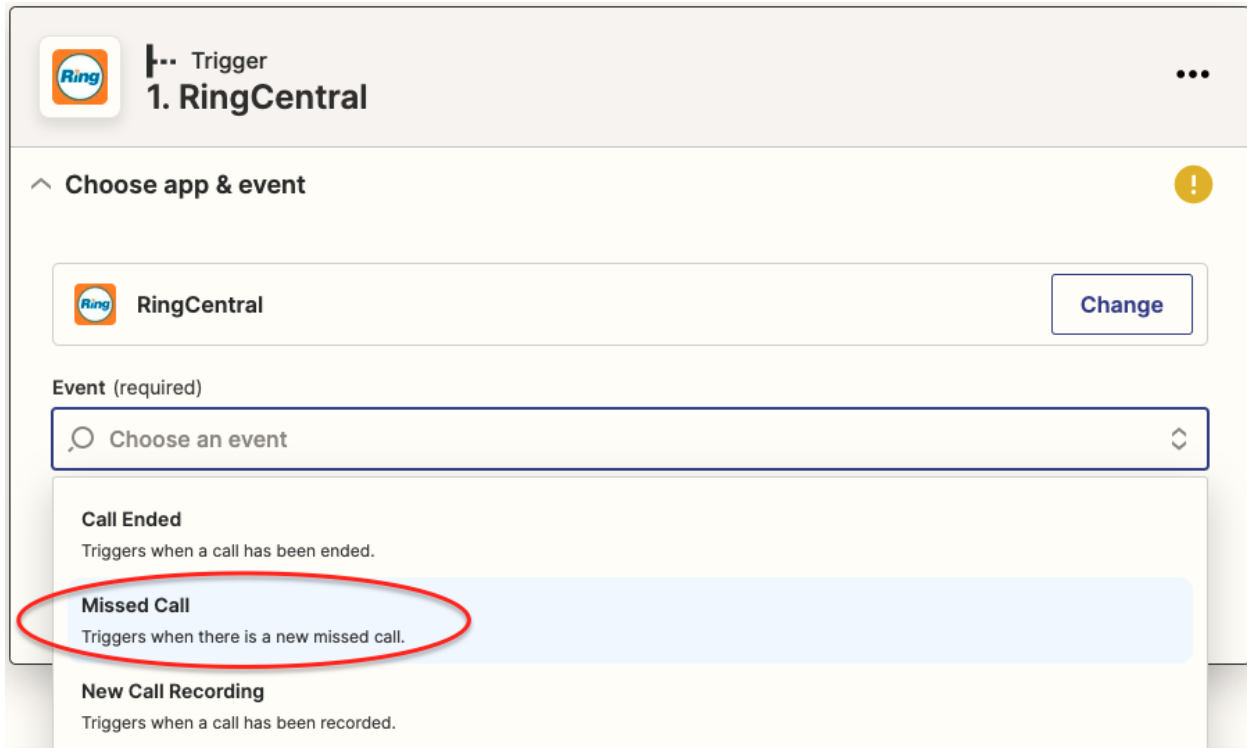


Figure 21—Select RingCentral Trigger for a Missed Call

Similar to the New Call Recording trigger which we worked from the previous step, please follow similar steps for every trigger.

**Step 2:** Choose your RingCentral Account.

**Step 3:** Test Trigger.

But before testing each trigger perform below test,

Missed Call - Leave a missed call to your RingCentral account.

Call Ended - Make a call (Inbound/Outbound) from RingCentral account and end it.

New Voicemail - Leave a voicemail to your RingCentral account.

New SMS Received (Instant) - Send a text message to your RingCentral account.  
New SMS Sent (Instant) - Send a text message from your RingCentral account.

## How RingCentral Actions Work

RingCentral App also supports actions in the Zapier platform which can work with different supported applications, below are the actions supported from RingCentral.

- **Create a video meeting**—Create an instant RingCentral Video meeting with your preferred settings.
- **Send Fax**—Send a new Fax using a document of your choice.
- **Send SMS**—Send an SMS with the text you specify.
- **Generate RingOut Call**—Start RingOut call to connect two phone numbers of your choice.

**Step1** : Select App.

In this step let's select the Gmail app as shown in screen Figure 22.

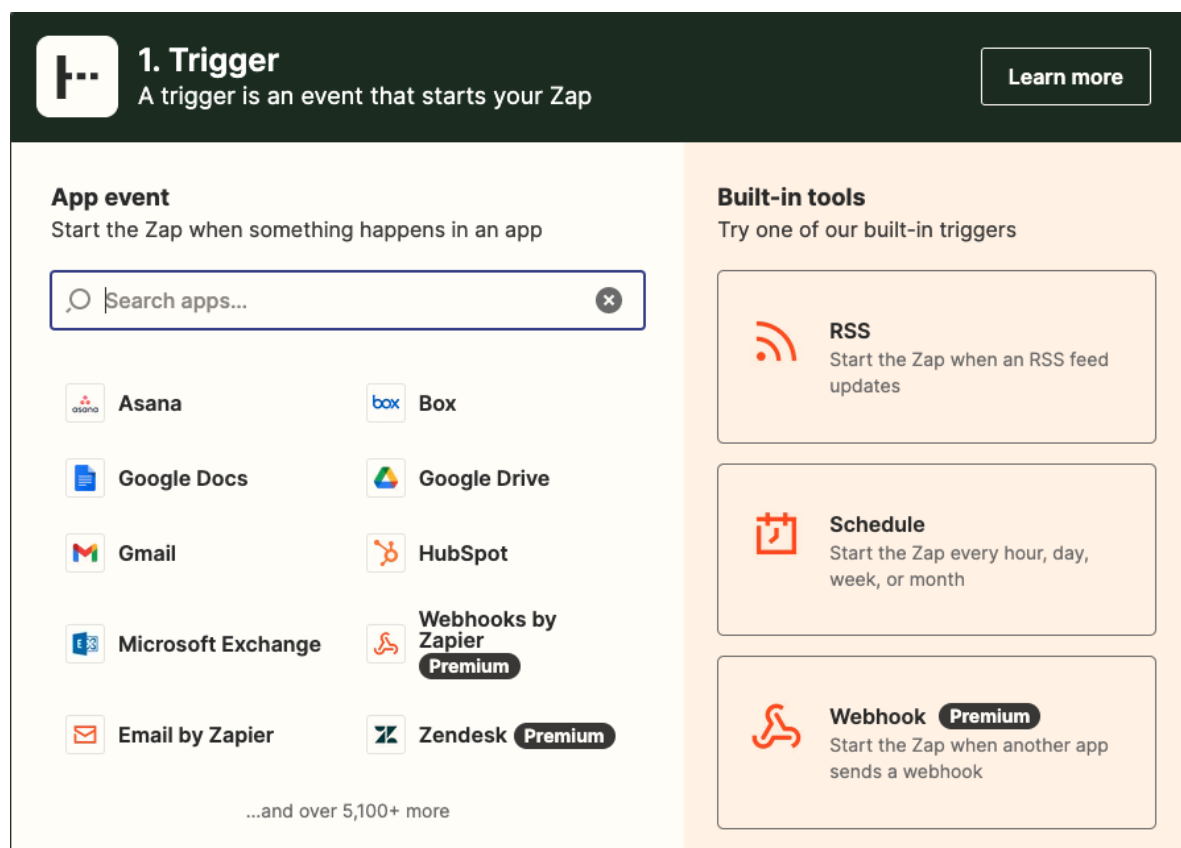
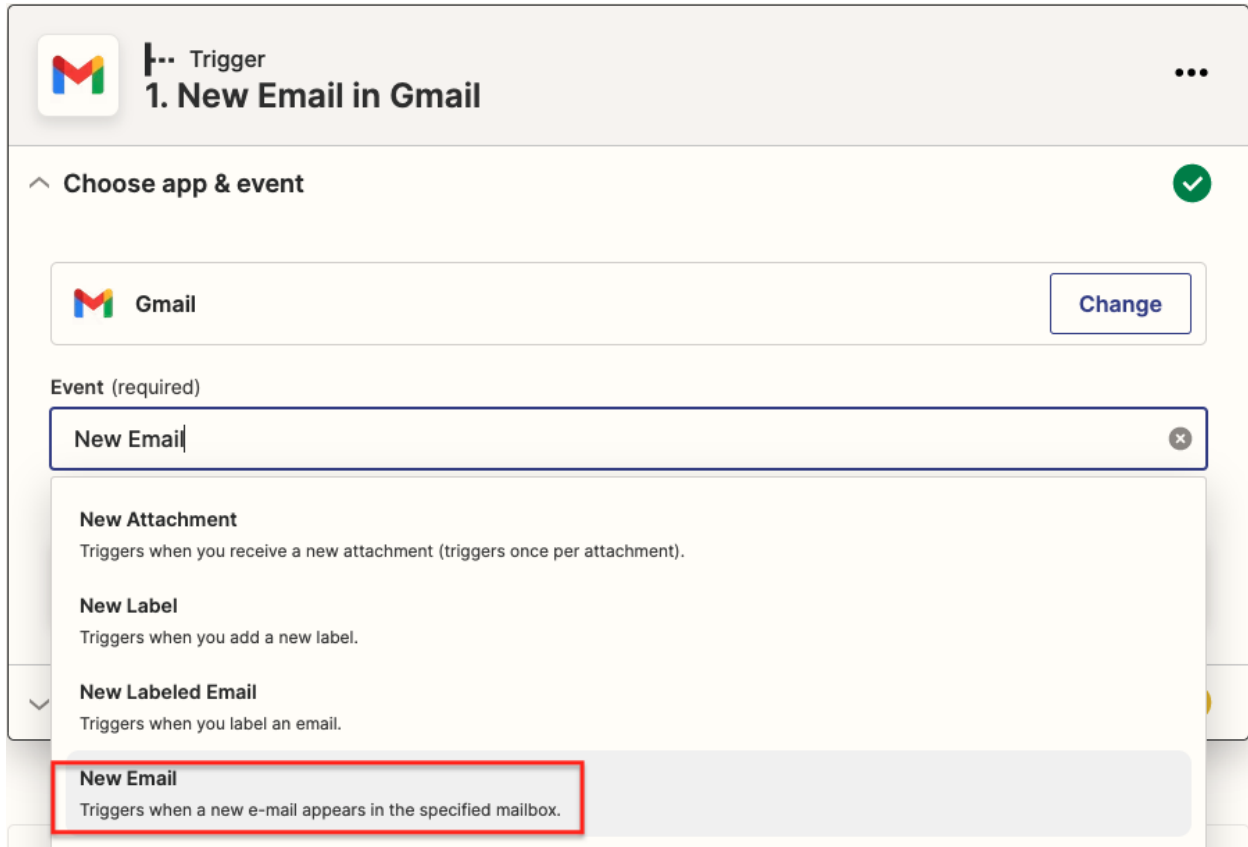


Figure 22— Select Gmail App.

**Step 2:** Select New Email Event.

This zap triggers whenever a new email is present in the specified mailbox as shown in screen (Figure 23).



The screenshot shows the Zapier configuration interface for a trigger. At the top, it says "Trigger" and "1. New Email in Gmail". Below this is a section "Choose app & event" with a green checkmark. Under "Choose app & event", "Gmail" is selected, and there is a "Change" button. Below that, the "Event (required)" dropdown is open, showing a list of events. The "New Email" event is selected and highlighted with a red box. The other events listed are "New Attachment", "New Label", and "New Labeled Email".

**1. New Email in Gmail**

Choose app & event

Gmail Change

Event (required)

New Email

New Attachment  
Triggers when you receive a new attachment (triggers once per attachment).

New Label  
Triggers when you add a new label.

New Labeled Email  
Triggers when you label an email.

New Email  
Triggers when a new e-mail appears in the specified mailbox.

Figure 23— Select New Email Event.

**Step 3:** Choose an account.

Choose your gmail account in your next step from the list or connect a new account and continue to test the trigger as shown in screen below (Figure 24).

Trigger  
**1. New Email in Gmail**

✓ Choose app & event

^ Choose account

Gmail account: (required)

Gmail [redacted]@blueabacusdesign.com

Gmail is a secure partner with Zapier. [Your credentials are encrypted & can be removed at any time.](#) You can [manage all of your connected accounts here.](#)

**Continue**

Figure 24— Choose a gmail account.

**Step 4:** Set up a trigger.

In this step set up a trigger by selecting the Label/Mailbox where you receive the mail and action gets executed as shown in screen below (Figure 25).

Trigger  
**1. New Email in Gmail**

✓ Choose app & event

✓ Choose account

^ Set up trigger

Label/Mailbox

INBOX

Label/Mailbox Custom

Search...

☐ CHAT  
CHAT

☐ SENT  
SENT

☒ INBOX  
INBOX

Figure 25—Set up a trigger to choose a mailbox.

**Step 5:** Test the trigger.

After selecting the mailbox and continuing to test the trigger make sure you leave an email in the gmail account you selected in the previous step, press the Test Trigger button as shown in screen below (Figure 26).

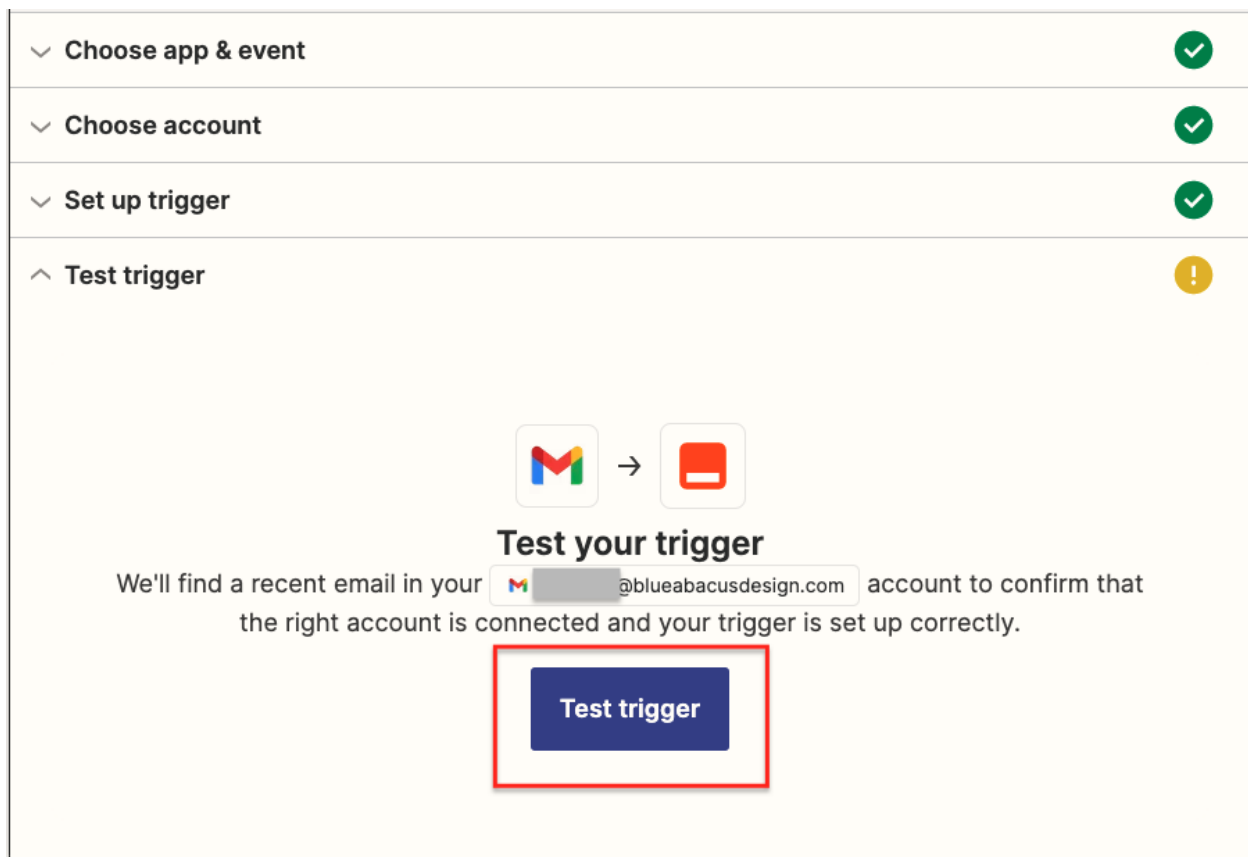


Figure 26—Test trigger by clicking the test trigger button.

**Step 6:** We found an email!.

You should see a success message with “We found an email!” as shown in screen below (Figure 27). Press the continue button to set up the RingCentral Action.

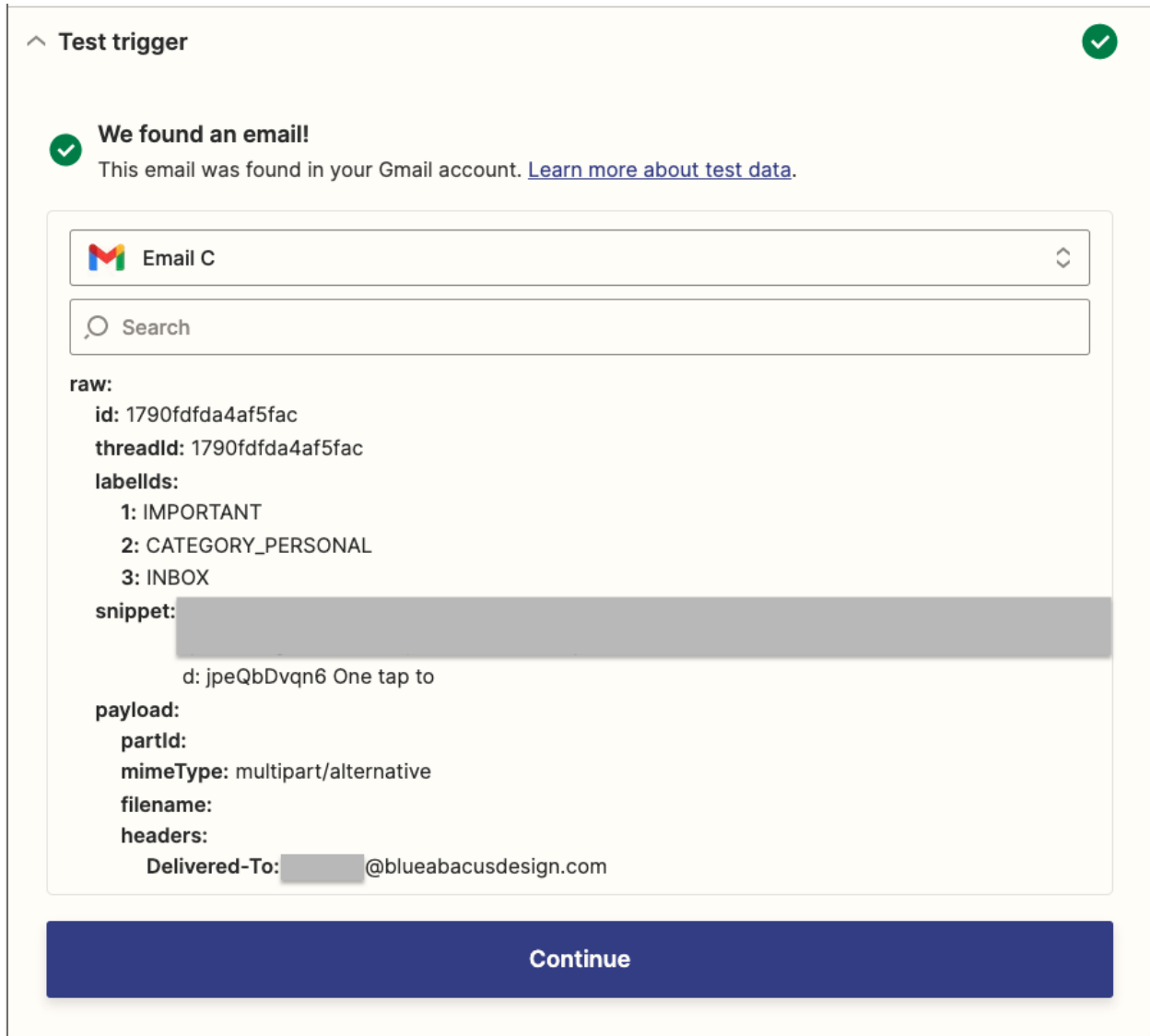


Figure 27—Success message and continue action set up.

## Setting Up RingCentral Action

**Step 1:** Select RingCentral Action App.

Search for RingCentral App and select in the action step as shown in the screen Figure 28.

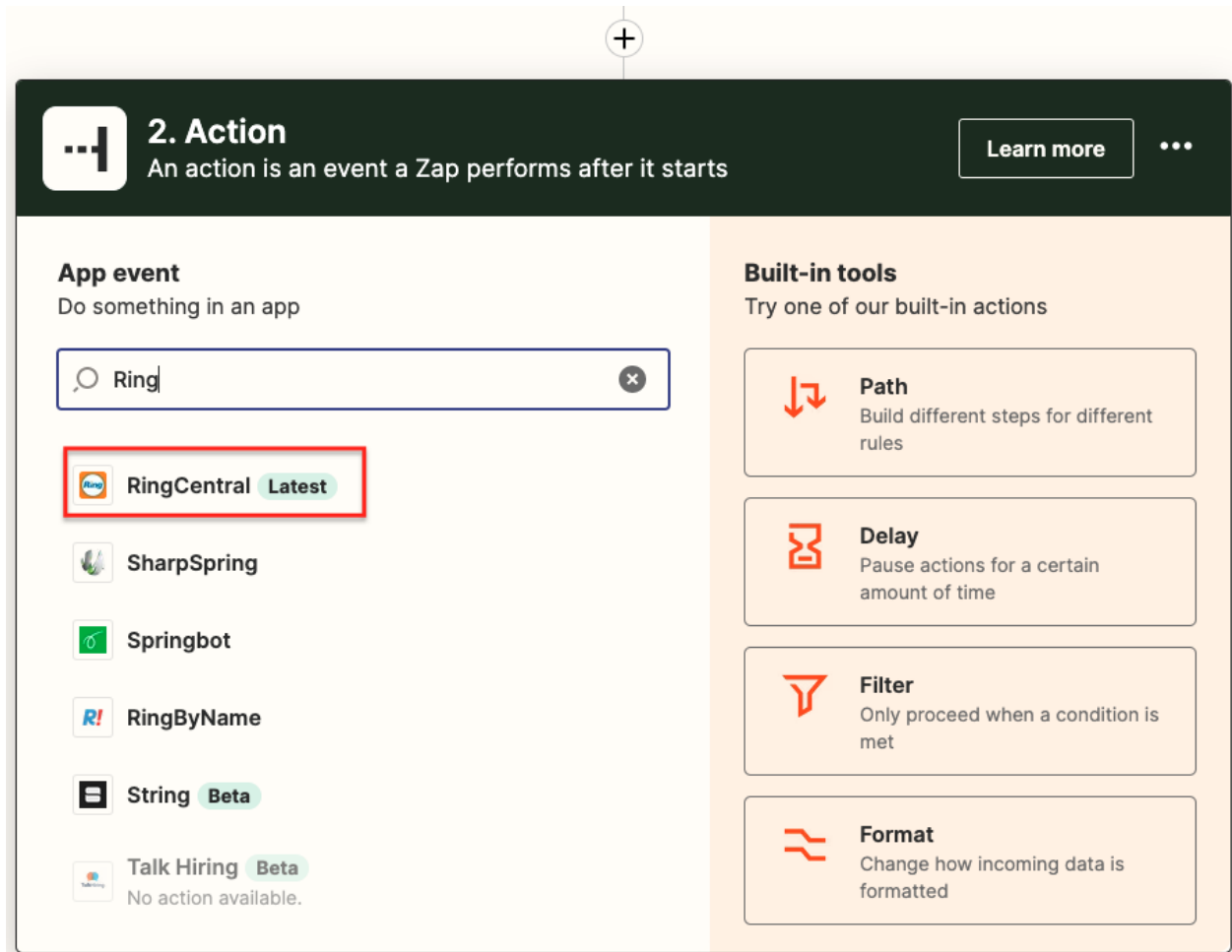


Figure 28—Find RingCentral App in the action set up.

**Step 2:** Select RingCentral action event.

Choose any of the RingCentral action events, this step we will be selecting Send SMS action as shown in figure 29.

So whenever the trigger executes a SMS is sent from your RingCentral account.



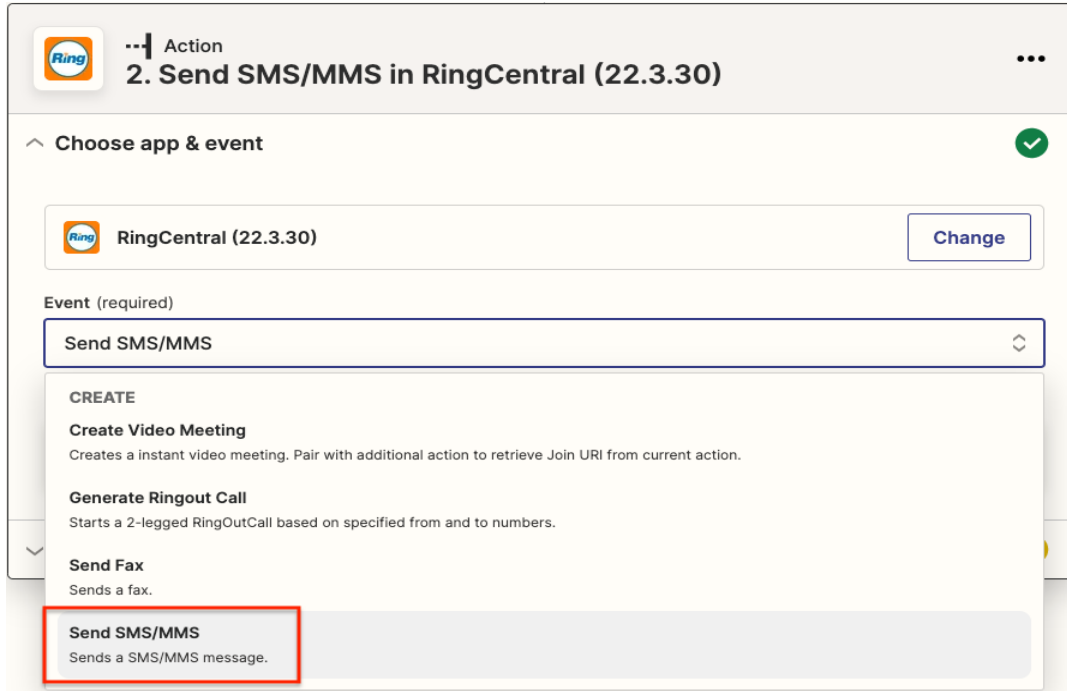


Figure 29—Select RingCentral Send SMS/MMS action.

**Step 3:** Continue to choose your RingCentral account.

In this step choose your RingCentral account from the list or connect a new account using the button “+ Connect a new account” as shown in figure 30.

Ring  
Action  
2. Send SMS in RingCentral

✓ Choose app & event

⚠ Choose account

RingCentral account: (required)

Choose an account...

Choose...

Search

RingCentral [redacted]@ringcentral.com  
(used in 1 Zap) Personal

+ Connect a new account

Figure 30—Select RingCentral account or connect new account.

**Step 4:** Set up action.

Provide all the required fields to complete the action set up and continue to test the action as shown in figure 31.

^ Set up action

Type

SMS

Phone Number From (required)

DirectNumber +

Phone Number To (required)

Akhilesh Google

Text (required)

1. From Name: Akhilesh Personal

1. Result: Missed

1. Type: Voice

1. Action: Phone Call

Refresh fields

Continue

Figure 31—Setting up the action by providing required fields.

Here we are using the subject parameter in the Text field, so whenever there is a new email in the mailbox(Inbox) the subject of the email is sent as SMS to the Phone Number To mentioned in the RingCentral action set up.

**Step 5:** Test action and continue to publish the zap.

In this step we test the action and publish the zap to turn it on as shown in figure 32.

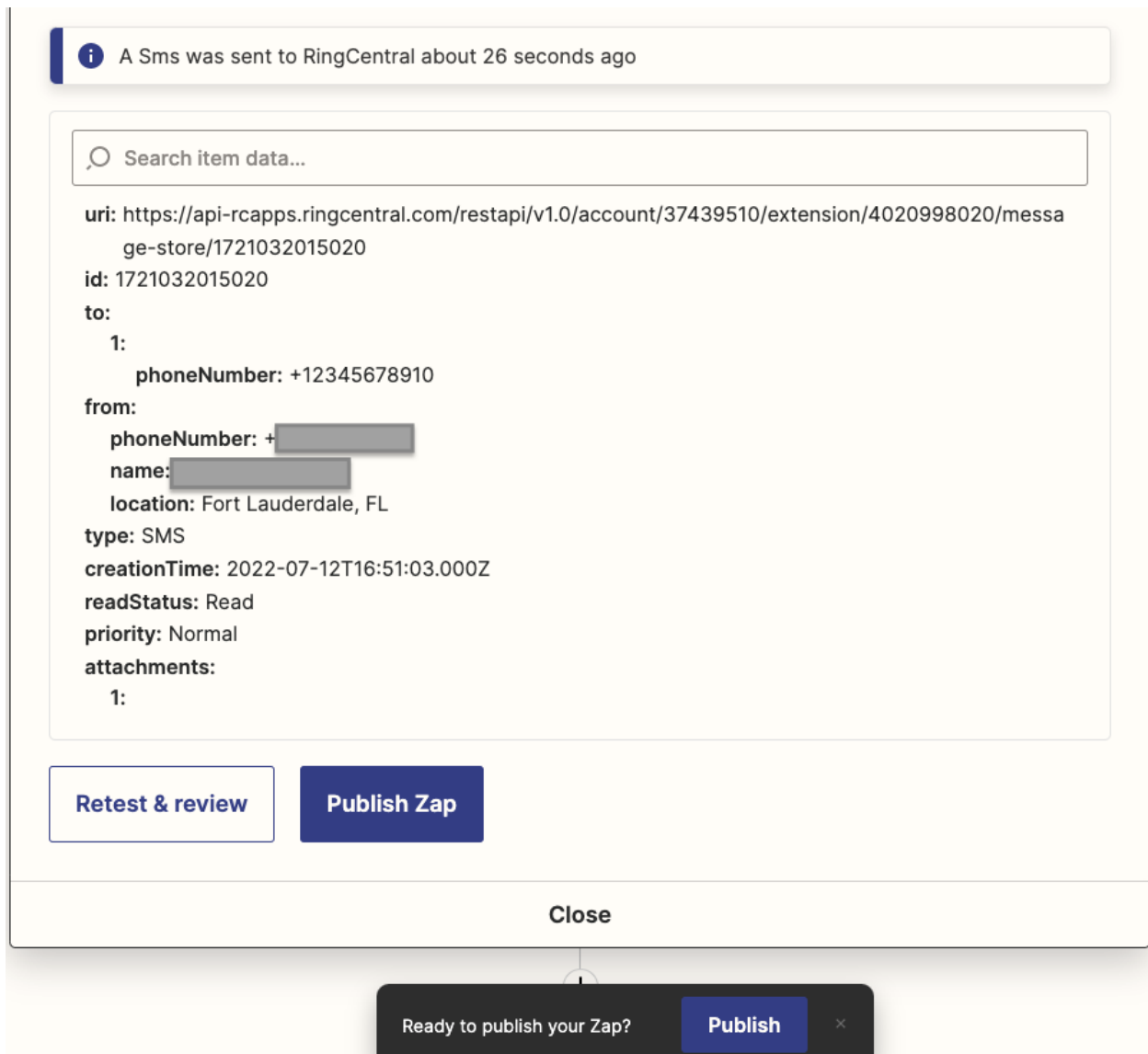


Figure 32—Test Action and Publish Zap.

At last publish and turn on the zap as discussed in previous steps.

Similarly the other actions of RingCentral can be used by combining with different applications using Zapier support.