

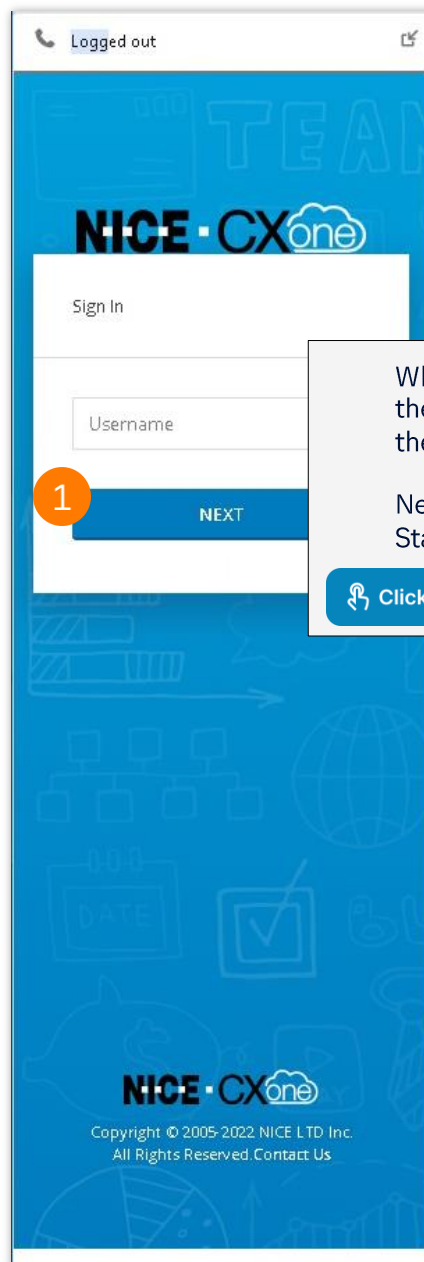
# Salesforce Agent – Classic in Lightning Interactive Quick Guide

## Instructions

Use this Interactive Quick Guide to explore the basics of the Salesforce Agent – Lightning & Classic.

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

The screenshot shows the RingCentral Salesforce Agent interface. At the top, it says "Logged out". Below that, there's a "Salesforce Agent" header and another "Logged out" status. The "Options" menu is open, showing two radio buttons: "Phone Number" (unselected) and "Station ID" (selected). Below this, the "Agent Station ID:" field contains the number "2762906", with a red circle and the number "1" next to it. There are also checkboxes for "Enable Tooltips", a "Log Level:" dropdown menu set to "ALL", and buttons for "Save" (with a red circle and the number "2" next to it) and "Cancel". Below these are "Download Log" and "Audio" settings (New agent message, New contacts, New chat message, End chat or call), and "Visual" settings (New agent message, New contacts). The bottom of the screen shows a navigation bar with icons for home, call, checkmark, chat, user, and mail.

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

After this, you are logged into the Agent tool.

[Click Here to See It](#)

## Initial Log In (Unavailable)

The screenshot displays the RingCentral Salesforce Agent interface. At the top, a status bar shows a phone icon, the text 'Unavailable', and a refresh icon. Below this is a dark blue header with 'Salesforce Agent' and a link icon. A dropdown menu is open, showing a red circle icon and the text 'Unavailable'. A circled '1' is positioned to the right of this dropdown. Below the dropdown is a timer showing ':42'. A section titled 'Select Outbound' contains a grid of icons: a phone, a person, a calendar, a clock, an information icon, an envelope, a star, a bar chart, a calendar, a bell, and a question mark. A notification box on the right contains the text: 'You are now logged in. It's time to set your Agent State to Available and start handling customer contacts.' Below the text is a blue button with a link icon and the text 'Click Here to See It'. At the bottom of the interface is a dark blue footer with a menu icon, several status icons (phone, checkmark, speech bubble, person, envelope) each followed by a '0', and the RingCentral logo.

## Agent States

1

Unavailable

Salesforce Agent

Unavailable

Available

Break

Direct Line Call

Extended Wrap Up

Lunch

Meeting

Technical Issue

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](#)

## Available (Ready for Contacts)

Available

Salesforce Agent

Available

1:24

1. Phone icon

2. Person icon

3. Wrench and screwdriver icon

4. Pin icon

5. Clock icon

6. Information icon

7. Bar chart icon

8. Email icon

9. Pushpin icon

10. Calendar icon

11. Bell icon

12. Question mark icon

Click the pin icon to create a commitment or callback.

Click the email icon to initiate an Outbound Email.

As contacts, such as phone calls or emails, come to you, their information appears in this area.

Click this icon to open the support and help site.

You are now ready for customer contacts.

Select something to explore.

- [Dial Pad](#)
- [Agent Directory](#)
- [Skills](#)
- [Address Book](#)
- [Contact History](#)
- [Agent Information](#)
- [Agent Reports](#)
- [Schedule](#)
- [Messages](#)

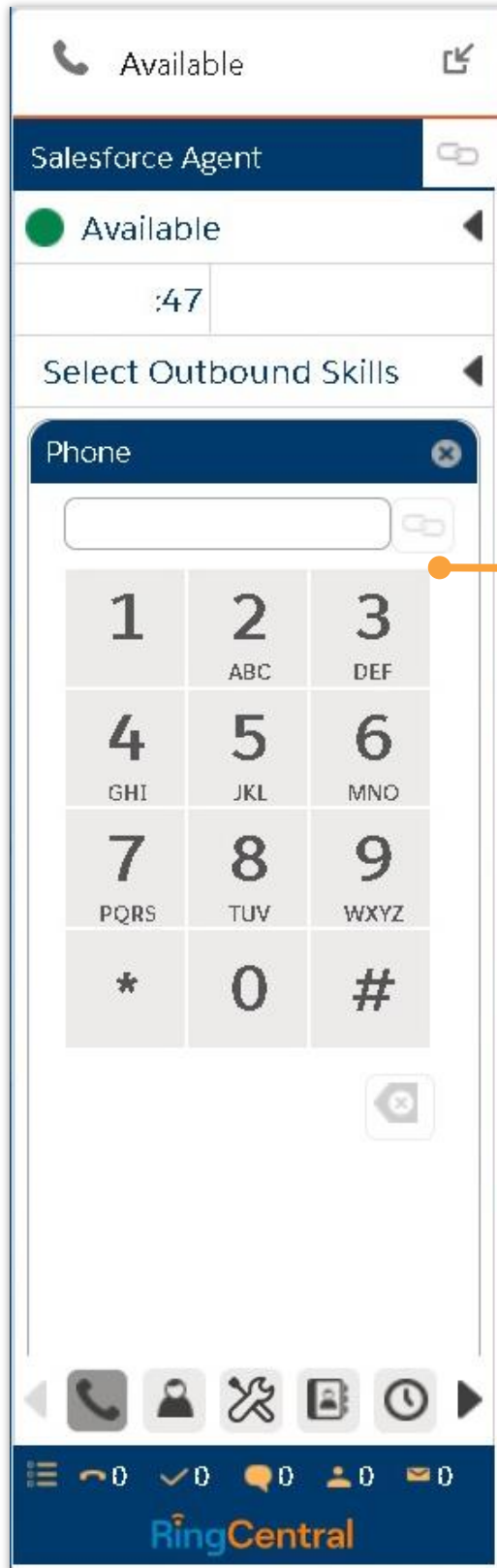
Click to explore how to:

- [Take inbound calls](#)
- [Handle emails](#)
- [Handle chats](#)
- [Handle voicemails](#)
- [Logging out](#)

RingCentral

## Dial Pad for Outbound Calls

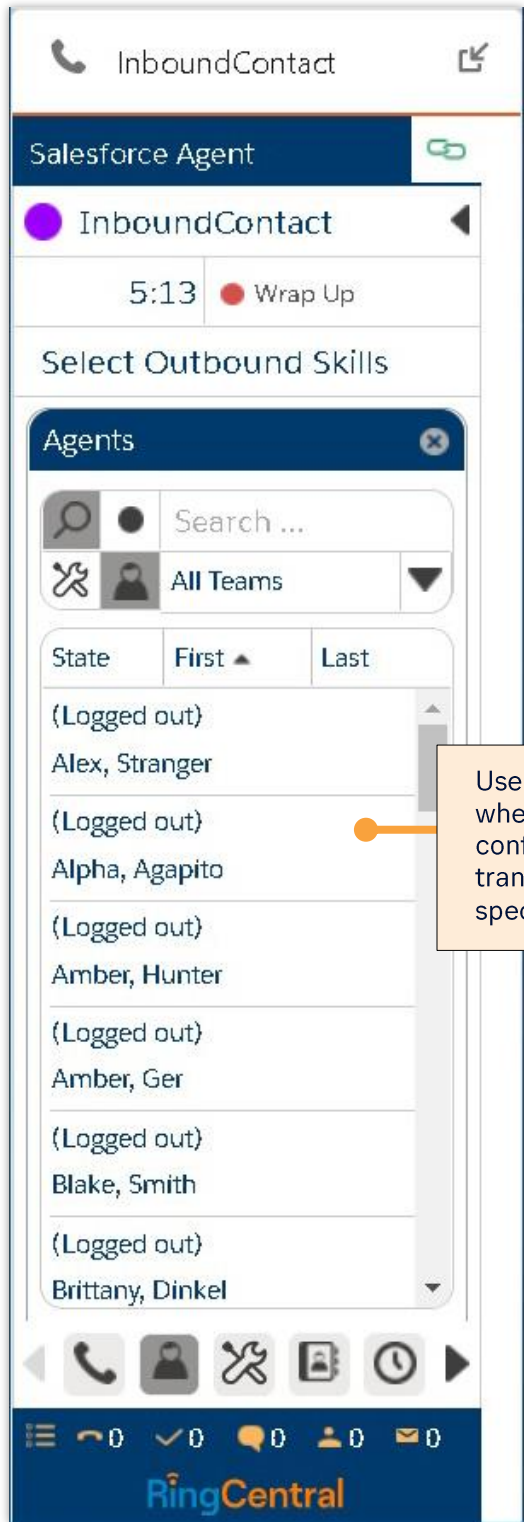
[Go Back and Explore More](#)



For manually dialed calls, use the **Dial Pad** to enter the number and the **chain icon** to make the call.

# Agent Directory

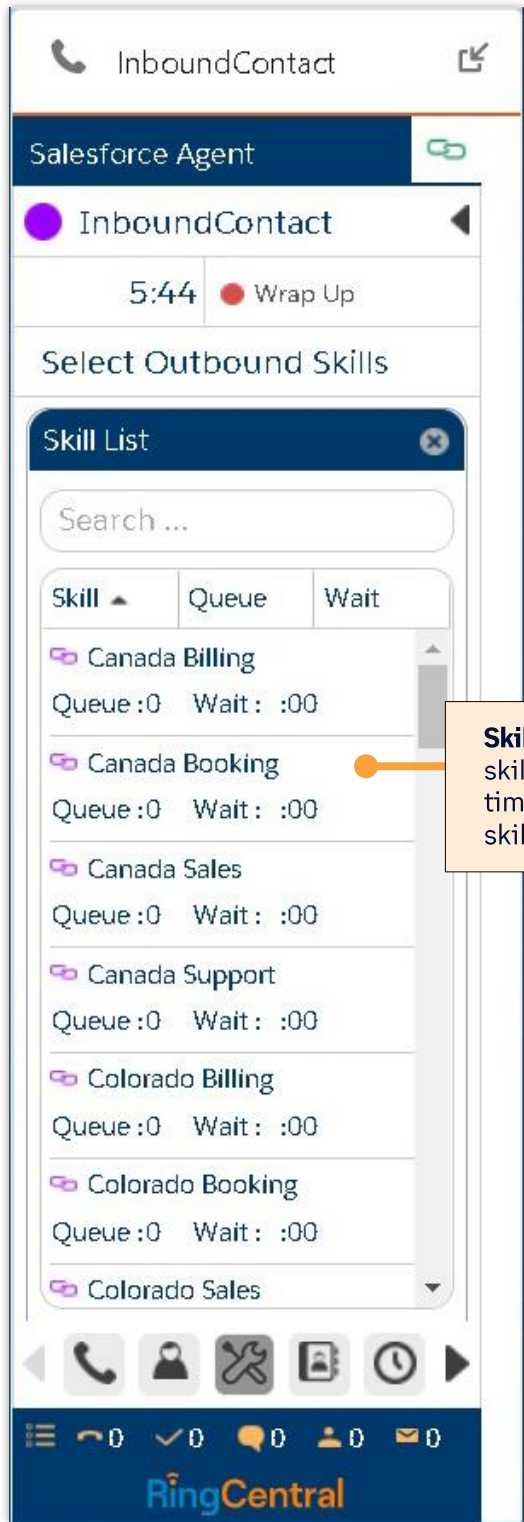
[Go Back and Explore More](#)



Use the **Agent Directory** when you need to conference in or transfer a contact to a specific agent.

# Skills

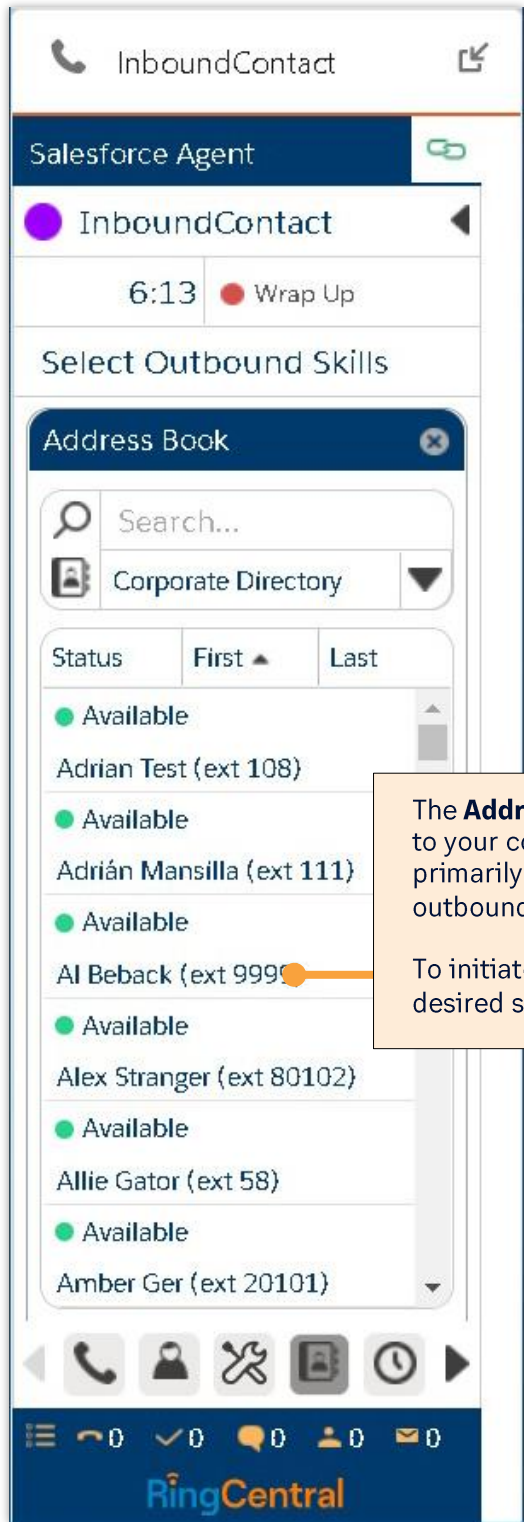
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# Address Book

[Go Back and Explore More](#)

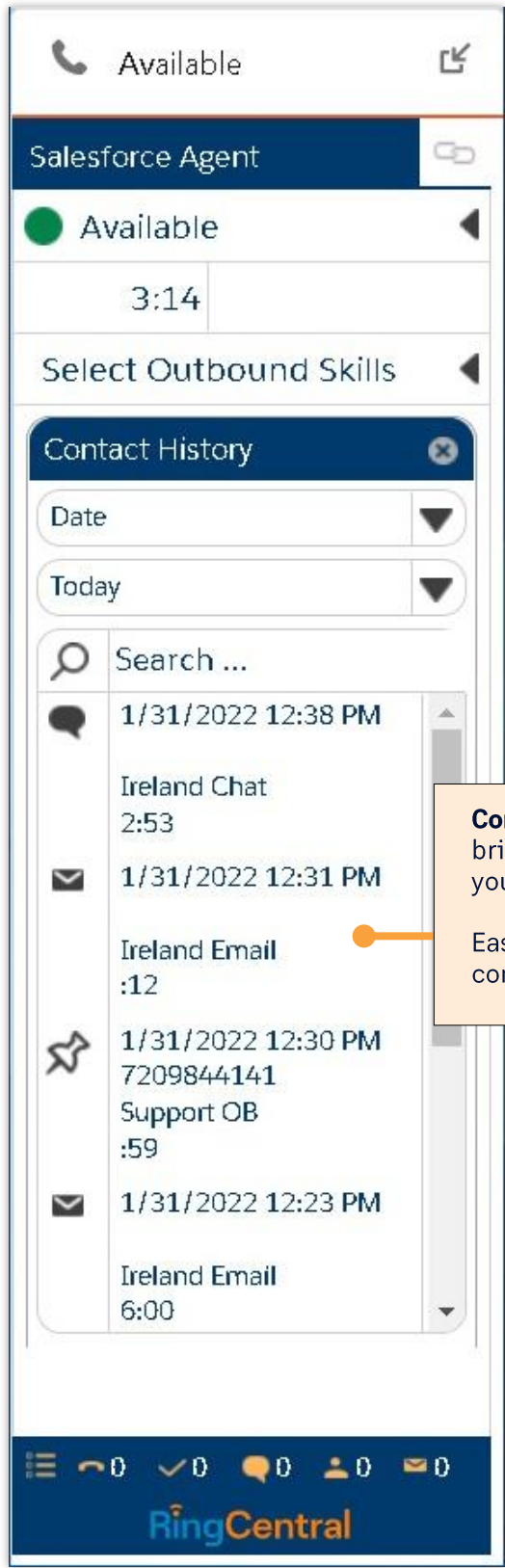


The **Address Book** provides access to your corporate directory and is primarily used for transfers and outbound contacts.

To initiate a contact, click the desired selection.

# Contact History

[Go Back and Explore More](#)

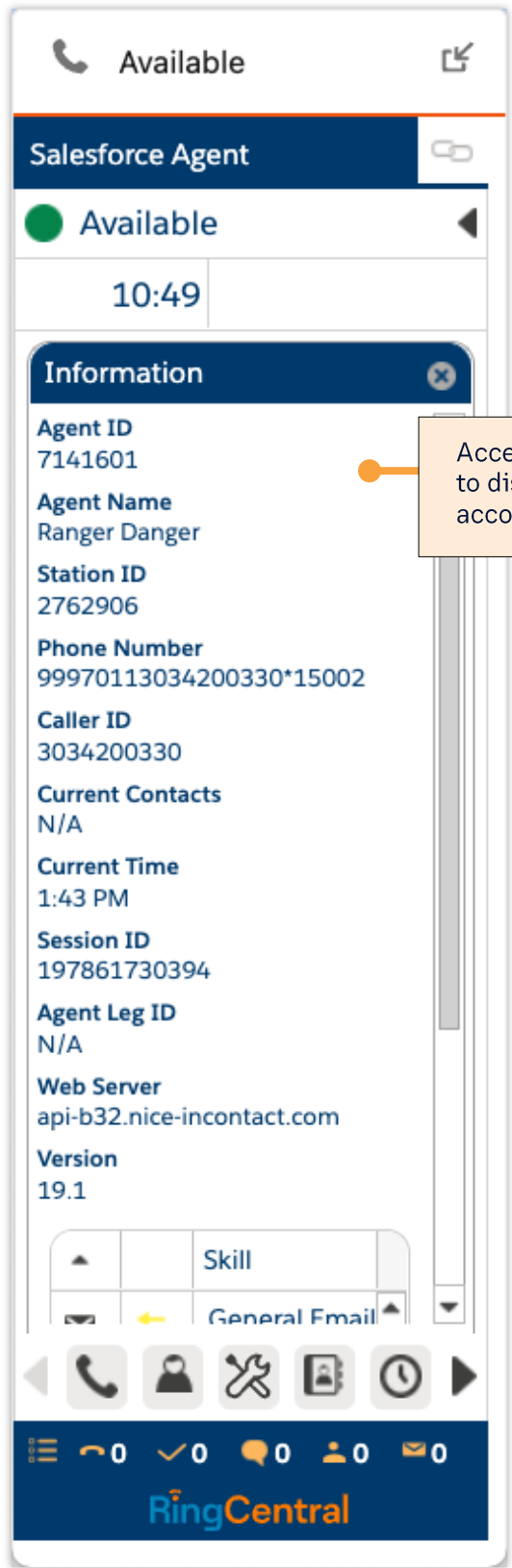


**Contact History** displays a brief history of contacts that you've handled.

Easily re-connect with any contact by clicking on it.

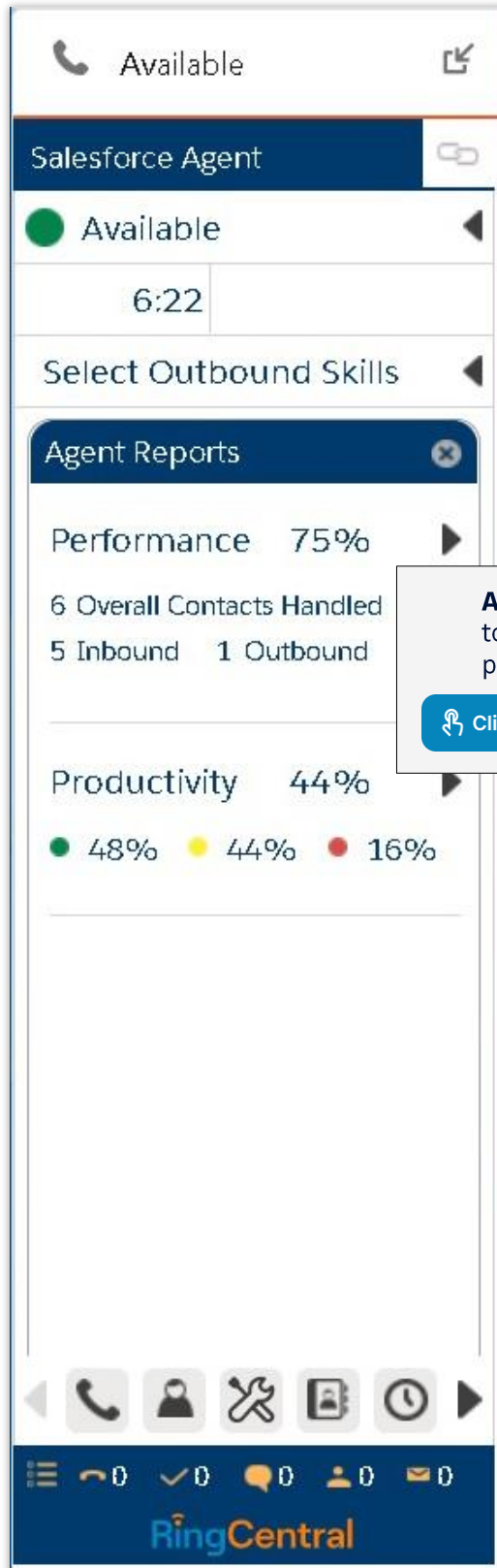
# Agent Information

[Go Back and Explore More](#)



Access **Agent Information** to display your basic account information.

## Agent Reports



**Agent Reports** provides access to basic performance and productivity information.

[Click Here to See It](#)

## Agent Performance

The screenshot shows the RingCentral Salesforce Agent interface. At the top, it displays 'Available' with a phone icon and a share icon. Below that is a 'Salesforce Agent' header with a link icon. A green status indicator shows 'Available' with a left arrow. A timer shows '6:58'. A dropdown menu is open for 'Select Outbound Skills'. A performance summary bar shows 'Performance 75%' with a close icon. Below this is a table with columns for 'Today', 'Yesterday', and 'Last'. The table data is as follows:

	Today	Yesterday	Last
		You	Team
			% of Team
Inbound		5	6
			83%
Outbound		1	2
			50%
Overall		6	8
			75%

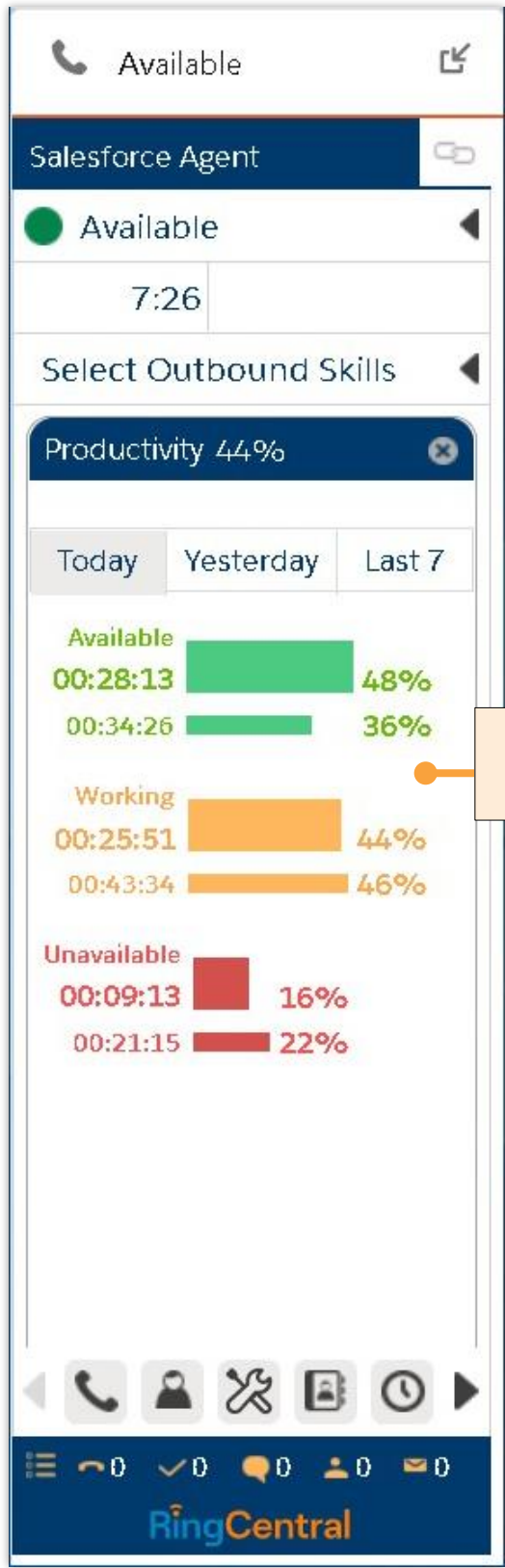
At the bottom of the interface is a navigation bar with icons for phone, profile, tools, calendar, and clock. Below the navigation bar is a status bar with icons for menu, call, checkmark, chat, person, and mail. The RingCentral logo is at the very bottom.

You can review **Performance** here. You can also review Productivity.

[Click Here to See It](#)

# Agent Productivity

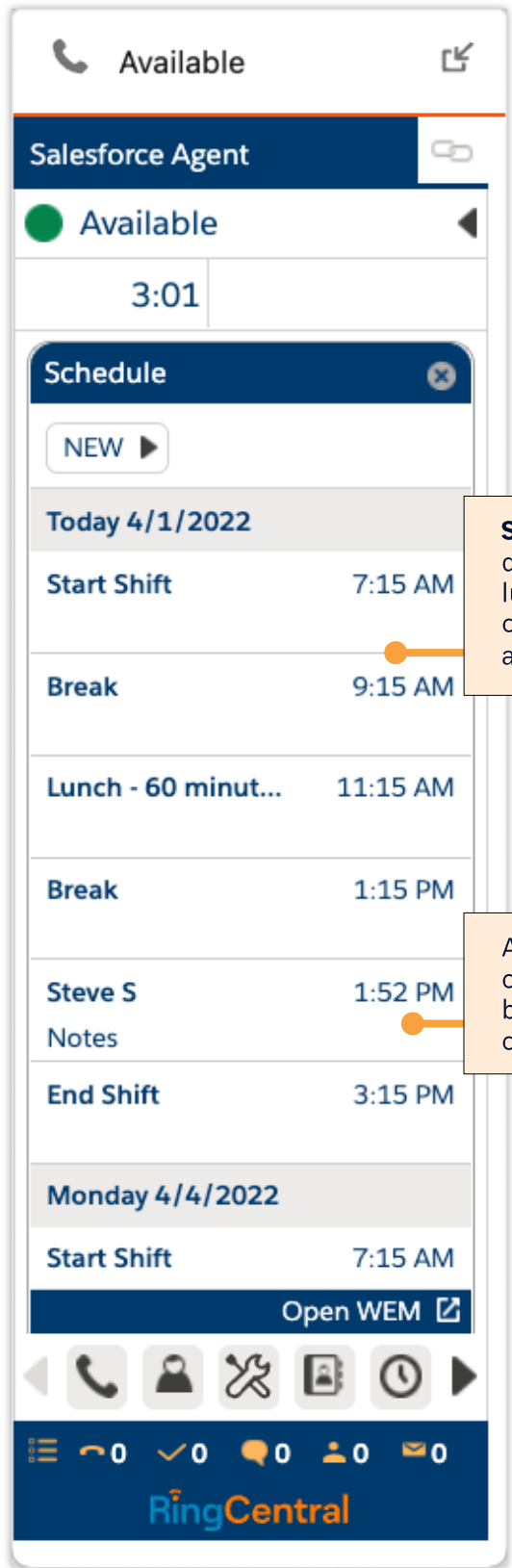
[Go Back and Explore More](#)



You can review **Productivity** here.

# Schedule

[Go Back and Explore More](#)

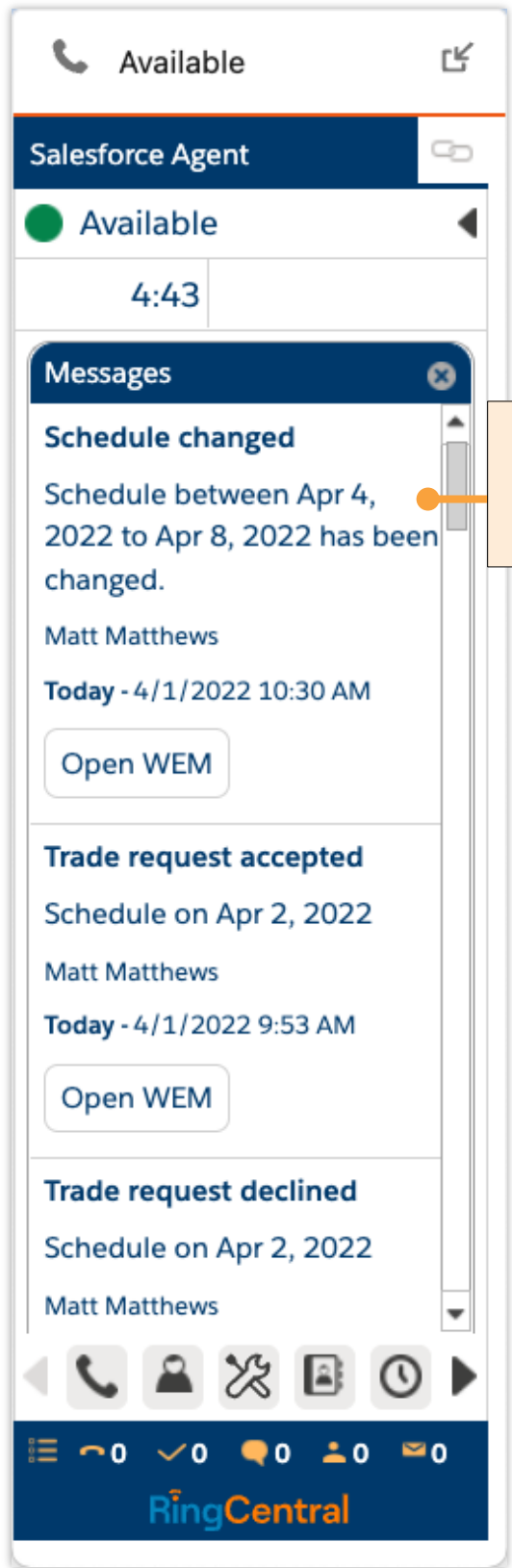


**Schedule** includes your daily events like breaks, lunches, and even customer commitments assigned to you.

Access and edit customer commitments before they are due by clicking on them here.

# Messages

[Go Back and Explore More](#)



**Messages** displays internal messages such as schedule changes or other messages.



## Take Inbound Calls (Establish the Agent Leg)

InboundContact

Salesforce Agent

InboundContact

:05 Available

7201414141 :07  
Ireland Billing  
(Incoming) 1:27

Account (1)  
Happy Panda Training Cen...

Unknown caller  
(342) 420-0230

Ignore More

To voicemail Answer

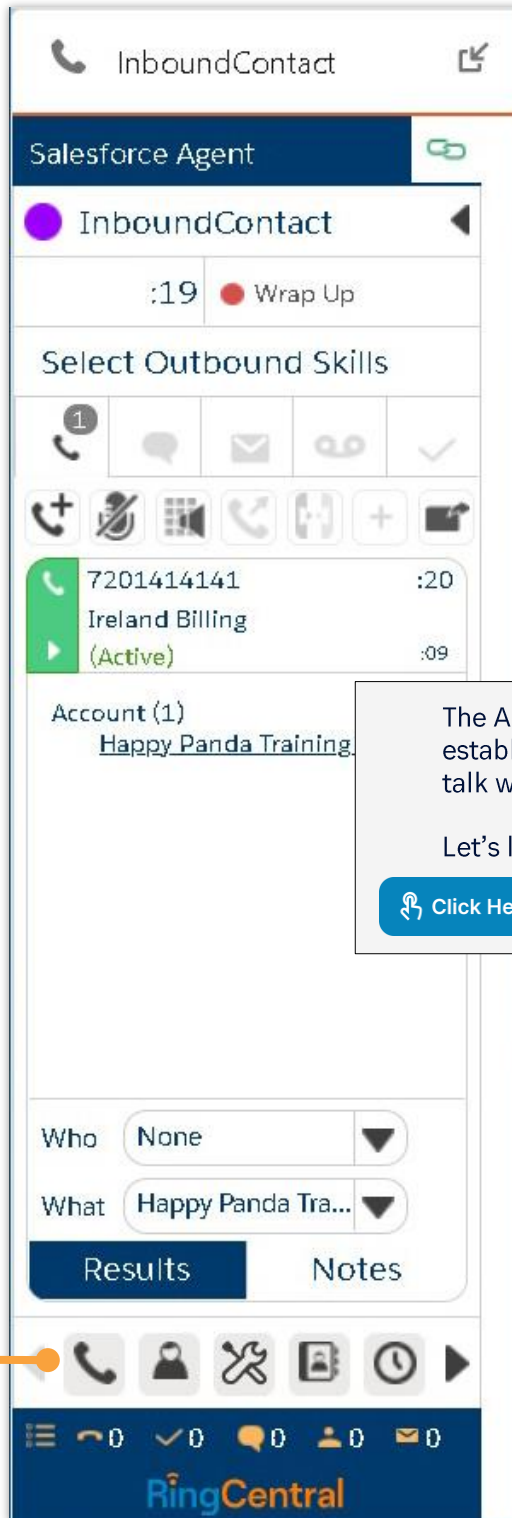
Click Here to See It

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.

## Take Inbound Calls (Active Call)



The Agent Leg is now established, and you can now talk with the customer.

Let's learn about **Call Controls**.

[Click Here to See It](#)

These icons are used the same as when they are located in the main section, when you are waiting for an active contact.

## Take Inbound Calls (Call Controls)

[Go Back and Explore More](#)

The screenshot displays the RingCentral Salesforce Agent interface during an inbound call. The call duration is 1:10 and a 'Wrap Up' timer is active. The interface includes a top header with 'InboundContact', a 'Salesforce Agent' profile, and a call status bar. A central toolbar contains icons for Mute, Hold, Hang Up, Record, Mask, and Commit. Below the toolbar, there are fields for 'Who' (None) and 'What' (Happy Pa), and a 'Results' button. The bottom of the screen shows a RingCentral status bar with various icons and the RingCentral logo.

Click to **Hang Up** on the call.

Click **Record** to start a manual recording.  
Cannot be stopped, once started.

Click to **Mute** and unmute.

Simply hover over this section to display call controls.

Use **Commit** to schedule a callback for a customer.

Click to **Hold** and **Unhold**.

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

Explore the use of other call controls.

- [Commit](#)
- [Transfer/Conference](#)

## Scheduling Commitments

Available

Salesforce Agent

Available

5:19

Select Outbound Skills

Commitment Details

Phone  
5554441111

Assign To  
 Me  Skill

Select Skill

Time and Date  
1:52 PM - 1/31/2022

5 Min 10 Min 15 Min 30 Min 1 Hour

Call details

Submit Cancel

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

Click to see what happens when a commitment is due.

[Click Here to See It](#)

Use these buttons to quickly schedule a commitment for the current day and time, plus the timeframe selected.

Selecting **10 Min** schedules it for the current time, plus 10 minutes.

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

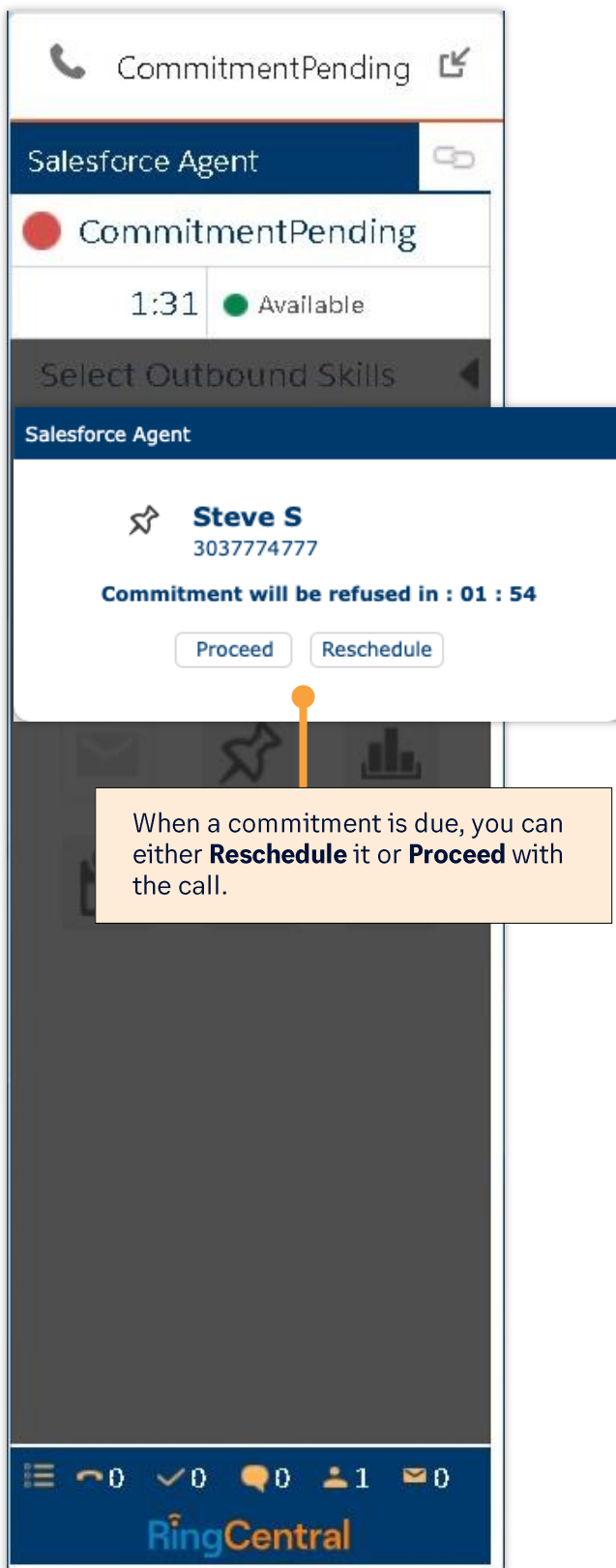
- **Assign To** – you or a Skill
- Accurate Time and Date

Note: If committing to a Skill and you handle more than one Skill, you must use the Select Skill dropdown.

Click **Submit** to set the commitment.

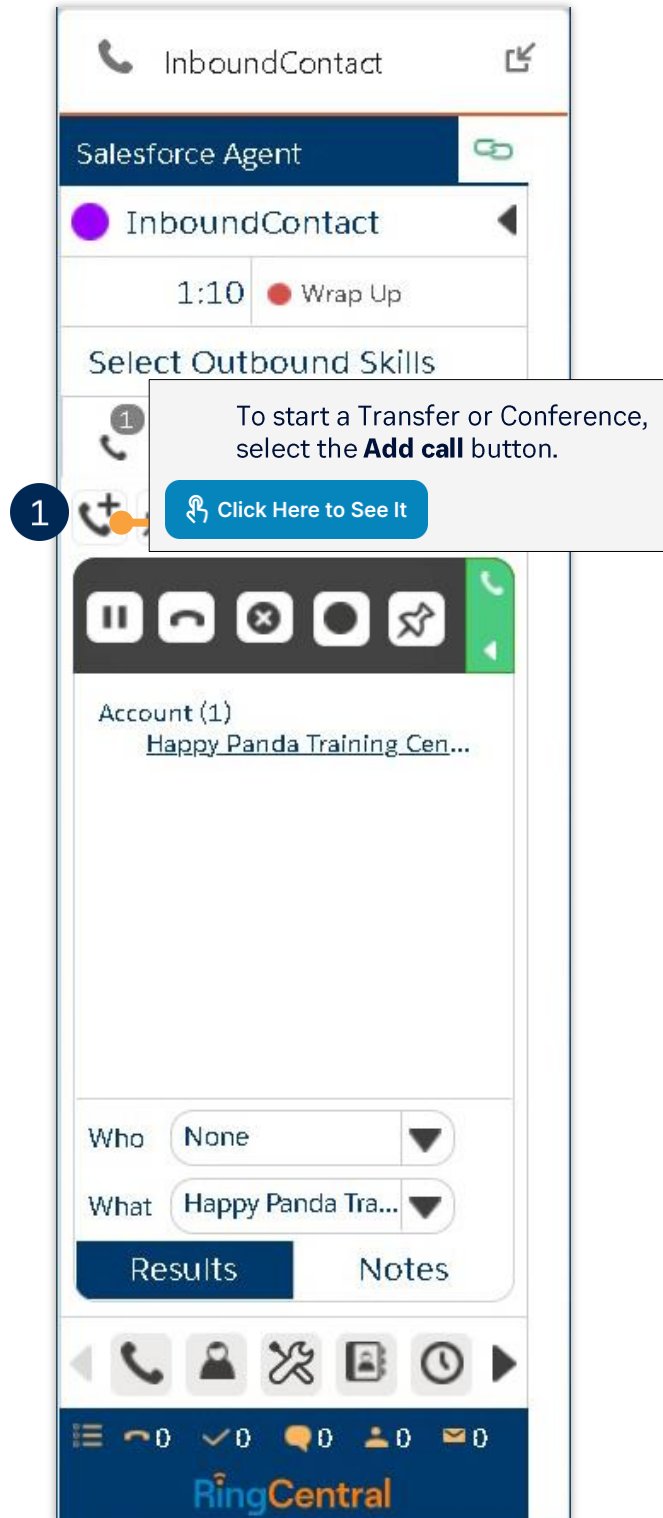
## Commitment Due

[Go Back and Explore More](#)

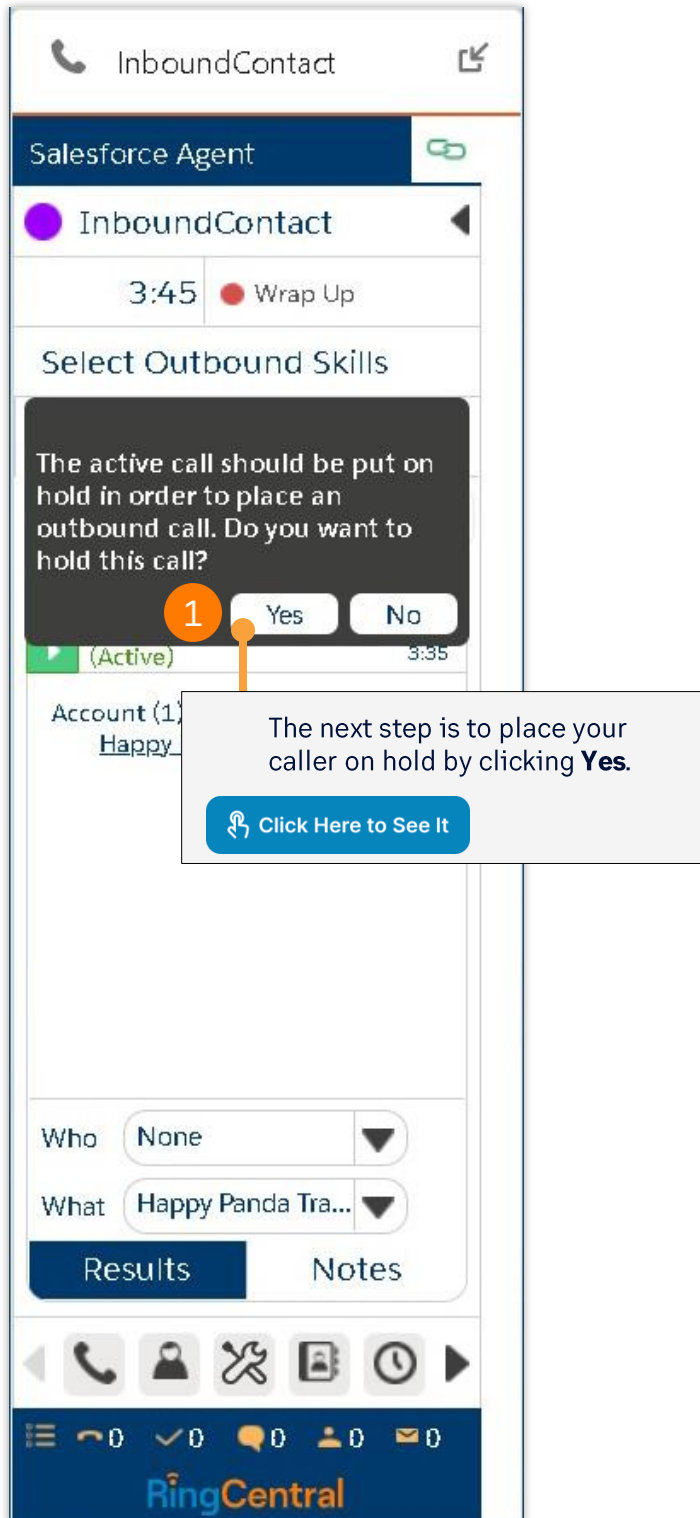


When a commitment is due, you can either **Reschedule** it or **Proceed** with the call.

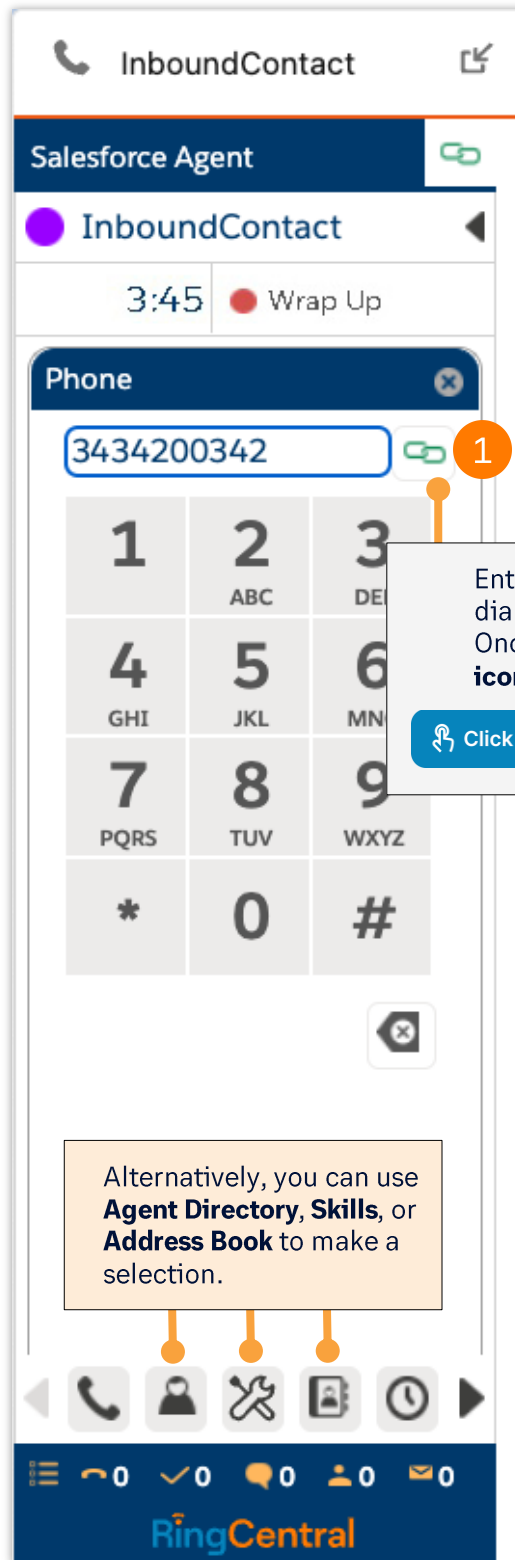
## Transfer/Conference (Add Call)



## Transfer/Conference (Caller On Hold)



## Transfer/Conference (Number Selection)



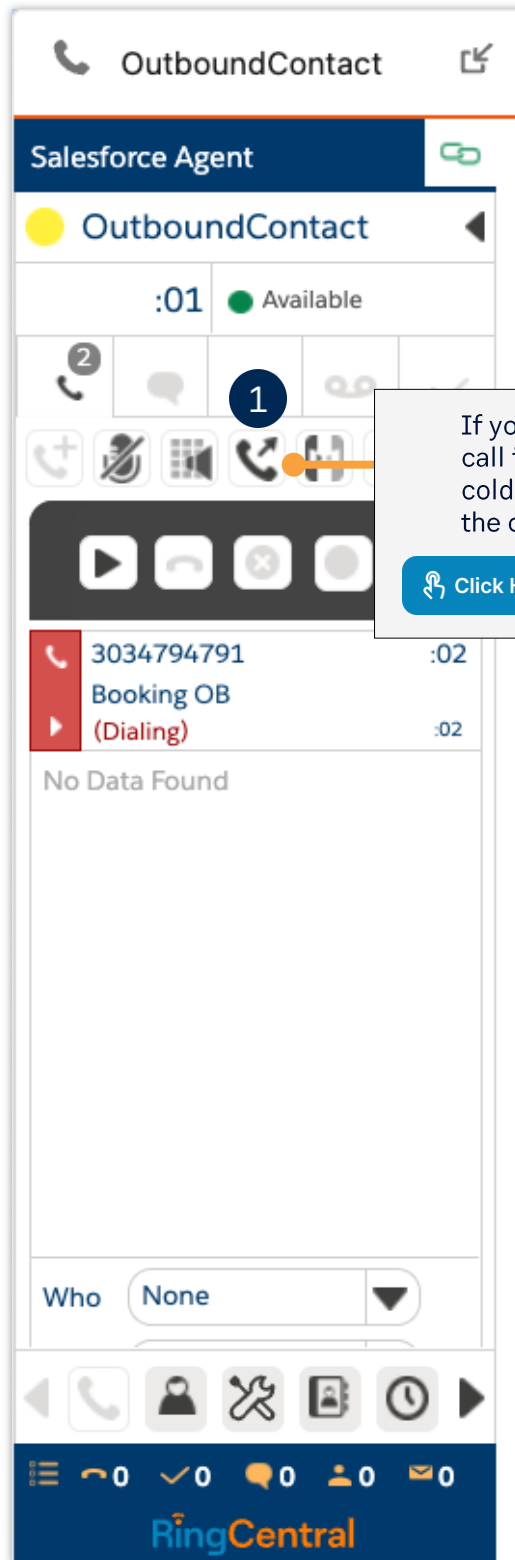
Enter a number for a manually dialed transfer/conference. Once entered, click the **chain icon** to initiate the call.

[Click Here to See It](#)

Alternatively, you can use **Agent Directory, Skills, or Address Book** to make a selection.



## Transfer/Conference (Cold Transfer)



If you select **Transfer** while the call is dialing, it is considered a cold transfer; otherwise, wait for the call to connect.

[Click Here to See It](#)

## Transfer/Conference (Complete)

[Go Back and Explore More](#)

The screenshot displays the RingCentral interface for a Salesforce Agent. At the top, it shows 'OutboundContact' and 'Salesforce Agent'. Below this, there's a call status section with 'OutboundContact' and a timer ':52'. A 'Wrap Up' button is visible. The main area contains call controls with icons for play, mute, hold, and transfer. A 'Who' dropdown menu is set to 'None'. The bottom of the screen features a RingCentral logo and a navigation bar with various icons.

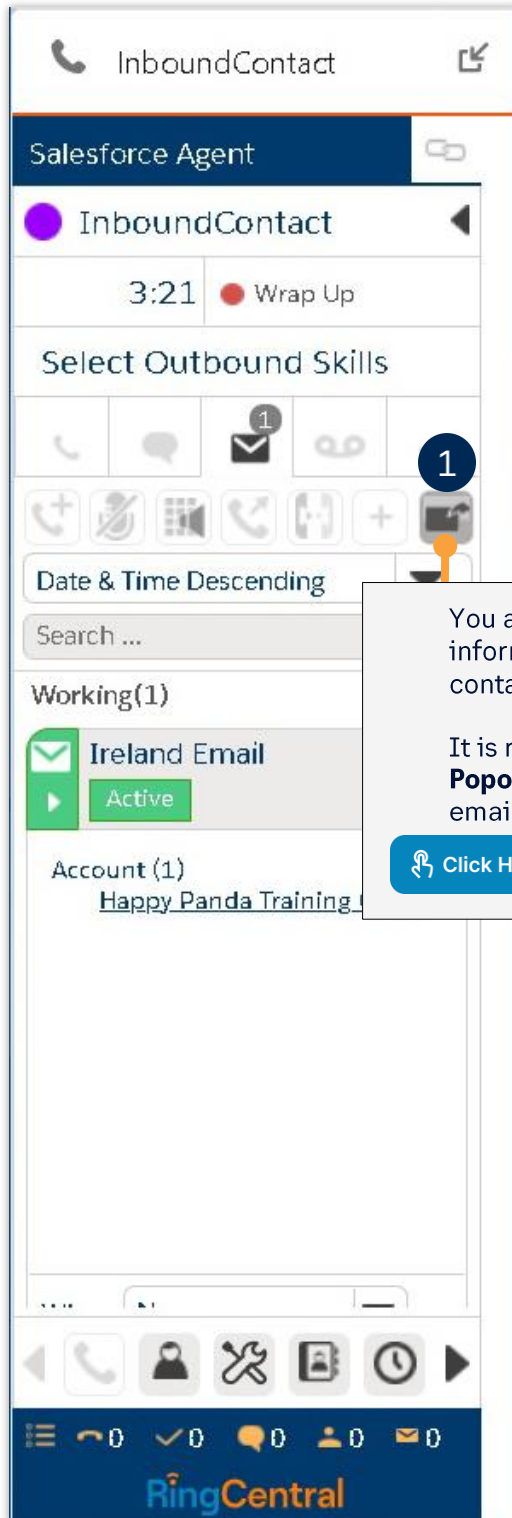
Selecting **Transfer** completes the transfer, releases you from the call, and places you in either the Available state or Wrap Up, used to notate the interaction.

Selecting **Conference** brings all lines into a single conversation.

The outline color of both calls change to green.

If you need to swap between the calls, put the active one on hold and take the other off hold.

## Initial Email Contacts



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

It is recommended to use the **Popout** button when handling emails and chats.

[Click Here to See It](#)

# Handling Emails

[Go Back and Explore More](#)

The screenshot shows the RingCentral interface for handling an email. It includes a navigation bar with 'Phone', 'Chat', 'Email', 'VoiceMail', and 'Work Item'. Below this is a toolbar with icons for actions like 'Send', 'Reply', 'Transfer', and 'Add Attachment'. The email header shows 'From: hil.koorsen@ringcentral.com', 'To:', 'Sent:', and 'Subject: Test'. The main content area contains the email body with a link to 'http://netstorage.ringcentral.com'. At the bottom, there are sections for 'Results' and 'Notes'. Five callout boxes provide instructions: 1. 'Save time, by accessing prepared responses with Quick Replies.' points to the 'Send' button. 2. 'After completing your email response, click the Send button.' points to the 'Send' button. 3. 'Add email attachments here.' points to the attachment icon. 4. 'Click Reply to start handling the message.' points to the 'Reply' button. 5. 'Type the response in the Message section.' points to the text input area.

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

After completing your email response, click the **Send** button.

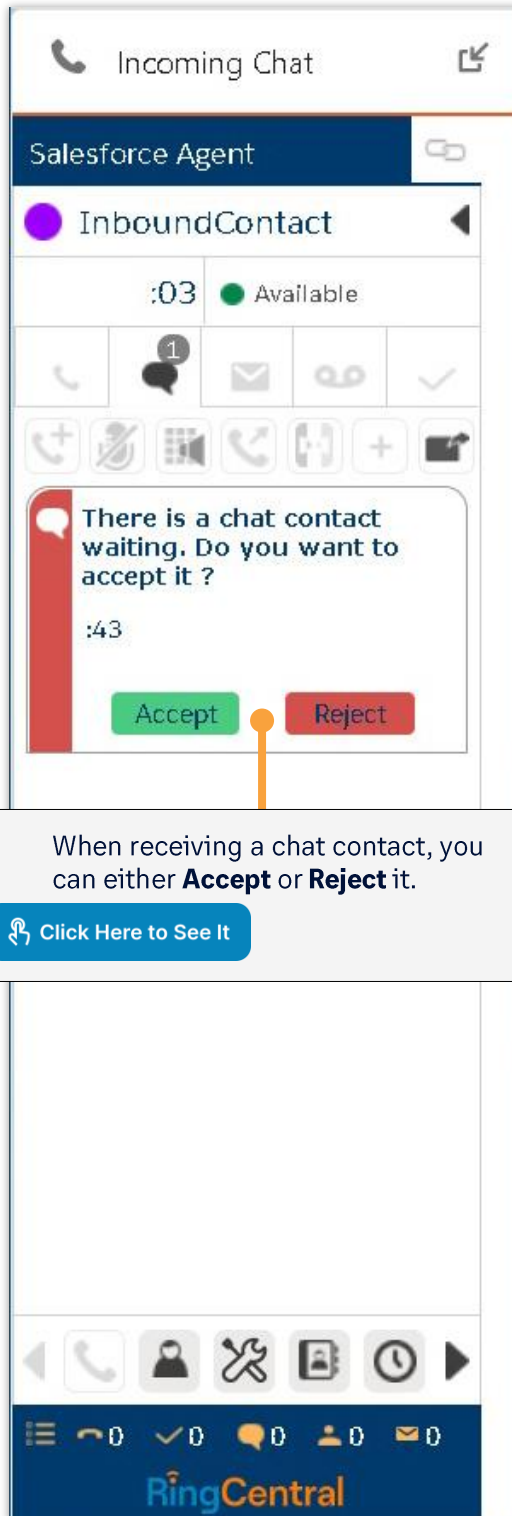
Add email attachments here.

Click **Reply** to start handling the message.

Hover over the active email to display additional controls, such as **Transfer**.

Type the response in the **Message** section.

## Initial Chat Contacts

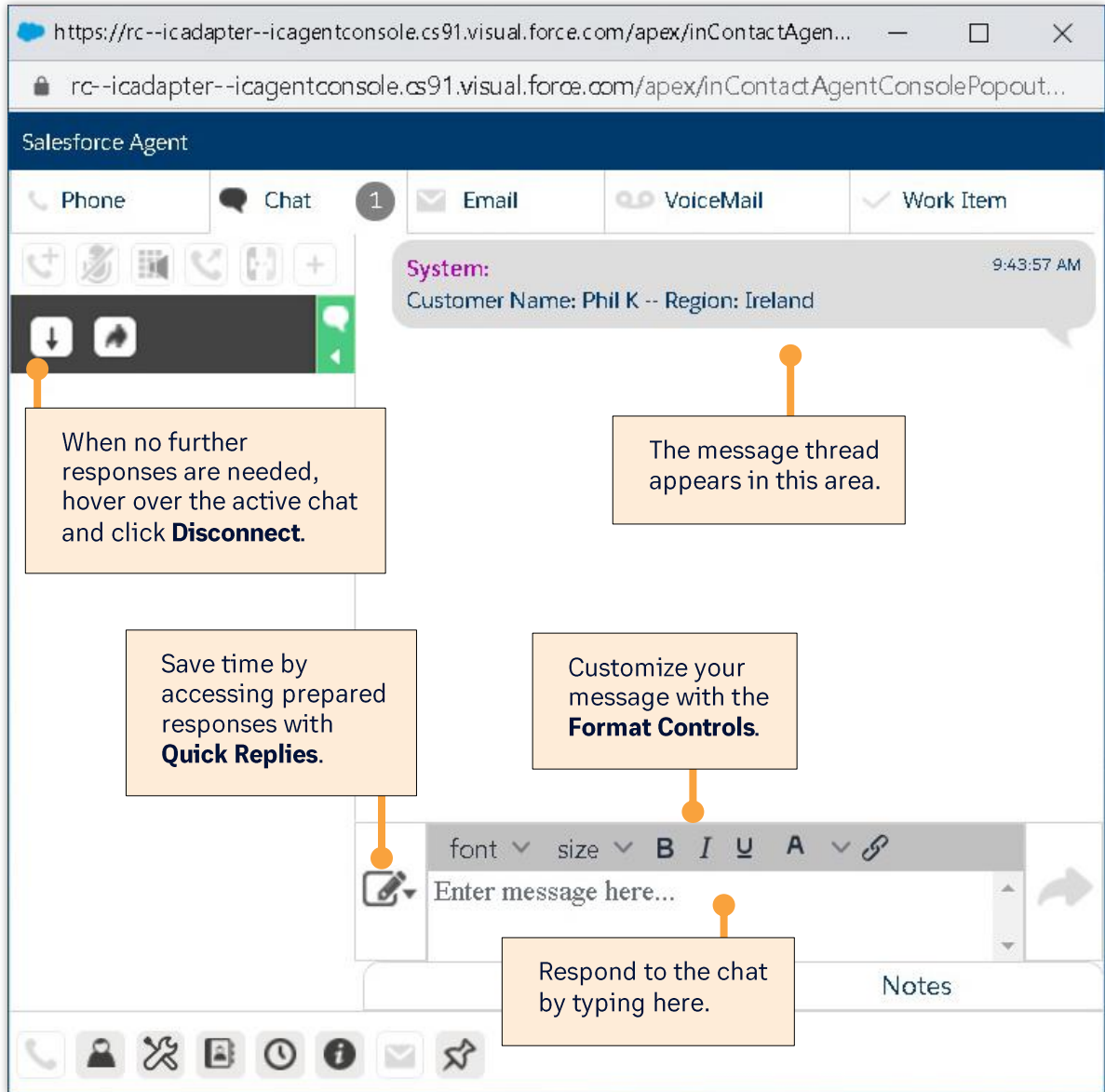


When receiving a chat contact, you can either **Accept** or **Reject** it.

[Click Here to See It](#)

# Handling Chats

[Go Back and Explore More](#)



# Handling Voicemails

[Go Back and Explore More](#)

The screenshot displays the RingCentral interface for an agent. At the top, it shows 'InboundContact' and 'Salesforce Agent'. Below this, there's a status bar for 'InboundContact' with a timer at '2:05' and a green 'Available' indicator. A section titled 'Select Outbound Skills' contains various icons. The main focus is on a voicemail player for 'Ireland Voicemail' with a duration of ':00 / :16'. A control bar above the player includes buttons for Transfer, Pause, Play, Disconnect, and a volume icon. Three callout boxes provide instructions: one for Transfer, one for Pause/Play, and one for Disconnect. A fourth callout box points to the control bar, stating that hovering over the active voicemail displays these buttons. At the bottom, there are dropdown menus for 'Who' (set to 'None') and 'What' (set to 'Happy Panda Tra...'), along with 'Results' and 'Notes' tabs. The RingCentral logo is at the very bottom.

**Hover** over the active voicemail to display the control buttons.

If the voicemail is better handled by someone else, **Transfer** it to them.

**Pause** or **Play** the voicemail as needed.

After completely addressing the voicemail, click **Disconnect**.

## Logging Out

[Go Back and Explore More](#)

The screenshot shows the RingCentral Salesforce Agent interface. At the top, there is a status bar with a phone icon, the word "Available", and a share icon. Below that is a header for "Salesforce Agent" with a link icon. A secondary status bar shows a green circle, the word "Available", and a back arrow. The time "9:48" is displayed. The main content area is titled "Options" with a help icon and a dropdown arrow. It contains several sections: "Agent Station ID: 2762877", "Submit Feedback:" with a "Form" button, "Log Level: ALL" with an "Edit" button, and "Logout" and "Download Log" buttons. Below these are "Audio" and "Visual" sections with checkboxes for notifications. At the bottom, there is a navigation bar with icons for home, back, forward, chat, profile, and mail, each with a "0" count. The RingCentral logo is at the very bottom.

2

1

When you are ready to logout:  
1. Click **Options**  
2. Click **Logout**