RingCentral University

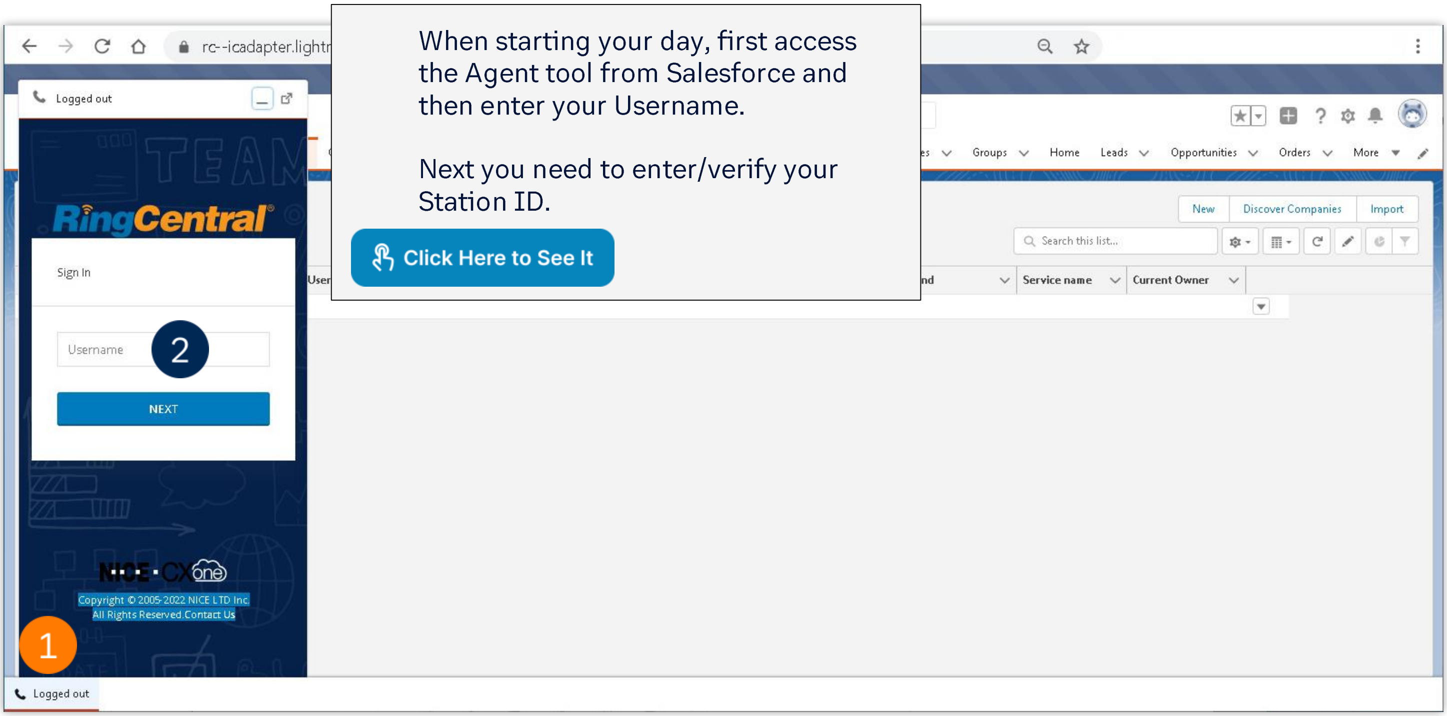
Salesforce Agent – Fully Integrated Lightning Experience
Interactive Quick Guide

Instructions

Use this Interactive Quick Guide to explore the basics of the Salesforce Agent (Fully Integrated Lightning Experience).

1. Use Click Here to See It and other links to explore various functions and screens.
2. Use Go Back and Explore More to return to the previous selection.

Logging In – Username



When starting your day, first access the Agent tool from Salesforce and then enter your Username.

Next you need to enter/verify your Station ID.

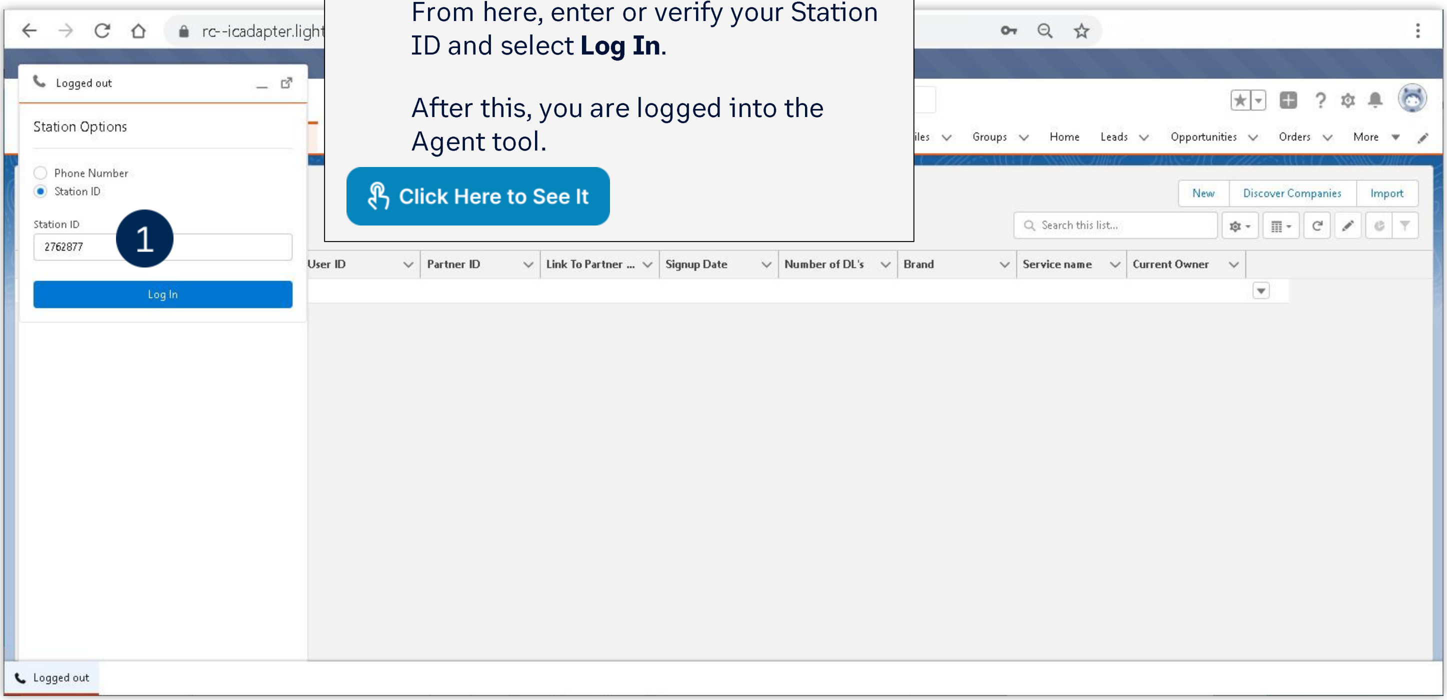
Click Here to See It

Logging In – Station ID

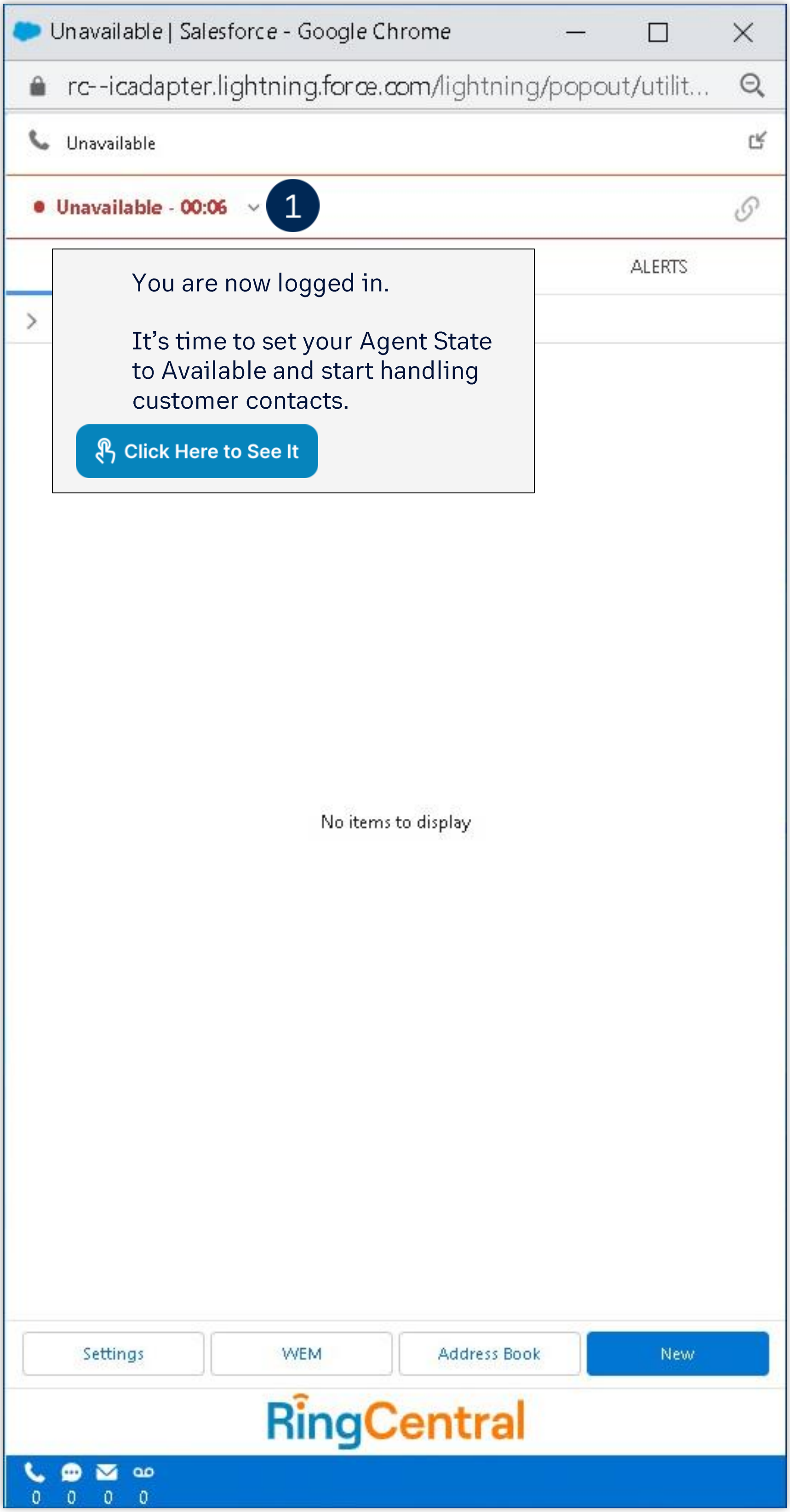
From here, enter or verify your Station ID and select **Log In**.

After this, you are logged into the Agent tool.

Click Here to See It



Initial Log In (Unavailable)

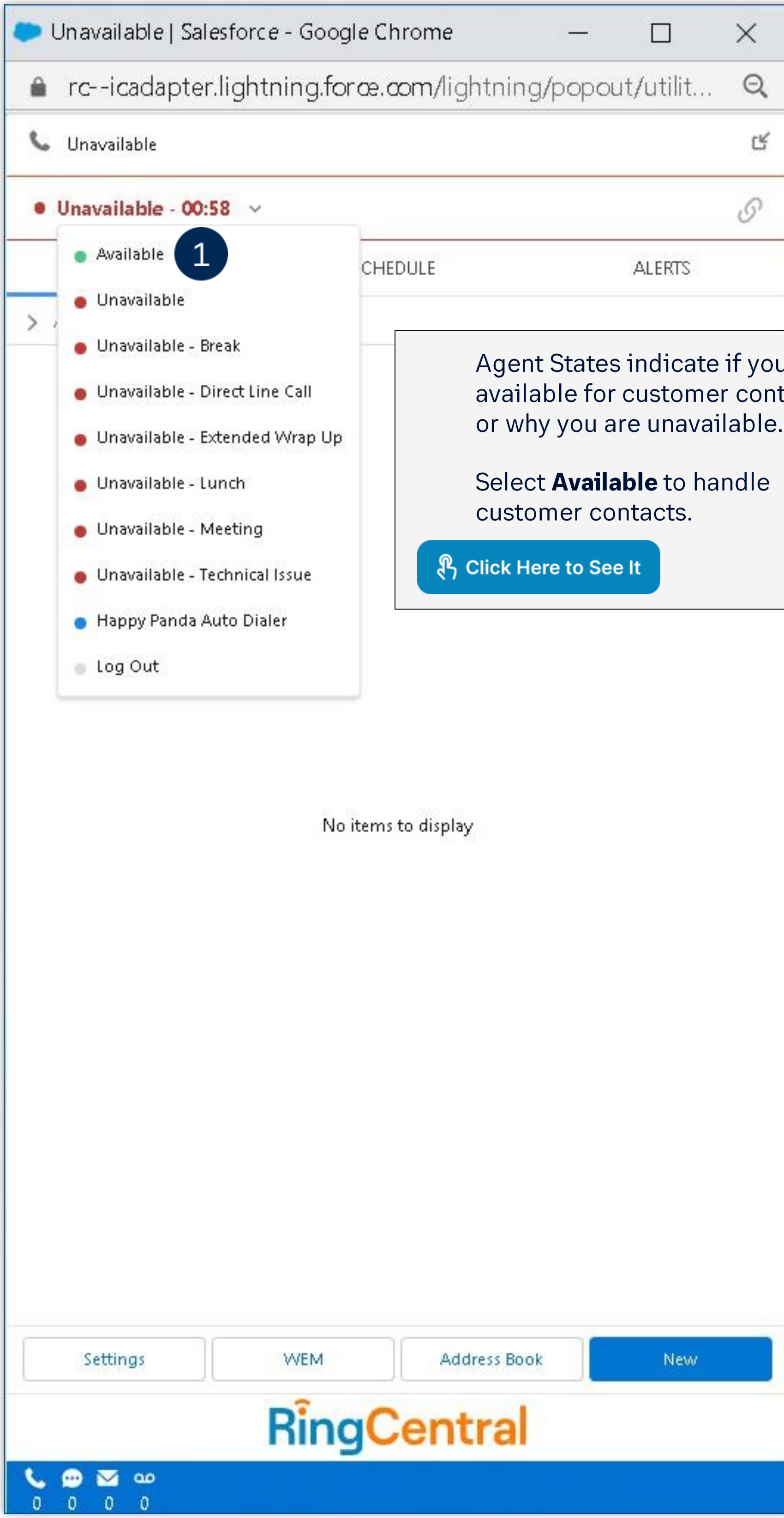


You are now logged in.

It's time to set your Agent State to Available and start handling customer contacts.

Click Here to See It

Agent States

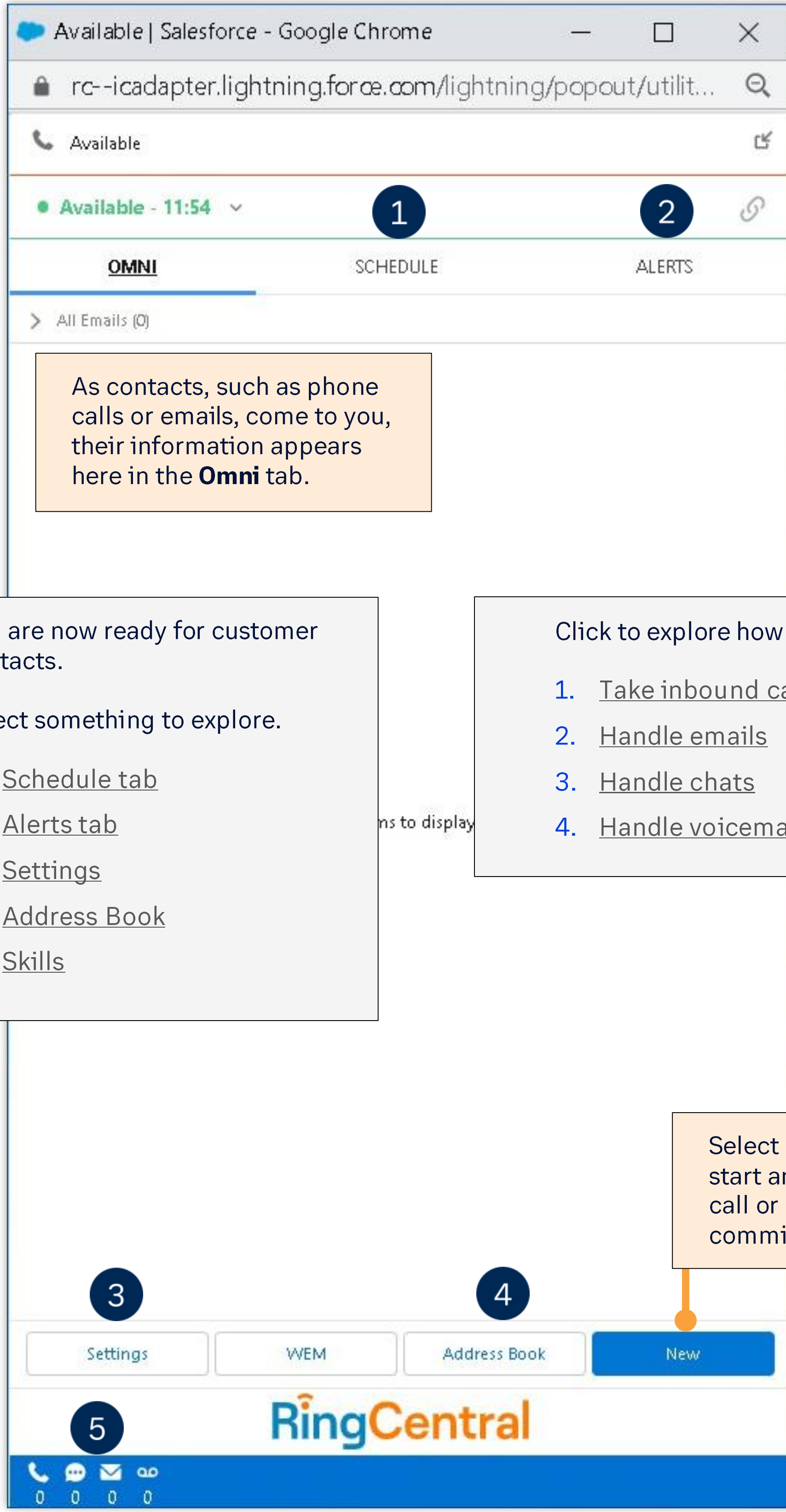


Agent States indicate if you are available for customer contacts or why you are unavailable.

Select **Available** to handle customer contacts.

Click Here to See It

Omni Tab – Available (Ready for Contacts)



As contacts, such as phone calls or emails, come to you, their information appears here in the **Omni** tab.

You are now ready for customer contacts.

Select something to explore.

1. Schedule tab
2. Alerts tab
3. Settings
4. Address Book
5. Skills

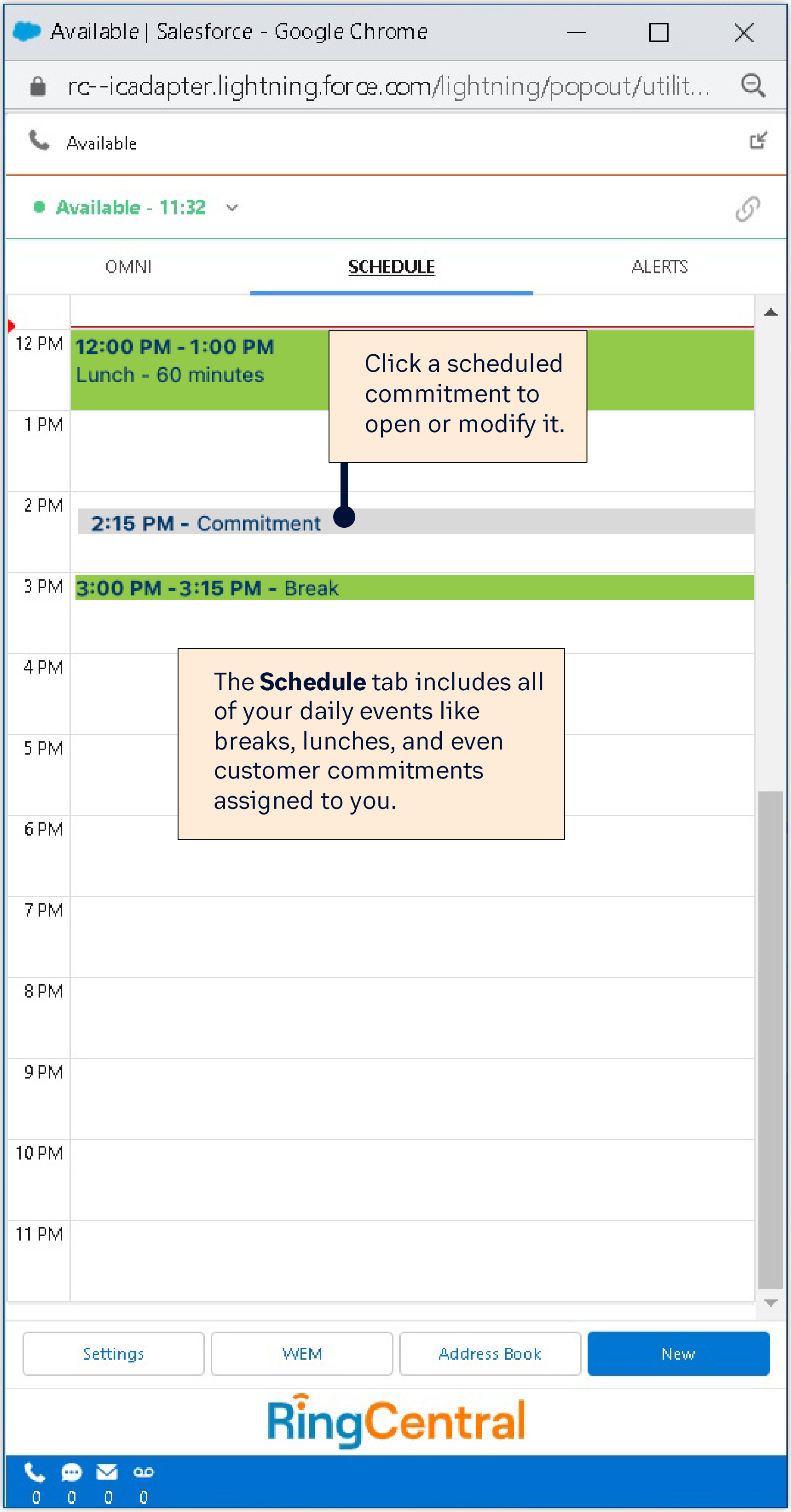
Click to explore how to:

1. Take inbound calls
2. Handle emails
3. Handle chats
4. Handle voicemails

Select **New** to start an outbound call or create a commitment.

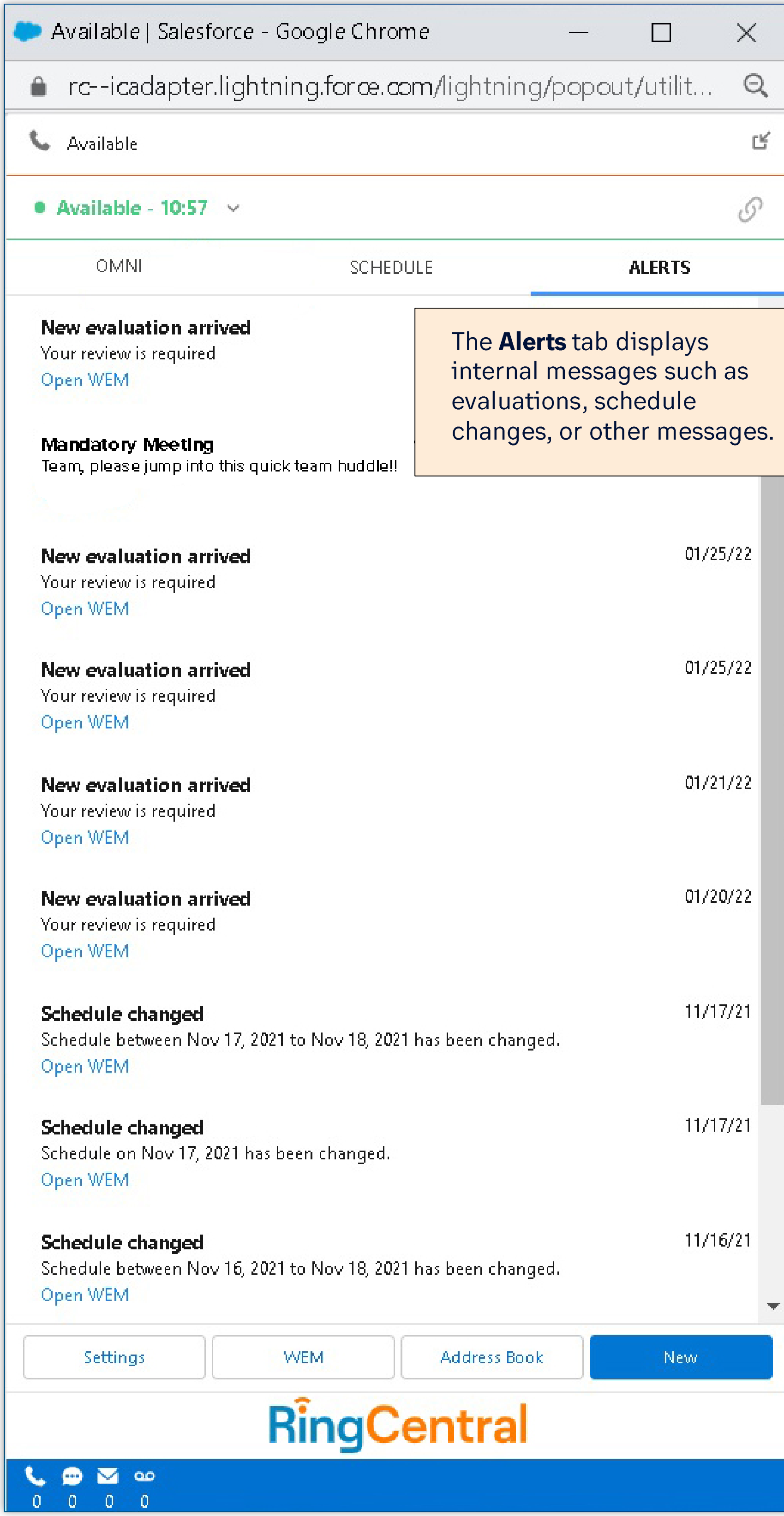
Schedule Tab

Go Back and Explore More



Alerts Tab

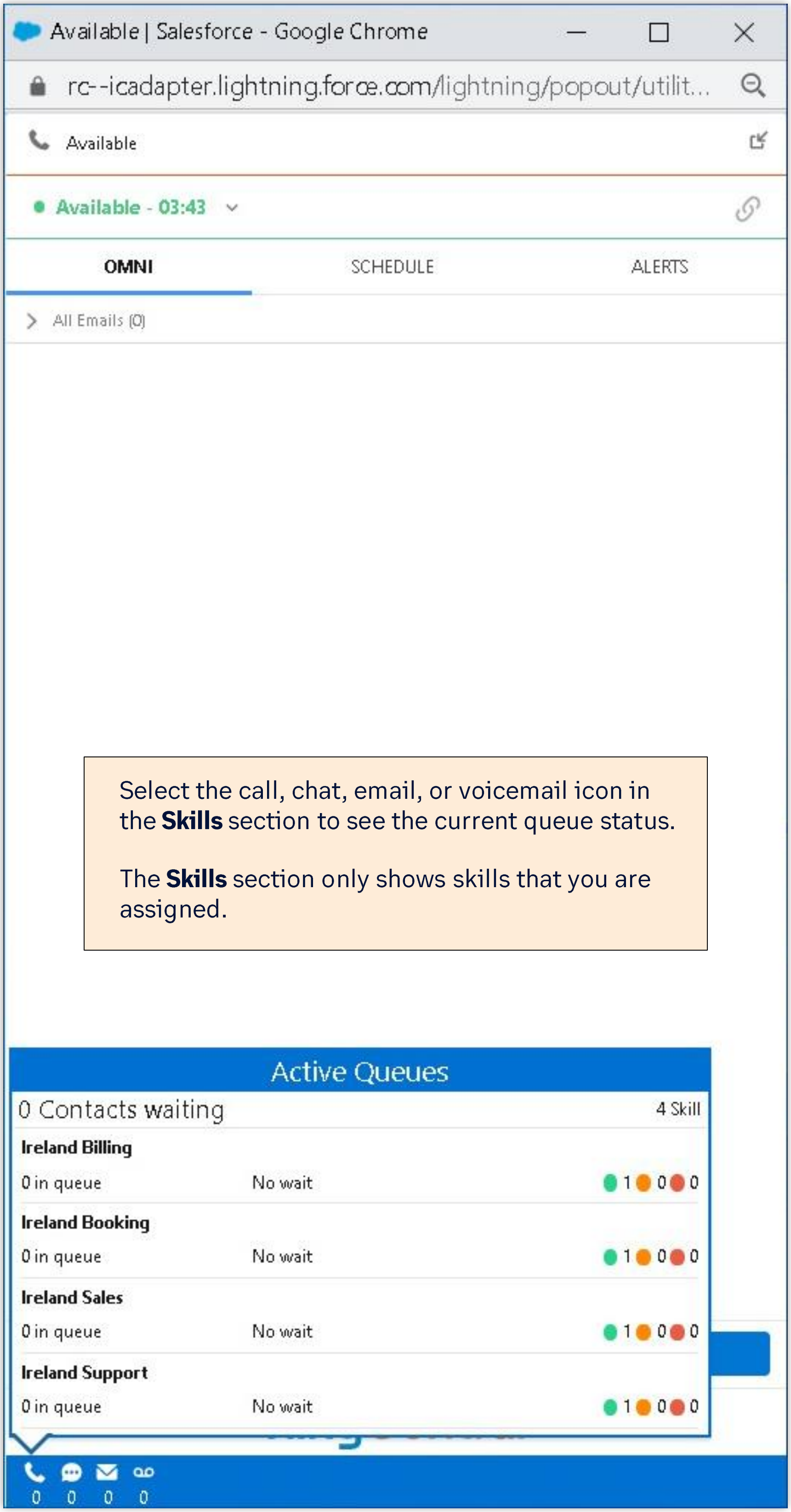
Go Back and Explore More



The **Alerts** tab displays internal messages such as evaluations, schedule changes, or other messages.

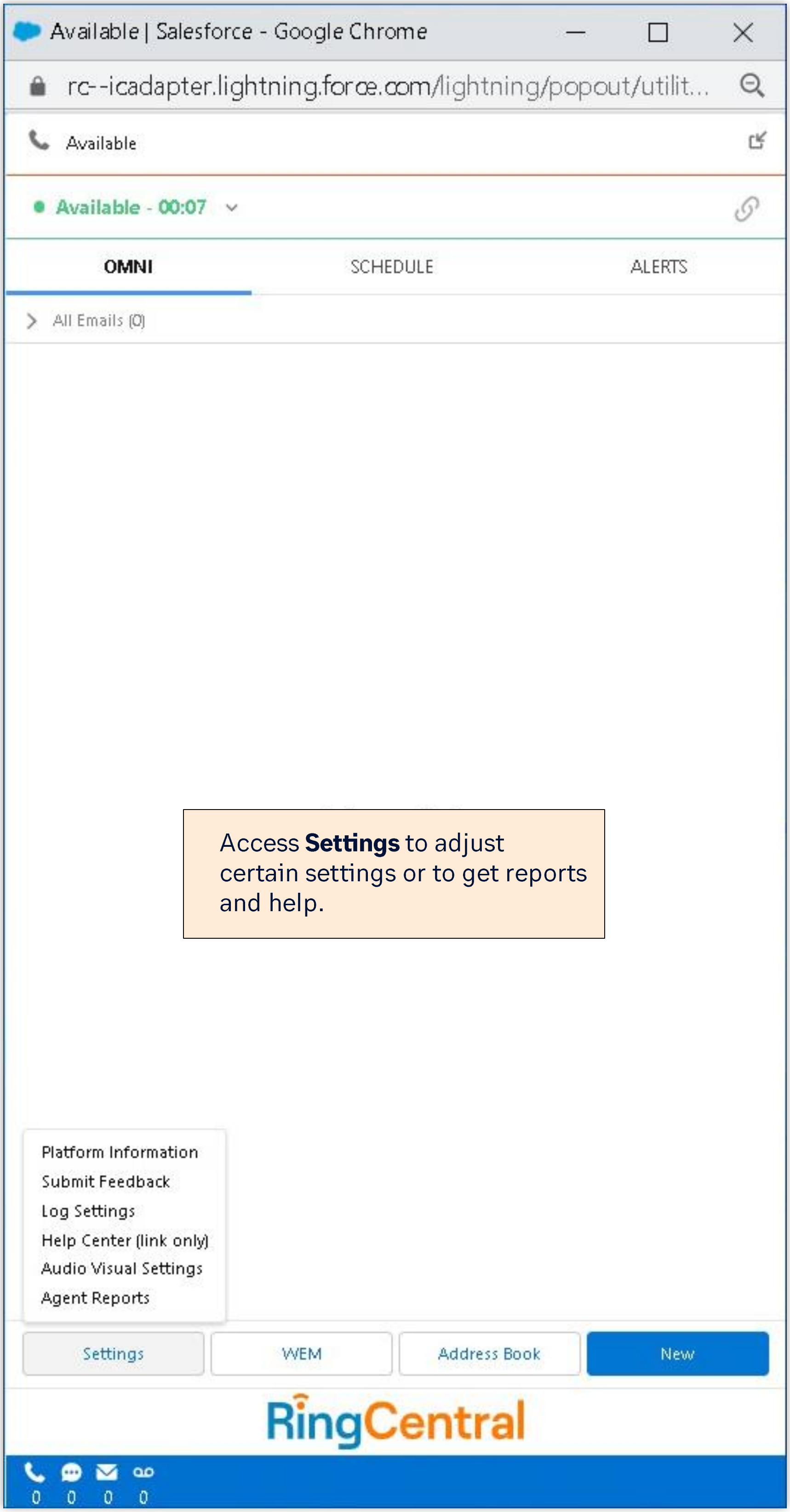
Skills

Go Back and Explore More



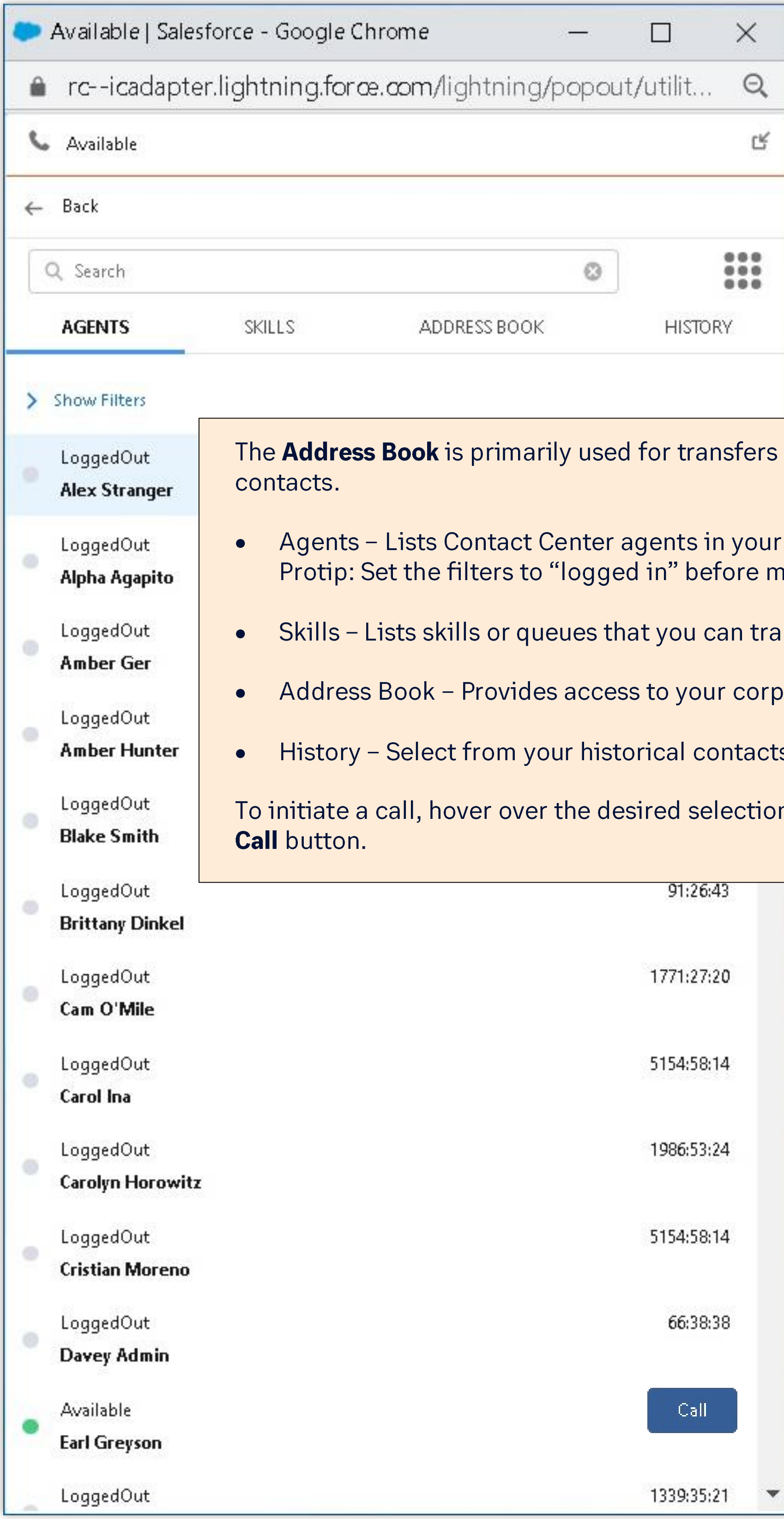
Settings

Go Back and Explore More



Address Book

Go Back and Explore More

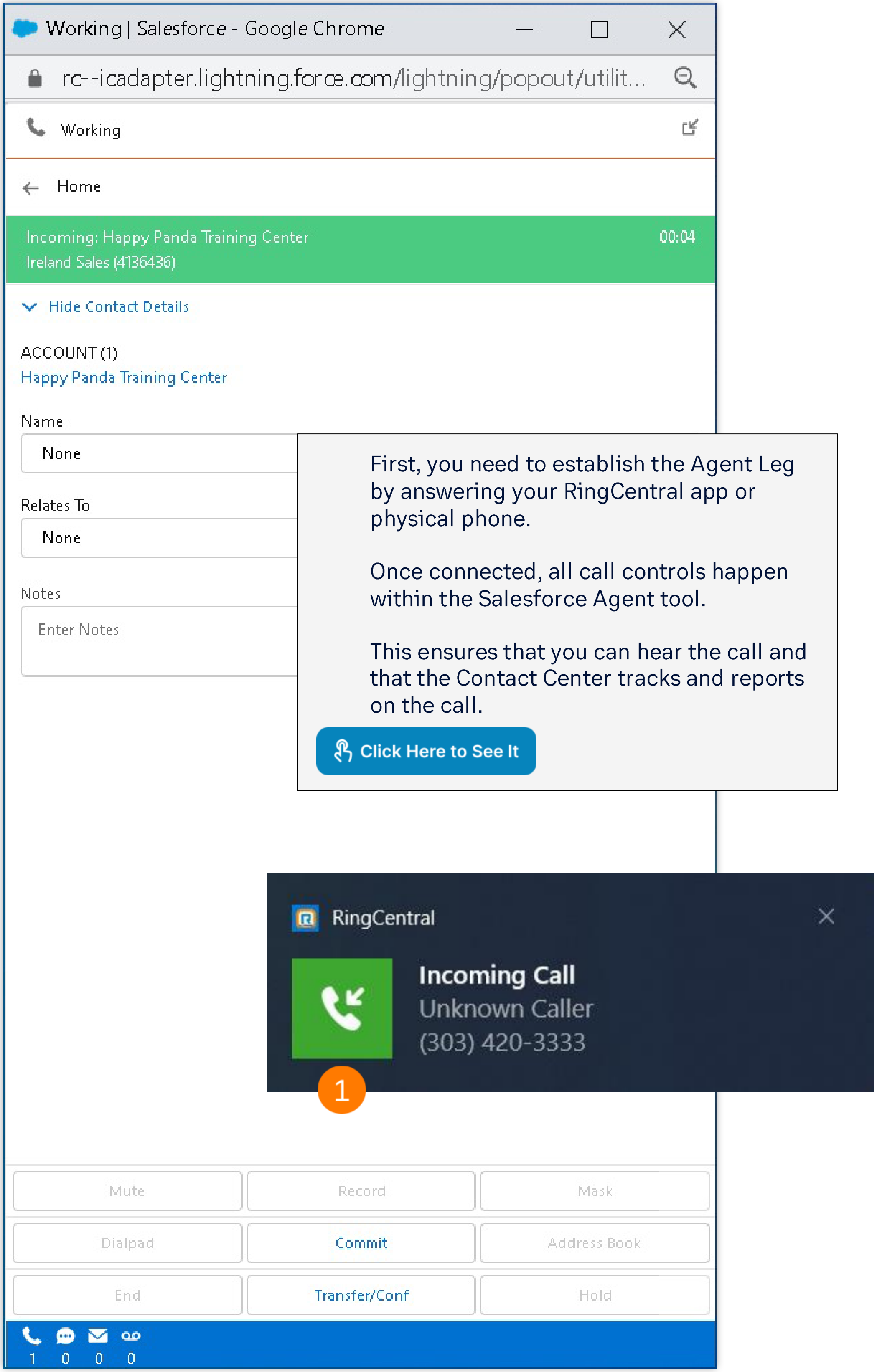


The **Address Book** is primarily used for transfers and outbound contacts.

- Agents – Lists Contact Center agents in your organization. Protip: Set the filters to "logged in" before making a selection.
- Skills – Lists skills or queues that you can transfer to or call.
- Address Book – Provides access to your corporate directory.
- History – Select from your historical contacts.

To initiate a call, hover over the desired selection and click the **Call** button.

Take Inbound Calls (Establish the Agent Leg)



First, you need to establish the Agent Leg by answering your RingCentral app or physical phone.

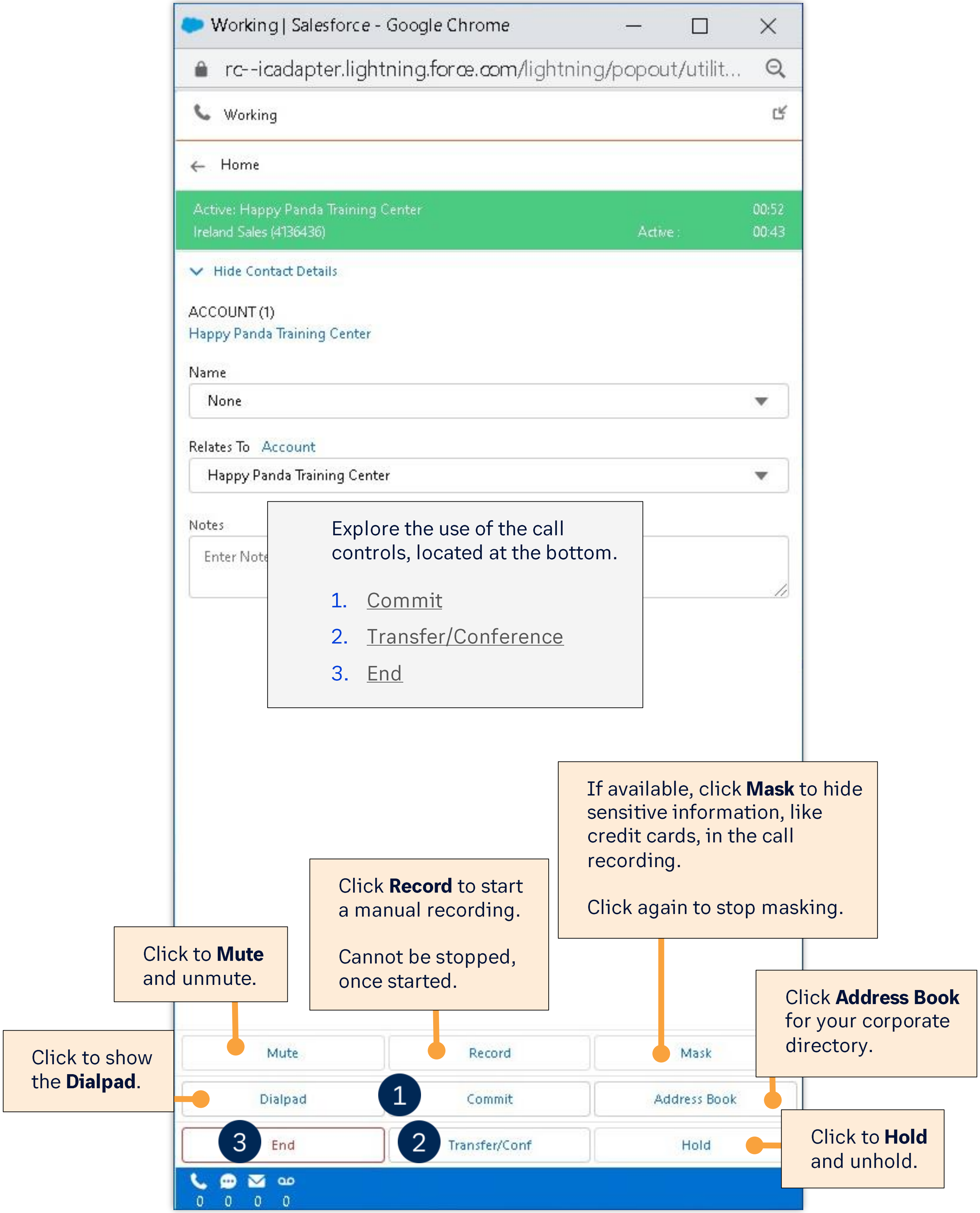
Once connected, all call controls happen within the Salesforce Agent tool.

This ensures that you can hear the call and that the Contact Center tracks and reports on the call.

Click Here to See It

Take Inbound Calls (Active Call)

Go Back and Explore More



Explore the use of the call controls, located at the bottom.

1. Commit
2. Transfer/Conference
3. End

If available, click **Mask** to hide sensitive information, like credit cards, in the call recording.

Click again to stop masking.

Click **Record** to start a manual recording.

Cannot be stopped, once started.

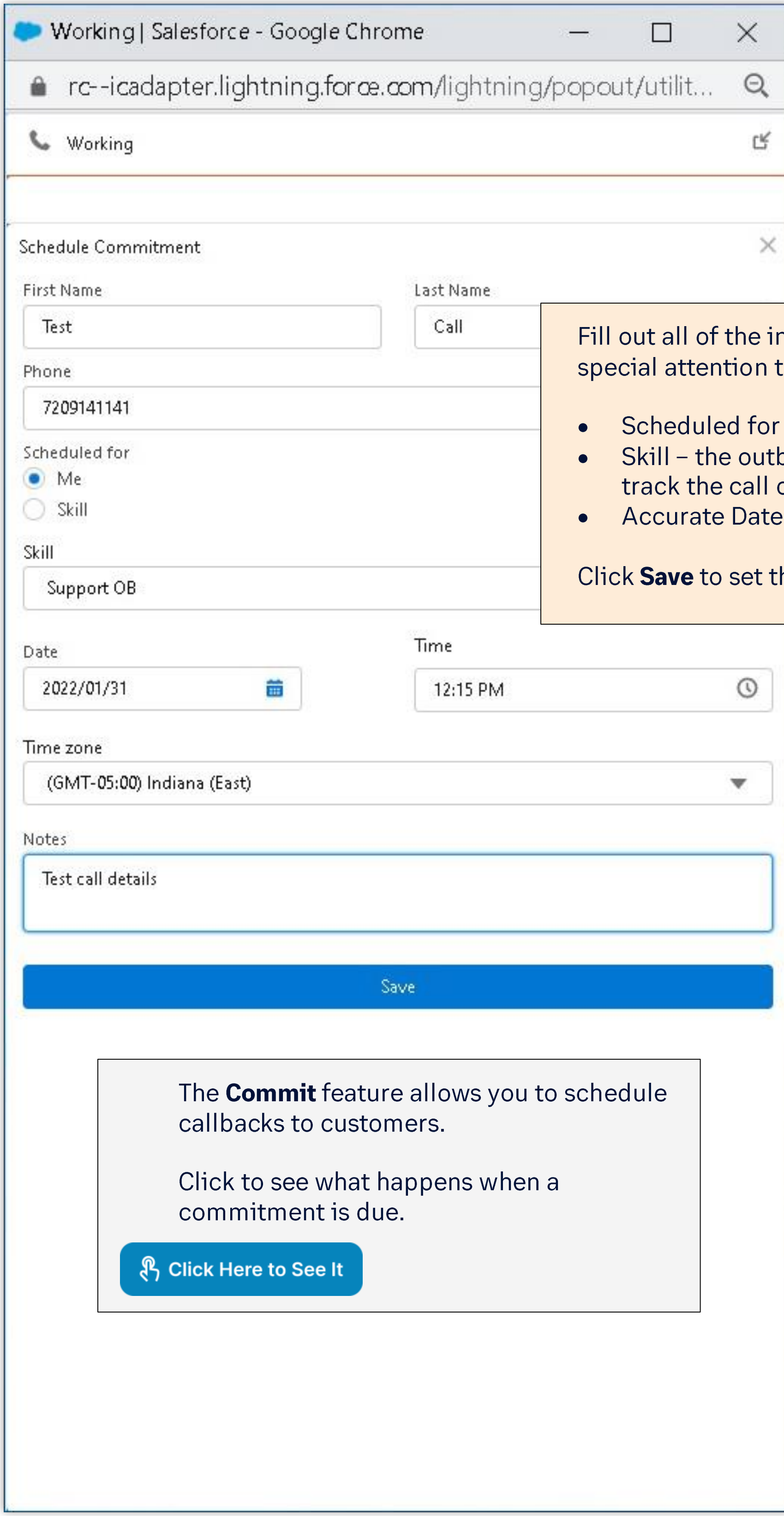
Click to **Mute** and unmute.

Click **Address Book** for your corporate directory.

Click to show the **Dialpad**.

Click to **Hold** and unhold.

Scheduling Commitments



Fill out all of the information, paying special attention to :

- Scheduled for – you or a Skill
- Skill – the outbound skill used to track the call once made
- Accurate Date and Time

Click **Save** to set the commitment.

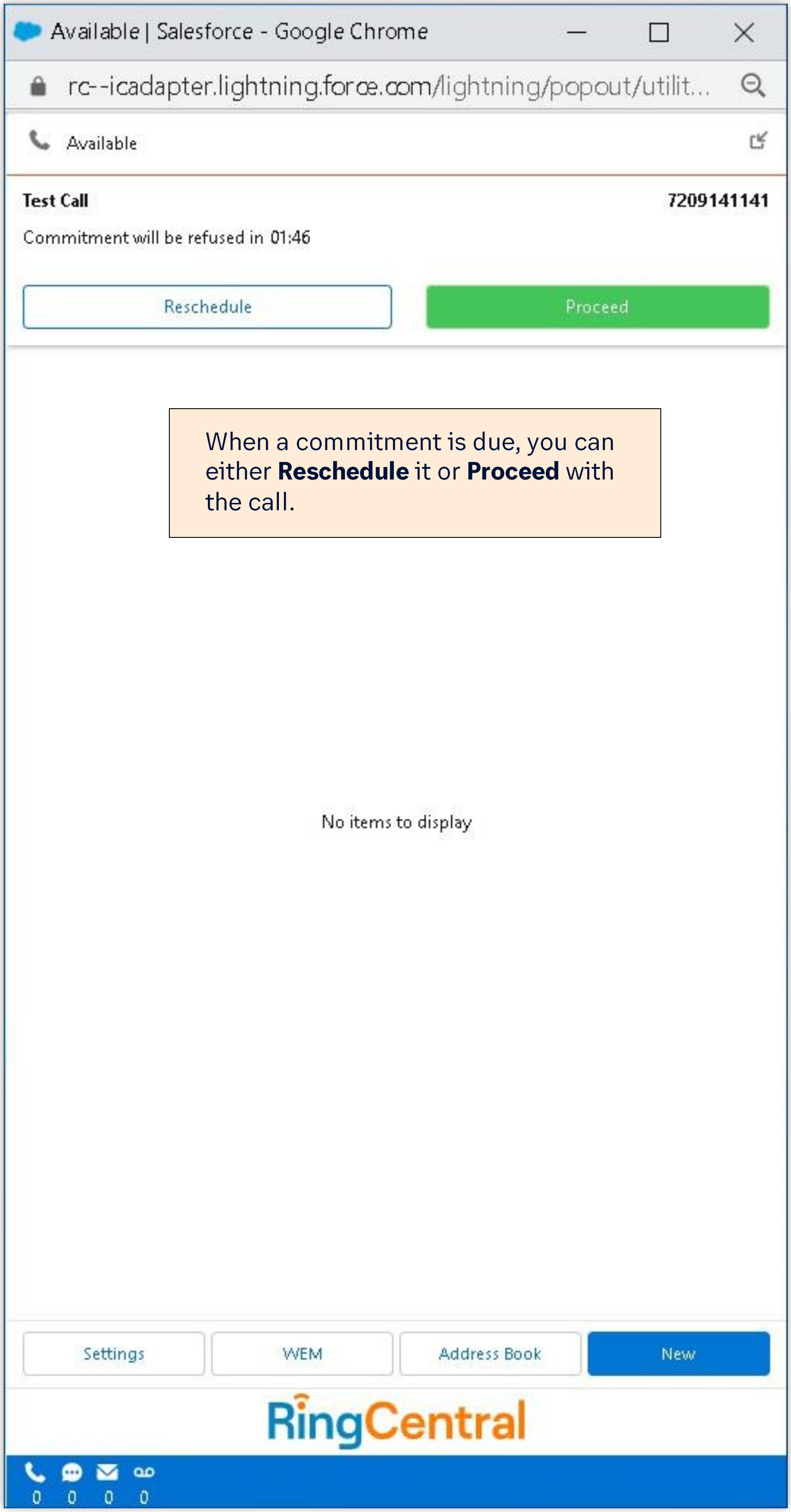
The **Commit** feature allows you to schedule callbacks to customers.

Click to see what happens when a commitment is due.

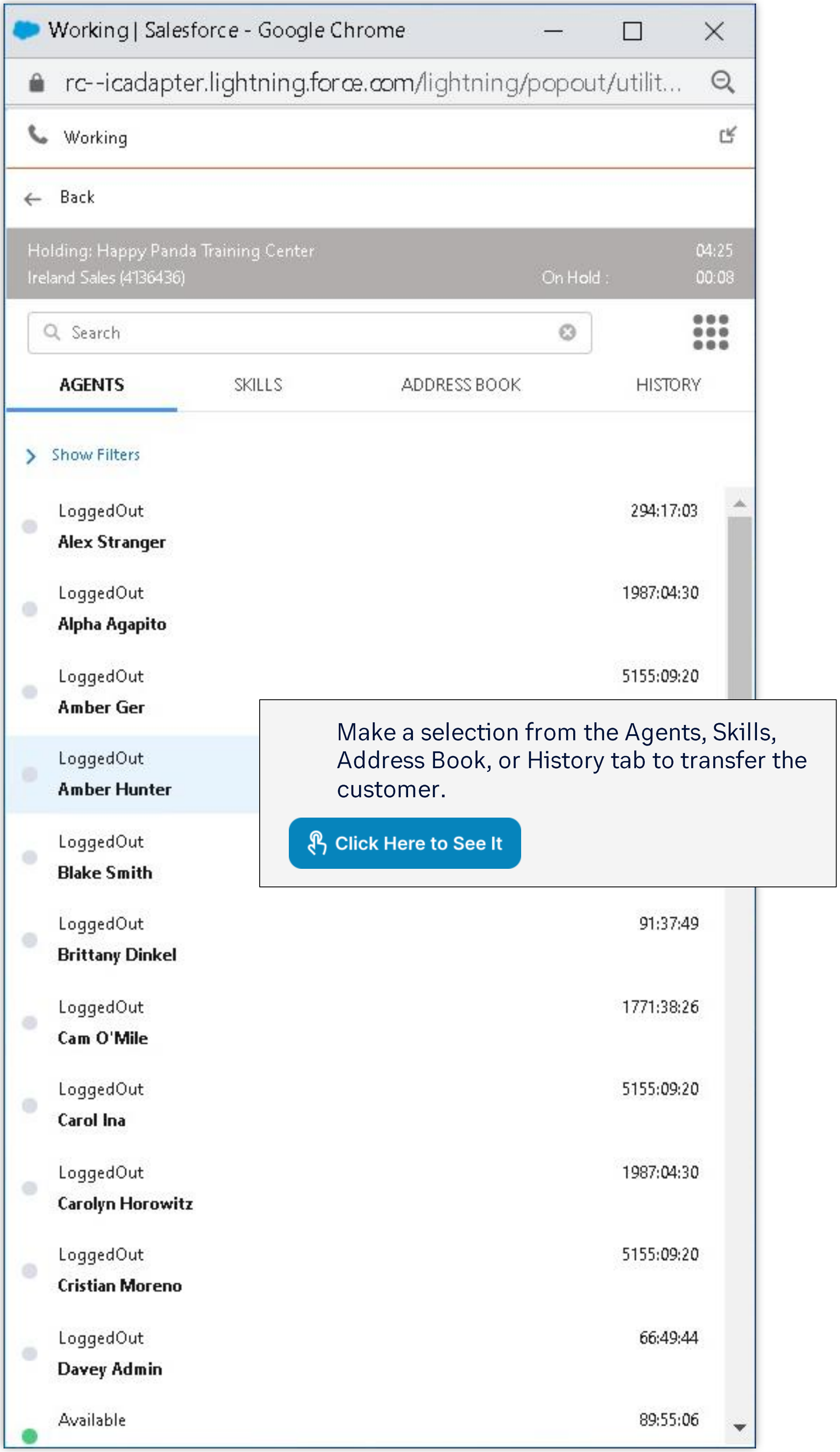
Click Here to See It

Commitment Due

Go Back and Explore More

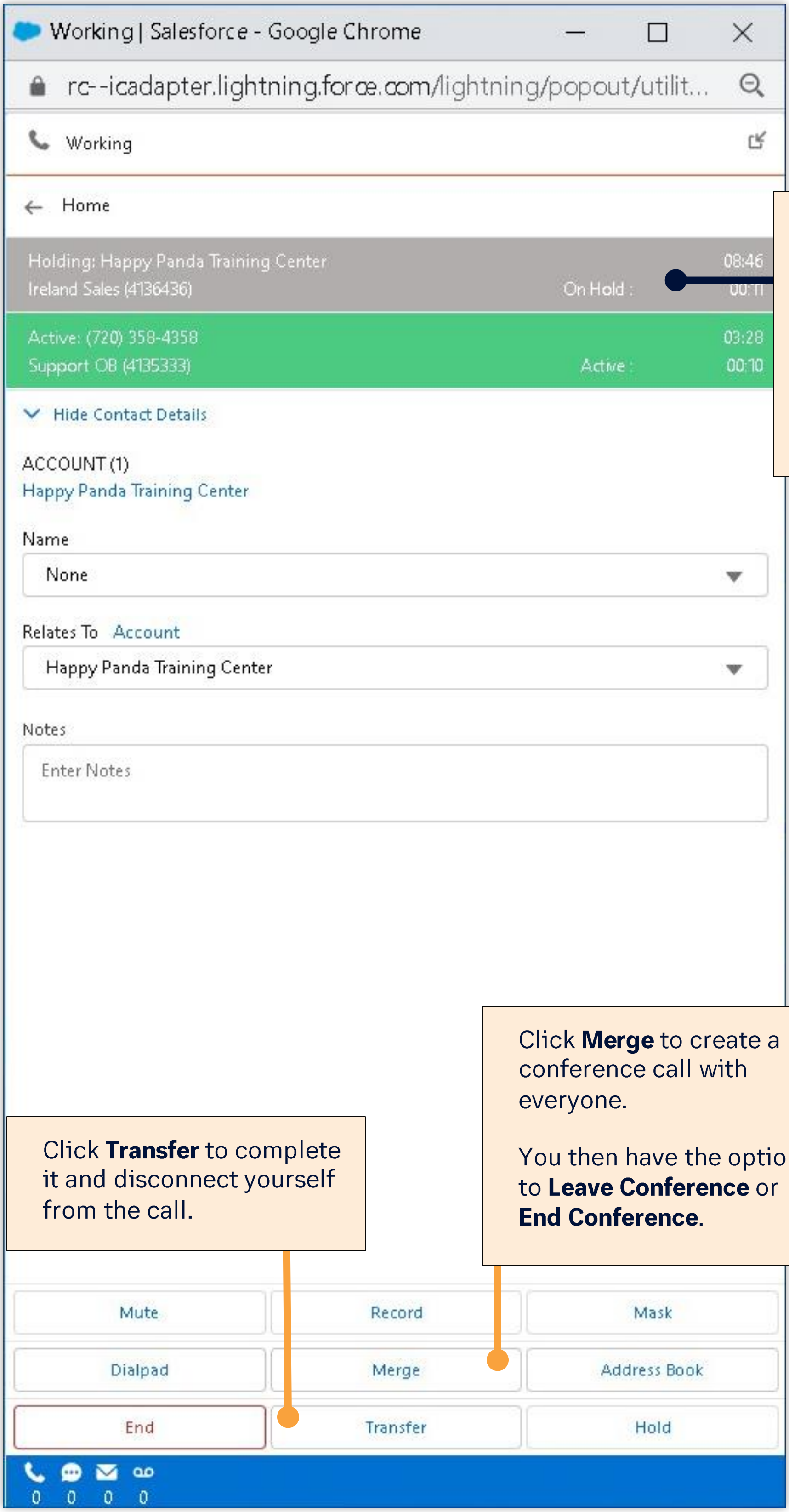


Initial Transfer/Conference



Transfer/Conference (In Progress)

Go Back and Explore More



Simply click on the 'greyed' call to reconnect to the desired call.

The other call is automatically placed on hold.

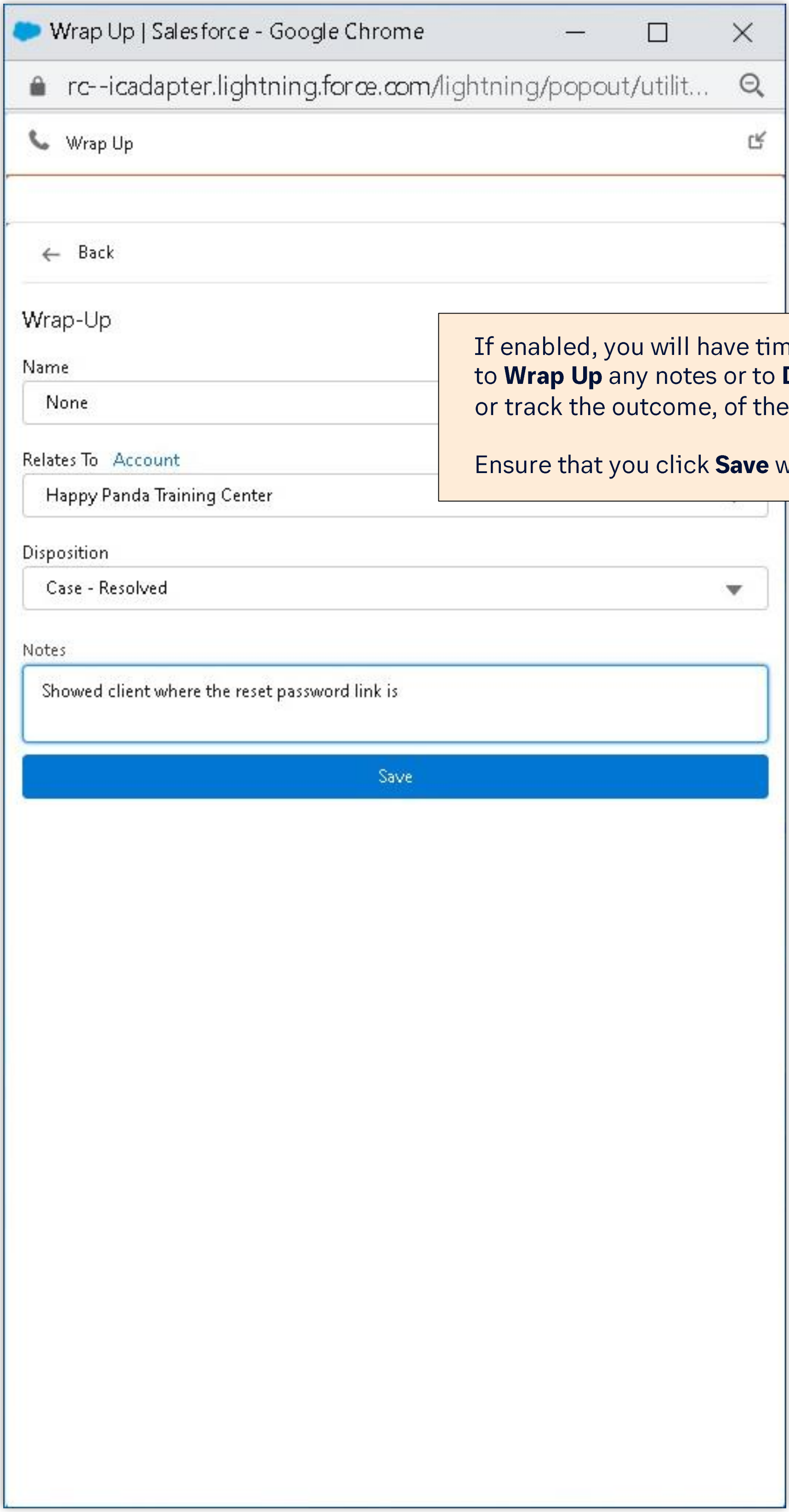
Click **Merge** to create a conference call with everyone.

You then have the options to **Leave Conference** or **End Conference**.

Click **Transfer** to complete it and disconnect yourself from the call.

Ending a Call (Wrap Up & Disposition)

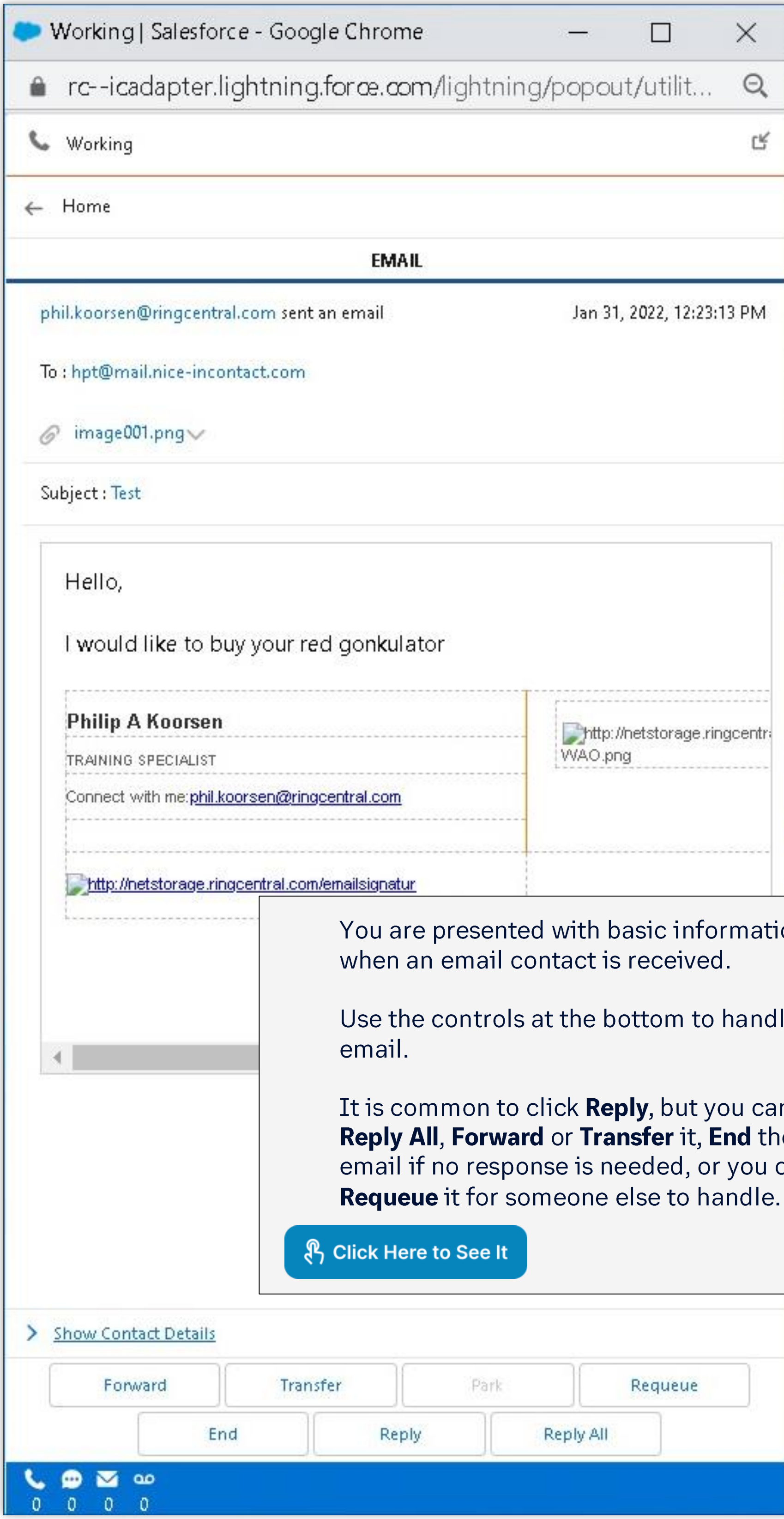
Go Back and Explore More



If enabled, you will have time after a call to **Wrap Up** any notes or to **Disposition**, or track the outcome, of the call.

Ensure that you click **Save** when done.

Initial Email Contacts



You are presented with basic information when an email contact is received.

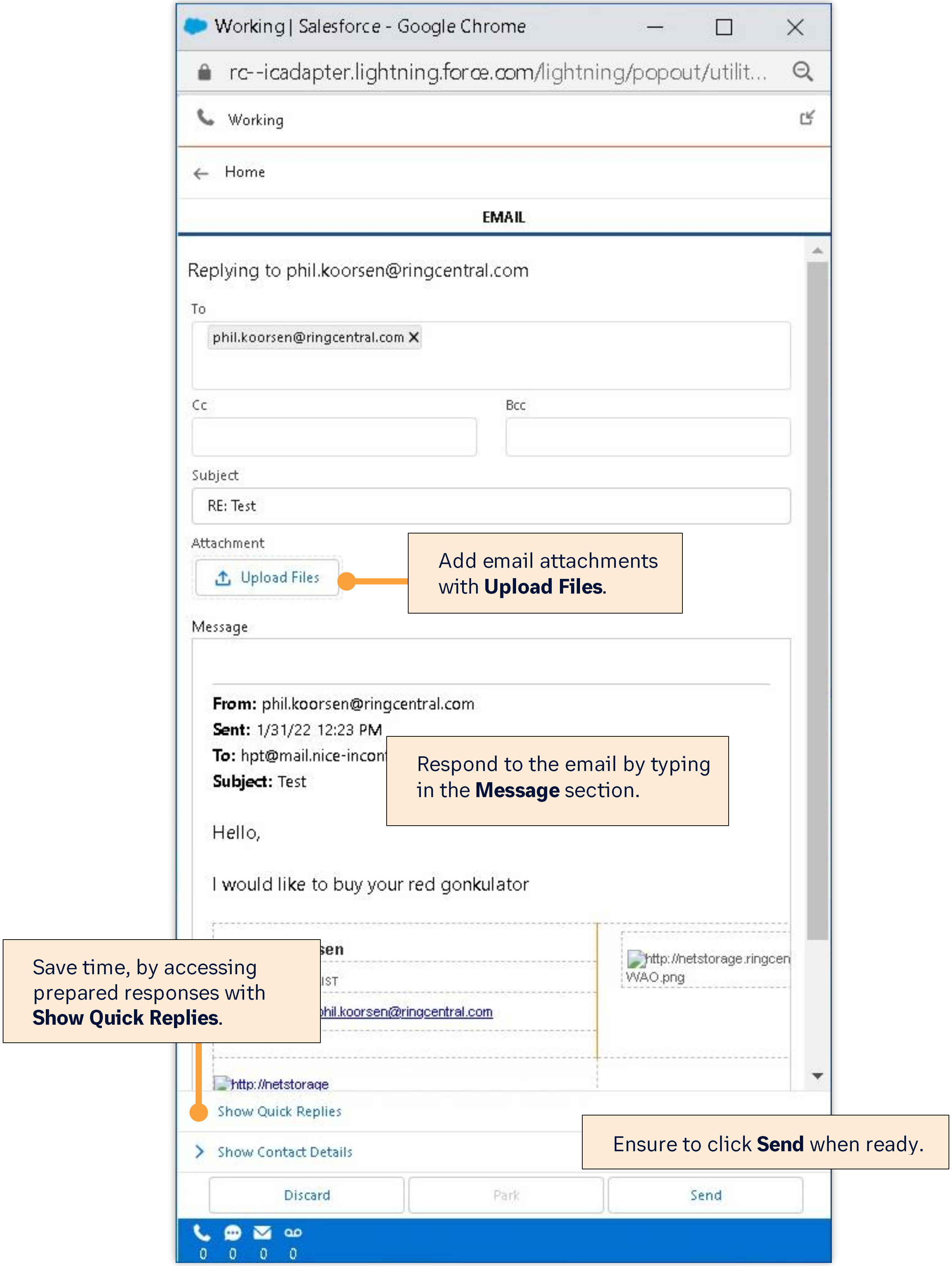
Use the controls at the bottom to handle the email.

It is common to click **Reply**, but you can also **Reply All**, **Forward** or **Transfer** it, **End** the email if no response is needed, or you can **Requeue** it for someone else to handle.

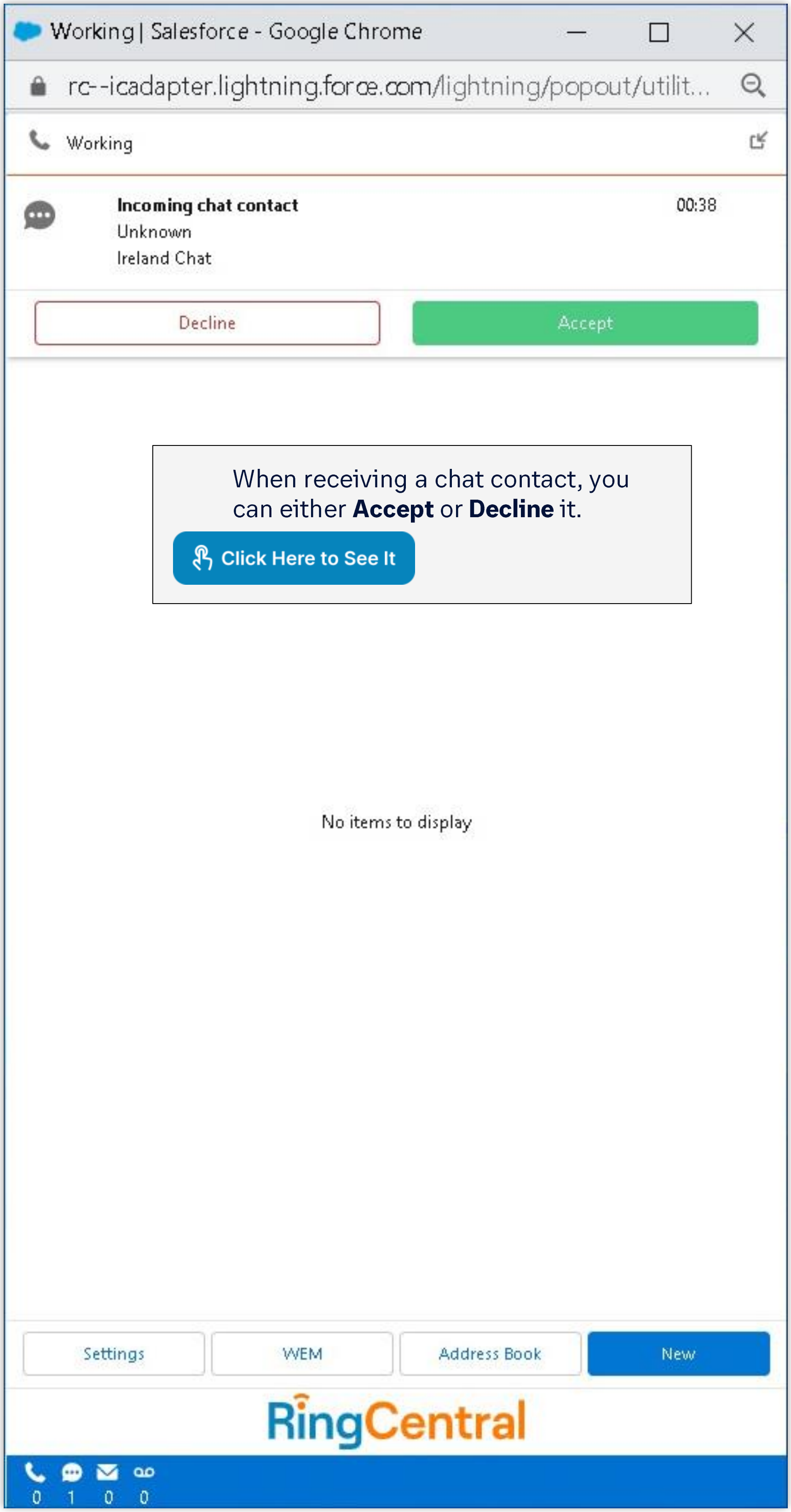
Click Here to See It

Handling Emails

Go Back and Explore More

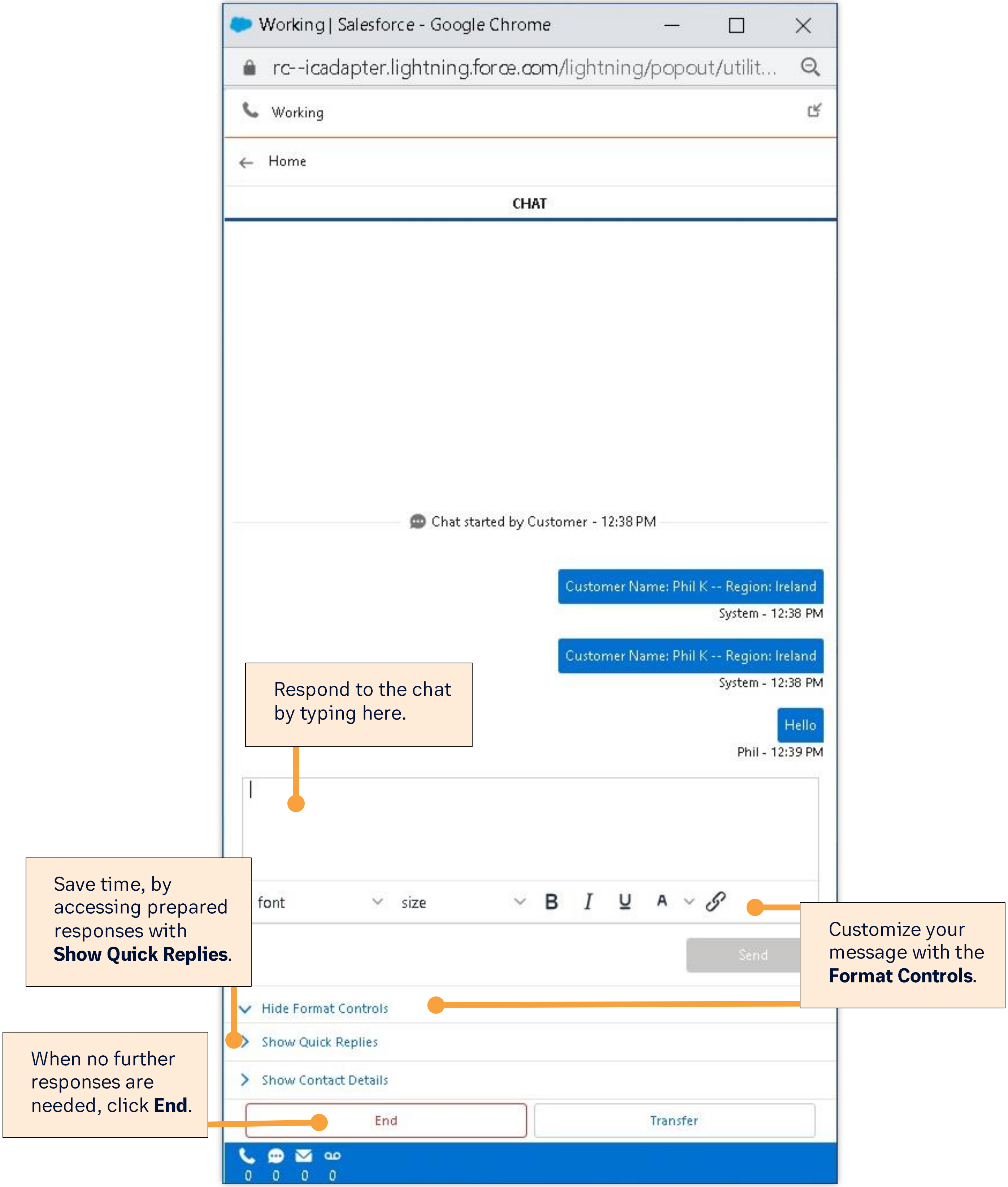


Initial Chat Contacts



Handling Chats

Go Back and Explore More



Handling Voicemails

Go Back and Explore More