

Salesforce Agent – Fully Integrated Lightning Experience

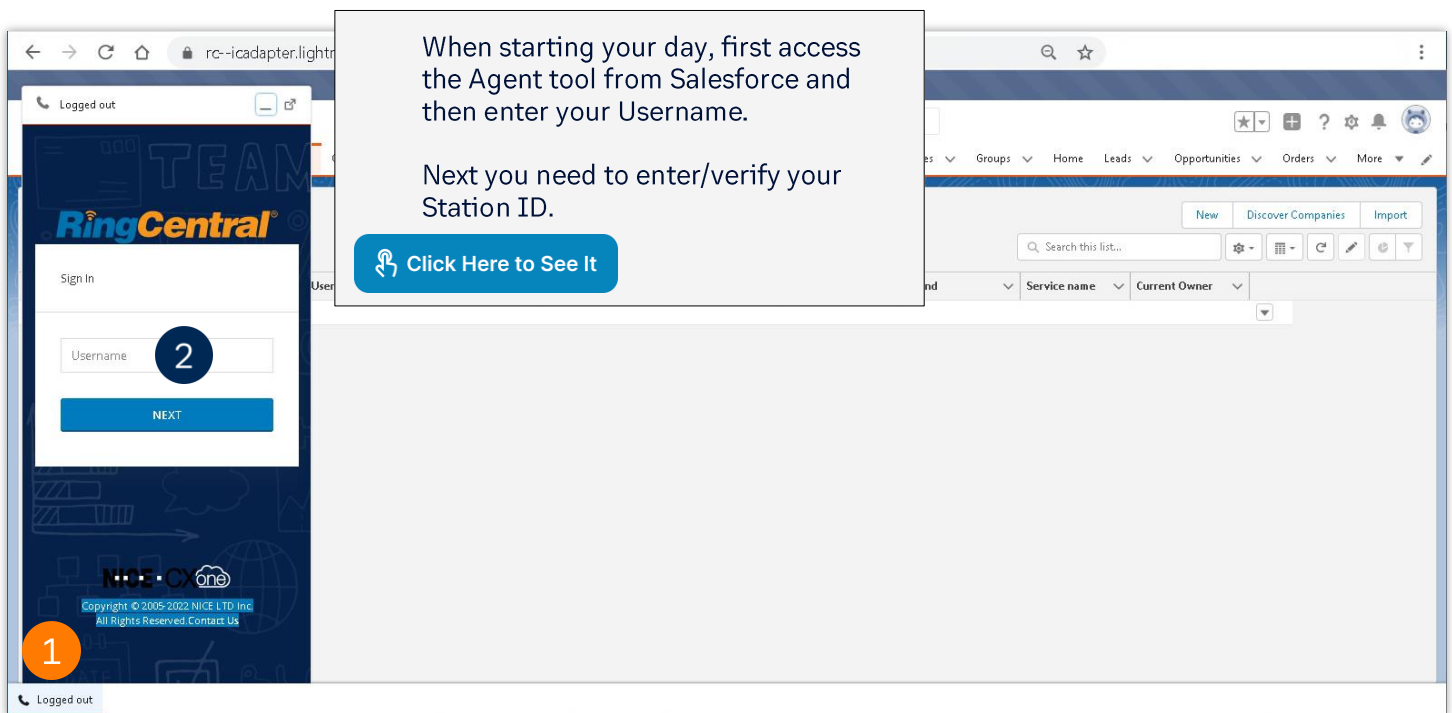
Interactive Quick Guide

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

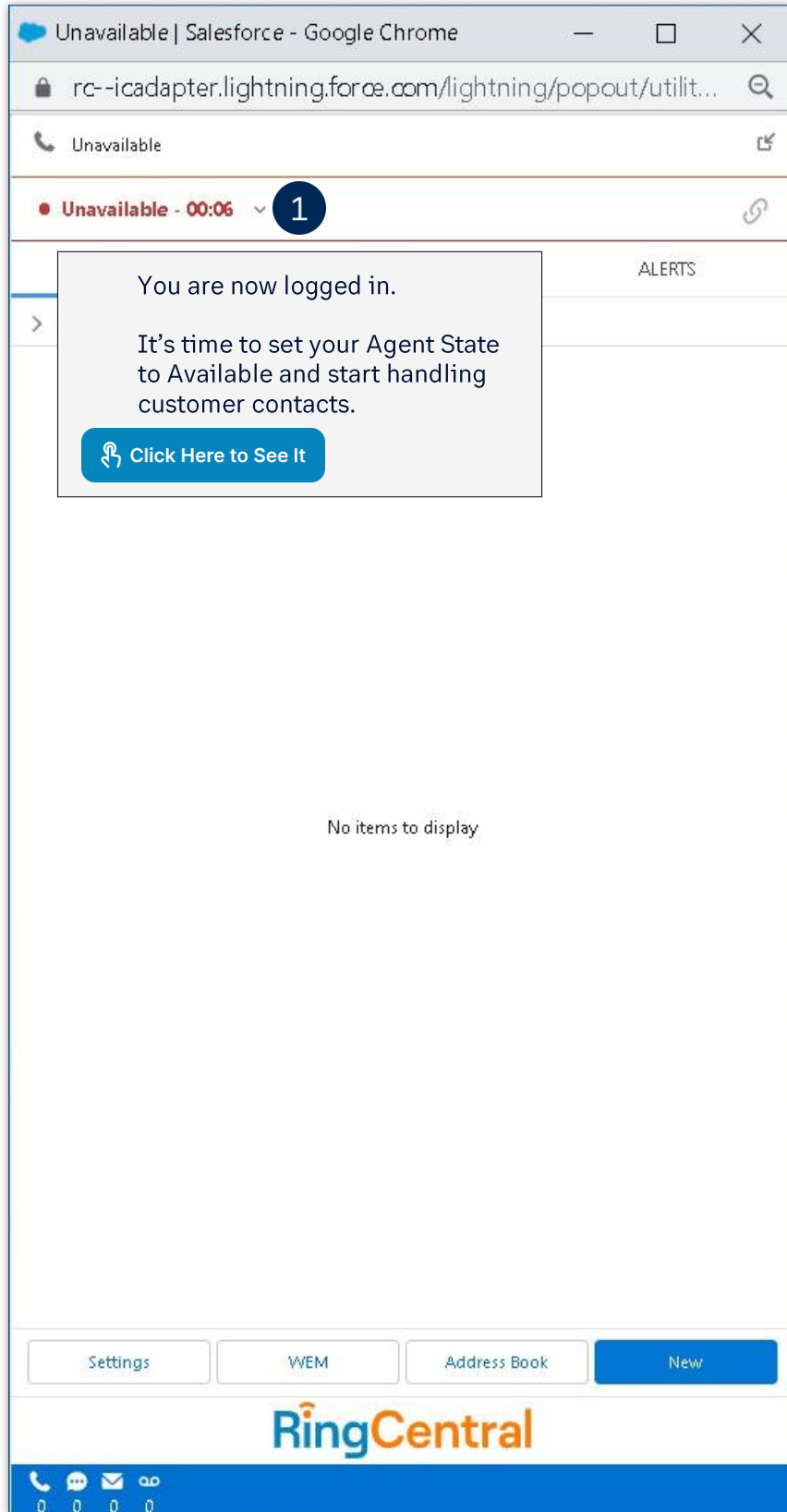


The image shows a screenshot of a web browser displaying the RingCentral login page. The page has a dark blue header with the RingCentral logo and a 'Sign In' section with a 'Username' field and a 'NEXT' button. A large blue circle with the number '2' is overlaid on the 'Username' field. A text box with a white background and a blue border is overlaid on the page, containing the following text: '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.' Below this text is a blue button with a white cursor icon and the text 'Click Here to See It'. A large blue circle with the number '1' is overlaid on the bottom left corner of the login page. The browser's address bar shows 'rc-icadpater.lightning.force.com'. The page footer includes the text 'Copyright © 2005-2022 NICE LTD Inc. All Rights Reserved. Contact Us'.

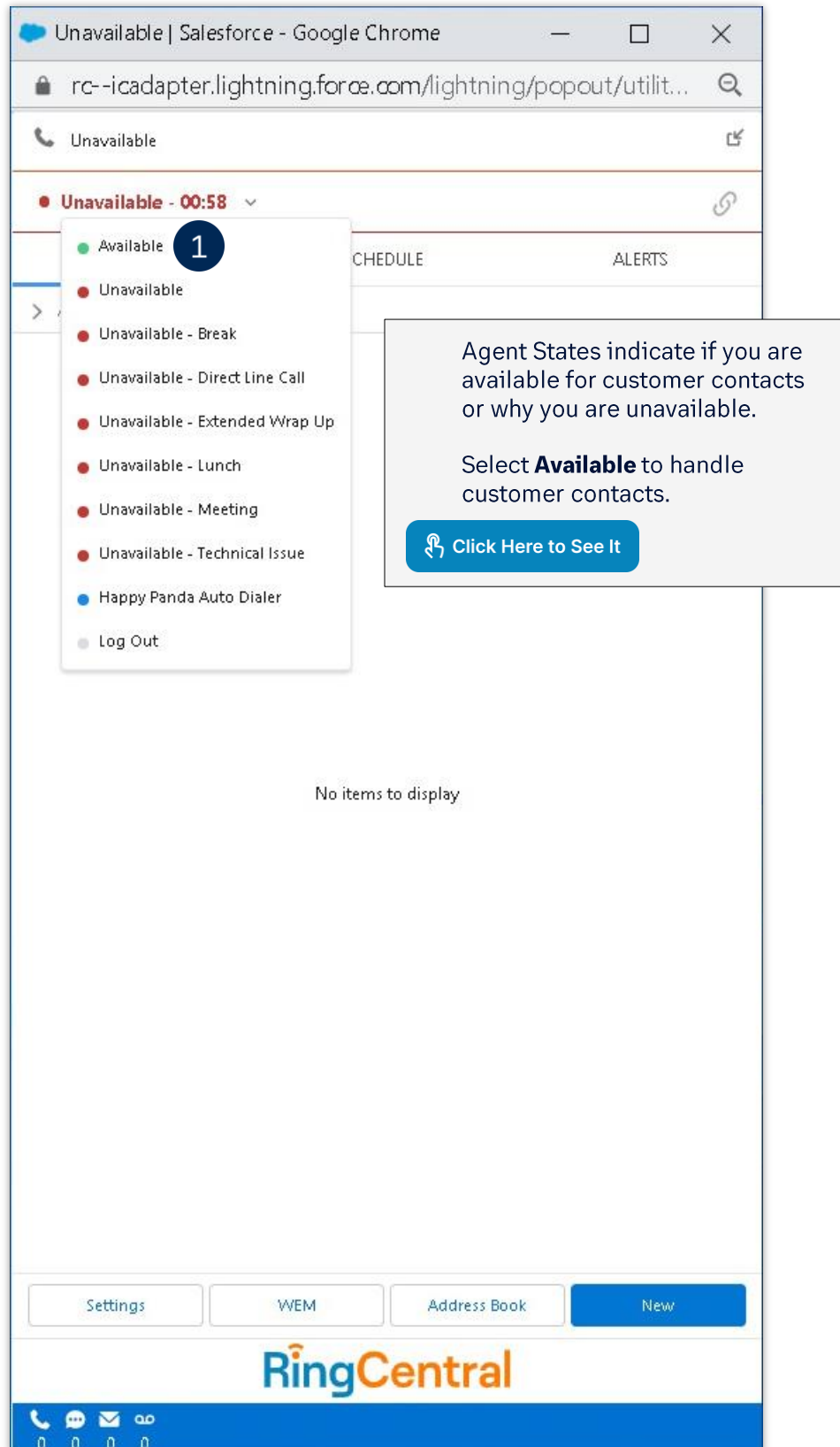
Logging In – Station ID

The screenshot displays the RingCentral login interface. On the left, a 'Logged out' window is open, showing 'Station Options' with 'Phone Number' and 'Station ID' radio buttons. The 'Station ID' option is selected, and the 'Station ID' field contains the number '2762877'. A blue circle with the number '1' is overlaid on the 'Station ID' field. Below the field is a blue 'Log In' button. A callout box is positioned over the 'Log In' button, containing the text: 'From here, enter or verify your Station ID and select **Log In**. After this, you are logged into the Agent tool.' Below the text is a blue button with a cursor icon and the text 'Click Here to See It'. The background shows the RingCentral interface with a search bar and a list of items with columns for 'User ID', 'Partner ID', 'Link To Partner ...', 'Signup Date', 'Number of DL's', 'Brand', 'Service name', and 'Current Owner'.

Initial Log In (Unavailable)



Agent States



Unavailable | Salesforce - Google Chrome

rc--icadapter.lightning.force.com/lightning/popout/utilit...

Unavailable

Unavailable - 00:58

- Available 1
- Unavailable
- Unavailable - Break
- Unavailable - Direct Line Call
- Unavailable - Extended Wrap Up
- Unavailable - Lunch
- Unavailable - Meeting
- Unavailable - Technical Issue
- Happy Panda Auto Dialer
- Log Out

SCHEDULE ALERTS

No items to display

Settings WEM Address Book New

RingCentral

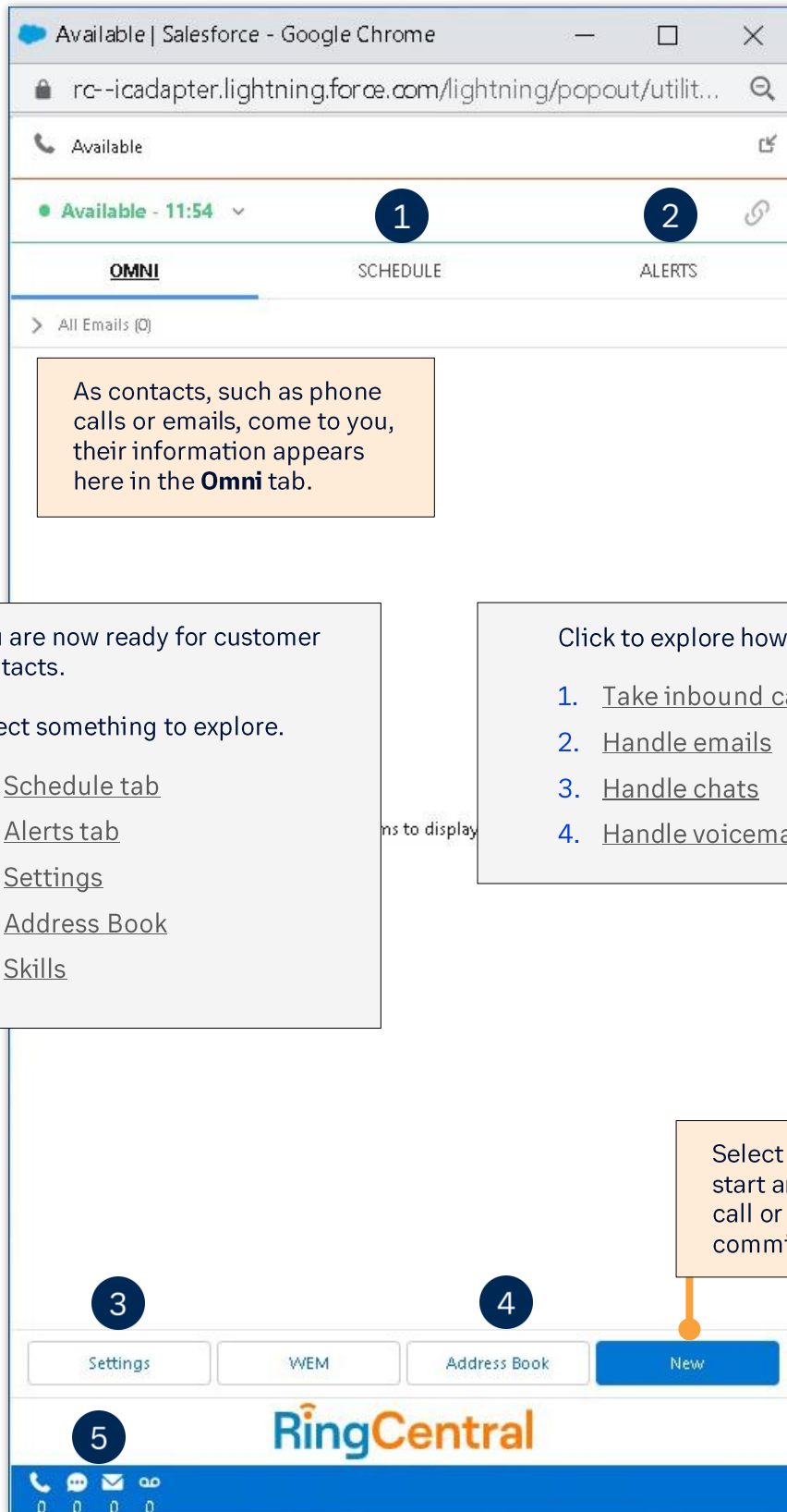
0 0 0 0

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)



Schedule Tab

[Go Back and Explore More](#)

The screenshot shows a web browser window with the RingCentral interface. The browser title is "Available | Salesforce - Google Chrome" and the address bar shows "rc-icadapter.lightning.force.com/lightning/popout/utilit...". The page header includes "Available" and "Available - 11:32". The main content area has three tabs: "OMNI", "SCHEDULE" (which is selected), and "ALERTS". The "SCHEDULE" tab displays a calendar grid with the following events:

- 12:00 PM - 1:00 PM: Lunch - 60 minutes (green bar)
- 2:15 PM - Commitment (grey bar)
- 3:00 PM - 3:15 PM: Break (green bar)

Two callout boxes provide additional information:

- A callout box pointing to the 12:00 PM - 1:00 PM event says: "Click a scheduled commitment to open or modify it."
- A callout box in the center of the calendar says: "The **Schedule** tab includes all of your daily events like breaks, lunches, and even customer commitments assigned to you."

At the bottom of the interface, there are buttons for "Settings", "WEM", "Address Book", and "New". The RingCentral logo is displayed below these buttons. The bottom status bar shows icons for phone, chat, email, and video, each with a "0" below it.

Alerts Tab

[Go Back and Explore More](#)

The screenshot shows a web browser window with the RingCentral interface. The top navigation bar includes 'Available', 'SCHEDULE', and 'ALERTS' (which is selected). Below the navigation bar, there is a list of alerts. The first alert is 'New evaluation arrived' with the subtext 'Your review is required' and a link 'Open WEM'. The second alert is 'Mandatory Meeting' with the subtext 'Team, please jump into this quick team huddle!!'. Below these are several more 'New evaluation arrived' alerts with dates ranging from 01/25/22 to 01/20/22, and three 'Schedule changed' alerts with dates 11/17/21 and 11/16/21. At the bottom of the alert list, there are buttons for 'Settings', 'WEM', 'Address Book', and 'New'. The RingCentral logo is visible at the bottom of the page, along with a status bar showing icons for phone, chat, email, and video, each with a '0' below it.

Alert Title	Subtext	Date
New evaluation arrived	Your review is required	
Mandatory Meeting	Team, please jump into this quick team huddle!!	
New evaluation arrived	Your review is required	01/25/22
New evaluation arrived	Your review is required	01/25/22
New evaluation arrived	Your review is required	01/21/22
New evaluation arrived	Your review is required	01/20/22
Schedule changed	Schedule between Nov 17, 2021 to Nov 18, 2021 has been changed.	11/17/21
Schedule changed	Schedule on Nov 17, 2021 has been changed.	11/17/21
Schedule changed	Schedule between Nov 16, 2021 to Nov 18, 2021 has been changed.	11/16/21

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

Skills

[Go Back and Explore More](#)

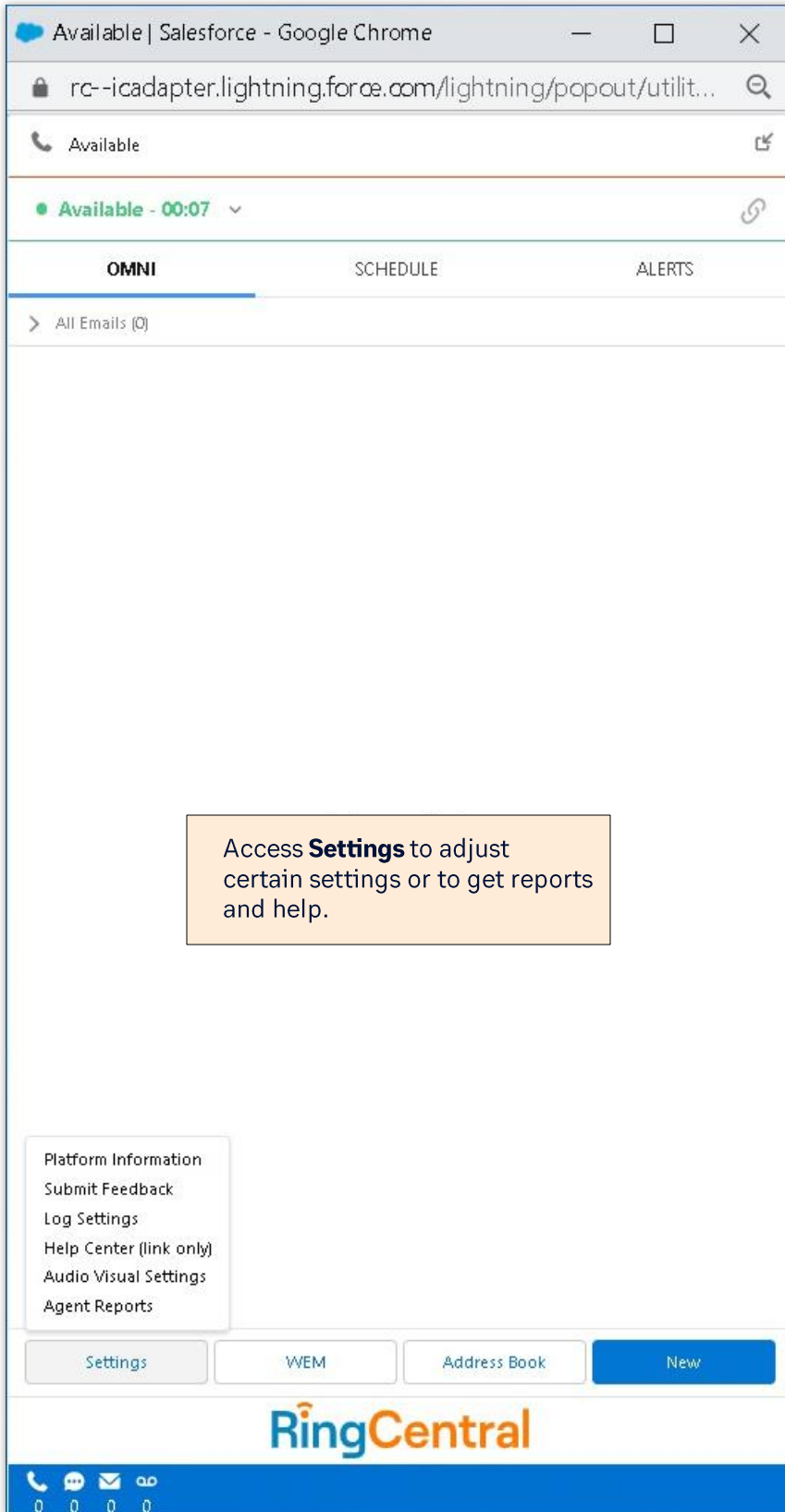
Select the call, chat, email, or voicemail icon in the **Skills** section to see the current queue status.

The **Skills** section only shows skills that you are assigned.

Active Queues			
0 Contacts waiting		4 Skill	
Ireland Billing			
0 in queue	No wait	1	0 0 0
Ireland Booking			
0 in queue	No wait	1	0 0 0
Ireland Sales			
0 in queue	No wait	1	0 0 0
Ireland Support			
0 in queue	No wait	1	0 0 0

Settings

[Go Back and Explore More](#)



Address Book

[Go Back and Explore More](#)

The screenshot shows a web browser window with the URL `rc--icadapter.lightning.force.com/lightning/popout/utilit...`. The page title is "Available | Salesforce - Google Chrome". The interface includes a search bar, a navigation menu with "AGENTS", "SKILLS", "ADDRESS BOOK", and "HISTORY", and a list of agents. The "ADDRESS BOOK" tab is selected. The list of agents includes names like Alex Stranger, Alpha Agapito, Amber Ger, Amber Hunter, Blake Smith, Brittany Dinkel, Cam O'Mile, Carol Ina, Carolyn Horowitz, Cristian Moreno, Davey Admin, and Earl Greyson. A "Call" button is visible next to Earl Greyson's entry.

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)

The screenshot displays the Salesforce Agent interface in a browser window. The browser title is "Working | Salesforce - Google Chrome" and the URL is "rc--icadapter.lightning.force.com/lightning/popout/utilit...". The interface shows a call in progress with a green header bar indicating "Incoming: Happy Panda Training Center" and "Ireland Sales (4136436)" with a duration of "00:04". Below the header, there is a "Hide Contact Details" button and a section for "ACCOUNT (1)" with the name "Happy Panda Training Center". The "Name" field is set to "None", "Relates To" is "None", and the "Notes" field contains "Enter Notes".

A call notification pop-up is shown in the bottom right corner, titled "RingCentral" and "Incoming Call" from an "Unknown Caller" with the number "(303) 420-3333". A red circle with the number "1" is overlaid on the notification. Below the notification, there is a grid of call control buttons: "Mute", "Record", "Mask", "Dialpad", "Commit", "Address Book", "End", "Transfer/Conf", and "Hold". At the bottom of the interface, there is a status bar with icons for call, chat, email, and voicemail, and the numbers "1 0 0 0".

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](#)

The screenshot shows a web browser window with the URL `rc--icadapter.lightning.force.com/lightning/popout/utilit...`. The interface displays an active call for 'Happy Panda Training Center' with a duration of 00:52. Below the call details, there are several call control buttons: Mute, Record, Mask, Dialpad, Commit, Address Book, End, Transfer/Conf, and Hold. A call control bar at the bottom shows icons for mute, hold, mute, and hold.

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 to show the **Dialpad**.

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

Click to **Hold** and unhold.

Scheduling Commitments

Working | Salesforce - Google Chrome

rc-icadapter.lightning.force.com/lightning/popout/utilit...

Working

Schedule Commitment

First Name: Test Last Name: Call

Phone: 7209141141

Scheduled for:
 Me
 Skill

Skill: Support OB

Date: 2022/01/31 Time: 12:15 PM

Time zone: (GMT-05:00) Indiana (East)

Notes: Test call details

Save

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.

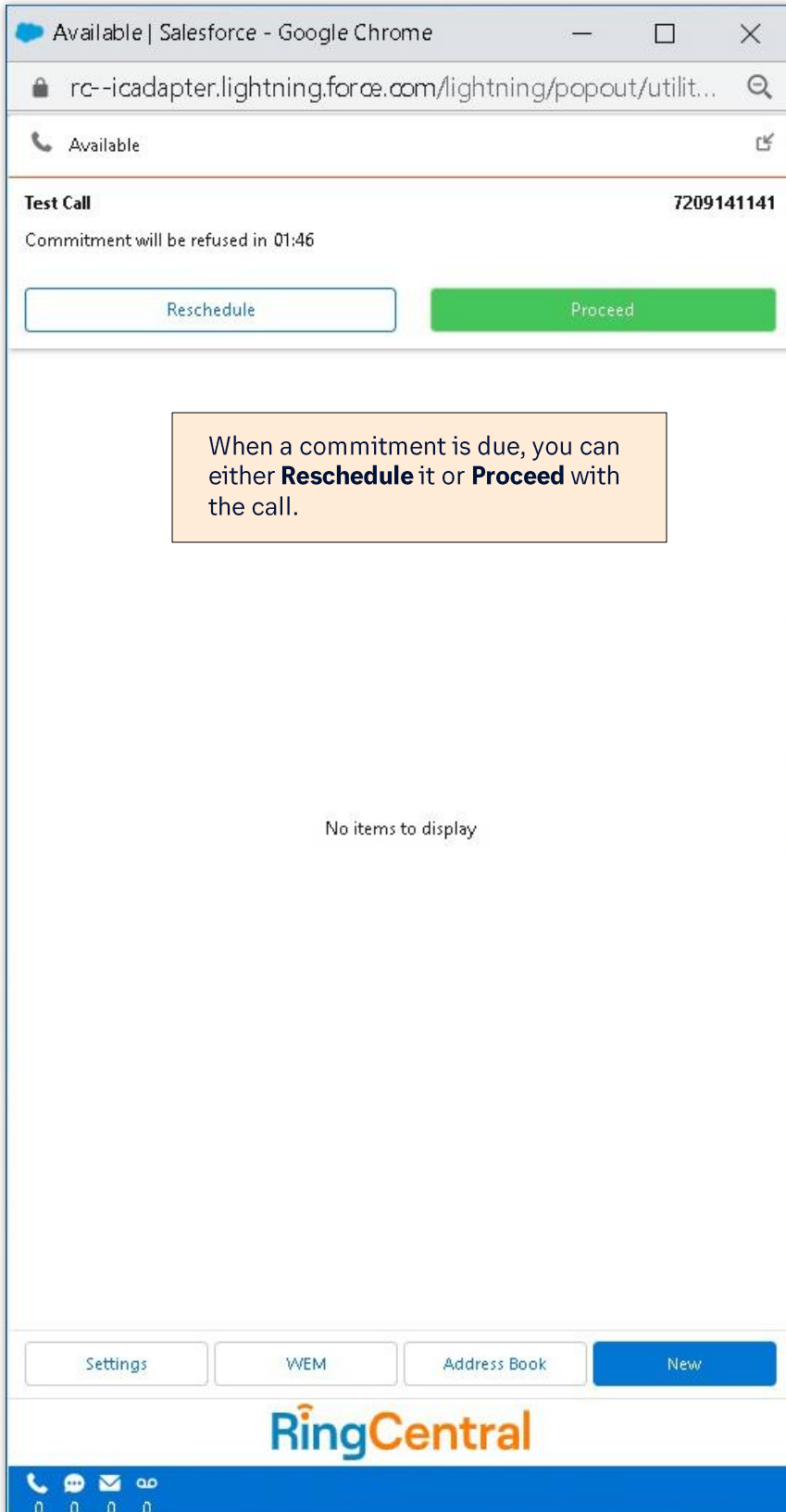
The **Commit** feature allows you to schedule callbacks to customers.

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

Working | Salesforce - Google Chrome

rc--icadapter.lightning.force.com/lightning/popout/utilit...

Working

← Back

Holding: Happy Panda Training Center 04:25
Ireland Sales (4136436) On Hold : 00:08

Search

AGENTS SKILLS ADDRESS BOOK HISTORY

> Show Filters

LoggedOut	294:17:03
Alex Stranger	
LoggedOut	1987:04:30
Alpha Agapito	
LoggedOut	5155:09:20
Amber Ger	
LoggedOut	
Amber Hunter	
LoggedOut	
Blake Smith	
LoggedOut	91:37:49
Brittany Dinkel	
LoggedOut	1771:38:26
Cam O'Mile	
LoggedOut	5155:09:20
Carol Ina	
LoggedOut	1987:04:30
Carolyn Horowitz	
LoggedOut	5155:09:20
Cristian Moreno	
LoggedOut	66:49:44
Davey Admin	
Available	89:55:06

Make a selection from the Agents, Skills, Address Book, or History tab to transfer the customer.

[Click Here to See It](#)

Transfer/Conference (In Progress)

[Go Back and Explore More](#)

The screenshot shows a web browser window with the URL `rc--icadapter.lightning.force.com/lightning/popout/utilit...`. The interface displays a call management screen with the following elements:

- Call status: Working
- Home button
- Call list:
 - Greyed call: Holding: Happy Panda Training Center, Ireland Sales (4136436), On Hold: 08:46
 - Active call: Active: (720) 358-4358, Support OB (4135333), Active: 03:28
- Hide Contact Details button
- ACCOUNT (1): Happy Panda Training Center
- Name dropdown: None
- Relates To Account dropdown: Happy Panda Training Center
- Notes text area: Enter Notes
- Call control buttons:
 - Mute
 - Record
 - Mask
 - Dialpad
 - Merge
 - Address Book
 - End
 - Transfer
 - Hold
- Bottom status bar with icons for call, chat, email, and voicemail.

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

The other call is automatically placed on hold.

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

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

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

Ending a Call (Wrap Up & Disposition)

[Go Back and Explore More](#)

Wrap Up | Salesforce - Google Chrome

rc--icadapter.lightning.force.com/lightning/popout/utilit...

Wrap Up

← Back

Wrap-Up

Name
None

Relates To [Account](#)
Happy Panda Training Center

Disposition
Case - Resolved

Notes
Showed client where the reset password link is

Save

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

Working | Salesforce - Google Chrome

rc--icadapter.lightning.force.com/lightning/popout/utilit...

Working

Home

EMAIL

phil.koorsen@ringcentral.com sent an email Jan 31, 2022, 12:23:13 PM

To : hpt@mail.nice-incontact.com

image001.png

Subject : Test

Hello,

I would like to buy your red gonkulator

Philip A Koorsen
TRAINING SPECIALIST
Connect with me: phil.koorsen@ringcentral.com

<http://netstorage.ringcentral.com/emails/signatur>

<http://netstorage.ringcentral.com/WAO.png>

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](#)

> [Show Contact Details](#)

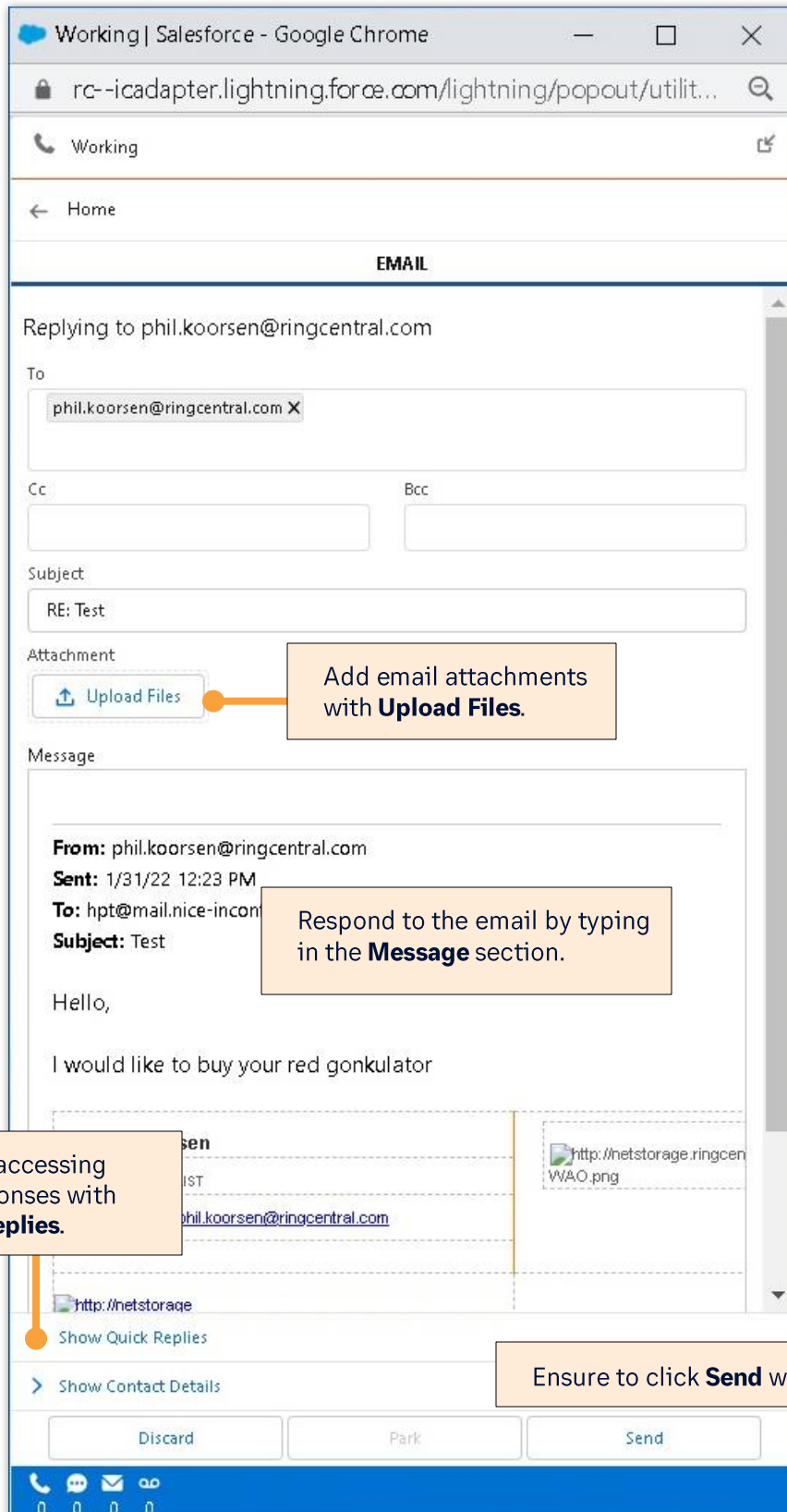
Forward Transfer Park Requeue

End Reply Reply All

0 0 0 0

Handling Emails

[Go Back and Explore More](#)



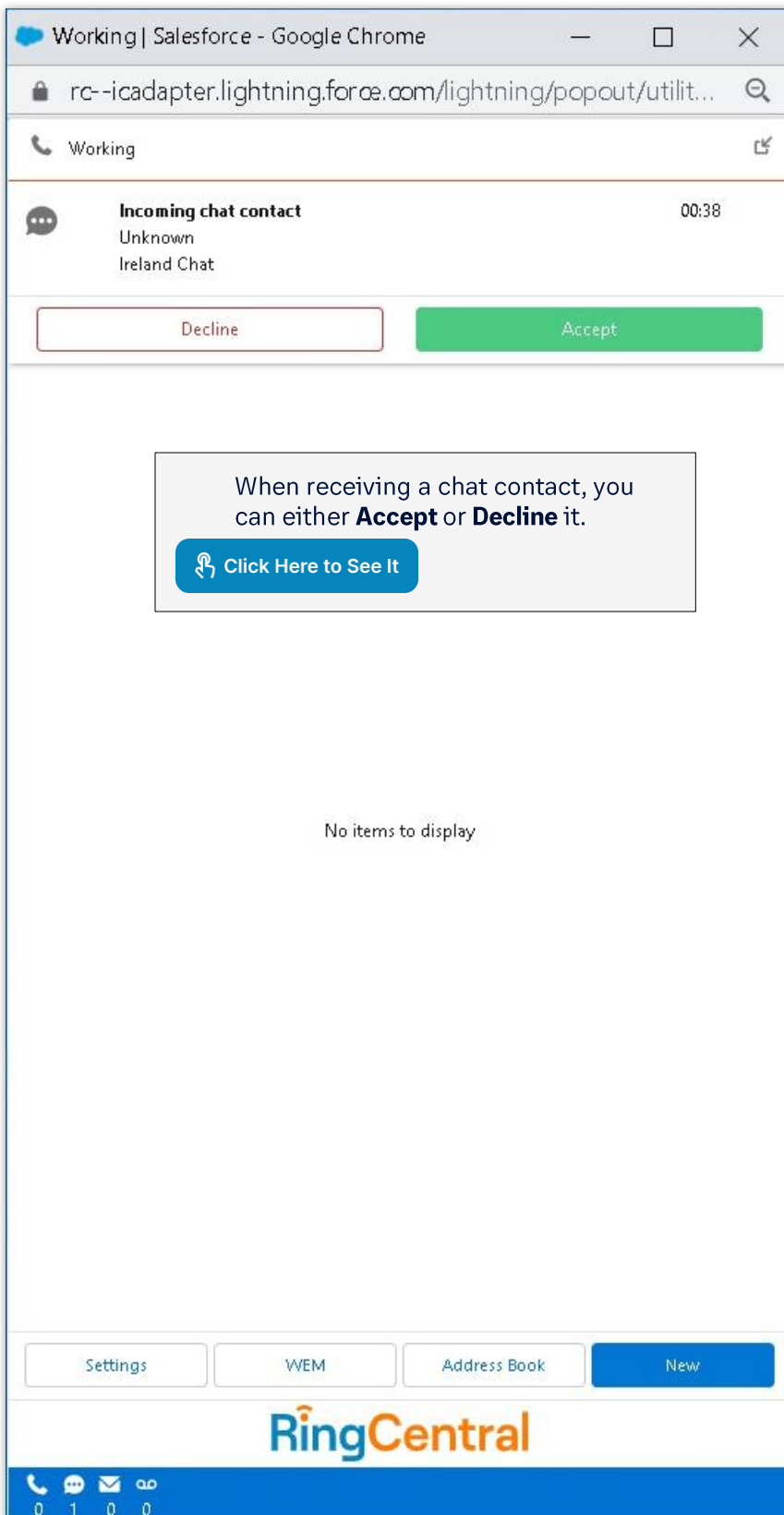
Add email attachments with **Upload Files**.

Respond to the email by typing in the **Message** section.

Save time, by accessing prepared responses with **Show Quick Replies**.

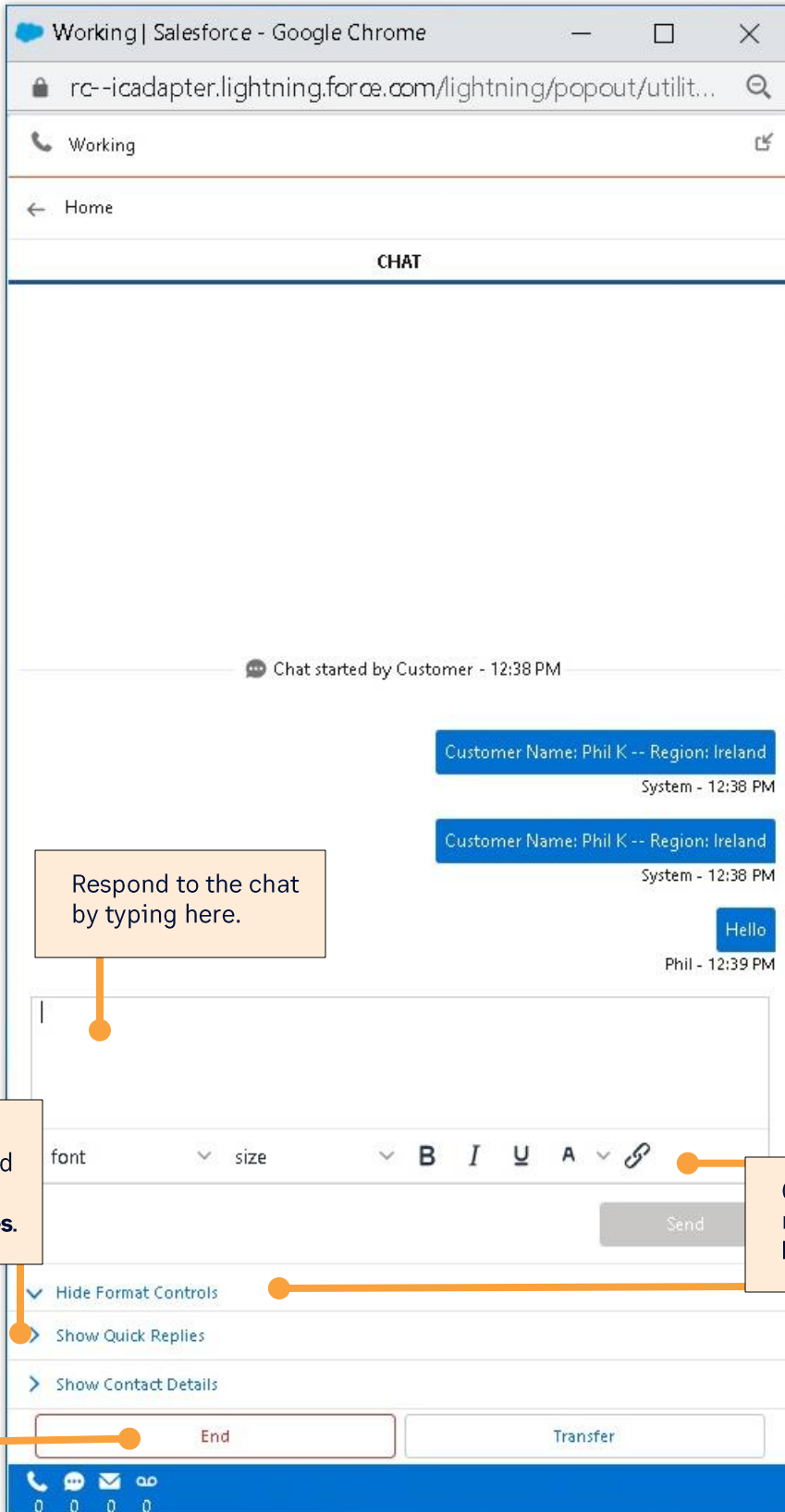
Ensure to click **Send** when ready.

Initial Chat Contacts



Handling Chats

[Go Back and Explore More](#)



Respond to the chat by typing here.

Save time, by accessing prepared responses with **Show Quick Replies**.

When no further responses are needed, click **End**.

Customize your message with the **Format Controls**.

Handling Voicemails

[Go Back and Explore More](#)

