

RingCentral for Zendesk

Administrator Guide



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Introduction

About RingCentral for Zendesk

RingCentral for Zendesk provides seamless integration between the Zendesk application and your RingCentral services to enable improved customer retention, greater agent productivity, and advanced business processes.

It offers these features:

Complete cloud-based app cloud integration

- Use your browser on any platform (Windows®, Mac®); no software installation is needed.
- Make or receive calls through the RingCentral phone system, directly from your account within Zendesk.

Increased call efficiency

- With simple click-to-dial from within Zendesk, you can spend more time servicing clients and less time dialing.
- Save time by eliminating misdials.

Enhanced streamline of your customer interaction

- Incoming callers are instantly matched to existing client records, which are automatically displayed.
- Tickets are created automatically when a call arrives.

About this Guide

This guide is specifically designed for administrators of RingCentral for Zendesk. This guide is not intended for Zendesk 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 Zendesk instance to enable users of RingCentral for Zendesk .

About Zendesk

Zendesk is customer service software based in the cloud. It features a simple interface that will feel familiar to users. To enhance the customer experience, Zendesk integrates other cloud based services such as Salesforce, Facebook and Twitter.

Zendesk includes ticketing, self-service options, and the most-needed customer support features.

Zendesk streamlines customer support with time-saving tools such as ticket views, triggers, and automations. This helps you get straight to what matters most—better customer service and more meaningful conversations.

Setting up RingCentral for Zendesk

To set up RingCentral for Zendesk:

1. Sign in as an administrator to your RingCentralfor Zendesk and click the **Admin** icon in the navigation bar. (Figure 1)
2. Under Apps, select Marketplace, and search for **RingCentral**. (Figure 2, next page)
3. On the Marketplace page, click **on Free** and then select the account you would like to install the app in, **and click Install**. (Figure 3, next page)

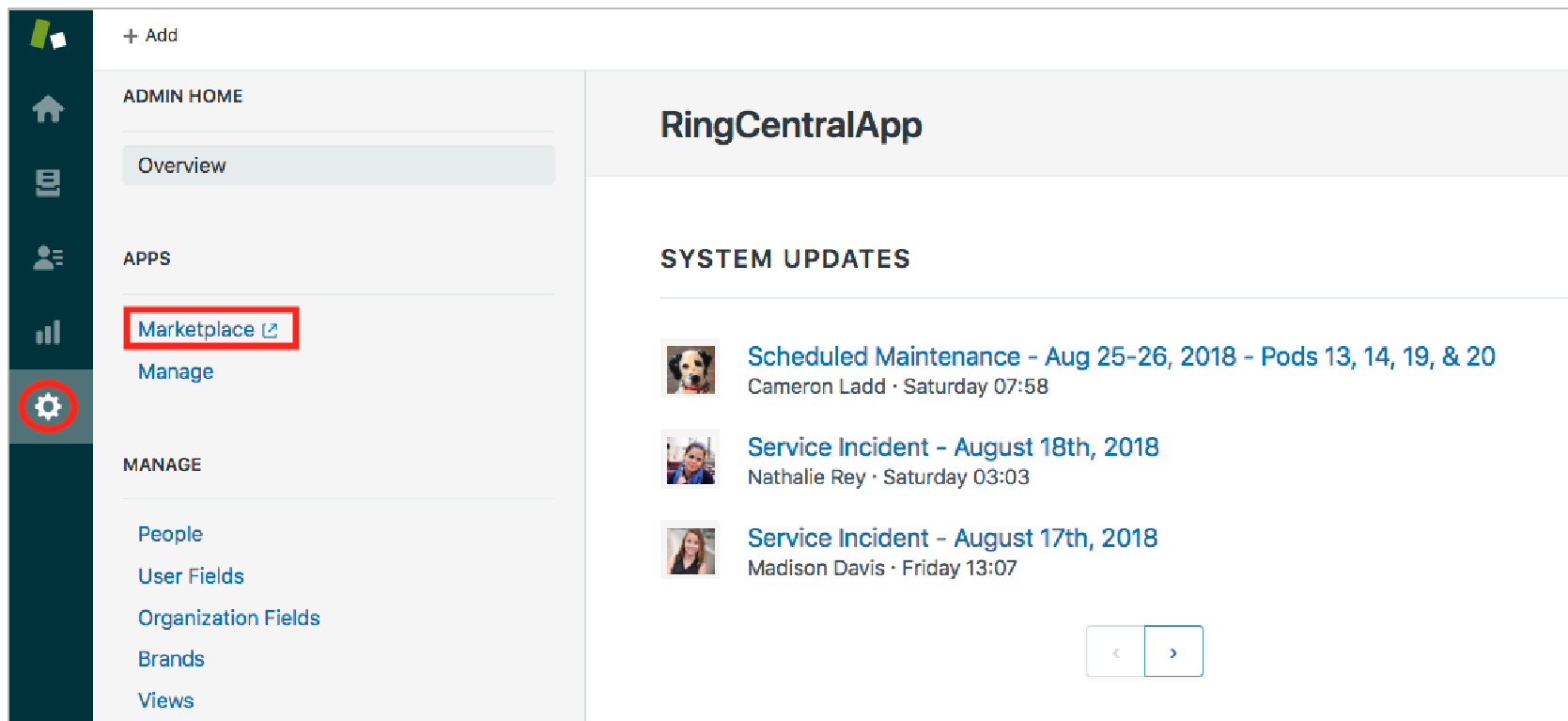


Figure 1

Apps

Increase agent productivity and streamline workflows

Filters

Keywords

RingCentral x


Categories

- Contact Center 7
- Messaging 3
- AI and Bots 1
- Knowledge and Content Management 1
- Video 1

1 - 9 of 9 apps

"RingCentral" Clear all filters


Sort by: Most relevant v



RingCentral

Integration with RingCentral phone system


★ ★ ★ Free to install



RingCentral SMS by OAppS

RingCentral SMS/MMS & Bulk SMS is now available as a channel in Zendesk.

\$20.00 per agent, per month



RingCentral CTI Integration by CDC Software

Enable RingCentral Telephony and Zendesk integration with the CDC Platform

Free to install

Figure 2

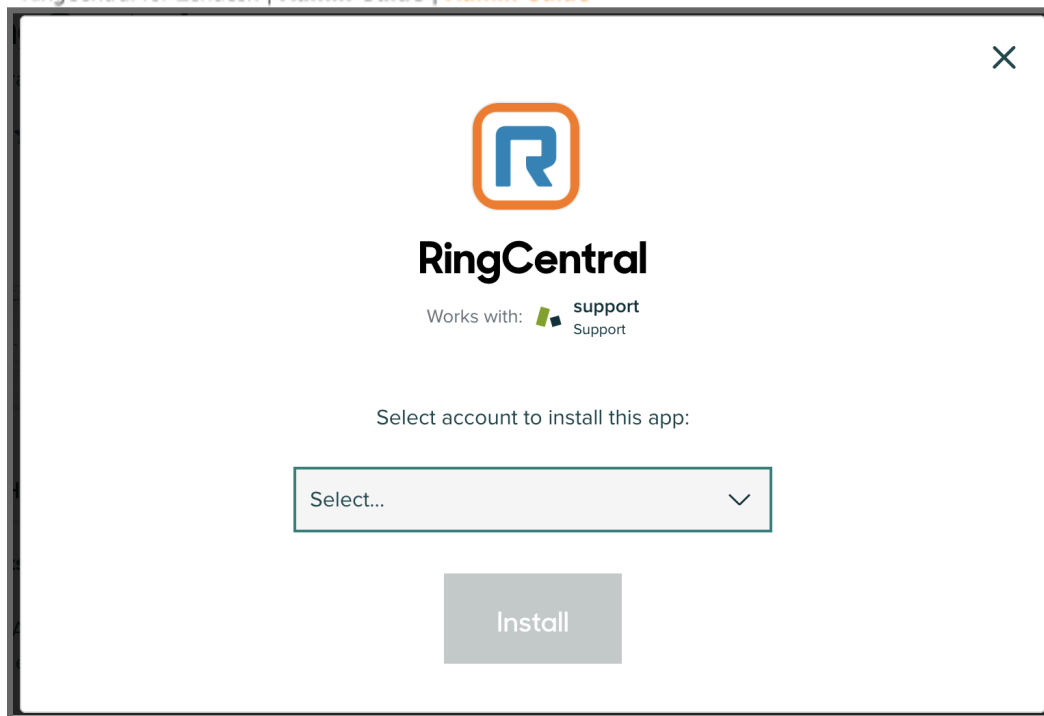


Figure 3

4. Clicking **Install** will take you back to the Admin page where you can fill in installation details. (Figure 3 above)
5. Click **Install** to install the RingCentral app to your Zendesk account. (Figure 4)

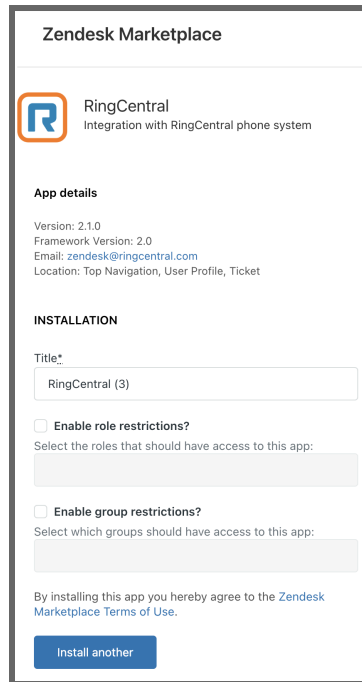


Figure 4

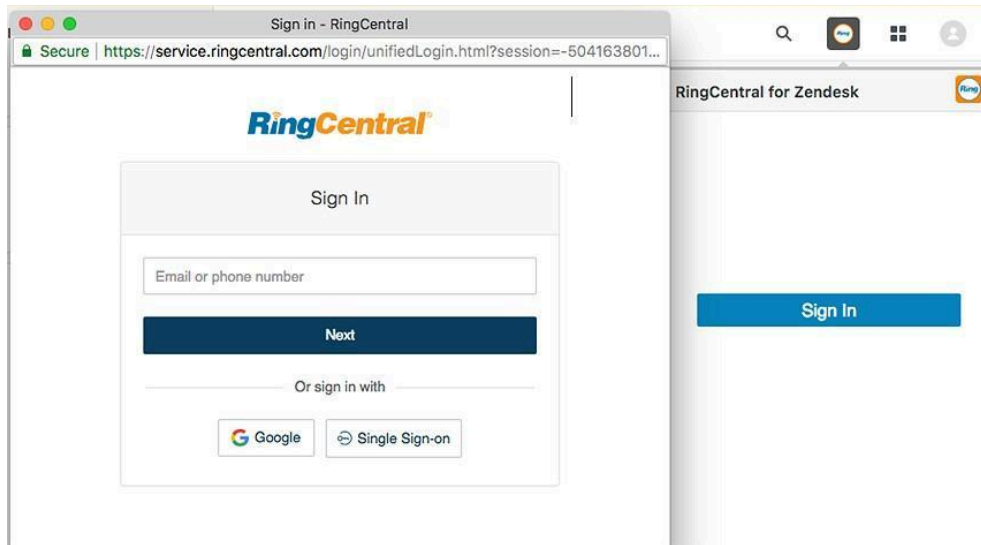


Figure 5

6. Refresh your Zendesk login session. The RingCentral app icon shows at the top right hand corner, provided you did not disable the app for your own profile in the previous steps. Click the RingCentral app icon; the RingCentral login screen launches within your Zendesk frame. Enter your RingCentral login credentials and click **Sign In**. (Figure 5 above)
7. You can now use RingCentral for Zendesk to make and receive calls. (Figure 6)

The screenshot displays the RingCentral for Zendesk interface. At the top, there are tabs for 'Outbound call to +919... #753', 'Ashish', 'My Printer is on fire Voice recording attached', and 'Calls aren't working Voice recording attached'. Below the tabs, the left sidebar contains navigation icons for Home, People, Recent, and Settings. The main content area shows a ticket titled 'Calls aren't working' with a status of 'Via outgoing phone call'. The ticket details include a requester 'User+16503530591', an assignee 'Support/John Smith', and a call log entry for 'John Smith' with details: 'Call to: +1 (650) 353-0591', 'Call from: +1 (909) 296-4141', 'Time of call: April 2, 2024 at 5:05:37 PM UTC', and 'Called by: Dan Buck'. Below the call log, there is a 'Call recording' player showing a duration of '0:00 / 0:40'. The bottom of the interface features a 'Public reply' section with a 'To' field set to 'User+16503530591' and a 'Submit as Open' button.

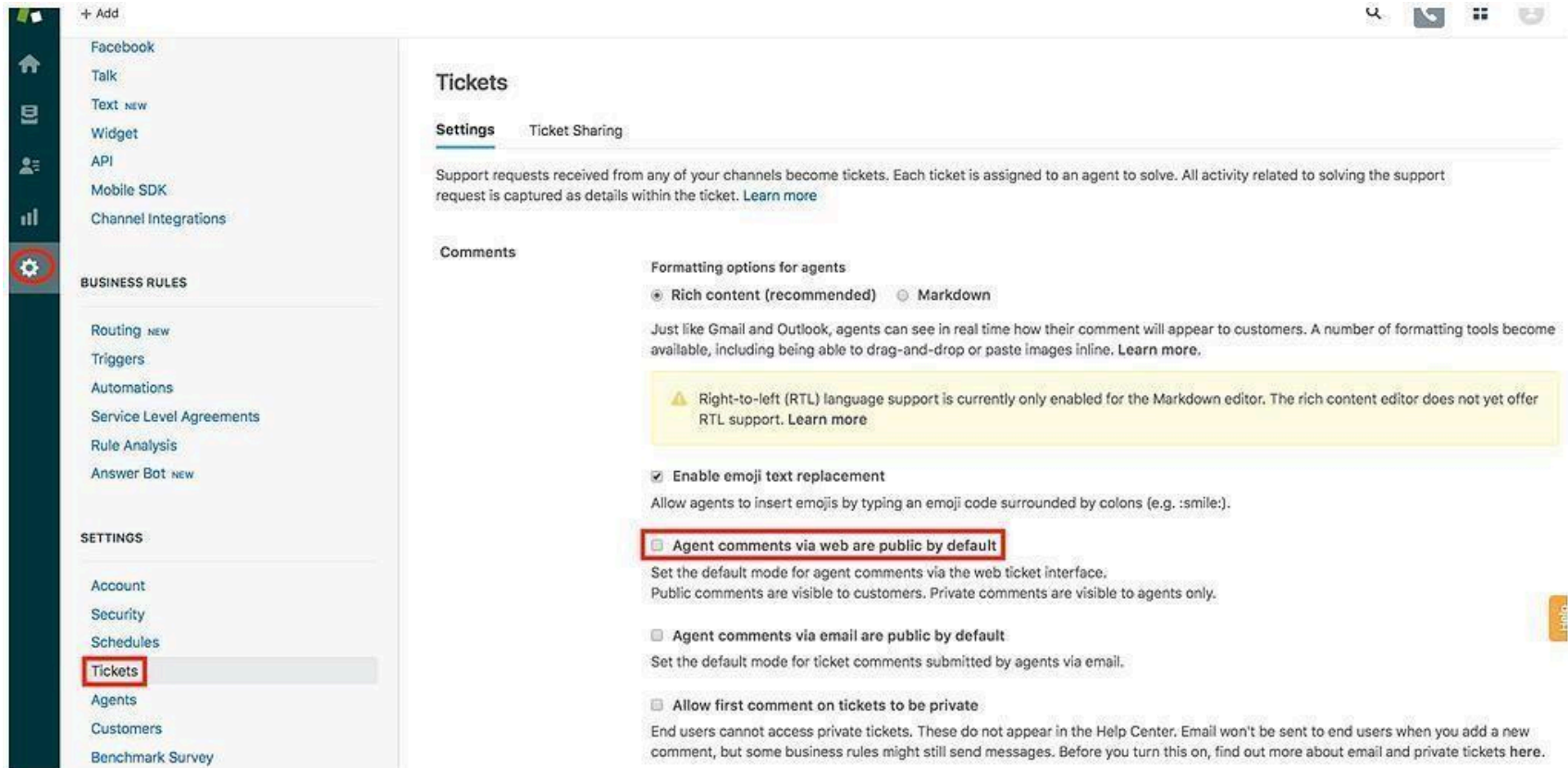
Figure 6

Create Ticket Starting with Private Note

A new Zendesk ticket is created by the RingCentral app right after a Zendesk agent accepts a call from a customer. Typically, support organizations want the first comment entered by Zendesk Agents on these tickets to be set to private automatically.

You can set this feature within Zendesk:

1. Sign in as an administrator to your RingCentral for Zendesk and click the Admin icon in the navigation bar.
2. Select Tickets under **SETTINGS**.
3. Uncheck **Agent comments via web are public by default**. (Figure 7)
4. Please logout and log back in to make the changes be effective.



The screenshot displays the Zendesk Admin Center interface. On the left, the 'Settings' menu is visible, with 'Tickets' highlighted. The main content area shows the 'Comments' section under the 'Tickets' heading. The 'Comments' section includes a 'Formatting options for agents' subsection with a radio button for 'Rich content (recommended)' selected. Below this, there is a yellow warning box stating: 'Right-to-left (RTL) language support is currently only enabled for the Markdown editor. The rich content editor does not yet offer RTL support. Learn more'. Further down, the 'Agent comments via web are public by default' checkbox is highlighted with a red box. Other settings include 'Enable emoji text replacement', 'Agent comments via email are public by default', and 'Allow first comment on tickets to be private'.

Creating Tickets from Voicemails, Missed Calls, Faxes or Text Messages

It is possible to create Zendesk tickets for all the voicemail messages, missed calls, texts or faxes that you get on your RingCentralphone. This section describes how to enable this feature.

Log into your RingCentral account at <http://service.ringcentral.com> by entering your RingCentral phone number and password. Now go under **Settings** and drop down "Messages & Notifications"; click **Edit** under **Settings**. (Figure 8)

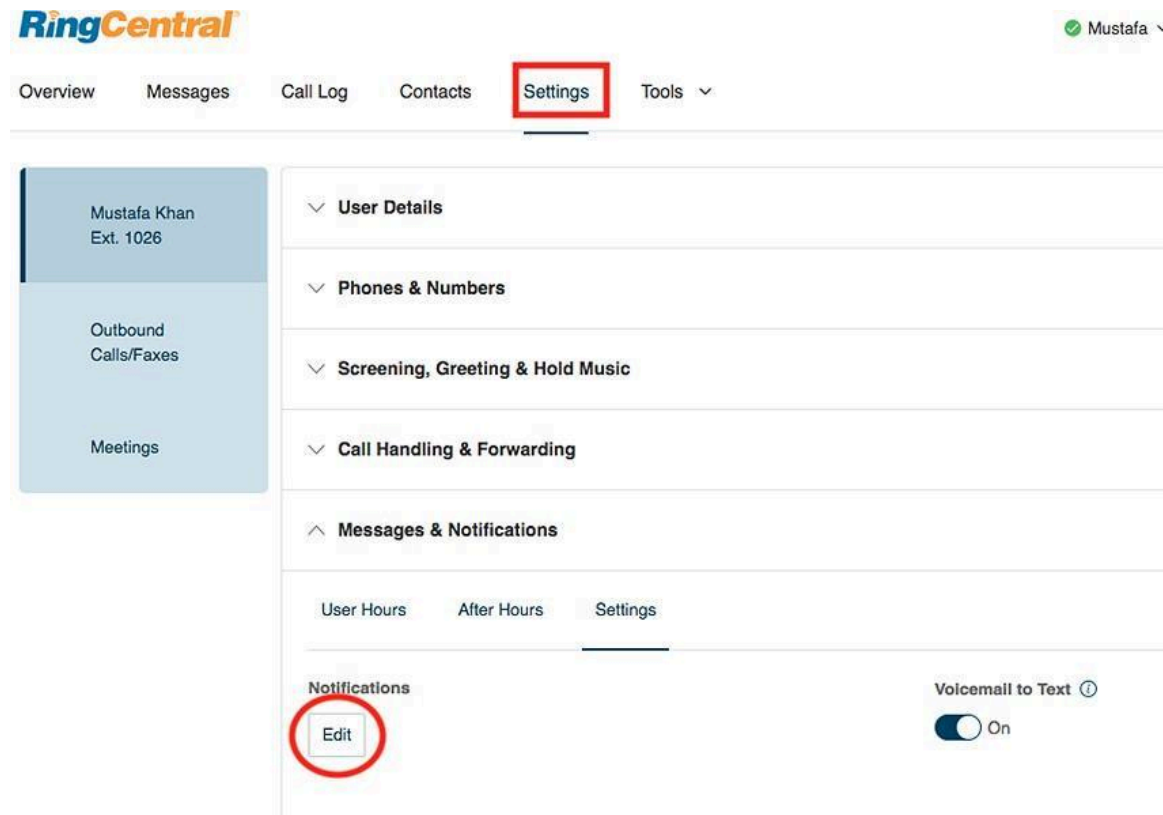


Figure 8

Upon Clicking **Edit**, it will pop up another window that shows Notifications settings.

Notifications

×

Basic Settings

	By Email	By SMS
Voicemail Messages	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Received Faxes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Missed Calls	<input type="checkbox"/>	<input type="checkbox"/>
Fax Transmission Results	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Received Text Messages	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Send Notifications to

Email

mustafa.khan@ringcentral.com

Phone Number

Select Carrier

4085551212

+ Add

My carrier is not listed ⓘ

Cancel

Save

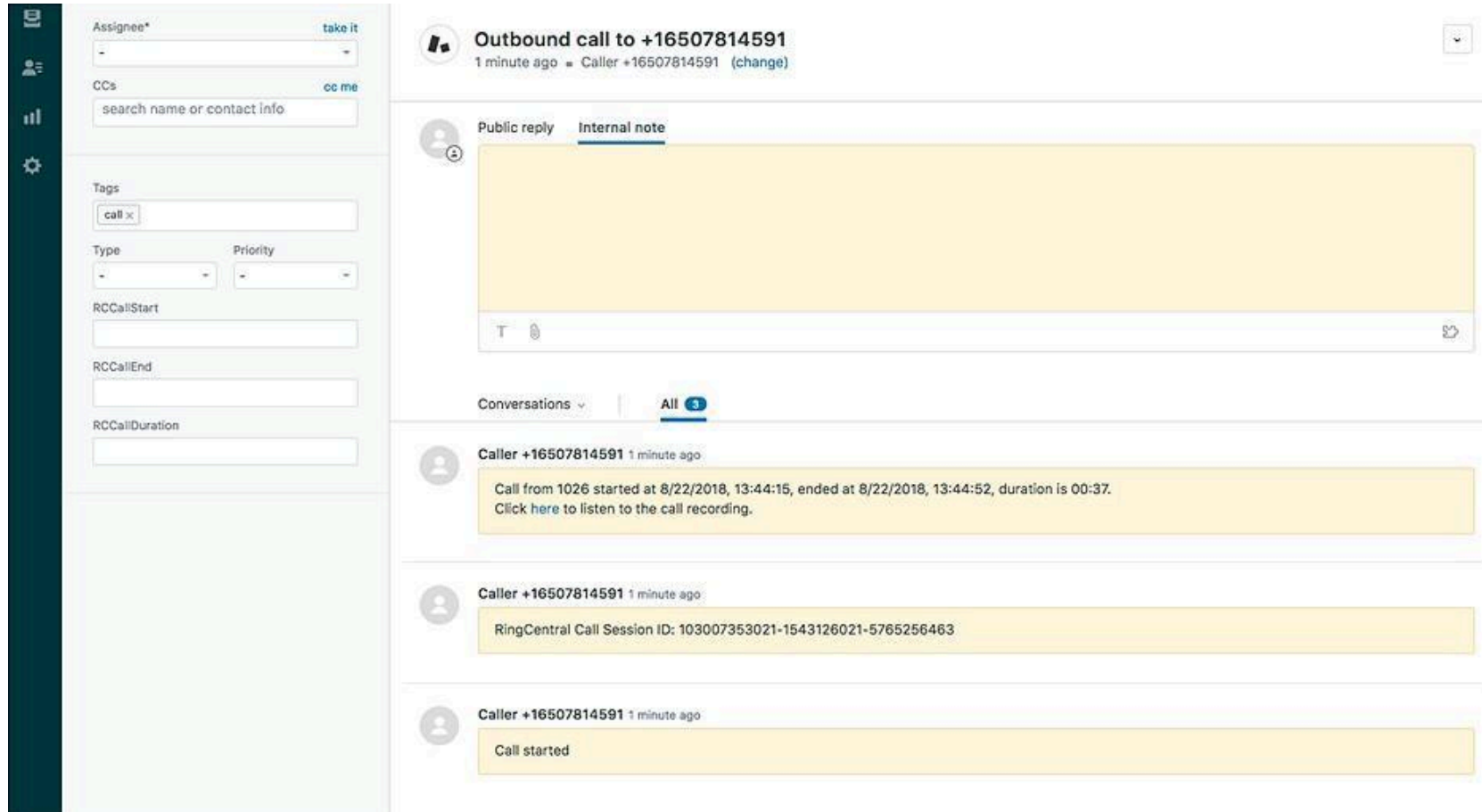
Figure 9

Select all the applicable checkboxes for the features that you want to create tickets for. Enter your Zendesk support email address. It should be something like support@yourcompanyname.zendesk.com.

When a caller leaves a voicemail on your RingCentral phone, an email is sent to the address specified in the settings above.

After Zendesk receives this email, it converts this email in to a Zendesk Ticket for you. Similar tickets will be created for missed calls, faxes, call recordings or text messages if you have enabled notifications for those items.

Once you log into Zendesk you will see these new tickets assigned to the group the email is associated with. If the ticket was created with a voicemail, the newly created Zendesk ticket will contain a recording of the voicemail with which you can listen to the message the caller has left.



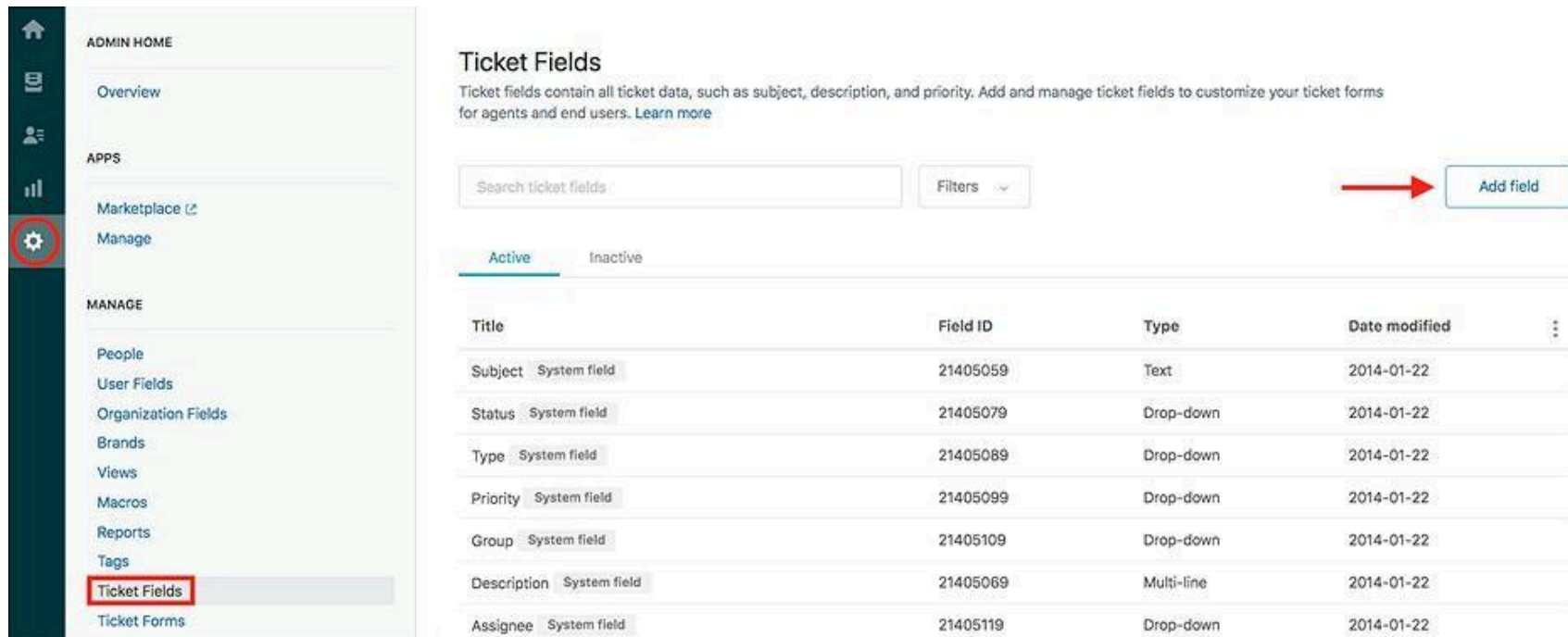
The screenshot displays a Zendesk ticket interface. On the left is a sidebar with navigation icons. The main content area shows a ticket titled "Outbound call to +16507814591" with a timestamp of "1 minute ago" and a link to "change" the caller information. Below the title are tabs for "Public reply" and "Internal note". A large yellow rectangular area is present under the "Internal note" tab. Below this, there is a "Conversations" section with a dropdown menu set to "All" and a count of "3". The first conversation entry is from "Caller +16507814591" with a timestamp of "1 minute ago", containing the text: "Call from 1026 started at 8/22/2018, 13:44:15, ended at 8/22/2018, 13:44:52, duration is 00:37. Click [here](#) to listen to the call recording." The second conversation entry is also from "Caller +16507814591" with a timestamp of "1 minute ago", containing the text: "RingCentral Call Session ID: 103007353021-1543126021-5765256463". The third conversation entry is from "Caller +16507814591" with a timestamp of "1 minute ago", containing the text: "Call started".

Figure 10

Call Data

Zendesk administrators can add this feature that can be used to add call start time, end time and call duration on every ticket that are created via RingCentral for Zendesk. Although this feature is optional but with a very small effort the data collected by this feature can be used to develop very powerful reports for your company.

Go to the Admin console and find Ticket Fields under Manage. Now on the top right side corner, click on Add Field to add a custom field link. (Figure 11)



ADMIN HOME

- Overview

APPS

- Marketplace [↗](#)
- Manage

MANAGE

- People
- User Fields
- Organization Fields
- Brands
- Views
- Macros
- Reports
- Tags
- Ticket Fields**
- Ticket Forms

Ticket Fields

Ticket fields contain all ticket data, such as subject, description, and priority. Add and manage ticket fields to customize your ticket forms for agents and end users. [Learn more](#)

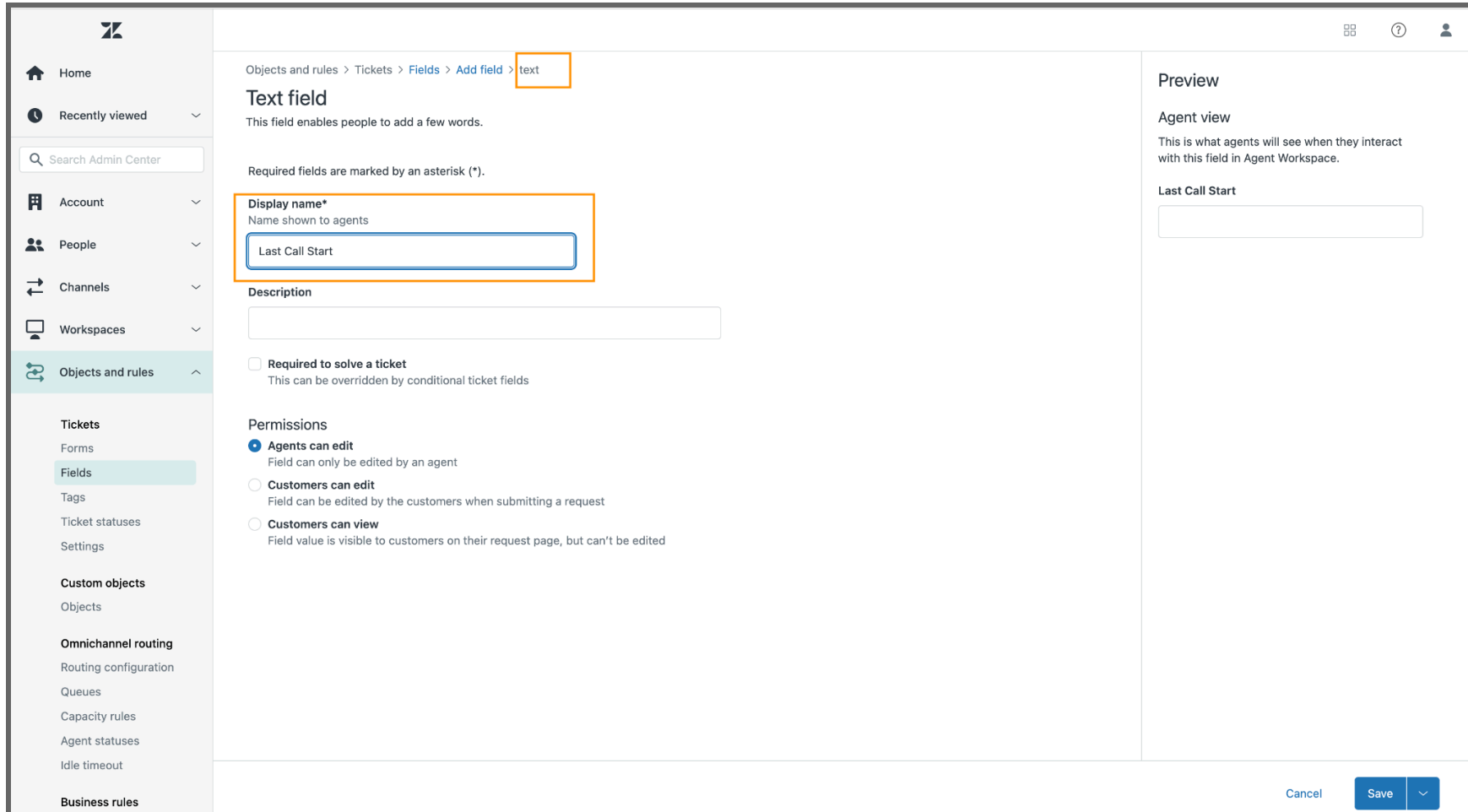
Search ticket fields Filters

Active Inactive

Title	Field ID	Type	Date modified	
Subject System field	21405059	Text	2014-01-22	
Status System field	21405079	Drop-down	2014-01-22	
Type System field	21405089	Drop-down	2014-01-22	
Priority System field	21405099	Drop-down	2014-01-22	
Group System field	21405109	Drop-down	2014-01-22	
Description System field	21405069	Multi-line	2014-01-22	
Assignee System field	21405119	Drop-down	2014-01-22	

Figure 11

Select a Text and enter a new text field for “Last Call Start” in the screen below and click **Save**. Do not mark any of these fields as required. (Figure 12)



Objects and rules > Tickets > Fields > Add field > text

Text field

This field enables people to add a few words.

Required fields are marked by an asterisk (*).

Display name*
Name shown to agents

Last Call Start

Description

☐ **Required to solve a ticket**
This can be overridden by conditional ticket fields

Permissions

- ☒ **Agents can edit**
Field can only be edited by an agent
- ☐ **Customers can edit**
Field can be edited by the customers when submitting a request
- ☐ **Customers can view**
Field value is visible to customers on their request page, but can't be edited

Preview

Agent view

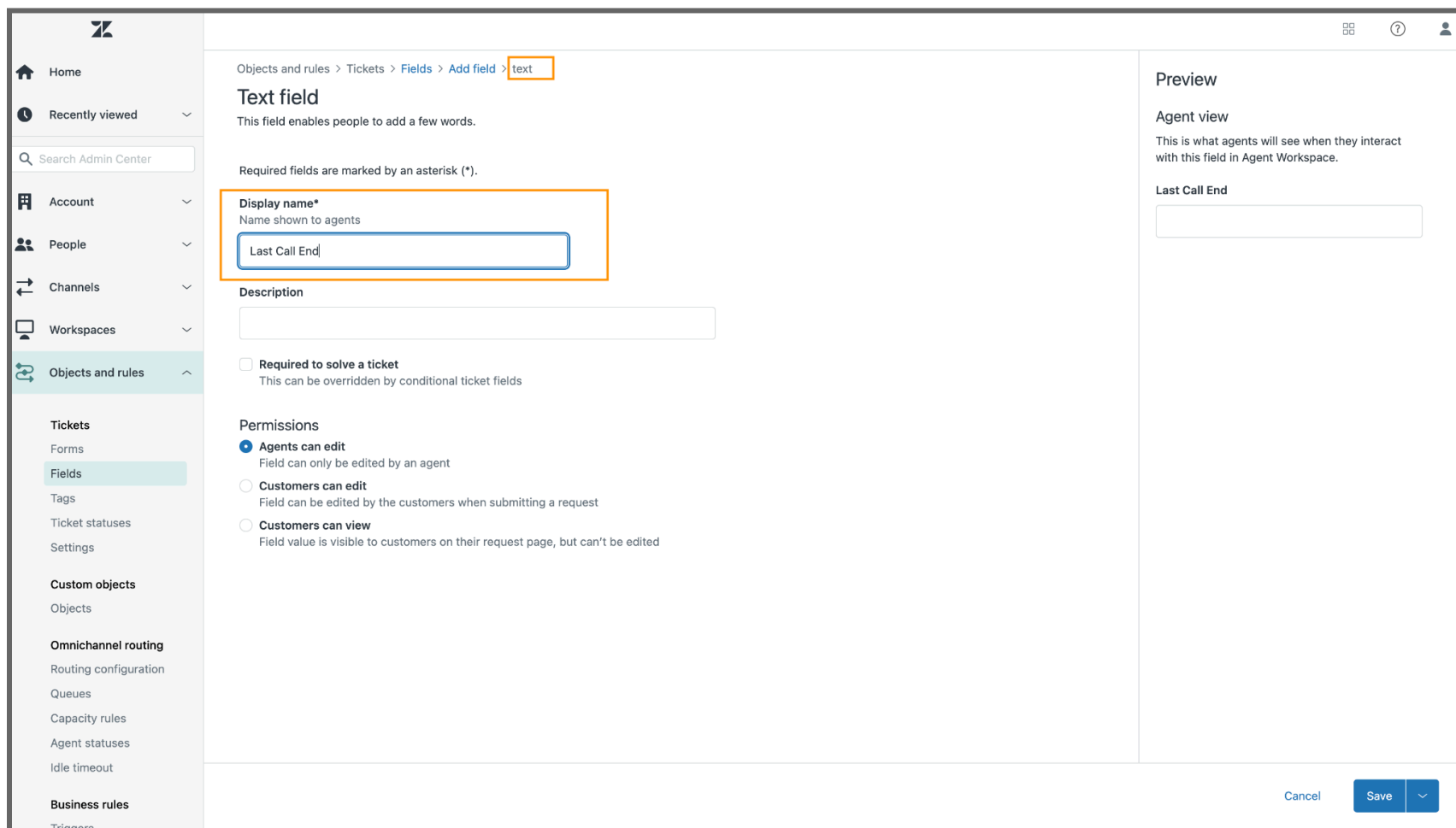
This is what agents will see when they interact with this field in Agent Workspace.

Last Call Start

Cancel Save

Figure 12

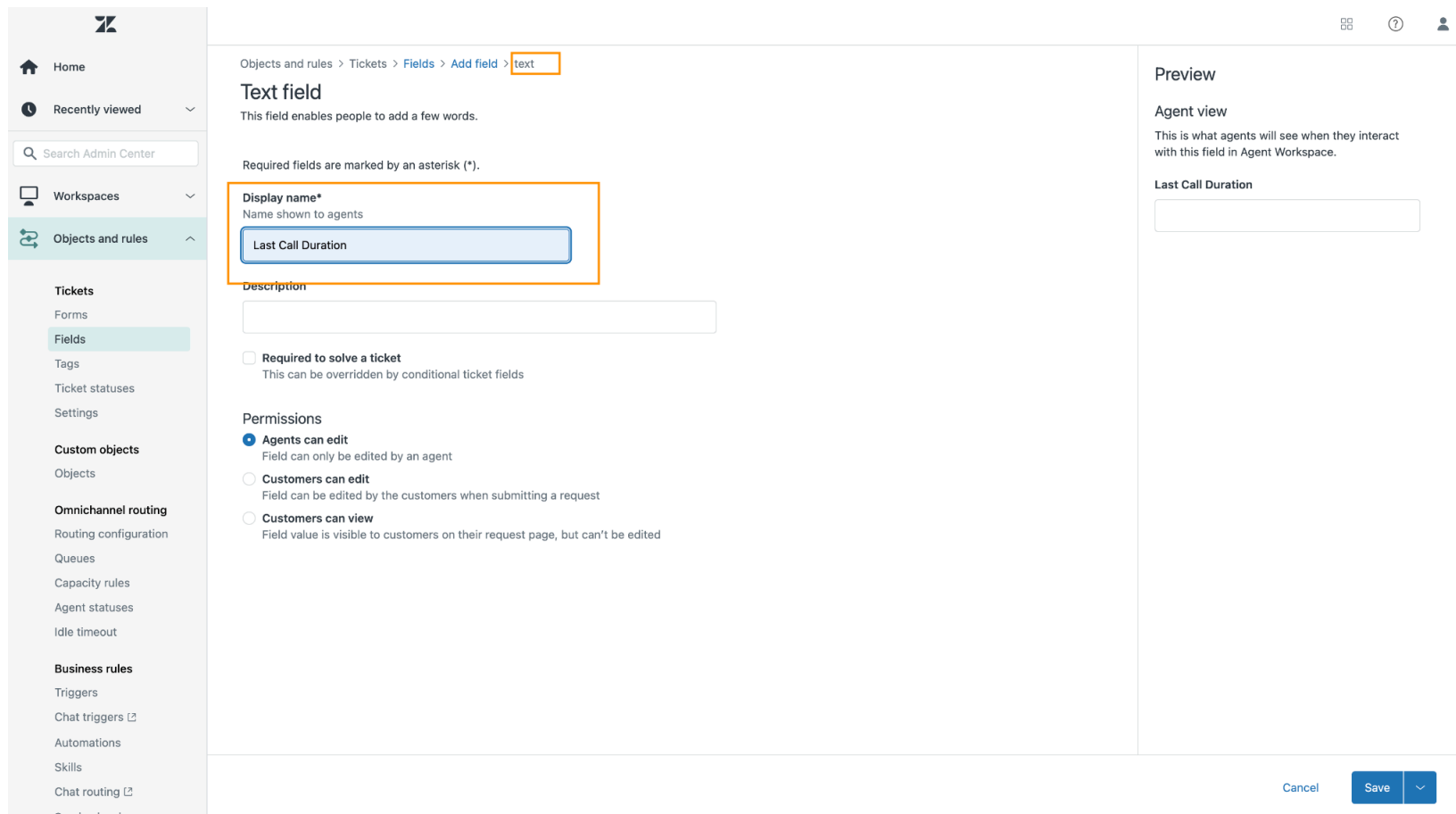
Add another Text field with the name of “Last Call End” and click **Save**. Do not mark any of these fields as required. (Figure 13)



The screenshot shows the 'Add field' configuration page in the RingCentral Admin Center. The breadcrumb trail at the top reads: Objects and rules > Tickets > Fields > Add field > text. The main heading is 'Text field', with a subtext: 'This field enables people to add a few words.' Below this, a note states: 'Required fields are marked by an asterisk (*).' The 'Display name*' section, which is highlighted with an orange box, contains a text input field with the value 'Last Call End' and the subtext 'Name shown to agents'. The 'Description' section has an empty text input field. The 'Required to solve a ticket' checkbox is unchecked, with the subtext 'This can be overridden by conditional ticket fields'. The 'Permissions' section has three options: 'Agents can edit' (selected with a blue dot), 'Customers can edit' (unselected), and 'Customers can view' (unselected). The 'Agents can edit' option has the subtext 'Field can only be edited by an agent'. The 'Customers can edit' option has the subtext 'Field can be edited by the customers when submitting a request'. The 'Customers can view' option has the subtext 'Field value is visible to customers on their request page, but can't be edited'. On the right side, there is a 'Preview' section titled 'Agent view' with the text 'This is what agents will see when they interact with this field in Agent Workspace.' Below this, the field name 'Last Call End' is shown above an empty input field. At the bottom right, there are 'Cancel', 'Save', and a dropdown arrow buttons.

Figure 13

Now choose Numeric from the field section and finally add a text field Last Call Duration and click **Save**. Do not mark any of these fields as required. (Figure 14)



Objects and rules > Tickets > Fields > Add field > text

Text field

This field enables people to add a few words.

Required fields are marked by an asterisk (*).

Display name*
Name shown to agents

Last Call Duration

Description

☐ **Required to solve a ticket**
This can be overridden by conditional ticket fields

Permissions

☒ **Agents can edit**
Field can only be edited by an agent

☐ **Customers can edit**
Field can be edited by the customers when submitting a request

☐ **Customers can view**
Field value is visible to customers on their request page, but can't be edited

Preview

Agent view

This is what agents will see when they interact with this field in Agent Workspace.

Last Call Duration

Cancel Save

Figure 14

Once the fields are created you should see them on Zendesk Ticket fields screen as custom fields. (Figure 15)

Objects and rules > Tickets > Fields

Fields

Add fields to get more details about tickets. You can arrange these fields for agents and customers in ticket forms. [Learn about ticket fields](#)

Actions Add field

Filter Active Clear filters

Display name	Field ID	Type	Date modified	Tags	
Assignee	360055761153	Drop-down	11/25/2020	Standard field	Edit
Description	360055761053	Multi-line	11/25/2020	Standard field	Edit
Group	360055761133	Drop-down	11/25/2020	Standard field	Edit
Last Call Duration	1900001415825	Text	8/25/2021	Custom field	⋮
Last Call End	1500009709341	Text	8/25/2021	Custom field	⋮
Last Call Start	1900001415665	Text	8/25/2021	Custom field	⋮
Priority	360055761113	Drop-down	11/25/2020	Standard field	⋮
RCCallDuration	1500016027741	Text	7/23/2023	Custom field	⋮
RCCallEnd	1500016086062	Text	7/23/2023	Custom field	⋮
RCCallStart	1500016027701	Text	7/23/2023	Custom field	⋮
Status	360055761073	Drop-down	11/25/2020	Standard field	Edit
Subject	360055761033	Text	11/25/2020	Standard field	⋮
Type	360055761093	Drop-down	11/25/2020	Standard field	⋮

Figure 15

Turn ON Agent Workspace

You must turn ON the Agent Workspace for the agents to see the Voice comment object in the tickets. Please follow the steps below:

1. Go to the Admin Center.
2. Select Workspaces -> Agent Workspace
3. Check the "Turn on Agent Workspace"

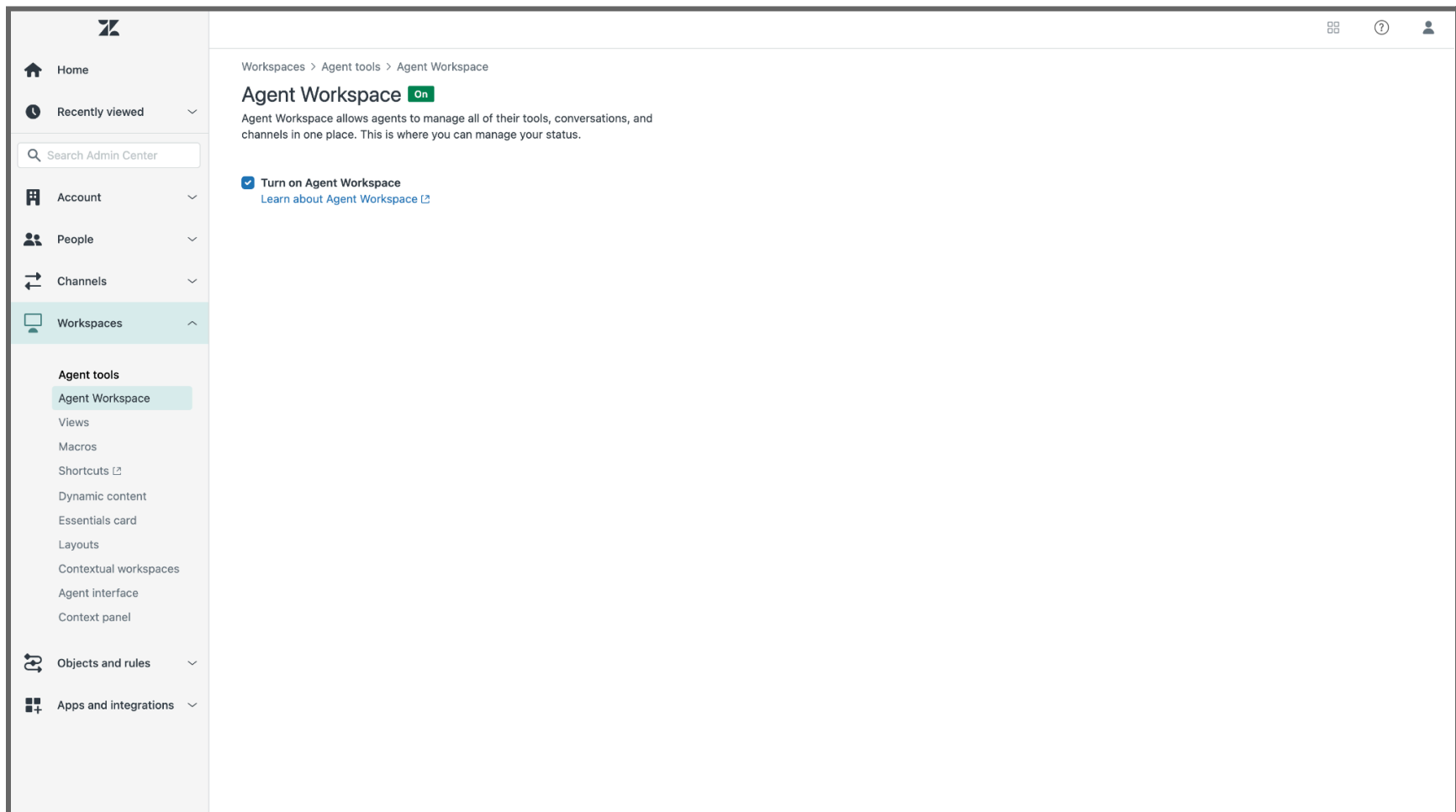


Figure 16

Troubleshooting

Q: I would like to disable this feature for now.

A: You cannot remove individual users from RingCentral for Zendesk; you can change the application settings to remove user profiles.

Q: Which browsers are supported?

A: The following browsers are supported by RingCentral for Zendesk:

- Internet Explorer 11 and higher (Windows XP, 7, 8 or higher)
- Firefox 37 and higher (Windows, Mac)
- Chrome 41 and higher (Windows, Mac)
- Safari 8 and higher (Mac)

Q: On logging into the RingCentral for Zendesk, users are getting this error message: "Your RingCentral edition does not support Zendesk Integration – please call your RingCentral account representative to upgrade your RingCentral edition." What does that mean?

A: Not all RingCentral editions have the ability to use the Zendesk integration. You may have to upgrade your account to be able to use this feature. Please contact your RingCentral representative for more information.